

Organizing Your Genealogical Files

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TCGS Mini Class

I. Traditional Organization

A. Folders or Binders?

1. Labels

a. By surname

b. By couple

(1) Documents are filed by surname chronologically

c. By event (original documents are added as they are acquired; you will need a good numbering system for this method to work effectively)

(1) Birth certificates/Baptismal or Christening certificates

(2) Marriage Certificates

(3) Death certificates

(4) Photos

(5) Miscellaneous

d. Kinds of Folders

(1) Couple or Family folders

(a) include all info for family members up to marriage of your direct ancestors

(b) include all info for siblings unless there is too much info, then separate into separate folder

(2) Correspondence

(3) Unknown relationship

(4) Locality folders

(a) Countries

(b) States

i) Counties

ii) Cities

2. Sources for traditional organizing articles and ideas

a. FamilySearch.org>Research Helps>Articles>Click "O" for Organize

(1) Organizing Your Genealogy Using Your Computer

(2) Organizing Your Paper Files

b. Cyndislist: Organizing Your Research lists many sites dealing with genealogy organization.

c. Genealogy.about.com

d. Ancestry.com's Learning Center

e. Books on Organizing

(1) *Organizing Your Family History Search* by Sharon deBartolo Carmack

(2) *Managing a Genealogical Project* by William Dollarhide

(3) *Organizing & Preserving Your Heirloom Documents* by Katherine Scott Sturdevant

(4) *Beyond Pedigrees - Organizing & Enhancing Your Work* by Beverly Whitaker

II. Digital Organization

A. Setting up your computer

1. Your computer system should match your paper filing system
2. Using My Documents (or Documents in Vista)
 - a. Create folders for each of your main surnames
 - b. Create folders for your areas of research
 - (1) Countries
 - (2) States
 - (a) Counties
 - (b) Cities
3. Create folder for your database management program(s) – PAF, RootsMagic, Legacy
 - a. Subfolders
 - (1) Databases
 - (2) Gedcoms
 - (3) Backups
 - (4) Reports
 - (5) Multimedia
4. Learn how to save census files and other digital files to your computer

B. Setting up your database management program

1. Set up database management program to find these subfolders
2. Learn how to attach these files to your database management program
3. Kinds of files to attach to your database management program (cannot do this in PAF)
 - a. Research Journals/logs
 - b. Transcribed Wills
 - c. Family Histories
 - d. Newspaper articles

III. Websites with good info on digital organization

- A. <http://genealogy.about.com/od/organization/a/digital.htm>
- B. <http://photography.about.com/od/organizingyourphotos/a/organizephotos.htm>
- C. <http://photography.about.com/od/organizingyourphotos/a/filingideas.htm>
- D. <http://genealogy.about.com/library/tips/bllabelphotos.htm>

IV. Researching

A. Use your computer for ALL research notes

1. Attach notes to your genealogy database
 - a. Research Logs
 - b. Correspondence Logs
 - c. Internet Research Logs or workbooks (see Cyndi's techniques below)

B. Saving images to your computer; throwing out the paper

1. MCL>HeritageQuest

- a. Download image to appropriate folder
 - (1) Surname folder (censuses, wills, etc)
 - (2) Multimedia folder in database management program file
 - (3) Maps and gazetteer info
 - (a) Location folders
 - (b) Place list in database management program (can't do in PAF)
 2. Ancestry.com image downloads
 3. Photos
 4. Miscellaneous other data gleaned from the web
- C. Cyndi Howells' web research techniques
1. Set a goal
 2. Establish a time limit (to avoid unstructured surfing)
 3. Open 3 computer programs as you begin working
 - a. Web browser
 - b. Email program (*depending on your computer configuration, this may no longer be necessary*)
 - c. Word processing program
 4. Keep a research workbook
 - a. Website title
 - b. Website address
 - c. Date of last revision on the web site
 - d. Date you visited it
 - e. Contact information for owner of site, including name, mailing address and email address
 - f. Surname you were searching on this website
 - g. Goal for searching this website
 - h. Comments or results
 - i. Ideas for future visits to this web site