

Genealogy Filing Systems

Your system

Many genealogists use different systems. Irrespective of the perceived advantages and disadvantages of systems, often the one you know and use is best!

Why do we need a filing system?



Why do we need a filing system?

- Simply to record the documents in your possession (i.e. a catalogue)
- To find and copy documents for family or another researcher
- To find and copy a document to include in a report or family history book
- To verify the information in a document which might conflict with that of another researcher or website – you may have incorrectly transcribed something
- To check what might be missing from your research

Whatever the reason, the information should be easy to find

Before Computers

When I first started researching my Family History/Genealogy, it was suggested that I put documents into 4 folders (manila folders, lever-arch folders, file boxes, etc), labelled with family branch names as follows:

- Paternal grandfather
- Paternal grandmother
- Maternal grandfather
- Maternal grandmother

Before Computers

The 4-folder hard-copy system soon proved insufficient due to:

- One folder growing too large and needing to be subdivided into separate branches.
- Many documents (photo's certificates, newspaper articles, etc) often referred to people from different branches of the family tree.
- Where do documents for a married woman get filed – birth name or married name?
- Some items could not easily fit into a folder (family bible, war service field book, passport, heirloom objects, lots of photo's)
- Documents within a folder could become hard to find

DOCUMENT FILE A
INDEX

update
7x+ ?

SURNAME	FIRST NAME(S)	PAGE(S)
Arms	Mary Jane	15
Bates	Agnes	14, 15, 37, 63
Bates	Alice Agnes	33
Bates(s)	Ann	10
Bates(s)	James	10
Bates	Mary Ann	1, 33
Bates	Rose Ann Elizabeth	1, 33
Bates(s)	Thomas	1, 10, 33, 34
Blackburn	Myrtle Moustere	16, 23
Bolton	Mary	5
Brierley	Honey	2
Brierley	Mary Jane	2, 53
Campbell	Archibald	3
Campbell	Isabella	3, 4
Carmichael	Colin	3, 4, 39
Carmichael	Isabella	3, 4, 39
Carmichael	Janet	3, 32
Carmichael	John	3
Cockburn	Ann	6
Cook(s)	Florence Beatrice	36, 37
Daniel	Ann	10
Durkin	John	12
Durkin	Roxanna	7, 12, 13, 62
Edwards	Sarah Ellen	44
Fitzgerald	John	58
Fitzgerald	Kate	58
Fitzgerald	Margaret	45, 54, 55, 56, 57, 58
Goodlet	Andrew	6, 32
Goodlet	Andrew Coburn	39
Goodlet	Ann	6
Goodlet	Emily	29, 31
Goodlet	Hugh	5, 6, 29, 31, 32
Goodlet	Isabella	31
Goodlet	Isabella Campbell	20, 29, 31, 72
Goodlet	Janet	32, 39
Goodlet	Phyllis May	18
Goodlet	Shirley Maryholm	18
Goodlet	William John	18
Goodlet	William John	20
Hamilton	Euphemia	74
Hamilton	James	74
Hamilton	Jessie	74
Hamilton	Mary	19, 29, 74
Hamilton	Mariane	74
Hogan	Kate	58
Horan	Catherine	54, 56
Hornden	Edwin	42
Hornden	Maria	42
Hornden	Mary Elizabeth	42
James	Clara Sophia	35
Jones	Margaret	11
Jones	Mary Ann	1, 33

R.G. 100

Nº 53210

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NEW ZEALAND
CERTIFIED COPY OF ENTRY OF BIRTH
IN THE REGISTRAR-GENERAL'S OFFICE

Registered at: WELLINGTON

Child	
1. When born	9 September 1948
2. Where born (Town or locality only.)	Wellington
3. Christian or first names (If twin, state whether elder or younger) (If stillborn, state so.)	Campbell John
4. Sex	M
Father	
5. Name and Surname	James George Stanford
6. Profession or occupation	Softgoods Manufacturer
7. Age	34
8. Birthplace	Worcester, Worcestershire, England
Mother	
9. Name and Surname	Gwendoline Stanford
10. Maiden Surname	Richmond
11. Age	28
12. Birthplace	Wellington
13. Name and Surname of Child, if there has been any addition or alteration after registration of birth.	-

Certified to be a true copy of the above particulars included in an entry of birth in the records of the Registrar-General's Office.

Given under the seal of the Registrar-General at Wellington, the
27th day of October 19 72



The fee for this certificate is
\$1.00

CAUTION—Any person who (1) falsifies any of the particulars on this certificate, or (2) uses it as true, knowing it to be false, is liable to prosecution under the Crimes Act 1941.

SO 14. 7/72-8070 W.E.

Indexed Folder

Indexed Folder overcomes some of the Deficiencies with 4-folder system

- ~~One folder growing too large and needing to be subdivided~~
- ~~Many documents (photo's certificates, newspaper articles, etc) often referred to people from different branches of the family tree.~~
- ~~Where do documents for a married woman get filed – birth name or married name?~~
- ~~Some items could not easily fit into a folder (family bible, war service field book, passport, heirloom objects, lots of photo's)~~
- ~~Documents within a folder could become hard to find -~~ **Index used**

In my computer programme, there is a field where I cross-reference to Doc File no.

Another filing option

- Instead of filing based on family names, you could file under:
 - event types e.g. Births; Marriages; Deaths, Other Events? , or
 - document types, e.g. Birth certs, marriage certs, death certs, photos, etc
- Maybe subdivide these files into family names, branches, countries, etc?
- Challenges can be similar to the “4 folder system”

Loss of hard-copy documents

If not digitised, hard-copy (e.g. printed) documents are exposed to loss due to:

- Fire
- Water damage
- Theft
- Quality reduction due to age, incorrect storage, etc

Once digitised, files need to be entered into a computer filing system

Before Computers

There were no practical means for genealogists to back-up physical documentation.

Commercially, a certain number of records were micro-filmed or micro-fiched.

Computer Filing System



Storage in a computer programme or online website

Do not rely solely on documentation on online websites/programmes

- Images stored on an online website/programme could become inaccessible due to unpaid subscriptions or closing of the website.
- Similarly, images stored only in an off-site programme could experience access difficulties.
- You probably have a lot of documentation in addition to that entered into your computer programme or website.

Computer Filing System

Provides a means to easily back up your information onto flash-drives, external hard drives, the Cloud, etc.

For example, if you are using Microsoft OneDrive (or some other similar app), all documents under the Windows “Documents” folder are automatically stored on the Cloud – and accessible from wherever you are!

Can eliminate the need to retain “hard copies” – unless heirlooms, rare or very personal.

My System

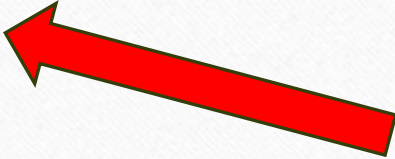
- How often would you search for anything without targeting the name of the person? Do you ever just want to see all certificates, or photos, etc?. Surely, it's information about one person you're seeking?
- A one folder per person system can hold all certificates, docs, pics, photos, videos, newspaper articles, snips from websites, scans etc that relate to the person of interest. That way at a glance you see all the info about that person without searching other folders. Very handy when writing a Family History book.

My System

I create genealogy folders using the Microsoft Windows file system, quite independent of any specific website or programme.

Windows typically has folders called:

- Documents
- Pictures
- Music
- Videos



ALL my genealogy information and associated folders are recorded under the Windows “Documents” Folder irrespective of file type (e.g. documents and photos).

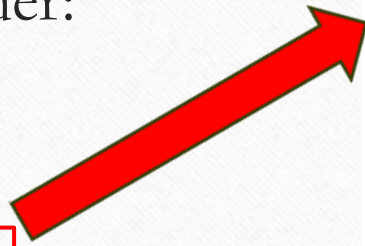
Creating folders for each person in your database

- Create a main folder (under Windows “Documents”) called “Genealogy” and under that “Documents Library” or “Genealogy Data Folders”, as well as other folders for general information
- Create sub-folders under the main folder for each person in your database, or each person that currently has documents requiring to be stored
- I also create a sub-folder for “yet to file” (with further sub-sub-folders with family branch names)

My System

Under the “Genealogy” folder:

Starting the folder name with “aaa” ensures that it sorts first on the list of folders



- aaa Genealogy Data Folders
- Military
- NZSG
- Places
- Research Tasks
- Resources and articles
- SeniorNet Genealogy
- Shipping

My System

Under

“aaa Genealogy Data Folders”

- ✓ aaa Yet To File
- ✓ Adams Anthony John 1971 0 [750]
- ✓ Adams Braytten 0 0 [2103]
- ✓ Bates Thomas Albert 1904 0 [1720]
- ✓ Bolton Mary 1772 1839 [122]
- ✓ Goodlet Agnes 1897 1956 [1182]
- ✓ Margison Ann Sheply 1948 2015 [2]
- ✓ Ross Alexander 1912 1972 [18]
- ✓ Stanford Campbell John 1948 0 [1]

My System

Under

“aaa Yet to File”

 Goodlet

 Margison

 Richmond

 Stanford

Folder structure

- Surname (maiden) (space) First Name(s) (space) Birth year (or zero) (space) ; Death year (or zero) (space) [ID no from your genealogy programme] – e.g.
 - Shepley James 0 1863 [404]
 - Ross Alexander 1912 1972 [18]
 - Bate Thomas 0 0 [1986]
- Use of square brackets helps to search exclusively for names in this folder system e.g. search field “[404]” by avoiding all other references to people with the same name.
- Only need to set up a folder if you have items to store in it.
- Update birth/death dates when and if you remember.

How to create folders

- It's easy for anyone with few people to create folders manually.
- I used various techniques to create 6000 plus folders for Barbara. If someone is keen to adopt this filing system, I would be happy to assist.
- Once the folders are created, it's up to the users to progressively move data from existing folders to these new ones.

What to put in these folders

- All information which references the subject person
- Where several people are referenced in a document or appear in a photograph, etc., copy to each data folder for those people. Storage is no longer expensive as it once was.

Folder contents – Ross Alexander 1912 1972 [18]

ROSS Alec Military data
 ROSS Alex Depression Riots May 1932
 ROSS Alexander and Ruth NZ Electoral Rolls
 ROSS Alexander Criminal
 Alexander Ross - Online Cenotaph - Auckland War Memorial Mus...
 ROSS - STANFORD NZ mar cert 1935.jpg
 ROSS Alex (2).jpg
 ROSS Alex Watersiders Cricket Team (before the ...
 Ross Alex.jpg
 ROSS Alexander Barbara & Ruth.jpg
 ROSS Alexander Barbara & Ruth.tif
 ROSS Alexander Death Notice Dominion 18 Nov 1972.jpg
 ROSS Alexander Death Notices (prob Evng Post)1972.jpg
 Ross Alexander NZ Death Cert 1972 folio no 22496 Entry n...
 Ross Alexander NZ Death Cert 1972 form RG 4A no 62034.jpg
 Ross Alexander NZ Death Cert 19721.jpg
 ROSS Alexander portrait.jpg
 ROSS Alexander SCT birth cert 1912.jpg
 ROSS Alexander SCT birth Register 1912 ScotlandsPeopl...
 ROSS Alexander SCT birth register 1912.JPG
 ROSS car accident - newspaper clipping [Barba...
 ROSS Family Home 4-100 Adelaide St for sale 2022 (2).JPG
 ROSS Family Home 4-100 Adelaide St for sale 2022.JPG
 ROSS Family Home 4-100 Adelaide St Property Vale...
 ROSS Family Home 4-100 Adelaide St Property Valu...
 ROSS Florence and children Passenger List Arrival 1916 F...
 ROSS Florence and children Passenger List Arrival last pag...
 ROSS Florence and children Passenger List Departure 191...
 ROSS household 100 Adelaide St (2).jpg
 ROSS household 100 Adelaide St.jpg
 unknown; Gwen & Jim STANFORD; Alec & Ruth ROSS, ...
 unknown; Gwen & Jim STANFORD; Alec & Ruth ROSS, ...
 unknown; Gwen & Jim STANFORD; Alec & Ruth ROSS, ...
 Watersiders Cricket Team Before WW II Attached N...
 Watersiders Cricket Team Before WW II.jpg