



Organizing folders and files on PC for Genealogy – by : Lynn Baker

“You Are the One Responsible”

Goal: to make any file or image findable and easy to work with

Organize and Filenames

- Be descriptive
- Don't be generic
- Be Consistent
- Use an appropriate Length
- Do what makes sense to you
- Do what can be understood by others

Set up filing system on computer. Keep it simple. Duplicate the filing system across all systems. (paper, backup Hard files, Evernote, bookmarks, et.)

The default folders often found in Windows or Mac environments:

File Explorer or Windows Explorer

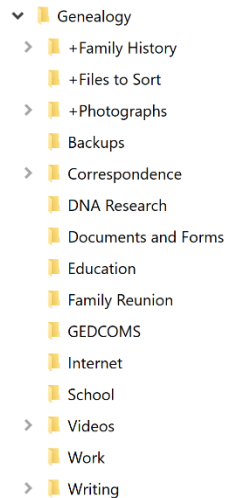
- Documents
- My Documents
- Downloads
- Desktop
- This PC or (C:) Drive
- Default folders for certain software programs
- Folders for cloud storage
- Any folders you created yourself

Finder (Mac)

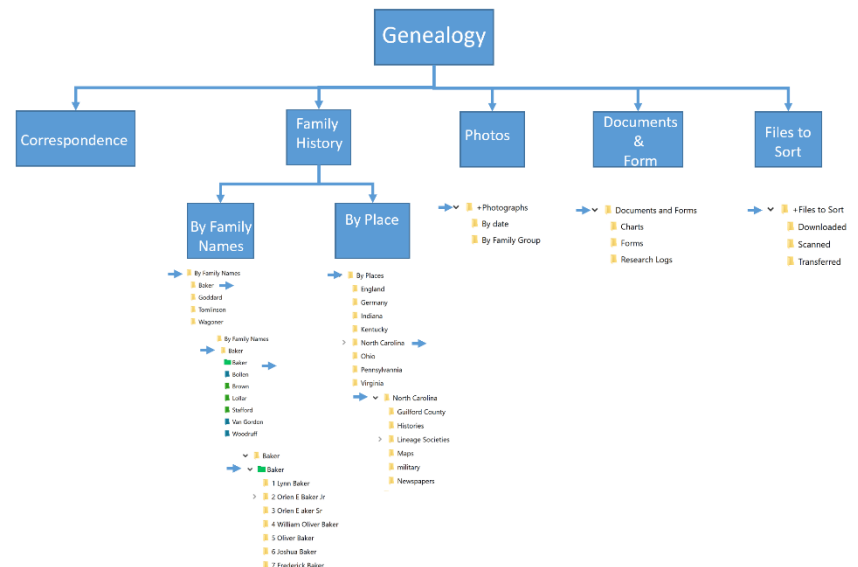
- All My Files
- Desktop
- Documents
- Downloads
- Default folders for certain software programs
- Folders for cloud storage
- Any folders you created yourself

Organize – Directory / Folder Structure

Image of example (+ brings folder to top)



Example Hierarchy digital Folder System





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File Naming

- Your file naming patterns might differ as you go from record type to record type or project to project. Choose what works best for you under those circumstances.
- Include as much as you can in the name of the file in order to: Identify at a glance what the file contains
- Be able to track down the original later if necessary
- Items to include in file names:
 - Year and/or date
 - Record type
 - Names
 - Locations
 - Title of record
 - Repository
- Choose the order that makes most sense to you for your project. Prefer date first for timeline
- Surnames in all UPPERCASE letters stand out
- Hyphens, spaces, commas, underscores, and some uppercase letters help make the file name easier to read. With newer Windows and Apple, this is no longer necessary
- Characters you cannot use in file names
 - < less than angle bracket
 - > greater than angle bracket
 - : colon
 - " quotation mark
 - / forward slash
 - \ backslash
 - | vertical bar or pipe
 - ? question mark
 - * asterisk
- 256/6 character limit (Windows path include in length, MAC, path not included) Some programs have troubles with long names. To be safe we should be aware of that limit and use our characters wisely.
- Standardized formats:
 - dates: YYYY-MM-DD or YYYYMMDD (2019-03-01)
 - City, County, State, Country
 - Use Maiden names
- Use descriptive Text

Examples: Pick a system that works for you and stay with it

Photos (research and scan)

- BAKER-Orlen 1950 Tucson Pima Arizona first house.jpg
- 1950 Orlen BAKER first house Tucson Pima Arizona.jpg

Image master file

- BakerOE 010.tif

New Photos:

- Year-subject

7 November 2022

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- 2010_Lynn BAKER bday-01.jpg

1940 BAKER, Orlen Land Patent, Delaware Co, Indiana, Receipt 13541.pdf

1930 US Census Orlen, Delaware, Indiana_Orlen BAKER page_216_(MyHeritage).pdf

1981_OrlenBakerDeathCert.jpg

2022-09-01_Baker_Tomlinson Family Stories.mp4

1830 BAKER, Orlen Indiana Land Records, 1630-1950 DelawareDeeds 1829-1831 vol I-K Image166 (FamilySearch).jpg

BAKER_Orlen_1940_Land_Patent_Muncie_Delaware_Indiana_Receipt_13541.pdf

1941 Letter from Nila BAKER.pdf

1942 Fold3_Selective_Service_Registration_Cards_World_War_II_Winfred WAGONR front.jpg

1930 US Census Delaware, Indiana Orlen BAKER page 216 (myheritage)

SURNAME-firstname_yyyymmdd_state-place_item

BAKER, Orlen, 1940 Land Patent, Delaware Co, Indiana, Receipt 13541.pdf

Create your own Abbreviations:

- FS = FamilySearch
- Anc = Ancestry
- My = MyHeritage
- IN = Indiana
- ENG = England

Create a cheat sheet for your system – a guide you can continue to use.

Rules when saving a photo or screen shot:

1. Photos - Rename file to something short and simple, put in appropriate folder for person
2. Documents / Record – Rename for book, volume, page and file correct folder
3. File now, rename later

Use Shortcuts (Windows) or Aliases (MAC) to link files and folders to cross reference other files without copying them.



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File Formats

- Moving images: MOV, MPEG, AVI, MP4
- Sounds: WAV, AIFF, MP3
- Still Images: TIFF, JPEG, PNG, GIF
- Tabular data: CVS, TSV
- Text: XML, PDF/A, HTML, ASCII TXT

Overall System Approach:

Use a pedigree chart as the outline, and family group sheets as the model for folders within.

1. Surname folders.
2. Inside those, one folder for each of my direct-line male ancestors and their spouses. They are numbered to put them in generational order. Started with Great Grandparents – 5 generations back. OR start with yourself and build back as you go.
3. Inside those, one folder for each of their children as I begin researching them.
4. Inside the child folder that is for my direct-line ancestor, I put a shortcut that points up a level to the designated direct-line folder above.
5. Inside the folders are the records/sources, photos, reports, and files for that couple.
6. Inside the folders are sub-folders if I need them for Reports, GEDCOMs, Photographs, etc.
7. A woman's files are in her father's folder until marriage, then in her husband's folder after that. If you have divorces or unmarried partners then you need to develop an approach to deal with it.
8. A second relationship that isn't my direct-line is in its own folder within that person's folder.
9. I have some location-based folders for research in certain areas that are general and not specific to an ancestor.

Set up a naming pattern to use in your file names – Pick a system that works for you.

How to get started:

1. Gather your information, take stock of where everything is on your computer
2. Decide where you want to put everything – Directory on your computer or external device (cloud, SSD..)
3. Decide on a filing system and try a small version to start with. Work on one surname or one couple at a time.
4. Make time to work on it once a week

Where do I file if many people in the photograph? Put it in the oldest person's folder, maybe shortcuts into direct line



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Screenshots of system:

- ▼ Genealogy
 - ▼ +Family History
 - > +Files to Sort
 - > +Photographs
 - Backups
 - > Correspondence
 - DNA Research
 - > Documents and Forms
 - Education
 - Family Reunion
 - GEDCOMS
 - Internet
 - School
 - > Videos
 - Work
 - > Writing

- ▼ Genealogy
 - ▼ +Family History
 - ▼ By Family Names
 - > Baker
 - > Goddard
 - > Tomlinson
 - > Wagoner
 - ▼ By Places
 - England
 - Germany
 - Indiana
 - Kentucky
 - > North Carolina
 - Ohio
 - Pennsylvania
 - Virginia

- ▼ Wagoner
 - > Ammerman
 - > Bowers
 - > Clouse
 - > Darr
 - > Myers
 - > Ruffner
 - ▼ Wagoner
 - 1 Glossie Lavonne Wagoner
 - ▼ 2 Winfred E Wagoner
 - +1 son George Wagoner
 - +2 daughter Glossie Wagoner
 - +3 son Winfred Wagoner J
 - Census Records
 - Military
 - Occupation
 - Will
 - 3 William Alfred Wagoner
 - 4 John Andrew Wagoner

- ▼ Wagoner
 - 1 Glossie Lavonne Wagoner
 - ▼ 2 Winfred E Wagoner
 - +1 son George Wagoner
 - +2 daughter Glossie Wagoner
 - +3 son Winfred Wagoner J
 - Census Records
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 - 3 William Alfred Wagoner
 - 4 John Andrew Wagoner
- ▼ By Places
 - England

- +1 son George Wagoner
- +2 daughter Glossie Wagoner
- +3 son Winfred Wagoner J
- Census Records
- Military
- Occupation
- Will
- 1889 WAGONER WE Birth Cert.jpg
- 1914 WAGONER WE Marr Cert.jpg
- 1917 WAGONER WE WWI Registration.jpg
- 1944 WAGONER wWE 408 house.jpg
- 1948 Winfred E WAGONER Gravestone FindAGrave.jpg
- 1948 Winfred E WAGONER Photo Ball State Business Controller.jpg
- 1948 Winfred WAGONER The Muncie Star Press death 8 Jun 1948 p4 col4 part 2.pdf
- 1948 Winfred WAGONER Death Cert Indiana Reg 17580 (Ancestry).jpg



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References

Color your Windows folders:

- Sordum Folder Paint: <https://www.sordum.org/10124/folder-painter-v1-3/>

Color your Mac folders:

How to Change Mac Folder Color | Monterey macOS (2022), <https://www.youtube.com/watch?v=-S325hvZnRs>

Sources:

(1) Mastering Digital Filing For Genealogists – Cyndi Ingle