

Organizing Your Genealogy: It's Not as Difficult as You Think

Dannell (Danni) Altman-Newell



Talking Box Genealogy

danni@talkingboxgenealogy.com



<https://talkingboxgenealogy.com>

Signs your genealogy organizational system isn't doing its job:

- You struggle to find the information you're looking for
- You avoid or procrastinate organizing because it causes feelings of being overwhelmed
- You avoid your workspace because of the clutter

A good organization system:

- Allows you to find things easily
- Allows you to organize new things quickly
- Is reliable
- Is easy to implement
- Is easy to remember

Organizational system basics

- Use or create an organizational system that works for **YOU**.
- It should be easy to locate items – for both you **AND** following generations.
- It should make sense
- Keep it as simple as possible
- Digital filing needs to mirror your hard copy filing system.
- Create a “home location” to serve as a stable, non-moving place for things to live.

Popular systems

- | | | |
|--------------|----------------|---------------------|
| • Surname | • Family lines | • Numeric |
| ○ Family | • Record type | ○ Ahnentafel |
| ○ Couple | • Location | ○ Register method |
| ○ Individual | | ○ NGSQ method |
| | | ○ Henry method |
| | | ○ d'Aboville system |

Filing/Storage

- Label everything – it should be easy to read and quickly identify the contents
- Store originals in a dry, secure location. Acid-free folders and boxes are the ideal storage medium.
- Digitize/photocopy all original documents and use the copy for research instead of the original.

Steps to organization

1. Choose a system
2. Decide on a storage medium
 - a. Paper
 - b. Digital
 - c. Hybrid
3. Choose a container
 - a. Filing cabinet
 - b. Binders
4. To color code or not to color code?
5. Going mobile – how will your system work when you travel?
6. Start now and stay current
7. Schedule time to work on the backlog.

What will your process be? – Think, plan, act.

- Evaluate item(s)
- Digitize
- Catalog/number
- Transcribe/abstract
- Cite
- Database entry
- File/organize
- Document new tasks/questions
- Update research log/project notes

Dealing with the backlog – How do you eat an elephant?

1. Gather
2. Sort, sort, sort until you get to the smallest group that makes sense to **YOU**
3. Process/take action on
4. File

Keeping up with your organization

- Establish an organizational routine
- Be consistent when organizing
- Make an appointment with yourself to work on organizing if you need to
- Utilize an inbox setup where new items reside pending processing/organization.
- Work in small blocks of time to prevent overwhelm and exhaustion

Things to remember:

- Organization is personal and “being organized” isn’t the same for everyone.
- Plan your system structure and processes before you begin organizing. Document the structure and processes, print them and post them where you can see them when you organize.
- Revise your system as needed to make it easier and more efficient.
- Use a research log or notes page and keep it with the project file while actively researching. Once the project is finished, file it with the permanent file.
- Use tools like decision trees and organizational charts to assist you in organizing.
- When dealing with the backlog, consider working in small blocks of time as opposed to extended periods of time.

Attendees of this session
will receive an additional
handout containing
“bonus” material.