

Organizing Your Paper & Computer

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BASIC PREPARATION FOR PAPER FILES

The first step to getting organized is to have the right tools. At this point don't think about the documents, think about what you will need to achieve the task. Some of the items in the following list you probably already have. What you don't have, you will need to purchase before you start working with the documents you have gathered.

To begin with, you need to have on-hand a copy of your four or five generation Pedigree/Ancestry Chart. If you are already using a genealogy program, you can print it from the program. If you have not used one before, you can download one from www.ancestry.com or <http://FamilySearch.org>. Complete the form as far as you can. Hopefully, you will have enough information to identify your great-grandparents on both your mother's and father's side. This will help you understand the color coding process better. But don't worry, you can do this without all of that information.

ITEMS NEEDED TO SET UP YOUR FILING SYSTEM

1. Two file boxes - sturdy plastic boxes designed for use with hanging file folders with lids.
2. Colored letter size hanging file folders - with colored tabs in blue, green, red, yellow, with 1/5th cut.
3. Standard drab green letter size hanging file folders - with clear tabs, with 1/5th cut.
4. 50 manila folders with 1/3rd cut tabs, and reinforced tops. (Colored folders as listed above may be used.)
5. Labels for folders with permanent adhesive, with blue, green, red, yellow and white stripes on the top.
6. Colored dots blue, green, red, and yellow.
7. Highlighter pens - one each colored: blue, green, red, and yellow.
8. Felt tip pens with permanent ink and ultra fine point.
9. Pedigree Chart as identified above.
10. Binders - blue, green, red, yellow and divider sheets 1/5th cut.
11. Archival protector sheets.

SETUP FILE BOX 1

Step 1 - Pedigree Chart Color Coding

In the first file box, place a standard green hanging folder with one manila folder labeled Ancestry Charts. In this folder you will place a copy of all of your Pedigree/Ancestry Charts.

Using the first Pedigree Chart and the individual highlighters, color code the chart as follows:

Blue - You, your father, your father's father, your father's paternal grandparents, and his father's grandparents.

Green - Your father's mother, her parents, and grandparents.

Red - Your mother, her father, her paternal grandparents, and great-grandparents.

Yellow - Your mother's mother, her parents, and grandparents.

You will be using this colored Pedigree Chart to color code all of the surname files you will be working with.

Step 2 - Set Up 16 Hanging folders

Put four hanging folders of each color behind the Pedigree folder. That is four blue, four green, four red, and four yellow hanging folders. Place tabs and folder labels on the left.

Step 3 - Label Colored Surname Hanging Folders

Using your color coded Pedigree Chart, create blue labels with each of the four surnames of your ancestors from your father's father's side. Create green labels for each of the four surnames for your father's mother's ancestors. Create red labels for each of the four surnames for your mother's father's ancestors. Create yellow labels for each of the four surnames of your mother's mother's ancestors. Place the tabs on the left side of the appropriate colored hanging folders.

Make 16 copies of your Pedigree Chart and color four with the blue line, four with the green line, four with the red line and four with the yellow line. Put one of these individually colored copies in each of the corresponding colored hanging folders.

Step 4 - Color Label Manila Folders

Using the colored-strip file folder labels, create a label for each of your four great-grandfathers according to their color on the first chart you colored. Place these labels on manila folders with the tabs on the right. Write all surnames in caps, include their birth date, if multiple marriages for either person, include the number of marriage,

Example:

Colored Strip	
SMITH, John J.	b 1965
JONES, Sharon M.	b. 1967 M2

Putting the birth date on the label allows you to identify individuals who have the same name by birth date.

Step 5 - Filing the family folders

Group the manila folders by color and sorted by surname, then by first name and birth date.

Insert these folders in the appropriate colored folders by surname. Because you will have more in some colored hanging folders than in others. You may need to add additional hanging folders.

You should have all of your blue Jones's and red Smith's grouped in the individual surname folders together.

For information on working with Scandinavian, Asian, American Indian and Polynesian families, they should be filed by location by birth date. See <<http://familyrootsorganizer.com>> for tips and helps with Patronymics.

Step 6 - Documents in Family Folders

In each family folder place the appropriate Family Group Sheet for that family. If the person had more than one marriage with children, create a separate folder for that individual and add "M1" or "M2" behind their birth date on the label. Keep the records for both families separated.

Step 7 - Sorting your documents

Gather the documents you have found so far. Using four cardboard boxes, one for each of your for grandparents, color code and label these boxes by surname according to your color coded Pedigree Chart. Use another box for your research materials labeled Research. Use another box for documents relating to locations labeled Location. Place all original documents in another box labeled Originals.

You will be working one box at a time. Start with your father's father's side first, and work down the Pedigree Chart by color.

Separate the documents in each of the four colored boxes by surname, then by family group. Place the documents in the appropriate manila folder for each individual family. Place the manila folders in the appropriate colored hanging folder. Hold the original documents for last, as they will be placed in the Original Documents Binder.

As you are working with your research you will be adding your research log for that family, the time line for the individuals in the family, a to-do list, research notes, maps, and other documents pertaining only to that family.

Step 8 - Filing documents for children not your direct line ancestor

You will have documents on the siblings of your ancestors. Using the standard hanging folders, and the appropriate colored tabbed manila center tab file folders, create a folder for each of the children who married and had children. If they did not have children, their documents may remain in their parents folder unless that folder gets too full. File these folders by the child's birth order directly behind their parents. Put an appropriate colored dot on right-hand side of their folder to identify them as non-direct-line children.

SETUP FILE BOX 2

Step 1 - Setting up location folders

You have already sorted the location documents into the Location box. Now separate the documents in the location box by country, state, county and city/town.

Use the second storage file box for your location documents and maps. Use standard hanging file folders (not the colored ones). Create a tab for each state or country based on the documents you have. Place the title tab on the left side of the hanging folder. These will be the first folders in box 2.

Using the left tab manila folders, create a folder for each group of documents. Depending on the documents you have gathered so far, you will need to expand these folders as you are working in the future. Color code these folders with colored dots to reflect each surname group to which they apply.

Step 2 - Setting up reference folders

Within box 2 store the documents relating to how-to-do family history research. Create a standard hanging folder for groups of research topics such as: census, courthouse, military, adoption, library, DNA, websites, and the many other topics you will research. This will probably take several hanging folders. Place the folder tabs for reference topics on the right side of the hanging folders.

Create a right tabbed manila folder for each individual topic. Use plain white tabs for everything in this part of the box.

Step 3 - Setting unrelated same surname documents

When you have found information on a surname you are researching, but the information does not yet apply to your family, create a "HOLDING" standard hanging folder for those documents. Use the appropriate colored label for the manila folders. Use a colored hanging folder tab with the surname followed by the word "HOLDING" on it. Place the folder tabs for unrelated same surname documents in the center of the hanging folders directly behind the surname hanging folder. As you connect the people in these documents with your family, move them from this box to File Box 1, and sort them within the appropriate surname.

SETTING UP ORIGINAL DOCUMENTS BINDER(S)

It is important that all of your original documents are well maintained. Using a binder for each surname, you can create a safe place for these documents and have them readily available.

Following is the setup for one binder. This setup procedure applies to all four colored binders.

Step 1 - Label the binder

Start by creating a cover sheet for this binder. With the surname and the types of documents you place in the binder. The documents you will place in this folder are the birth, marriage, death, military, census, deed, will or any other vital or multiple family documents.

Step 2 - Create divider sheets

You will need a divider sheet for every type of document you have. Label the tabs on these divider sheets according to the type of documents to be filed behind the specific tab. You will be adding more divider sheets later.

Step 3 - Using archival protector sheets

Place each document in an archival protector sheet and file them behind the appropriately labeled tab. If the document is single-sided, place two single-sided documents within one protector sheet. If the document is double sided, or contains more than one sheet, place the entire document in one individual protector sheet.

Step 4 - Numbering the document

Each document should be numbered so you can reference it on the individual family group sheets you placed in the family surname box and within your computer program. In the example below, I have created binders tabs in order of birth, marriage, death, military, census, deed, will, etc. Order yours however is best for you.

Start each individual group with the first three letters of the surname the document applies to: i.e., Smi; Bro; Jon; Joh. This is followed by the first three letters of the document type; i.e.; Bir; Mar; Dea; Mil; Dee; Wil; etc. You may wish to alphabetize the tabs by document type, but realize that you will be adding more document types as you go, and the tabs will not remain in the location you first set-up.

The document number follows the surname identifier and document type. The numbers should be in ascending order, i.e.: 01, 02, 03, to 99. The documents will then appear as: SmiBir 01; SmiBir 02; SmiBir 03; etc., for each surname/document type.

Place these identifying document numbers in pencil on the front top of each document, and place a label on the outside of the protector sheet reflecting the document number(s) inside the sheet.

Record the document number on each family group sheet, and in your genealogy program in the source area. If you reference the document anywhere in your computer program, use this number to identify where the document is filed. Using this technique you only need one copy of any of the major documents you have located. This saves a lot of storage space, and if you have to take things with you, these are the first documents to be moved.

SETTING UP YOUR COMPUTER GENEALOGY FILES

Many of us have the same problem organizing files on our computer as we do with our paper files. Once you have the paper in order, it is much easier to organize the same documents in your computer.

Step 1 - Setting up computer folders for family

Start by creating a folder under Documents (or My Documents) for all of your family genealogy files. I would call this folder something like GENEALOGY-FAMILY.

Under the GENEALOGY-FAMILY folder, create a folder for each of your four major surnames. These are the same surnames used to establish your color coding in your paper files.

Under the GENEALOGY-FAMILY – SURNAME 1, create individual folders for each of the different surnames linked to SURNAME 1. If SURNAME 1 had a Jones family associated with it, then that folder would be labeled JONES. You may have multiple families with the same surname, but they would probably be associated with a different SURNAME 1.

Below each surname level1 folder, you will need a surname level 2 folder for the same surname to help keep the documents in the proper place; i.e., surname level 1 will be Jones; surname level 2 will also have a Jones folder.

The surname level 2 folder may also contain a folder for each of the children of the level 1 surname. You may chose to create individual folders for BROWN SIDNEY A., BROWN STEPHEN P., etc. You will need to determine just how you want to separate the documents you have gathered at this level.

Step 2 - Create folders by file type

Under each of the surname level 2 or lower folders, create folders to store the many different document types

you will be storing. They may be something like; Vital Records (birth, marriage death), Censuses, Military, Letters, E-mails, Photographs, etc. This list may be different for each level 2 or lower folder.

Step 3 - Scan documents in the Original Documents Binders

Scan every document you have placed in the Original Documents Binders. Give each of the digital document files a title such as: BROWN SIDNEY A - BIRTH BROBIR 01, BROWN STEPHEN P - DEATH BRODEA 05, or whatever identification number that particular document has in your Original Documents Binder. By using this naming system you can see who the document is about, what type of document it is, and where that specific original paper document is stored.

Step 4 - Working with documents not in the Original Document Binder

When you save letters, emails, or other documents not in your OD Binder, make sure you label those so you can readily find them by their file name. If the document is about a specific family, place the surname first, followed by the first name of individual to whom it applies, followed by the type of document and date (if it applies). Example: HUTCHINSON MARK E LETTER 5-12-2013. The surname may be in caps.

You will be saving a lot of the documents you find online, and you may not need to place a copy of them in your binder. Those document files should be titled similar to the example above. If you download a family tree from online, you may title it: SMITH TREE—ANCESTRY 6-20-2014. You may file a printed copy of this document in the SMITH surname folder.

Step 5 - Working with photographs

You may take lots of photographs, but when they are transferred from your camera, cell phone or scanned into your computer they end up with very strange file names. Each of these images need to be re-titled. Don't put this off for that rainy day when you have more time, as you may never do it.

You are welcome to create your own naming system, but I have found that the following order works best for me. Create the title in this order—SURNAME—FIRST NAME (or names of individuals) and DATE. If you have more than one photo of the same event or person they would normally get the same title, be creative so you can tell which one is which when you want to send them to someone. File these photos under the appropriate SURNAME—PHOTO folder.

Step 6 - Linking the documents and photos to your genealogy program

Once you have your genealogy paper and photographs organized in your computer, you are ready to link them to your genealogy program. You will first need to downsize the files as they will be very large when using your camera, phone or scanner. Start by identifying the files you want to link to your program. You may make a list to begin with, or do the following process immediately as you identify the digital files.

You will need a program similar to the free digital graphics program IRFANVIEW, If you do not have a program that can convert graphic file types, download IRFANVIEW free from <www.irfanview.com> for this process.

Open the digital file which is most likely a JPG or TIFF file format. If the file is a JPG, immediately save it without modification to TIFF format. Once you have the file in TIFF format, use the RESIZE option to save it. The final file size should be between 50 KB and 100 KB. Large files will take up too much space in your genealogy program. The more photos you put in the genealogy program the longer it takes to load.

SETTING UP COMPUTER FOLDERS FOR GENERAL GENEALOGY

Create General Genealogy folders

Under Documents (My Documents) create a folder for GENEALOGY—GENERAL. Under that folder create all the folders by topic for your other genealogy related topics

Example: LETTERS (those not pertaining to a family or location), SOCIETIES, WEBINARS, RESEARCH, DNA, ETC. All of your genealogy related documents not related to one of your surnames goes under this folder.

GENEALOGY PROGRAMS AND SOURCES

LEGACY FAMILY TREE - www.legacyfamilytree.com

ROOTS MAGIC - www.rootsmagic.com

REUNIONS (MAC) - <http://leisterpro.com>

Organizing Your Paper Files Using File Folders -

http://familyhistoryandtemplework.com/Organization_System/ALL_REF_DOC_-_Organizing_Paper_Files.pdf

Legacy Family Tree Archived Webinars - Friday, 4 Nov 2011, *FamilyRoots Organizer System* by Mary Hill

http://www.familytreewebinars.com/archived_webinars.php

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