



January 2011 Organization Checklist

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 organized of a family history nature.

(Right) The kitchen, laundry and yard work will go to pot -- but then, who's perfect?

If your year was anything like Ol' Myrt's, then health, travel, and family issues challenged your ability to accomplish all you had hoped in the organization department last year.

But we CAN get organized. For Ol' Myrt, it is just a matter of putting my shoulder to the wheel, and pushing along!

This year's organization checklists will include some new concepts:

- Using 'Dropbox' for seamless online backup and file sharing.
- Participation in a monthly "scanfest".
- Uploading your database to Ancestry.com's trees (for quick retrieval of possible scanned image matches.)
- Creating a blog to "get the word out" and/or as a research workspace for info you're collecting before you've proved a individual is an ancestor that belongs in your genealogy management program.

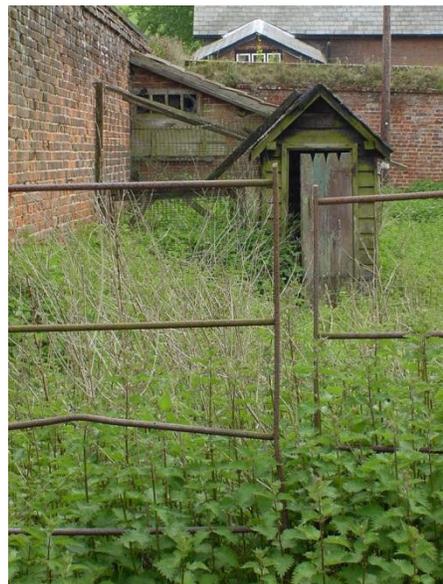


Figure 1 Photo courtesy of [Jean Thornhill](#), used by permission.

- Finding online how-to research assistance.
- Learning more about wikis.
- Attending a live webinar.

WEEK ONE: 1-8 January 2009



OK, take a deep breath on New Years Day and celebrate the fact that Ol' Myrt here is giving you 2 Saturdays to get things done this week.

Backup your genealogy data. Once you set this up, you won't have to worry about doing a regular backup, as the free software will do this for you automatically. I prefer using Dropbox, a method for storing your data in the Dropbox folder on your computer that is nearly simultaneously replicated in your Dropbox folder on the internet, as long as you are connected to the internet. See: [DearMYRTLE's Beginning Genealogy Lesson #3 Modifying Dropbox for Genealogists](#). This lesson has screen shots of my personal genealogy folder, with sub-folders for major surnames.

Here are the simple steps to getting Dropbox to do your backup work for you TODAY.

1. Go to www.DropBox.com and set up an account. It works on Windows, Mac, Linux and mobile operating systems. When you first visit the site, take the time to view the orientation video, as it describes the use of the service quite well. Ol' Myrt here is sure you'll find the Dropbox service indispensable, even if you aren't planning a trip to Africa.
2. Download the installation file (It is only about 12MB).
3. Double click on the file to install it.
4. Create a "genealogy data" subfolder in your new Dropbox folder (usually found under "documents" or "mydocuments").
5. Move your genealogy database file to the Dropbox folder.
6. Change the file location settings of your genealogy program to point to the new Dropbox location.

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

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. In Ol' Myrt's case, I've got three shelves in my office with photos piled high on each one. Some are newly acquired antiques, some are from my Dad's collection of our childhood pics. Others are the new fangled oversized postcard-type wedding invitations with photos of the couple.

Check your office supplies, and replace any missing or lost items, so you will have all necessary tools close at hand. 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, and I ended up with dividers for 273 surnames. Some surnames take up two or three binders. Other surnames fit in a binder with five or six others where I haven't collected as many documents. Now my goal is to transfer everything to larger d-ring binders, in black. Why black? Well, in just the last 21 years since I first set up the binders, the white ones have begun to show the dirt.

So, while my newbie DearREADERS are getting their original binders 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 3-inch binders are too heavy, once you get printouts of every family group sheet, along with accompanying photos, certificates and other supporting documents. If a binder 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 (too rich for my blood.)</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 binder. Using the "oversized divider tabs" like those made by Wilson Jones. Items WLJ55206 and WLJ55209 have clear tabs, items WLJ55205 and WLJ55208 have multi-colored tabs. If you read this while connected to the internet, you'll be taken right to Amazon.com where you may order these oversized divider tabs.

Setup the computer desk the way you really want it!

Every year I publish this list, I am sure to include this option. We tend to fix things for everyone else, and limp along with a makeshift setup for ourselves. But no more!

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



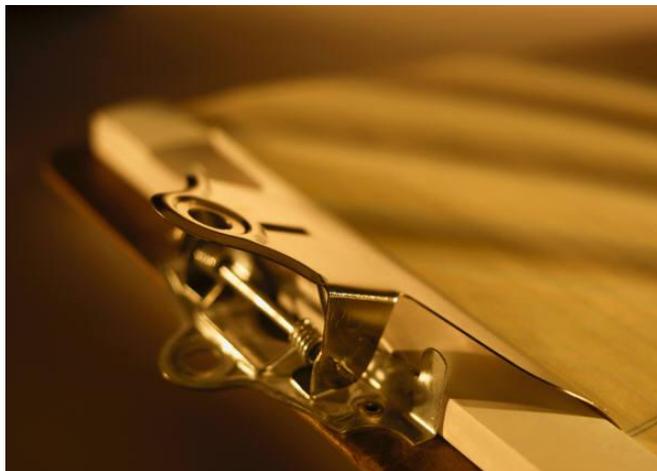
Figure 2 Armoire shown available at Staples.com

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.

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!





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 recommends you to obtain a portable hanging file folder box, with room for a file for each letter of the alphabet.



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.

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

My Salt Lake Study Group members who came to visit my new house a few years back, saw how Ol' Myrt uses 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: 9-15 January 2011



This week we're really going to get into developing a paper filing system using binders and sheet protectors. Next week we'll begin dealing with digital file folders.

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.

Create a SURNAME BINDER for each major surname. You can combine some surnames now, and divide them up when one grows too big. Ol' Myrt here prefers binders 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 binders: **A-M** and **N-Z**

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

Some binders have five or six surnames in them, others surnames extend over three or four binders. It just depends on how much in the way of documentation I have collected. You can break a surname out into its own binder, making sure

The fact that I am working on 273 surnames, and have about 116 surname binders 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 binder, 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. It doesn't matter if your family group sheets are

So here's what we'd find in my maiden name's PLAYER FAMILY BINDER:

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 BINDER. 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 BINDER 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 binder.

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 binders for each family surname.

It doesn't matter if your family group sheets are hand written or printed from your genealogy program. They are an easy way to "see your family" in context and to make quick written notes about what to do next.

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 binder, behind the family group sheet where he is the husband in the family. The second copy gets filed in the wife's maiden name binder, thereby pointing the reader to the husband's binder for all post-marital documentation and photos.

Put all **COLLATERAL LINE** family group sheets in **chronological order** in the appropriate surname binder, 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 binder, 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 forgets to 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 may be that these folks just have similar names, or it may be that we have not determined the relationship with enough documentation.



BRIGHT IDEA

I don't use a numbering system. **WHY?** Some people prefer to file their documents (paper and digital) 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.

WEEK THREE: 16-22 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 two.



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 binder 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.

COFFEE TABLE APPROACH

So let's use the "coffee table" approach to these family history binders. Instead of Audubon's *Birds of America*, any of your family history binders 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 binder, and not some

in the census file drawer, and others in the marriage records file folder, etc.



Figure 3 Coffee table from 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 near Bradenton, Florida 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 nearly impossible for my brother to learn about his ancestors using my collected works.

Our SURNAME BINDERS will then read like a coffee table book. Related documents are filed be right there in the surname binder with the appropriate family group sheet, so the genealogy is easy to read, even for a novice family historian like my brother David.

Having a family's "source" documents all together also makes it easier to scan 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 binders. No jumping around for me! I merely took the two binders 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 binders back on the shelf. No need to refile 460 different documents!

Once we get everything scanned, the process of sharing will be even simpler!

WEEK FOUR: 23-29 January 2011



This week we begin developing a digital filing system.

It's time to finally get your scanner working, and then create folders on your hard drive to accept the documents you'll be scanning at something wonderful called a "Scanfest" on January 30th next Sunday.

Since you've got your collected documents filed with family group sheets, you now have an idea of the major surnames in your genealogy.

Hook up your scanner and make sure you know how it works. Check your scanner's manufacturer website, as frequently they have .PDF copies of manuals posted online for people like you and me who misplace things like directions. Figure out specifically how your scanning can be changed to:

- **Rename the images.** We don't need them called scan0001, scan0002 as generically assigned by your scanner.)
- **Adjust the image quality to at least 300dpi** (dots per inch)
- **Change the file location.** We don't want the scanned images placed in your photos folder, but in the appropriate surname folders of your Dropbox genealogy folder.

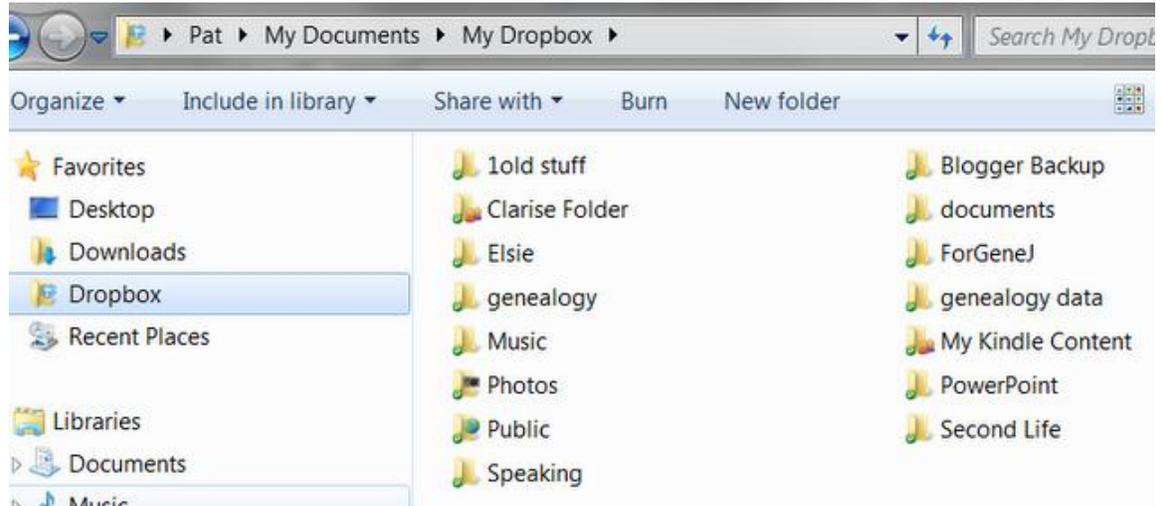
Take a deep breath.

Create a sub-folder in your Dropbox genealogy folder for each major surname in your genealogy database. Here's how things look in Ol' Myrt's Dropbox folder.

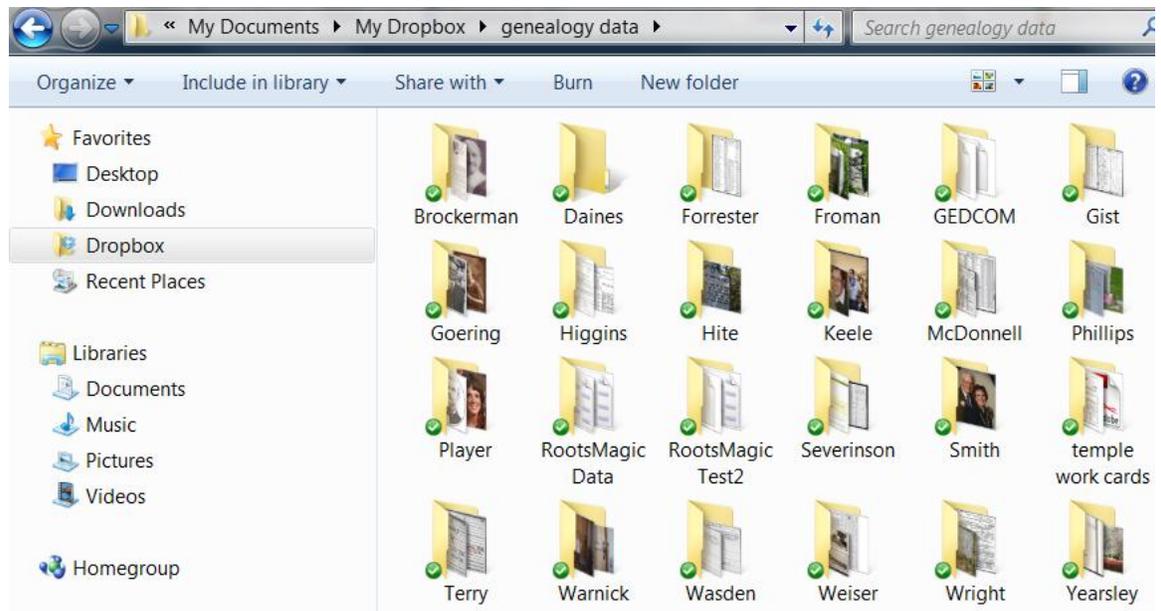
This is month #1
in your life
as an
Organized
Genealogist!

*No giggling
now!*

Dropbox folder



"Genealogy Data" a sub-folder of my "Genealogy" folder in Dropbox. The green check mark means the folder has been synchronized with the online copy of my Dropbox folder.



WEEK FIVE: 30-31 January 2011



Now to branch out a bit, we're going to join in in the monthly "Scanfest" hosted by Miriam Robbins Midkiff.

Sunday, 20 January 2011 attend Scanfest, and get a good 3 hours of scanning done, while also attending a chat with all sorts of tips and tricks shared by other genealogists participating in the Scanfest.

Hostess Ms. Miriam says "Scanfest is generally held the last Sunday of each month from 11 AM to 2 PM, Pacific Time. In the past, I have made adjustments for holidays such as Memorial Day weekend, Thanksgiving, and Christmas/New Years. My schedule is as follows:

- January 30
- February 27
- March 27
- April 24
- May 22 (one week early due to Memorial Day weekend)
- June 26
- July 31
- August 28
- September 25
- October 30
- November 27 (tentative - will be put to a vote during October's Scanfest)
- December 18 (tentative - will be put to a vote during October's or November's Scanfest; one week early if scheduled, because of Christmas Day)."

In addition to scanning for 3 hours, participants can come to an online chat room at Miriam's blog at any time between 11 AM and 2 PM, Pacific Time. You'll find her at AnceStories: The Stories of My Ancestors at <http://ancestories1.blogspot.com>.

Miriam explains "The top post will contain the CoverItLive chat forum for Scanfest. At the bottom of the CoverItLive screen, there will be a place for participants to add their chat comment and their name. This is NOT the same as commenting on the blog post itself."

"It's a lot easier than it sounds, and the nice thing is that you can go back and re-read what happened during Scanfest, especially if you missed some or all of it that month. We do a lot of sharing on great genealogy resources and websites as well as preservation and scanning tips. And we just plain get silly and have a lot of fun. Sometimes we even get some scanning done! ;-) It's so much better than actually sitting and scanning for hours at a time by yourself (yawn!). I'm always excited to have new people join us, and I hope you do as well! We'd love to have you!"

Miriam tells Ol' Myrt she sends out a detailed reminder about a week before the Scanfest, so be sure to follow Miriam's blog.

SUMMARY – January 2011



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!