

Conquering The Paper Monster Once and For All

Step 1: Admit you have an organization problem

Step 2: Create a Plan

What Are We Organizing?

- Basic Forms: Pedigree Charts, Family Group Sheets
- Other Useful Forms: **Research Goals, Ancestor Timeline, Microfilm to Order Sheet, Google Books Search Sheet, Internet Research Log**, Census Abstracts
- Photocopies & printouts of books, websites, and records
- Letters and emails with genealogy information or correspondence
- Original records

How to Store the Papers

- File Folders and filing cabinets or boxes
- Binders, dividers, page protectors

Dividing & Subdividing Up Your Papers

- How do you think of your ancestors?
 - Surname? Location? Record Type? Couple?
- How do you think of the details of your ancestors?
 - Individual? Couples? Location? Record Type?

Storing the Paper

- Advantages and Disadvantages

	Advantages	Disadvantages
Binders	<ul style="list-style-type: none">• Standardizes papers to one size• Portable• Doesn't require a filing cabinet• Keeps everything in order	<ul style="list-style-type: none">• Can be very heavy• Can become cumbersome after gathering lots of data

File Folders	<ul style="list-style-type: none">• Inexpensive• Portable• Holds papers of many sizes• Flexible and expandable	<ul style="list-style-type: none">• May cause a mess when dropped – papers out of order and possibly misplaced• Must be diligent about putting papers back in exact spot.
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- Tips for Using Binders
 - Never get more than 2 inches wide
 - Get the “view” ones – where you can put a piece of paper to label the binder
 - Always use page protectors so that you do not have to hole punch any papers

Documents That Apply to More Than One Person

- Option 1: Make a copy and place one in each file
- Option 2: Place the document into the file of the main person the document is referencing and then place a reference sheet in the other file.

Filing Documents about Collateral Ancestors

- Always file documents about collateral ancestors
 - When researching your ancestors, sometimes it is the people around your ancestor that provide you with clues or answers to missing pieces.

Filing Papers of Different Sizes

- If using file folders, you could file everything in legal size file folders
- Put the original legal size records in archival boxes and create a reference sheet for your files. You could also create a smaller copy of the record for your files.

Step 3: Creating Piles

- Begin dividing your papers up into piles based on what you decided on earlier.
- Then begin dividing each of your piles based on how you decided to subdivide.

Don't Get Overwhelmed

- Break big tasks into smaller tasks
- Schedule time to organize
- Create a reward for yourself

Step 4: Buying Supplies

- Keeping the amount of paper you have in mind, go out and buy the supplies you need to house your papers. Example: file folders, hanging file folders, file box, etc.

Color Coding

- Can add an extra layer of organization
- Used mostly when organizing by surname
- Pick 4 or 8 colors (one for each line of your grandparents or great grandparents)

Archival Supplies

- Prolongs the life of your papers
- Generally more expensive than regular products
- Look for terms such as:
 - Polypropylene
 - Polyethylene
 - Lignin-Free

Tips for Buying Supplies

- Purchase sturdy and good quality products that will last longer
- Oversized dividers are important for binder users
- Label everything!
- Show your personality

Step 5: Welcome to Your New Home

- Put each file away in the new home

Tips for Staying Organized

- Keep notes on the same size paper
- Put your papers away. Pick a time to do it and stick to it.

- Schedule time every week or month for catching up on filing, re-evaluating your needs, or buying more supplies.
- **ALWAYS have a backup plan in place.**
 - Scan every document and keep on your computer in a computer filing system. Attach documents and pictures to your genealogy program
 - Backup your computer filing system and genealogy files by using an external hard drive (under \$100), flash drives, CDs, or a remote backup service like Mozy (2GB free, \$4.95/month for unlimited backup at www.Mozy.com) or Carbonite (Unlimited backup for \$54.95/year at www.Carbonite.com)

Step 6: The Secret to Organization

- Organization is a PROCESS that requires DEDICATION, COMMITMENT, and PERSISTENCE.
- Do your best to put your papers away as soon as you are done researching or before you begin researching.
- Re-evaluate your system every 6 months – 1 year to be sure that it is working for you. Change it if it isn't.