

GenGuides | DEVELOP AN ORGANIZATIONAL PLAN

by *Genwriters* | One that will grow as your research grows

As you begin your genealogical journey, a good organizational plan will prove to be your best ally. You will amass volumes of paper. Organizing these papers so that you can locate any document within minutes will improve your research results. Choose a filing system that you are comfortable with, one that you will faithfully use. Develop an organizational plan today that will grow as your research grows.

CHOOSE A FILING SYSTEM THAT WORKS FOR YOU.

There will be plenty of paper documents to file for each person you research. You will find birth records, death records, census records, wills, newspaper articles, social security applications, the list goes on and on. Your challenge is to develop a filing system that will enable you to lay your fingers on any document for any ancestor within minutes. You will also want a filing system that is flexible. Be prepared to make adjustments as you travel on your genealogical journeys.

The three most commonly used filing systems are:

- ♦ **BY COUPLE** ♦ All papers related to each husband and wife will be filed together
- ♦ **BY PERSON** ♦ A separate file for each person on your ancestral chart.
- ♦ **BY SURNAME** ♦ All papers for each surname are filed together.

Some files might become quite large depending upon the availability of resources.

Using any of the three filing systems above, you could further break down your papers into the following categories:

- ♦ **BY LOCATION** ♦ Separate papers by state, county, and/or town to reflect your ancestors' migration.

- ♦ **BY RECORD TYPE** ♦ Separate papers by record type (i.e., vital records, census records, notes from compiled family histories, etc.)

The filing system most commonly used by genealogists is to file By Surname. This method allows the greatest flexibility. To further organize the papers, most genealogists divide their surname files by location. Using this filing system, all documents collected for the Howell family when they lived in Boston would be filed in the Howell-Massachusetts file. The documents for the Howell family after they migrated to Albany would be filed in a separate Howell-New York file.



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THE RIGHT SUPPLIES CAN HELP YOU STAY ORGANIZED

Many genealogists use binders to store their papers while others prefer to use filing folders. Either method works equally well depending upon your personal preference. If you choose to use binders, you will want a separate binder for each surname (or couple or person, depending upon your organizational plan). All papers can be three-hole-punched and placed in the binder. You are less apt to lose papers using binders, however, as your research progresses you might quickly outgrow the binders you are using. You could potentially have two, three, or more binders for each surname (or couple or person).

You might choose to use filing folders to store your papers. You will want a separate filing folder for each surname (or couple or person). As your research grows, so, too, will your filing folders. As they become full, you might want to separate your documents according to document type or by geographic location by creating new file folders. Storing your folders will require either a filing cabinet or storage boxes. Your choice of storage will depend upon the amount of room in your house you can devote to these files.

Regardless of the storage medium, it is essential that you standardize the size of the paper you collect – the standard size is 8½ inches by 11 inches. All notes should be taken on this size paper, not on small scraps of notepaper or the napkin from lunch. Smaller snippets of paper are easily lost and can complicate your filing system. If you inherit notes on uncommonly-sized paper,

either photocopy them onto 8½ by 11 inch paper, staple them to a piece of the larger paper so that they conform to the rest of your notes, or insert them into an archival safe sheet protector.

When purchasing file folders, you can choose between plain manila folders or colored ones. For many, the choice of color is irrelevant. But for others, using a color-coded filing system is both functional and fun. If using colors helps you to be more faithful with your filing, then by all means invest in the pretty supplies. The nominal additional cost will be worth it in the long run.

THE BENEFITS OF BEING ORGANIZED

- ✓ There will be less duplication of effort. You will be able to quickly locate papers, and you can easily see where you have previously researched and where you should focus your next research efforts.
- ✓ Your files can be set up to mirror your research goals. You will easily be able to plan your next research step by reviewing your surname files.
- ✓ Your research will be more accurate. You are less likely to make errors when your research is rooted in a good organizational plan.