

OPERATION GRANNY FILES

Research Legacy Planner

Make sure the work survives you.

Workbook & Planner

Mission 30: Building a Legacy — Preserving, Sharing & Publishing

Clearance Level: Biscuit-Tin Operative

operationgrannyfiles.substack.com

QUICK-GRAB SUMMARY

You have spent months, maybe years, gathering names, dates, documents, and stories that would otherwise have been lost. This planner makes sure that work survives you. It walks you through where your files actually live, how to back them up properly, how to name and organize them so anyone can find what they need, how to hand off access if something happens to you, how to choose a way to share your research with the world, and how to do all of that ethically. Fill it in over an afternoon. Update it once a year. Keep a printed copy with your other important papers.

Where Everything Lives

Every family historian eventually accumulates a private map of their own research — which program holds the master tree, which drive has the backups, which login opens which account. That map usually exists only in your head. Write it down. If you are unavailable for even a few weeks, the person trying to help you (or continue your work) needs this information in one place, in plain language.

Fill in the table below and keep it current.

Item	Details
Master tree file name & location	
Software used (e.g., RootsMagic, Family Tree Maker, Legacy)	
Primary backup location (device)	
Secondary backup location (cloud)	
Password manager used (name only — never the password)	
GEDCOM export location	
Date of last GEDCOM export	

A brief word on GEDCOM. GEDCOM (GEnealogical Data COMmunication) is the universal, portable file format for family tree data. The current standard is GEDCOM 7.0. Nearly every genealogy program — free or paid, old or new — can open a GEDCOM file, which makes it the closest thing genealogy has to an insurance policy. If your specific software disappears, gets discontinued, or simply stops working on a future computer, a current GEDCOM export means your tree itself is not lost, even if the program that built it is gone. Export a fresh GEDCOM file every time you make significant additions to your tree, and note the date each time in the table above.

The 3-2-1 Backup Checklist

Family history research is irreplaceable in a way most files are not. A lost tax return is an inconvenience. A lost family tree, built from years of courthouse visits, archive requests, and interviews with elderly relatives, often cannot be rebuilt at all. Professional archivists rely on a simple standard for exactly this reason: the 3-2-1 rule.

- ☐ **Three copies total** — your working file plus at least two backups (the original counts as one of the three).
- ☐ **Two different media types** — for example, your computer's hard drive and an external drive, not two copies sitting on the same type of device.
- ☐ **One copy off-site** — a cloud backup service (Backblaze, Google Drive, Dropbox, or similar) or a copy stored at a different physical location, so a house fire, flood, or theft cannot take out every copy at once.

Use the space below to record your own setup:

Copy	Media Type	Where It Lives	Last Verified
Copy 1 (working file)			
Copy 2			
Copy 3 (off-site)			

Recurring reminder. Backups fail quietly — the file corrupts, the drive dies, the cloud sync silently stops — and you often will not notice until you need the backup and it is not there. Tie a verification check to a date you will not forget: your birthday, New Year's Day, or the anniversary of when you started this research. Write your chosen date here: _____. On that date each year, confirm all three copies open correctly and contain your latest work.

A note on scan formats. When you digitize an original document or photograph, save the archival master scan as a TIFF file — an uncompressed format built for long-term preservation, not everyday viewing. For anything you want a reader to be able to open decades from now without hunting for special software, save or export a PDF/A version. PDF/A is a restricted version of PDF designed specifically for long-term archiving; it embeds everything needed to display the document correctly regardless of what software exists in the future.

GRANNY PRO TIP

Set a recurring calendar reminder for your chosen backup-verification date right now, before you close this document. A backup you have never tested is a hope, not a plan.

Folder & File Naming Cheat Sheet

A consistent naming system is what makes a research collection usable by someone other than you — including a future version of yourself who has forgotten the details of a search from three years ago.

The pattern: `YYYY-MM-DD\_RecordType\_Surname\_Place`

Example: `1920-04-12\_Census\_Maxfield\_EmerCoUT`

This single pattern tells you, at a glance and without opening the file, what the record is, whose family it concerns, where it originated, and when it was created or recorded — sorted chronologically the moment you view the folder alphabetically.

Do:

- **Use letters, numbers, hyphens, and underscores only** — these characters are safe across every operating system and every cloud service.
- **Lead with the date** in YYYY-MM-DD order so files sort chronologically by default.
- **Keep record types consistent** — pick one term (Census, VitalRecord, Deed, Probate, Photo) and use it the same way every time.

Don't:

- **Don't use spaces** — replace them with underscores.
- **Don't use parentheses, ampersands, slashes, or other special characters** — some cloud sync tools and older software mishandle them, and they can silently break links or search indexing.
- **Don't rely on version words like "final" or "new"** — use the date instead; it never lies.

Example folder tree:

```
Genealogy/
├── Maxfield_Family/
│   ├── Census/
│   │   └── 1920-04-12_Census_Maxfield_EmerCoUT.pdf
│   ├── Vital_Records/
│   │   └── 1888-06-03_Birth_Maxfield_EmerCoUT.pdf
│   └── Photos/
│       └── 1945-08-10_Photo_Maxfield_Family.tif
├── Larsen_Family/
│   ├── Census/
│   ├── Vital_Records/
│   └── Photos/
└── GEDCOM_Exports/
    └── 2026-07-01_FullTree_Export.ged
```

Build your own tree the same way: one top-level "Genealogy" folder, subfolders by surname or family line, and within each, subfolders by record type or place. Mimic the pattern above with your own family names and it will scale cleanly no matter how large your collection grows.

The "If I'm Gone Tomorrow" Page

This is the single most important page in this entire planner.

Every other section in this document makes your research easier to use. This section makes sure your research survives you at all. Genealogists spend years building something of real value to their descendants, and that work is lost more often than it should be — not because the research was bad, but because nobody else knew where it was, what it was, or that it mattered. Fill this page in completely. Print it. Keep it with your will, your insurance papers, or wherever you keep the documents you trust someone else to find when it counts.

Fill in the blanks:

My master family tree file is named _____ and is kept in _____, using the software _____.

My most current backup copies are located at:

1. _____
2. _____
3. _____

The following person(s) know how to access my research and its backups:

My password manager (if any) is: _____. (Do not write the password here — only the name of the manager and, separately and securely, how to reach it.)

The following person(s) have expressed interest in continuing this research:

If no one has yet, note who might reasonably be approached: _____

Any final instructions about what you want done with this research (donate to a historical society, keep it in the family, publish it, combine it with a specific relative's files):

Date this page was last updated: _____

BONUS INSIGHT

Update this page every time you update your will or other estate documents. A stale "If I'm Gone Tomorrow" page pointing to a backup location you abandoned two years ago is worse than no page at all, because it gives false confidence. Treat it as a living document, not a one-time exercise.

Publishing Options Comparison

Once your research reaches a point worth sharing, you have real choices about how and with whom to share it. None of these options require you to be a professional writer or publisher — each is designed for exactly the kind of project you have built.

Format	Cost	Best Audience	Effort Required
Print-on-demand book (Lulu, Blurb, DiggyPOD, 48 Hour Books)	Low to moderate upfront (design/layout time); per-copy printing cost, often \$15-\$40/book	Family members who want a physical keepsake to hold and pass down	Moderate to high — requires layout, editing, and cover design, but templates and guided tools exist
Substack or blog	Free to low-cost (some platforms charge a small monthly fee for	Extended family, hobbyist genealogists, and the broader public	Low to moderate — write and publish incrementally, no design

	premium features)	who enjoy following along	or printing required
FamilySearch shared tree	Free	Collaborative — other researchers and family members working on the same family lines, worldwide	Low — enter data directly into the existing collaborative system, no separate publishing step

These are not mutually exclusive. Many researchers use all three for different purposes: a FamilySearch entry so the raw genealogical data is preserved and discoverable by cousins researching the same lines, a Substack or blog to tell the stories behind the data in your own voice, and a printed book as the polished keepsake that sits on a shelf and gets handed down. Pick the one that matches what you want to accomplish first, and add the others later as time allows.

GRANNY PRO TIP

If you are only going to do one thing, put your GEDCOM on FamilySearch's shared tree. It costs nothing, takes an afternoon, and means your research becomes discoverable by relatives you will never meet — including ones not yet born.

Before You Publish — Ethical Sharing Checklist

Sharing family history publicly, or even semi-publicly, carries a responsibility that private research files do not. The dead cannot be harmed by what you publish about them, but the living can be — and so, in a real sense, can those recently lost. Before you publish anything, work through this checklist honestly.

- ☐ Have I gotten permission from living people mentioned by name?
- ☐ Have I redacted anything sensitive about someone still living — age, home address, occupation, or current activities — that they have not agreed to share publicly?
- ☐ Am I sharing DNA information that is not only mine to share? Your results also implicate siblings, cousins, and children who never tested and never consented to having their genetic information inferred or discussed.
- ☐ Have I considered whether any story I am telling could cause real harm or embarrassment to someone still living, even if every fact in it is true?
- ☐ Have I given the people closest to a story the chance to review it before it goes public, where that is practical?

A note on the recently deceased. People who have died within the last several years occupy a gray zone. Their surviving spouse, children, or close friends may still be actively grieving, and details that feel like harmless history to you may feel like an intrusion to them. Extend the same care and the same questions above to the recently deceased for a reasonable period — there is no fixed rule for how long, but err on the side of waiting and asking rather than assuming enough time has passed.

The Letter Page

To whoever finds this.

Somewhere down the line, another person is going to open this file, this box, or this book, and wonder who did all this work — and why. That person may be a grandchild you never met, a cousin doing their own research decades from now, or simply the next person in your family who feels the pull to know where they came from. You know things about this research, and about why it mattered to you, that will not survive anywhere else unless you write them down here.

Use the space below to write a short letter to that future researcher. You might mention what drew you to this work in the first place, which ancestor's story affected you most and why, what you wish you had asked a relative before they were gone, or simply what you hope this research means to the person reading it next.

GRANNY SAYS

"Every name you have found, every date you have confirmed, every story you have rescued from a fading memory — none of it was ever really about the past. It was about making sure the people who come after you would know they came from somewhere, and from someone who cared enough to look. Keep this planner where it can be found. That is the whole of the job now — not to finish the research, because it is never finished, but to make certain it cannot be lost. You have done the hard part already. This is just making sure it lasts."

Notes

Use this space for personal notes and discoveries.
