

## **GENTREK: Organize Your Research**

by **Dae Powell**

"**Organize??** What are you talking about? I let my genealogy software organize everything."

Indeed, it can help a lot, but everything? And just how organized is your computer? Are you able to find what you need quickly on it? Favourite places and bookmarks are a great help, but there is more. I'll get to these later on.



### **Some DON'TS**

**First**, don't keep little scraps of paper to remind you what to search next or where you found the last information on an ancestor. They get lost too easily. If you don't lose them, you can still forget why you wrote the information down in the first place. Transcribe the information to a Log, Research Calendar or the back of the genealogical charts to which the information pertains.

**Second**, shun boxes and boxes of sheets. I'm not talking linen or percale here. These papers are just larger scraps of paper with no order to them. A sensible organizational system is one where you AND your successor can quickly find the information you collected.

**Third**, avoid spiral notebooks. Usually file folders or 3-ring binders or a combination of the two work for organizing papers: correspondence (including printed e-mails), documents, notes, *etc.*

I'm sure we could list many more foibles of disorganization, but that would dwell on the negative. We have political leaders who handle that much better.

**TIP: Elimination is a super help. When you come across a new name, first try to eliminate it. This keeps the clutter down caused by non-linkable families and names. I have found some that will not go away and that they often later become part of the tree.**

### **Your Organizational Mindset**

Everyone has a mindset for organization. Aye, even I have one. While a young lad, I asked me Dad where I should put my things. In a sweeping stroke of brilliancy and simplicity he said, "Put them in the first place you will look for them later." All we have to do, then, is determine where that first place is, right? **THAT** is your Organizational Mindset.

For me, it is essential to keep together whatever I collect on any given person, or on any couple after marriage. These things may be filed with like documents on other family members or kept isolated, pertaining only to the one person/couple.

If you keep things in binders, you may want a separate binder or even a fireproof file to keep the pictures, old family papers, and birth and death certificates, diplomas, transcripts, marriage licenses, *etc.* It is convenient and safer to store these in archival (acid-free) sheet protectors, usually in binders labeled as "[Name] — Records" or "[Name] — Documents."

It is less expensive to buy sheet protectors in boxes of 50 or 100. You can get non-glare or diamond-clear. Be sure they say "archival," "acid-free" or "acid neutral."

You might keep a binder or set of binders full of archival sheet protectors. Dividers in the binders have the person's Ahnentafel number and name on tabs. Behind each divider, there are birth, death, and marriage certificates that confirm relationships, or whatever other documents are available to secure their place on the pedigree chart. Other records pertaining to the individuals are kept in a filing system (binders or folders). This is very handy if you are doing research for others, too.

The *Ahnentafel* system makes a good tool for labeling file folders or binder spines. This immediately tells you where the person (or couple) fits into the pedigree chart and to which family they belong. It helps place siblings' records into the context of their place in the family.

You might use different color binders or file folders for the 4 grandparent or 8 great-grandparent lines. So, all green folders or all green binders may mean the records inside belong to someone in your father's paternal lines while all red ones pertain to your father's maternal lines. Even though some of the people whose records are inside a green folder or binder are brothers, sisters or cousins, they still fall within that paternal extended family.

If you have gathered some things to be organized, sort out what you've collected — first according to the surname to which each item pertains. If it is a copy (not original document) such that you can write on it in pencil, you may want to write the surname or the individual's name in an upper corner to help file it.

Once you have things sorted by surname or by individual or couple, decide how you feel about either binders or folders. Both are workable systems of organization. [See Bibliography] You may prefer to keep key documents and proofs in folders, but keep research notes in binders you can take with you when you research. Think about how **YOU** work most efficiently and how **YOU** can find something quickly.

With multiple generations of the same surname in the same state, you may want to create different binders or folders for each generation or different binders or folders for different counties. It depends on what you find, how much you find, how large the family was, and whether you want to isolate siblings and parents into different storage compartments or keep them together.

**TIP: When you take documents out of their binders or folders to study them, mark where they came from so you can re-file them correctly. Alternatively, you can create an index to be able to find each one.**

Many use dividers with tabs or separate file folders for different categories of papers: cemetery or gravestone inscriptions, census records (in chronological order), land records, marriage records, military records, vital records, wills and probate, *etc.* This methodology keeps like records together in a family's binder.

Maybe you think best in terms of a person's name and want to keep together everything you find on one person. Then do it! What would you do with a document that pertains to several people in the same family? If they both have folders and you have one document, what do you do? Photocopy the document and file it under both names. Or you can save a little space (and money) by filing it under one and put a note in the file of the other to reference where the document is filed.

I favour the Surname approach because it is natural to me. My family seemed to move frequently, however, so I add the Date Range and the Location to the tabs. It is no trouble to see the "folder timeline" in my filing cabinet!

Deciding what organizing system will work best for you depends on the following factors:

1. how you think and how you would want to look for some fact in a hurry,
2. whether you could find things for each person better if they are kept together, yet separate from other people,
3. what kind of time you have for filing and cross-referencing,
4. what your budget allows for buying binders and book cases or file folders and cabinets or file boxes,
5. the amount of space you have to put all this stuff,
6. whether the system you devise is one you could maintain, given your time, inclination, and schedule.

Regardless of what system you decide on, you may change your mind if your system gets unwieldy or you discover a better way. Most of us try one thing and fine-tune it as we go. It might help to write down your plan, then and display it where you can refer to it. Try it with just one family to see if it works out for you. Talk to other genealogists to learn what works for them.

The main point is to figure out how you think. Where would you be inclined to look for a particular document when you want to find it? Under name, then location, then type of record? Under place, then name, then record? Talk about it aloud with yourself or a friend and see if you can work it out in your head or on paper to create **YOUR** best way of locating any given record fast.

## PC File Organization

Earlier I mentioned at the start there are ways to make finding things easier on your computer. I do it with Folders! No, I don't print out everything and put them in folders, for goodness sake. I create folders for the things I access most often on my computer. The nice thing about computers is that folders can contain other folders, which in turn . . . you get the idea.

Before folders, I relied heavily on Windows' **FIND**. **FIND** is good, but not really fast on a multi-gigabyte hard disk. **FIND** is for those things you don't use frequently. (Right-click on **Start**, then Left-click on **Find**.)

To create a folder from an existing one, you can Copy and Paste it. In Explorer, copy [**Ctrl+C**] on a folder. Then Click on the Desktop and paste [**Ctrl+V**]. Now you name it what you want, position it on the Desktop where you want it, and drag things into it by whatever category you've assigned it. You can delete what's in the Desktop folder, because it is a *copy* of what you have elsewhere.

Aye, there **is** a Genealogy Folder on my desktop. I has several folders within it: Software, Web Links, Tips, To Do Lists, and many individual files like Correspondence Log, Research Calendar and people's names cross-linked with their screen names. (Keeps this old sod from going completely batty.)

## Organizing Favorite Places

Organizing your "Faves" is crucial when you research on the Internet. Ease your lot, by dividing bookmarks into categories. To do that, set up folders, by category and then place the Faves in the folders as you run across them. And, aye, this can be done retrospectively with no difficulty as I'll soon show you.

I have organized my favourite places in a hierarchy, like this:

- Genealogy
  - General Resource
    - Archives
    - Historical Societies
    - Internet
    - Libraries
  - Localities
    - United States
      - California
      - Delaware
      - Pennsylvania
      - Texas
    - England
    - Ireland
    - Scotland
  - Primary Sources
  - Surnames
    - Surname 1
    - Surname 2
    - :
    - Last Surname

You can branch the hierarchy as you find sites that demand additional categorization. I have found that if you **start** with an organizational scheme, it is easier to **stay** organized. I drew mine on a paper bag from the grocer, waiting for checkout.

## Creating bookmark folders:

1. Click the **Favorites** button (near the top of AOL's screen)
2. Click **New** button at bottom of the popup window
3. Click **New Folder** instead of **New Favorite Place**
4. Type in the name you want for this folder and click the **OK** button

It is a good idea to save this file occasionally! (Click on **Save** button in Favorites window)

What do you do with the Favourite Places you already have scattered about? Use your mouse to drag them into their proper folders. With the **Shift** key you can drag a contiguous group. With the **Ctrl** key, you can "spot" tag individual Faves and drop them into a folder as a group, too. All done!

## A Comprehensive System of Organization

Although the following methods have been used for many years by many genealogists, remember that not all methods work for everyone. I only ask that you consider how these methods "could" help you in your research and organization. When you aren't comfortable with a system, you won't use it and the reasons for using it are defeated from the outset. You know your habits and preferences. Adopt the methods that are appropriate for your purposes.

The following system, not originated by me, has been found to work best when all four areas are combined:

1. **Original files**
2. **Surname files**
3. **Portable files**
4. **Computer files**

When creating or altering your system, avoid omitting any of these files. The reasons will become obvious as we progress.

**Original files:** master copies of the information you acquire. *Examples:* birth certificates, death certificates, marriage licenses, photographs, photocopies from secondary sources, correspondence, *etc.* These documents are not *AmEx*: they should never leave home!

**Surname files:** working copies of your original files, plus any notes on possible connections, ideas on which to follow up, *etc.* Take these to the courthouse, library or other repository with you.

**Portable files:** master information on **ALL** your ancestors and to go with you everywhere. *Examples:* family group sheets on all direct ancestors, all pedigree charts, and other quick-reference aids. Have you ever encountered a name that you "thought" was yours, but could not verify because you **didn't** have the information with you? I think we all have. It allows for serendipitous research, too.

**Computer files:** details and source information for individuals you are researching — not just blood relations, but spouses, children, ancestors of in-laws, and other relatives. It may even include "tentative" relations. This will not replace any of the above three files! There are places you cannot take your computer (even notebook-sized). **Original files** are the actual documents or copies. **Surname files** contain printed copies of the information in the original files (more detail than you would enter into your computer.) **Computer files** do provide a valuable resource for sharing information, and for organizing data. It's helpful in determining relationships — the connections can be made one by one. It's also useful to print out a Family Group Sheet or Pedigree Chart (or even create a GEDCOM file) to share with a relative or potential relative. Thus, each of these files has its own function; and used together they will keep your data in accessible, usable form!

Here are two wee bits of preparation to do before beginning on the files:

- Prepare a cascading pedigree chart showing all known ancestors. If you start with one of your children, you can avoid you and your spouse having the same identification numbers for different ancestors. (Aye, I've been there and done that, too.)
- Number the ancestors according to the "Ahnentafel" numbering system. The Ahnentafel system, by its nature, provides a unique number for each individual ancestor, while allowing you to easily see where there are gaps in your information by seeing which numbers you have not assigned. Pedigree Charts illustrate the principle of the father being twice the number of the child, and the mother 1 + the father's number.

Once you complete these tasks, you're ready to begin organizing your data.

## Original Files

One key to keeping your **Original Files** organized is having a system for identifying each family group to keep the data separate but accessible. With [PAF](#) and other software, it is done for you with the [MRIN](#). Keep these files by surname. For marriage records or information pertaining to the wife, you might keep two copies — one with her father's family, one with her husband. If you find that a particular file is bulging, separate them by generation, labeling each file with the identification numbers of the parents or the Ahnentafel numbers assigned above. This file also includes the abstracts of censuses, deeds, wills, and so forth that you have made. You should keep copies of the same documents in your Surname Files.

Take care of your precious Originals. Use good preservation methods for old documents and photos; handle them carefully; use acid-free paper for everything possible. Make copies of whatever material you think you may need to take along when researching. **DO NOT take along your originals!** Some people say, "I know where it came from. I can request another copy." Then we hear of courthouses that have lost records from a particular period or a fire or flood has destroyed everything; or laws change and those documents are no longer available to the public! So even if you know where a document was located, you may not be able to obtain another copy. Keep your originals safe!

## Surname Files

**Surname Files** are your working files. Arrange them by surname so that you find them quickly to take with you when you research a particular name. These files should each contain as much of the following as you have available for each surname:

1. **General Information:**

1. Pedigree Charts — for the surname
2. Ancestral Time Line — to ensure that your generations overlap properly, and to see at a glance which ancestors were at any given time
3. Correspondence Log and copies of correspondence

2. **Specific Information:** place your most recent generation at the front:

1. Family Group Sheet — with enough pages to include all children
2. Copies from Original File
3. Generation Dividers/Notes
4. Research Log — noting where have you checked and what have you found, so far

Take these files with you to do your research. Make your notes of "further research" or possible connections. Your originals are protected, but you have this handy reference available with all the detail on a given family.

## Portable Files

When researching, you need your **Surname Files** for the family or families you're planning to work on. What if you find someone for whom you don't have a file with you? You may intend to research only one particular line, but then discover that that family eludes you. Mayhaps another family turns up where you weren't expecting to find them. Without your **Portable File**, you could photocopy piles of documentation for unrelated individuals! The names and places seem right, but the family may be cousins or not even related to you!

The purpose of the **Portable File** is to enable you to take as much information with you to insure that a family you find is one you're researching. It should include your Family Group Sheets, Location Directory to verify you have ancestors in a particular area in which you've found records, Pedigree Charts, alphabetical listings of Surnames of Interest, and other Notes.

Family Group Sheets should contain the basic information (birth, marriage, death, burial) with dates and places. It is easier if you cross-reference everything by both surnames (husband's and wife's), so if you run across information on a Shirley POWELL, you don't have to remember whom she married to find her—she's right there among the **Ps**, along with all her POWELL ancestors.

## Computer Files

Remember to organize information and reference the sources for everything when taking information from documents to put into your computer program! On printed documents, the reader can often see the source indicated or see that it is a photocopy of a birth certificate, for example. In your computer documentation, cite your sources that out so later you will know quickly from whence the information came.

## Summary

Use this multiple file approach to organize your records and you have the data you need, where you need it, and when you need it. Next, determine a sequence of handling new data — for example, update your **Portable File**, then **Computer File**, then **Surname File**, then file appropriate records in the **Original File**. Now all your records will stay in sync, making them more valuable to you, and allowing you to use your research time more efficiently!

## Bibliography

First, some online freebies:

- If you want to use Binders:  
[Organizing with Binders](#)
- If you want to use Folders:  
[Organizing Paper Files](#)
- And a fine 32-page pamphlet on Genealogical Organization by Wayne R. Hinton:  
[Organizing Paper Genealogy Files](#)

## Notable Books

### 1. *Organizing Your Family History Search*

Author: **Sharon DeBartolo Carmack**  
Publisher: F & W Publications  
ISBN: 1558705112  
Binding: Paperback  
List Price: \$ 17.99

Experienced genealogist and popular lecturer Sharon Carmack provides a number of strategies for organizing genealogy records and for sharing information with others. She is outstanding. I highly recommended it for both beginners and professionals.

### 2. *Managing a Genealogical Project*

Author: **William Dollarhide**  
Publisher: Genealogical Publishing Company  
ISBN: 080631222X  
Binding: Paperback  
List Price: \$ 14.95

William Dollarhide shares his unique system of organization in this book, taking you from the preliminary stage of your research to the final presentation of your work as a report or a book. Learn how to manage a genealogical project with maximum ease and efficiency. It takes a bit of getting used to, but his system works.



3. ***Organizing & Preserving Your Heirloom Documents***

Author: **Katherine Scott Sturdevant**

Publisher: F & W Publications

ISBN: 155870597X

Binding: Paperback

List Price: \$ 21.99

This work focuses more on preservation than organisation of working genealogy files. Katherine Scott Sturdevant shows you how to organize, collect, and preserve diaries, papers, letters, and other memorabilia.

4. ***Beyond Pedigrees — Organizing & Enhancing Your Work***

Author: **Beverly DeLong Whitaker**

Publisher: Ancestry Publishing

ISBN: 0916489523

Binding: Paperback

List Price: \$ 12.95

This comprehensive book by Beverly DeLong Whitaker can put you on the road to organizational freedom with your genealogical records. It includes excellent tips for all levels of researchers.