How to Organize Your Family History

This guide will help you establish an organization system for your family history, including the all-important research log.

TOPICS

Organization

Genealogy can become overwhelming when you don't have a plan for what to do with all of the information that you uncover. The best way to prevent becoming inundated with information is to stay organized. The simple plan below will help you stay on track and ready to uncover even more family history.

ORGANIZE YOUR FILES

The organization system outline here is one of many different ways to organize files. The best system is the one that will work for you, that is simple, and one that you will keep using. What is great about the system here is that it is simple to use and serves both paper and digital needs. As you use this system or another one, you may develop your own system using principles from other systems. If you have already started some kind of organization system and want to try this one, do not do a mass reorganization of all your files—start this system when you pick up research on a new family. If you do want to reorganize your entire system, do it one family at a time. As you do this, you

might find additional ideas on what to research for a family that you didn't think of before.

Before we get to the organization system, let's go over the basic research and organization principles for this system. They are:

Document and organize as you go

Start with a research goal and fill out a research log

Research the easiest events first

After your search, do not stop working until you finish your paperwork and filing

Don't get discouraged—filing and research gets easier with experience.

Remember, you are leaving a legacy for future researchers.

EASY SYSTEM TO ORGANIZE YOUR RESEARCH (ONE FAMILY = ONE FOLDER)

One of the easiest systems to organize your genealogy is to keep one family in one file folder. For the purposes of this system, one family consists of parents and their children. The file folder contains:

Family Group record (required)

Pedigree chart (optional)

Maps of family settlements (optional)

Research log (required)

Photocopies or electronic copies of source documents in order by your document number (required)

SETTING UP THE SYSTEM

Setting up this system is very easy. Follow these steps:

Use a manila folder and write on the tab: husband's name and his birth and death year as well as the wife's name and her birth and death year. The husband's name and dates should appear on every piece of paper in the folder (in case something falls out of a folder). It's not standard practice, but if you would like to create a maternal focused family tree, make your maternal line the head of the household and use her name on every paper. Whatever you choose, be sure that you are consistent. Examples:

Traditional Folder Tab: John Smith [18 July 1865 – 20 August 1930] & Mollie Mae McKinney [24 February 1870 – 3 December 1940]

Traditional Document Numbers: John Smith [18 July 1865 – 20 August 1930] #1

Maternal Folder Tab: Mollie Mae McKinney [24 February 1870 – 3 December 1940] & John Smith [18 July 1865 – 20 August 1930]

Document Numbers: Mollie Mae McKinney [24 February 1870 – 3 December 1940] #1

Keep the file folders in alphabetical order by the name of the head of the household.

Compile and print a family group record to put in the folder. Ideally, you will have one source for every event on the family group record. If you don't have this yet, start with what you have and continually update the family group record. Add other events beyond birth, marriage, and death. For example, show events like censuses, migrations, land purchases or sales, and wills on the family group record.

Prepare a research log to put in the folder (examples to follow later in this guide).

For more information on how to create Document Numbers, please see the appendix of this document.

KEEPING THE SYSTEM ORGANIZED

Keeping this system organized takes minimal effort. The best way to keep up on it is to follow these principles:

Commit to stay organized

Prepare for each new search

Pick a research objective for the family (one person in the family, and one event in that person's life)

Write that objective on the research log, with a source you hope will document that event. Write the source bibliographic information on the research log BEFORE you look at the source

Document on the research log whether the search was positive or negative. If the search was negative, make note of it on your log and continue to document the same event using a different source. If the search was positive, follow the Nine Steps to Staying Organized after a Positive Search in the research log section of this guide.

Finish the paperwork and filing BEFORE you start the next search

For more filing help, see the appendix of this document.

Research Logs

Research logs are a basic tool and one of the easiest components of genealogy work. A research log is a list of sources you have searched and the purpose of each search (what you hope to find), and the results of your search (even if you didn't find anything). Research logs help you to:

Cite your sources

Sort out what family information has and has not been found

Organize and correlate copies of documents

Weigh evidence to make better conclusions, better lineage links

Show your search strategies and questions

Reduce repetitive searches—you won't forget you already searched that record for thirty minutes and found nothing

There are many examples of research logs out there and the best one for you is the one that works for you. Do not create one huge research log for all families. I keep a research log for each family unit. My research log looks like this.

Searching

WHAT TO DO BEFORE A SEARCH

Before you start a search, fill out your research log with:

Date

Place of research

The reason for your search—are you looking for a death date? A birth date?

Source—what source you've decided to examine

If you do this before you examine your search, it will be very easy to write "nil" if your search was negative. Then you won't repeat that same search later because you'll know you already looked at it and found nothing.

WHAT TO DO AFTER A SEARCH

When you finish your search, fill out the remainder of your log:

Write the document number you created in the log (example: Columbus Washington McKinney [1859-1932] #1)

Write nil if the search was negative

If the search was positive, write down what you found. Include whether or not you searched the entire document, what pages you looked at, what search terms you used, etc.

NINE STEPS TO STAYING ORGANIZED AFTER A POSITIVE SEARCH

Once you have found a source for your individual you will need to organize that information. These nine steps will help you stay organized:

Photocopy/print the source, or save it electronically

Write the bibliographic information on the front of the source (in the margins)

Write on the back of the source the document number (example: Columbus Washington McKinney [1859-1932] #1). These document numbers make your research log into a table of contents for your sources

Finish your research log by summarizing your results and writing down any additional questions the source raises

Transfer each piece of data from the new source to your family group record

Cite ALL sources found for each event on our family group record (example: it's okay to have several sources documenting a birth)

Evaluate the reliability of the source in your research log or on the source itself

Print and file the updated family group record, or generate a new electronic copy

File the paper copy of the source in your family folder (or file the electronic copy)

Appendix

FILING HELP

Each ancestor is in two families: once as a child, and once as a parent. Log and file sources for events prior to marriage in the father's folder. Log and file events starting with marriage in the head of household's folder.

Second marriages, in-laws, and step-children: Log and file sources about these relatives in the file of their closest relative on your pedigree chart.

Digital copies and electronic storage: Computers make it possible for us to do genealogy quickly and efficiently. Despite this, you need to keep a paper copy of your research notes (and whatever else you have space for) as a backup. Or keep a very rigorous system of backups on your electronic records—multiple copies, cloud storage, external hard drives, etc.

Even if you digitize family heirlooms like diaries, letters, photographs, etc., be sure to keep the original copy

CREATING DOCUMENT NUMBERS

A document number is the number you write on each source that you find for your family. There are two parts to the document number:

File name: The first part of your number is the name of the head of household for your family unit (same name as what is on the file folder tab). Example: Columbus Washington McKinney [1859-1932]

Next available number: Start over with the number 1 for each family. If you have seven documents in your family folder, then the next available number is eight. For example: Columbus Washington McKinney [1859-1932] #8