

Organizing Your Genealogical Files

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Objectives of this session:

By the end of this session, attendees should be able to:

- Understand why it is important to be organized
- Distinguish between searching and browsing
- Use names, dates, locations, and other terms to organize information
- Handle paper documents appropriately
- Handle electronic documents appropriately

Why be organized?

- You are able to find the information you need with a minimum of time and effort.
- You lessen the risk of accidentally throwing out important paper documents or deleting important digital documents.
- You reduce costs by avoiding the purchase of access to information that you already have.
- You are less stressed and can think more clearly about your research.
- Other people are more likely to enjoy working with you on projects.

Designing your system of organizing:

- Your system should be simple.
- Your system should work well with everything else that you do and with the way in which you like to do it.
- Your system should be flexible.
- If you are currently very disorganized, your new system should be something that you can implement in stages.

Searching vs. browsing:

- Searching lets us find information when we know a word, term, or ID that we expect to be associated with the information.
- Browsing lets us find information when we are unsure what word, term, or ID to use for locating the information.
- Design your organizational systems so that they can be both searched and browsed.

Organizing and naming genealogical binders:

- Use different colors for major divisions of your ancestral lines (such as paternal vs maternal).
- To label the binders, use surnames.
- If the surname binder gets too large or if there are multiple unrelated families with the same surname, use separate binders and add locations and/or date ranges.
- For each color group of binders, alphabetize the binders.
- If you have more than one shelf available for binders, divide them according to ancestral lines.
- Within each surname binder, organize documents alphabetically by the first name of the individual, and for each individual, in chronological order.
- Use binder dividers to separate one individual from another and label the divider with the name of the individual.

Organizing and naming physical genealogical folders:

- For hanging folders, use different colors for major divisions of ancestral lines. Each hanging folder can contain all individual folders for individuals with the same surname. Within each color grouping, alphabetize the hanging folders by surname. To label the individual folders, use surnames, followed by first names. If there is more than one person with the same surname and first name, add middle initials, middle names, birth years, or geographic locations.
- If a document pertains to more than one individual, make multiple copies and file each copy with the appropriate individual's binder or folder.

Organizing and naming digital genealogical files and folders:

- Create a folder for each surname but add additional words such as location to the folder name if you have more than one unrelated set of ancestors with the same surname.
- Within each surname subfolder, create additional subfolders for each individual (surname first, then the first name).
- To name individual files, use words that will assist with browsing, such as names, years, event types, and document type.
- Use the surname first, followed by the first name.
- Example: Smith_George_1999_death_certificate
- If you have more than one individual with the same surname and first name, add a middle initial, middle name, birth year, or geographic location.
- If you have named the individual files correctly, the files will automatically sort in chronological order.
- If a file pertains to more than one person, make copies and name each copy for the individual of interest, then file appropriately.

Handling paper documents:

- Scan any document that cannot be easily reproduced.
- If you prefer to work with paper on a regular basis, print a copy of the document to keep in your physical folder or binder.
- Store all originals in archival-safe sleeves and boxes, and place in a cool, dark, dry storage area.
- Use acid-free label tape for the sleeves and boxes.

Handling electronic documents:

- Use a cloud-based file synchronization service, such as Dropbox, so that you will have access to your files from any of your devices.
- Use two different methods to back up files from your computer's hard drive: a cloud-based file storage service, such as Dropbox, and a cloud-based backup service, such as Backblaze.

For more information:

- Smith, Drew. *Organize Your Genealogy: Strategies and Solutions for Every Researcher*. Cincinnati, Ohio: Family Tree Books, 2016.