Taming Your Inner Packrat:
Genealogy Clutter Buster Mini Boot Camp

Presented by Lisa A. Alzo, M.F.A.
lisa@lisaalzo.com / http://www.lisaalzo.com

Are you drowning in a sea of papers, documents, old photographs and other research materials? Do you often feel like a family history hoarder? Perhaps it is finally time to purge your inner packrat and bust through the clutter.

In this workshop you will learn:

- How to organize family history documents, photographs, for quick retrieval
- The pros and cons of going paperless
- Stress-free filing strategies and creating checklists to stay on track
- Effective ways for distributing and sharing genealogical information
- Tools, apps and resources for taming your paper and electronic monsters

Recording Data

- Use a Genealogy software program
- Research planner
- Research log
- Ancestor Data Sheet or Biographical Forms
- File Storage (computer and cloud) – always back up your data
  (see Toolkit handout)

Sharing Information

- Online family tree
- Printed Book or eBook
- Family Website
- Blog
- Facebook, Twitter, Google Plus (G+), Pinterest, YouTube
- Make a provision in your Will. Who will inherit your genealogy research?

Paper Storage

- Use archival quality supplies
- Be mindful of temperature changes and light sensitivity
- Keep originals in a safe place (fireproof safe, safety deposit box, etc.)
- Scan documents and photographs to have an electronic copy/backup

Filing Systems
There are a number of different ways to organize your research.

Basic: Using Binders
- Use a three-ring binder system
- One binder for each surname
- Label subject dividers by record type
- Put copies of corresponding documents behind the divider
- Once it gets full, subdivide into smaller binders or switch methods

Basic: Using File Folders
- Get a filing cabinet or plastic storage crate or portable file cart and file folders
- Store documents according to surname and geographic locality (e.g. "FENSCAK, JOHN: Allegheny County, PA, 1911-1966"
- Subdivide them by record group and organize by record group (e.g. "Allegheny County, PA: Vital Records" "Wills," "Internet Sources,")
- **Pros:** Keeps sources neatly organized; **Cons:** Bulging files

Filing by Surname
- Make separate file folders for the surname and type of record (e.g. "FENSCAK: Census," "FENSCAK, Passenger Lists," etc.)
- Give each record a page number (in the same place on each document)
- For easy retrieval, create a Table of Contents (Date, Name, Type of Search, Location, Page Number). Create your own in Microsoft Word (use the Table feature and label it with the surname in the upper left-hand corner and type of record in upper right-hand corner); or use a template – download one for free at: www.familytreemagazine.com/freeforms>
- When you find new sources or add new photocopies to the files/update TOC
- If you have a document that pertains to two surnames (e.g. marriage license), make a copy for each file and enter both on the TOC for each file

Filing by Couple
- Create a Family Group Sheet for each married couple
- Every couple gets a folder
- Label with names of the couple (include wife's maiden name) (e.g. "MICHAEL FENSCAK and HELEN LESKO")
- You can write the names of the couple's children on the outside of the folder
- File all documents you find on the couple in the folder(s)
- When a child marries, start a new folder for that couple (e.g. "JOHN FENSCAK and Anna MALI")
- If a child does not marry then keep his/her documents in the parents' file
- If the child remarries, assign a new folder for the new marriage and any new children from that relationship
- File folders alphabetically by the husband's name

- Use colored paper to separate records and create a TOC for each folder
- Make duplicate copies of documents that apply to more than one couple (for example a census record where the father and mother live with son and wife)

Organizing Miscellaneous Documents

- You may have research guides, maps, state archives or repository information, or historical data or articles that do not easily fit into files
- Use a separate binder to file resources
- For heirlooms or one-of-a-kind items use archival quality (acid/lignin-free) storage

Organizing Photographs

- Organization is the *key* to keeping photographs safe, dry and preserved
- Storage: Acid-free albums or sheet protectors
- Put labels on the outside of the sheet protectors to identify those photographs, and mark the names and date lightly in blue pencil on the back
- Scan all family photographs into digital files and keep backups
  - JPEG (compressed; best for Web pages)
  - TIFF (best for printing)
  - PDF (embeds fonts and images in one layer)
  - GIF (often used on the Web)
- Catalog the images into a database to keep track of them
- Storage in acid-free materials at a temperature of no more than 77 degrees & 40 percent humidity
- Avoid heat, floods, scratches, etc.

Electronic Files

- Create surname directories on your computer hard drive
- Create sub-directories for different types of records
- Using naming conventions that make it easy for you to search
- Add tags and metadata
- Always back up your digital files (consider "cloud storage" options)
- Convert old films, slides, videotapes to more accessible format
- Consider CD and DVD longevity: (30, 50, 100 years? It depends…)

Going Paperless

- Upgrade your equipment ever few years (avoid obsolescence)
- Transfer files to new media as soon as available
- Keep printed copies of very important/irreplaceable documents
- Don't become a "digital hoarder" "Just say, "No!"
- Establish a routine to back up your data!

Additional Tips

- Try not to work on multiple lines at the same time (find a focus)
- Organize/file as you go

- If you hate filing, keep a "To File" box in your office or by your compute and schedule time once a week to file what is in that box.
- When working on one line, keep research on other lines neatly filed away
- Start small; don't be too ambitious
- Set **SMART** goals
  - Specific
  - Measurable
  - Attainable
  - (Actionable)
  - Relevant
  - (Realistic)
  - Time-bound
- Use a Research Planner and Correspondence Log to stay organized
- Avoid "out of sight, out of mind."
- Schedule clean-out time once a month.
- Back up what you need.
- Clean up the file folders.
- Purge duplicates outdated information.
- Consult Groups/Pages on Organizing and Genealogy on Facebook, Google+ (see Toolkit freebie handout)

Important Considerations: Trash or Treasure?

- Organizational mindset (starts inside not outside)
- Every person is different; do what works for **you**!
- Living space and work environment
- Memories
- Emotions and sentimental attachment
- Monetary value?
- What benefit does the item or information provide to me? The family?
- Ask important questions:
  - Is this item, document, photograph, information irreplaceable?
  - Is it one of a kind?
  - Will a digital version be available or suffice?
  - Who will inherit the information or items when I die?
  - Can I be "ruthless" in my cleaning and purging if I need to?

> **One person's mess is merely another person's filing system.**
>
> **~Margo Kaufman**

Summary

- Set goals and deadlines
- Break tasks down into smaller segments
- Utilize technology: Don't be afraid to try new tools and apps

- Staying organized takes time and discipline
- Find a system that works for **YOU**!

Selected Bibliography

Articles (Print)

- "Battle of the Bulge" by Sharon DeBartolo Carmack, *Family Tree Magazine*, March 2008

- "Logging On" by Lisa A. Alzo, *Family Tree Magazine*, Jan./Feb. 2013

- "Road Map to Your Roots" by Lisa A. Alzo, *Family Tree Magazine*, Jan. 2011 (*Family Tree Magazine* Plus subscribers can access articles online at http://familytreemagazine.com)

- "Say 'Hello' to Trello!" by Lisa A. Alzo, *Internet Genealogy*, April/May 2013

- "Seven Low-Cost or Free Mobile Scanning Applications" by Tony Bandy, *Internet Genealogy*, Dec/Jan 2015

Articles (Online)

- "CD and DVD Longevity: How Long Will They Last?" by Andy Marken http://www.audioholics.com/audio-technologies/cd-and-dvd-longevity-how-long-will-they-last

- "Cleaning Mother's House," by Michael John Neill http://rootdig.blogspot.com/2014/11/cleaning-mothers-house.html

- "Creating Order From Chaos: 9 Great Ideas for Managing Your Computer Files" by Aaron Couch http://www.makeuseof.com/tag/creating-order-chaos-9-great-ideas-managing-computer-files

- "40 Bags in 40 Days Decluttering Challenge" http://www.whitehouseblackshutters.com/40-bags-in-40-days-2014;

- "40 Bags in 40 Days" Printable Checklist http://www.whitehouseblackshutters.com/wpcontent/uploads/2016/01/40bagsprintable.pdf

- "How to Set a SMART Genealogy Goal" by Amy Johnson Crow http://www.amyjohnsoncrow.com/2015/12/29/how-to-set-a-smart-genealogy-goal

- "Just say no to digital hoarding" by Dominic Basulto, *The Washington Post*, December 16, 2014 https://www.washingtonpost.com/news/innovations/wp/2014/12/16/just-say-no-to-digital-hoarding

- "Let It Go: 14 Things to Trash Without Thinking Twice," (MSN) http://www.msn.com/en-us/lifestyle/home-and-garden/let-it-go-14-things-to-trash-without-thinking-twice/ss-BBo5M8T?ocid=sf

- "OneDrive, Dropbox, Google Drive and Box: Which cloud storage service is right for you?" by Sarah Mitroff (CNET)
  http://www.cnet.com/how-to/onedrive-dropbox-google-drive-and-box-which-cloud-storage-service-is-right-for-you

- 6 Modern Note-Taking Apps to Keep Your Thoughts Organized by Brad Jones
  http://www.makeuseof.com/tag/6-modern-note-taking-apps-keep-thoughts-organized

- SMART criteria (Wikipedia)
  http://en.wikipedia.org/wiki/SMART_criteria

- "200 Things to Throw Away"
  http://embracinghomemaking.net/2015/04/200-things-to-throw-away

Books

- *After You're Gone: Future Proofing Your Genealogy Research* (Kindle Edition) by Thomas MacEntee

- *Conquering the Paper Monster* by Elyse Doerflinger (eBook)

- *Digitization Options for Family Photos: Including Slides, Film Negatives, and Home Movies* (Kindle Edition) by Thomas MacEntee

- *Evernote for Genealogists QuickGuide* by Lisa Louise Cooke.

- *Evidence Explained: Citing History Sources from Artifacts to Cyberspace, Third Edition* by Elizabeth Shown Mills

- *How to Archive Family Keepsakes: Learn How to Preserve Family Photos, Memorabilia and Genealogy Records,* (Paperback) by Denise May Levenick (F+W Media)

- *How to Archive Family Keepsakes: Learn How to Preserve Family Photos, Memorabilia and Genealogy Records* (Kindle Edition) by Denise May Levenick

- *How to Archive Family Photos: A Step-by-Step Guide to Organize and Share Your Photos Digitally* by Denise May Levenick (F+W Media)

- *How to Archive Family Photos: A Step-by-Step Guide to Organize and Share Your Photos Digitally* (Kindle Edition) by Denise May Levenick

- *How to Use Evernote for Genealogy: A Step-by-Step Guide to Organize Your Research and Boost Your Genealogy Productivity* (Kindle Edition) by Kerry Scott

- *How to Use Evernote for Genealogy: A Step-by-Step Guide to Organize Your Research and Boost Your Genealogy Productivity* (Paperback) by Kerry Scott

- *Organize Your Genealogy in Evernote in 10 Easy Steps* (Kindle Edition) by Lorine McGinnis Schulze

- *Saving Stuff: How to Care for and Preserve Your Collectibles, Heirlooms, and Other Prized Possessions* by Don Williams (Fireside)

- [The Evidentia Companion](#) by Edward A. Thompson (published in 2016 by Evidentia Software)
- [*The Genealogy Do-Over Workbook*](#) (Kindle Edition) by Thomas MacEntee
- [*The Genealogy Do-Over Workbook*](#) (Paperback) by Thomas MacEntee