

Why Get Organized?

Having your research and files in order offers many benefits, including:

- **More time to do research**, as you'll spend less time looking for needed files or doing duplicate work
- **More efficient research time**, as you'll have clear goals and a research log that will help keep you from repeating research
- **More opportunities to collaborate with others**, as people will be drawn to an organized genealogist more than they would be to one who is disorganized
- **Lower chance of misplacing or losing information**, as your organization system will create a consistent place for everything
- **Less stress**, as being disorganized can wear you down physically, mentally and emotionally



Basic Organization Principles

For an organizing system to be successful, it needs to adhere to a few general principles:

- 1 It needs to be simple.** A simple system is easy to learn, remember, and use. Complex systems are frustrating and difficult to maintain.
- 2 It needs to work well with your existing way of doing things.** This means the system needs to be flexible enough that you can customize it to your workflow, making it that much easier to adopt. And because each of us has different personalities, preferred ways of doing things, and goals, the flexibility of the organizing system becomes essential.
- 3 It needs to be implemented in stages.** Change is inherently stressful. By making small changes over time, you can keep your stress level low. Too many changes too quickly can cause you to revert to the way you used to do things. Even small improvements in organizing your genealogy should result in observable benefits, which will motivate you to continue.



RESOURCES

Websites

Cyndi's List: Organizing Your Research

<www.cyndislist.com/organizing>

How to Organize Your Genealogy by Family Tree Magazine

<www.familytreemagazine.com/organize-genealogy>

The Organized Genealogist Facebook group

<www.facebook.com/groups/organizedgenealogist>

ThoughtCo.: "How to Organize Your Genealogy Files" by Kimberly Powell <www.thoughtco.com/organizing-your-genealogy-files-1420709>

Books and eBooks

Evidence Explained: Citing History Sources from Artifacts to Cyberspace, 3rd edition, by Elizabeth Shown Mills (Genealogical Publishing Company)

Genealogist's Guide to Getting Organized eBook by the Editors of Family Tree Magazine <www.familytreemagazine.com/product/genealogists-guide-to-getting-organized>

How to Use Evernote for Genealogy by Kerry Scott (Family Tree Books)

Organize Your Genealogy by Drew Smith (Family Tree Books)

HOW TO NAME YOUR FILES

How to organize your files (whether paper, digital or both) is one of the most basic decisions genealogists must make to get organized. Your naming scheme will depend on where you'll be storing files and what kind of files you have, but good naming systems share the same basic characteristics:

- **Allow you to quickly find needed files:** The whole purpose of systematically naming your files is so you can find and identify them more quickly. Keep this in mind.

- **Easy to remember and implement:** Organization systems should be simple and easy to apply to your current set of files. The more complicated your system, the harder it will be to apply and keep.

- **Able to adapt to unusual files:** Whatever your naming scheme is, make sure to anticipate potential exceptions and develop a consistent way of treating them. For example, make sure you know how to handle files that are relevant to multiple individuals or family members.

- **Consistent across file types:** File-naming systems are only good if you consistently use them *for both paper and digital files*.

Once you've developed your naming convention system, record it in the table below with a sample, the types of files you'll be recording, the files' location, and notes on any exceptions.

MY FILE-NAMING CONVENTION

| Name convention example | Type of file | Location | Notes |
|---|---|---------------------|---|
| <i>Lastname_firstname-year-recordtype</i> (<i>Smith_George-1917-birth</i>) | individual records for the Smith family | external hard drive | <ul style="list-style-type: none">● If multiple names are associated with record, save record in both ancestors' folders.● If year is unknown, use X in place of the missing digit (for example: 194X if the record was sometime in the 1940s and 19XX if it was sometime in the 1900s.)● If multiple spellings for a name, use the spelling that appears in the record |
| | | | |
| | | | |

POPULAR NUMBERING SYSTEMS

| Naming system | Principles | Example |
|-------------------|--|--|
| <i>Ahnentafel</i> | Designated ancestor is assigned 1; each generation back is numbered by doubling the individual's number (for father) or adding one to the father's number (for mother) | Initial ancestor: 1 Parent generation: 2, 3 Grandparent generation: 4 & 5, 6 & 7 |
| Henry System | Designated ancestor is assigned 1, then his children are given two-digit numbers based on their age order, their grandchildren three-digit numbers based on their parents' number and their age order, and so on | Initial ancestor: 1 Children: 11, 12, 13 Grandchildren: 111, 112 |
| d'Aboville System | Designated ancestor is assigned 1, then his children are given two-digit numbers based on their age order and separated by a period, their grandchildren three-digit numbers based on their parents' number and their age order, and so on | Initial ancestor: 1 Children: 1.1, 1.2, 1.3 Grandchildren: 1.1.1, 1.1.2, 1.2.1 |
| NGSQ System | Designated ancestor is assigned 1; his children are given numbers from oldest to youngest, continuing to each succeeding generation | Initial ancestor: 1 Children: 2, 3, 4 Grandchildren: 5, 6, 7, 8 |

ORGANIZING YOUR WORKSPACE

Whether you have a whole room to dedicate to your genealogy or just a corner of your family's living room, you'll need a home base from which you can do your work. Choosing an ideal workspace largely depends on your resources and your needs as a researcher, but most productive work environments have certain things in common.

The space needs to be:

- **clean, mild, and dry** to be hospitable for old documents and delicate electronic equipment
- **quiet**, but not so quiet that any minute noise distracts you
- **distraction-free**, without windows overlooking busy streets or television screens
- **well-connected**, as modern genealogical research requires a strong internet connection and several power outlets
- **well-lit**, especially when you'll be looking through paper records

Overall, your genealogy workspace should be a place you enjoy spending time, meaning that it should be both functional and attractive.



Learn about the workspaces of professional genealogists at www.familytreemagazine.com/premium/organize-your-genealogy-space.

Workplace Checklist

Most genealogy work can be done at home, so having a productive and efficient workspace is crucial to your genealogical research. Every genealogy workplace will look slightly different, but certain objects will be helpful to many—if not most—researchers. Consider adding the items below to your genealogical workspace, and add your own to the list.

FURNITURE

- large computer desk
 - with large flat space?
 - with drawers?
- small desk
 - with drawers?
- bookshelf
- file cabinets
- closet space
- extra bins
- _____
- _____
- _____
- _____
- _____
- _____
- _____

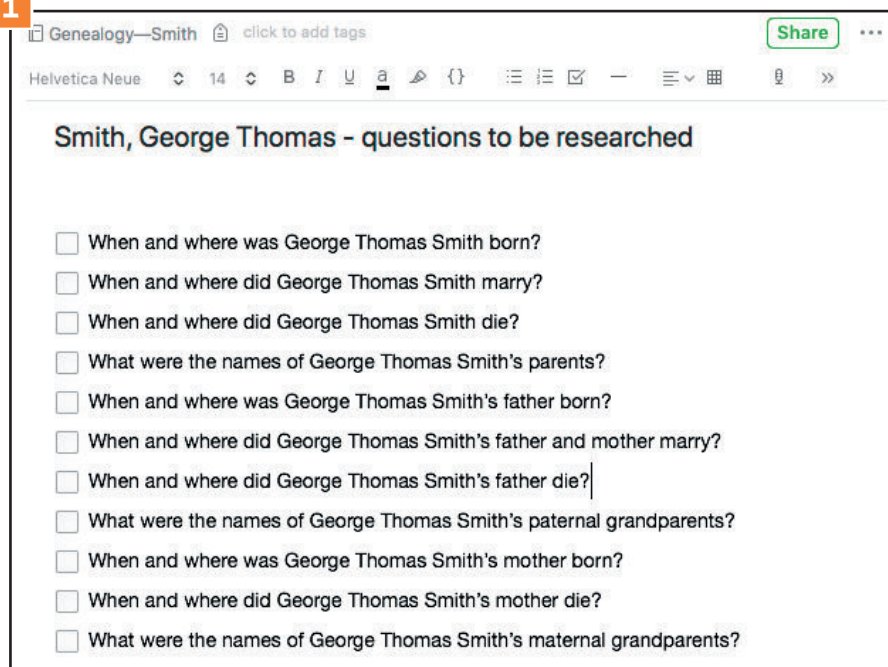
TECHNOLOGY

- desktop/primary computer
 - small enough to carry to conferences?
- charger/power adapter
- uninterruptible power supply (UPS)
- modem/router
- power strips
 - with surge protection
- extra display monitor
- phone charger
- hi-res scanner
- printer
- _____
- _____
- _____
- _____
- _____
- _____

ORGANIZING YOUR RESEARCH PROCESS

Follow these three simple steps for creating an efficient, purposeful genealogy research plan. For this example, I'll identify and document my eight great-grandparents.

1



List of research questions in Evernote

1 ARTICULATE YOUR QUESTIONS

First, identify specific questions that you want to answer, as this will guide what you'll be researching. Even a simple project like identifying my great-grandparents could involve a large number of questions, so focus on what you really want to know.

The research questions in my case are:

- When and where was the person born?
- When and where did the person marry?
- When and where did the person die?
- What were the names of the person's parents?

Your research questions should reflect your current knowledge about your ancestors and experience (if any) with the project. For example, if I were just beginning and did not know the answers to all those above questions, I would have to use placeholders instead of actual names as part of these questions.

Later we'll talk about tools that help you keep track of these questions (and their answers). But for now, note that you want to explicitly list these questions so you don't accidentally leave one of them out.

As you learn the answer to some of your earlier questions, you can edit the later questions to replace the placeholder relationships with the actual name of the individual (though you may want to keep the relationship in parentheses after the name so you can be reminded who the person is and how he fits into your project).

2 IDENTIFY AND INVESTIGATE SOURCES

Pull together any relevant information you might already have and identify sources you'll want to consult to research the question. Because each question will normally involve some type of personal historical event that occurred on a date and at a location, you'll need to take into account at least three things when figuring out which sources to consult:

- what sources would document that kind of event
- what sources would document an event that took place during the likely date range of the event
- what sources would document an event that took place within the likely geography of the event

This means you should make a list of sources to consult for each question, ranked in order from most relevant to least relevant. For basic life events such as birth, marriage, and death, I like to visit the FamilySearch Research Wiki at <www.familysearch.org/wiki/en/Main_Page>. By searching for the likely location of the event (such as a country or US state) and the type of event (such as birth, marriage or death), I can find one or more articles that describe what sources are available and how to access them. I'm also provided with other record types to try if the most direct type is not available.

For a comprehensive list of types of records that would be relevant to each question in US research, the FamilySearch Research Wiki provides a United States Record Finder <www.familysearch.org/wiki/en/United_States_Record_Finder>. This is worth consulting if you've exhausted the most obvious sources for addressing your research question(s). Again, keep a list of these sources with the specific research question so you can keep track of which ones you've already searched and which you still need to review.

As you consult each source, record the information you find and—just as importantly—the information you don't find. Record those “negative findings.” Many beginning genealogists fail to make

2

FamilySearch

Family Tree Search Memories Indexing Activities

Help SIGN IN CREATE ACCOUNT

Research Wiki

Wiki Home
About the Wiki
Online Genealogy Records
Guided Research
Research Resources

Centers/Libraries

Family History Library
Family History Centers
FS Affiliate Libraries

Give Feedback

Submit Wiki Content
Report a Problem
Contact Us

Edit the Wiki

Become an Editor
Upload File/Image
Personal Sandbox
Wiki Projects
Wiki University

Tools

What links here
Related changes
Special pages

Page Talk

Read View source View history

Search FamilySearch Wiki

United States Record Finder

United States → Record Finder

This table can help you decide which records to search. It is most helpful for post-1800 research in the United States.

1. In column 1 find the goal you selected.
2. In column 2 find the types of records most likely to have the information you need.
3. In column 3 find additional record types that may be useful.
4. Then look for the record type you need in the Place Search of the FamilySearch Catalog.

Note: Records of previous research (Genealogy, Biography, History, Periodicals, and Societies) are useful for most goals, but are not listed unless they are especially helpful.

| 1. If You Need | 2. Look First In | 3. Then Search |
|---------------------------------|---|--|
| Age | Census, Vital Records, Cemeteries | Military Records, Taxation |
| Birth date | Vital Records, Church Records, Bible Records | Cemeteries, Obituaries, Census |
| Birthplace | Vital Records, Church Records, Census | Newspapers, Obituaries |
| City or parish of foreign birth | Church Records, Genealogy, Biography, Naturalization and Citizenship, Societies | Vital Records, Obituaries, History, Emigration and Immigration |

United States Wiki Topics

Beginning Research

- Research Strategies
- Record Finder
- Record Types

- Adoption
- Bible Records
- Business Records
- Cemeteries
- Census
- Church Records
- Military Records
- Naturalization & Citizenship
- Newspapers
- Obituaries
- Occupations
- Online Records

The FamilySearch Wiki's United States Record Finder, which suggests records that will give you the information you seek

note of them, but just as a biomedical researcher keeps careful track of which medicines have a beneficial impact on a disease, she keeps just as careful track of which medicines are not beneficial. This helps prevent unnecessary repetition in your research.

3 DRAW YOUR CONCLUSION

The information we derive from sources must be evaluated and analyzed to determine whether it provides evidence to address our research question. At some point, we take the evidence and decide upon a research conclusion. This conclusion is (hopefully) going to include not only the answer to the question, but also documentation of the process of selecting, analyzing and evaluating the sources, information and evidence.

Read the last statement carefully: The conclusion is not just the answer to the question, but should also include the documented reasoning behind it. As an organized genealogist, you should use a process to document what you found, how you found it, and what you did with it. This attention to detail will help you defend your findings to other researchers and even offer up new avenues of research.

3

Genealogy—Smith click to add tags

Share

Helvetica Neue 14 B I U a

When and where was George Thomas Smith born?

Ideas

Known to be November 8, 1917, in Newark, Essex County, New Jersey from family knowledge. But documentation is needed.

Sources to Consult

- ☐ Census records
- ☐ SS records
- ☐ Military Records

ancestry Home Trees Search DNA Health Help Extras Hire an Expert

Back Save

George Thomas Smith

in the U.S., Social Security Applications and Claims Index, 1936-2007

No Image Text-only collection

Add or update information

Report a problem

Name: George Thomas Smith [George T Smith]

Gender: Male

Race: White

Birth Date: 8 Nov 1917

Birth Place: Newark, New Jersey

Death Date: 3 Nov 1999

Father: William H Smith

Mother: Elizabeth Weinglass

SSN: 137011121

Notes: Nov 1936: Name listed as GEORGE THOMAS SMITH; 09 Nov 1999: Name listed as GEORGE T SMITH

Suggested Records

- 1930 United States Federal Census
- U.S. Veterans' Gravesites
- U.S., Find A Grave Index
- U.S., Obituary Collection
- Newspapers.com Obituaries
- Newspapers.com Marriages
- U.S., Department of Veterans Affairs Death File, 1850-2010

An Evernote note containing information about this research question, including a screenshot of an Ancestry.com search

ORGANIZING YOUR GOALS

Know where you're going! Before you begin your research, make concrete, achievable research goals that will motivate you and give your work purpose. You should also make sure your goals have a definitive achievement point, as this will help you better evaluate how far you still have to go to achieve your goal.

In addition to choosing a goal that's practically possible to achieve, you'll also want to designate goals based on your experience level as a genealogist and your interests. After all, genealogy should be fun!

Once you've created your goals, break them down into sub-projects and tasks in a worksheet like the one below. Converting your goals into sub-projects and simple tasks will make your goals more manageable and provide a clearer path to achieving them. Also assign each goal/project weekly, monthly and annual review dates so you can continue to monitor your progress.

SAMPLE GOALS

Let these suggested genealogy goals inspire your research:

- Identify the immigrant ancestor in each family line.
- Document all of an ancestor's descendants.
- Locate your family's ancestral hometown overseas.
- Create a complete family tree for an event such as a reunion, anniversary or birthday.
- Identify an adopted ancestor's biological parents.
- Discover where a particular relative is buried.
- Write about your family history.
- Answer a specific family history question, such as "Are we related to a *Mayflower* pilgrim?" or "Did Great-great-grandfather really work on the transcontinental railroad?"
- Apply for membership in a lineage society, such as the Daughters of the American Revolution <www.dar.org>.
- Learn about Grandpa's experience serving in World War II.
- Trace the provenance of a family heirloom.
- Figure out who's in an old, unidentified photo.
- Research a family home or farm.
- Create life timelines for your four grandparents.

Goal-Management Worksheet

| PROJECT A: | PROJECT B: | PROJECT C: |
|-----------------------------|-----------------------------|-----------------------------|
| Sub-project 1: | Sub-project 1: | Sub-project 1: |
| <i>To-do list</i> | <i>To-do list</i> | <i>To-do list</i> |
| 1. | 1. | 1. |
| 2. | 2. | 2. |
| 3. | 3. | 3. |
| Sub-project 2: | Sub-project 2: | Sub-project 2: |
| <i>To-do list</i> | <i>To-do list</i> | <i>To-do list</i> |
| 1. | 1. | 1. |
| 2. | 2. | 2. |
| 3. | 3. | 3. |
| Sub-project 3: | Sub-project 3: | Sub-project 3: |
| <i>To-do list</i> | <i>To-do list</i> | <i>To-do list</i> |
| 1. | 1. | 1. |
| 2. | 2. | 2. |
| 3. | 3. | 3. |
| <i>Weekly review dates</i> | <i>Weekly review dates</i> | <i>Weekly review dates</i> |
| <i>Monthly review dates</i> | <i>Monthly review dates</i> | <i>Monthly review dates</i> |
| <i>Annual review dates</i> | <i>Annual review dates</i> | <i>Annual review dates</i> |

TIPS FOR ORGANIZING YOUR RESEARCH

1 Store things you need most often closer to you. Perhaps the simplest strategy in organization is the most valuable: Whether on your digital or physical desk-top, position the items you use most often (frequently referenced books, a hyperlink to an important records collection, a copy of your family tree) closer to your primary workspace so you can quickly and easily access them.

4 Schedule regular breaks. Taking breaks during research sessions can help keep your mind sharp and allow you to do better research for longer periods of time. Use your computer's or phone's reminder or alarm application to remind you to take a break every 30 or 60 minutes to at least stretch—or for a quick Facebook break!

7 Organize with tech tools. No matter what your organizational task, there's likely an application or software program that can help you. Look for programs and services that can make your research process easier; the chart on the Organization Tools page has some of the most popular to get you started.

2 Be patient. Because becoming an organized genealogist is a process, you're developing habits, not making a one-time decision. Changing routines, workflows, and organizational systems will take time, so don't become frustrated if you find you don't change overnight.

5 Track queries on a research log. Remembering what sites you've searched (and what search terms you've used there) can be tricky, especially if you only have time to do your research in spurts. Keep a research log to record what and where you searched as well as what you found there. This will keep you from doing duplicate work. Download a free template at <www.familytreemagazine.com/freebie/researchplannerandlog>.

8 Plot it out on a calendar. As you choose your genealogical goals and designate sub-projects and tasks, block out time for each activity on a print calendar or (better yet) on a calendar application that will sync across your devices, such as Google Calendar <calendar.google.com>. This will allow you to plan ahead and ensure that all your necessary tasks are accounted for.

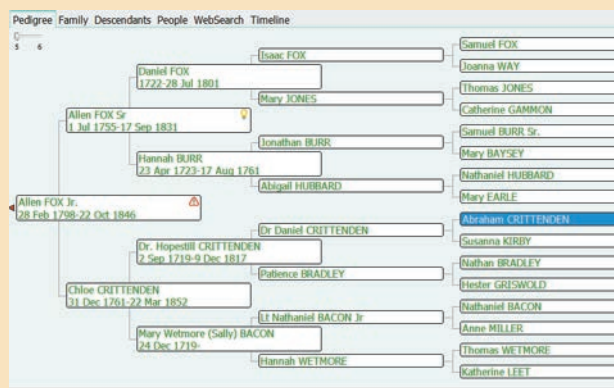
3 Evaluate your research goals. Setting your goals is only half the battle. You need to revisit your goals periodically to see what you've been able to accomplish—and what work still needs to be done. Schedule reviews for each of your goals on a regular basis (e.g., every week, month or year) to check in on your progress and edit or update your goals as necessary.

6 Make specific learning goals. Genealogists are lucky to have a number of quality resources such as webinars, lectures and online courses. But articulating exactly what you want to learn (and why you'd like to learn it) will help you sort through all these options and choose only the educational opportunities you need to achieve your goals.

9 Remove distractions from your workspace. When you're doing research, it's best to create an environment with limited distractions. This could involve silencing notifications on electronic devices or clearing items off your desk and unneeded files off your computer's desktop.

BONUS TIP: USE GENEALOGY SOFTWARE

Perhaps no program is as catered to a genealogist's needs than software designed specifically for genealogists. Programs such as RootsMagic <www.rootsmagic.com> (pictured right), Family Tree Maker <www.familytreemaker.com>, Heredis <www.heredis.com> and Ancestral Quest <www.ancquest.com> can help you organize every aspect of your genealogy, from creating your family tree to recording research finds and logging record citations. Some programs, like RootsMagic and Family Tree Maker, even sync up with major records websites like Ancestry.com <www.ancestry.com>, allowing you to exchange data with your online family trees.



ORGANIZATION TOOLS

Thanks to modern technology, genealogists have access to hundreds (if not thousands) of applications and software programs that can aid in managing your genealogy research life. The table below shares some of the most useful tools, plus what they can accomplish, what devices they support, and how much they cost.

If you're new to a tool, make use of its free standard version or a free trial before selecting a paid subscription plan.

| Name | Summary | Features | Devices | Cost |
|---|---|--|------------------------------------|--|
| Coggle <www.coggle.it> | Mind-mapping application | <ul style="list-style-type: none"> ● create mind maps that visualize organize ideas, images, and other information ● share mind maps with other people ● track edit history and previous versions of mind maps | Web browser; Android; iOS | Free (Free account); \$5/month (Awesome account); \$8/month (Organization account) |
| Dropbox <www.dropbox.com> | Cloud-based file-storage system | <ul style="list-style-type: none"> ● back up digital files on a secure server ● share files with collaborators and across multiple devices | Web browser; Mac; PC; Android; iOS | Free (Basic plan); \$9.99/month (Plus plan); \$16.99 (Family plan) |
| Evernote <www.evernote.com> | Note-taking and data organization application | <ul style="list-style-type: none"> ● store and sort multiple kinds of data, including text, images, PDFs, audio files, and e-mails ● save web content directly into application ● sync data across multiple devices | Web browser; Mac; PC; Android; iOS | Free (Basic account); \$7.99/month (Premium account); \$14.99/month (Business account) |
| Evidentia <evidentiasoftware.com> | Source-citation software | <ul style="list-style-type: none"> ● create source citations ● indicate whether a source is original, derived, or published by another source | Mac; PC | \$29.99 (download/CD); \$40.99 (Standard bundle with companion book) |
| Feedly <www.feedly.com> | News-aggregating application | <ul style="list-style-type: none"> ● create custom news feed of blogs and websites ● save news articles and share to other medium (Evernote, social media, etc.) | Web browser; iOS; Android | Free (Basic account); \$6/month (Pro account); \$8.25/month (Pro+ account) |
| OmniFocus Pro <www.omnigroup.com/omnifocus> | Project-management system | <ul style="list-style-type: none"> ● divide projects into sub-projects and tasks ● create tasks, set reminders for them, and mark off as they're completed ● sync projects across multiple devices | Web browser; Mac; iOS | \$99.99 (license); \$9.99/month (subscription) |
| RootsMagic <www.rootsmagic.com> | Family tree recording and analysis software | <ul style="list-style-type: none"> ● create and edit family trees ● document source citations ● analyze research data for errors ● export trees as GEDCOM files, charts, reports, lists and more ● sync with Ancestry.com and import/export from FamilySearch | Mac; PC; iOS | Free (Essentials version); \$19.95 (upgrade from previous version); \$29.95 (new)* |
| Trello <www.trello.com> | Task-management system | <ul style="list-style-type: none"> ● divide projects into sub-projects and tasks ● share/manage group projects and assign tasks to specific users ● export tasks to other programs, such as Dropbox <www.dropbox.com> and Google Drive <drive.google.com> | Web browser; iOS; Android; Mac; PC | Free (Free account); \$9.99/month (Business Class account); \$17.50/month (Enterprise account) |

*At time of writing, RootsMagic 8's release was still pending. Purchase options may change when this new version is available.