

Revisiting Researchers & Correspondence

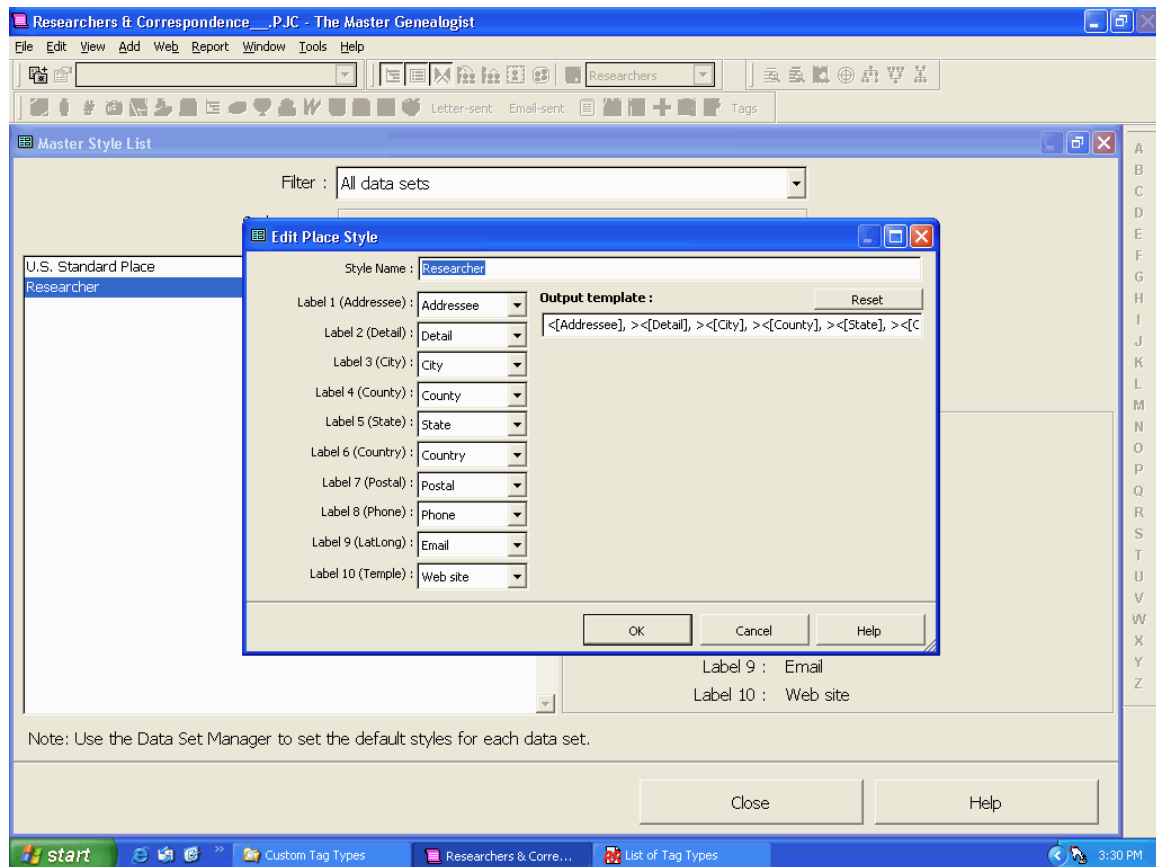
January 2009

Omaha TMG User Group

Back in October of 2004 I presented the topic of the Correspondence Log. This included how I kept track of all information coming and going from other researchers, including myself. At the time I kept it as a separate database within my dataset.

Here is a refresher of how that looked for those of you who don't have the handout anymore:

Here is a shot of the place style.

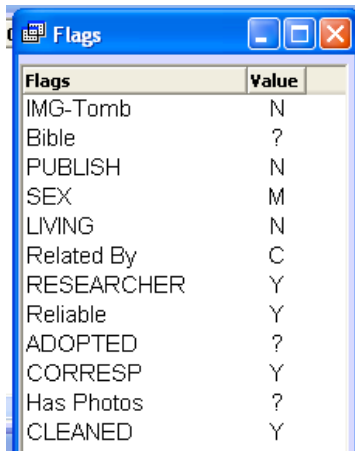


On the following page is a screen shot of the main detail.

I have since updated my methodology, which I will explain to you now.

Rather than try to maintain essentially two of each person (if they are a researcher, chances are about 99.9% that they are already in my main database, or they should be), I opted to combine the researchers dataset with my own main dataset. After merging the duplicates of the researchers in, cleaning up, etc. I still needed a way to notate that these particular individuals were not only people in my tree, but researchers.

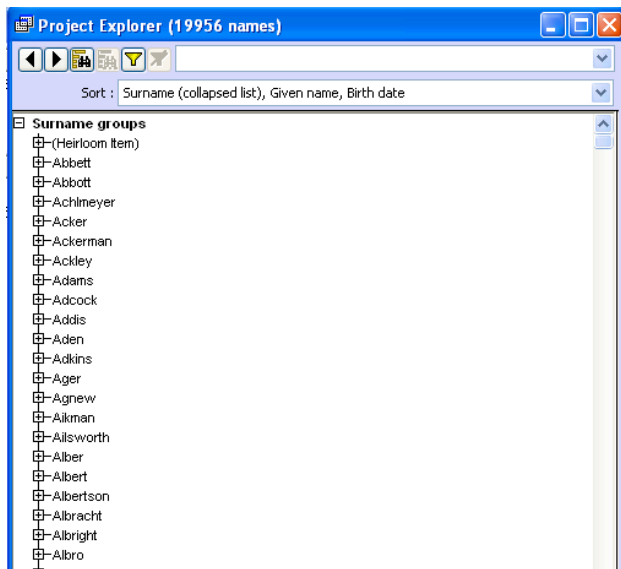
This is where the flags came in handy. First, I set up a Researcher flag with a simple yes (Y) or no (N) configuration. Then I also set up a Correspondent flag. Just because they are a researcher, doesn't mean that they have corresponded with you- or that you want to correspond with them! ☺ The last two flags are purely for my own interest, and not necessary to use for sorting. These are Reliable (Y or N), and Has Photos (Y or N). The Reliable flag is my way to see immediately what the reliability of the researcher is, and the Has Photos flag is self-explanatory.



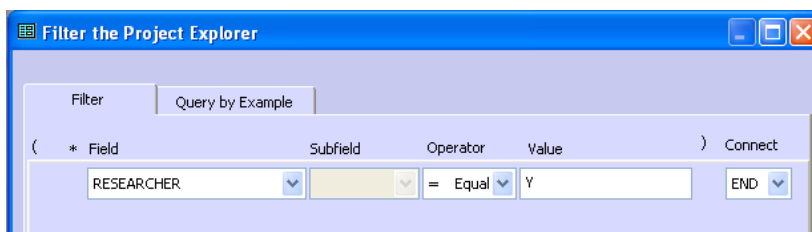
Flags	Value
IMG-Tomb	N
Bible	?
PUBLISH	N
SEX	M
LIVING	N
Related By	C
RESEARCHER	Y
Reliable	Y
ADOPTED	?
CORRESP	Y
Has Photos	?
CLEANED	Y

Now that I have all that in place, I want to make a focus group of these people so that when I am entering emails, etc. I can easily find them. So, I go to my least favorite window (and, it seems, the most error-prone) in TMG, the Project Explorer. I then filter it to show only those who are researchers.

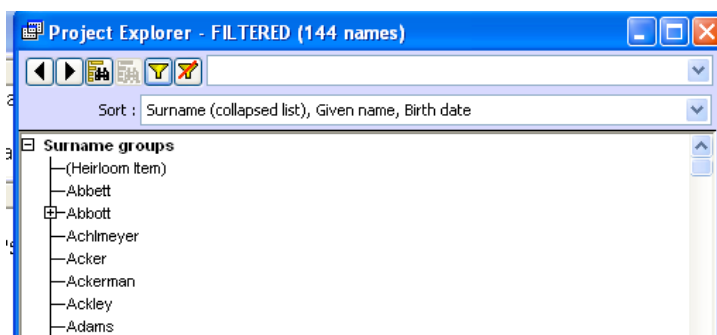
As you can see below, my Project Explorer is starting out with 19956 names, and obviously I don't want ALL those included in my focus group, so I have to filter this list.



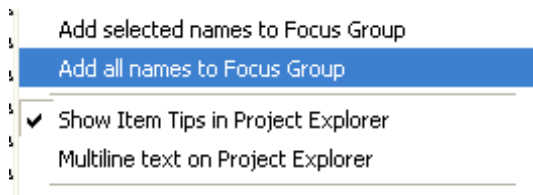
So, I apply my simple filter...



And here is my result, 144 names. Notice how only one of my names in this screen shot has a plus sign next to it? That is one of the 144 names. I know that seeing the others will make you nervous when I go into my next step.



Great! We have the Project Explorer filtered down to 144 people, but I personally don't like using the PE, and would rather utilize a focus group. So, right click on anyone in the filtered list-yes, even those who don't have a + sign next to them. You have a couple of options, which look like this:



Rather than trying to make sure I click on all the people who have the plus sign, I just choose Add all names to Focus Group. Even though you still see all the other names in your filtered project explorer, trust me, they won't all come along for the ride. Now, prior to running this step, it is a GREAT idea to open your Focus Group window and make sure that you don't already have a group in there. If you do, and you run this step, you will have your researchers mingled in with whatever group of people you were last working with. If there is a group open, just remove them all (unless you haven't saved the group, then do this first). Then run the Add all names step, and there is your group of researchers (144 names for mine). Just save it and give it a name that you will remember, and now you can easily go to anyone who is a researcher. If you add a new researcher to your database, you just have to run the Project Explorer steps again to add them to the Focus Group.

Pretty simple, huh? ☺

I have found that integrating the researchers and correspondence in this manner makes it less cumbersome for me.

With all that said, at the present I don't treat the emails as a source, which I am now rethinking. There was a discussion recently on the Wholly Genes forum about this topic, which has made me shift gears. Here it is in its entirety:

Original Post

citing e-mail sources - Wholly Genes Community

<http://www.whollygenes.com/forums201/index.php?showtopic=10873>[11/22/08 12:18:44 AM]

formerprof Post #1

A lot of the information in in my project has come in the form of e-mails sent to me by family members. So far I have cited them by date, sender & recipient. My e-mail files are becoming unwieldy and will have to be reorganized soon. I use Outlook as my e-mail client, which means that the messages can either be archived in Outlook-readable form or exported in a variety of formats -- Excel, Access, CSV and a few others.

How have others dealt with this? Would pasting the relevant e-mail text into the TMG citation memo field make sense? Is there a way of searching that data other than by looking at each citation individually?

I should probably get this done while there are still only a few dozen back-emails to deal with.

Any advice will be much appreciated.

Reply #1

GenerationGoneBy Post #2

I have an email tag where I copy the full text into the memo field of the tag. Attach it to the people mentioned, the person who sent it etc. Then I can delete it from outlook

Reply #2

Jane Neuman Post #3

Hmmm, I hadn't thought of that.

I think of the email as a source. I create a source and attach the email to the source and then cite it as usual. If the email is short, I just copy it into the notes section of the source.

If it is longer, I save it to a text file and attach that to the source as an exhibit. And ...

because I'm still attached to my paper ... I usually print it and file it too!

QUOTE (GenerationGoneBy @ 16 Nov 2008, 03:59 PM)

I have an email tag where I copy the full text into the memo field of the tag. Attach it to the people mentioned, the person who sent it etc. Then I can delete it from outlook

Reply #3

Michael Hannah Post #4

You will get a variety of replies, but my method both includes some of the e-mail in the citation, plus stores the full e-mail for future reference.

I include the smallest possible understandable extract of the e-mail in the Citation Memo [CM] that is relevant to that one specific citation. Different citations to the same e-mail will likely have different CM extracts. My custom source templates include the CM in both the FF and SF.

That way I don't wonder why I cited this e-mail to this tag. Then I make "My Files" as a Repository which I link to all these e-mail sources. Finally, I put in the Repository Reference (on the Source Definition Attachments tab) *where* I have stored my copy of the e-mail. If electronic it could be a filename and point to the pathname on either the hard-drive or the CD where the file is stored. If you wish to keep your e-mails electronic, I recommend exporting the e-mail as ASCII text files and storing them on CD. A specific program (like Outlook) may come and go, but ASCII has always been readable. My most significant e-mails I print out and the Repository Reference is to the file where that paper copy is stored. My custom Bibliography template for e-mail sources includes the Repository Reference element so I can find the full email if I need to. If I move where I store a particular e-mail, then I only have to change the Repository Reference for the source.

Hope this gives you ideas,

Michael

Reply from original poster

formerprof Post #5

Thank you, Teresa, Jane and Michael. I think Jane's plan fits my project best as I don't need a system quite as elaborate as that Michael suggested. I am adopting Michael's suggestion of an ASCII archive for the e-mails. That makes a lot of sense to me and

offers the further advantage that my periodic CD shipment of my TMG files to my eldest son can then include the e-mail archive as well.

Thank you all so much.

formerprof -- Robert