Building Your Genealogical Skills

Basics 1: Principles of Genealogical Research

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THE BRUE FAMILY **LEARNING CENTER**

American Ancestors.
by New England Historic Genealogical Society

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Course Overview

Part 1 - Basics

B1: Principles of Genealogical Research

B2: Learning About Records

Part 2 - Researching

R1: Planning for Research

R2: How to Research

R3: Organizing for Family Historians

Part 3 - Analyzing

A1: Citations

A2: Critically evaluating your findings

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Module Roadmap

What is Genealogy?
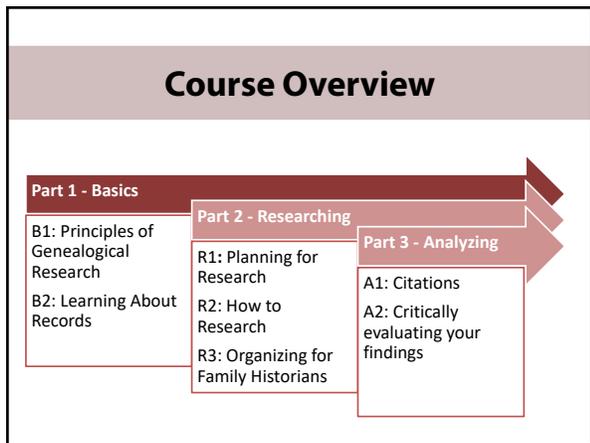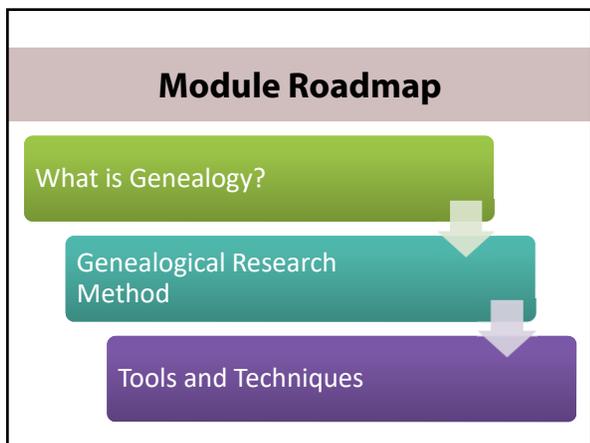
Genealogical Research Method

Tools and Techniques

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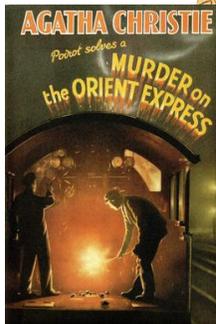## What is Genealogy?

ge·ne·al·o·gy (jēnēˈäləjē)

- Study of our ancestors - our parents, their parents, siblings and so on

- More than names and dates - stories and how our families fit into history

- Stems from ancient Greek
  - *Genea* meaning generation
  - *Logia* meaning telling or discourse or study of

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Why should we study our Family history?

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Detective Work

OR

Jigsaw Puzzle

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Connect to History

- Window into the past – learn about new people and new places
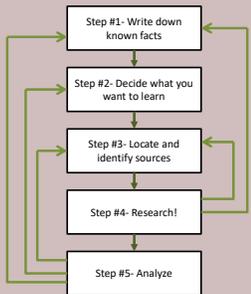- Connect your family story to notable events in history

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Steps for Researching Your Family

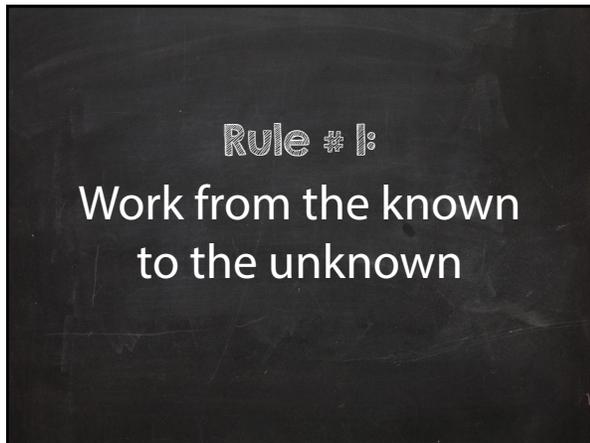| Step 1 | • Identify what you know |
Step 2	• Decide what you want to learn (Research goal)
Step 3	• Identify and locate your sources
Step 4	• Research!
Step 5	• Analyze

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Rinse and Repeat

Step #1- Write down known facts

Step #2- Decide what you want to learn

Step #3- Locate and identify sources

Step #4- Research!

Step #5- Analyze

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Rule # I:

Work from the known to the unknown

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## Step 1: Identify What You Know

- Interview yourself

- Talk to relatives—What do they know? What family stories were they told?

- Record data using a family group sheet, chart, or genealogical software

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Example: Family Interview Questions

- Where did you live when you were growing up?

- How did your family come to live there?

- Were there other family members in the area? What were their name?

- What was your family religion?

- What family stories have you heard about your parents? Your grandparents? More distant relatives?

- What stories have you heard about the European (or other) origins of your family members and their immigration to America?

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Rule # 2:
Write It Down
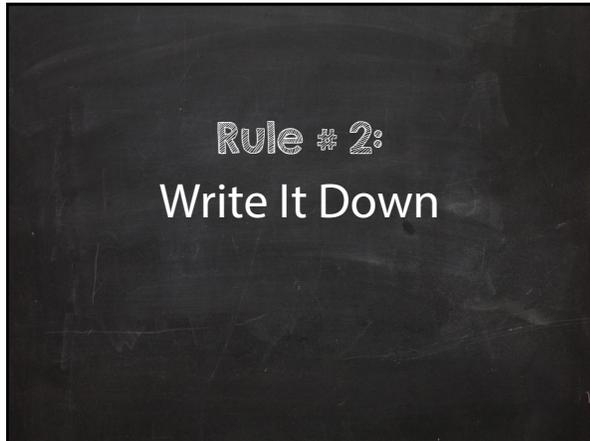
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The Essential Toolkit

- Notebook – paper or Evernote or One Note
- Pedigree chart
- Family Group Sheet
- Research Plan
- Research Log
- Genealogical software program (optional)

Tip
Always Use Pencil!!

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Free Resources from NEHGS

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Register for a FREE Guest account to access forms, templates and other tools to help organize and present your family history research. **More about Guest benefits.**

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- Discounts on research-for-hire, consultations and publications
- Free admission to NEHGS's library including special collections and manuscripts
- Member-only online courses
- NEHGS's weekly e-newsletter *The Weekly Genealogist*

https://www.americanancestors.org

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Toolkit Item #1: Pedigree Chart

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Toolkit Item #2: Family Group Sheet

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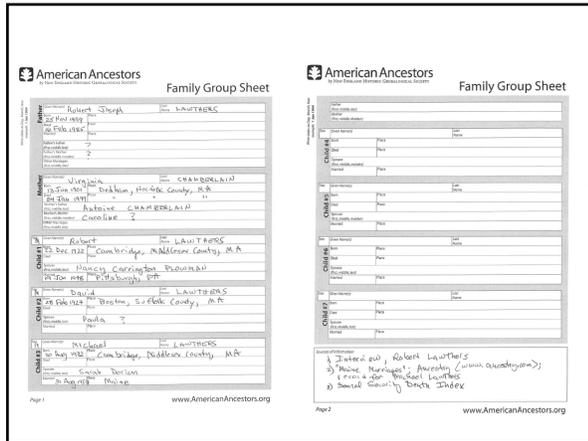
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Record the Information As You Go

- Keep a "working draft"

- Use the forms
  - Tree/pedigree chart
    - Pen/paper
    - Online (AncesTREES, Ancestry.com, FamilySearch.org)
    - Software (FamilyTreeMaker, RootsMagic, Legacy Family Tree)
  - Family group sheet
  - Interview form/family questionnaire
  - Save original images/Documents

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Genealogical Recording Conventions: Names

- Write surnames in all CAPITAL LETTERS

- Record a woman with her maiden name

- When the maiden name is unknown use:
  - [--?--] can be used
  - MNU
  - Just the given name

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Genealogical Recording Conventions: Dates

- Records dates as DD-MMM-YYYY (e.g. 23 MAR 1823)

- DON'T:
  - Use slash marks: 3/12/1823
  - Use a two-digit year: 3/12/23

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Genealogical Recording Conventions: Places

- Note smallest to largest geographic division (e.g. Orleans, Orange County, Indiana)

- For outside the U.S.:
  townland/parish, county, country

- Be sure to identify counties

- Use a consistent style

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Step 2: Decide What You Want to Learn

- Examine the information you have

- What is missing?

- What individuals or families intrigue you the most?

- Create a list of questions or objectives to research

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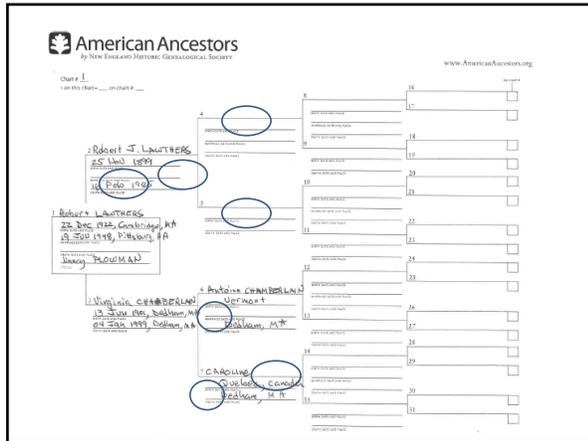
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Typical Genealogical Questions

- Genealogical Data
  - Identity
  - Events
  - Relationships

- For example:
  - Who are the parents?
  - What is the date or place of birth, marriage or death?
  - What is the spouse's name, or maiden name?
  - Who are the siblings?
  - Where did the family come from

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Tip

Start slowly. Don't rush to answer all your questions at once.

Don't skip generations in planning your research; it only leads to misattributed people.

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Toolkit Item #3: **Research Plan**

- Research Plan: A roadmap for research
- Basic Components:
  - Good research question
  - What is already known about the question
  - List of potential records
  - List of repositories

Repositories

What records will help and are they available?

What is already known?

Good research question
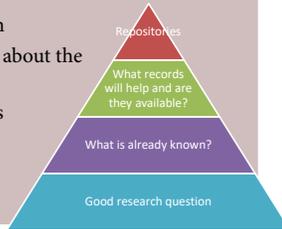
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Tip

Anchor your research to a *X××××i,* a *T××××gi* and a *R××××i*

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Step 3: Identify and Locate Your Sources

- Educate yourself – what types of records will supply the information you need?
- Make a list of records that will aid in your specific research
- Find resources in brick-and-mortar repositories and online repositories
- Map out your plan of action
- Don't forget the "Family Archives!"

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Standard Genealogy Records

- Census
- Vital Records
- Church and Cemetery Records
- Military Records
- Land
- Probate
- Passenger and Immigration Records
- Newspapers
- Counties Histories

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Records

Information Needed	Search These Records First	Then Search These Records
Age	Census, Vital Records, Church Records, Cemeteries	Military Records, Taxation, Bible Records, Town Records, Emigration and Immigration
Birth date and place	Vital Records, Church Records, Census (for place), Town Records	Cemeteries, Bible Records, Newspapers
Marriage date and place	Vital Records, Church Records, Census, Newspapers, Bible Records	Military Records, Probate Records, Naturalization
Death date and place	Vital Records, Church Records, Cemeteries, Probate Records	Newspapers, Bible Records, Military Records, City Directories
Parents' names	Vital Records, Census, Probate Records, Newspapers, Published Genealogies, Local Histories	Emigration and Immigration, Bible Records
Maiden name	Vital Records, Church Records, Newspapers, Bible Records	Cemeteries, Military Records, Probate Records, Town Records

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More Records

Information Needed	Search These Records First	Then Search These Records
Immigration date	Census (year only), Immigration, Naturalization	Newspapers, Biographies
Country of foreign birth	Naturalization Records, Census, Church Records, Vital Records, Emigration and Immigration	Cemeteries, Military Records, Newspapers, Local Histories
Foreign birth location	Vital Records, Emigration and Immigration, Census, Published Genealogies, Local Histories, Naturalization	Newspapers, Church Records, Military Records
Places family has lived	Census, Land, Local Histories, City Directories, Vital Records	Newspapers, Taxation, Military Records, Probate Records

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Use Finding Aids/ Research Guides

- Determine when record-keeping began

- Determine what repositories hold records

- Understand unique record types

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Step 4: Research!

- Begin answering your questions

- General principles
  - Consult multiple sources
  - Gather as many records about a family or individual that you can find
  - Track your work!

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Toolkit Item #4: Research Logs

- Keep track of what you have researched

- Categories of research logs
  - Person
  - Place
  - Family
  - Event
  - Repository
  - General

- What to include on a research log
  - Date of search
  - Source searched
  - Search objective
  - Search string
  - Results of search

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Research Log

Research Log

Repository: _____ Date: _____

Source Information (title, author, publisher, publication date, etc.)	Call Number (film number, URL, etc.)	Objective	Results

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Annotated Research Log – in Excel

Source	Repository	Objective	Time Period	Location	Type of Record	Finding	Notes	Citation
Vital Records								
Census Records								
1880 U.S. Federal Census	FHL	Crotty Family	1880	Eastchester		James, Elizabeth, Marcella, John, James, Jane, Thomas		"1880 U.S. Federal Census," Eastchester, Westchester, New York, population schedule, ED 95, page 25, family 233, household of James Crotty; online image viewed at Ancestry (ancestry.com : viewed 4 Feb 2008), citing NARA microfilm T9, roll 945
1850 U.S. Federal Census	FHL	James Crotty	1850	New York		James, Eliza, Ellen	Ellen is 6 mos old, so she was born Feb 1850	"1850 U.S. Federal Census," New York (Ward 17), New York, Population Schedule, Page 274b, household of James Crotty; online image viewed at Ancestry (ancestry.com : viewed 4 Feb 2008) citing NARA microfilm M432, Roof 556
1860 U.S. Federal Census	FHL	James Crotty	1860	Eastchester		James Eliza, Ellen, John, James, Jane, Mary, Ellen	Ellen the elder is 76 years old, born in Ireland	"1860 U.S. Federal Census," Eastchester, Westchester, New York, Population Schedule, Page 99, household of Jas Crotty; online image viewed at Ancestry (ancestry.com : viewed 4 Feb 2008) citing NARA microfilm M653
1870 U.S. Federal Census	FHL	James Crotty	1870	Eastchester		James, Eliza, Marella, John, James, Jane, Thomas	Mary appears to have died	"1860 U.S. Federal Census," Eastchester, Westchester, New York, Population Schedule, Page 276b, household of James Crotty; online image viewed at Ancestry (ancestry.com : viewed 4 Feb 2008) citing NARA microfilm M593, roll 1114
Cemetery Records								
Probate/Wills								
Newspapers								
Published Genealogies								
City Directories								

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Step 5: Analyze

- Don't just read, examine
  - Does the record bring up new questions?
  - How accurate is the record?
  - How accurate is the source?
- Record the information you have
- Record the sources you use

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Principles of Analysis

- Are you looking at a original or derivative source?
- When was the record created, i.e. how soon after the event it is capturing?
- Who created the record? A participant? Someone else?
- Who provided the information?
- Which information is primary (firsthand knowledge) and which is secondary (secondhand knowledge)
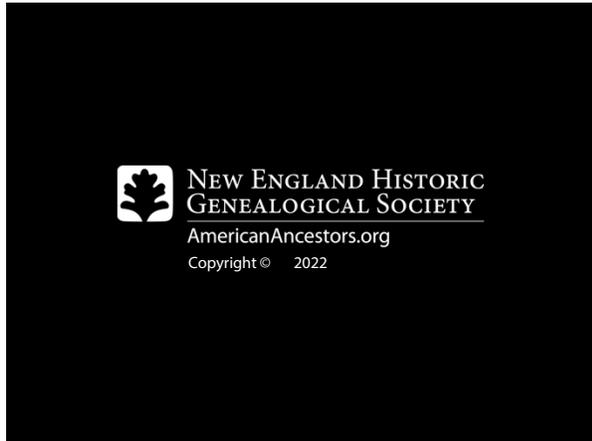- What information do I need to capture for a citation?

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Rinse and Repeat

Step #1- Write down known facts

Step #2- Decide what you want to learn

Step #3- Locate and identify sources

Step #4- Research!

Step #5- Analyze

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Coming Up Next - Module 2
Learning About Records

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