



Getting It Right

Starting your Genealogical Journey

Part 2 - Keeping Organised



Office furniture. K E Niven and Co :Commercial negatives.

Ref: 1/2-210128-F. Alexander Turnbull Library, Wellington, New Zealand. [/records/22735355](https://records/22735355)

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This is part 2 of a 4 part series "Starting Your Genealogical Journey". These notes should be read in conjunction with the accompanying video which you can find on the [NZSG website](#).

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Early computers. K E Niven and Co : Commercial negatives. Ref: 1/2-240391-F. Alexander Turnbull Library, Wellington, New Zealand. [/records/22498904](#)

Portrait of a dancer with fan; William Berry; photography studio; circa 1920; Wellington B.047068
[collections.tepapa.govt.nz/object/380802](#)



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Keeping organised

Keeping yourself organised is all about being able to find the records you already have when you need them. If you can't find them, you might waste time looking, or worse, spend money to buy another copy! It may also save you from making a mistake.

Everyone has a different way of keeping themselves organised - one person's messy desk is another's intricate filing system. There is a lot of advice on the internet, but you may like to use a filing system that you've used in the past if you find it works best for you.

Ultimately, it needs to work for you. Try out the advice on the internet, but if it doesn't work, try something else.

Paper vs Digital

You will be more organised if you have one set of records either on paper or on your computer (digital). These days digital wins because it takes up less space and it's easier to back up.

Some terminology

Records management and information technology use the same terms but they have different meanings. In the context of genealogical records:

A file is a document which can be a spreadsheet, image, pdf etc.

A folder is where files/documents are stored. It is possible to have folders within folders within folders.

File names

Things to consider:

- Folder (and subfolder) structure
both online and offline
- File names
Needs to include:
Name, event, date, place
- Which folder you will use for married women?



Be Consistent

You don't have to figure it all out before you start, but the longer you take to sort out your filing system, the more records you will have to rearrange.

Backing up - the 3-2-1 Rule

3

Keep at least **three** copies of your data
That includes the original copy and at least two backups.

2

Keep the backed-up data on **two** different storage types
The chances of having two failures of the same storage type are much better than for two completely different types of storage. Therefore, if you have data stored on an your computer's hard drive, make sure you have a secondary storage type, such as external hard drive or removable storage like a USB stick, or the cloud.

1

Keep at least **one** copy of the data offsite
Even if you have two copies on two separate storage types but both are stored in your home, a fire or tsunami could wipe out both of them. Keep a third copy in an offsite location, like the cloud or with a trusted family member or friend.

Further guidance on preserving your digital records can be found at:

- [Archives New Zealand](#)
- [The US Library of Congress](#)



Computer software

Specialised genealogical computer software (aka family tree program) is a great way to store the details of your family tree. It can help make sense of the tangled web family trees sometimes are!

In this technological era, there are a huge variety of options of family tree programs. Some are offline programs that are stored on your own computer(s). Others are online where your information is stored on a provider's website. These online trees can be private or available to anyone who is looking.

When starting out, find offline software that you find easy to work with. Once you have done some research, you can then put all or part of your research on an online family tree in order to attract other cousins.

Online

Online trees are stored on the internet (aka the Cloud) so they can be accessed from anywhere with internet access (and only when there is internet access).

Here are some articles which list some of them:

www.familytreemagazine.com/article/best-genealogy-sharing-websites-2016

www.familytreemagazine.com/article/10-storing-sharing-web-sites

Do note that most are commercial operations and will want a subscription at some point.

You could also consider a blog - google 'free blog' to find one.

Check sources examples of citations

Note: all content on the internet can be taken without contacting you or getting permission



Offline

Offline family trees programs are more than just a way to record family information. They can provide research tools and ways of sharing your research such as charts and reports.

There are many options out there. Look for one that best suits your working style.

en.wikipedia.org/wiki/Comparison_of_genealogy_software

Scroll across this list to see operating system compatibility including Mac OS compatible. Many people use Windows emulators to run Windows programs on their Mac.

If you want to view your family tree on your Android device, you will need a Gedcom reader (see below about Gedcoms). Have a look in the Play Store. There are also Gedcom readers that work on iPhones. Have a look in the Apple Store.

familytreewebinars.com/index.php - Legacy Webinars and help (for both the program and genealogy in general)

Gedcom

Genealogical Data Communication file - allows data to be transferred across platforms and programs. Note, it will link to media files but it does not contain your media files.

en.wikipedia.org/wiki/GEDCOM

A gedcom will allow you to:

- move information between family tree software programs
- upload and download information to/from online family trees
- swap information with relatives



Gedcoms are created by your family tree software. Look for "Export" to create one and "Import" to open one in your software.



Web safety

Doing genealogy online is no different to anything else online. If it looks too good to be true, it probably is.

www.netsafe.org.nz/ Netsafe is New Zealand's independent, non-profit online safety organisation. It has lots of information about staying safe online including current scams.



Privacy

If you don't want it out there, please don't put it out there. Any information that leaves your computer is no longer under your control.

This includes when you send it to family members. You don't know what they might do with it!

Summary

- Keeping yourself organised will save you time, money and stop you making mistakes.
- Find an organising system that works the way you do.
- Be consistent!
- Computer software can be a great tool to help keep yourself organised.
- Genealogy on the internet is no different to anything else on the internet - stay safe!
- Control of your privacy is down to you.



Glossary

Terms used in this presentation:

The Cloud - where you store computer data over the internet on someone else's computer

Digital - anything on your computer

File - a document which can be a word doc, spreadsheet, image, pdf etc.

Folder - where files/documents are stored. It is possible to have folders within folders within folders.

Media files - files which contain genealogical records. These can be in any format but are usually images (such as .jpg, .gif or .png) or .pdf files.

Offline - without the use of the internet

Online - on the internet

Software - the programs and other operating information used by a computer

Where to next?

You have completed Part 2 of the *Starting Your Genealogical Journey* series of Getting It Right. Part 3 covers [Searching](#)

Getting It Right:

- Starting Your Genealogical Journey

1. Where to Start
2. **Keeping Organised (includes Computer Software)**
3. Searching
4. New Zealand Sources

- Effective Research

- Sharing Your Family History

