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Disclaimer

Organization is personal choice

One method is not better than another

The BEST way to organize genealogical information is the one that works for you

We will explore several methods of organization to give you some ideas...

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Face Your Reality! How Much Space Can You Spare?

QUESTION 1: How much storage SPACE do you have?

- Do you have a lot of room to store family heirlooms, file boxes, or 3-ring binders?
- Do you plan to downsize or expand in the near future?

QUESTION 2: Are you a neat freak or comfortable with a little clutter?

QUESTION 3: Are you comfortable with technology?

QUESTION 4: When the time comes – how will you leave your research to your loved ones?

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Office Space Limitations

My Dream Office




My Actual Office



I have a very small office (8 x 8).

When my back starts hurting. My laptop and I move to the living room and I work from my recliner.

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I'm a Piler – Not a Filer

“If a cluttered desk is a sign of a cluttered mind, of what then, is an empty desk a sign?”
~Albert Einstein

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Why Should You Organize

- Protect valuable heirlooms
- Maximize your storage area
- Keep your workspace - workable
- Locate data when you need it
- Make your family happy that your genealogy is not spread around the house
- After your demise, your research and heirlooms can be passed on to descendants (or a repository) without loss of information



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When Should You Begin Organizing

NOW is the BEST time to begin organizing your genealogy....

- If you a beginner, you aren't overwhelmed with stacks of records yet
- You may have inherited photographs and genealogical materials that need to be incorporated into your work
- If you are preparing to move from paper storage to digital storage, it may be the best time relook your organizational system

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First Two Things to Accomplish

INTERVIEW people (relatives, neighbors, friends, etc.) who can tell you about any of your ancestors or the places they lived

HEIRLOOMS - inventory, take pictures of, properly store, and determine who should inherit family heirlooms in your care

- Don't leave this for others to decide
- Do this now while you can think it through
- You know the story about the heirloom better than anyone else. Write the heirloom's story and put it with the heirloom so it will be remembered by those that follow you
- Use archival storage materials (boxes, bags, etc.) for historical items



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How to Store Heirlooms

ARCHIVAL PRODUCTS should be used to protect fabrics (like quilts, dresses, etc.), old books and Bibles, papers, and historical photographs

- The National Archives (United Kingdom) provides an excellent description of archival products
<https://www.nationalarchives.gov.uk/documents/information-management/evaluating-archival-box-board.pdf>
- Standard plastics (including zip-lock bags) off-gas and are terrible for storing heirlooms
- Standard (non-archival) boxes are too acidic
- Archival products can be found on Amazon, art stores, and craft stores

I suggest visiting Denise Levenick, **The Family Curator**, for tips about preserving photos and keepsakes: <https://thefamilycurator.com/>

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Genealogy's Historic Organization System

The Pedigree Chart looks simple enough to create – but think about all the research it takes to create this chart.

You collect stories, books, documents, records, photographs, make notes and write stories to create this chart.



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Estimating storage for one family:

Fredrick Hillis Yeager's folder would contain:

- ? # personal files
- ? # family files
- ? # personal pictures
- ? # family pictures

Do I make a subfolder or separate folder for his wife and each of his 10 children?

Should I consider a separate folder for social history, genealogy, and geographic information?



Frederick Hillis YEAGER
1875-1925
BIRTH 25 NOV 1876 • Sprankle Mills, Jefferson, Pennsylvania
DEATH 24 JUN 1925 • Clearfield, Clearfield, Pennsylvania
great-grandfather

Facts

Age 0 — Birth
25 Nov 1876 • Sprankle Mills, Jefferson, Pennsylvania 14 Mezial

Age 1 — Birth of Sister Sarah Myrtle Yeager (1878-1) Abt. 1878 • Jefferson, Pennsylvania

Age 4 — Residence
1880 • Oliver, Jefferson, Pennsylvania

Age 4 — Residence
1880 • Oliver, Jefferson, Pennsylvania, USA

Age 4 — Birth of Brother Samuel L Yeager (1881-1886) Abt. 1881 • Sprankle Mills, Jefferson, Pennsylvania

Age 4 — Birth of Sister Clara Jeanetta Yeager (1881-1943) 1881 • Pennsylvania

Age 6 — Birth of Brother Daniel I Yeager (1883-1902) 02 May 1883 • Pennsylvania

Age 9 — Death of Brother Samuel L Yeager (1881-1886) 16 Aug 1886 • Sprankle Mills, Jefferson, Pennsylvania



Age 9 — Birth of Half-Sister Dora Mae Yeager (1886-1959) 29 Aug 1886 • Sprankle Mills, Jefferson, Pennsylvania

Age 9 — Death of Mother Barbara Ann LINGENFELTER (1855-1886) 21 Nov 1886 • Oliver, Jefferson, Pennsylvania, USA












Age 12 — Birth of Half-Brother Charles M Yeager (1889-1977) 06 Apr 1889 • Sprankle Mills, Jefferson, Pennsylvania

Family

Parents

-  **William Levi YEAGER** 1849-1893
-  **Barbara Ann LINGENFELTER** 1855-1896

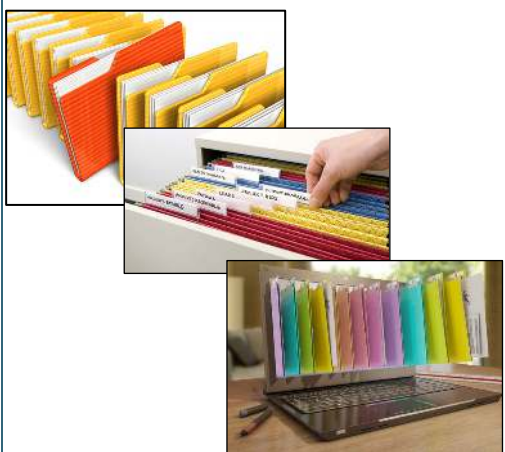
Spouse & Children

-  **Florence Vandalia BECK** 1871-1933
-  **Clifford Beck Yeager** 1897-1923
-  **Frances Lillian Yeager** 1899-1952
-  **Wallace Hillis YEAGER** 1901-1959
-  **Adam Levi Yeager** 1903-1975
-  **Margaret Jeanette Yeager** 1904-1905
-  **Darrell Lamont Yeager** 1906-1938
-  **Daniel Leroy Yeager** 1908-1927
-  **William Lynn Yeager** 1910-1962
-  **Paul Homer Yeager** 1912-1993
-  **Mary Avanel Yeager** 1914-2001

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Folders & Files

A folder is a type of storage space or container. Folders are designed to organized for organizing files.



A file is a collection of data stored in one unit. A file can contain documents, photos, audio, videos, correspondence, or many other types of data that will fit into a folder.



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Types of Files You May Have in a Folder

<ul style="list-style-type: none"> ➤ correspondence ➤ email addresses ➤ databases ➤ diaries & journals ➤ letters ➤ e-books ➤ bookmarks 	<ul style="list-style-type: none"> ➤ GEDCOM ➤ PDFs ➤ photographs (regular & digital) ➤ video & audio ➤ records <ul style="list-style-type: none"> ➤ Vital records ➤ Census, etc. 	<ul style="list-style-type: none"> ➤ reference materials ➤ research notes ➤ research plans ➤ research reports ➤ spreadsheets ➤ stories ➤ lots more...
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Some May Prefer to Log Their Documents

NAME / RELATIONSHIP	PATERNAL / MATERNAL	PROFILE INFO	ANCESTRY TREE	ANCESTRAL CHART	FAMILY GROUP RECORD	RESEARCH EXTRACTION

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Third Decision is... Storage

DIGITAL

or

ANALOG/PAPER

- Easily shared with others
- Files found with a search
- Information is in one place and accessible when required
- Easier to carry around a laptop than three-inch binders
- Need a consistent file naming system
- Need routine back-ups

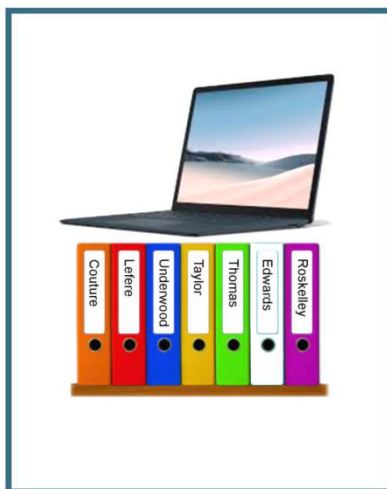


- Don't need passwords
- Don't need "back ups"
- Full binders are heavy
- Can takes many binders to cover a family
- Finding records can be difficult



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Most Use a Combination Plan



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Your Digital Filing Cabinet

Windows

- ◆ Use File Explorer (called Windows Explorer in older versions)
- ◆ Located under Start > Window Accessories
- ◆ My preference is to pin this icon to my Task Bar because I use it regularly



Apple

- ◆ Use Finder
- ◆ The Finder icon is in the Dock
- ◆ You can open a Finder window by clicking on the desktop



Rest of my presentation is based on Windows File Explorer

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4th DECISION – Your Organization Plan

Common organization plans focus on:

- Surname (family groups or individuals)
- Date (1700-1709 or 1801, 1802, 1803...)
- Color Coding
- Record Type (vital records, census, etc.)
- Location (town, city, county, or state)
- or a combination of plans



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Items to Consider...

- Do you have hardware & software to assist with your planning/implementation
- Write down your plan and rules and any changes you make for consistency
 - Will you group photos?
 - Which folder(s) will hold family photos?
 - Does the census record reside with the Head of Household, or place a copy for everyone named in the record?
- If your sources aren't cited – add citations as you organize.
- If you have more than one database (ex. one for paper, one for photos, one for documents) then use the same naming system for all. Example, organize by surname, locality, date, or record type, etc.
- Choose a small family branch to use as an experiment – verify that the plan will work for you.

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Mary Hills' Organizing Genealogical Files www.genrootsorganizer.com



Family History Files

Family Files Box:

- Tabs for 16 surnames of your great great grandparents.
- Right side - files for each of these families.
- Center section files for the brothers and sisters

Localities Box

- Information about counties, states, cemeteries, churches where you are doing research



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Colors to Follow Your Grandparents' Lines

How to color-code
 You have four grandparents. Assign each grandparent a color so you can keep them straight!

All the ancestors of one grandparent will be organized under the same color:

- Grandfather's lineage on your father's side: **BLUE**
- Grandmother's lineage on your father's side: **GREEN**
- Grandfather's lineage on your mother's side: **RED**
- Grandmother's lineage on your mother's side: **YELLOW**

4 Great Grandparents

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Can You Follow Mary Hill's Plan with Digital Filing? **Yes!**

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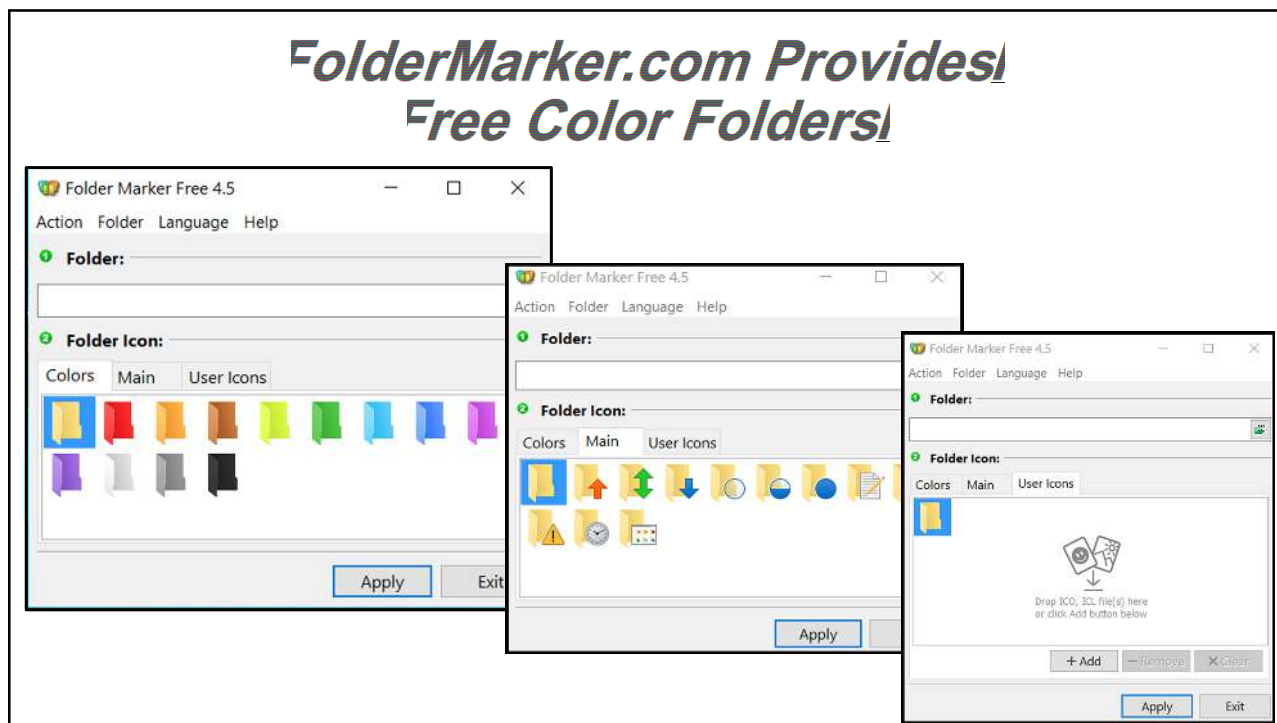
For Windows, You Need To Add a Program!

https://foldermarker.com/en/folder-marker-free/?AVGAFFILIATE=3305&__c=1



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FolderMarker.com Provides! Free Color Folders!



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Using Binders for Genealogy Files

- Binders have been used by genealogists for decades
- Within binders, tabs are set for individuals and/or families
- As information is found – it is added to the binder.
- Depending on family size and number of generations, many binders may be required.



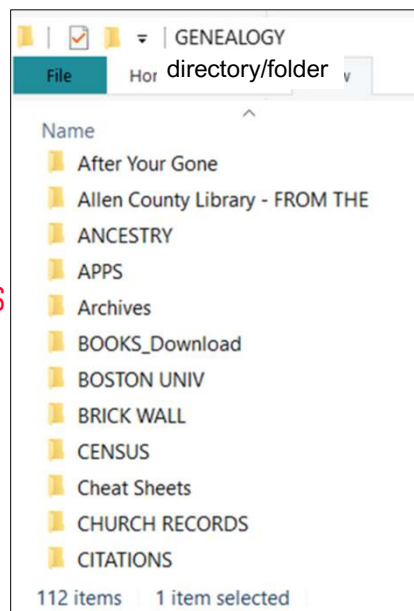
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“Folder” Naming Conventions (Analog or Digital)



- GENEALOGY FILES** (main folder/directory)
 - > CORRESPONDENCE (sub folders)
 - > DIGITAL BOOKS
 - >> Personal Scans
 - >> Pdfs
 - > DOCUMENTS
 - >> Census
 - >> Vital Records
 - >> Obits
 - > FAMILIES
 - >> Family & Friends
 - >> Official emails
 - > IMAGES/PHOTOGRAPHS
 - >> By date
 - >> By family groups
 - > STORIES
 - >> Family histories
 - >> Personal stories

Deb's Genealogy Folders



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Denise Levenick's File Naming System

4-Part Filename

surname-firstname_yyyymmdd_state-place_item.ext

Birth Certificate Digital Image

smith-john_18651105_wa-seattle_birth-cert.jpg

smith-john_1900_wa-seattle_us-census.pdf

Research Document

smith-family_research-notes.doc

Document Collection

JAS-1-1865

© Denise May Levenick, 2012

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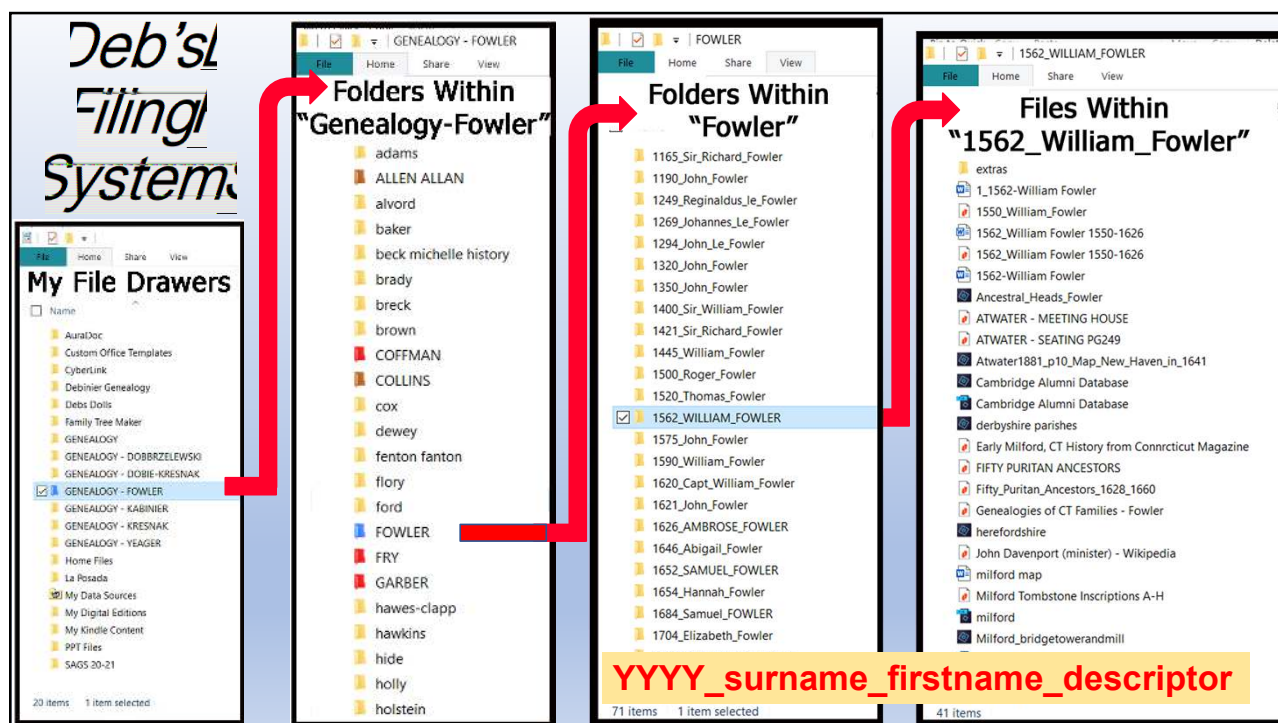
Deb's Genealogy File Naming Convention

YYYY_surname_firstname_descriptor

YYYY = birth year
 surname = use all capitals when a direct line ancestor
 firstname = capitals or not
 descriptor = free input field

Name	Date	Type	Size	Tags
1711_FOWLER_Samuel_story 1711-1771	9/1/2010 1:31 PM	PDF Document	97 KB	
1711_FOWLER_Samuel_birth_westfield	5/29/2013 5:37 PM	JPG File	3,190 KB	
1711_FOWLER_Samuel_family_MassachusettsTownVital	4/6/2012 6:49 PM	JPG File	33,734 KB	
1711_FOWLER_Samuel_MassachusettsTownandVitalRecords	11/21/2012 9:13 PM	JPG File	5,286 KB	
1711_FOWLER_Samuel_Memorial	11/21/2012 9:10 PM	JPG File	606 KB	
1711_FOWLER_Samuel_NOBLE_marriage	5/29/2013 8:24 PM	JPG File	3,337 KB	
1711_FOWLER_Samuel_story 1711-1771	9/1/2010 2:31 PM	Microsoft Word 97...	28 KB	
1758_Fowler_Eunice_MassTownandVitalRecords_birth	1/13/2013 6:25 PM	JPG File	6,996 KB	

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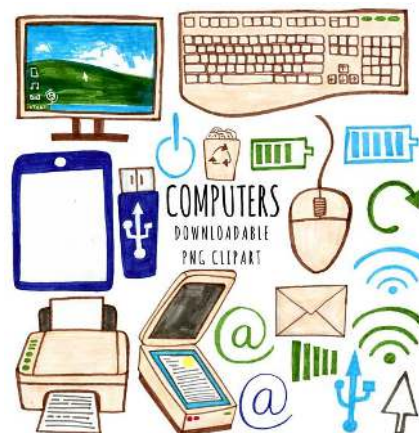
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Digitally Store Genealogy Files!

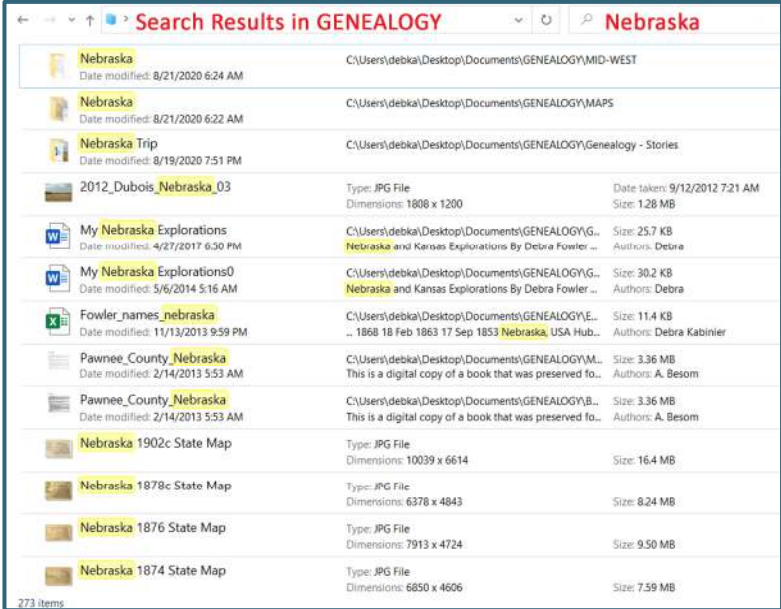
Organize the same way as paper systems. Usual choices are:

- Surname (family groups or individuals)
- Date (1700-1709 or 1801, 1802, 1803...)
- Color Coding
- Record Type (vital records, census, etc.)
- Location (town, city, county, or State)
- or combination of choices

Additionally, flexibility can be gained with digital filing...



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Digital Search Ability

Because of digital search capabilities:

- It doesn't matter where I store data – just that I have a good search term
- But it is easier to find information when it is maintained in a well-named folder


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Decide Rules on Naming Files

Decide Rules on Placing Files in Folders


Post the Rules

- ❖ Touch the file once – it saves time
- ❖ Set rules where family files will be placed. For example:
 - Family photos are placed in the Head of Household folder
 - Census files are placed in the Head of Household folder
 - Where does a married woman's files reside?
 - My rules are:
 - Direct female ancestor / important female ancestor – get their own folder
 - Otherwise, females are placed with their father's folder until she marries, files created with husband are placed in his folder.


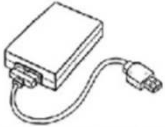



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Digital Files Must Be Routinely Backed-Up



TYPES OF DATA BACKUP METHODS






COMPUTER

EXTERNAL


CLOUD

Cloud Backup



VS

Cloud Storage




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My Digital Backup Plan

- I use a laptop and desktop. Each computer is a backup to the other
- Many choose to back-up computers on the 1st day of the month.
- My external drives hold more data than my largest hard drive. I choose Solid State Drives (SSD) for my computers and external drives. They cost more, but last longer and have less chance of breakage
- I store one external drive in a fire-proof safe and keep one accessible for quick back-ups
- I back-up to the Cloud every other night and Dropbox for selected folder back-ups
- I keep my software updated and data updated to current standards

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Sample External Drives!



SanDisk 1TB Ultra Dual Drive Luxe USB Type-C - SDDC4-1T00-G46

Price: **\$237.40 & FREE Shipping**

1TB **\$237.40**

128GB \$49.99, 256GB \$129.99, 512GB \$229.99

USB Flash Drive 1TB, Loyalgo Thumb Drive 1000GB, Metal Memory Stick Storing Photo/Video/Music/File with Keychain (Silver)

Price: **\$33.88 & FREE Shipping**

1TB **\$33.88**

Brand: Loyalgo, Color: 1000GB

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Cloud Storage & Issues!

Cloud Storage!

- Google Drive
- OneDrive
- DropBox
- Carbonite
- iDrive
- ...and many more

Cloud Issues!

- Security Issues (do you want all files on cloud)
- Privacy Issues
- You have access from any device
- What are space limitations
- Maintain a backup copy

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Storage Reminders

Heirlooms, documents, and photographs must be protected from heat, light, and humidity.

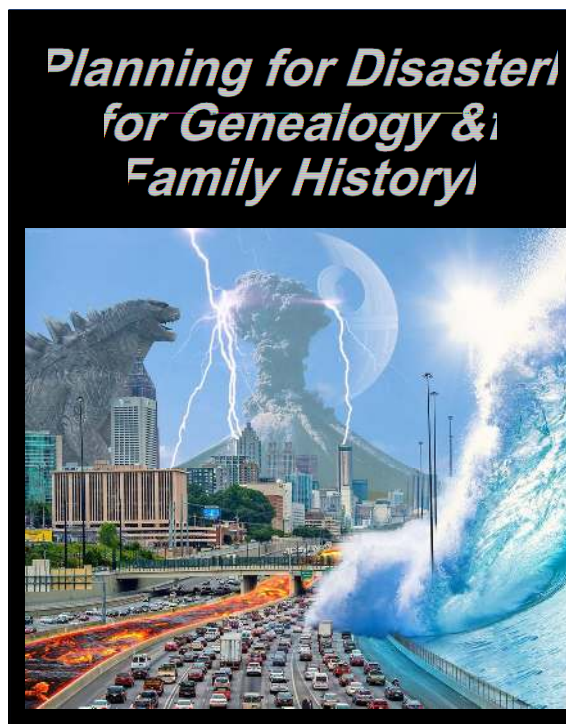
- Do not store in an attic, garage, or along an outside wall
- Do not laminate
- Do not use PVC sheet protectors
- Only use archival quality storage boxes and storage materials
- Newspapers must be stored separately from other papers due to the acidity of the paper

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Organization Reminders

- Take an inventory of your heirlooms
- If your documents & pictures do not have a citation – find or create the citation before filing
- Make your plan for naming your genealogy files and follow it
- File your genealogy files & heirlooms in archival safe containers
- Set your back-up schedule and follow it
- **AND.. Determine how those you trust will gain access to your genealogy files (passwords)???**

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1. Natural Disaster

- Could you take your genealogy work with you?
- Could your work be easily recovered?

2. Who inherits your work when you stop working on genealogy or pass on?

- Will they be able to gain access to your work / know your passwords?
- Will they understand what your files mean?
- Will your folders & files make sense?
- What will be your legacy?
 - Crazy Aunt Mary/Uncle Bill left us with a mishmash of pictures and papers.
 - Thanks to Aunt Mary/Uncle Bill, we have a wonderful understanding of our ancestors.

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Inform Your Family / Friends of Your Wishes

1. You have been doing genealogy work not only for yourself – but for your family.
2. Explain to your family what should happen with your research when you pass.
3. Determine who is willing to take over your work? Inform those handling your estate of this so your genealogy is not thrown out.
4. Perhaps you could mentor interested family members while you can.
 - Technology gives this ability that wasn't available a few years ago. You no longer need to wait for a face-to-face visit.



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- ❖ Do your research NOW to determine the archive or society that wants your research
- ❖ Determine the format the archive / society expects to receive your data
- ❖ It is your responsibility to ensure your research is in the format a facility will receive it.
 - **NOTE:** Don't expect those executing your wishes to go to the same level of detail you would or understand genealogy

***What if You Don't
Have a Family?
- or -
What if Your Family
Is Not Interested?***



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Make A Genealogical Directive

Include a **Genealogical Directive** with your Last Will and Testament:

- Specify what materials and research will go to whom and where
- Lisa Louise Cooke has a form on-line
- The Green Valley-Sahuarita Genealogy Library also has a form that can be copied

Genealogical Materials Directive	
Owner / Researcher Name:	_____
Address:	_____
Directive Date:	_____
Primary Recipient & Caretaker of Your Materials:	_____
Address:	_____
Phone Number:	_____
MATERIALS DESCRIPTION	
Description of Genealogical Materials (Overview):	_____

Specific Descriptions (<i>if applicable</i>):	
Photographs:	_____
Computer Files:	_____

<http://www.lisalouisecooke.com/directive.pdf>

© Lisa Louise Cooke 2008

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**When Will
You Begin
Organizing
Your
Genealogy?**



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Sources for Organization

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<https://www.cyndislist.com/organizing>

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Smith, Drew, ***Organize Your Genealogy: Strategies and Solutions for Every Researcher***, 2016

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