

ORGANIZE YOUR GENEALOGY

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WHAT ARE YOU ORGANIZING?

- Documents
 - Census records, Vital records, Military records, etc.
 - Print & digital
 - Original & copies
- Family Trees
 - Pedigree charts, etc.
- Your notes
- Photographs
- Other items?
 - Bibles, journals, etc.

HOW WILL YOU ORGANIZE?

- Paper or digital?
- Computer, tablet or smartphone?
- Binders or folders?
- Color coding?
- Numbering systems?
- Do you have original items that need to be archived or preserved?

Also consider:

- Will you be sharing this information?
- Are you collaborating on a project?
- Are you making a keepsake for the family?

ORGANIZATION BASICS

Most important:

- Document and organize as you go!
- Be consistent!
- Keep it simple

Other basics:

- Make paper copies of your electronic materials
- Keep your research notes and file them appropriately
- Don't reorganize everything at once

YOUR RESEARCH PROCESS

- Establish a research goal
- Make to-do lists
- Keep Notes
- Record your progress
 - Make a research calendar
 - Keep research extracts and source summaries

Family Group Record

Family Group Record ancestry.com

Prepared By _____ Relationship to Preparer _____
 Address _____ Date _____ Ancestral Chart # _____ Family Unit # _____

Husband _____ (Occupation) _____ Religion _____

Birth _____ Date—Day, Month, Year _____ City _____ County _____ State or Country _____

Christened _____ Name of Church _____
 Married _____ Name of Church _____
 Died _____ Cause of Death _____
 Buried _____ Cemetery _____ Date Will Written/Proved _____
 Father _____ Other Wives _____
 Mother _____

Wife (maiden name) _____ (Occupation) _____ Religion _____

Birth _____ Name _____
 Christened _____ Name of Church _____
 Died _____ Cause of Death _____
 Buried _____ Cemetery _____ Date Will Written/Proved _____
 Father _____ Core/Place _____ Other Husbands _____
 Mother _____

•	Sex	Children	Birth		Birthplace			Date of first marriage/Place		Date of Death/Cause			Computer (I.D. #)
			Day	Month	Year	City	County	St./Prov.	Name of Spouse	City	County	State/Country	
1		Green, Names											
2													
3													
4													
5													

Create a list of members of a specific family

RESEARCH CALENDAR

Research Calendar ancestry.com

Family _____ Researcher _____

DATE	REPOSITORY CALL #/ MICROFILM #	DESCRIPTION OF SOURCE	TIME PERIOD/ NAMES SEARCHED	RESULTS

Log your research progress

SOURCE SUMMARY

Source Summary for Family Information ancestry.com

HUSBAND _____ LINEAGE CHART # _____

WIFE _____ INDIVIDUAL # _____


TYPE OF INFORMATION

B-Birth/Obit	F-Family (Dist)
I-Immig	M-Mar
M-Marriage	D-Death/Burial
W-Wills	L-List
MIL-Military	OTH-Other

DATE	REPOSITORY CALL #/ MICROFILM #	NAME OF SOURCE AUTHOR/PUBLISHING DATE	TYPE OF INFO	INFORMATION FOUND	FILE # (OPTIONAL)

RESEARCH EXTRACT


Research Extract

ancestry.com

FILE NUMBER/FAMILY	REPOSITORY	CALL #/ MICROFILM #
DESCRIPTION OF SOURCE		
INDEXED		
CONDITION		
DATE		
TIME PERIOD/ NAMES SEARCHED		
SEARCH OBJECTIVE		

CORRESPONDENCE RECORD

Correspondence Record

ancestry.com

Family _____ Researcher _____

DATE SENT	ADDRESSEE / ADDRESS	PURPOSE	DATE REPLIED	RESULTS

ORGANIZING YOUR PAPER



easiest system:
One Family = One Folder

FAMILY FILES

- One Family = Father, Mother & Children
- Ancestors will be in two family folders
 - Ancestors prior to marriage will be in parents' folder
 - Once a couple marries, they get their own folder
- It's okay to duplicate documents in multiple folders
- If not using a numbering system, arrange folders alphabetically by name

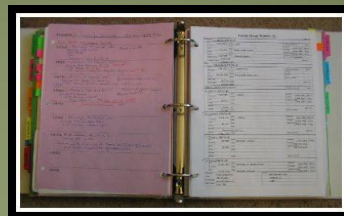
FAMILY FILES

Include:

- Family Group Record
- Research Calendar (Log)
- Source Summary
- Photocopies of Source Documents in order by your document number.
- Notes

Useful to include:

- Pedigree Chart
- Maps
- Copies of photos



DOCUMENT NUMBERS

- Each document should be numbered in the folder
- Record your document numbers on your Source Summary
- The simplest system is to number the files as they're added to the folder:

John
DOE
1852-1920
6

GENEALOGY NUMBERING SYSTEMS

- Folders and ancestors can also be arranged using genealogical numbering systems
- One of the most basic numbering systems is the Ahnentafel:

(First Generation)

1 Subject

(Second Generation)

2 Father

3 Mother

(Third Generation)

4 Father's father

5 Father's mother

6 Mother's father

7 Mother's mother

(Fourth Generation)

8 Father's father's father

9 Father's father's mother

10 Father's mother's father

11 Father's mother's mother

12 Mother's father's father

13 Mother's father's mother

14 Mother's mother's father

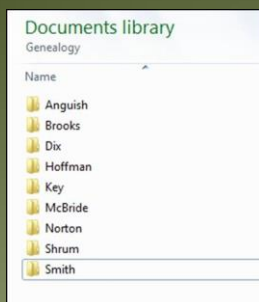
15 Mother's mother's mother

DIGITAL ORGANIZATION

- Computer files
- In the Cloud
 - Evernote
 - OneNote
 - Google Keep
 - Dropbox
- Family Trees
 - Ancestry
 - FamilySearch
 - MyHeritage
 - Subscription software

COMPUTER FILES

Folder Name = Family Name



COMPUTER FILES

Suggested File Names

Smith_Joe-1852-1920-birth

Smith_Joe-1941-enlistment

Smith_Joe_c-1930-census

Smith_Joe-IL-death

Smith-1912-picnic

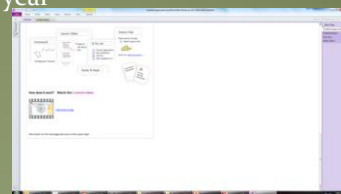
EVERNOTE

- App and website designed for note taking, organizing and archiving
- Works on Windows, Apple and Android devices
- Popular with genealogists for storing and sharing source documents, images, and web pages
- Can also be used for creating research logs, notes, and to-do lists
- Limits monthly bandwidth
- Cost free – 14.99/month



MICROSOFT ONENOTE

- Very similar to Evernote
- Software available on Microsoft Office and Windows 10. Also works on mobile Apple and Android devices.
- Create and organize notes, drawings, web clippings, and audio
- Share your notes and collaborate on projects
- Commonly used on computers and laptops but can be used and synched with tablets and phones
- Integrated with OneDrive
- Space is 5 GB – free – 1 TB - \$69.99/year



GOOGLE KEEP

- Simple to use
- File storage created by Google
- Similar to notes pinned to a digital bulletin board
- 15 GB free storage
- Additional storage from \$1.99/ month - \$299.00/ month



DROPBOX

- Software that will sync files across devices
- Good for collaborating and sharing with others
- Perfect for backing up files



FAMILY TREE SOFTWARE

- Ancestry.com
 - Guest account
 - Free
- Family Tree Builder (MyHeritage)
 - MyHeritage
 - Free!
- FamilySearch.org
 - Free
 - Caveats
- Other Software:
 - RootsMagic
 - Legacy Family Tree
 - Ancestral Quest
 - Family Tree Maker

Additional Information

Useful Websites:

- Pinterest: <https://www.pinterest.com/>
- Ancestry.com Charts and Forms: <https://www.ancestry.com/cs/charts-and-forms>
- Cyndi's List: <https://www.cyndislist.com/organizing>
- Family Tree Magazine Genealogy Software Guides: <https://www.familytreemagazine.com/premium/softwareguide/>
- Family Tree Magazine Apps to Organize your Genealogy: <https://www.familytreemagazine.com/premium/apps-organize-your-genealogy-books/>

Note taking, organizing apps:

- Evernote: <https://evernote.com/>
- Onenote: <https://products.office.com/en-us/onenote/digital-note-taking-app>
- Google Keep: <https://keep.google.com/>
- Dropbox: <https://www.dropbox.com/?landing=dbv2>

Helpful Books

Organize Your Genealogy: Strategies and Solutions for Every Researcher

Drew Smith

GENEALOGY/929.1/SMI

How to archive family keepsakes : learn how to preserve family photos, memorabilia & genealogy records

Denise May Levenick

GENEALOGY/929.1/MAY

How to Archive Family Photos: A Step-By-Step Guide to Organize and Share Your Photos Digitally

Denise May Levenick (on order)

The Genealogy Do-Over Workbook

Thomas MacEntee (not at Palatine Library)

Thanks to Kimberly Schlarman

