



January 2009 Organization Checklist

It's a new year, AGAIN. (Already?) Did you accomplish what you wished to accomplish LAST YEAR, genealogically speaking? Maybe some of you are in the same boat I'm in? There are a lot of "should-have-dones" on my list. Let's not let those old, unfulfilled promises to ourselves keep us befuddled. We CAN get organized; it is just a matter of putting our collective minds to the task. Let's GET GOING!

Back by popular demand, Ol' Myrt here has provided this simple checklist of things to accomplish each month. By the end of the year, we SHOULD have just about everything of a family history nature organized. The kitchen, laundry and yard work will go to pot -- but then, who's perfect?



Figure 1 - Is this how your computer desk looks?

WEEK ONE: 1-3 January 2009



Ok, this is a short week, with New Years Day to celebrate, so Ol' Myrt here will cut you some slack, and will make things easier for you.

Clear off the computer desk and make piles for everything. This one DEFINITELY bears repeating each year, as those papers manage to pile up. Then we move things over to make room for more photocopies, that new scanner, and then, ouch! What a mess things get into.

Make FOUR basic categories:

- ☞ To Be Filed
- ☞ Letters/Email to Write
- ☞ Research to Do
- ☞ Photos - for now put all the photos in a box, we'll tackle them later.

Check your office supplies, and replace any missing or lost items, so you will have all necessary tools close at hand. Friday and Saturday you'll find time to shop as necessary. Here are some suggestions: pencils, pens, those neat, cheap flash drives, acid free top-loading sheet protectors, insertable 3-ring binders, oversize divider tabs, toner or ink jet cartridges, paper for printer, file folders & hanging file folders.

When Ol' Myrt calls for "insertable" binders, she means the "view" binders that have clear plastic on the cover and spine, so you may insert a printed page to label the contents.

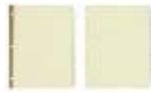
I first ordered a dozen 1 inch binders in white. Now my goal is to transfer everything to larger d-ring binders, in black.

Why black? Well, in just the last 18 years since I first set up the binders, the white ones have begun to show the dirt.

*This is month #1
of your life
as an
ORGANIZED
genealogist.*

(No giggling now!)

So, while my newbie DearREADERS are getting their original notebooks in order, Ol' Myrt here will be replacing her old ones with heavy duty, black, D-ring binders. As you can see from this quickly gathered listing below, the heavier the covers and the larger the D-ring size, the more costly the binder. Ol' Myrt here thinks the 3inch binders are too heavy, once you get printouts of every family group sheet, along with accompanying photos, certificates and other supporting documents. If a notebook needs to be split into two, that is much easier in the lifting department for old grandmotherly hands like mine.

<p>Economy Binders</p>	 <p>UNV20952 - Round Ring Economy Vinyl View Binder, 99 cents each</p>	 <p>Round Ring Economy Vinyl View Binder, 1 Capacity, White,12/Count \$12.49</p>
<p>Mid-range Binders</p>	 <p>Avery(R) Flexi-View Binder, 1" Ring, Black, \$1.49 each</p>	 <p>Acco-Wilson Jones(R) Standard Round-Ring View Binder, 1 1/2" Ring, White \$2.82 each</p>
<p>Luxury Binders</p>	 <p>Avery(R) Heavy-Duty EZD Locking D-Ring View Binder, 2in. Ring, Black \$7.49</p>	 <p>Avery Nonstick Heavy-Duty EZD Reference View 2 Inch Black Binder \$11.49 <i>(too rich for my blood.)</i></p>
<p>Essential Oversized Divider Tabs</p>	 <p>Oversized Insertable Tab Indexes, Clear Reinforced, White, 8 Multicolor Tabs \$2.04 for a set of 8</p>	 <p>SPR21981 Oversize Ring Binder Indexes, 8-Tabs, 11x9-1/4, Clear, 56 cents for a set</p>

Be sure to obtain "oversized" divider tabs, made specifically for 3-ring binders where sheet protectors are used to hold documents and photos. Since the sheet protectors stick out about 1/2 inch more than a typical printed page, the regular-width dividers will get buried and it will be harder to navigate through your family history notebook.

Setup the computer desk the Way you really want it!

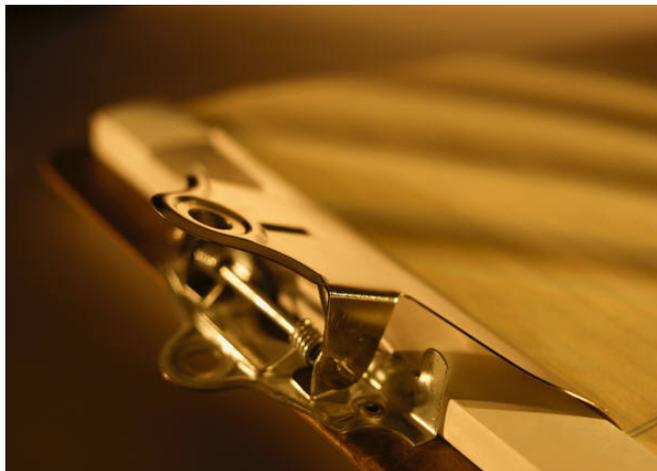
Get that new mouse pad with matching wrist rest, a copy stand that hooks on your monitor, and the special lamp you've always wanted. Fix the wobbly chair leg or get a new ergonomically-designed desk chair. We want to be as comfortable as possible at the keyboard! We're going to be typing in lots of notes for each ancestor as the year progresses. This might be the time to spend your Christmas gift card on a new armoire-style computer desk. The only thing Ol' Myrt would add is corkboard on the inside of the doors to post reminders and a calendar.



Figure 2 Armoire shown available at www.Staples.com

Designate a special golden clipboard as the "WHEN HELP ARRIVES" clipboard. Spray paint it if you need to, just do whatever you can to make it EASY to spot this no matter how deep it gets buried on your computer desk.

Scribble notes on paper and stick them on this clipboard whenever you run into computer problems. This will save time the next time your computer nerd friend stops by to fix the problem!



Drop Ol' Myrt here a line via email Myrt@DearMYRTLE.com if you really get stuck! If I can't help, I can probably find someone online with just the info you need.



BRIGHT IDEA

Use a hanging file box to "quick store" documents you've just collected on a recent trip to a library or archive but haven't yet found the time yet to scan and transcribe into notes in your genealogy management program for each person referenced on the document.



Ol' Myrt orders much through Amazon.com, and has found with the price of gasoline, and time away from research, it PAYS to order through "Amazon Prime", a reduced-fee shipping plan.

Items usually arrive within 2-4 days, not counting the weekend.

Ol' Myrt particularly wishes you to obtain a portable hanging file folder box, with room for a file for each letter of the alphabet.

This will make your life so much easier in the future.

My Salt Lake Study Group members who come visit my new house on the 25th will see how I use this portable file as a "quick fix" as soon as I get home from a research trip. Since I live in the greater Salt Lake City area, that usually means the world-famous [Family History Library](#).

If you are viewing this in .pdf or online format, you merely click to order this inexpensive [Rubbermaid version](#) and order it safely through Amazon.com for \$13.88.

WEEK TWO: 4-10 January 2009

This week we're really going to get into developing a filing system.

- Create a SURNAME NOTEBOOK** for each major surname. You can combine some surnames now, and divide them up when one grows too big. Ol' Myrt here prefers notebooks to file folders for permanent filing, because the pages won't fall out. Mine are labeled on the spine, since they are file on my bookshelves like this:

A to Cromwell

Daines

Daniel through Ferguson

Fry through Gill

Gist

Gist, Christopher - Part 1

Gist, Christopher - Part 2

Goering

Goering, Frances Irene (my grandmother)

Originally, Ol' Myrt here started out with 2 surname notebooks:

A-M

N-Z

The notebooks quickly got crowded, so I would break one out into two notebooks as my research progressed and more proof documents were collected on one family name than another.

Some notebooks have five or six surnames in them, others surnames extend over three or four notebooks. It just depends on how much in the way of documentation I happen to collect.

The fact that I am working on 260+ surnames, and have about 75 surname notebooks shouldn't throw ya. I've been working at this for more than a few decades.

- Put all DIRECT LINE family group sheets in chronological order** (youngest to oldest) in each notebook, with a divider tab clearly labeled "DIRECT LINE". This means the parents, grandparents, great grandparents, and NOT their brothers and

sisters. It doesn't matter if the pages are handwritten, or printed out from your genealogy management program. Let's just get this organized into one place and go from there. So here's what we'd find in my maiden name's PLAYER FAMILY NOTEBOOK:

Family Group Sheet (where I am a child in my parent's family)

Family Group Sheet (where my dad is the child in his parent's family.)

Family Group Sheet (where my dad's dad is a child in his parent's family.)

Eventually we'll interfile photos and documents relating to each family group sheet between them. Those documents concerning my childhood are in the PLAYER FAMILY NOTEBOOK. This would include photos of me as a child, my birth certificate, and my various graduation certificates prior to marriage.

Anything about me after the marriage to Marc Smith would be filed in the SMITH FAMILY NOTEBOOK following the family group sheet where I appear as the wife of Marc Smith. Naturally, my wedding portrait and marriage certificate would also be filed there. So would birth certificates of my daughters and their childhood photos, school report cards and such. Once each daughter is married, she is added to a family group sheet where she is the spouse, and this together with photos and documents are filed in that daughter's married name family notebook.

Put all COLLATERAL LINE family group sheets in chronological order in the same notebook, with a divider tab clearly labeled "COLLATERAL LINES". This means the siblings of your direct ancestors, such as your siblings, parent's brothers and sisters, and so forth. Believe me, if things get difficult later, sometimes it is the brother or sister of an ancestor who has left good genealogy info to his/her descendants.

File RESEARCH papers on any suspected ancestors and families in the same surname notebook, but clearly label the divider tab clearly labeled: RESEARCH (not proven). Ol' Myrt just hates to be in the middle of research, and not know what to do with other people with the same surname in the same area as my ancestors, particularly if it is a small town where there just weren't that many residents.

If Ol' Myrt doesn't label these folks "NOT PROVEN" then my children who take up the research will think these odd ducks really do belong in the family. It is merely that we haven't proven the relationship with enough documentation.

WEEK THREE: 11-17 January 2009

This week we're really going to get into developing a filing system.

- Buy tons of top loading sheet protectors** in archival quality. They are available in boxes of 100 for about \$8 at Wal-Mart, Sam's Club, Staples and Office Depot, or you can order them from [Myrt's Amazon store](#) as well.
- Take a deep breath.**
- Actually place all important documents in page protectors.** This includes everything in your "TO BE FILED" pile created during the first week of this month's checklist.

Now for the hard part - file everything away in the notebooks for each family surname. You may have to make a copy or two of some documents, such as a marriage record that lists both the husband by his last name, and the wife by her maiden name. The first copy gets filed in the husband's surname notebook, behind the family group sheet where he is the husband in the family. The second copy gets filed in the wife's maiden name notebook, thereby pointing the reader to the husband's notebook for all post-marital documentation and photos.

**BRIGHT IDEA**

I don't use a numbering system. WHY? Some people prefer to file their documents away as document 1001, 1002 and 1003, or census 1001, census 1002, census 1003. One man's document #1001 is another's document #4509.

Consider that if I used a document numbering system it would only work when someone is using my personal collection of genealogy. Furthermore, the numbering system more than likely works only IF I am there to explain where everything is kept. Most visitors to my family history/computer room are NOT genealogists and have no idea what documents to expect to find.

If Ol' Myrt here were to print out a family group sheet with reference to

CENSUS #1004, it means nothing to the reader I will send it to. He may have used a different numbering system. Your census record #1004 is most certainly not going to be the same as census record #1004 in Ol' Myrt's files.

So let's use the "coffee table" approach to these family history notebooks. Instead of Audubon's *Birds of America*, any of your family history notebooks could be placed on your coffee table, and prove just as interesting. All photos and documents supporting the information on a family group sheet would be filed in the notebook, and not some in the census file drawer, and others in the marriage records file folder, etc.



Figure 3 Coffee table from www.ikea.com

I learned this sad lesson when my brother David came to visit back in 1990. He was a truck driver for American Van Lines at the time. I thought he'd like to go out to dinner at the beach where I lived at the time. Instead he asked me to make pork chops with mushroom soup gravy (like mom made) and he wanted to see what genealogy I had collected lately. I had to pull photos from the albums in the bookcase, and look for the recently acquired US Union Civil War Pension in the third draw of my lateral file cabinet. It occurred to me that IF I WASN'T THERE TO PULL THINGS FROM HERE AND THERE, it would have been impossible for my brother to learn about his ancestors using my collected works. They were just not readable.

Our SURNAME NOTEBOOKS will then read like a coffee table book. Related documents must be right there in the surname notebook with the appropriate family group sheet, so it is easy to read.

Having it all together also makes it easier to scan or photocopy and forward to a newly found cousin. Believe me this concept rang true when I had to photocopy 460 pages to send to my new Froman cousin in Texas in 1993! Because I was using the "coffee table" approach to genealogy, I only had to work through consecutive pages in my notebooks. No jumping around for me! I merely took the two notebooks to

the copy store. No more picking through the numbered filing system file drawers to locate for all documents for my Froman family. Can you imagine having to refile them again?

When I got home, I just put the two notebooks back on the shelf. No need to refile 460 different documents!

WEEK FOUR: 18-24 January 2009



Now did you REALLY think Ol' Myrt here was only going to let you have one week to file everything you've collected thus far in your ancestral quest?

- Finish up the filing project started in week three.



BRIGHT IDEA

Ol' Myrt here prefers to put copies of the wedding certificate right after the family group sheet where the couple is listed as the husband and wife in the family. That way, each family history notebook makes for great reading, with proof documents and all. Everything is there, and I don't have to go hopping all over to get every document, photo and diary photocopies on an individual to show my grandson when he visits.

WEEK FIVE: 25-31 January 2009



Now to branch out a bit, we're going to do some online indexing and have a little fun.

Volunteer at FamilySearchIndexing.org. You've probably heard about this massive project where over a million names are indexed each week. This is a way for you to pay your dues – genealogically speaking. It is amazing what we can accomplish together. Here is a screen shot of what it looks like to index a page from the census. Do not worry. There are two people who index each page, and an arbitrator that resolves any discrepancies.

It only takes a few minutes to sign up as a volunteer and download the software. You may then select from a variety of indexing projects, in multiple language formats as show in the screen shot I took today:

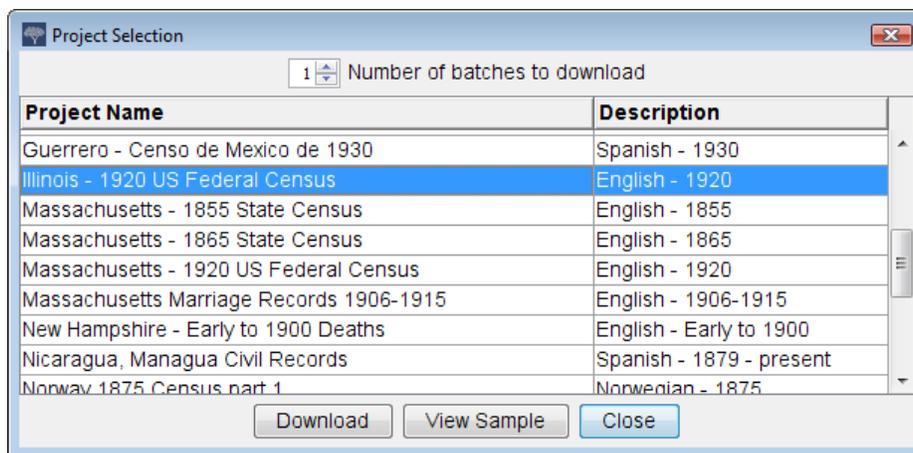


Figure 4 Project selection screen from www.FamilySearchIndexing.org

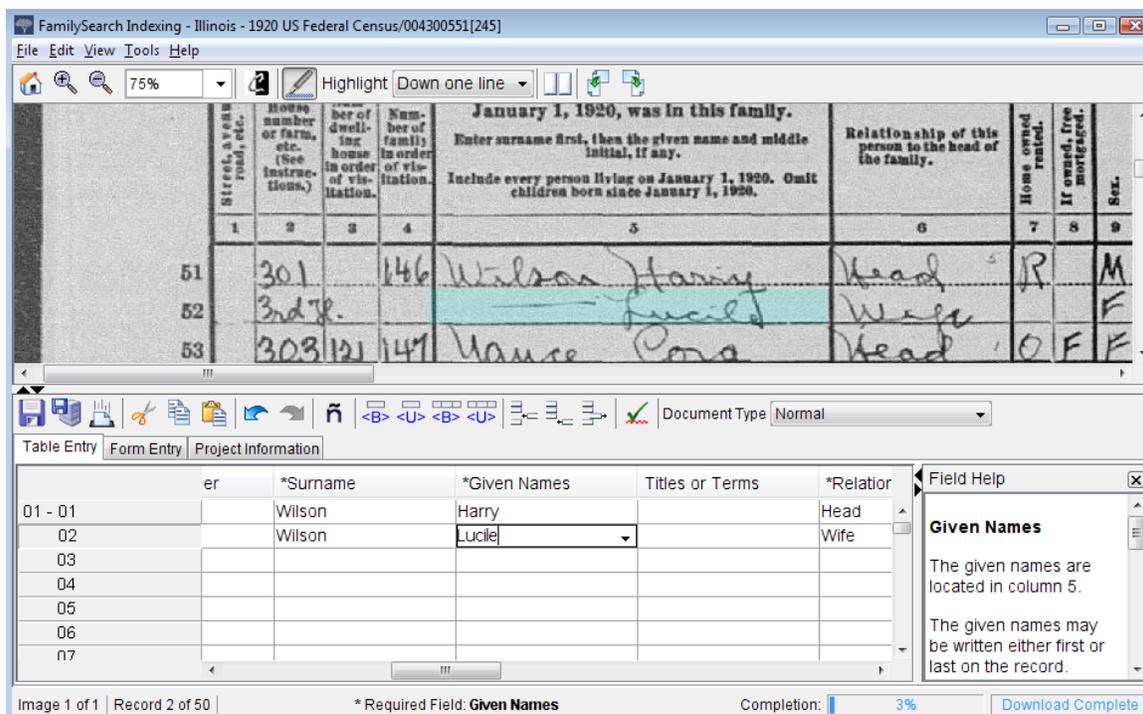


Figure 5 Sample indexing screen.

Learn to use at least 3 new genealogy websites to search for each of your major surnames. That's right, spend the next seven days and "major" in online research. These might include:

www.FamilySearch.org free mega pedigree database site, 1880 US & 1881 UK and Canada Census Indexes Click SEARCH, and type in an ancestor's name. You should spend hours here searching for each of your surnames. Check back again every three months to see what's been added.

<http://pilot.FamilySearch.org> is the location of the impressive FamilySearch scanning project and the results of the FamilySearchIndexing.org

<http://rootsweb.ancestry.com> Yes, Ol' Myrt knows, these used to be at RootsWeb.com, but that was then, this is now. Be sure to look at

[RootsWeb Surname List/RSL](#) (Surname Listings)

[MetaSearch](#) (Multiple Databases and Files)

[Social Security Death Index](#) (Deaths)

[U. S. Town/County Database](#) (Locations)

[WorldConnect Project](#) (Family Trees)

[Index of All Search Engines and Databases](#)

Mailing Lists

Be sure to look not just for surnames, but for localities and ethnic groups associated with an ancestor. You are hoping to find a researcher who has experience and can tell you more about surviving records, even if they aren't a distant cousin on a specific family line.

[Index](#) (Browse All Lists)

[Find a List Search](#)

[Surname List Finder](#)

Message Boards

Some of the mailing lists automatically cross-post to the message boards and vice versa, depending on what the volunteer administrators specified under "settings" for that board.

[Message Boards Home Page](#)

[Localities](#)

[Surnames](#)

[Topics](#)

[My Alerts](#) You can have the message board software send you a notice if there is a new posting on a particular search item you specify.

- www.Google.com When you search for an ancestor by name here, you'll find all sorts of websites listed. Try "Smith family" and "Smith genealogy" substituting your ancestor's last name in place of Smith.

Some database websites require a fee to see the results whether in index or scanned image format. Look for a public library, archive or LDS Family History Center that may have free access to these sites, if you don't already subscribe.

- www.Ancestry.com Although there are some free databases, you will really find membership here useful, even if for a month each year. Fortunately you can do a

“global search” type in your ancestor’s name and let Ancestry’s computer search all databases at once before deciding to join. See also US federal census images online.

- www.Footnote.com has been collecting massive amounts of scanned images from the National Archives (US). It is possible to print and save documents, in addition to spotlighting them on the site so that others will find the source documents you’ve found.
- www.GenealogyBank.com has perhaps the largest single collection of historic newspapers, in addition to the most complete SSDI Social Security Death Index online.
- HeritageQuest Online, sold only to libraries, not individuals. Your public library may have access, or you may elect to join a society that allows you to remotely access HQO so you can do this research in the comfort of your home.

Ol’ Myrt here has restrained herself when it comes to mentioning website for your review. Where once there were merely 10-15 good sites, now there are many for each ethnic group and region of the world.

You’ll discover that such websites are GOOD way to determine whether or not your ancestors’ names, dates & relationships have already been documented by another researcher. BETTER yet, an index will lead you to a record group you hadn’t previously considered. It is BEST when the index links to the scanned image of the original document mentioning your ancestor.

SUMMARY – January 2009



Congratulate yourself on all you accomplished this month! Wish we could all go out to dinner and celebrate. You’ve gained the personal satisfaction of knowing you’re really going to accomplish your goal this year to FINALLY GET ORGANIZED!

At least now, you can see the top of your computer desk!