



Easy File Organization

Here are some guidelines for you to follow. Ultimately, it is up to you as to how you organize your files, but whatever you do, be consistent in your process. Just like your Research Notes, your files are constantly being updated. As you work on each line of the family, continue to clean up your files as you work in them.

Connie's Rules

200 Year Rule

Here's my 200 Year Rule. Can someone navigate your records, notes, and files WITHOUT A FINDING AID? Do you have a complicated numbering system?

Can future generations, long after we're gone and will have little understanding of the family structure, find their ancestors in your files easily?

Are you using an obscure platform, electronic notebook system, paper files, or some other system that won't be around 200 years from now? Give it some thought.

Filing

This is the filing system that I have used for decades. It works great. You do you! If you have a filing system that has been working for you, then go for it. However, if you need a system, these guidelines are a simple filing system to help keep your genealogical files organized and fits with the 200 Year Rule.

File Folders

In this filing system everything is filed by three categories, Surname, Locations, and Subject. While we're mainly talking about digital files, this filing system can be used for paper files as well.

Highest Structure

- Locations
- Subjects (if needed)
- Surnames

Locations & Subjects

To get the locations and subjects to the top of your explorer window (when sorted by name), use numbers in front of the folders and file names to organize the folders in the order in which you want to see them.

- 1 UNITED STATES
- 2 EUROPE
- 2 FORMS AND TEMPLATES
- 3 Research Plans
- 4 DNA PROJECTS
- 5 COMMUNICATIONS
- 6 Genealogy Forms
- 7 Genealogy Education
- ANDERSON
- Archives Index
- BAILEY
- BECK-BECH
- BOOTH
- BOWEN
- BUCKINGHAM - McGOWAN



Any folder that has other folders within it are in all caps. First are locations, followed by projects and active research plans.

Location Folders

Location folders hold document, maps, general information you've collected specific to an area, but do not contain family specific documents. They are information folders only.

The file hierarchy is by **country**, then by **state/providence**, then by **county/district**, and sometimes even to the **city/town** level. Within the location folders are typically things on a broad scale, like maps and general research information. The only time you need to break a folder into subfolders is if you have so many items that the list is getting too long to read through quickly. Breaking it up by sub topics helps you find things rapidly when you're in research mode.

This is the structure for my digial folders. Each line here is a folder that contains documents. Again, ALL CAPS for folders that contain more folders inside. Upper and Lower case if there are no sub-folders, just documents.

- UNITED STATES
 - Kansas
 - NORTH CAROLINA
 - Carteret County
 - Edgecombe County
 - Iredell County
 - Martin County
 - Perquimans County
 - Randolph County
 - Wilkes County
 - OHIO
 - Steubenville
 - West Virginia
 - Viginia
 - WYOMING
 - Albany County
 - Laramie County
- EUROPE
 - DENMARK
 - FRANCE
 - GERMANY
 - IRELAND

Subjects

Subjects are going to be unique to your situation, but are typically research subjects like "how to" materials or things like Quaker Research Tips, or where to find XYZ topics. They might contain

information you picked up and scanned at a genealogy conference. Yes, I scan that stuff. I can't stand having papers around that are clogging up my office. This is your choice. There are no hard and fast rules on subjects.

Sub-Folders

> 1 GENEALOGY ARCHIVES Docs and Images > 1 UNITED STATES

Name	Date modified
CENSUS	6/28/2022 11:28 AM
EASTERN US MAPS	1/24/2021 1:18 PM
KANSAS	6/28/2017 6:33 PM
NORTH CAROLINA	3/25/2022 1:46 PM
OHIO	8/4/2017 8:50 PM
WEST VIRGINIA	8/4/2017 9:05 PM
WYOMING	12/20/2020 1:57 PM

Surname Structure

All ancestors go into master SURNAME folders (in all caps). Within each surname folder is individual ancestor folders (when there is more than one ancestor by that surname).

Surname Sub-Structure

Individual persons have a subfolder within the SURNAME folder. Beginning with SURNAME (in all caps) followed by First name and Middle name. For example, HENLEY Constance Marie. This allows for the alphabetical column to sort by Surname then by first name making it super easy to find your ancestors folder quickly.

KNOLLYS
KNOX FAMILY
LAURITZDATTER
LIND DEIMEL
MADSEN
McCOY
MILLER
MILLER WARREN
NANCE
NEWBY
NIXON
PENDER
PERKINS
PLUMMER
PLYMALE
MADSEN Alma
MADSEN Bernice
MADSEN Carol
MADSEN Christopher
MADSEN Donald
MADSEN Doris
MADSEN Emails and Stories
MADSEN Family
MADSEN Frances Louise Pharris
MADSEN Hans and Dorethea or Dora
MADSEN Herman Miller
Madsen Houses
MADSEN Karsten
MADSEN Lawrence Larry Bud
MADSEN Leah
MADSEN Nels
MADSEN Nina

Birth Names

Always file by birth names if you know it. That is simple. Even after a woman marries, file her notes and records by her birth name. If there are records for both husband and wife, you can create a SURNAME [hubby] – SURNAME [wife] folder for both or just copy the documents into both of their folders (is what I do).

Women

If a woman is only known by her married name, then the subfolder (under her husband's SURNAME folder) would be titled MADSEN Dorethea. Once a maiden name is learned, rename the folder to reflect her Maiden name and move it under the master surname folder at the higher level.

Couples

Often, if I don't have enough individual documents to warrant individual folders, I will create a folder for a married couple. That Surname folder might look like JONES – LAWRENCE (his surname followed by her Maiden Surname).

Always starting with the male surname when using multiple surnames, will be the general rule. Knowing this will help you locate records quickly.

5 Second Rule – When to Divide Folders

I generally divide folders into subfolders when there are too many records for me to find something at a quick glance (if it takes me longer than 5 seconds to find it). It's my 5 Second Rule. 😊

Plus, it will take me about 30 seconds to create new folders and slide the documents into sub folders, saving me tons of time later. When I'm in the research zone, I don't want to dig for documents. I want them at my fingertips.

Family Groups

Use Family Group folders when you have documents or images with lots of people. For example, a wedding registry, family group photos, etc. Add a document identifying the people in the image. I typically put the names right in the file name "Knox Family LtoR Top Row Walter-Edna..."

SURNAME Family Subject

- 📁 KNOX Family Bible Images
- 📁 KNOX Family Groups ←
- 📁 KNOX Family Thanksgiving 2008



If you don't wish to copy the document into each individual person's folder, put a note in your research notes with a path to where you can find it. I suggest you put a copy in your direct line ancestor's folders as well.

People With Unknown Surnames

If you only have a first name for a person, I suggest you file it under the previous generations known surname. In other words, he/she is likely the parent to someone else and should be filed under that child's master surname folder until the birth name is known.

Document Structure

Scan As You Go

There are so many options for easy scanning these days, even using your cell phone can be super easy. I now use the [SnapScan scanner](#) sold by Vivid Pix. It has changed my life. It is so fast and easy, I love it.



Documents

Documents follow a similar structure to folders. They start with the “**SURNAME First Middle**” then a hyphen followed by **subject** and **year** of the document. If there is room a simple **source** is added.

SURNAME First Middle - Subject – Document Year – Source

- MADSEN Chris – Becomes President Danish Brotherhood Laramie - Republican (Daily) no. 102 Dec 09, 1916, pg 2.pdf (this was a newspaper).
- MADSEN Chris – Passenger List 1873 – Image from Ancestry.jpg

- MADSEN - Gem City Grocery Company
- 1 MADSEN Christopher - Research NOTES.docx
- 2 MADSEN Christopher - Research LOG.docx
- 3 Christopher Madsen Research Report - Proof of name Madsen in US Documents.docx
- 3 Source Citations for Christopher Madsen.docx
- CRUMLEY CROMWELL RESEARCH .pdf
- MADSEN - Alma M Conard Obituary Index- GenealogyBank.pdf
- MADSEN - JOHNSON Daily Boomerang Newspaper 1913 Johnson wedding anniversary surprise party.pdf
- MADSEN 1880 Census Clip.JPG
- MADSEN Alma - Person Details for Alma M Conard, _United States, GenealogyBank Obituaries, 1980-2014_ — FamilySearch.pdf
- MADSEN and TEGNER ballbearers in 1917 Larmaie Republican no 53, 7 Mar 1917, p 4.JPG
- MADSEN C - Death Cert (2).jpeg
- MADSEN C arrives from Chugwater WY 1921 Cheyenne newspaper newsbank dot com.pdf
- MADSEN C arrives from Chugwater WY 1921 full page with citation - genealogybank.pdf
- MADSEN Chirstopher - HANSEN Mads and family 1860 Census Denmark with Parents sa.dk see research notes.JPG
- MADSEN Chris - Laura - Herman - Frances Land Records Laramie WY 04302017.pdf
- MADSEN Chris - Laura - Herman - Frances Land Records Laramie WY 04302017_0001.pdf
- MADSEN Chris - Laura - Herman and Frances Land Records Laramie Various Dates 04302017.pdf
- MADSEN Chris and Herman CRUMLEY Rollie timeline ranch in Laramie WY05062017.pdf

Use the spelling exactly as it is in the document. Note below Chris is spelled “Christ,” as it was in the document (short for Christopher).

- MADSEN Christ – Declaration of Intent last page and JOHNSON Anker Coroners Report - 1924 – WY State Archives.pdf

There will be times when you can’t fit all the information in a file name because it exceeds the size limit.

Research Notes - Briefly

Create Research Notes for **each ancestor** in a **Word (or similar) text document**. This will also follow the 200 Year Rule, in that it will likely be readable 200 Years from now. Think about the technology you use and its longevity.

RESEARCH NOTES FOR CHRISTOPHER MADSEN

Abstract: 1865, line 13, Christopher Madsen, Lindesle, father Mads Hansen, Lind, Lindesle, born in Lindesle on 9 of August 1850, in the vaccination column there are no recognized marks, far right-hand column, 1134, 44.

4 March 1873 Chris sails from Rudkobing, Svendborg, Destination New York on an indirect route.

12 March 1873 Departed Liverpool for New York aboard Steamship Nevada.⁶

25 Mar 1873 Chris sails from Liverpool on SS Nevada for New York. Ancestry.com. *New York, Passenger Lists, 1620-1957* [database on-line]. Provo, UT, USA: Ancestry.com Operations, Inc., 2010.
Original data: *Passenger Lists of Vessels Arriving at New York, New York, 1620-1897*. Microfilm Publication M237, 675 rolls. NAI: 6256867. Records of the U.S. Customs Service, Record Group 36. National Archives at Washington, D.C. *Passenger and Crew Lists of Vessels Arriving at New York, New York, 1897-1957*. Microfilm Publication T715, 3692 rolls. NAI: 3005346. Records of the Immigration and Naturalization Service; National Archives at Washington, D.C. *Supplemental Manifests of Alien Passengers and Crew Members Who Arrived at New York, New York, Who Were Inspected for Admission, and Related Index, compiled 1887-1892*. Microfilm Publication A3461, 21 rolls. NAI: 3587372. RG 85, Records of the Immigration and Naturalization Service, 1787-2004; Records of the Immigration and Naturalization Service; National Archives, Washington, D.C. *Index to Alien Crewmen Who Were Discharged or Who Deserted at New York, New York, May 1817-Nov. 1857*. Microfilm Publication A3417. NAI: 4487925. National Archives at Washington, D.C. *Passenger Lists, 1862-1972, and Crew Lists, 1848-1972, of Vessels Arriving at Oswego, New York*. Microfilm Publication A3426. NAI: 4441521. National Archives at Washington, D.C.*

25 Mar 1873 *New York Herald*, Tuesday March 25th, 1873—Quadruple Sheets
“Steamship Nevada (Br), Forsyth, Liverpool March 12 via Queenstown 13th, with Madsen and passengers to Williams & Quion.”

⁶ https://www.sa.dk/ao-sogesider/da/billedviser?pejdt=17137931417996_30524975 Page 6, image 8, line 13. Confirmation of Christopher Madsen, son of Mads Hansen.

⁷ Rigsarkivet [Danish National Archives.] “Danish Demografisk [Danish Demographic] Database, DDD Emigration Database.” online database, Dansk Data Arkiv, [ddd.dds.dk/databaser.html]. accessed 18 June 2017]. Udvalgte (Walked) > [Gå til søgning](#) (Go Search) > Navn (Name) “Madsen, Christopher”, entry for Christopher Madsen of Rudsjøløng, Denmark, Ikonid (ID code) 17273M1402, registration 4 March 1873, contract no. 20390. Also, “Denmark, Emigration Index, 1848-1908.” Ancestry (<http://www.ancestry.com>). accessed 18 June 2017, entry for Christopher Madsen.

⁸ “New York Passenger Lists, 1820-1957,” database, Ancestry (<http://www.ancestry.com>). accessed 18 June 2017, entry for Christopher Madsen, age 12, arrived from Liverpool, England 25 March 1873.

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RESEARCH NOTES FOR CHRISTOPHER MADSEN

ARRIVALS.

REPORTED BY THE HERALD STEAM YACHTS AND HERALD WIRELESS TELEGRAPH LINE.

Steamship City of Paris (Br), Mirabeau, Liverpool March 12 via Queenstown 13th, with mdsen and 563 passengers to J. S. Davis. Arrived at 6:24 A.M. 1st variable weather; March 30, lat 41 30 N, lon 48 20 W passed a three-masted steamship bound east; 2:30 P.M. a steamship showing three rockets (supposed Allan), 40; 9 A.M. 272 miles east of Sandy Hook, Steamship Baltic (Br), hetero for Liverpool; 9:50 A.M. 200 miles east of do, steamship Ville de Paris, hence for Havre; 11:05 A.M. a bark-rigged steamship, bound east.

Steamship Nevada (Br), Forsyth, Liverpool March 12, via Queenstown 13th, with mdsen and passengers to Williams & Quion.



22 Aug 1876 Marriage Record – Photocopy of handwritten document exists in my archives. Could be a handwritten copy or original.⁸

⁸ BYU Idaho, “Western States Marriage Index, 1809-2011,” Index database, *BYU Idaho Special Collections & Family History*, ID#208665, online database abish.byui.edu, (<http://abish.byui.edu/specialcollections/westernStates/westernStatesRecordDetail.cfm?recordID=208665>; accessed 18 July 2022). Christopher Madsen and Laura ~~Wolcott~~. 22 August 1876.

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Start with the **date, subject**, then **details** for each document, finding, abstract, synopsis, idea, hypothesis, you have on each ancestor broken up in paragraphs. Keep every entry in chronological order. **Bold the date.**

17 April 1893 H.G. Henley buys land from J.M. and Etta Varner.¹ This is transcribed and plotted. There are two lots, one is 100 acres, the other is for 30 acres.

¹Randolph County, North Carolina, Registrar of Deeds, images, *Courthouse Computer Systems* (<http://www.randrod.com/realestaterecords.html> : accessed 2 January 2021), entry for J.M. and Etta Varner to H.G. Henley, book 73:573 & 574.

Own It & Title It... but Share it?

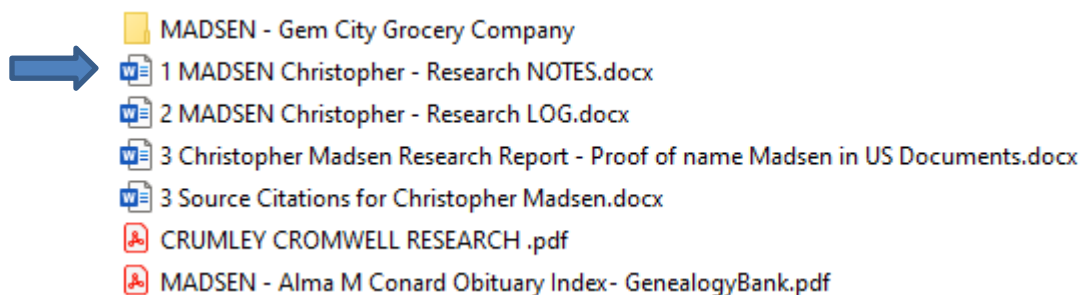
Headers & Footers

Use **headers** to **title** your Research Notes with your **Ancestors name** and **birth year**.

Use **footers** to put **your name** and contact information (optional). I like having my name on Research Notes, so people know who authored it. Own it! Own your research.

Save a template version so you only do that once!

Put a "1" in front of the Research Notes file name so it always is on top (when the file name column is sorted alphabetically). It is the most important document in your ancestors file folder.



Share?

I don't share my Research Notes online because I'm constantly updating them... plus they have my personal email on them. That's me... You Do You!

Type Once – Copy Twice

Feel free to copy and paste the information you put in your Research Notes into several ancestor's Research Notes. Same for documents, i.e., copy a marriage certificate into both the bride and groom's folders. Space is cheap. Make it easy for you and others to find the records.

If you had put a source citation (as a reference footnote) into your Research Notes, then copy it into another set of Research Notes, the source citation will go with it.

31 Aug 1895 H.G. Henley shows up as a bondsman in the probate record of Joshua M. Davis (deceased) along with W.A. Varner.²

Notice the source citations at the bottom? I just copied and pasted a few of my notes from my great grandfather's Research Notes here and the source citations came with it. Easy!

If you do this as a footnote (Reference Tab>Insert Footnote in Word) then the footnotes will move as you insert new text within your document. No need to move reference notes each time you insert new text.

² Randolph County, North Carolina, Administrators Bonds, 1870-1964, "Probate record for Joshua M. Davis, deceased, book 3, p. 193", 1895; digital image, *Ancestry* (<https://www.ancestry.com> : accessed 14 Feb 2021).

Download or Not to Download... That is the Question

I often get asked if they should download everything they find on Ancestry, FamilySearch or wherever. Here is my general rule of thumb.

Download!

When in doubt, download. We have zero control over what other people do. So if you are concerned at all about finding those records again, download it.

If it is a record you found after digging through the state archives, paid services, or hard to find locations, **download it, note it, source it, and file it** properly.

Don't Download

My general rule is that if it is **easily found for free** online at a common and stable URL, then no need to download it. An example of this would be a census record on FamilySearch.org. Census records are so easily found on so many services, I don't download them anymore. However, I DO transcribe and abstract them and add the abstract to my Research Notes.