Color-coded
Genealogy Research Filing System

Starting out organized is easier than getting organized later on. It didn't take long before my own research became paper bound with pedigree charts, family group records, to-do lists, research logs, documents, notes and research tools. I was robbing myself of the precious time I had for research because I spent hours looking for what I knew I had and duplicating research I had already done. When I became organized I was able to:

• Know exactly what information I had for each ancestor.

• Had a complete list of information I was missing for each ancestor.

• Knew exactly what resources I had checked and results of my research.

• Knew every book I had ever searched.

• Remembered who I had contacted and the response I had received.

• Could easily file new research findings.

Choose an organization system that genealogists use. There are several popular genealogy organization systems. Research the systems and use the one that fits your style and one you will actually use.

Recommendation: I have evaluated and started (and then subsequently abandoned) several filing systems. I took a class from Mary E. V. Hill on a filing system and I reorganized my genealogy using her color coding filing system. It is extremely flexible—the more ancestors you find, the more expandable and flexible the system becomes. It can be multi-generational and strictly linear at the same time. The system is simple to set up, simple to maintain, well organized, and inexpensive. The system is easy to understand for the researcher and the mildly interested relatives alike. I can find anything in just a few seconds.

 I have used the concepts to organize my paper files, computer files, and oral/personal history files. I would like to share with you the step by step instructions for helping you become organized using the color-coded genealogy research filling system.

 Color-coded Genealogy Research Filing System

Getting Started
The following 4 steps will help you begin to organize your family records and documents.

Step 1. Gather items having genealogy information. Place a box in the middle of the floor or somewhere that will catch your attention. Start gathering together items you already have that give genealogy information such as documents, newspaper clippings, pictures, letters and so forth. This is not the time to decide what does or does not have value to you as a genealogist. Whatever you find around the house, place it in the box.

Step 2. Fill in a pedigree chart. Write down your name and the names of your parents and grandparents. Include birth, marriage, and death dates and places if you know them. Take special note of the four surnames that you listed on the pedigree from both sets of your grandparents. You will use these surnames in Step 3. For example the names of my parents and grandparents are:

Father: James Ewell
Fathers' parents: Arthur Ewell and Robera Jolley

Mother: Mary Jones
Mothers' parents: Ora Jones and Vera Dearing

I used the surnames names of Ewell, Jolley, Jones, and Dearing in Step 3.

Step 3. Separate the items found in Step 1 into surname labeled boxes.
It's now time to temporarily divide the items you found in step 1 into four separate boxes, each labeled with one of the surnames (last names) of your grandparents. I like to use containers that are the size of apple boxes. Sort what you have gathered, putting items belonging to the family or ancestors of one of the surnames into the container labeled with that surname.

Step 4. Create and expand pedigree charts and family group records. Look at the items in each container

and see if you have information about births, marriages and deaths of your ancestors. Using the information you find, add new names, dates, and places to your pedigree chart. Make family group records for each family on your pedigree chart. If you use a computer genealogy program, such as PAF, Roots Magic, or Legacy, enter your family information into the program. Don't worry if you can't fill in all the names and dates. Just start with you what you know.

Setting Up the Color-coded Filing System
There are 13 steps for setting up the color-coded filing system.   The system is time tested and proven to be the organization resource that will grow with you as you expand your research.

This system sets up file folders for the families on your pedigree lines, and also shows you how to file information about cousins and other relatives. Pedigree charts and corresponding family group folders are divided into 4 colors, based on the lines of your 4 grandparents. Dividing your pedigree by color helps make it clear which line a family belongs to. For each family on your pedigree, a family file folder holds documents and a copy of that family's Family Group Record. Don't think you have to do all the steps outlined in one day. Pace yourself. Check each step off as you do it. This system will keep your genealogy records organized for your own benefit and to hand on to your posterity.

Step 1. Gather supplies for your filing system.
This system works best if you gather together the following basic supplies:

- **2 file boxes.** Boxes with lids. The boxes need to be strong   preferably made of plastic and with inner ridges or groves for hanging letter size hanging files.

- **Hanging files colored.** Hanging files, letter size, in colors blue, green, red and yellow. They come with 1/3 and 1/5 cut slots, which has to do with the size of the plastic tab. Choose the 1/5 cut, which works best with this system. Hanging files keep the manila folders from slipping down in the file box.

- **Hanging files - standard green.** Hanging files, letter-size, in generic standard green color, 1/5 cut.

- **Manila folders.** Manila folders, 1/3 cut tabs assorted, with reinforced tops to last through heavy use. Start with 50 folders.

- **Pens.** Pen with ultra fine point, felt tip, black permanent ink.

- **High lighters.** High lighters colored light blue, light green, yellow and pink (don't use red because it is too dark.) Colored pencils also work.

- **Labels for file folders.** Labels with blue, green, red and yellow strips along the top and permanent adhesive on the back.

- **Dots.** Dots colored blue, green, red and yellow. Not available with permanent adhesive.

- **Prong bases, clips, punch.** If you want to clip papers into manila folders, these tools are useful. The 2 hole punch is the one you need.

- **Acid free paper.** Paper that is acid free extends the life of your notes. Good quality photo copy paper is almost acid free.

- **Other boxes.** Boxes for expanding your files, as needed.

- **Carrying case.** Carrying case, letter-size with a handle, to take with you when researching.

- **Large wall size pedigree chart; CD or video.** Large pedigree chart helps you to see clearly your family lines (optional). Available from commercial genealogy suppliers. The chart sold at www.123genealogy.com is laminated for you to write on. Use CD or video to review the class instructions.

Tip: What type of highlighters should I use? I would recommend that you find the type of markers you use to highlight in a book because they won't absorb through your paper and make a mess.

Tip: Why am I buying boxes when I have a filing cabinet? You can use a filing cabinet if you want, but I have found it very convenient to use boxes. I can pick up the box and take it over by my computer or put it on the dining room table when I'm working with my research and organization.

Step 2. At the front of your file box put pedigree charts of your lineage.
Label the tab of a standard green hanging file Pedigree Charts. Put a copy or printout of your pedigree charts, starting with yourself, in the file. Hang the file in the front of the file box. This set of your pedigree charts will act as a map for your family files. PAF Companion and Legacy will print pedigree charts in the 4 colors, blue,

green, red, and yellow. Add more charts as you find the information.

Step 3. Study the Circled 5 Generation Pedigree Chart.

Study the Circled 5 Generation Pedigree Chart. It is a crucial key to understanding how the color-coding of family files works in the filing system using the five-generation pedigree chart. Each of the circles on the chart represents a family, and each circle has a color. In the steps that follow, you will learn to use those colors to set up your filing system.

See Figures 1 and 2 for example 5 Generation converted to color-coded system.

> Tip: Do I really need to use five-generation chart? Experience has shown that this system is set up most easily based on a five-generation chart. The four-generation chart does not work and confuses people. As your research progresses, you will be able to expand this system and go way beyond the five-generation chart.

> Tip: Can I use the same five-generation chart for myself and my spouse's line? When I set up my system, I used a five-generation pedigree chart for my direct ancestors and a separate one for my wife and her ancestors. It is possible to start with one of your children as no. 1 on the chart. However, then you only have two colors for the husband's lines and two for the wife's lines. I prefer the advantage of having the four colors for my own four grandparents.

> Tip: Who should be in the number 1 position on the pedigree chart? The real purpose of the filing system is to help you do genealogy research, and if you are really going to concentrate on doing your own lines, you probably want to start with yourself as number one. It will make using the color-coded system easy to follow when you are sorting the blue, green, red, and yellow sections for your four grandparents. Because I was working with two pedigree charts, I put myself as #1 for my family line and my wife was #1 for her family line.

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 # 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.

Allow me to explain in further detail how to relate chart to your own pedigree chart. I have created the following exercise to walk you through mapping your pedigree chart into blue, green, red, and yellow. Look at your pedigree chart. Notice the numbers that are associated with different names. You are #1, your father is #2, and your mother is number #3. I will review refer to these numbers throughout the exercise.

1. Start with the blue highlighter. Place a blue line under your name #1, your father's name #2, and your grandfather's name #4. Put the blue highlighter away and open the green.

2. Highlight your father's mother #5 with green. Now pick up the blue and put a circle around the numbers 4/5 family. Are you beginning to see how this works? The grandmother introduces the green family line, but it is a blue family. Why is it blue? In this filing system, we file information under the name of the father. It is blue because the father in this situation is highlighted with blue.

3. Let's now use the pink highlighter for red (if you actually use a red highlighter, it will block out the name. Draw a pink underline under your mothers' name #3 and your mother' father #6.

4. Now we are ready for the yellow highlighter. Underline your mothers' mother #7 with the yellow marker. She introduces the yellow line.

5. Take up your pink highlighter again and draw a circle around the numbers 6/7. This family unit will be red because the father is red.

6. Pick up the blue highlighter again and draw a circle your family unit (i.e., yourself #1, father #2, and mother #3). With the blue still in your hand, circle the family units of numbers 8/9, 16/17, and 18/19. Your father and all his ancestors as far back as you discover them will be blue.

7. Take the green highlighter and circle the family units of 10/11, 20/21, and 22/23. Your father's mother and all her ancestors will be green.

8. Use the pink highlighter to circle the family units of 12/13, 24/25, and 26/27. Your mothers' father and all his ancestors will be red.

You have filled out your own personal 5-generation pedigree and circled each family. In the steps that follow, you are going to see just how important the chart really is. It is the map to the rest of what you are going to do. I would recommend that you purchase a sheet protector and put your circled 5 generation chart back to back with the sample chart.

See Figures 1 and 2 for example 5 Generation converted to color-coded system.

When I finished this exercise for the first time, I understood the logic between the color system—with me as the child with blue for my father and his parents; green for my father's mother and her parents; red for my mother and her parents; yellow for my mother's mother and her parents. As I get information, I have colors in my mind attached to the names of the people that I am working with, and with those colors, I can quickly remember where to put it, where to find it, and it gives me a sense of direction that, heretofore, I haven't had.

> Tip: What if I can't do everything exactly as explained? I found it's important in doing a filing system that you not get too bogged down on the details. If you run into a snag and you can't do it exactly the way the instructions say, do it the best you can with what you have. Feel free to experiment. Try it and see if it works. Nothing that you do is going to be set in concrete. You can redo it if you need to, and if you find something works, great, and if you find that it doesn't, you can go back and make changes.

Step 5. Put 16 hanging files into your box.
Place 4 blue, 4 green, 4 red, and 4 yellow hanging files in your box, in that order.

Step 6. Label the colored hanging files with your family surnames.
Label each colored hanging file with the surname of one of your 16 great great grandparents. There will be 4 surnames in each color. Use the 16 surnames that go down the right side of your 5 generation pedigree chart to know which surnames to put within each color.

Place all the tabs on the left side of the colored hanging files.

• Write one surname on each hanging file tab (plastic tabs come with the colored hanging files.) Use a permanent black-ink ultra fine point pen for writing names. Rather than write the names by hand, I chose to print labels on from my computer with color-coded labels.

• Hang the files in alphabetical order within a color. Put the blues alphabetically in one group, the greens in another, the reds in their group, and the yellows in a group so you can separate out one color group into a new box if the original box gets too full with all your documents etc.

It's OK if you don't know the last name of any of your 16 great great grandparents. Label as many of the files as you can and leave the other blank tabbed files in the box for future use.

> Tip: Where are my great great grandparents located on the five-generation chart? Your great great grandparents are the people who are listed with the numbers 16 to 31 on your 5 generation pedigree chart. For example, the surnames for my blue files will come from the lines 16, 17, 18, and 19 (i.e., Ewell, Weech, Thompson, Frisby). The surnames for the green files will come from lines 20, 21, 22, and 23 (i.e., Jolley, Spriggs, Boyter, Niell). The surnames for the red files will come from lines 24, 25, 26, and 27 (i.e., Jones, Dahle, Jones, Bevan). The surnames for yellow files will come from the lines 28, 29, 30, and 31(Dearing, Parkin, Hickman, Carrel).

> Tip: Why are the tabs placed on the left side? Putting surnames on the left-hand side is something that developed over time by people using the system. The files on the left are the surname hanging files for the pedigree charts. It's the front piece of the surnames that go behind that particular folder. So if it's the Ewell folder, it's going to have Ewell pedigree charts in the front folder, and it's going to have Ewell families behind it. It makes it very easy to quickly locate these files. In the steps that follow you will learn about the positioning of the other files.

> Tip: What surname do you use on the label if you find it spelled multiple ways? In one of my family lines I have the German name, Diehl. I have five different ways that name can be spelled, and I have tried writing on my tab-- Diehl/ Deal/ Dill/ Deel/ Dehl. I chose to use the most common Diehl spelling that was used the United States. I then placed a note in the file explaining my decision along with a list of the various spellings.

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 # 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.

Repeat the process of highlighting a surname line and filing the pedigree chart in its surname hanging file for each of the 16 surnames. These charts will be used as guides or maps for each of the surname folders. Highlighting the surname on the pedigree chart makes it quick and easy to see how that surname fits into your complete family pedigree.

> Tip. What if your research goes one or more generations beyond the 5 generations? You may want to print all the pedigree charts for one surname, starting from the first person with that surname on your 5 generation pedigree chart. Staple together and file these pedigree charts in the front hanging file of that surname, together with the highlighted 5 generation pedigree chart.

> Tip. What if I have two persons with the same grandparent on my pedigree lines? This situation happens when cousins marry. If two persons on your pedigree lines prove to have the same grandparent, put a note in one of their files saying that that particular line will be continued in the file of the other person. Name the other person, so the charts are easy to find. From then on, just follow the one pedigree line because they will be identical.

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

This is a really exciting moment in the creation of our filing system. You are now going to identify and pick out each family as a unit, as a group. And each family gets their own manila folder in which you can begin to organize your research. Start by printing or writing a family group record for each of the families on your 5 generation pedigree chart.

• If you can identify all of these families, including the parents of your great great grandmothers, you will be setting up a total of 23 manila family folders. These 3rd great grandparents will not be on the 5-generation pedigree chart. You will have to go to the next chart to find their names.

• 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. Mark the color on the top of the family group record or print with PAF, Roots Magic or Legacy. 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 labels with permanent adhesive. The manila folders of parents should all be right-tabbed folders. Fold left-tabbed manila folders inside-out to make them right-tabbed, as needed.

Colored strip

Jones, Paul   b. 1845   m2
Smith, Jane   b. 1841

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, label which marriage this is, i.e. m2

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.

> Tip. Why do I want to set up family file folders for the parents of my great great grandmothers now? If you are going to have a family file folder for each of the 16 surnames in the fifth generation on your 5-generation pedigree chart, you are going to have to find the names of the parents of your great great grandmothers. Then set up file folders for these 8 families. Your 8 great great grandmothers will appear as daughters in these families. If you want to, you can do the same for your 8 great great grandfathers now. If you also do the parents of your 8 great great grandfathers, you will have a total of 31 family file folders in your system.

> Tip. 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 pedigree charts you printed and filed in the standard green hanging file at the front of your box. If you have the information about the 6th generation in your data-

base program already, find the pedigree chart that shows the 6th generation for a great great grandmother. That pedigree chart will give you the names of the parents of that great great grandmother.

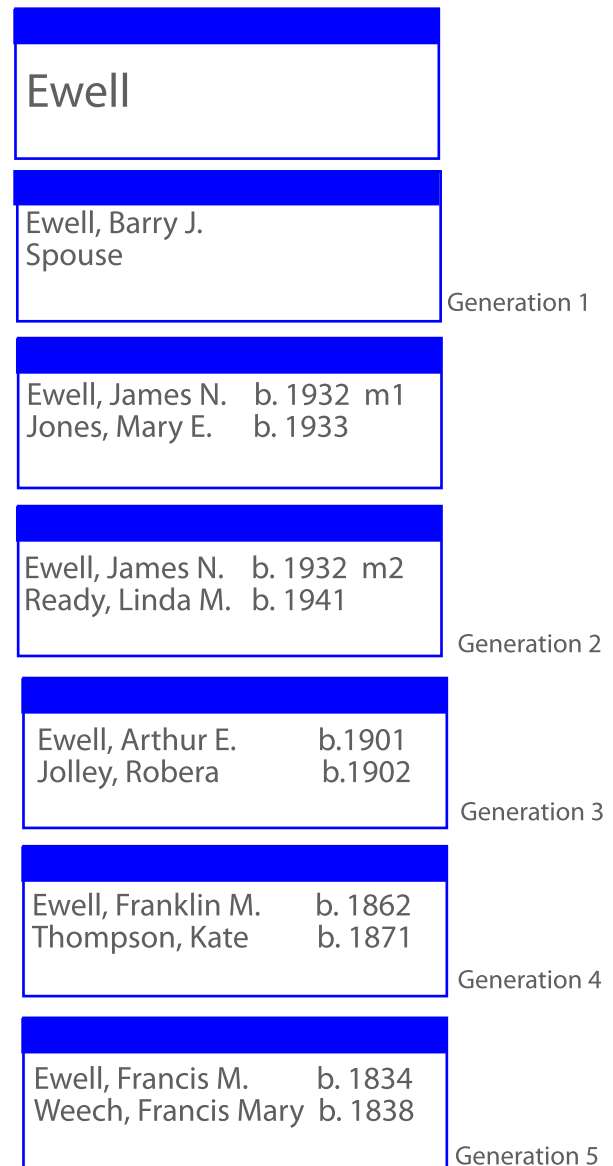### Step 9. File the manila family folders.

Put a new colored hanging folder behind each surname hanging file, matching the color of that surname. Place the manila family folders in these newly added hanging folders.

- Group the manila family folders by color and then by surname   all the "red" Smith's together, all the "yellow" Jones families together.

- You can now arrange the family folders in alphabetical order by the husband's first name or by the generation.

- 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.

   Tip: How do you manage Patronymics? For those of you who have Scandinavian ancestry or some of you have Asian ancestry-- any situation where the surname changes every generation, it can be a challenge. I prefer to file family members by location. In other words, these people tended to live for generations in the same parish and on the same farm, and I have found it easiest to keep them by generation going back, by location. Another option you may consider is to file each of the families by the name that they're known by in alphabetical order and then by date. I encourage you to look at the various options in patronymic filing and realize that it is possible to keep track of these people either by location or alphabetically and by date.

   See Figure 3 for more detail about Patronymics..

   Tip: How do you organize the files by generation? I choose to organize my family files by generation. Folder 1 would be the first generation, the second folder would be the second generation and so forth. I will align the family folder labels on the right side of the container. The following is an example of the first five generation family folders behind the Ewell surname (blue folders):

Ewell

| Ewell, Barry J. |
| Spouse |

Generation 1

| Ewell, James N. | b. 1932 m1 |
| Jones, Mary E. | b. 1933 |

| Ewell, James N. | b. 1932 m2 |
| Ready, Linda M. | b. 1941 |

Generation 2

| Ewell, Arthur E. | b.1901 |
| Jolley, Robera | b.1902 |

Generation 3

| Ewell, Franklin M. | b. 1862 |
| Thompson, Kate | b. 1871 |

Generation 4

| Ewell, Francis M. | b. 1834 |
| Weech, Francis Mary | b. 1838 |

Generation 5

Step 10. A family folder holds the following items.

Include in a family folder:

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. Do the non-direct line marriages in center-tab folders.

2. Documents you have already gathered, which belong with this family.

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

1. To Do List   a list of questions about this family which you want to find answers for.

2. Research Log   for keeping a record of sources you look at about this family.

3. Timeline for a chronology of this family's life events.

4. Maps pertaining to where this family lived.

5. Research notes.

6. New documents found.

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

These are all valuable tools, and as you will add these tools to each of the manila folders, you'll find that you'll be able now to systematically move forward--identify this family, document this family and have the feeling that you are really creating a good, strong accurate genealogy. I encourage you to understand what we want to do with the To-Do List, how to use a Research Log, how to keep track of where you've been researching with a calendar and how to use a timeline to be sure that you're not combining generations when they should be like, you know, a junior and a senior.

Tip. Is there a way that I can include folders about the individual children of a family unit? Using center-tab manila folders, create a file for each child, as the parent of a family. Include his or her spouse and their children. File these center-tab manila folders behind the direct line parent's folder.
Use center-tabbed manila folders for the children. This includes collateral line (aunts and uncles) families.

• They are filed right behind their parents, in birth date order of the related children (not the birth date of the spouse).

• Put a colored star on the upper right corner of your direct ancestor. The color of the star should be the same as the parent's line.

• 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 parent's line.
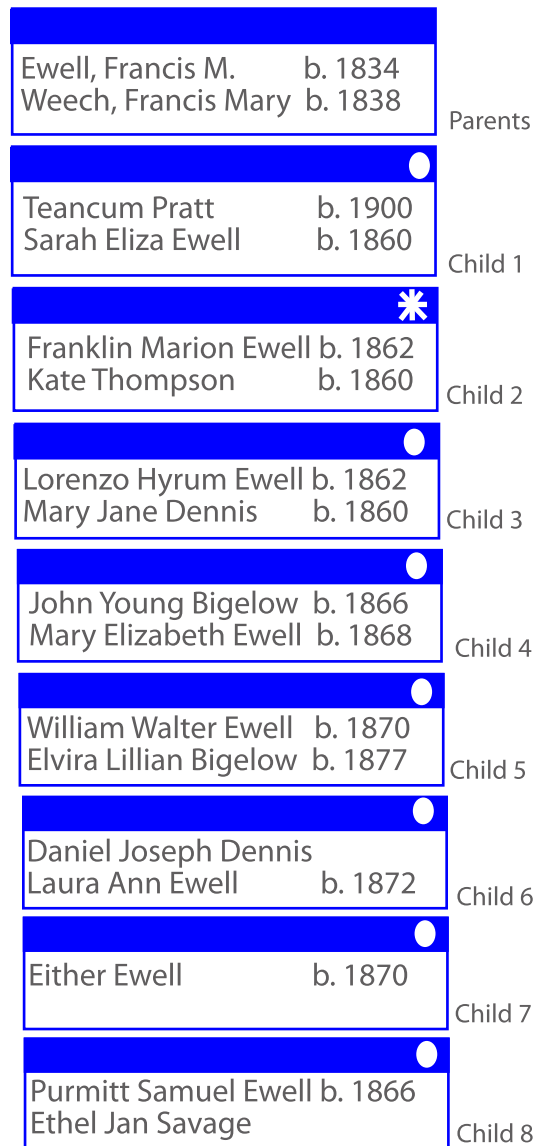
When I am filing papers about a direct decedent (folders with the star), I place all the information about a person in their years prior to marriage in the "Child" folder behind the parent (e.g., birth certificate, baptismal record). All information associated with the direct decedent following their marriage, I place in their family folder (e.g.,

marriage certificate, death certificate).

When I am filing papers associated with siblings of my direct ancestor (aunts and uncles) and their families, I will place any information I find in the child's folder (e.g., birth certificate, marriage certificate, death certificate).

When I create children folders, I will include the child's spouse on the label. It's a personal preference of mine.

The following is an example of how the children folders are organized for my great great grandparents:

Ewell, Francis M. b. 1834 Weech, Francis Mary b. 1838	Parents
Teancum Pratt b. 1900 Sarah Eliza Ewell b. 1860	Child 1
Franklin Marion Ewell b. 1862 Kate Thompson b. 1860	Child 2
Lorenzo Hyrum Ewell b. 1862 Mary Jane Dennis b. 1860	Child 3
John Young Bigelow b. 1866 Mary Elizabeth Ewell b. 1868	Child 4
William Walter Ewell b. 1870 Elvira Lillian Bigelow b. 1877	Child 5
Daniel Joseph Dennis Laura Ann Ewell b. 1872	Child 6
Either Ewell b. 1870	Child 7
Purmitt Samuel Ewell b. 1866 Ethel Jan Savage	Child 8

Step 11. Set up other useful files.

The files that we are going to talk about in Step 11 are as important as any of the previous files we have previously set up.   It would be nice if we could always get our genealogy to fit into surname files that we have set up, but that is not a reality. The Holding, Locality, and Help files are used when you find information that is useful for researching more than one family group such as a group of cemetery records for that surname in the same locality where your ancestor lived.

1. Holding Files

- Set up surname Holding Files to store items with information about that surname which includes more than one family of that surname.

- 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 see the need.

- When you have a large number of documents for a surname, it helps to create two Holding Files for that surname. Set up one folder as a temporary storage file, and the other to permanently store documents that have a great deal of family information in them. An example might be the parish registers of a church where your ancestors of that surname lived for 200 years. Be sure to go back and use the documents stored in the Holding Files!

   Tip: How do I store photographs in folders? Photographs should be stored in archival quality holders in 3-ring binders for long term preservation.

   Tips: How do you use the holding files? The most helpful part of this system for me when I first started, was the holding files, because then I took my piles of information and broke it down into big groups of surnames and then they became actually very manageable, and I could go refine and organize as I had time. There are two kinds of holding files that I find useful. For example, I have a temporary holding place for the Ewell family. There are times when I come home from research and for one reason or another I don't have time to sort my research. I just put them in in a temporary holding file--right behind the Ewell surname. When I have the time, I will sort the documents into the appropriate family and individual folders. When I have documents the pertain to several Ewell families (i.e., they were all going to the same church, buried in the same cemetery, and/or went to the same school), I will put this document into a permanent Ewell holding file that will go right behind the Ewell pedigree chart file.

2. Locality Files

Set up Locality Files for places (locations) where you are researching. You often find documents that contain information about more than one family from the same place. 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 can be stored in a file named for that locality. Information from these documents should be added to your computer database, such as PAF, Roots Magic, or Legacy, with a source reference and notes taken from the documents filed in your Locality File. Add Locality Files as you need them. Set up Locality Files for countries, states or provinces, counties, cities, parishes, or towns, as you find the need.

- Use standard green hanging files for Locality Files.

- Put these hanging files in the second file box you purchased.

The following are several scenarios of the organization structure of a locality box for different countries showing the sequence in which the files and folders will appear:

Brazil	Canada	France	Germany	United States
State	Province	Old province or new department	Province	State
City or town	County, when one exists	City or town	District (Kreis)	County
	City or town		City or town	City or town

What do you put in each folder? 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 or parish boundaries within the city.

- Church records from churches in the city or town.

  Tip: Can you provide an example for setting up locality files? Anyone that does family history gets into places fairly heavily, and so you end up getting records about many people, not just your direct line. You need to create files that deal with county records, census records, all kinds of different things about the place. When I started using locality files, I was researching ancestors from the state of Kansas. I set up a totally separate container with the label Kansas. The first folder in the container was set up for maps (i.e., road maps, period maps). The second folder was labeled Kansas in which I put genealogical and historical publications from Kansas. Following the Kansas folder, I set up a series of folders with the names of the counties I was researching. These folders are alphabetically organized. I then have the ability to add folders as I need them behind each county. For example, when I was researching the city of Otis, Kansas, I secured cemetery records from a Methodist and a Lutheran cemetery. Behind the Rush County file, I added a file for each cemetery and dropped the records associated with each cemetery into each folder.

  Tip: When do I create a holding file Vs a locality

file? Someday you're going to run across a list of cemetery records, and you're going to look at it and you're going to say "There were six of my families with six different surnames in this cemetery. Which one of my family folders am I going to put this cemetery record in?" And then you will ask, "Do I need a holding file or a locality file." A locality file works if that cemetery is in a specific county (i.e., Rush County) and all six of those families were in Rush County. That's a locality file. A holding file is created if you have lots of information about one surname (i.e., Wagner family) but you have the Wagner family getting land in ten different places. You can't just put that one list of deeds in one Wagner family because it belongs with lots of Jones families, and so that's when you put it in a holding file.

3. Help Files
Set up Help Files, as needed, for tools such as language aids, religion information, or handwriting. Put Help Files, grouped 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 boxes for each color   sometimes with several boxes for a color!

  Tip: Do binders have a place in the color-coded organization system? Three ring binders do have a place. I will share several experiences with you.

- There have been times where I have been researching a complicated brickwall type problem in which I included a To-Do List, maps, pedigree chart, family group records with Research Logs for the various families, copies of documents and so forth. Once I have resolved the research, I write a case summary explaining my research and findings and put it in the binder and then store the binder on its side in the box next to the family folder and then I continue to use the family folders for continue research. Label the binder with the name of the person you researched in that binder such as Smith, John. Why did I keep the research in the binder? Because I wanted the research, documentation, and analysis to stay together to review as needed and for future researchers.

- There are times when I have very precious, one of kind artifacts that I do not want to go in to the filing systems. I will use archival supplies and binder to help preserve the artifacts.

- Once we took a month-long research trip back to Virginia, Tennessee, Pennsylvania, North Carolina, and Washington D.C. I created binders complete with information I needed for each of the counties I was going to visit. The binder kept the research organized and together. Using folders in this type of research experience tend to get messy and shuffled. I had a binder for each person on the trip. When I came home I transferred the information back into appropriate folders.

There is a purpose for binders, but I am convinced that for your overall filing system, you will do better with manila folders.

Tip: Do you every use any other colors besides blue, green, red and yellow? Yes. Remember that the system is very flexible to expand to your research needs. When I began research on the ancestral lines of my step-parents, I chose to use the color purple to separate my research. I set the files up exactly as I had done for my ancestors in a separate box.

Tip: What are your thoughts about including descendents (Living) files? Yes the system is very flexible to help you keep track of family in both directions. I use the system to record and organize information about my wife and me, our children and grandchildren. I set up the family file for my wife and me. I then created a folder for each of children and their spouses and placed them in the order of their birth. As grandchildren are born to each family, we add a folder and place it behind folder of their parents. It makes it very easy for me to keep track of the precious documents and memories we share with our family. I chose to create these files and folders in blue. But it would be really easy to create a descendants box with another color like orange.

Step 13. How do I keep the basic file folder system updated and useful?

Once you get your basic file folder system set up, it is important to realize that your filing system will continue to mature as you continue your research. The following are suggestions on how to do so:

Set up a simple "in box."

Any basket you have will do. Place new documents, e mails, and correspondence, etc. into 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, i.e.:

"Smith, John" or "Cumberland, New Jersey." Make a rule with yourself that you will file at least one item a day into your basic filing system.

Work on researching one family line at a time.

- Pick one family line. Make a To Do List of questions you want to find answers for.

- Do the research needed to answer the questions on your To Do List.

- Record on Research Logs the records you search and whether the record had information.

- Label the documents you find (i.e. Smith, John) and file the documents.

- Enter information found into the computer. Enter documentation into Sources and make explanations in Notes.

How to Add New Surnames

Let's say you have a line where you know that Jeremiah Perry, b. 1748, Cumberland County, New Jersey, has a wife, Sarah. You know nothing more about her so you have her entered as Mrs. Sarah Perry.

One day, searching on the Internet, you find a reference to a Sarah Harris who was married first to a John Miller in abt. 1767 in Cumberland County, New Jersey. They had one child, and then John Miller died. Sarah Harris was then married to Jeremiah Perry in 1769 and had a son, Jeremiah Perry, b. 1770. That matches the Bible records you have perfectly!

The website goes on to give you three generations of Sarah Harris's ancestors with good documentation. After verifying the information, you want to add these new families to your filing system. Jeremiah Perry and Sarah Harris are in your Yellow line.

To add this information to the file:

1. Make new yellow hanging surname folders for: Harris, Crosley, James, Hand, and Johnson-the 5 new surnames you have now identified.

2. Add highlighted pedigree charts to the folders to see how these people are related to you.

3. Make family groups for Sarah Harris as a child with her father, Jacob Harris, and mother, Rachel Crosley.

4. Continue making other family groups and filing them for each of these new families.

It is just that simple to add new families to your filing system as you find new information.
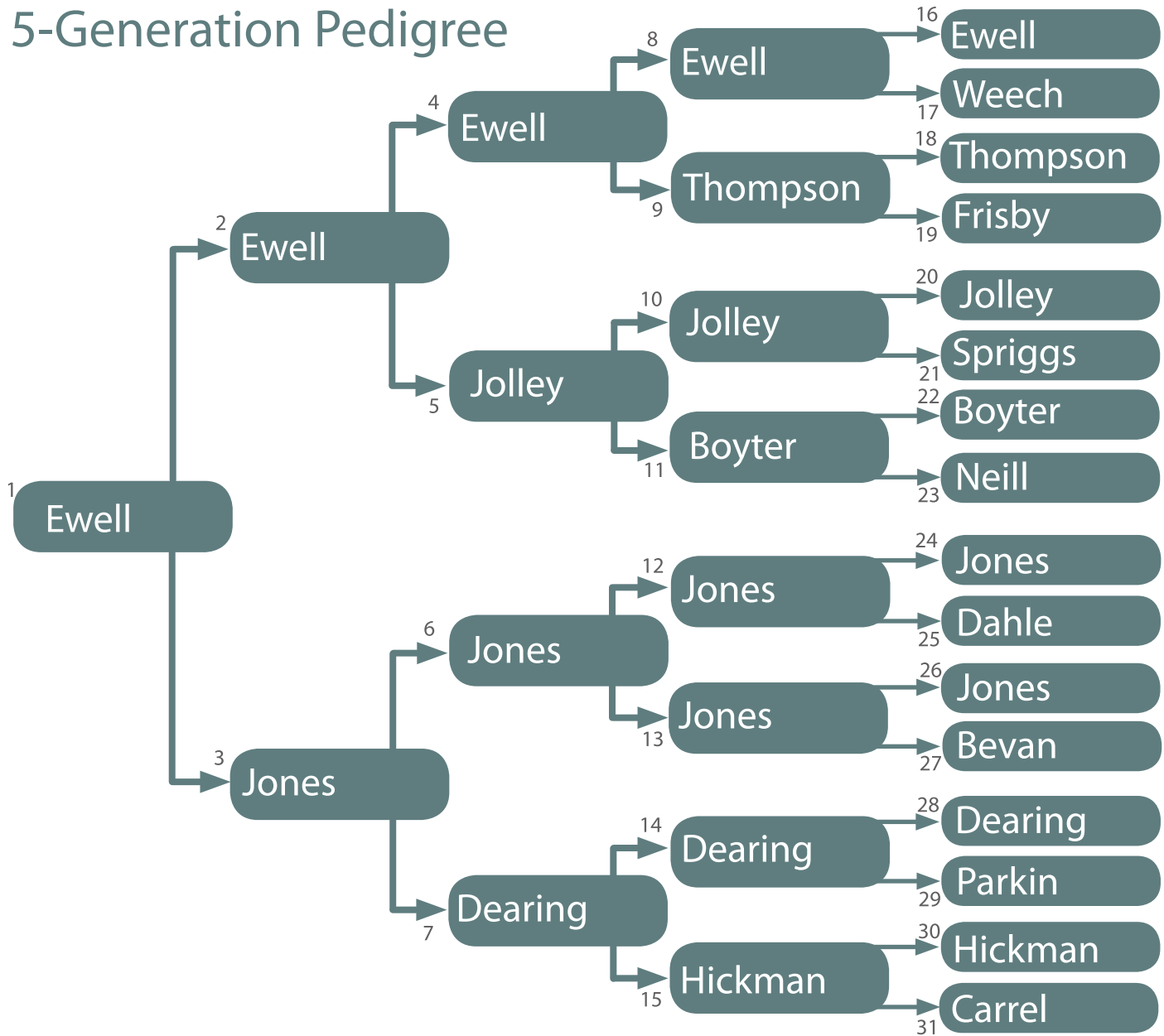
5-Generation Pedigree

					16	Ewell
		8	Ewell		17	Weech
	4	Ewell			18	Thompson
			Thompson		19	Frisby
2	Ewell	9				
		10	Jolley		20	Jolley
	5	Jolley			21	Spriggs
		11	Boyter		22	Boyter
1	Ewell				23	Neill
		12	Jones		24	Jones
	6	Jones			25	Dahle
		13	Jones		26	Jones
3	Jones				27	Bevan
		14	Dearing		28	Dearing
	7	Dearing			29	Parkin
		15	Hickman		30	Hickman
					31	Carrel

MyGenShareQuickHelps

Figure 2

5-Generation Pedigree

Circle or highlight pedigree
chart by color

16 Ewell

8 Ewell

17 Weech

4 Ewell

18 Thompson

9 Thompson

19 Frisby

2 Ewell

20 Jolley

10 Jolley

21 Spriggs

5 Jolley

22 Boyter

11 Boyter

23 Neill

1 Ewell

24 Jones

12 Jones

25 Dahle

6 Jones

26 Jones

13 Jones

27 Bevan

3 Jones

28 Dearing

14 Dearing

29 Parkin

7 Dearing

30 Hickman

15 Hickman

31 Carrel
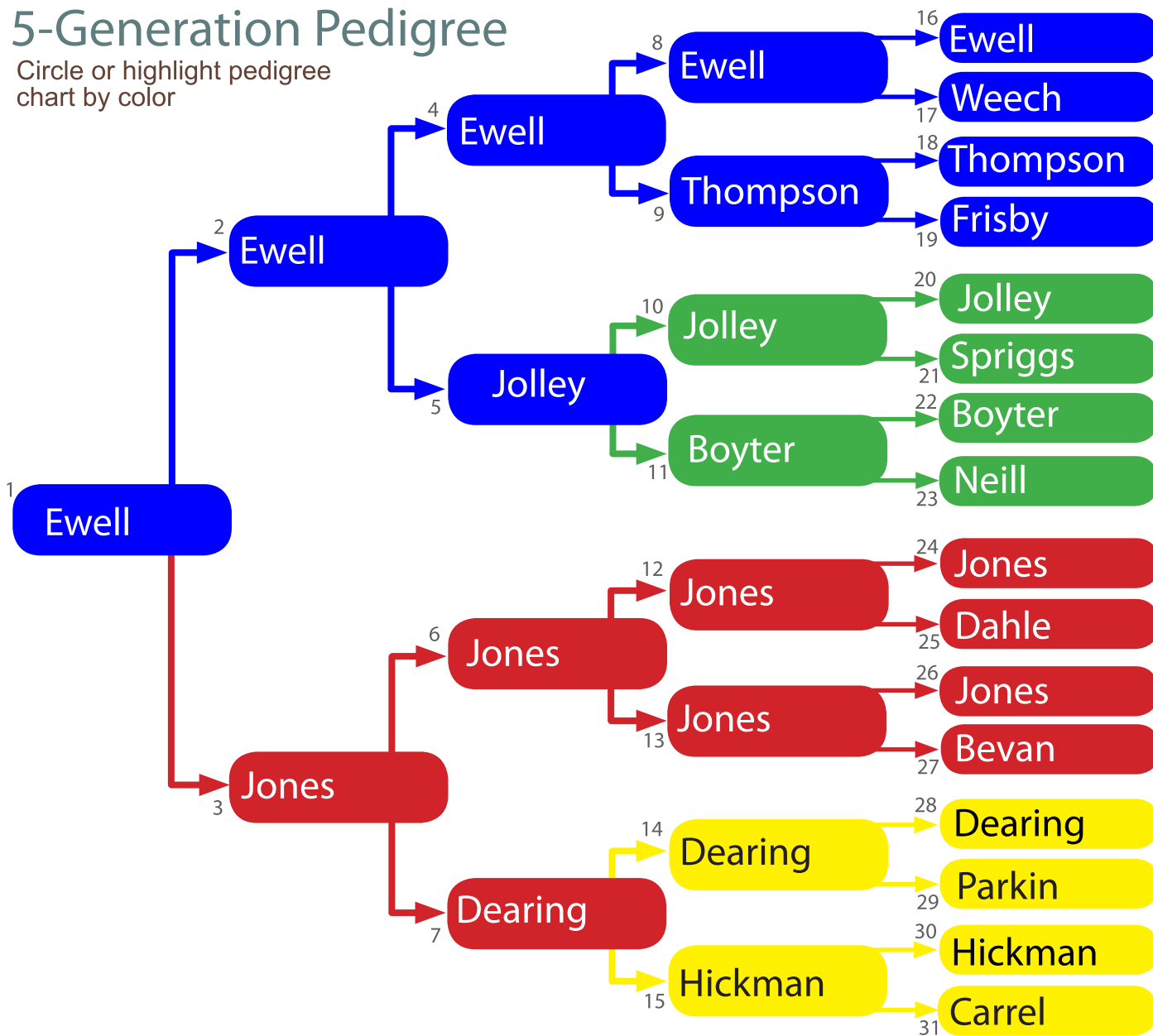
Figure 3

Patronymics

The same basic filing system can also be used for families that did not have fixed surnames, however it requires some additional considerations. The example described here is from Scandinavian countries where prior to the period 1860-1900 a child took his father's given name and the suffix -sen/-sson or -datter/-dotter depending on whether it was a boy or girl. Similar patronymic systems were used in the Netherlands, Slavic Countries, and northern Germany. They can be handled differently. Patronymic systems used in Latin American countries may required a different organization.

Instead of using a surname to organize your family files, for countries with patronymics you will need to use the name of the farm or village where the family lived. As Scandinavian and European societies were based on a feudal system and most people were farmers, the place where the family was living becomes very critical in identifying and distinguishing the family from others with the same names. In Norway and parts of Sweden and Finland, every farm had a name. Larger farming districts also had names. Not every farm in Denmark and some parts of Sweden had a name, however the village or farming community had a name.

As property was generally stayed in the same family from one generation to another, you can use the place name and family name as identifiers in the place of the surname.

Color Coding

The color coding system is used to distinguish different branches of your family. Just as you can distinguish your four grandparent's lineages using four colors, you can also identify each of your Scandinavian lineages with a different color. If you have two Danish ancestors and one Swedish ancestor who all came to America from different parts of Denmark and Sweden, you should use a separate color for each line. This will help you keep the three lines distinct and keep you from getting them confused. Mark each file according to the color of the emigrant ancestor whose lineage it belongs to.

The filing system will then have a file with pedigree charts at the first showing the ancestry of the emigrant ancestor. It will then have general information and records about Denmark, about the county where the emigrant was from, the parish where the family was from, and the farm where the family was from. These general and locality based files will have a tab in the center of the file, so they can easily be distinguished from the family files which will have tab labels on the left or right side. The farm file might include copies of census records that list all those living on a farm or in a village for different

census years. The county file might have extracts from records that include more information than just one farm.

Behind the file with information from the farm will be a file for each generation of the family listed from latest generation back to the earliest generation. For example, your first ancestor from Denmark was Iver Bendtsen, born 1822, from the Skårup farm, his file will be listed first. The files for his father Bendt Knudsen (born 1802) and grandfather Knud Madsen (born 1769) raised their families on the Skårup farm will be listed next.

In some cases the property may have been inherited from a mother's line rather than from the father's line, in which case the father would be from another farm. The mother's line will then be followed under that farm and the father's lineage will be listed under the farm where his family was from. In this example, Knud Madsen's wife Kirsten Bendtsdatter was born on the Skårup farm, so her father's file (Bendt Nielsen, born 1725) will be listed next. Knud Madsen was born in the village of Højmark in Lem Parish. After all the direct line ancestors from the Skårup farm have been filed, a place file for Lem Parish and one for Højmark village will be next with a center tab. Then the file for Mads Andersen will be the next file.

The pedigree chart at the beginning file will be a key to the system and pedigree charts showing the ancestors who extend back in each locality should be included in the locality files. You should have one copy of this pedigree chart with the farm where the family is filed listed next to the male ancestor's name and highlighted. This will make it easy to find a particular ancestor's file.

This example is shown in the following diagram with the files (each square represents a file folder) at the front of the filing box at the bottom of the diagram:

(Color coding red for all the files for the ancestors of Iver Bendtsen)

MyGenShareQuickHelps
Find ancestors faster

Anders   Højmark
Højmark (unknown)   c. 1695

Mads Andersen   Højmark
Else Knudsdatter   c. 1727

Knud Madsen   Skårup
Kirsten Bendtsdatter   1769

Højmark Village

Bendt Knudsen   Skårup
Ane Kirstine Iversdatter 1802

Lem Parish

Iver Bendtsen   Skårup
Johanna Marie Christensd. 1825

[Includes all documents, biogra-
phies, photographs, and other
family history materials about this
family]

Bendt Nielsen   Skårup
Karen Jensdatter   1725

Description of Folders

The left and right tabs can both be used
for family files. The purpose is to distin-
guish the place files from the family files
by having the place files in the middle. If
you are researching families other than
direct ancestors (collateral lines), you
could put all the direct line ancestors in
left tab files and all non-direct lineages
in right tabbed files.

The information listed on the tab in-
cludes the name of the husband and
wife on the left and the farm where the
family lived and the husband's year of
birth. If you have not color coded the
files, you might also include an abbrevia-
tion to indicate this is the ancestry of
Iver Bendtsen. If a family lived at more
than one farm during their married and
later life, try to find the place where they
lived for the most time or where the ma-
jority of the children were born and file
the family under that farm.

Skårup Village

[Includes copies of pedigree
charts showing the direct line
ancestors who lived on this farm
and extracts of census and other
documents that include all those
living in this village]

Hanning Parish

[Contains maps, historical infor-
mation, and extracts of records]

Ringkøbing County

[several parishes in this county]

General Denmark File

[Contains general information
about Denmark, handwriting
guide, word lists, and pedigree
charts showing the ancestry of
Iver Bendtsen]

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