Organizing Genealogical Materials and Information

Thoughts, Notes, Comments – Whatever

Organization starts in the mind. How do you think about your genealogy stuff? How do you see it? Do you see it on a family, person, line, time period, or place basis.

What to organize? Genealogy stuff can include many things. Your genealogy materials may be limited to a notebook or two or it may have expanded to fill at least one room in your house. It can consist of loose notes and files, three ring binders, files in a file cabinet, books, magazines / journals, pictures, copies of records, maps, memorabilia such as military medals and family keepsakes.

There is no one system that is the best for everyone. We each think differently about our genealogy so the best organizational system for us is one that matches our individual way of thinking. There are, however, several systems worth looking at to see if they might be a good fit for you.

Some people arrange records by place and then by record type and final by date or alphabetically by person to whom the record pertains. For example: all Ramsey County records would be together, then broken down by birth, marriage, death record types and then by date and or person.

Another approach is to gather all records of a type together and then divide them up by place, date or person. So all birth records would be together and then arranged by County, date or person . Likewise, for all marriage and death records.

Some people like to have files color coded by ancestral line. So all of their maternal grandmother's line material would be red and their paternal grandmother's line would be blue, and so on.

The approach I use is to arrange files by couples alphabetically by last name. So all of the Rices would be arranged in order of the first name of the male head-of-household. Records of their children are included with the parents until they marry. Then that person become one of a couple in their own couple file. There may be separate folders within the parents folder for non-ancestors who have had a bit more research done on them. These couple files are then grouped in major divisions such as my own line, my wife's line and the line of my now ex-son-in-law which is there because he is the father of my grandchildren. I then have a couple of separate groups of files for topics such as places where I have folders with information about a place my ancestors lived such as maps, historical information, pictures etc. I have folders about genealogy repositories such as major libraries and societies, folders about historical topics of interest such as the civil war.

Your genealogy information on your computer also needs to be organized. You may want to organize it in parallel to your physical files. That is, in my case, by couple. However within that you should consider taking advantage of the ease of creating a hierarchy of folders on the computer. For example I may have a file for Archibald Hipditch and his wife Patience Verily with sub-files labeled "census images", "other records," "other images," "correspondence," "notes," ect.

For my client work I have a folder for each client. Within that are folder labeled "administration" where I keep time sheets, invoices, reports and the like, a folder labeled "census images," another labeled "other images," another called "maps and histories,' and sometimes one labeled "TMG" if I have used my database program to enter and organize data for producing charts. If I have followed several lines, I will have sub-groups of files for each line.

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Bookmarks are another computer element that needs organizing. By having them organized you can easily return to places on the Internet that you visited before and found useful. Again setting up a hierarchy of folders can help. For example I have a folder titled "Genealogy" and under that a folder labeled "Countries" and under that entries for various countries and under some of them further folders for example for provinces of Canada, for major repositories, for articles on how to do research in that country, for maps, and for articles on how to do research in that place.

Photos and other images are yet another category of items that need organizing. If you dealing with actual photos, you are in another situation where you need to set up a system. For instance arranging photos by family, by time and or by place. Digital image can sometimes be easier to organize because in addition to a scheme of folders you can add tags, captions, descriptions and like information to the digital file which can then be read by a digital image organizing program such as Lightroom or Digikam.

Organization takes thought and time. Once the system has been designed, you need to place existing materials within the system and keep up using the system as you gather additional materials whether it be records, websites, photos etc.

No matter how good your organizing system, it is useless if it is not used.

Books:

Dollarhide, William. *Managing a Genealogical Project.* Baltimore: Genealogy Pub. Co., 1991.

Carmack, Sharon DeBartolo. *Organizing Your Family History Search*. Cincinnati: Betterway Books, 1999.

Fleming, Anne Carter. *The Organized family Historian: How to File, Manage, and Protect Your Genealogical Research and Heirlooms.* Nashville, Tennessee: Rutledge Hill Press, 2004

McClure, Rhonda R. *Portable Genealogists:* Boston: NEHGS, 2013.

Internet

The *FamilySearch* Wiki has several good articles on organizing your files at:
- "Organizing Your Files" https://wiki.familysearch.org/en/Organizing_Your_Files
- "Document as You Go" https://wiki.familysearch.org/en/Document_AS_YOU_GO! -Well-Organized_Files
- "Organize your genealogy" https://www.familysearch.org/wiki/en/Organize_Your_Genealogy

Cyndi's List: Organizing Your Research lists many sites dealing with genealogy organization. http://www.cyndislist.com/organize.htm

FamilyRoots Organizer explains genealogy organization and tools. http://www.123genealogy.com/organizer

"Genealogy Q&A: Genealogy File Organization" at familytreemagazine http://www.familytreemagazine.com/article/Now-What-File-Organization

"Organizing all the genealogy stuff" at *Genealogy's Star* http://genealogysstar.blogspot.com/2013/09/organizing-all-genealogy-stuff.html

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"From Chaos To C.A.L.M." Organizing digital photos:
http://www.rootsweb.ancestry.com/~cahfhc/Organizing%20Digital%20Photos%20for%20use%20in%20a%20Life%20Story%20Project.pdf

Research Logs in Genealogy Software: https://www.geneamusings.com/2011/11/research-logs-in-genealogy-software.html

"Tips for getting – and keeping – your genealogy organized" at Deseret News
http://tinyurl.com/pz7t5tb

Search You Tube, https://youtube.com using "genealogy Organizing" (without quotes) as the search term to get a links to many instructional videos on the topic.

"How I Use OneNote to Organize My Genealogy" at *Elyse's Genealogy Blog*
http://elysesgenealogyblog.com/how-i-use-onenote-to-organize-my-genealogy/

"Bento Is Dead, Long Live Zotero" an article on using Zotero for genealogy at *Voices from a Distant Past* http://voicesfromadistantpast.blogspot.com/2013/08/bento-is-dead-long-live-zotero.html

"Getting Organized" course notes at *American Ancestors:*
http://www.americanancestors.org/education/learning-resources/read/getting-organized

"Organizing Your Research," by Diana Smith at *Genealogy.com*
http://www.genealogy.com/27_smith.html

"Four Tried and True Systems for Organizing Genealogy Research," at *The Family Curator*
http://www.thefamilycurator.com/home/2010/7/9/four-tried-and-true-systems-for-organizing-genealogy-researc.html#.U_Tv5WMXNWK

"Zen and the Art of File and Folder Organization," at *How-To Geek*
http://www.howtogeek.com/howto/15677/zen-and-the-art-of-file-and-folder-organization/

Digikam, a great photo organizing and face recognition and tagging software. It is free and works on Mac, Windows and Linux. https://www.digikam.org

Bygones: a note-keeping system in computer database form. See examples of a Bygones Research Extract and Research Log forms in the handouts website.
https://genealogy.edu/moodle2/pluginfile.php/611/mod_page/content/7/Bygones%20Genealogy%20Software.exe