

# Taming the Chaos

## Organizing Your Genealogical Research

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Whether you're a seasoned researcher with overflowing file cabinets or a curious newcomer, it doesn't take long to feel overwhelmed by all the ancestors, much less all their records.

Are you thinking to yourself THIS time you will finally get your genealogy files and research organized? A successful genealogy organization system is one you build for yourself and use consistently. Take that to heart. Internalize it!

### Habits are Key!

There is no one correct or magical way to organize your genealogy files and research. The best organizational system is one you use consistently. That consistency is key.

File that document, label that photo, update your tree – each action builds a bridge through the research process. Soon, organization becomes second nature, saving time, frustration, and fueling your passion. Again, consistency is the key – embrace the journey, celebrate your progress, and watch your research thrive! Now go, organize, and conquer!

### Name That File

Determine ahead of time how you will label your folders and documents. Ask yourself how *you* will search for that file in the future. For instance, will you search by name, year or location? This is especially helpful for locating digital files. Cloud storage services like [Google Drive](https://www.google.com/drive/) and [Dropbox](https://www.dropbox.com/) have robust search features which make it easy to search and filter results when searching for your record.

Create a “formula” for how you will name your files. For example, naming an ancestor’s census record could include:

**[Year] + [Document] + [First Name] + [Last Name] + [Location]**

The 1880 census for Bossy Talbott would be labeled:

**1880 Census Bossy Talbott Halifax Co Virginia**

**Genealogy Tip:** Be consistent in the naming of files for your paper and digital files.

## Create Your File System

Digital and paper files can be filed using the same simple nesting folder system. This keeps your filing simple and organized. No need to maintain more than one filing system. Here are 2 different examples of a nesting folder system.

### Organize Files by Surname

- **MAIN SURNAME (Talbot)**
  - **Births**
    - Joseph M. Talbot
    - Boss Henry Talbot
    - Charles M. Talbot
  - **Deaths**
    - Joseph M. Talbot
    - Boss Henry Talbot
    - Charles M. Talbot
  - **Marriages**
    - Boss Talbot/Esther Richardson
    - M. Talbot/Rosa Bowen
  - **Census Records** [Add each census year you have records for.]
    - 1790 - David Talbot, Matthew Talbot
    - 1800 - David Talbot
  - **Military Records**
    - Revolutionary War
      - David G. Talbot
    - War of 1812
    - Civil War
      - John B. Talbot

### Organize Files by Household

- **MAIN SURNAME (Talbot)**
  - Individual Ancestor (*Boss Henry Talbot*)
    - **Birth, Marriage, Death Records** (*Family Bible, Marriage License, Death Certificate for BHT*)
    - **Census Records** (*1900-1940*)
    - **Military Records** (*Draft Card*)
    - **Wills & Estate Records**

- **Records for wife during their marriage years** (*Esther Lee Richardson Talbott*)
- **Records for children while living in father's household.** [Once a child leaves the father's household, the male child gets his own folder. A female will go into her husband's folder from the point of marriage.]
- Individual Ancestor (Joseph Merritt Talbott)
  - **Birth, Marriage, Death Records** (Family Bible, Death Certificate)
  - **Census Records** (1860-1940)
  - **Military Records** (None)
  - **Wills & Estate Records**
  - **Records for wife during their marriage years** (*Rosa Bowen Talbott*)
  - **Records for children while living in father's household.** (*Boss Henry Talbott*)

## Organize Your Searches

A genealogy research plan is not a magic wand, but it is a practical roadmap that sets clear goals, saves you time, and helps you stay focused on your ancestor search. It is crucial to your success in finding your ancestors, but does not have to be complicated.

An efficient genealogy research plan includes:

- The research question (i.e. what you are searching for.)
- The records you need to search for.
- The location of those records. Include online and offline records
- Notes pertinent to your current and/or future search.

**Tip:** At the end of your research session, make a note to yourself on where to start your research next time you sit down to research. This allows you to pick your research up right where you left off.

Family tree softwares (such as [Family Tree Maker](#)) have sections where you can list out your plan or tasks for researching individual ancestors. Take advantage of this feature.

Research plans can also be created using a simple spreadsheet, and in their simplest form, simply written on a sheet of paper.

Here is an example of a sample research plan using a spreadsheet ([Google Sheet](#)):

Research Goal		Who was the father of Emma Della Thomas Howard/Harward born 1858 in Moore County, North Carolina?				
Spouse:	Allan Suggs Howard [Harward]		DoDeath:	10 Aug 1929	Where: Moore County, NC	
Marriage date and place			Other:	Lee County, NC should also be searched		
Notes - Emma was born out of wedlock per family history; Lamar Shepard is rumored to be Emma's father						
Date	Record to Check	Location/Website	Notes/Results	Answer Q?	Next?	Scheduled?
1 Jan 2021	1850 Census - Moore County	<a href="#">Ancestry.com</a>	Living with mother Mary Thomas in Moore County	No	Is Lamar Shepard in close proximity to Mary Thomas?	
1 Jan 2021	1860 Census - Moore County	<a href="#">Ancestry.com</a>	Living with husband Alan Suggs Harward. [Note: Howard and Harward are interchangeable at this time in Moore County. Alan Suggs Harward AKA Suggs or Suggy]	No		
1 Jan 2021	Family Bible	Cousin Mickey has a copy - will need to contact	Emailed Cousin Mickey to set up time to see the family Bible		Waiting to hear from Cousin Mickey	
1 Jan 2021	Oral History	Cousin Bille, Cousin Otis, Cousin Mildred, Wicker family cousins	Need to get emails and/or phone numbers for these cousins to set up time to talk.			
2 Jan 2021	NC Marriage Records	<a href="#">Ancestry.com</a>	Father not listed	No		
15 Jan 2021	NC Death Certificate	NC Archives	Father listed as "not known"	No		
	Bastardy Bonds	NC Archives	None found - did not expect any	No		
Start here	Court Records	NC Archives				
	Church Records	Oral Hx, Presbyterian church in Lee County	Offline - will need to reach out to them. Are there Shepards there, too?		Visit church	1 Aug 2023

## Now It's Your Turn

- Create your file name formula(s)
- Decide on your file hierarchy system
- Create your research plan!