

Finding the right genealogical organizing system...

...that fits you and the way you think.

ASK YOURSELF THE FOLLOWING QUESTIONS:

- Am I just getting started in family history or do I have piles and piles of “stuff” (paper or computer) from past work? Alternate point to consider: I don’t know how much I have to deal with; I have never gathered it together.
- Most of the stuff that I have is: (rank in order of quantity)
 - ☐ Original documents and photos
 - ☐ Photocopied information
 - ☐ Digital Computer files
 - Are these files on floppy disks, CDs/DVDs, or your personal computer? DIGITIZE THEM—NOW!
 - ☐ “Things”—Memorabilia and family treasures
 - ☐ Genealogy files that I inherited or did in the past.
- Re-rank the above items in order of importance to you. Which things do you most care about? Which things to you feel need your most immediate attention?
- Do you **prefer** to work with paper documents or look at digital information on a computer?
- Are you comfortable using technology? (This doesn’t mean you are at a computer “geek” level☺)
- Do you maintain a personal genealogy management database (ie. RootsMagic, Legacy, Ancestral Quest, Family Treemaker etc.)?
- Do you have an online family tree other than FamilySearch?
- If you had to choose between organizing in binders with tabs and using file folders, which method would you choose?
- Are you good about filing your important papers?
- Are you good about keeping your computer files cleaned up? ARE YOU GOOD AT KEEPING YOUR COMPUTER FILES BACKED UP? Are your digital photo files organized?
- Which excites you more: adding another generation to your pedigree?
OR: Finding a photograph or story about an ancestor?
- What kind of space in your home will you be able to dedicate to family history? A small drawer? A file cabinet? A room?
- Does your brain think more in numerical, chronological or alphabetical terms?

EVERYONE NEEDS A HYBRID SYSTEM: You may think that you are more computer or paper inclined, but the fact of the matter is that there is generally a need for a hybrid system. Depending on your inclinations, the system will be weighted to one side of the equation or the other. At a minimum, all ORIGINAL documents and photographs need to be organized in folders or binders in an archival way.

GATHER FIRST!!: **Step one** in beginning family history is to gather the information you (and your family) already have. **Step one** in organizing your family history information is to the gather the information you (and your family) already have. See:

<https://www.preservingtime.org/gathering-the-stuff.html>

Step one in doing any research or further family history work is to gather the information you (and your family) already have...and **Step two** is to set up an organizing system. It is better to set up an organizing system in the beginning (or right now) and modify it later, than to plan on organizing at some point in the future. See: <https://www.preservingtime.org/save-the-box.html>

KEEP YOUR ANSWERS TO THE QUESTIONS IN MIND AS YOU CONSIDER THE FOLLOWING TIPS:

- **The most important tip I can give you is to keep your system simple and tailored to the “way your brain thinks”—chronological, alphabetical, location etc.. Set up your computer files in the same way you set up your paper files.**
- After gathering all information in one location (computer file and/or cardboard box), separate the information into manageable divisions. Separating by surnames, locations or different branches of the family would be an example of creating manageable divisions. The goal at this point is to contain the information, not evaluate or work with the information. I also recommend separating active and inactive/permanent files. As much as possible, only work with **one individual or one family at a time.**
- I strongly suggest creating a digital backup of all original documents and photos. If other family members have original material, make arrangements to scan their information also. <https://www.preservingtime.org/avoiding-digital-disasters.html>
- Use a pedigree chart as a map to your system. Pedigree charts and family group sheets are great places to take notes...print separate charts to be used for note taking and keep a clean one in your file.
- Make copies of original documents to take with you to a library or Family History Center...do not take original documents!
- Rely on paper to do the remembering for you. Keep notes about only one individual, one family, or one location per sheet of paper. I strongly recommend that you use 8 ½ by 11 inch paper for all that you do. Any sticky notes you use should only be for short term help in locating information. Take all notes in pen or on the computer—no pencil. Using forms or developing your own personal “rules” for note taking will help you organize your notes in a way that will be more understandable later. Many of the major online family history sites have made forms available for free in their learning centers.
- Make use of the snipping tool to capture information on the screen.
- Color coded labels or tabs and even binders can be helpful. Avoid using colored file folders; you will never end up with the right amount of the color you need.

- I use straight line filing with tabs on the front of the hanging folder. I use the position of the hanging file tab to indicate the status of the contents of the folder. Left hand tabs on folders that have not been dealt with yet and right hand tabs on folders I am working with or that are complete. I offset the tab on the folders for siblings of my direct ancestor by one notch.
- Print pages in landscape format and they will be easier to read while still in the file folder. If you have documents in portrait mode—give them a title along the 11” side of the paper.
- Add a file bar (from an old hanging folder) to a report cover for filing reference materials, pedigree maps or even your family files. See: <https://www.preservingtime.org/more-on-archiving--the-good-the-bad-and-the-terrible.html>
- Save images or copy and paste data to your computer. DO NOT RELY on just saving a link to the material. Keep a record of the sites you search and the results in your notes. This will help you remember which sites to return to and which were worthless. Give all computer files a descriptive name—AS YOU SAVE THE MATERIAL.
- Make use of the features in a genealogy management program to help you organize your information. I personally do not recommend using them to organize your digital media such as photographs and scanned documents. Copies of photographs or documents can be attached to your database.
- Don't be afraid to use the round file (garbage) to get rid of extra copies of information—especially duplicate copies of family group sheets (most programs print group sheets with a date on the bottom) and printouts of records found online.
- My internet shortcuts file is a big help to me in keeping organized. Creating a file is simple. Information on how to do this is available at : <https://www.preservingtime.org/personal-research-toolbox.html> Update: I use PreservingTime.org to track my sites in the Web-Site Project.
- Many websites including Ancestry.com, Fold3.com and FamilySearch.org have record citations that you can copy and paste. Save this along with the data or images that you save from these websites.

There is lots of information online about how different individuals have organized their family history work. Keep your answers to the questions and the tips above in mind as you investigate the specifics of different methods used by others. REMEMBER: KEEP IT SIMPLE!! (I have included links to my handouts on Organizing Photos and Digital Photo Files.) Here are a few links that I found helpful:

Organize Your Paper Files <http://www.fileyourpapers.com/>

Organizing Your Files: https://wiki.familysearch.org/en/Organizing_Your_Files

How I Organize My Genealogy: <http://www.youtube.com/watch?v=mrWf6VmKVCs&feature=related>

Organize and Preserve Original Documents:

<http://www.thefamilycurator.com/home/2010/1/26/organize-and-preserve-original-documents-used-in-your-geneal.html>

Clues to Identifying and Dating Photographs:

<http://www.preservingtime.org/clues-to-identifying-photos.html>

Photo Organization (including digital photo files):

<http://www.preservingtime.org/photo-organization.html>

A digital copy of this handout with live links: <http://www.preservingtime.org/organize-to-fit-the-way-you-think.html>