# Personal Archiving and the Genealogist

*by Susan Lukesh*

As genealogists poking around in archives and attics, we are reminded regularly how much we owe to casual notes, correspondence, and other artifacts of daily life — and to the often serendipitous survival of those items. In this age of increasing reliance on digital solutions for the development, presentation, and storage of research, we muse (and sometimes obsess) on what will become of our research one hundred years from now. I've yet to see a clear solution to this problem. Despite my early and continued use of computers in my research, as an archaeologist I know that paper (like parchment, clay disks, and animal skins), when properly preserved, lasts. Non-digital records fail slowly over time, leaving a document usually partially readable even if worn or faded, but digital records fail completely and at once, and recovery, if possible, requires great effort and expense.

This essay looks briefly at personal archives and digital archiving, presents current established recommendations, and adds some new thoughts to assist the longevity of our research.

### Background

Genealogists and local historians need to be responsible for their universe of materials. Family archives have long been the foundation of public archives, and we need to recognize that the long-term preservation of our digital records needs more than the benign neglect that our ancestors' diaries, correspondence, and business papers received. When paper materials left in boxes or desk drawers are rediscovered they may have faded and become brittle, but they are readable. The box of disks or the hard drive on our computers will not be similarly accessible. Yet many of the recommendations for digital preservation anticipate continued and long-term active involvement and intervention — often impossible beyond the genealogist's lifetime.

### Preservation practices today

People now engaged in research generally recognize that doing nothing to safeguard their digital files is dangerous. Since it is rare to find someone who hasn't lost whole files and documents due to personal or technical failure, we all know we should back up our data on multiple devices. Back-ups, however, are not long-term archives, and are useful only as long as the software to open the records is available. Many people use their free email programs to store material as attachments. But the efforts of assembling and maintaining an email archive (made even more laborious when multiple email addresses are used) are significant. Other researchers use combinations of social media sites (Facebook, Flickr, Windows Live Spaces, YouTube, DropBox, and other cloud options). While these systems may continue for some time, *in perpetuity*, or even throughout our lifetimes, "forever" is never promised. Finally, some people save the computer, the operating system and the software that created the documents and, after progressing to a new model, store the older computers in the basement. While this addresses the need to keep all forms of digital records, no guarantee exists that these machines will boot up a century from

*Above: "National Archives. Washington, D.C., Nov. 22 [1939]. Another one of the spacious filing spaces in the National Archives: the Division of Commerce Department Archives." Library of Congress Prints and Photographs Division Washington, D.C.*

now or that our descendants will continue to value and provide the necessary physical storage for all these old computers.

### Library of Congress recommendations for personal archiving

The Library of Congress has a website devoted to personal archiving that offers advice on preserving digital photographs, digital audio, digital video, electronic mail, personal digital records, and even websites. The issue of digital media longevity is addressed, and the following guidelines are provided:

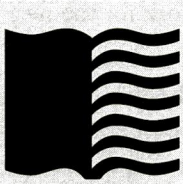
- Identify where materials are located.
- Determine which materials are important, organize them, and move them to appropriate storage venues (multiple copies, various media).
- Develop a list of these important records and locations.
- Check individual items once a year to make certain they are still accessible.
- Create new media copies every five years, or when necessary, to avoid data loss.

File names, tags, and metadata (providing both contextual and historical information), and a good directory/file folder structure are critical components of future access to these archives. Saving emails is heavily dependent on the specific email program(s). Similarly, saving websites is dependent on the website program, and whether individual pieces or entire web pages and sites will be saved — if that is even possible. Both activities are labor intensive.

The Library of Congress guidelines are excellent, yet leave two unresolved issues. The first is the considerable time involved in checking records in each digital format annually and creating new media copies every five years or as required. The second issue is how to ensure that records remain available for family members and other interested genealogists in the future, after the compiler's death.

### Assuring continued access

The issue of obsolescence can be addressed by the use of the Portable Document Format (PDF), a file format used to present documents independent of application software, hardware, and operating systems;[1] these files are expected to provide readability well into the future. PDFs allow documents created with different software (e.g., Word, Excel) to be organized within another document, and accessed without needing the software that created the original files. Using PDFs eliminates both the need for the original software and the necessity of media migration, as recommended by the Library of Congress guidelines, leaving simple transfer of PDF documents to new generation storage devices, if required.



LIBRARY OF CONGRESS

**HIGHLY RECOMMENDED**

The Library of Congress's Personal Archiving website is available at *www.digitalpreservation.gov/personalarchiving/index.html*. Other Library of Congress resources on digital preservation include: *The Library of Congress Digital Preservation Newsletter*, June issue found at *www.digitalpreservation.gov/news/newsletter/201206.pdf* and *The Signal: Digital Preservation Blog for Library of Congress*, a May 2012 blog posting at *http://blogs.loc.gov/digitalpreservation/2012/05/impermanence-and-digital-preservation*.

Many of us heavily invested in digital documents continue to routinely print and physically organize critical documents. This effort, of course, is an alternative or supplement to turning critical files into PDF documents. Such printed material, organized into three-ring binders or file folders, will continue to be readily available to future generations.

Once genealogists follow the recommendation that important documents (both digital and non-digital) be selected and organized in one or more PDFs (or easily accessible printed versions) and that a list of the full archive prepared, four options are proposed to address the issue of access after the family historian's death. All of these steps may be utilized, following the LOCKSS principle — "lots of copies keeps stuff safe." The first two options apply to both digital and paper records; the third addresses specifically data gathered for an individual family tree; and the fourth applies exclusively to PDF files.

1. The family historian prepares one or more family members to continue the stewardship of the family archives when the time comes. For some people, this may be an obvious step. For others,

this will not work for the near term, let alone the longer term.

2. Genealogists should investigate libraries and historical societies, especially in the same region as an ancestral home. A few websites discuss this option and offer model gift agreements.[2]

3. FamilySearch Family Tree,[3] currently in beta testing, is an online application that allows genealogists to collaborate with others to build, share, manage, and preserve family history online. Unlike separate trees created by different families, this application will provide access to one tree in which family relationships can be edited, people added, and sources attached. Although this product doesn't provide a place for all research, it will preserve a developed family tree with source material. The longevity of FamilySearch, a service provided by The Church of Jesus Christ of Latter-day Saints as part of their mission, seems more assured than commercial sites.

4. Although the longevity of cloud storage and commercial sites such as Ancestry.com, Dropbox, and Facebook, and other social media is not certain,[4] one website more likely to stand the test of time is the Internet Archive.[5] Founded in 1996 by Brewster Kahle to store snapshots of the web, today the Internet Archive has over 190 contributing institutions, including the Library of Congress and the Smithsonian. In addition to storing bimonthly pictures of the web, Internet Archive provides a place for institutions and individuals to upload content either in the public domain or owned by the uploading agent. Individuals contributing multiple documents can be assured that their documents will be retrieved together by use of specific tags and metadata. An excellent example of a personal contribution is "AK's Genealogy Blog Book," a book compiled from a research blog, with a pedigree file and other media, converted to PDF.[6]

### Digital executor

Complementing all four options is a concept that has developed recently, as digital assets replace tangible ones. The legal designation of a digital executor, who need not be the executor of the will, is a recent development.[7] While clearly of interest for researchers preserving family archives, the digital executor also plays a critical role regarding access to the digital information that may need attention online, on external storage devices, or on a computer's hard drive. This designation allows the family historian to document his/her wishes and make certain that survivors, through the digital executor, know how to obtain the digital assets. Whatever plans are made for accessing material for the long term, the digital executor will be able to retrieve material and even, if necessary, place it in the environments selected. So if you do not complete your own archive, your digital executor can — if the executor is given a full list of digital assets and passwords, plus your plans for these assets' disposition.

### Conclusion

While it is true that those who don't remember their past are doomed to repeat it, those who don't preserve their digital assets for future generations will surely forfeit the fruit of their labors. The options and steps outlined above can help assure that collected genealogical and historical research need not be gathered again. ◆

### Notes

[1] For more on this subject see Gary T. Wright, "Preserving Your Family History Records Digitally," *https://familysearch.org/techtips/2011/09/getting-started-digital-preservation* (accessed June 21, 2012).

[2] PARADIGM, "Guidelines for Creators of Personal Archives," *www.paradigm.ac.uk/workbook/appendices/guidelines.html* (accessed June 26, 2012), which includes a model gift agreement; the Oregon Historical Society offers "A Guide to Donating Your Personal or Family Papers to a Repository," prepared by the Society of American Archivists, *www.ohs.org/get-involved/upload/personal-records-donations.pdf* (accessed June 11, 2012); and the South Carolina Historical Society, "Placing Your Family Papers in a Manuscript and Archive Repository," *www.southcarolinahistoricalsociety.org/?page_id=391* (accessed June 11, 2012).

[3] More on the Family Tree can be found at *https://familysearch.org/help/self-help*.

[4] *http://blogs.loc.gov/digitalpreservation/2011/06/personal-archiving-in-the-cloud*

[5] The Internet Archive is working to prevent the Internet — a new medium with major historical significance — and other "born-digital" materials from disappearing. The collection includes PDFs of some earlier print-published material as well and is a useful resource for genealogists. See much more at *www.archive.org*.

[6] *http://ia601204.us.archive.org/31/items/AksGenealogyBlogBook/t13vfm04-book.pdf*.

[7] For more on the digital executor see *www.deathanddigitallegacy.com/2010/01/08/what-is-a-digital-executor* or *www.thedigitalbeyond.com/tag/digital-executor*.

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