

# Organizing Your Family History Research

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Researching your family history is a *labor of love*. But do you sometimes feel like you are drowning under a pile of paper, are overwhelmed with the items you inherited, have no idea what to do with all of your findings, or worse, can't find those records on your hard drive? There are as many ways to organize your data as there are family historians. The only "right" way to organize your genealogy is to do it in a way that that works for you and that you will consistently follow. Regardless of the format you use, make sure it meets your needs and is something you can stick with.

## When researching, it is ideal to

- Start with a specific question: "Who were my paternal great grandparents?"
- Create a plan of action: "What records am I going to look for and where?"
- Take copious notes: "What did I find and what did I *not* find?"
- Write a citation: "What is it and where did I find it?"
- Save the document or image to a filing system with a label and a description

However, most of us have been busy gathering shaky leaves from Ancestry and accumulating piles of files, boxes of unsorted memorabilia, and thousands of unlabeled photos. It's never too late to get your family history organized. The longer you put it off, the more difficult it is going to be.

## Why create an organizational filing system?

- To save yourself time, both in looking for something and where to file something new
- To see where you need to do more research (i.e., fill in the gaps)
- To easily share your information
- To preserve your research for others

It's easy to collect "things" (documents, ephemera, artifacts, photos, etc.) but without a clear organizational **strategy** your family history project will become paralyzing. Organizational strategies apply to both paper and digital files. In addition, there is a difference between file organization and archival storage.

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### Three common organizational methods for family history

- **Document-Based Organization**  
Sort files by document type (e.g., birth certificate, census, photograph)
- **Numerical-Based Organization**  
Each individual, couple, document is assigned a number
- **Surname- or Family Group-Based Organization**  
Files are arranged by surname, then by document type

### Getting started with organization (surname-based)

- Start with the files and items you already have.
- Create one folder for general materials about family history. This might include bibliographies, articles, syllabi from classes, templates, blank charts, subscriptions, and any resources for your general research. This folder should *not* be family-specific.
- Create a separate folder for families.
- Sort your items by surname. Begin with one surname at a time. Children should be filed with the surname until they leave the family (e.g. marriage).
- Take digital photos of your artifacts, scan paper and photos. These will all become part of your filing system.
- Place any original items into archival storage ([see Densho webinar "Preserving Your Family Archives"](#)).
- Nest your folders from general to specific.  
My families>Surnames>Subject Folders

### Subject folders

Each surname folder should include sub-folders for your primary research categories.

Create a template of all the subject categories you typically use, such as:

- A-Files
- Birth, Marriage, Death
- Census
- Charts, Reports, Timelines
- Correspondence
- Court, Wills, Probate
- Directories
- Education
- Family Supplied Documents
- Immigration
- Incarceration
- Kakocho
- Koseki
- Land Records
- Maps and Locations
- Military
- Misc. Docs and Files
- Naturalization
- Newspapers
- Obituaries
- Occupations
- Passports
- Photos
- Religion
- Social Security
- USCIS



## Labeling Your Files

Naming conventions are merely labels to help you easily and quickly find items. Every document, image, or item needs a label/name. Each label should include the surname, first and middle names, date the document was created, and the type of document. The order and formatting are up to you, as long as it is a system you can maintain. You can create labels which are as detailed as you want. Keep a list of your labels in a cheat sheet so that every entry is consistent. Decide if you want your labels to start with a year a surname, or something else. Do you want your surnames to be capitalized or not?

Sample labels might look like:

- OKAZAKI\_Ichimaruru, Manifest, page 1-2, 1912
- 1921, Okazaki Ichimaruru and Maihara Hamako, Ota Japan, Wedding Photo
- 1930 Federal Census, Okazaki Ichimaruru, Santa Maria, California

## Online trees and genealogy software programs

Download every document you find online, label it, and place it in a digital folder on your hard drive (and if you want, in a paper file). You might have a tree on Ancestry, FamilySearch, and/or in a software program (e.g. Family Tree Maker or RootsMagic) but it is wise to also keep the data in another location.

## Protecting Your Research

Back up your computer often, save your records in multiple places including an external hard drive and a cloud based service.

## Next steps

Every document, artifact, or photo should also have a description and a citation. This will help you to find the original, it will help you to better evaluate your research, and it will help to prevent you from repeating research. When you write a description for every item, your family narrative practically writes itself. Citations should include enough detail for you, or anyone else, to go back to the source. You might include a URL, but be aware that those can change. Chicago Manual of Style and Evidence Explained are two resources to help you to craft citations.



## Resources

Barker, Melissa (The Archive Lady)

<https://agenealogistinthearchives.blogspot.com/2022/01/organizing-your-genealogy-research-tips.html>

Cyndi's List: Organizing Your Research

<https://www.cyndislist.com/organizing/>

FamilySearch: Organizing Your Files

[https://www.familysearch.org/wiki/en/Organizing\\_Your\\_Files](https://www.familysearch.org/wiki/en/Organizing_Your_Files)

Finding Your Nikkei Roots: Organizing Your Genealogy Files. Linda Harms Okazaki. 7 May 2020.

*Nichi Bei Weekly*. <https://www.nichibei.org/2020/05/finding-your-nikkei-roots-organizing-your-genealogy-files/>

Genealogy Software Programs (RootsMagic, Family Tree Maker, Legacy Family Tree)

[https://en.wikipedia.org/wiki/Comparison\\_of\\_genealogy\\_software](https://en.wikipedia.org/wiki/Comparison_of_genealogy_software)

The Genealogy Squad (Facebook): #FilingFriday

<https://www.facebook.com/groups/genealogysquad>

Loe, Nancy E. *Sassy Jane's Guide to Cataloging Family Photographs & Records*.

SassyJaneGenealogy.com ebooks: 2017.

Loe, Nancy E. *Sassy Jane's Guide to Organizing Genealogy Research Using Archival Principles*.

SassyJaneGenealogy.com ebooks: 2017.

MacEntee, Thomas, *Genealogy Bargain\$*, Genealogy Project: Get Organized!

<https://genealogybargains.com/genealogy-project-get-organized/>

The Organized Genealogist (Facebook)

<https://www.facebook.com/groups/organizedgenealogist>

Smith, Drew. *Organize Your Genealogy: Strategies and Solutions for Every Researcher*. Ohio:

Family Tree Books, 2016.

Yip, Linda, *Past Presence*, Genealogy: Photo Scanning

<https://past-presence.com/2020/08/01/how-to-tackle-your-first-big-photo-scanning-project-my-collection-of-5-blogs-about-scanning/>

