

# Controlling **Chaos**: Organizing Your Genealogical Materials



Paula Stuart-Warren, CG®, FMGS, FUGA

[PaulaStuartWarren@gmail.com](mailto:PaulaStuartWarren@gmail.com)

<http://genealogybypaula.com>

Are you like most genealogists? Do you have stacks of paper, files, certificates, census copies, and other things around your home? Do you panic when you have to find something or have to use the dining room table for a meal? Can you find what you need in your computer files? You can conquer this dilemma and learn tips for regularly keeping on top of organizing. No one can promise perfection, but this session will share many ideas to get you on your way. We'll even discuss some "lazy day" methods to keep you on top of your filing.

1. **Use forms & software.** The genealogical marketplace offers many preprinted forms in paper and electronic format and the range of genealogy software databases is always growing. Many forms can be downloaded and so can test versions of some software.
2. **You are not alone.** Another set of eyes and hands often helps you get on track. We'll talk about ways to find help and how to "impose" on friends and relatives. It's more than inviting them over to dinner so that you will have to clear off the table. You will get their advice but need to adapt it so that it works for you. Ask them back later – and see if they approve.
3. **Be a list maker.** Yes, you need to become one if you have not already developed that habit. Why Grandma Gert's system works. A topical index works wonders. Software exists that helps you organize your day, week, year, photos, and more.
4. **Binders vs. file folders; boxes vs. file cabinets; favorites vs. bookmarks vs. whatever.** Some practical advice on each, including cost, storage considerations, access, and your brain!
5. **It's not brain surgery.** She's talking about our brains again! Have you ever organized your tools, bills, sewing materials, spices, cosmetics, office supplies, or tax items? Transfer some of the same techniques to your genealogy materials. Be consistent with the labels used in emails, word processing, file folders, file cabinets, and special note-taking software.

6. **Categorizing, numbering, color coding, and alphabetizing.** What way works for your brain? The alphabet is the same for everyone, truly. It's the way you use it that makes a difference. Keep your "files" and labels consistent and the same for both paper and electronic files. In other words, the categories and sub-categories in your filing cabinet, word processing, and email should be the same. Quick access to specific items is possible, via forms, charts, binders, and quick reference files. Digitize important items so that they are always on your PC, laptop, flash drive, or tablet along with a genealogy software program.
7. **Where on earth did I find this?** Some simple ideas on source citations and a helpful form will relieve the problem. Unidentified files and paper don't do you any favors and won't help you find things. Future generations will be clicking their tongues at your work.
8. **Your notes are written on what? Your originals are in the car?** Tips on paper, what to carry, to leave at home, and safe storage. Hint: the back of a used envelope is not adequate.
9. **Is your hard work worth preserving? What can you do with Great Great Grandma's diary?** Some simple preservation tips and where to get more help.
10. **What do vitamins along with flossing and brushing your teeth have in common with organizing?** You didn't think I'd give it away in this handout, did you? If you guess the correct answer ahead of time you win an extra hour next weekend for organizing.
11. **Computers and their descendants are here to stay and they can be helpful.** You don't need to be shy, but don't let them control your organizing either. Test different software to see what works for your brain. These do aid in our research, unless we spend too much time using them as toys rather than helping to streamline our research and time spent. Your organizing style in hard copy can translate to computer file organization.

#### **Following the advice of other genealogists**

12. Dollarhide, William. *Managing A Genealogical Project*. Updated ed. Baltimore: Genealogical Publishing Co., 1999.
13. Fleming, Ann Carter. *The Organized Family Historian: How to File, Manage, and Protect Your Genealogical Research and Heirlooms*. Nashville: Rutledge Hill Press, 2004.
14. Rose, Christine and Kay Ingalls. *The Complete Idiot's Guide to Genealogy*. 2<sup>nd</sup>. ed. New York: Alpha Books, 2006. [Chapter 17 covers organizing.]
15. Scott, Kerry. *How to Use Evernote for Genealogy: A Step-by-Step Guide to Organize Your Research and Boost Your Genealogy Productivity*. Cincinnati: Family Tree Books, 2015.
16. Smith, Drew. *Organize Your Genealogy: Strategies and Solutions for Every Researcher*. Cincinnati: Family Tree Books, 2016.

#### **Forms & Charts** (also see #42 for more forms in software programs)

17. Ancestry.com: [www.ancestry.com/download/charts](http://www.ancestry.com/download/charts). Difficult to find; use this URL.
18. [Cyndislist.com](http://Cyndislist.com): click on the categories of "Organizing Your Research," "Numbering Systems," or "Free Stuff" for links to forms and other helpful information.
19. Family Tree Magazine Free Forms <http://www.familytreemagazine.com/FreeForms>

### **Professional organizing advice from non-genealogists** [Older methods do still work!]

20. Booher, Dianna Daniels. *Clean Up Your Act! Effective Ways to Organize Paperwork -- and get it out of your life*. New York: Warner Books, 1992. [Great! Out of print but in libraries.]
21. Hatcher, Diane. *Don't Agonize, Organize Your Office Now! Simple Solutions for Your Office Organizing Challenges*. Charleston, SC: BookSurge Publishing, 2007
22. Mann, Sharon. *I Hate Filing: Everything You Need to Get Organized for Success and Sanity at Home, on the Run and in the Office*. Deerfield Beach, FL: HCI, 2006.
23. Nakone, Lanna and Arlene Taylor. *Organizing for Your Brain Type: Finding Your Own Solution to Managing, Time, Paper, and Stuff*. New York: St. Martin's Griffin, 2005.
24. National Association of Professional Organizers. 15000 Commerce Parkway, Suite C, Mount Laurel, NJ 08054. (856) 380-6828. [Find professional organizers in your area and audio recordings of conferences. The list of services is extensive. The hourly charge is \$50.00-\$300.00. [www.napo.net](http://www.napo.net) NAPO has chapters in many states.]

### **Preservation assistance**

25. Levenick, Denise May. *How to Archive Family Keepsakes: Learn How to Preserve Family Photos, Memorabilia and Genealogy Records*. Cincinnati: Family Tree Books, 2012. <http://thefamilycurator.com/>. Also see her *How to Archive Family Photos: A Step-by-Step Guide to Organize and Share Your Photos Digitally*.
26. Sturdevant, Katherine Scott. *Organizing and Preserving Your Heirloom Documents*. Cincinnati: Betterway Books, 2002.
27. Taylor, Maureen A. *Photo Organizing Practices: Daguerreotypes to Digital*. Westwood, MA: Picture Perfect Press, 2014.
28. [www.cyndislist.com](http://www.cyndislist.com) click on "Preservation and Conservation" for almost 200 links.
29. [www.mnhs.org](http://www.mnhs.org) Minnesota Historical Society. Click "Preservation" and then "Conservation."
30. [www.nedcc.org](http://www.nedcc.org) Northeast Document Conservation Center. Online tips and more.

### **Numbering and documenting your sources**

31. *The Chicago Manual of Style: The Essential Guide for Writers, Editors, and Publishers*. 16th ed. Chicago: The University of Chicago Press, 2010. [For the fee-based online edition check [www.chicagomanualofstyle.org/home.html](http://www.chicagomanualofstyle.org/home.html)] The 17<sup>th</sup> edition is due any day.
32. Curran, Joan F. *Numbering Your Genealogy: Sound and Simple Systems*. Arlington, VA: National Genealogical Society, 1992. [Also as an article in the *National Genealogical Society Quarterly* of September 1991 (Volume 79, pages 183-193). And *Numbering Your Genealogy: Basic Systems, Complex Families, and International Kin*. Arlington, VA: National Genealogical Society, 2008 [2008 edition is updated by Elizabeth Shown Mills.]
33. Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*. 3<sup>rd</sup> ed. Baltimore: Genealogical Publishing Company, 2015.
34. **Preservation supply sources:** Use proper storage for paper and family heirlooms. Acid-free paper is widely available and gift stores or museum shops at historical societies carry archival supplies including boxes, paper, file folders, photo albums, and more. For online ordering:
  - Gaylord Brothers, Phone: 800-428-3631; [www.gaylord.com](http://www.gaylord.com)
  - Hollinger Corporation, Phone: 800-634-0491; [www.hollingermetaledge.com](http://www.hollingermetaledge.com).
  - University Products, Inc. Phone: 800-336-4847; <http://www.universityproducts.com/>

## Computer & other electronics



35. Check computer genealogy publications for articles on various computer programs and their capabilities and drawbacks. Check *Internet Genealogy* <http://internet-genealogy.com/>
36. Clooz. [www.clooz.com](http://www.clooz.com) An “electronic filing cabinet” using a database; A video explains how to operate Clooz and import data from censuses, city directories, photos, courthouse documents.
37. See if a genealogical society near you has a computer interest group and meetings. The sharing of information on different programs, styles, and what does and doesn't work is valuable. There might be a group dedicated to a specific genealogy software.
38. Don't forget to learn the programs that either came with your computer or that you purchased – thinking they would do wonders to get you organized. Libraries offer classes. These include Excel, Access, and other database programs. Don't have those? Try [www.openoffice.org](http://www.openoffice.org).
39. [www.librarything.com/](http://www.librarything.com/) A free cataloging program for up to 200 of your books. Unlimited cataloging for \$10.00 per year or \$25.00 lifetime. It's easy since so many others have catalogued genealogy related books and you can just copy to your own section!
40. Webinars: many free or low-cost webinars are offered by genealogical societies, companies, and individuals which give general tips on organizing your genealogical materials and on using specific software. These and [YouTube](#) videos provide ongoing help for those of you who need visual reminders of various organizational skills and specific software.
41. *The Organized Genealogist*: Facebook page with great advice, photos, forms and more. Check under the “Files” tab. [www.facebook.com/groups/organizedgenealogist](http://www.facebook.com/groups/organizedgenealogist). Technology for Genealogy is another page on which fellow genealogists share knowledge on various software and hardware. Sign on to Facebook, search for this page, and request to be added.
42. Genealogy programs aka family tree software: Whether you choose RootsMagic, Legacy, Reunion (for MACs) or other program, it's a great way to keep track of the family tree. Videos, webinars, books, and Facebook pages give extensive help on these programs. Be sure to fully cite your sources. Posting a family tree on Ancestry, FamilySearch, or other website is NOT the same as having your tree on software on your own computer and backups. Some people keep track in a word-processing format.
43. Electronic aids help in various note taking, filing, organizing, and other capabilities. Many such programs are also available for your computer and portable electronic devices.
  - **Microsoft OneNote** [www.microsoft.com/office/onenote](http://www.microsoft.com/office/onenote)
  - **Evernote.com** <https://evernote.com/> [See [Cyndislist.com](http://Cyndislist.com) for extensive links to tips and examples. Also see the Kerry Scott book at #15.]
  - Others to check: Excel, [Google Docs](#), [Trello](#), [PaperTiger](#), [Folder Marker](#)