

## [Getting Organized for Research to Accelerate Your Progress!](#)

Taking the time to get well-organized now will save you time later, and it will help you research your ancestor lines efficiently. Here is a good overview of [getting organized with your genealogy materials](#). Why is organizing genealogy stuff perpetually challenging for so many of us? Maybe because finding new ancestry information is more fun than logging it. And organization isn't a one-way-fits-everyone kind of deal—the system and tools best for you depend on how your brain works.

Over time, every genealogist has to confront the issue of organization, but the sheer number of ways to organize (and the amount of material we collect) can make it intimidating to start and maintain an organization method. Throughout the years, *Family Tree Magazine* readers continue to share their best advice for avoiding getting buried under mounds of family photos, vital records certificates, census page printouts, family tree charts and other records. Here are nine of their best.

- **Keep the big picture in mind.** You can use genealogy charts such as five-generation ancestor charts and family group sheets to help you visualize how your relatives fit together, or try an online family tree builder with an app on your smart phone. *Family Tree* magazine offers 61 free forms to best meet your strategy needs. Click [here](#) for these forms.
- **Take charge of paper files.** Photos. birth, death and marriage certificates. Printouts of census records. Family tree charts. Newspaper clippings. Paper documents can really pile up, but readers have several ways to tame that plethora of paper. One option is to use three-ring binders with plastic sheet protectors (look for those made of archival-quality materials, and avoid PVC) and divider tabs. Plastic sheet protectors can store not only family group sheets and documents, but also cards, newsletters, CDs or DVDs and other mementos.
- **Go digital.** To save space in paper files or create electronic backups, scan your documents and photos. There are many different scanners, printers with scanners, portable scanners and scanning apps available.
- **Establish an organization routine.** Maintaining an organization system may seem daunting, but if you regularly take short chunks of time to put papers in the right place or scan papers, it becomes second nature. Once you return from a library research session, take a few minutes to file paper copies or scan them. If needed, set up an inbox in your office for items you need to take action on (scan, label, number, etc.) and a “to file” box for papers and photos ready for you to put away. Once a week or month, schedule time to empty the boxes.
- **Take advantage of tech tools.** You can organize with tons of tech tools and apps, such as *Evernote* for tracking information and research findings, *Calibre* to manage e-books, *Flickr* for photos, and *Excel* spreadsheets for checklists and logs.
- **Designate a workspace.** Having an organized workspace can help keep your genealogy files organized, too! Your workspace may double as a guest bedroom, dining room or other room in your home. Instead of relegating all your files to a closet or storage room, find creative ways to incorporate them into your home's décor. Use antique tins, decorative hat boxes or pretty photo boxes to store letters, postcards and photos (just make sure they're archival quality containers). Add a small, adhesive label to the bottom of the box or tin with a brief description of its contents. If you choose to use file cabinets, type and print a table of contents and attach it to the front of each drawer. When you add something, handwritten it on the list.
- **Color-code folders and files.** You can take different approaches to this method. One idea is to use a color for each surname, though you'd probably run out of colors before too long. Instead, color code by branch with a different color for each of your grandparents' lines. Color-code computer files and folders to match: On a Mac, click on a folder or file in the finder window and then click the down arrow next to the gear icon. From the drop-down menu, select Label and the color. PCs don't have built-in folder color-coding, but you can download a program such as [Folderico](#).
- **Use a numbering system.** A numbering system for relatives also can help keep you organized. Use a combination of numbers and letters for more flexibility. For example, label the oldest child in each family No. 1 with his or her spouse 1A. Then list children in birth order beginning with No. 1a, 1b, 1c and so on. The next eldest sibling would be No. 2 and the spouse 2A, with children 2a, 2b

and 2c, and so on. Note that the spouses use uppercase letters and the children use lowercase letters.

- **Create a kit for on-site research.** Prepare a bag with tools you might need for research at a repository: notebook, pen, pencil, money for the copier, flash drive, a family group sheet, surname variant lists, blank census or passenger list recording forms, etc. Now you won't have to run around gathering stuff when you leave for the library.

## Closing Comments

Taking the time to get well-organized now will save you time later, and it will help you research your ancestor lines efficiently. Here is a good overview of getting organized with your genealogy materials. The reason I subscribe to *Family Tree* magazine is because it is loaded with abundant "how to" user-friendly articles that address how to become a better genealogist. Click here to [learn](#) more about these tips presented in more depth in this article found in *Family Tree* magazine entitled: "*9 Habits of Highly Organized Genealogists.*"

The *Family History Guide* also has a series of tutorials devoted to "Getting Organized for Research." Click [here](#) for these five hands-on tutorials with their individual topics well defined below.

1. "Organize your materials."
2. "Create and use to-do lists to keep on track with your research."
3. "Use notes, logs, and software to stay organized as you research."
4. "Keep track of your correspondence with others and write effective request messages."
5. "Use pre-printed charts to help you organize your research efforts."

The fact is all of us need to be well organized whenever dealing with our genealogical endeavors. Hope these ideas contained in this post can be beneficial to you. Good luck and curious to learn which of these tips are particularly helpful to you.