Organizing Your Genealogy
by Diane Sinclair

The Paper Battle
- What happens when we are Unorganized
- Research progress is slow, inaccurate, misleading
- Security risk
- Difficult to maintain
- Takes up more space
- We feel defeated when we see it

Organization Plan
- Simplicity
- Consistency
- Flexibility
- Expandability
- Make it your own
- Stick to it

Types
Four types of Genealogy documents
- Charts & Forms (a.k.a. "the Family Tree")
- Documents
- Research
- Miscellaneous

"Family Tree"
- Papers: Pedigree Charts, Family Group Sheets; Optional: Descendant Charts, Ahnentafels, Surname List, Location List, Research Journal
- Tools: Binder (2" – 3"), Index tabs (5-cut because they are wider)
- 3 Sections – use and Index Tab to separate the sections
    1. Pedigree Charts
        - Sorted by generations
    2. Family Group Sheets – use remainder of Index Tabs
        - Sorted by Surname then Given Name
    3. Research Journal (optional: can place in its own binder)

Documents
- Papers: Birth, Marriage, Death, Divorce, Social Security Applications, Census, Land, Military, Obituaries, Interviews, Pictures, Books, Letters
- Tools: Binder (3" – 5"), box, or file cabinet; plastic sleeves (archival if desired), small adhesive labels, file folders (for the box or cabinet choice)
- Place the document inside a plastic sleeve
- No sorting necessary; (Optional) Separate by Surname or Category (i.e. Birth, Census, Military, etc); takes up more space; harder to maintain

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- Place a label with a unique record ID number on the sleeve of each item (reference this ID number in source citations in your database or on charts)
- Place in order by their unique ID number
- Start a new binder or folder when one gets full

Research
Subdivide into 2 sections
1. Research Journal for completed research
    - Place a summary report (the "Research Journal") at end of "Family Tree" binder or in its own binder
    - Sort the papers by ID # or start/close date
    - File all research papers and notes in folders in a cabinet or box
    - Label the folders in ranges of either the ID # or date
2. To Do (Task List) - Research to be done
    - Gather reports, notes, timelines etc for a specific individual, event, or goal
    - Sort by Surname then Given name
    - Place in an accordion folder or any container easy to carry

Miscellaneous
1. Research information like maps and histories; blank forms; repository information like addresses, times, fees, and procedures; society information
2. Store in folders
3. Sort alphabetically by subject matter (can group like subjects: Places, Repositories, Societies, How To's, Supplies

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Technical terms used
- **Folder** – a subsection of space on the hard drive to store like objects
- **File** – a single object such as an application, driver, document, photo, database
- **Database** – a type of file; an organized collection of information for a similar purpose
- **Default** – pre-programmed, pre-determined setting
- **Cloud** – practice of using a network of remote servers hosted on the internet to store, manage, and process data

Organizing Your Papers - Review
- "Family Tree"
- Records
- Research
- Miscellaneous

Software/Apps Organizing Digital Storage
- Software or Applications (Apps)
  - A set of instructions a PC device will follow to perform a specific task
  - Family Tree Maker
  - Legacy Family Tree
- Default folder & file setups
  - Created at time of software installation or when a tree is started (a.k.a. database)
  - Features are predefined capabilities like citing sources, tracking research & notes, linking to images located on the computer or in the cloud

Defaults & Customizing
Default
- Database = Family Tree, Research, and Misc. Notes
- Media = images of Record sources
Custom
- Family Tree = use the database, save in a Surname folder for storing multiple databases
- Records = use the default Media folder, if possible or create one
- Research = use database features or create a Journal and/or Tasks
- Misc = save information using a word processor or spread sheet

Customizing Folders and Files
- Plan your folder & file naming standards ahead of time and stick to that standard
- Pick something that is easy to view and understand
- Plan to include a folder for
  - Genealogy data – or use the database created by the software
  - Media – or use the Media folder created by the software
  - Research – database may provide area to take notes. Create a folder to store correspondence letters, interview questions and answers, brainstorming notes

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- – Miscellaneous – for storing analysis notes, maps, pictures, histories, templates/blank forms, etc
- File naming ideas
  - – Keep file name length as short as possible; limit the use of special characters used in the file name
  - – Recommend the use of a unique Doc ID #
    - Keep it short but allow for a large number of records; Use leading 0's for sorting
      - 00000 = doc ID # where 0 is any digit from 0-9
      - 99 = multiple pages for the same doc ID #, 9 is any digit from 0-9
  - – Parts to include in the file name; Decide the order and stick to it
    - ID # (SHOULD BE FIRST for sorting purposes)
    - Rec Date (YYYYMMDD or YYYY, whatever is available)
    - Rec Type (abbreviate when possible)
    - Ancestor's name (SURNAME Given)
    - OPTIONAL: Misc. information if needed, could be the author of a book, a page number in a directory, or the number of pages in a series of pages obtained, an event place (this section SHOULD go at the end)

Backups
Why? Things happen
- Device issues: lost/stollen, corruption/infected
- Human issues: mistakes
- Natural issues: fires, floods, mother nature
What? Type of Backup
- Daily/Weekly: done more often, usually when making changes, stored locally
- Monthly/Quarterly: done occasionally, stored remotely

How to perform Backups – Family Tree Maker
Working Directory
1. Open FTM > Select File menu > Backup…
2. Select Working directory > Click OK
3. Message that the backup is complete will display > Click OK
Custom Directory
1. Select Custom directory > Click Change button
2. Navigate to the storage location (on computer or in cloud) > Click OK > Click OK
3. Message that the backup is complete will display > Click OK

How to perform Backups – Legacy Family Tree
1. Select File Ribbon
2. Backup File
3. Make sure locations are desired
4. Click Backup
Tip

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Software usually backs up the database and the media folder only. Consider moving other Genealogy folders (Research & Miscellaneous) to the media folder.

Internet Apps & Storage

- Popular Internet Apps – Ancestry, FamilySearch, MyHeritage, etc
- Other Apps
  - Genealogy – make trees
  - Journaling, - track research
  - Task Lists, - future research
  - Citations – validate ancestry
  - Word Processor – notes & letters
  - Spreadsheet - analyzing
- Storage – backups, saving records (ie. Drop Box, OneDrive

<u>Recommendation</u>
One Central Tree, copy to other sites
<u>Recommendation</u>
Make sure Apps have ability to backup & restore, share, GEDcom file save

Conclusion

- Keep it Simple
- Keep it Consistent
- Keep it Expandable
- Keep it Flexible
- It is your own plan
- You can stick to it