

Organize Your Genealogy: Less Piles to Better Files

by Jacquie Kriepps Schattner

Basics of A Good Organizing system

Simple – keep it to 2 or 3 levels, Works well with the way **you** do things, Flexible, Implement in stages
You can use consistently for a long time

One In-Box – For genealogy – simple start

Files or Binders or Both? Compare

What about both? Yes! Binders to tell the story – charts, photos, key documents, and stories

Usually kept by surname – four grandparents or eight gr-grandparents

Tip: Keep a direct decent chart in the back with BMD. Highlight each document you have

Files for everything else

Tip: One binder with pedigree chart numbering. On the front cover of binder. Tabs by number

Color code your family surnames? Four colors for grandparents: Database and file – manila? Use dots

File by Surname or place or Both? - Surname

Start with four grandparents' or eight gr-grandparents surnames (on pocket folder, hanging file or (binder) tab.

Separate manila folders/tabs for each generational head of household using male surname. (Father, Grandfather, Great Grandfather etc.)

Children of your direct ancestor- place behind or inside the direct ancestor's in age order. (Siblings, cousins, aunts/uncles)

One fuller file titled collateral, or siblings.

Order by generations from most recent to oldest, or the reverse. Creates a timeline.

Father's name unknown? Pencil file name: "Father of Lucien Mazoin" or "Parents of Lucien Mazoin." File documents that lead you to his name and documents of the known child, brothers and sisters.

Information on wife? File at end of her husbands until enough paperwork to get its own surname hanging file/tab.

At the end or beginning of your binder or files add: "pending" and another for "to be filed". (We'll discuss later.)

Create one File folder/Tab for each couple Tip: Capitalize surnames for easy reading

Binders Tabs Ideas

1) Color or clear tabs, 2) colored inserts or 3) vary ink color to distinguish direct ancestors from their children

Drop tabbed sheet into the archival sleeve and cut a slit for the tab.

Label both the cover and the spine

What about women who marry? Good Question!

File women under the name they are using at the time of the document. Birth – father's Death – husband's

OR (variation) File under surname/household as if it was a census year. (So male's birth is in their father's file.)

Child born to unmarried mother could be filed under mother or father depending on surname.

Women with multiple marriages and surnames may have several files. (Variation: if late marriage with no children, may file under previous husband's name.)

File by place

Hanging file or binder labeled by state or country and arranged in alphabetical order

Next are the manila folders/tabs in county* order

Next are folders labeled by either surname or record type (births, marriages deaths, cemeteries, censuses, wills) or by towns:

Illinois – Dunbar

Illinois, Henry County – Dunbar

Illinois, Henry County – Verbeck

Illinois-Marriages

Illinois, Cook County -Marriages

Illinois, Cook County- Wills

File by Record type

Least used system, but the advantage: multiple names on the same page, no copies.

Subjects include: birth, marriage, death, baptism, census, cemeteries, city directories, DNA, divorce, land, letters, immigration, military, miscellaneous, newspaper articles, obits, wills/probate.

File papers by surname (most common), place, or date

Combinations or variations

#1 Mostly surname, but for papers where many surnames appear one the same page a place file. Place-cemetery or Place – census. Helpful for families who lived in a smaller community or a county for many years.

#2 Surname plus place. If your research concentrates on one surname but families move: Jones-Illinois Jones-Ohio

#3 Break down places. Jones-Illinois, Cook County, Jones-Illinois, DuPage County. For those who live in Illinois, but not in those counties: Jones-Illinois

#4 Document files. Jones-Birth, Jones-Death

File project - First Time

Decide system, and purchase items from office supply store
Set up work area - Floor? Dining room table? Card table in your genealogy room?
Gather all your papers. Put in files by surname groupings (4 grandparents or 8 gr-grandparents.)
Label hanging or pocket files/tabs with surnames
One pile at a time, starting with the smallest pile, enter the information into your database until you've completed the pile.
If duplicates, eliminate all but one. Scan?
Do you want to keep the paper? Place in date order and file into your folders or binders.
Hints: 1) Background noise or not, 2) set a timer and do in short intervals.

File project – revising filing

Set up your work area – (see above) Buy supplies from office supply store.
Mentally plan how to revise/tweak your previous system
Pull out your previous filing one group (surname/place) at a time.
Label hanging/pocket files/tabs
One grouping at a time, starting with the smallest group, clear duplicates, eliminate all but one.
Throw out papers you no longer need. Consider tossing records free online at more than one website.
Scan?... if you have not already. Add new finds not already in your database.
Place in date order and file into your folders or binders.
Hints: 1) Background noise or not, 2) set a timer and do in short intervals.

Tip: Revising filing idea

Set up your new system and start to use it for all new documents
Get used to it, tweak it with new documents
Then revise your old documents to the new system - a little at a time.

New paper process

A page from your one in-box
Add information to your database
Scan or throw away
File appropriately OR add to one of two files "To Be Scanned" and "To Be Filed"

Whatever system you use, purposefully keep it up. After a little time it will be 2nd nature.

Computer Files

Same as your paper files? Answer: It's up to you!
On your computer – one genealogy file
Do you like to keep your photos separate? Two files.
Computer is similar to file

Inside your one genealogy folder – consider having folders:

Charts (for family tree charts may be under surnames)
Correspondence
Countries – general history
History – for background of family stores
Research trips – maps, to-do list
Surnames – your biggest folder - if you are a place filer you might use "Places" or Subject
Heirlooms
Photos (may be under surname)
Templates

File Naming

Use snipping tool, flash drive (color)

Simple, three step, most common: Obit for John Doe who died in 1950 in Chicago.

File names: Doe John 1950 obit
Doe John 1950 obit Chicago
1950 Doe John obit (you may be more likely to put into a surname file)

Surnames for Women (Yikes!)

Pick a naming pattern and stick to it. Maiden name or a combination of her married and maiden name. This may be different than your paper files. For Catherine Smith, who married John Doe:
Smith Doe Catherine 1956 obit (or) Doe Smith Catherine 1956 obit
Smith Catherine 1956 obit Chicago
1956 Smith Catherine obit (or) 1956 Doe Smith Catherine obit

Place: IL Cook Chicago Doe John 1950 obit (or) IL Cook Chicago 1950 Doe John obit

Record Type: Obit Doe John 1950 or Obit 1950 Doe John

Abbreviations (or a variation): B – Birth, M –Marriage, D-Death, CN – census, CY – cemetery, DV – Divorce, IM – immigration, LC – Legal criminal, LM – Letters, manuscripts, MC-Miscellaneous, ML-Military, NA-Newspaper articles, NO-Newspaper obits, PRP – Property, land records, WL-Wills and probate

File name for census: CN Doe John 1880

CN Doe John 1900

File name for obit: NO Doe John 1950

Why? Here's how your files will look if you are **consistent**: (Website can be added too) :

Doe John 1880 baptism (FS)

Doe John 1880 birth

Doe John 1902 marriage (Anc)

Doe John 1918 WWI reg (MyH)

Doe John 1942 family photo

Doe John 1950 obit Chicago

Pick your favorite and be **consistent**

Computer files

Choose your style, Be consistent, Small bites

Back-ups: 321 method (3 copies, 2 formats, 1 off-site)

(Home) Hard drive, flash drive, 2nd computer

(Away) Flash drive at different location, cloud-Backblaze, Carbonite, Dropbox

Family research databases - Retail programs keep family information on desktop: photos and scanned documents.

(PC) Family Tree Maker, Legacy, Rootsmagic (Mac) Reunion, FTM Mac 2, Heredis

Offsite: ancestry, FamilySearch, Myheritage

General organization

Evernote or OneNote: free-form information gathering and multi-user collaboration: notes, drawings, screen clippings.

Google "Evernote vs OneNote" for comparisons. Trello is an app.

Research Logs – examples online, keep from repeating work

"Heirlooms without a story is just stuff"

Genealogist tend to be the keepers of family items – give them value by recording their story Take photos

Shutterfly make a booklet: <http://seedstotree.blogspot.com/2020/05/pandemic-de-cluttering-and-heirloom-book.html>

Create an Heirloom Binder – paper or digital

Use a form to record the item's history

Lisa Louise Cooke's: https://lusalouisecooke.com/wp-content/uploads/2016/11/Heirloom_Example.pdf

Consider this information: Photo, Description including date, value \$ or sentimentally, History- who owned it, where,

Current location, Who inherits

One step further

Three or four items – about a dozen – while not emotional

Or leave a note with your will that your heirs should draw straws

Or just gift now it so you can enjoy seeing it in someone else's home

Photos without names are ... eventually trash

Paper – LABEL – even if it stays in one container

Getting started: sorting a box full

1) Order by family surname 2) Put each surname in relatively chronological order

3) Label name and approximate year on back with special pen* 4) Put in albums or photo boxes

(At a later date) Scan in order and save on computer

Computer - Separate file or not. Follow same file naming system, surname or record type (photos). Place?

Lecture handouts and notes One lecture spiral notebook –add an index

Handouts: Excel or word document/index with headings of : #, title, lecturer name, description, date

Number handout, add the information to your spread sheet

File in numeric order

If outdated – remove from file and index

Use Control F to find handouts you are looking for

Travel spiral notebook: pages for each city or archive you plan to visit. Each time you think of something you want to look up, write it down. Tear out the pages when you go there.

Genealogy travel: 1) Create an itinerary: choose repositories, cemeteries, people you want to visit 2) Research online for holdings and hours 3) Make appointments/contacts 4) Prepare information to bring – lists of what you have and want to find 5) Back up plan just in case

Genealogy travel packing list

Laptop/tablet, (cord) and it's travel bag (back up before you go)

Laptop lock, Paper, pens, notebook, Cellphone and charging cord, Flash drives – colorful, labeled, Flip pal and batteries

Portable charger, Places, addresses, phone numbers, open hours, Research information you want to find, what documents you want to look at, family information you already have, Fun things to do – restaurants, historical sites

Camera, Comfortable clothing and shoes, Maps, Change for photocopiers, Your business cards, Magnifying glass

Cemetery supplies like gloves, trowel, scissors, Inexpensive thank you's – check Pinterest for ideas

USB (or Flash) Drives

More colorful the better-OfficeMax

Color code them – photos red, documents green etc

Keep in one place – special container or box or drawer

Label the flash drive – 1) permanent marker, 2) cut a address label to size, 3)P-Touch label

Label can just give year, or other identifying word – photos

Number them, and keep a log

Label each by right click and a box will come up to rename

Put in the # or the year or subject

Snipping tool to paste the contents into a new word document.

Keep in number order in a file or binder and you'll know what's on it.

Date the page and update as you wish.

Goal - Ideas

Goal to give you inspiration and plenty of ideas, Pick your system, Little chunks of time, Stay consistent, Joy of extra time

Resources

Binders: <http://blog.dearmyrtle.com/search?q=binders> – Lots of information from ol'Myrt on binder filing

File folders: <http://www.genrootsorganizer.com/p/13-steps.html> - 13 step color coded system by Mary Hill

General:

<http://thesunburnedpenguin.com/what-to-do-with-all-those-genealogy-files/> - Rebekah Jones: the subject method of filing, look at the comments too

<http://thesunburnedpenguin.com/genealogy-organization-tutorial/> - Rebekah Jones blog. She uses an index too.

https://www.youtube.com/results?search_query=Genealogy+organization – many Youtube videos on organizing

<https://organizeyourfamilyhistory.com/> - Janine Adam's website, lots of ideas

The Organized Genealogist facebook group – many ideas daily

<https://www.familytreemagazine.com/freebie/family-tree-tips-23-secrets-organize-genealogy/>

Free download of 23 tips for organizing your family. Leans toward file folders

You tube>”Genealogy Folder System for a Mac” - 5 part video series by Ben Sayer at Genealogytools.com. Super easy instructions. A couple of years old, but still extremely good.

Cyndislist.com – Many ideas under “Organizing your research”

Books:

[Organize Your Genealogy](#) by Drew Smith

[The Organized Family Historian](#) by Ann Fleming

[Tracing Your Ancestors...Organize Your Genealogical Research](#) by Lisa Alzo

Chapter on organization in many general genealogy books