Genealogy Organizing Systems

Declutter before filing

It is a good idea to eliminate the unnecessary papers in your genealogy collection. Keep the family history documents you really need and dispose of the rest.

Remove duplicate copies of photos and keep the best version. Trash photocopies of census records. They are available online or on your computer if you downloaded them. Discard notes about a research problem that you have solved.

Recycle brochures or handouts you picked up that you will never use.

Eliminate more clutter by converting paper publications you receive to digital editions. Get digitized books instead of the print version, request your conference syllabus as a PDF or on disc, opt for the digital version of your society's newsletter, and order digital subscriptions to your favorite magazines.

If it would be a financial or practical burden to replace the item, consider it an original.

Hopefully you now have a manageable collection of papers. These are the paper files you want to organize and preserve.

Paper and Digital Filing Systems

Paper filing Systems

<u>Hanging file folders</u> can be color coded or use manila folders with labels written with a colored marker. File alphabetically by surname in filing cabinet or file box. Hanging file folders can hold more papers if using two or three inch expansions. They can hold papers of different sizes and shapes. Hanging file folders have open sides so papers could fall out.

<u>Pocket file jackets</u> can be color coded or use manila folders with labels written with a colored marker. File alphabetically by surname in filing cabinet or file box. Pocket file folders can hold more papers if using expansions. Up to 5 ¼" expansions are available. The folders can hold papers of different sizes and shapes. Three sides are closed to prevent papers falling out.

Binders can be purchased in different colors for color coding. Sizes vary from ½" to 6". Use acid free sheet protectors in your binders. Extra wide binders are available. These binders have an extended cover for use with dividers.

Pocket Portfolios can also be color coded. They have multi pockets that come with up to 10 pages (20 pockets) with a spiral binding. These are good for smaller family histories. They are also good for keeping loose papers and notes during a research project. When finished, extract the valuable data and file them into the filing system of your choice. Then you can reuse the portfolio for another project.

Color Code Your Files
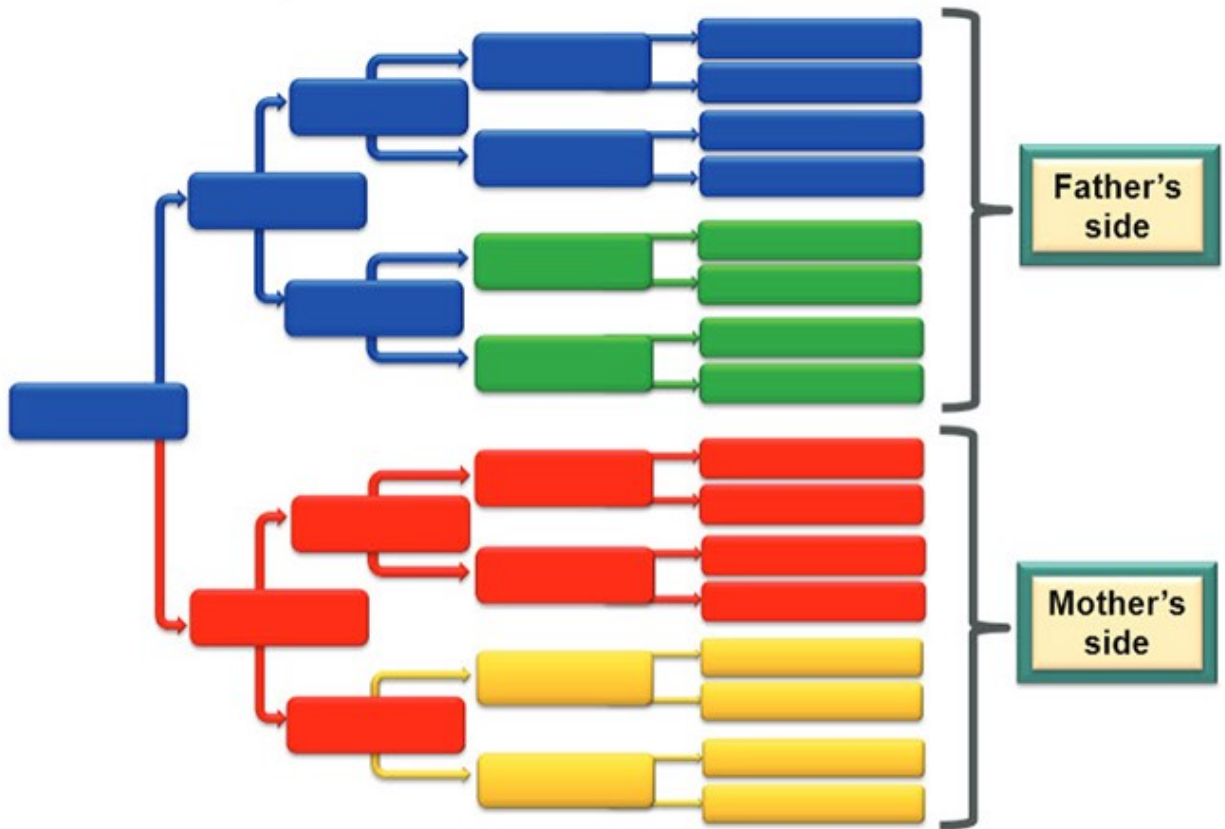
- A blue color to indicate your grandfather's relatives in your father's line;
- Green to indicate your grandmother's relatives in your father's line;
- Red to indicate your grandfather's relatives in your mother's line;
- Yellow to designate color your grandmother's relatives in your mother's line.
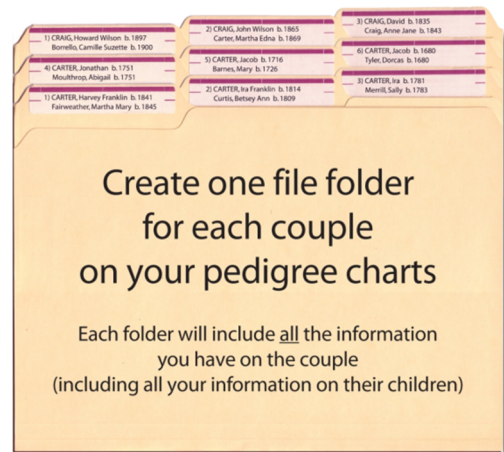
Paper Filing System – Organize content

You can organize files by surname, individuals, couples, or places.   Use labels on file folders and on the spine and cover of a 3-ring binder.

If you choose a folder for each individual, you will end up with lots of folders.

The most convenient filing system is by couples.

The label for each family should have the man's surname, his first name - the wife's surname then her first name. The surnames should be in CAPS.

Create one file folder
for each couple
on your pedigree charts

Each folder will include all the information
you have on the couple
(including all your information on their children)

For wives, all records before the marriage stay with the wife's parents' file. For children, all records stay with their parents file until marriage.

Include a family group sheet for easy reference.

For binders, use acid free sheet protectors with a plain sheet of acid free paper inserted as a divider. You can then file items in front and in back of the dividing paper.

For binders or wide bottomed file folders, place a tab divider to separate events, photos, vital records, etc.

Digital Filing System

You will need certain requirements for **creating digital files.** You will need:

- A computer with suitable software
- The resources to digitize physical records – convert them from paper to digital.
- The capability to preserve the digitized records for future generations and extended family.
- Access to the Internet if you plan to hare your digital records with others.

Scan physical record types using:

- A smartphone or tablet
- Photo or document scanning app
- Three-in-one printer
- Flatbed Scanner
- Mobile document scanner

Physical memorabilia to scan:

- Genealogies written in family Bibles
- Birth, marriage and death certificates
- Photographs
- Old letters
- Official military documents
- Journals, written and typed documents, oral histories
- Obituaries and newspaper clippings
- Funeral cards, etc.

After digitizing your family keepsakes, take care to place the originals in archival quality acid-free, lignin-free folders and boxes. Keep these containers where they'll be protected from light, dust, pests and handling.

Digital Filing System –**Organization**

Start on the desktop and create a master file. Right click on a blank space and select "New" then "Folder". Name your folder "Genealogy" or some other title of your choice.   Open the empty file and create a new file folder for each married couple. Name each folder in the following manner:

Man's surname, first name – wife's maiden name, first name

Use all CAPS for surnames. You can create sub file folders for each person in the family unit, or you can breakdown the folders by categories such as vital records, photos, census records, military records, etc.

Now enter your digital files in the correct folder or sub folder. You should use a consistent naming pattern. When naming digital files, include enough information so you can see what the file is.

Wedged File Naming Structure

Most common attribute   Most unique attribute

Who is this about? - What is this about? - What is the source/reference? - Anything else?

pelling-frank_1910_us-census_IL_Chicago_ancestry_jpeg

Omit special characters such as ! @ # $ % ^ & * ( ) [ ] ? / \ | < > , .

Avoid spaces and periods. When using a date as part of the filename, always use the year first.

Use underscores to separate major parts of the file name. Although most systems allow up to 260 characters for a file name, shorter is better. Use abbreviations to reduce the length of a file name.

- & in place of AND
- CEM for CEMETERY
- CERT for CERTIFICATE
- CO for COUNTY
- CP for COPY
- ENH for ENHANCED (This would apply to images that have been altered for clarity)
- PG for PAGE
- REC for RECORD
- REG for REGISTER
- TRANS for TRANSCRIPTION

Be consistent with your file naming, and once you're comfortable with a system, convert old filenames to your new system.

Save online material to your digital files. Is the material online copyrighted? Copyright law allows "fair use" of small parts of copyrighted works without the permission of the author.

If the reproduction is for the purpose of criticism, news reporting, teaching, or research, it is more likely to be fair use than if it is copied for commercial purposes.

So feel free to capture online material and add it to your digital files.

Screen-Grab Shortcut Cheat Sheet
For those documents that can't be grabbed as a PDF or downloaded otherwise.

	PC		Mac	
	Press all at once...	...then	Press all at once...	...then
Screen Grab Shot of entire screen	Windows + Print Screen (next to F12)	Paste (Command + V) into MS Word or other program (Only saves one grab at a time in the clipboard)	Command + Shift + 3	(Saves screen-grabs to the Desktop)
Screen-Shot of a Specific Window Shot of a specific window	Click the window you want to capture, OR Start menu > All Programs > Accessories > Snipping tool > Select type of snip	Alt + Print Screen (next to F12) Paste (Command + V) into MS Word or other program (Only saves one grab at a time in the clipboard)	Command + Shift + 4 +	Space Bar + Mouse Click (Saves screen-grabs to the Desktop)
Selection Grab Capture only part of a screen or window	Start menu > Snipping tool	Paste (Command + V) into MS Word or other program (Only saves one grab at a time in the clipboard)	Command + Shift + 4	(Saves screen-grabs to the Desktop)

Online material can include documents from genealogy web sites, excerpts from online books and web pages. Anything created digitally including email messages can be saved to your files.

After downloading or copying the file, make sure you create a file name using the naming structure shown above.

You can **save web pages as pdf's** using Internet enabled devices and a browser such as Chrome, Firefox and Safari. You can also highlight part of a web page. Right click on the highlighted section, chose "print" and the pdf option to save the highlighted section as a pdf file.

**PC—Print > Select Print to PDF (or similar)**

Mac—Print > Save as PDF...
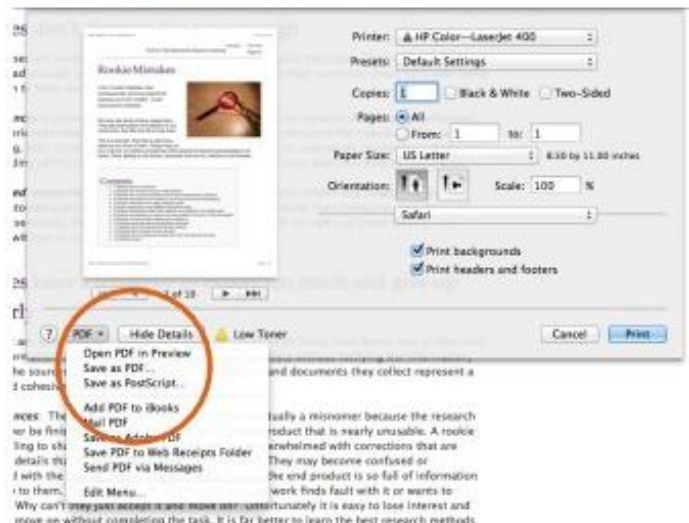
Save images from Ancestry by using the "save" button on the top right side of the image. You have several options. You can save the image to a person in your tree. The image will be attached to the selected person in your Ancestry tree. It will include the Ancestry record (transcription) and full citation. You can also save the image to your computer. This will create an offline image in your selected folder. Name the file using the file naming structure above.
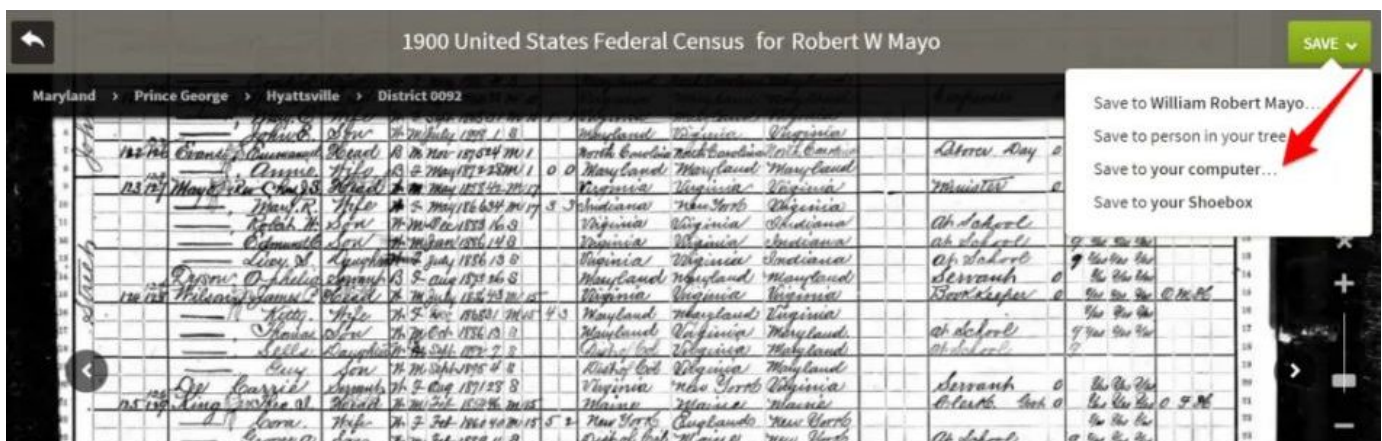
Facts, photos, and sources from a public tree may be viewed and added to other family trees on Ancestry.

If you want to copy a photo from someone else's tree to your computer, right click on the photo. On the left side of the screen, choose the download button. Open the file and click "save as". Here is where you choose the correct folder. Then name the file using the naming structure above.

RootsMagic genealogy software can synchronize with Ancestry.com. You can transfer people, events, notes, source citations and photos between trees. You will have an online tree and an offline tree that will mirror each other. Both platforms will have records that you have added to ancestors' profiles. You won't need to worry about creating a citation for each record from Ancestry. Ancestry does that for you. On RootsMagic, use the "TreeShare for Ancestry" feature to transfer people and their complete profile.
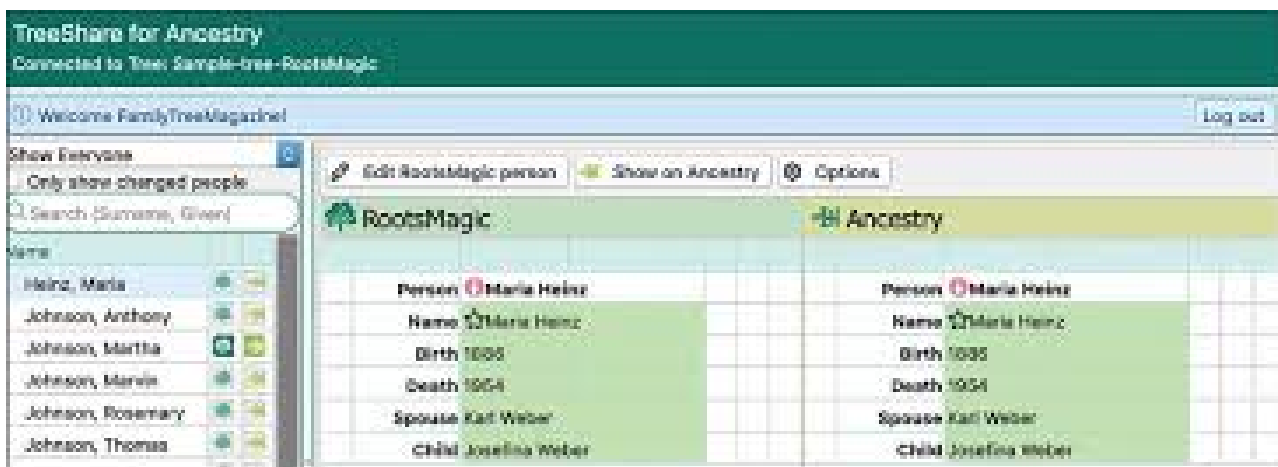
Don't forget to **back up your files.** You should back up your genealogy files somewhere other than on your own computer. This could include on CD-ROM or DVD. This could also include cloud backup such as IDrive, Backblaze, Dropbox, Google+ or a photo-sharing site such as Flickr.

If you cancel your subscription to Ancestry, you won't be able to view the record images on your tree. You will be able to view them if you saved them to your computer or if you transferred them via RootsMagic.