genealogybeginner
STEP BY STEP GENEALOGY GUIDE

Unit 1 - Lesson 3 - Getting Organized

Welcome to lesson three from Genealogy Beginner. You have begun the journey of researching your family tree, you can apply your new found knowledge of sound genealogical practices and you've begun to fill out your Family Group Sheets. You are off to a great start. It won't be long before you have more information than you are able to keep track of!

Now is the time to get organized.

The wise genealogist knows the value of good record keeping. Once you begin, it does not take long before you have accumulated large amounts of data, so much that it is not uncommon to lose track of what you have. That is why, before you go any further, you should set up your filing system.

In this lesson, we will discuss the various types of data you will be collecting, as well as several methods you can use to organize that data. At the conclusion of this lesson, you will be well on your way to having an effective structure from which you can base all future research.

Systems of Organization

Let's start with a quick look at the three leading systems of organization. In the following tables, you will see the three main methods for organizing your genealogy: file folders, binders and computers. Before you decide on which method you want to apply, let's consider some of the advantages and disadvantages of each.

Filing Systems

File Folders

Advantages	Disadvantages
Portable	Messy
Inexpensive	Takes up more room
Expandable (grows with you)	

Binders

Advantages	Disadvantages
Standardized (works with standard size papers)	*Not expandable (does not grow with your research)*
Portable	
Inexpensive	
Keeps things in order	

Computers

Advantages	Disadvantages
Saves space	*Changing technology (future computers may not support software for old systems)*
Easy to share information	
Can organize your information for you	

Out of these three, there truly is no one best way. The goal is to organize your information in the way that is easiest for you, so that you can find what you are looking for when you need it. We can sum this up in one thought: The best system is the one you will use, so don't be afraid to modify any of the methods to meet your own needs.

Document Types

Now let's take a look at some of the types of documents you will encounter as you continue with your research.

- **Birth, Marriage and Death Certificates**
- **Census Records**
- **Military Records**
- **Old Parish Registers**
- **Immigration and Naturalization Papers**
- **Cemetery Records and Inscriptions**

The best system is the one you will use, so don't be afraid to modify any of the methods to meet your own needs.

Many of the documents may be in their official form or as photocopies of the originals. In addition to these, you will collect various forms and charts regularly used in genealogy research, both in their completed state and as blanks ready to be used. You will need to create the appropriate files for each.

Some things that will also end up in your collection are:

- **Your own notes & correspondences**
- **Photographs**
- **Family Bibles**
- **E-mails**
- **Newspaper clippings**
- **Books & magazines**

Genealogical Organization Methods

So far, you have learned about three different types of filing systems and the range of documents that will be placed in them. There are also a few distinct methods for organizing your documents within those systems.

You can organize your data according to:

1. **Surnames:** Organizing your data by surname

2. **Family:** Organizing your data according to single family units (husband, wife and children)

3. **Lines of descendants:** Organizing your data according to family lines beginning with each of your grandparents

4. **Events:** Organizing your data according to birth, marriage, death, census and military service records

You can also organize by sub files:

A. **Locations:** Organizing your data according to town, county, state, country or their equivalent (province, district, etc.).

B. **Record type:** Organizing your data by type - all marriage records, census records, etc.

Practice

Now that you have an understanding of the details that will go into organizing your data, it is time to decide on which practices to employ. We are going to focus on the **binder technique** and **surname method** for now, as they are easy to understand and simple to use.

To start, you are going to need to gather some basic materials.

You will need:

- **Sturdy three ring binder**
- **Page dividers**
- **Highlighters**
- **Large tabs**
- **Marking pens**
- **Page protectors**

If you do not have them on hand, a quick trip to your local office supply store will get you well equipped.

Are you ready to start? Do you have all of your materials together? If your answer is yes, then it's time to get to work.

Let's begin!

Your Pedigree Chart (which you will create in the next lesson) will go in the front of the binder.

Label your first page divider/tab with the name of your immediate family.
- Put the family group sheet you did for your immediate family here.

Place a plastic sheet protector right behind it.
- Place any primary records or photocopies of birth, marriage, and death certificates in here with any other data or documents for this family group.

Label your next two folders/tabs with your parents' names – one for each.
- Add the family group sheets you have done for each in the appropriate places

Place a plastic sheet protector after each new folder.
- Place any primary records or photocopies of birth, marriage, and death certificates in here with any other data or documents for this family group.

Label your next four folders/tabs with the names of your grandparents.
- In alphabetical order – or, if your prefer, in birth order – place family group sheets for each of your parents and their siblings.

Place two plastic sheet protectors behind each grandparent's divider
- Use one to contain the primary records; the second is for additional data pertaining to your grandparents.

As you may not want to collect vital records documents for siblings – that is usually something we save for direct ancestors – you can also use the second pouch to hold information pertaining to siblings. i.e., photographs and/or news paper clippings.

You will follow this sequence as you move back through your family tree, adding new branches along the way. Remember to record and file any new information that comes along. Saving things "to be filed later" is always a bad idea.

In addition to the files you have made, you may want to add a couple of dividers for dead ends and curiosities that need to be followed up on at a later date.

Remember to record and file any new information that comes along. Saving things
"to be filed later" is always a bad idea.

Wrap-up

Today we have explored developing a system of organization that will carry you through many satisfying years of genealogy research. You now know the three main systems genealogists use to organize various types of data and the methodologies from which you may choose.

If you need any more help or have a question about this lesson, please post to the forum Genealogy Beginner Lesson 3 message board. **http://www.genealogybeginner.com/community/organizing-for-a-successful-search-lesson-3/**

In the next lesson, we will work on putting together your Pedigree Chart. In the meantime, get your preferred method of organization set up and file any charts or documents you may already have.

See you in the forums.

Articles: http://www.genealogybeginner.com/category/lesson-3-articles

Glossary: http://www.genealogybeginner.com/category/glossary

Forum: http://www.genealogybeginner.com/community/organizing-for-a-successful-search-lesson-3/