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G U I D E

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Organizing Your Paper Files Using File Folders

Guide

Introduction

Successful genealogy research depends upon being able to find information again which you already have. To do so you need a simple system for organizing paper copies of family group records, pedigree charts, documents, notes, and research helps. The steps given below for setting up a filing system were developed and refined over several years. While this system is not the only way to organize family history information, it is inexpensive, simple to use, easy to set up, and has proven helpful to many people who have used it.

Don't think you have to do all the steps outlined below in one day. Pace yourself. Print off these instructions and check each step off as you do it. Discover for yourself the good feeling of knowing you have a system for keeping your genealogy records organized for yourself and your posterity.

For an additional explanation of this filing system, see Background.

What You Are Looking For

- Quick access to genealogical documents, notes, and research tools that you have already gathered.
- A place to put new documents and notes so you can easily find them again.
- A way to store and use paper files and documents in relation to a computer genealogy management program.
- A filing system that will preserve what you have collected to pass on to the next generation.

Steps

These 12 steps will help you set up a basic filing system using file folders.

Step 1. Gather supplies for your filing system.

This system works best if you gather the following basic supplies:

2 file boxes with lids.	The boxes need to be strong, preferably plastic, with horizontal inner ridges or grooves for letter-size hanging files. See Example.
Colored hanging file folders.	You will need letter-size hanging file folders in blue, green, red, and yellow. They come in 1/3 and 1/5 cut slots, which has to do with the size of the plastic tab. The 1/5 cut works best with this system. Hanging file folders keep the manila folders from slipping down in the file box. See Example.

Standard green hanging file folders.	You should get standard green letter-size hanging file folders with the 1/5 cut slot. See Example.
Manila folders.	These need to have 1/3 cut tabs assorted and reinforced tops to last through heavy use. See Example.
Pens.	You should use a pen with an ultra fine point, felt tip, and black permanent ink.
Highlighters.	Buy highlighters in light blue, light green, yellow, and pink (don't use red because it is too dark). Colored pencils also work.
Labels for file folders.	These labels should have blue, green, red and yellow strips along the top and permanent adhesive on the back. See Example.
Dots.	Get blue, green, red, and yellow dots with permanent adhesive on the back.
Lined paper.	Acid free paper will extend the life of your notes. Good quality photocopy paper is almost acid free.
Additional boxes.	Use these to expand your files, as needed.
Carrying case.	Buy a letter-size carrying case with a handle to take with you when researching.
Large wall-size pedigree chart.	A large pedigree chart helps you to see clearly your family lines (optional). These are available from commercial genealogy suppliers. The circle chart works well with color coding.

For an explanation of why simple color coding makes it easier to keep your families sorted, see Tip 1.

For an explanation of how the file box is set up and what it looks like, see Tip 2.

Step 2. File your family pedigree charts.

Print or copy a complete set of all your pedigree charts, for all lines. Start with yourself. If your computer program allows you to also print an index of your pedigree names, include the index in the file folder with the pedigree charts.

Label the tab of a standard green hanging file folder **Pedigree Charts**. Put the copy or printout of all your pedigree charts in the folder, together with the index if you have it. Hang the folder in the front of the file box.

This complete set of your pedigree charts will act as a map for your family files.

Step 3. Print a copy of the Circled 5-Generation Pedigree Chart.

Print a color copy of the Circled 5-Generation Pedigree Chart. If you do not have a color printer, print a black and white copy. Then note the colors of the various circles, and write or mark the colors of the circles on the chart.

The Circled 5-Generation Pedigree Chart is a crucial key to understanding how the color coding of family files works. On the chart you see that you are made up of the 4 colors of your 4 grandparents. Your father is made up of the 2 colors of his parents, and your mother is made up of the 2 colors of her parents.

Step 4. Separate the lines of your 4 grandparents by color.

Print a copy of your own 5-generation pedigree chart, starting with yourself as number 1. You are the first generation; your 16 great great grandparents are the 5th generation.

Using the sample Circled 5-Generation Pedigree Chart as a guide, draw colored circles around each family on your 5-generation pedigree chart. Color code the lines as follows:

- BLUE: Circle all families who are ancestors of **your father's father** in blue.
- GREEN: Circle all families who are ancestors of **your father's mother** in green.
- RED: Circle all families who are ancestors of **your mother's father** in red.
- YELLOW: Circle all families who are ancestors of **your mother's mother** in yellow.

Step 5. Put 16 hanging files into your box.

Put 16 hanging file folders in the file box, 4 of each color. Group them by color. To see an example of how the file box looks, [click here](#).

Step 6. Label the colored hanging file folders with your family surnames.

Label each hanging file folder with one of the 8 surnames of your great great grandfathers and the 8 maiden names of your great great grandmothers. There will be 4 surnames in each color. Follow the colored circles on your 5-generation pedigree chart to know which surname to put with which color.

- Write one surname on each hanging file tab (plastic tabs come with the colored hanging file folders). Use a permanent black ink ultra fine point felt tip pen for writing the names.
- Hang the files in alphabetical order by color. Put the blues alphabetically in one group, the greens in another group, the reds in their group, and the yellows in their group.

If you don't know the last names of some of your 16 great great grandparents, label as many of the folders as you can, and leave the other folders in the file for future use.

Tip: Your great great grandparents are the people who are listed with the numbers 16 to 31 on your 5-generation pedigree chart. Eight of the surnames are the lines of your great great grandfathers, and the other 8 are the lines of your great great grandmothers.

Step 7. Put a highlighted copy of your 5-generation pedigree chart in each of the colored folders.

Print 16 more copies of your 5-generation pedigree chart with you as number 1 on the chart.

On one of the pedigree charts, highlight the names of all persons with the same surname using the color assigned to that surname. File the highlighted pedigree chart in its surname hanging file folder.

[Click here](#) to see an example of a highlighted pedigree chart.

Repeat the process of highlighting a surname line and filing the pedigree chart in its hanging folder for each of the 16 surnames of your great great grandparents.

Use these charts as guides or maps for each surname. Highlighting the surname on the pedigree chart makes it quick and easy to see how that surname fits into your complete family pedigree.

For instructions on dealing with a pedigree line that goes back one or more generations beyond the first 5 generations, see [Tip 3](#).

For instructions on what to do if you have two lines which merge and become the same line, see Tip 4.

Step 8. Set up a file for each family on your 5-generation pedigree chart.

Print a copy of the family group record of each of the families on your 5-generation pedigree chart. To find the parents of your great great grandmothers, see Tip 5.

- If you have information about all of these families, including the parents of your great great grandmothers, you will be setting up a total of 23 family folders.
- Once the system is set up, you can add additional family folders as you find more information.

Using your 5-generation pedigree chart as a guide, decide what color each of the families should be filed under. Write or mark the color on the top of the family group record.

Set up manila folders for each of the families by putting a colored label on the file folder tab. Match the label color to the color of each family group record. Be sure to use permanent adhesive labels.

Example:

Colored strip
JONES, Paul b. 1841 m2
SMITH, Jane b. 1845

On the label, write:

- The surnames of the husband and wife in capital letters, followed by their first names.
- A small "b" for birth and the year of their births.
- If one of them was married more than once, write "m2" or "m3" for the corresponding marriage.

The label only gives enough information to identify this family. Other information about them can be found on their family group record in the file folder.

Step 9. File the manila folders.

Place the manila family folders in hanging folders, matching the color of the label on the manila family folder to the color of the hanging file folder. See Example.

- Group the family folders by color and then by surname, for example, put all the red Smiths together and all the yellow Jones families together.
- Arrange the family folders in alphabetical order by the husband's first name.
- Put family folders into the surname hanging files they belong with.

When the surname changes every generation, as it does for some Scandinavian, Asian, American Indian, and Polynesian families, file the families by location or by birth date.

Step 10. Put these items in each family folder.

In a family folder, put:

1. The family group record of the family. If there was more than one marriage, make a separate folder with a family group record for each other marriage.

2. Documents you have already gathered that belong with this family.
3. Notes you have already taken that belong with this family.

Add the following items to a family folder, as you need them:

1. To Do List which is a list of questions about this family that you want to find answers for.
2. Research Log for keeping a record of your research on this family.
3. Timeline for a chronology of this family's life events.
4. Maps pertaining to where this family lived.
5. Research notes taken.
6. New documents found.
7. Family group records for the families of married children who are not the direct-line child.
(See Tip 6 for more information.)

Include all documents from the time of a couple's marriage. Documents which pertain to events prior to their marriage should be filed in the folders of their parents, such as birth certificates and baptism certificates.

Step 11. Set up other useful files.

1. Set up Holding Files to store items temporarily.

Set up Holding Files for storing additional information which pertains to a surname and needs to be analyzed and used. Include:

- Documents.
- E-mails.
- Letters.
- Notes.
- Photographs.
- Maps.

Place the Holding File right behind the surname hanging file with the pedigree charts and before the family files. Do this for any surname where you have many documents and see the need.

When you have a large number of documents for a surname, it helps to create 2 Holding Files. Set up a:

- Temporary Holding File.
- Permanent Holding File.

The temporary Holding File gives you a place to store items which pertain to that surname until you can sort, use, and file them in the files you want to store them in permanently.

The permanent Holding File is for records which have information about several generations of your family, such as the parish registers of a church where your ancestors lived for 200 years. Since the records of more than one family are in the document, you don't want to file the document in the family file of just one family. Either you could photocopy the document multiple times, or store it in a permanent Holding File for that family surname.

Be sure to go back and use the documents stored in Holding Files.

Tip: Photographs should be stored in archival quality holders for long-term preservation.

2. Set up Locality Files for places where you are researching.

Set up Locality Files for documents that contain information about more than one family in a given place. Locality Files store information for countries, states or provinces, counties, cities, parishes, or towns.

- Use standard green hanging files for Locality Files.
- Put these hanging files in the 2nd file box.

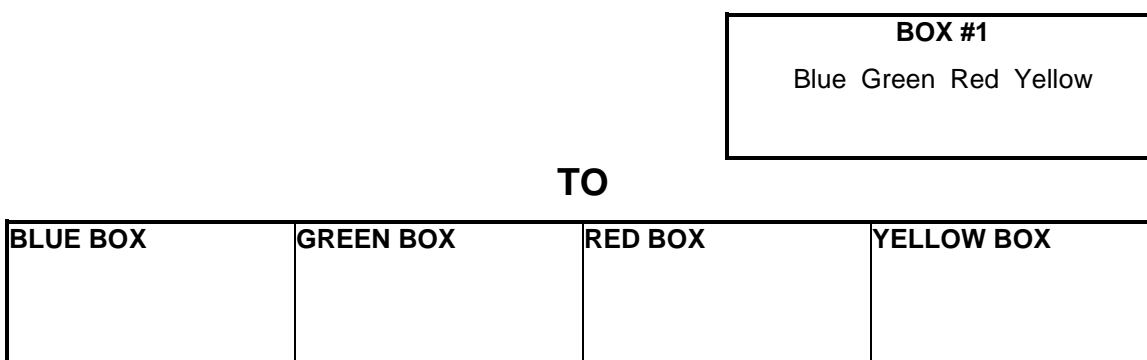
For more information on Locality Files, see Tip 7.

3. Set up Tools Files, as needed, for tools such as language aids, religion, or handwriting.
Group Tools Files together in the front of the Locality box.

Step 12. Expand to other boxes as needed.

When one of your color sections gets too big for your box, move all files of that color into another box.

As you find more information, you will eventually end up with a box for each color and sometimes several boxes for a color. See this Example. The colored arrows on the right edge of the Example show that other boxes will hold files for more families that belong within that color.



For instructions on how to keep this basic file folder system updated and useful, see Tip 8.

Background

This system shows you how to set up file folders for the families on your pedigree lines and also how to file information about cousins and other relations. Pedigree charts are divided into 4 colors, based on the lines of your 4 grandparents. Family file folders store documents and a printed copy of your family group record. Dividing your pedigree by color helps make it clear which line a family belongs to.

Holding Files

As you research, you will acquire many documents, e-mails, notes, and letters that need to be analyzed, used, and filed. But you can't always do that immediately after finding new information. Therefore, Holding Files provide a temporary place to store papers until you can analyze, use, and file them permanently.

Locality Files

In your research, you will often find documents that contain information about more than one family from the same place, or documents from one place which have several families with the same surname. You may not know yet how you are related to them. Often you may be related to several other families in the same area.

You can store records such as a census index of your family surnames, a map, a list of marriages from a town or county, an index to the wills in an area, or a local history in a file named for that locality. Then you can add information from these documents to your computer genealogy management program, with a source reference and notes taken from the documents filed in your Locality File. Locality Files are useful and flexible. You can add Locality Files as you need them.

Tips

Tip 1. Why do I want to color code my files?

When you fill out pedigree charts with all of your ancestors' names, the results can be rather overwhelming. How can you keep straight who all of these people are and who they were related to?

Just as it is much easier to eat a pie cut into 4 quarters, so it is easier to figure out who belongs to whom when you only have to deal with one quarter of the whole family pedigree at a time.

Click [here](#) to see a circle pedigree chart divided into 4 quarters by color.

The 4 quarters of the circle pedigree represent the ancestors of your grandparents. Every one of your ancestors is related to one of your 4 grandparents. So, you can color code your pedigree by the lineages of your 4 grandparents. You should mark and file all the ancestors of one grandparent with the same color:

- Grandfather's lineage on your father's side: all folders marked BLUE.
- Grandmother's lineage on your father's side: all folders marked GREEN.
- Grandfather's lineage on your mother's side: all folders marked RED.
- Grandmother's lineage on your mother's side: all folders marked YELLOW.

Color coding is fun, easy, and very helpful. The end result is that you will be able to quickly figure out who belongs to whom, and your frustration level will drop considerably.

Tip 2. What does the file box look like, and how is it set up?

To see a file box set up with colored hanging file folders and manila files of families, click [here](#).

Note that the hanging file folders are in 4 different colors. Each one of the colors represents one of the 4 lines of your grandparents. The following table represents this box.

Sample File Box

The top of the chart represents the front of the box. Each row represents hanging file folders with their contents.

FRONT OF THE BOX
Complete set of all your pedigree charts for all lines.
First Blue surname, in alphabetical order, with pedigree charts in a hanging folder.
First Blue surname Holding File in a hanging folder.
First Blue surname family folders in their own hanging folders.
Second Blue surname, in alphabetical order, with pedigree charts in a hanging folder.
Second Blue surname Holding File in a hanging folder.
Second Blue surname family folders in their own hanging folders.

All other blue files follow in this pattern.
First Green surname, in alphabetical order, with pedigree charts in a hanging folder.
First Green surname Holding File in a hanging folder.
First Green surname family folders in their own hanging folders.
Second Green surname, in alphabetical order, with pedigree charts in a hanging folder.
Second Green surname Holding File in a hanging folder.
Second Green surname family folders in their own hanging folders.
All other green files follow in this pattern.
Continue with surname pedigree charts and family folders for Red and Yellow surnames.

Tip 3. How do I handle the pedigree line of a surname that goes back one or more generations beyond the first 5 generations?

Print all the pedigree charts for that surname, starting from the first person who has that surname on your 5-generation pedigree chart.

File them in the front hanging file of that surname, together with the highlighted 5-generation pedigree chart.

Print and file extended pedigrees for all surnames that go beyond the first 5-generation pedigree chart.

Tip 4. What if I have two persons with the same grandparent on my pedigree lines?

If two persons on your pedigree lines prove to have the same grandparent, put a note in one of their files that says that particular line will continue in the file of the other person. From then on, just follow the one pedigree line because they will be identical. This situation happens when cousins marry.

To be sure that the grandparent really is the same for both persons, see *How To Recognize Your United States Ancestor* or *How To Recognize Your Canadian Ancestor*.

Tip 5. Where do I find the information to make family file folders for the parents of my great great grandmothers?

To find the parents of your great great grandmothers (numbers 17, 19, 21, 23, 25, 27, 29, and 31 on your pedigree chart), go to the set of pedigree charts you printed for each surname that extends beyond the first 5 generations, in Tip 3. Find the pedigree chart that shows the 6th generation. That pedigree chart will give you the names of the parents of your great great grandmother for that surname.

Tip 6. How do I file children of a family other than my direct-line ancestor?

Create a family group record for each nondirect-line married child. Include his or her spouse and their children.

File the family group records of nondirect-line children in their own manila folders behind the direct line parents' folder. Note that they are not a part of the alphabetical filing system but are filed right behind their parents. Put a colored dot in the upper right hand corner of the family group records of nondirect-line children so that you can quickly see they are nondirect-line. The color of the dot should be the same as the color of the parents' line.

To see an example of a family with parents and three nondirect-line children, [click here](#).

Separate folders for children are especially useful when tracing descendants. These folders will also be useful for keeping track of collateral relatives, if you choose to trace these lines.

Tip 7. How do I set up Locality Files?

As you research an area, you will find records which have information that is helpful for more than one family. Put these records in files organized by location.

When researching in the United States, Locality Files are useful for the states, counties, and sometimes the cities or towns where your ancestors lived.

In other countries, arrange Locality Files by the political divisions of that country. Some examples for various countries follow:

Brazil	Canada	England
State	Province	
	County, when one exists	County
City or town	City or town	Parish or town

France	Germany	United States
Old province or new department (include number)	Province	State
	District (Kreis)	County
City or town	City or town	City or town

These examples show what to put in each file. Available records vary depending on the location.

In a state, province, or department file folder, put the following kinds of items:

- Guide to the state, province, or department archives.
- Will index for the whole state, province, or department for the surnames you are interested in.
- Census index for the state, province, or department for the surnames you are interested in.
- History of the state, province, or department.
- County boundary changes for the whole state, province, or department.

In a county file folder put the following kinds of items:

- Printouts from the Family History Library Catalog.
- Index to the county court records for surnames you are interested in.
- Index to county land records: grantor and grantee indexes for surnames you are interested in.
- Pages from a book of marriages in the county for the surnames you are interested in.
- Tax lists for certain years in the county.

In a city or town file folder, put the following kinds of items:

- Cemetery records.
- School census.
- City map.
- Map of ward boundaries within the city.
- Church records from churches in the city or town.

For further suggestions of records to search for a locality, see the Family History Library research outline for that locality; or click on **Family History Library Catalog**, click on **Place Search**, and type the name of the locality you want records from.

Arrange these folders in the Locality File box alphabetically by the names of the political subdivisions of the country you are working in. Put towns alphabetically within a county. Put counties and their towns alphabetically within a state, province, or department. Put states, provinces, or departments alphabetically within their countries.

File these documents in standard green hanging folders. These instructions give no color coding system for the Locality Files.

Tip 8. How do I keep the basic file folder system updated and useful?

Once you get your basic file folder system set up, you should realize that you need to treat your filing system like a living creature. It needs to be "fed, watered, and loved!" Following are suggestions on how to do so:

1. Set up a simple "in box." Any box you have will do.

- Place every new item (documents, e-mails, correspondence, etc.) in the in box until you have time to file the items in Holding Files, family folders, or Locality Files.
- Take a few minutes every day to look over a couple of items and decide where each item needs to be filed. Write the name of the family the document pertains to or the Locality File where the document should be filed in the upper right hand corner of the document, such as "File: Smith, John" or "File: Cumberland Co., New Jersey." For family documents, you can also put a color mark in the corner by the person's name to remind yourself which color the document should be filed under.
- Make a rule with yourself that you will file at least one item a day into your basic file folder system.

2. Work on researching one family at a time.

- Think one family's research problem through and make a To Do List of questions you want to research.
- Do the research needed to answer the questions on your To Do List. Record on Research Logs the names of records you search and whether the record had information that was helpful or not.
- Label the documents you find: "File: Smith, John." File the documents.
- Type information about individuals you find into your computer genealogy management program. Type documentation into **Sources**, and write explanations in **Notes**.
- Write up a brief summary report of what you've found concerning this family. Use a word processor if possible.
- When new ideas come to you about the research problem, rename the summary report and add to it or change it. Do not just change the old report. The old report and new report side by side help you see where you've been and where you are now headed in your research.
- File printed copies of summary reports in the family folders involved.

As you continue in this process, you will discover that step by step your genealogy research questions are being looked at, analyzed, worked through, and solved. What a satisfaction that is!

Where to Find It

Internet

The following Internet sites have information on organizing paper genealogy files:

- Cyndislist: Organizing Your Research lists many sites dealing with genealogy organization.
- FamilyRoots Organizer explains genealogy organization and tools.
- Organization of Genealogical Materials
- Ancestry's Get It Together Archive.
- Beginner's Guide to Family History Research, Chapter 3: "Organizing Your Family Records, A Filing System."