

# FamilyRoots Organizer System

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## INTRODUCTION

Genealogy is fun when you can find things, but frustrating when you can't. You need a simple system for organizing pedigree charts, family group records, documents, notes and research tools so that you can quickly find them again. The following 4 steps help you begin to organize your family records and documents.

**Step 1.** Gather together items you already have that give genealogy information.

**Step 2.** Fill in a pedigree chart with yourself, your parents, and grandparents.

**Step 3.** Divide up the items you found by the 4 family surnames of your 4 grandparents.

**Step 4.** Begin to build your pedigree charts and make family group records.

## SETTING UP THE FILING SYSTEM

**Step 1. Gather supplies for your filing system.**

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 with colored plastic tabs, in colors blue, green, red and yellow. Choose the 1/5 cut, which works best with this system.
Hanging files - standard green	Hanging files, letter-size with clear plastic tabs, 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 <u>ultra fine point</u> , 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 <u>permanent</u> adhesive on the back.
Dots	Dots colored blue, green, red and yellow.
Large wall-size pedigree chart	Large pedigree chart helps you to see clearly your family lines (optional). <a href="http://www.123genealogy.com">www.123genealogy.com</a>

**Step 2. At the front of your file box put pedigree charts of your lineage.**

**Step 3. Study the Circled 5-Generation Pedigree Chart.**

See on FamilySearch at: <http://tiny.cc/lvwww> Organizing Your Paper Files Using File Folders –

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

**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.



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

**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 chart in its surname hanging file. Repeat the process for each of the 16 surnames.

**Step 8. Label a manila file folder for each family on your 5-generation pedigree chart.**

Print or write a family group record for each of the families on your 5-generation pedigree chart. Label with just surnames, given name, date of birth and m2 if a second marriage for one of them.

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

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

Put new colored hanging folders behind the surname hanging file that holds the highlighted 5-generation pedigree chart. Place the manila family folders in the newly added hanging folder.

- Group the manila family folders by color and then by surname - all the "red" Smith's together, all the "yellow" Jones families together.
- Then arrange the family folders in alphabetical order by the husband's first name.
- When the surname changes every generation, as it does for Scandinavian, Asian, American Indian and Polynesian families, file the families by location and by birth date. See <http://familyrootsorganizer.com> - TIPS - Patronymics for more helps.

### **Step 10. A family folder holds the following items.**

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, 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.

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, if you prefer.

### **How do I file children of a family other than my direct-line ancestor?**

Using center-tab manila folders, create a file for each nondirect-line child, as the parent of a family. File these center-tab manila folders behind the direct line parent's folder.

- Use center-tabbed manila folders for collateral line (aunts and uncles) families.
- They are not a part of the alphabetical filing system, but are filed right behind their parents, in birth date order of the related children (not the birth date of the spouse).
- Put a colored dot in the upper right hand corner of the family group records of nondirect-line children to quickly see they are nondirect-line. The color of the dot should be the same as the color of the parent's line.

### **Step 11. Set up other useful files.**

#### ***1. Surname Holding Files***

- Set up Surname Holding Files to store documents as the need arises.
- Place the Surname Holding File right behind the surname hanging file with the pedigree charts, and before the family files. Do this for any family where you see the need.
- Be sure to go back and use the documents stored in the Holding Files! Photographs should be stored in archival quality holders in 3-ring binders for long-term preservation.

#### ***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 local map, a list of marriages from a town or county 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, with a source reference and notes taken from the documents filed in your Locality File. Add Locality Files as you need them. You can 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 Locality files in the second file box you purchased.

### **3. Help Files**

Set up Help Files as needed for tools such as foreign 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!

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

##### **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." File at least one item a day into your basic filing system.

#### **How to Add New Surnames**

A website gives you three generations of Sarah Harris's ancestors with good documentation. You want to add these new families to your filing system. These people 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.
2. Add highlighted pedigree charts to the folders to see how these people are related to you.
3. Make family group sheet for Sarah Harris as a child with her father, Jacob Harris
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.

#### **BIBLIOGRAPHY OF SOURCES**

[www.familyrootsorganizer.com](http://www.familyrootsorganizer.com) – instructions for setting up the organize system

<http://www.123genealogy.com> circle color pedigree chart 877-263-2267 toll free.

[www.familyrootsorganizer.com](http://www.familyrootsorganizer.com) Horlacher, Gary, *Patronymics*, under TIPS.

<http://www.legacyfamilytree.com> Legacy 7.5 Prints colored family groups and pedigree charts in the Mary Hill Color Coding System.

<http://tiny.cc/lvwww> - "Organizing Your Paper Files Using File Folders" on FamilySearch.org

Legacy 7.5 Help System:

- Mary Hill Color-Coding System
- Color Coding of Ancestors
- Reports – Family Group Records – Color Text and Boxes
- Reports – Pedigree – Color Text and Boxes