Why and How to Build a Genealogical Toolbox

When you think of a ‘Tool Box’ is this what comes to mind?

What advantages does such a toolbox offer its owner?

- Portable
- Carries everything needed to get the job done
- Keeps everything in one easily accessible place
- You know where you keep it
- Contents might remind you of other tasks that need to be done

A genealogy tool box offers the same benefits!

You may have already have the beginnings of, or even an extensive, genealogy toolbox without even thinking of it as a toolbox. If you’ve bookmarked or saved webpages to your ‘Favorites’ in your Browser then you’ve already begun a research toolbox.
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Two quick examples of Genealogy “Toolboxes” already in existence! Are you using them?

- GSSWI provides access to one (GSSWI.org) as do most genealogical societies.

- Cyndi’s List (cyndislist.com) is really just a huge genealogical toolbox.

While these toolboxes can be very helpful, they do have some disadvantages. What might they be?

- Someone else put them together so they probably contain links to information you don’t necessarily need
- You can’t organize the contents in a way that works for you
- They don’t allow you to add new links or delete ones that you no longer need
- They reside only on the internet
- They are not specific enough
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What’s the solution? Build your own version of Cyndislist of course!

What are the advantages of building your own toolbox?

1. You can add specific links and information that apply only to your research
2. You can add or delete links and information as needed

There are a wide variety of choices you can use to store your toolbox. Each has its pros and cons so you need to decide the one that will work best for you. It has to be easy or you won’t use it.

Some things to consider.

- Ease of access – can you access it from anywhere? Do you need to?
- Ease of use – you won’t use it if it’s difficult for you to use!
- Sortability – can you sort the list or manage the order of items in some way
- Portability – if you have multiple devices can it reside on all of them? Does it need to?
- Storage limits – if you are using cloud based storage is there sufficient space?
- Searchable – as the list grows can you search for what you want?
- Easily updatable – you want to spend your time researching, not trying to update your toolbox

In order for your toolbox to be useful it will need to be organized. While just copying one link after another into your toolbox is easy enough, finding the link you want 2 months later could drive you over the edge. How might you categorize the various items in your toolbox in order to keep it organized.

The easiest way to organize the links is to categorize them but what categories will you need? It will be an ongoing process but there are some categories that just seem obvious. You may come up with something that works better for you but I’d suggest putting the links or information into genealogical type record categories:

- birth/christening
- death
- cemeteries
- marriage
- census

- land
- court
- newspapers
- photos
- maps, etc.

You’ll undoubtedly come up with links or information specific to geographic areas so you’ll need something to hold these:

- City (the actual city names)
- County (the actual county names)
- State/Province (the actual State/Province names)
- Country (the actual Country names)

You may also find useful links to sites with information on your family surnames, to genealogical repositories, to genealogical and historical societies, to topics (Rev. War, Civil War, migration patterns, the dustbowl, Quakerism, etc.), to different search engines, to useful tools (birth date calculators, the historical value of money, language translators, etc.) There are many possible categories.

You don’t have to think of them all at once – just add new categories as they arise.

The list can be long but the longer the list the more valuable the toolbox. Who wouldn’t want to have access to all their most helpful sites and information at their fingertips?
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How you create these categories depends entirely on what method you use to store the links.

Where do I build my toolbox?

- Word processing document
- Spreadsheet
- Note taking applications (e.g. Evernote or One Note)
- File manager applications built into your operating system such as Windows Explorer
- Your web browser (Favorites and Bookmarks)
- On your personal Blog, Website or Wiki
- Online storage sites
- Combinations of the above (i.e. a word processing document stored in dropbox)

If you use word processing document I’d suggest using a two column table with breaks between each category. The first column is a description of the link and the second column is the link itself.

<table>
<thead>
<tr>
<th>Census</th>
<th><a href="http://www.censusfinder.com/index.htm">http://www.censusfinder.com/index.htm</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>City Directories</td>
<td><a href="http://www.uscitydirectories.com/">http://www.uscitydirectories.com/</a></td>
</tr>
<tr>
<td>City Directories of the US</td>
<td><a href="http://www.evendon.net/PGHLookups/DirM.htm">http://www.evendon.net/PGHLookups/DirM.htm</a></td>
</tr>
<tr>
<td>Eve &amp; Don CityDirs</td>
<td></td>
</tr>
<tr>
<td>Online Historical Directories</td>
<td><a href="https://sites.google.com/site/onlinedirectorysite/Home">https://sites.google.com/site/onlinedirectorysite/Home</a></td>
</tr>
<tr>
<td>Courts</td>
<td><a href="http://www.courts.ca.gov/courts/find.htm">http://www.courts.ca.gov/courts/find.htm</a></td>
</tr>
<tr>
<td>CA Superior Court</td>
<td></td>
</tr>
<tr>
<td>SF Superior Court</td>
<td></td>
</tr>
<tr>
<td>Genealogical Societies</td>
<td></td>
</tr>
<tr>
<td>Austin Family Assoc</td>
<td></td>
</tr>
<tr>
<td>CGSL</td>
<td><a href="http://www.cga.net/cga/contents.html">http://www.cga.net/cga/contents.html</a></td>
</tr>
<tr>
<td>Crandall Family Assoc</td>
<td></td>
</tr>
<tr>
<td>FGS</td>
<td><a href="http://www.fgs.org">http://www.fgs.org</a></td>
</tr>
<tr>
<td>Freer Low Family Assoc</td>
<td></td>
</tr>
<tr>
<td>German Genealogy Group</td>
<td></td>
</tr>
<tr>
<td>GSG</td>
<td><a href="http://www.genealogicalspeakersguild.org">http://www.genealogicalspeakersguild.org</a></td>
</tr>
<tr>
<td>Huguenot Hist Society</td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.huguenotstreet.org">http://www.huguenotstreet.org</a></td>
</tr>
</tbody>
</table>

**Pros:** easy to access; easy to use

**Cons:** difficult to organize; difficult to locate items (depending on your level of expertise using your word processor software)
If you use a spreadsheet there are several ways to go. You can make each worksheet in the workbook a different category (example A below) or you can use one worksheet and use columns A and B to hold the description of the link and the link itself. Make sure to add space between each category for ease of reading (example B below).

Example A: each worksheet is a different category.

Example B: One worksheet with 2 columns for each category. Each category is separated by some blank lines to make everything more readable. This is exactly like the word processing document in layout.

Pros: easy to access; easy to use
Cons: difficult to organize; difficult to locate items (depending on your level of expertise using your word processor software)
If you want to use a note taking application (e.g. Evernote or One Note) create a separate notebook called “My Research Toolbox.” Each note you add to the notebook holds all the links for one category. (See below) Evernote is free while One Note is bundled with MS Office.

**Pros:** most programs are free; easy to use; easy to search  
**Cons:** storage limits on free programs; web-only applications require Internet access
Another way to create and keep a toolbox is within Windows Explorer. Just create a folder called “My Research Toolbox” in the documents area of your hard drive. Within that folder create subfolders named for each of the categories you need. Within the subfolders store the appropriate links. (See below)

**Pros:** easy to access; easy to use  
**Cons:** not portable – tied to a specific computer

Adding links to folders initially requires a different technique.

First you need to add a new folder:

- Right click in a blank area of the Windows Explorer window (seen above).
- Click on New  
- Click on Folder  
- The new folder will appear and the words ‘New Folder’ highlighted. Type in the name of your new folder.

- Now open the folder you just created.
Next you need to add the new link (aka shortcut)

- Click on New
- Click on Shortcut

Either type in the link or copy and paste it from the URL line in your browser.

- Click ‘Next’
- Type in a name or description of the link.
- Click on ‘Finish’

You’ll now have a link to the webpage in your folder.
If you already have some bookmarks or favorites stored on your browser, and it’s working for you, just continue to use that method. Following up on Bob Richardson’s suggestion I created a ‘My Research Toolbox’ folder on my Favorites Bar. In order to do that I had to create the folder in ‘Favorites’ then drag it up to the ‘Favorites Bar.’ Once it’s there it works just like adding links to folders in Windows Explorer (as described on the previous 2 pages.) In this example I am using Internet Explorer as my browser but you can do the same thing in Chrome or Firefox.

**Pros**: easy to access; easy to use  
**Cons**: difficult to organize; difficult to locate items; not portable – tied to a specific computer
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Where do you find the links to add to your toolbox?

You probably already have some links to begin building your Research Toolbox. Note: If a link seems to apply to more than one category – add it to multiple categories.

- First add the links you’ve “bookmarked” or added to “favorites” on your browser.
- If you have handwritten lists of links or worse yet, lots of small notes with links written on them, get them transferred to your toolbox as the pieces of paper bubble to the surface on your desk.
- Use Cyndislist.com and pull of the links of sites you frequently use.
- Ask others to share their toolboxes with you – then copy useful links from them. [Thomas McEntee’s Research Toolbox (given with his permission) will be available in the member area of GSSWI.org under Intermediate Education.]
- Genealogical newsletters, online blogs and magazines often provide interesting links. If you find any of them useful to your research be sure to add them to your toolbox.
- Googling a topic will generally lead you to useful links. Add them to your toolbox.

Clearly you’ll be finding links all over the place. In order to maximize your use of your toolbox you need to open it as you begin to research. That way you can easily add the interesting links you discover right on the spot.

Special acknowledgement to Thomas MacEntee who’s webinar on this subject was invaluable!

Thomas MacEntee’s own Research Toolbox is also available on the GSSWI website in the members only section under Classes, Intermediate Class. It provides a good reference for the type of categories you might expect and he probably has quite a few links you could add to your own toolbox.