



Organize Like an Archivist: Taming Genealogy Records & Research

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This presentation helps you put your family history research and records in order. Learn simple and effective strategies to organize and link your digital files and paper records, using the same principles as professional archivists. No need for color codes, numbering systems, or other complicated schemes with this archives-based system.

Thinking about *all* of the contents of your genealogical research helps you determine the overall structure of your filing and retrieval system. Librarians and archivists refer to this as *taxonomy*, or the practice and science of classification.

1. Top Organizing Concepts from Archivists

- A. Consistent Data Entry
- B. Consistent File Names
- C. Controlled Vocabulary
- D. Authority Files

When entering data in your family tree software or naming digital downloads or scans, data should follow consistent naming conventions. Archivists and librarians call this *controlled vocabulary*.

- To name downloads and scans, work from a basic structure:
SurnameForenameRecordType.fileformat
- RossMaryBaptism.tif
- SmithJohn1849Death.jpg
- SmithJohn1942Death.jpg

2. Master Genealogy Folder

- A. Administrative
- B. Family Tree Files
- C. Family Photographs
- D. Primary Sources
- E. Secondary Sources
- F. Surnames

3. Linking Digital and Paper Records

Write digital file name on the back in pencil after scanning and add to citations in your tree to track your scanning and link your files. Distinguishing between scanned and paper records avoids duplication of work.

4. Cloud Storage and Automated Backups

Because you cannot foresee the disaster that threatens your data, back up your computer to two places: a local external drive and a cloud account. Use software to automate your backups incrementally.

Additional Resources

eBook: *[Organize Like an Archivist: Taming Genealogy Records and Research](#)*

Go deeper into the simple and effective strategies to organize and link your digital files and paper records.

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Jane's eBooks:

www.sassyjanegenealogy.com/shop/

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