

# Organizing Genealogy on Your Computer

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## How Many Files Do You Have on Your Computer

- Open “File Explorer”
- Click on “Documents”
- Then right click on “Documents”
- Click on “Properties”
- This will tell you how many working folders and files you have on your computer

## The ‘Documents’ folder is your “Digital File Cabinet”

### Why Go Digital?

- Everything you get from Ancestry, FamilySearch, My Heritage, etc. is digital
- All the census images, birth, marriage and death certificates are in a digital format
- You can download all this great information and save it
- How do you organize all this information, so you can use it and find it?

### Working Document Types

- Word processing
- Spreadsheets
- Scanned photographs
- Digitized documents
- Digitized records
- Genealogy software files
- Legacy, RootsMagic, etc.
- File Extensions:
  - PDF
  - Graphics
  - JPEG, TIFF
  - DOC, DOCX
  - XLS, XLSX
  - TXT
  - RTF

### You Have Control

- Set up a filing system that works for you
  - There is no right system
  - It must make sense to you
  - It should also make sense to anyone who comes after you
  - Keep it simple so you can maintain it
  - Tell your software programs where YOU want to save the files
  - Many programs default to folders they choose
  - Most programs allow you to choose where you want the file to reside
  - If it is genealogy-related, place them in the genealogy folder you want

### Choose a Filing System

- Determine the type of filing system you want to use
- Your electronic filing system might emulate and/or mirror your physical paper filing system
  - If you have one, in your office or work area
- Duplicate your filing system across all platforms you use: computer files, email, bookmarks, etc.
- Keep it simple because you’re more likely to maintain it

## Genealogists Use Many Types of 'Filing' Systems

- File cabinets or boxes with hanging files and paper folders
- Three-ring binders/notebooks with tabbed sections
- Filing by the four main family lines:
  - Paternal grandfather
  - Paternal grandmother
  - Maternal grandfather
  - Maternal grandmother
- You can also file by the eight great grandparent's or the sixteenth great grandparent's
- File by surname, then by family, couple or individual
- Within those sorting by date or by record type
- Filing by surname, then by record types within the surname groups
- Filing by family groups related through collateral lines
- Genealogists Use Many Types of 'Filing' Systems
- Sorting by locality, then by family, group or topic in that locality
- Sorting by locality, then by record types for that locality
- Sorting by type of resource: records, reference materials, supplies
- Combinations or derivations of any of the above

> Genealogy - DNA	Brown Family Directory	3/12/2019 1:28 PM	File folder
> Genealogy - Education & Magazines	Glass Family Directory	1/14/2019 1:30 PM	File folder
> Genealogy - Family History Files	Horrocks Family Directory	1/15/2019 1:11 PM	File folder
> Genealogy - Forms	Pickering Family Directory	1/12/2019 1:17 PM	File folder
> Genealoov - Horrocks Early Research Project	X-Other Items	1/17/2019 9:48 AM	File folder

## Folder & File Naming – Part 1

- Your folder and file naming patterns might differ as you go from record type to record
- The most important thing is to include as much as you can in the name of the folder and file in order to:
  - Identify at a glance the contains
  - Be able to track down the original at a later date if necessary
- Include items in your names that you will understand
- They might include:
  - Year and/or date
  - Record type
  - Names
  - Places
  - Title of record
  - Repository
- Choose the order that makes most sense to you
- Surnames in all uppercase letters stand out and make it easier to read and differentiate between those and given names or place names
- Hyphens, spaces, commas, underscores, and some uppercase letters help make the name easier to read

## Scanned Photos & Digitized Documents

- Making electronic copies of photos and documents accomplishes several things
- They are backup copies of the originals, they can be easily shared with others, and you can print copies to take on research trips so that the originals stay safe at home
- There should be several sets of digitized images used in your research

## Master Copies

- Scan images at a high resolution as high quality TIFF files
- Make archive copies (Cloud, DVD, CD, flash drives, etc.) for preservation
- Distribute copies to other researchers and family members to preserve for the future
- Don't make any changes to the master copies
  - Use them only to make the working copies

- Where you keep the Master copies is up to you

### **Working Copies**

- Create working copies from the master TIFF copies
  - JPEG files give you flexibility
- Use the working copies to make printouts, to share online, to enlarge photos, to add text or to enhance damaged images

### **Printed Copies**

- Print copies to keep
  - In your paper filing system
  - In your research workbook
  - As one more form of backup copy
- Label printed copies with the name of the corresponding electronic file name

### **From Paper to Digital**

- In this day and age, the likelihood of your years of research being preserved for the future is in the digital world, not the paper world
- You will need to invest in some technology
- Assuming you have a computer with a genealogy based software program, you are part of the way home
- A 'sheet' scanner and flatbed scanner are a must
- This is a good sheet scanner, made by Fujitsu
- Flatbed scanners are very inexpensive these days and are used for photos and large documents

### **Backup, Backup, Backup**

- Now you have everything digital, or working towards it
- What happens when your hard drive fails, and it will
- All those hours of work are lost unless you have it backed up along with all those priceless photo and videos you have on your computer
- Backing up your data is very easy to do
- Suggestions:
  - Online storage like iDrive and Carbonite
  - External hard drive connected to your computer
  - Extra internal hard drive
  - Cloud backup like Dropbox and One Drive

### **Internet Browser**

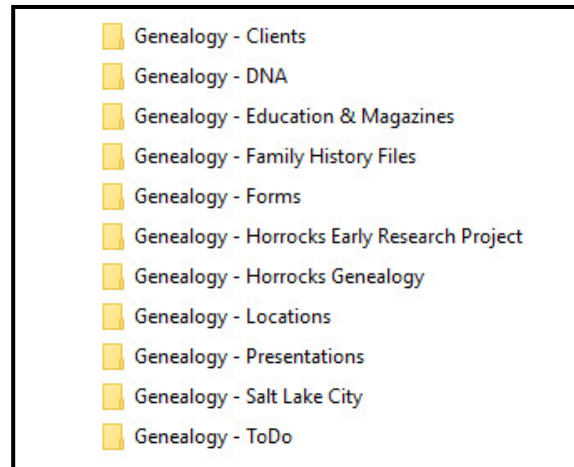
- Don't forget about organizing your internet browser
- This is where you go to get all the records for your research
- Organizing your browser will really help you in your research

### **Email**

- Don't forget to organize your email
- Make folders so you can easily find correspondence from a person
- If you use Outlook, just right click your email address and add a new folder
- Then search your inbox for say, a person
- Highlight all the emails from that person and drag them all into the new folder
- Now everything from that person to you is in one location so if you need to find it, you can
- You can also make sub-folders to be more specific

## Folder Naming – Part 2

- Naming the sub-folders in your main “Documents” folder is an easy way that you can always find what you are looking for
- There is no ‘correct’ way to do this, it is up to you how your mind works



## File Naming – Part 2

- There are numerous ways to name files
- I prefer the KISS method
  - Keep It Simple Stupid
- My format:
  - Date of the image/document
  - What it is: Baptism, Census, Marriage, Death
  - Who it's for: Name of ancestor
  - Location: City, State, County, Church, etc.
- This is an example of the files for my 4<sup>th</sup> great-grandparents baptisms and marriage at the Manchester Cathedral in Manchester England

Name	Date	Type	Size
1763 Baptism Alice Wallwork Manch Cath.jpg	10/10/2005 1:54 PM	JPG File	1,973 KB
1785 Marriage John Pickering & Alice Wallwork Manch Cath.jpg	10/10/2005 1:49 PM	JPG File	1,033 KB
1790 Baptism Catherine Pickering Manch Cath.jpg	10/10/2005 1:35 PM	JPG File	294 KB
1792 Baptism Charlotte Pickering Manch Cath.jpg	10/10/2005 1:39 PM	JPG File	501 KB
1800 Baptism Margaret Pickering Manch Cath.jpg	10/10/2005 1:41 PM	JPG File	412 KB
1802 Baptism Mary Ann Pickering Manch Cath.jpg	10/10/2005 1:44 PM	JPG File	1,822 KB
1803 Baptism Hiram Pickering Manch Cath.jpg	10/10/2005 1:47 PM	JPG File	374 KB
1881 British Census - Samuel Stott & Family in Liverpool.jpg	3/4/2005 4:13 PM	JPG File	393 KB
Thumbs.db	4/16/2015 1:59 PM	Data Base File	37 KB

Some useful links for organizing your computer:

<http://www.CyndisList.com/organizing>

<https://www.thebalancesmb.com/computer-file-management-tips-2948083>

<https://www.makeuseof.com/tag/creating-order-chaos-9-great-ideas-managing-computer-files/>