HOW TO ORGANIZE YOUR PAPER FILES

Genealogy is fun when you can find things, but it can be frustrating when you can't. Therefore, you need a simple system for organizing papers so that you can quickly find them again.

Not everything you know about your families may come from facts written down on paper. You may have recordings on audio or video tape that includes genealogical information. If so, you need to transcribe the genealogy onto paper and include that paper sheet in your file.

Begin thinking of your files as a "database". This is a paper database of facts about your ancestors. The goal should be to have every fact you have ever found on your ancestors in one place. If you have facts in your memory that have never been written down, now is the time to do that.

The system needs to be:

- Simple to set up
- Flexible
- Simple to maintain
- Inexpensive
- Consistent
- Safe and understandable for future generations

Different ways to organize your papers:

- **Filing Cabinet & File Folders -** File folders, probably the most popular organizational tool for genealogists, are inexpensive, very portable, and easily hold papers of different shapes and sizes. File folders make it easy to consult documents, but you have to be diligent about making sure the paper is put back where it came from. Once you've generated a lot of paper, however, the file folder system is the most flexible and expandable.
- **Binders -** If you're someone who really likes to keep things together in one place, then organizing your printed genealogy data into binders may be a good option for you. This method standardizes your genealogical records into a regular size paper format. Documents that you don't wish to three-hole punch can be added in clear sleeves. Binders are portable and don't require a filing cabinet, however, if you do a lot of genealogical research you may find that binders eventually become too cumbersome on their own.
- **Computer Disks, CDs, & DVDs -** Transcribing or scanning genealogical documents into the computer can save quite a bit of space and computerized organizational systems can greatly speed up tedious tasks such as sorting and cross-referencing. But, will your descendants 100 or more years from now have a computer that can read them? If your files don’t go to someone who protects and maintains them, they will be of little use. If you choose to use your computer as your primary organizational system, consider also making and preserving copies or printouts of important documents.

Once you get started organizing your genealogical clutter, you'll probably find that a combination of storage methods works best. It is important to keep in mind that organization is and always will be a work in progress.

Commonly used genealogical filing systems include:

- By Surname, Individual - All papers for an individual are filed in a folder alphabetically.

- By Couple or Family - All papers related to a husband and wife or family unit are filed together.
- By Family Line - All papers related to a specific family line are filed together. Many genealogists begin by starting with four such ancestral lines - one for each of their grandparents.
- By Event - All papers related to a specific event type (i.e. birth, marriage, census, etc.) are filed together.

SETTING UP THE FAMILY LINE COLOR CODE FILING SYSTEM

This system sets up file folders for the families on your pedigree lines. Pedigree charts are divided into 4 colors, based on the lines of your 4 grandparents. Dividing your pedigree by color helps make it clear which line a family belongs to. For each family on your pedigree, a family file folder holds documents and a printed copy of that family's group record.

1. Print a copy of your own 5-generation pedigree chart, starting with yourself as # 1. You are the first generation; your 16 great-great grandparents are the 5th generation. Color-code the lines as follows:

- BLUE: Circle all families who are ancestors of your father's father in blue.
- GREEN: Circle all families who are ancestors of your father's mother in green.
- RED: Circle all families who are ancestors of your mother's father in red.
- YELLOW: Circle all families who are ancestors of your mother's mother in yellow.

2. At the front of your file box put a complete set of your family pedigree charts. Label the tab of a standard green hanging file folder "Pedigree Charts." Print a complete set of all your pedigree charts, for all lines. Start with yourself. If your computer program allows you to also print an index of your pedigree names, include that in the file folder with the pedigree charts.

3. Set up Holding Files to store items temporarily. Genealogists acquire many documents, notes, e-mails, and letters that need to be analyzed, used, and filed. But it isn't always possible to file items immediately after finding new information. Set up Holding Files for storing information that pertains to a surname until you can analyze, use, and file these items.
Place the Holding File right behind the surname hanging file with the pedigree charts, and before the family files. Do this for any surname where you have many documents and see the need.
When you have a large number of documents for a surname, it helps to create two Holding Files for that surname. Set up one folder as a Temporary Holding File, and the other for a Permanent Holding File to store documents that have more than one family’s information in them. Be sure to go back and use the documents stored in the Holding Files!

Miscellaneous items you can include in a family folder:

1. The family group record of the family. If there was more than one marriage, make a separate folder with a family group record for each other marriage.
2. Documents you have already gathered, which belong with this family.
3. Include all documents from the time of a couple's marriage. Documents that pertain to events prior to their marriage can be filed in the folders of their parents, such as birth certificates and baptism certificates.

Add the following items to a family folder, as you need or want them:

1. To Do List - a list of questions about this family which you want to find answers for
2. Research Log - for keeping a record of sources you look at about this family
3. Timeline - for a chronology of this family's life events
4. Maps pertaining to where this family lived
5. Research notes taken
6. New documents found
7. Family group records for children, as parents with their own children, who are not the direct-line child. Note that they are not a part of the alphabetical filing system, but are filed right behind their parents.

Pros and Cons

Each of these systems has pros and cons, and it is up to the individual researcher to decide which of the cons is unacceptable. In each case you will find that you have overlap in your records. In many cases, if it is just a single page, another copy is the best way to handle it. If it is extensive, such a probate file or a detailed family history, then you will probably just want to put a page in the other folder directing you to see the folder in which you did file the pages.

You may find after reading more about these different systems that you like a little bit of each one and you will go off and create your own system. That is fine. The important point is to make sure that whatever system you do go with is one that you will use. If you don't stick with the system then you are no better off than you were before you organized your records.

Familysearch's tutorial for organizing:
http://www.familysearch.org/Eng/Search/RG/frameset_rg.asp?Dest=G1&Guide=ALL_REF_DOC_-_Organizing_Paper_Files.asp

Final word about an organizational system:

When setting up a system, you might want to use parts of one or more systems, or totally create your own. Remember, when setting up your system, it is **YOUR** system. Whatever you will use and understand is the best system for you.