

Organizing Digital Genealogy

by Heather Wright

Most Important

- Backup your files
- Back them up again
- Figure out what works for you and stick with it
- Have you backed up your files?

What you can use for backups

- Cloud (Google Drive, Drop Box, etc.)
- Flash drive
- External hard drive
- Auto back-up
- With you and off-site is best

Digital filing system strategies

- By name of person
- By place of event
- By type of event (birth, marriage, death, graduation, etc.)

TIPS

- Abbreviations or codes are fine, it's your system, just make it clear for you, i.e.:
 - birth record = b_rec
 - birth certificate = b_cert
 - Washington and Jefferson College = WandJ
- Advantage to abbreviating: minimizes character count in case your program has a limit (Legacy Family Tree has a 260 limit, this includes folder names, not just the file name.)
- Use caution if you change a filename – does it matter?
If files are linked to a database, changing the name may have an impact.
You still may want to change it, just be aware of any consequences.

File by name: Surname folders

- Make a folder for each surname
 - Only a few entries for a surname?
Make a *misc people* folder - can separate names later if needed (be mindful of impacts)
 - Same surname, different place?
Leave all together or make multiple folders, i.e.:
 - Different states: *Smith-Virginia* and *Smith-Oregon*
(can abbreviate, *Smith-VA* and *Smith-OR*)
 - Same state, different cities: *Smith-Pittsburgh* and *Smith-Philadelphia*
(can abbreviate, *Smith-Pgh* and *Smith-Philly*)
- File name: **surname, first name_bdate-file info**, i.e.
Antonelli,Ada_1902-birth_rec
Dawson,Nancy_1814-US_Census-1870
Speer,Frances_1866-obit1-ThePghPress-15Aug1956
 - unknown birthday? *Lambing,Ann_c1914-HS_pic-1932*
If birthdate is found later:
keep filing with "c" date for consistency or change all files and fix any impacts

TIPS

- Don't create folders by person and nest generations, creates confusion and longer path names.
- Don't have a folder for a person and dump their files in named *birth, death, marriage, etc.*
Can create confusion for software and you, every file name should be unique.
- Keep women as maiden name. Changing creates confusion, especially with multiple marriages.
- File census record with head of household (or file by place)
- Use meta data for notes (where you found a record, photo credit, etc.)
- If there's a year in the file description, separate it from the birth year so it doesn't look like a date range, i.e.

Reed,Colin_1885-yearbook_WandJ-1904-pic

NOT

Reed,Colin_1885-1904_yearbook_WandJ-pic

File by type

- **Directories** - City, Social, Professional, etc.
 - City Directories are sorted by place-date-page
FL-DaytonaBeach-1941 (title page for source info)
FL-DaytonaBeach-1941-p86-87 (page interested person is on)
 - Others vary
SocDir-PA-Greater Pgh-1905 (1905 social directory for Pittsburgh title page)
Congress-31-p7 (31st US Congressional directory, page 7)
Can make these more like City Directories:
PA-Pittsburgh- Greater PghSocDir-1905
WashDC-Congress-31-p7
- **Locations** - reference maps, residences, churches, etc.
After running into the same place for multiple people I found it easier to keep them separate instead of with each person in their surname folder.
 - DE-Wilmington-Old_Swedes_Church-1
 - PA-FranklinTwp-FayetteCo-land_ownership_map-1872
 - PA-Pittsburgh-5618_WoodmontSt
 - WV-BerkeleySprings-Washington Hotel
- **Church Records**
Same idea as City Directories:
 - PA-Washington-1stPresb-Bap-p14-15
 - PA-Brownsville-RedStoneBaptChurch-rec_book
- **Miscellaneous**
It's a catch all at the moment, likely to be divided out as it grows. Named *sources*, it includes:
 - correspondence (emails, letters)
email-Speers,Frederick-saved8Apr2018
 - items cousins have shared with me
 - family association information
 - other random items I saved but didn't have a great place for them.
Blair,Karyssa_RIN12726-FTDNA_family_tree-snip
SpeerWhiteSandWorks-ad

File by event

This works for some but my brain wants to look for the person first, not the event. This may work for you:

File censuses by place: PA-Allegheny-Pittsburgh...

File records by type: Birth-Surname,first name...

Death- Surname,first name...

Other Items

Books

- If possible, download a pdf copy.
- If I've taken photos or screen grabs: make a folder, ideally name each with page number but at least image number to keep in order.
- Made an index to know what you have and if you've gone through it.
I include the book name, if it's in my genealogy program source list, if I've downloaded it (if I have photos I'll put *jpgs* here), where I found it, if I've worked through it, and any notes.
I've started color coding as the list grows.

	book	in source list	downloaded	source	gone through	notes
1						
50	History of the Presbytery of Washington (PA)	N	pdf	Internet Archive	NO	Finley p. 397
51	Hovermales of Morgan Co., WV; Bath Co., KY, and Wash. Co., MD	Y		book, Berkeley Springs lib	NO	
52	HovermaleRupenthalBorherMiller binder	Y		book, Berkeley Springs lib	-----YES-----	
53	Johann Christian Hovermale book	Y	NO	book, Berkeley Springs lib	some	made a list of images need to redo next time there
54	List of Motor Vehicle Registrations and Licenses	Y	pdf		NO	only got Florence Trumpe out of it, RIN 1458
55	Maryland records , colonial, revolutionary, county and church : from original sources - Vol. I	N	pdf	Internet Archive	NO	maybe some Dawson info

templates

I transcribe everything and keep templates to make it a little quicker, includes:

- birth records
- marriage records
- death records
- censuses
- draft registrations

other items

Excel – or another spreadsheet program – is a great tool

- research log
- contact list
- research checklists
- DNA – groups and cousins
- to do lists