UNTANGLING ROOTS:
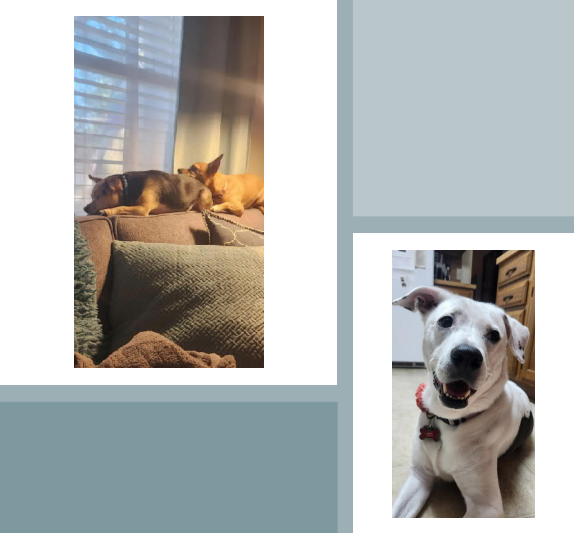
A Guide to Efficiently Organizing Your Digital Genealogy

Jennifer Lava – Professional Organizer & Family Historian

1

ABOUT ME

- Austin, TX, for ~49 years
- Adopted at 6 weeks old in Minneapolis, MN
- With husband for 24 years, we have 3 fur babies
- Grew up Jewish in an upper/middle-class neighborhood in Austin, TX
- Living with Chronic Pain
- She/her/hers

2

EXPERIENCE, CERTIFICATIONS, & MEMBERSHIPS

- B.A. in History from St. Edward's University-Austin
- Professional Organizer for 18+ years
- Certified Virtual Organizing Professional
- Certified Evernote Expert
- National Association of Productivity & Organizing Professionals Board Member
- Institute for Challenging Disorganization
- National Genealogical Society
- Texas State Genealogical Society
- Austin Genealogical Society

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

3

PLAN FOR TODAY

Why get organized?

SPACE-Organizing Your Digital Documents

Organizing the Research Process

Questions?

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

4

WHY GET ORGANIZED?

- More time for research
- More efficiency when researching
- Easier to retrieve saved information
- Less of a chance to lose information
- Easier to share your work with others
- Less stress

5

S.P.A.C.E.
BY JULIE MORGENSTERN

Sort
Purge
Assign a Home
Containerize
Equalize

6

SORT

- Identify where you have your digital records
  - Computer hard drive
    - Documents
    - My Documents/All My Files
    - Downloads
    - Desktop
    - This PC or (C:) Drive
    - Cloud Storage Folders
    - Default folders for software programs
  - External hard drive
  - Cloud services
  - USB drive
  - CD
  - Floppy Disk
  - Note Taking Apps
  - Email

7

PURGE

We have a lot of digital space. But decluttering can bring us peace of mind.

Ask yourself these questions:
- How much space do you have?
- Can you be ruthless in your cleaning & purging if you need to?
  - Start with duplicates that are outside of your 3-2-1

8

ASSIGN A HOME

- Be consistent!
- Keep it as simple as possible; you can always make it more complicated later if necessary
  - Sometimes, getting it in a folder is all that matters
- It's YOUR system; it's ok for it not to be "perfect." Do what makes sense to you.
- Make it easy for anyone else to understand
- Digital files & email organization needs to match the organization of physical files
  - Can include color coding
- Start Small; try it out to see how it's going to work
- Start now & going forward; then schedule a time to update the rest

9

- Desktop folder should be a temporary workspace if you use it at all
- Make sure your downloads are going to the right folders
  - Rename your downloads right away
- Cross referencing
  - Add Keywords/Tags to your files
    - You can add tags of the other family members' names
    - Tags are good for docs with multiple people, like Census
  - Shortcuts work so files aren't duplicated

ASSIGN A HOME

10

FILE SYSTEMS

There are several options to file by

- Surname
- Location
- Record type
- Couples or Family Groups
- Event
- Family Line

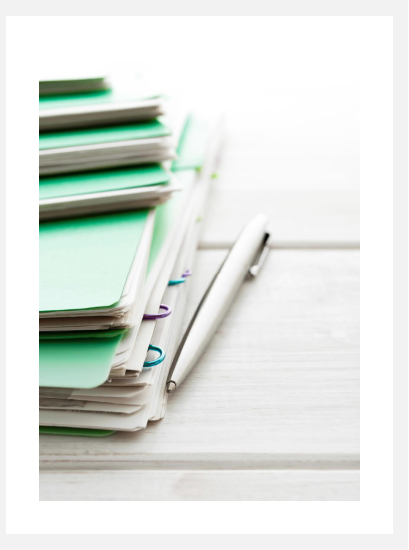©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

11

FILE SYSTEMS

Surname & Record Type Method
  - Sort your files by surname
  - Then, create folders for each record type for which you have a document
  - Grows easily

Geographic Area
  - Sort your files by surname & geographic locality
  - Then, subdivide them by record type
  - Gets harder if the family stays in one area

Record Types
  - Birth
  - Marriage/Divorce
  - Census

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

12

- Numbering Systems
  - Need a key so others can find records
  - They are limiting
  - Complicated

Other folder possibilities
  - Educational
  - Reference
  - Supplies & Tools
    - Charts
    - Forms

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

FILE SYSTEMS

13

OTHER FOLDER POSSIBILITIES

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVGp™

- Collateral Family
- Unusual resources
- Article
- Research Visits/Travel
- Correspondence
- Locations
- Histories
- GEDCOMS
- Reports
- Photographs
- Research logs
- "Mystery" & "To-do"

14

- Avoid special characters;
  - use underscores & dashes instead of periods & spaces
- Dates should be in the standard format
  - YYYY-MM-DD
- Use short, meaningful file names;
  - use standard two-letter abbreviations for states & months
- Use unique file names
  - use a name that will stand on its own
- Format dates, names, & locations consistently
  - Dates 1st will be sorted chronologically
  - Type of source 1st will sort alphabetically
  - Name 1st will sort alphabetically
  - Putting 001, 01, or 1 sorts chronologically
    - Good for marking birth order

CONTAINERIZE

FILE NAMES

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

15

FILE NAMING

File names should include the type of record, location, year or date of the record, surname/first name (Who, What, Where, When)

Examples:

Surname First:

    Surname-Firstname_yyyy-mm-dd_State-Place_Item.ext

    Smith-Robert_1890-MR-11_ NE-Lincoln_Birth Certificate.pdf

Place First:

    State-County-Place_Item_Surname-Firstname_yyyy-mm-dd.ext

    NE-Lancaster-Lincoln_Birth Certificate_Smith-Robert_1890-MR-11.pdf
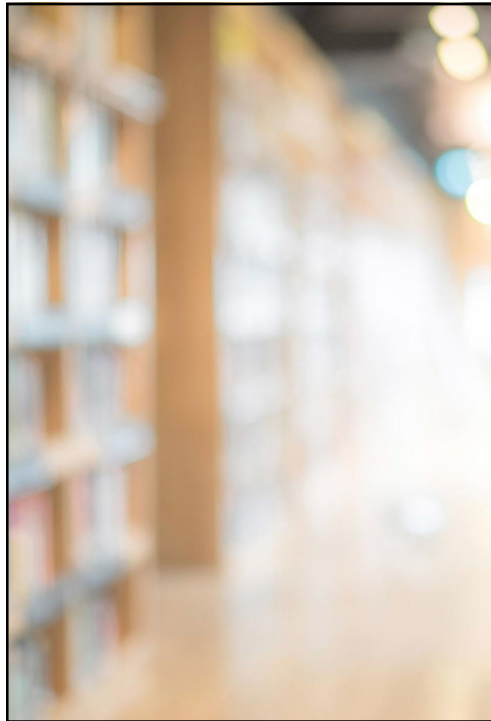
Date First:

    yyyy-mm-dd__Surname-Firstname_State-Place_Item.ext

    1890-MR-11_Smith-Robert_NE-Lincoln_Birth Certificate.pdf

Do what works for you as long as you are consistent & clear

16

HELPFUL RESOURCES

Best Practices for File Naming from Records Express Blog by the National Archives https://bit.ly/3ICdDkA

Library of Congress-Digital Preservation-Personal Archiving
https://digitalpreservation.gov/personalarchiving/

17

EQUALIZE

Objects & information will always come in. If we have a plan for managing them, we avoid getting overwhelmed & feeling like we need to start over.

Do you plan to pass your genealogy research on to the next generation?

Who will inherit it?

Do you have a backup plan?

18

SHARING YOUR GENEALOGY WORK

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVGp™

- Tree websites allow for sharing
- Permanent www.Permanent.org
  - No recurring fees, a one-time charge of $10 per-gigabyte
  - Create a personal archive
  - Public Archives to share on the internet
  - Legacy planning directives
- MyFamilyArchive (formerly Collectionaire) www.myfamilyarchive.com
  - Free and Paid levels, rate is locked in
  - Start with your tree
  - Your cloud files link to MyFamilyArchives
  - Easy to share
- Publish or self-publish your family history & send it to the Library of Congress

19

BACKUP YOUR DATA

3-2-1
- Keep at least 3 copies of your data
  - The original and two copies
- Use 2 different media for backup
  - Computer (internal hard drive)
    - Windows: built-in
    - Mac: Time Machine
  - External hard drive
  - Cloud service
    - Carbonite

- Backblaze
- IDrive
- Google Drive
- OneDrive
- iCloud
- At least 1 backup must be off-site
  - Cloud service
  - External drive in a safety deposit box, fire-proof safe, friend's house

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

20

RESEARCH PROCESS

- Set up the right workspace for you
- Be patient; it takes time to create a new habit
- Evaluate your research goals regularly
- Schedule regular breaks
- Track your work on a research log
- Organize with tech tools
- Use a calendar
- Use bookmarks & shortcuts
- Remove distractions

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

21

CREATE LOGS, CHECKLISTS, TIMELINES, & TO-DO LISTS

Research logs keep track of what you are doing.

The genealogical software you have selected likely has a built-in log feature.

Note-taking applications like Evernote, OneNote, and Apple Notes…

Microsoft or Google spreadsheets

Checklists help you track your searches

Timelines help you track your ancestors' lives & historical context.

   Easy to find gaps or mistakes in your research

To-do lists help you track your next steps.

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

22

SETTING UP A WORKSPACE

- Can you have a genealogy-only room?
- Or does it have to be multi-purpose?
- Make it look, smell, sound, & feel good
- Keep utility in mind when planning
  - daily, weekly, monthly, & annually
- Space to lay things out
- Wall space or White Board for planning or timelines

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™
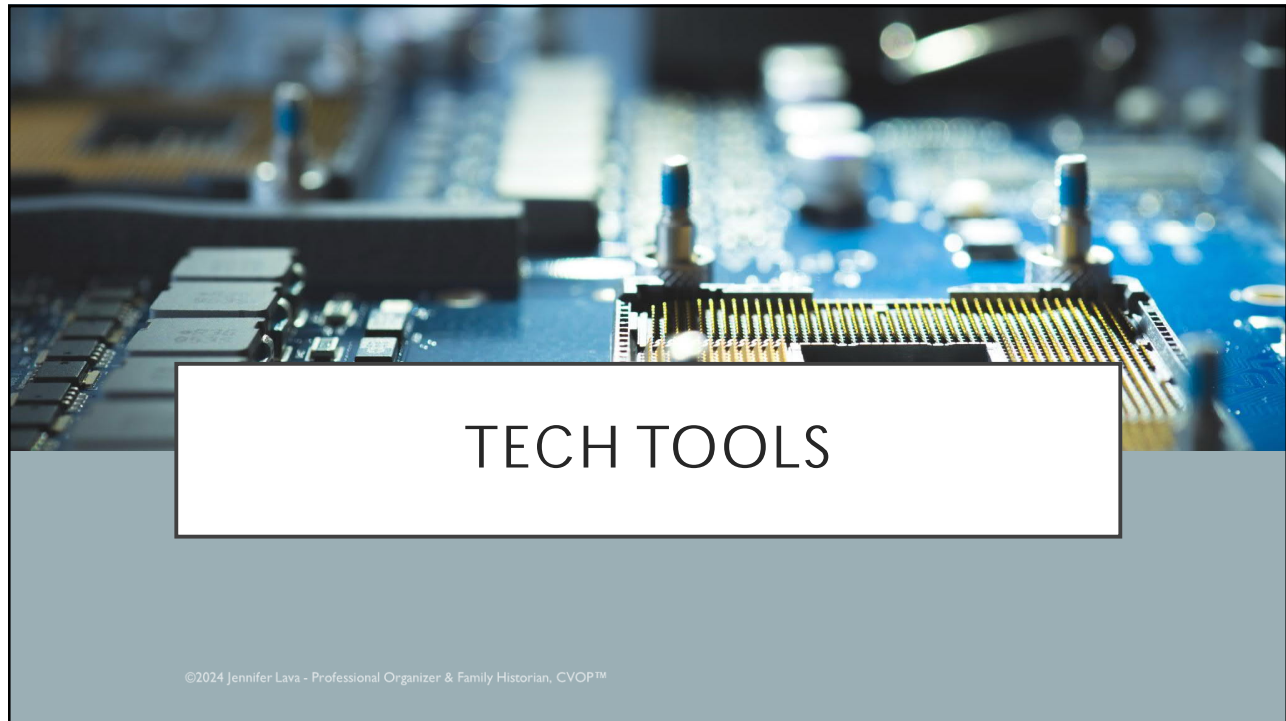
23

DESK SET UP

Dual monitors make research easier

An L-shaped desk with storage gives you room to work & a place to keep your active files

Good light

Ergonomic setup for chairs & monitors

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

24

TECH TOOLS

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

25

PROJECT MANAGEMENT

Trello www.Trello.com

Free, Web-based

Uses: Research planning, project planning & management, & collaboration

Asana www.Asana.com

Free (for up to 15 team users), Web-based

Uses: Research planning, project planning & management, & collaboration

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

26

RESEARCH TASKS

- Evidentia evidentiasoftware.com
  - Free trial, Windows, Mac, or Linux
  - Uses: Record & organize sources, & create citations
- Goldie May www.goldiemay.com
  - Free & paid versions, Chrome browser extension
  - Uses: Automatic research log, research task list, citations, bookmark windows & tabs
- Zotero www.Zotero.org
  - Free, Mac, Windows, Linux, & iOS
 - Uses: Citations, collect & organize online sources, annotate, & collaborate

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

27

NOTE-TAKING APPS

- Evernote www.evernote.com
  - Limited free version, web, Windows, Mac, Android, & iOS
  - Uses: Research plans & notes, web clippings, screenshots, filing, tasks, projects, and more
- Notion www.notion.so
  - Free & paid, web-based, Windows, Mac, Android, & iOS
  - Uses: Research plans & notes, web clippings, screenshots, filing
- OneNote
  - Part of Microsoft 365 subscription, web, Windows, Mac, Andriod, & iOS
  - Uses: Research plans & notes, web clippings, screenshots, filing

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™
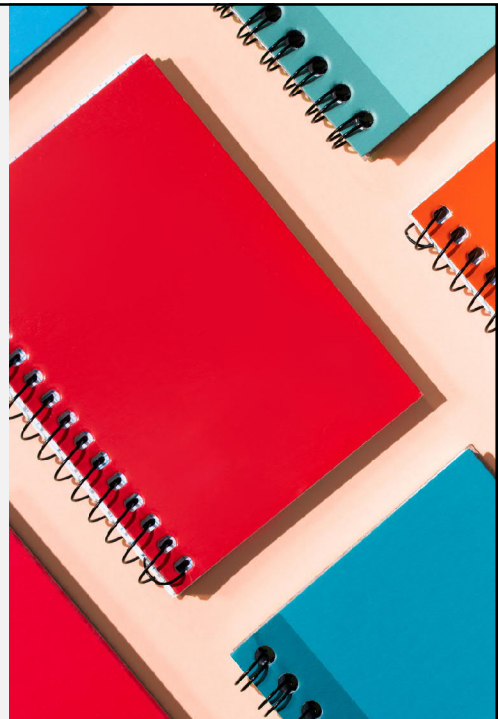
28

OFFICE TOOLS

- Google Drive-Docs, Sheets, Keep, & more
  - Free, web-based
- iWork from Apple-Pages, Numbers, and Keynote
  - Mac, iOS, iCloud
- Microsoft 365: Word, Excel, OneNote, & more
  - Yearly Subscription, Windows, Mac, Android, iOS, & web-based
- Uses: Research plans, notes, reports, & workbooks, correlating evidence, & timelines

29

QUESTIONS?

30

"Done! Everyone in the family tree has been found & everything is perfectly organized including the photos," said no genealogist... EVER.
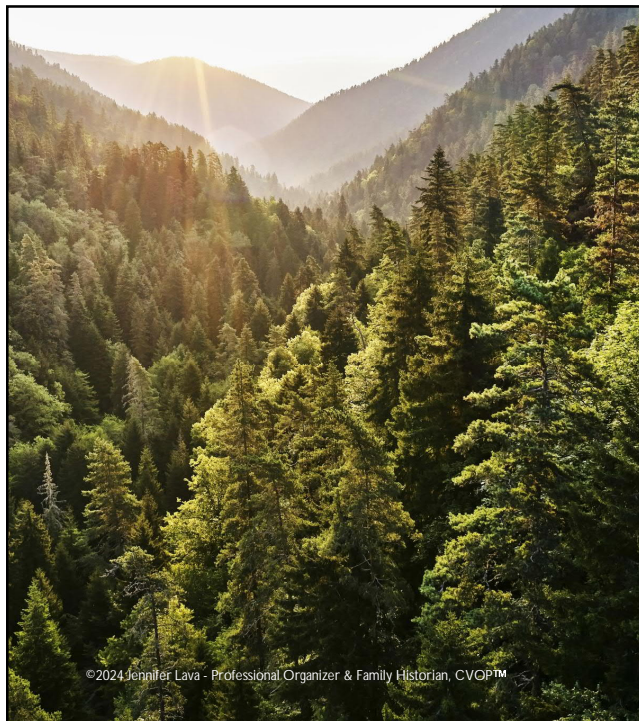
someecards
user card

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

THANK YOU!

31

©2024 Jennifer Lava - Professional Organizer & Family Historian, CVOP™

IF YOU WANT TO LEARN MORE FROM ME

Join me on Zoom through the Mt. Hood Community College Community Education Program

Upcoming classes are:

Roots Revealed: The Beginner's Guide to Genealogy April 16-30

Unlock the Mysteries of Ancestry.com: A Beginner's Guide   May 14-28

Navigating Genealogy Chaos: Techniques for Staying Organized Amidst Your Research June 4 & 11

These are on Tuesday evenings at 7 pm to 9 pm Mountain time

https://learn.mhcc.edu/modules/

32

CONTACT ME

Jennifer Lava – Professional Organizer & Family Historian
www.JenniferLava.com
Jennifer@JenniferLava.com
512-925-2962

www.facebook.com/JenniferLavaProfessionalOrganizer

www.instagram.com/jenniferlava/

www.linkedin.com/in/jenniferlava/

33