





THE PORTABLE GENEALOGIST
Building a Genealogical Sketch

WRITING TEMPLATES AND SAMPLES

- Sample stylesheet
- Word Processing Programs
- Additional TOC Examples
- Register-style template (.docx)
- Alphabetical template (.docx)
- Using Microsoft Word to Write Your Family History
- Questionnaires for Family
- Family Interview questionnaires
- As long sample (.docx)
- Drop Chart template (.docx)
- List of online image resources
- Editorial checklist
- Proofreader's Marks
- Sample explanations of format
- Publishing checklist
- Publishing help

OTHER RESOURCES

- Subject Guide: Writing & Publishing Your Family History
- Archived Webinar: Ten Steps to Writing & Publishing Your Family History
- Archived Webinar: Writing a Register-Style Sketch
- Guide to Genealogical Writing (not required, but helpful)

How to Write and Publish Your Family History

Voice of Kyle Hurst, Senior Genealogist of the Newbury Street Press

Things to keep in mind -Review-

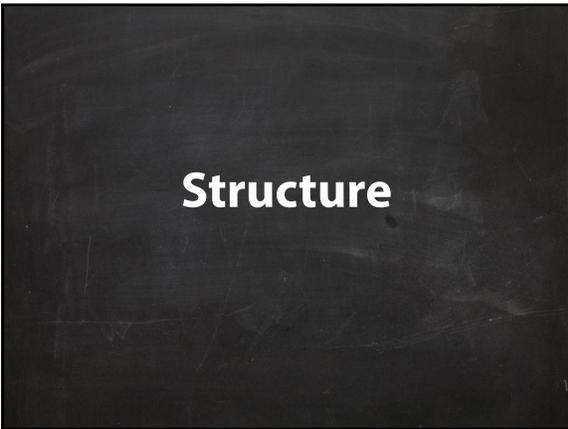
YOUR AUDIENCE

YOUR TABLE OF CONTENTS

SOFTWARE

Things to keep in mind

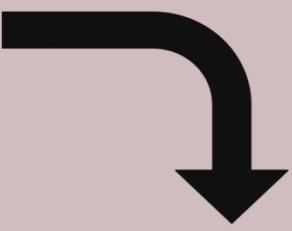
- Consistency
- Clarity
- Reproducibility (via notes and references)
- The long view: think of future researchers



Things to ask yourself

-  What do I want to tell the reader?
-  Who do I plan to write about?
-  How can I best present the information?

Register (descendancy) style

PAST  **PRESENT**



The Register
The Journal of American Genealogy
2020
New England Historic Genealogical Society

Acing Basic Conventions



- Blanks for unknown names:
Mary _____
_____ Doe

- Parentheses around maiden (and previous) married names:
Martha (Dandridge) (Custis) Washington
- Superscript generational numbers, with 1 for the immigrant:
Parent^A Surname
Immigrant^I Surname
Child² Surname
- Full place names initially:
Boston, Suffolk County, Massachusetts

Generational number → ← Lineage line

23. JOHN LOWELL⁸ GARDNER (*Rebecca Russell⁷ Lowell, John⁶⁻⁵, Ebenezer⁴, John³⁻², Percival¹*) was born in Boston, Massachusetts 8 February 1804 and died in Brookline, Massachusetts 24 July 1884.

Birth first, followed by death
Place followed by date

Register-style sketch

Spouse info in same order: name, followed by birth and death, place followed by date

23. JOHN LOWELL⁸ GARDNER (*Rebecca Russell⁷ Lowell, John⁶⁻⁵, Ebenezer⁴*; Marriage info follows birth and death Boston, Massachusetts 8 February 1804 and died in Brookline, Massachusetts 24 July 1884. He married at 134 Essex Street in Salem, Massachusetts 4 October 1826, CATHARINE ELIZABETH PEABODY, who was born in Salem 23 June 1808 and died in Brookline 27 September 1883, daughter of Joseph and Elizabeth (Smith) Peabody. Spouse's parents, including mother's maiden name

Register-style sketch continued

23. JOHN LOWELL⁸ GARDNER (*Rebecca Russell⁷ Lowell, John⁶⁻⁵, Ebenezer⁴, John³⁻², Percival¹*) was born in Boston, Massachusetts 8 February 1804 and Massachusetts 24 July 1884. He married at 134 Essex Street, Salem, Massachusetts 10 October 1836 CATHARINE ELIZABETH PEABODY, who was born [redacted] and died in Brookline 27 September 1883, daughter of Joseph and Elizabeth (Smith) Peabody.

Children of John Lowell⁸ and Catharine Elizabeth (Peabody) Gardner:

- i. CATHARINE REBECCA GARDNER, b. 1 Aug. 1827; d. Boston 7 April 1833.
- ii. JOSEPH PEABODY GARDNER, b. Boston 2 Aug. 1828; m. 14 Nov. 1860, HARRIET SEARS AMORY. Gen. no. for first child only
- 41 iii. GEORGE AUGUSTUS GARDNER, b. Boston 30 Sept. 1829; m. 8 Nov. 1854, ELIZA ENDICOTT PEABODY. Abbreviated style

Arabic no. for any child to be "carried forward" Born, then died
Place, then date

Child list in *Register* style

17. JOHN AMORY⁸ LOWELL (*John⁷⁻⁵, Ebenezer⁴, John³⁻², Percival¹*) was born in Boston, Massachusetts 11 November 1798 and died there 31 October 1881. He married, first, in Boston 14 February 1822, SUSAN CABOT LOWELL, who was born . . . He married, second, in Salem, Massachusetts 2 April 1829, ELIZABETH CABOT PUTNAM, who was born . . .

Children of John Amory⁸ and Susan Cabot (Lowell) Lowell, born in Boston:

- 31 i. SUSAN CABOT⁹ LOWELL, b. 15 April 1823; m. 13 Oct. 1846, WILLIAM SOHIER.
- 32 ii. JOHN LOWELL, b. 18 Oct. 1824; m. 15 May 1853, LUCY BUCKMINSTER EMERSON.

Children of John Amory⁸ and Elizabeth Cabot (Putnam) Lowell, born at Boston:

- 33 iii. JOSEPH AUGUSTUS PEABODY⁹ LOWELL, b. 15 Jan. 1830, m. (1) June 1854, KATHERINE BIGELOW LAWRENCE; m. (2) . . .

Same pattern for both spouses

Roman numerals continued

Multiple child lists in *Register* style

Samples of other child list issues

Adopted Children

Adopted child of John⁸ and Mary (Smith) Doe, born in Boston:

Child of Mary (Smith) Doe, adopted by John⁸ Doe: Note difference in child-intro

Stepchildren

Child of Mary (Smith) Doe, stepchild of John⁸ Doe:

Twins/Multiple Births

BENJAMIN⁹ LOWELL (twin), b. 12 Sept. 1642.

or

BENJAMIN⁹ LOWELL, twin, b. 12 Sept. 1642. Note status by child's name

i. ELIZABETH PICKERING GARDNER, b. 11 March 1799.
 ii. MARY LOWELL GARDNER, b. 12 Jan. 1802.
 iii. JOHN LOWELL GARDNER, b. Boston 8 Feb. 1804; d. Brookline 24 July 1884; m. Salem 4 Oct. 1826, CATHARINE ELIZABETH PEABODY, b. Salem 23 June 1808; d. Brookline 27 September 1883, daughter of Joseph and Elizabeth (Smith) Peabody.

Children of John Lowell⁸ and Catharine Elizabeth (Peabody) Gardner:
 a. *Catharine Rebecca⁹ Gardner*, b. Boston 1 Aug. 1827; d. Boston 7 April 1833.
 b. *Joseph Peabody Gardner*, b. Boston 2 Aug. 1828; m. 14 Nov. 1860, *Harriet Sears Amory*.
 c. *George Augustus Gardner*, b. Boston 30 Sept. 1829; m. 8 Nov. 1854, *Eliza Endicott Peabody*.

Additional indent & different numbering system

Distinctive typographic style

Grandchild list in Register style

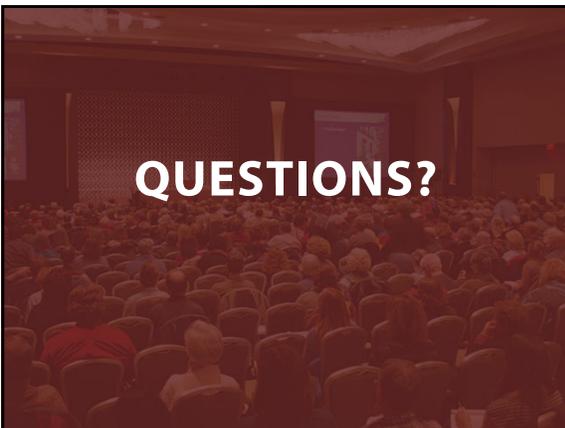
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John Lowell Gardner graduated from the Boston Latin School and Harvard College (1821).

Children of John Lowell⁸ and Catharine Elizabeth (Peabody) Gardner:
 i. CATHARINE REBECCA⁹ GARDNER, b. Boston 1 Aug. 1827; d. Boston 7 April 1833.
 40 ii. JOSEPH PEABODY GARDNER, b. Boston 2 Aug. 1828; m. 14 Nov. 1860, HARRIET SEARS AMORY.
 41 iii. GEORGE AUGUSTUS GARDNER, b. Boston 30 Sept. 1829; m. 8 Nov. 1854, ELIZA ENDICOTT PEABODY.

Additional info follows basic data, and precedes children list, in new paragraph(s).

Register-style sketch





Born-died-married
Place followed by date

2. **JOHN LOWELL GARDNER** was born at Boston, Massachusetts 8 February 1804 and died at Brookline, Massachusetts 24 July 1884. He married at 134 Essex Street, Salem, Massachusetts 4 October 1826, **CATHARINE ELIZABETH PEABODY**.

↑
Father's number is always even.

Ahnentafel sketch

2. **JOHN LOWELL GARDNER** was born at Massachusetts 8 February 1804 and Brookline, Massachusetts 24 July 1884. He married at 134 Essex Street, Salem, Massachusetts 4 October 1826, **CATHARINE ELIZABETH PEABODY**.

No need to list marriage, as already given in husband's paragraph.

3. **CATHARINE ELIZABETH PEABODY** was born at Salem 23 June 1808 and died at Brookline 27 September 1883.

↑
Mother's number is always odd.

Ahnentafel sketch

2. JOHN LOWELL GARDNER was born at Boston, Massachusetts 8 February 1804 and died at Brookline, Massachusetts 24 July 1884. He married at 134 Essex Street, Salem, Massachusetts 4 October 1826, CATHARINE ELIZABETH PEABODY.

3. CATHARINE ELIZABETH PEABODY was born at Salem 23 June 1808 and died at Brookline 27 September 1883.

John Lowell Gardner graduated from the Boston Latin School and Harvard College (1821).

2. JOHN LOWELL GARDNER was born at Boston, Massachusetts 8 February 1804 and died at Brookline, Massachusetts 24 July 1884. He married at 134 Essex Street, Salem, Massachusetts 4 October 1826, CATHARINE ELIZABETH PEABODY.

John Lowell Gardner graduated from the Boston Latin School and Harvard College (1821).

3. CATHARINE ELIZABETH PEABODY was born at Salem 23 June 1808 and died at Brookline 27 September 1883.

Additional info is given under the couple . . .

. . . or could be inserted after the father's paragraph, as the info applies only to him.

Ahnentafel sketch

Tip

Follow a template.

23. JOHN LOWELL⁸ GARDNER (*Rebecca Russell⁷ Lowell, John⁶⁻⁵, Ebenezer⁴, John³⁻², Percival¹*) was born in **place date** and died in **place date**. He married in **place date**, FIRSTNAME LASTNAME, who was born in **place date** and died in **place date**, the daughter of **parent's names**.

<Narrative here>

Children of John Lowell⁸ and Catharine Elizabeth (Peabody) Gardner:

i. CHILD⁹ GARDNER, b. **place date**; d. **place date**.

ii. CHILD GARDNER, b. **place date**; d. **place date**.

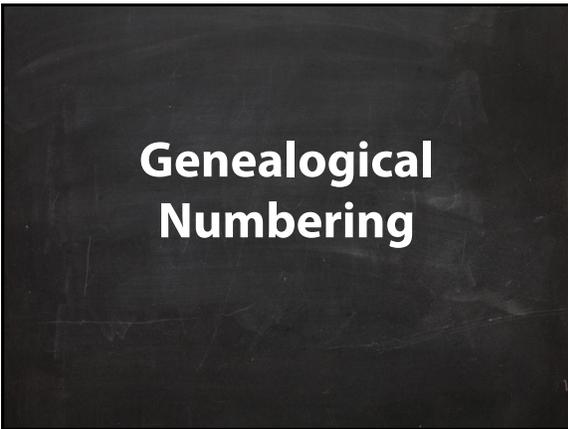
iii. CHILD GARDNER, b. **place date**; d. **place date**.

2. NAME OF FATHER was born at **place, date**, and died at **place, date**. He married at **place, date**, NAME OF SPOUSE.

3. NAME OF MOTHER was born at **place, date**, and died at **place, date**. She married second, **date, place, Name of Second Spouse**, who was born at **place, date**, and died at **place, date**.

<Narrative here>

Template text examples



Genealogical Numbering

Register-style Numbering

1. Each main person gets a number.
2. Numbers are consecutive, beginning with 1 (usually the immigrant).
3. Number must match between the child list and main sketch.

❖ Usually only people with offspring are covered in main sketches.

<p>6. ELIZABETH¹⁰ ROTCH (<i>William¹, Joseph¹, William¹</i>) was born at Nantucket, 9th 12 mo. 1757.¹⁰¹ She died at New Bedford, 2 August 1856.¹⁰¹ She married at Nantucket, 7th 4 mo. 1780, SAMUEL RODMAN, son of Thomas and Mary (Borden) Rodman. He was born at Newport, R.I., 23rd 10 mo. 1728, and died at New Bedford, 24 December 1835.¹⁰¹</p> <p>Elizabeth (Rotch) Rodman, along with her husband, were the impetus to so many of the Society of Friends, most of them became women, the focus of which is in the next vote that revoked Elizabeth's and Mary's position had taken place that he "tendered a resignation to the Mo[nthly] Meeting. He declines had led to this step, which must be well for he said it was not a hasty one, but taken at should only request a copy of the minute m</p> <p>Children of Samuel and Elizabeth (Rotch) R</p> <ol style="list-style-type: none"> 9 i. MARY¹¹ RODMAN, b. 14th 6 mo. 1781. ii. ELIZABETH "ELIZA" RODMAN, b. 24th 12 mo. 1784, unmarried,¹⁰¹ disowned, 27th 12 mo. 1809.¹⁰¹ iii. THOMAS RODMAN, b. 21st 6 mo. 1784; d. mo. 1809.¹⁰¹ 10 iv. WILLIAM ROTCH RODMAN, b. 24th 4 m 11 v. ANNA RODMAN, b. 5th 11 mo. 1787. 12 vi. LYDIA RODMAN, b. 15th 9 mo. 1790. 13 vii. SAMUEL RODMAN, b. 24th 3 mo. 1792. 14 viii. SARAH ROBERTS, b. 31st 10 mo. 1793. 15 ix. BENJAMIN RODMAN, b. 25th 11 mo. 179 	<p style="text-align: center;">2023 311</p> <p style="text-align: center;"><i>Rotch and Rodman Families</i></p> <p>7. WILLIAM¹¹ ROTCH (<i>William¹, Joseph¹, William¹</i>) was born at Nantucket, 29th 11 mo. 1759.¹⁰¹ He died at New Bedford, 17 April 1850.¹⁰¹ He married (1) at Leicester, Massachusetts, 17th 7 mo. 1782, ELIZABETH RODMAN, daughter of Thomas and Mary (Borden) Rodman.¹⁰¹ She was born at Newport, 3 March 1759¹⁰¹ and died at New Bedford, 30th 1 mo. 1828.¹⁰¹ William married (2) Providence, 25 April 1829, LYDIA SCOTT, daughter of Job Scott.¹⁰¹ She was born September 1782 and died at Waltham, Massachusetts, 18 July 1863.¹⁰¹ William, upon his own request, was removed as an Elder by the New Bedford Monthly Meeting, 23rd 10 mo. 1828 in which was noted "William Rotch, Junr. having in our last Mo. Meeting requested to be released from the Station of an Elder, on the ground of want of unity with the minutes or conclusions of the Yearly Meeting, read in this Meeting in the seventh month last, we do, after deliberately considering the case, think it best, at the same time that we feel united with the conclusions referred to, to release him as requested, and no longer consider him as standing in the station of an Elder."¹⁰¹ He was subsequently disowned 24th 9 mo. 1829, "on account of his departure from the order of our Society in marriage . . ."¹⁰¹</p> <p>Children of William and Elizabeth (Rodman) Rotch:</p> <ol style="list-style-type: none"> 16 i. SARAH¹² ROTCH, b. Nantucket, 3rd 6 mo. 1786.¹⁰¹ ii. WILLIAM RODMAN ROTCH, b. Dartmouth, Mass., 1st 11 mo. 1788;¹⁰¹ d. St. Catherine's, Canada West, 18 Sept. 1860;¹⁰¹ m. New York City, New York Co., N.Y., 17 July 1820, CAROLINE STOCKTON, dau. of Richard and Susan (Field) Stockton.¹⁰¹ She was b. Princeton, Somerset Co. (now Mercer Co.), N.J., circa 1804;¹⁰¹ d. New Bedford, 14 Dec. 1856;¹⁰¹ disowned, 25th 1 mo. 1821, for marrying outside the faith.¹⁰¹ 17 iii. JOSEPH ROTCH, b. Dartmouth, 30th 11 mo. 1790.¹⁰¹
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Register 177.3 (Summer 2023)

Sixth Generation

64. JOHN MIDDLETON, called a joiner and cabinet maker in his son's marriage record in 1838. He married at Wakefield, Yorkshire 5 Nov. 1806.⁷⁴

65. ANNE BECKETT, _____

66. JOHN WARD, _____

67. MARGARET _____

68. JOHN ASQUITH, a clerk/dinner in 1838 and 1841, born in Yorkshire ca. 1785 and died by 30 March 1841. He married.⁷⁵

69. MAVER _____, living 30 March 1841, born at Fairburn, Yorkshire ca. 1784.⁷⁶

70. JOHN WARD _____

71. MARGARET _____

72. WILLIAM LEPTON, _____

Seventh Generation

128-143. _____

144. ARTHUR LEPTON, born 20 Jan. _____ at Leeds, Yorkshire 14 Feb. 1747. He married at Leeds 17 Nov. 1773.⁷⁷

145. CHARI KIRBY, with a dowry of _____ at the Call Lane Anon Congregation, Leeds April 1803.⁷⁸

The founder of the Lepton family fortune—William Lepton & Co., established in 1773 only ceased business in 1846—Arthur Lepton was educated in Frankfurt. (His elder brother established himself in Labson in the same period.) While in Germany Arthur befriended his schoolmaster, kinsman Johann Wolfgang von Goethe, who called him 'der junge Engländer' (saying that 'Lepton is a good fellow, a merry irreverent fellow as I see in his letter, which is written with a spirit of jest much likelier indicated by the respect he owes to his master'). Goethe added that in 1764-65 he had 'much intercourse with a young Englishman, who was a student at Herz Philip's pension. He had a good knowledge of his own language; I used to practice it with him, and thereby learned much about his Country and people. My sister was often a third party in our English conversation. And we both sought to acquire the amazing English pronunciation and therewith not only the special tones and sounds but also the very special

$72 \times 2 = 144$

$(72 \times 2) + 1 = 145$

$144 / 2 = 72$

father

mother

son

Sample Ahnentafel numbering

Ahnentafel Numbering

- All numbers must be accounted for. If someone is unknown, give the appropriate number followed by blank lines.

3696-4001. _____

- If someone appears more than once, give the full listing once and subsequently, refer back to the earlier number.

3696. NICOLAS ROY = 3668.

3697. _____ = 3669.

The format is your friend.

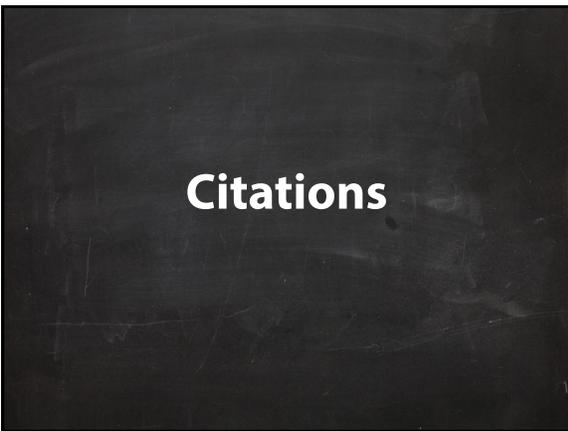
The format will guide you as you enter information.

Write:

- generation by generation
- family group by family group

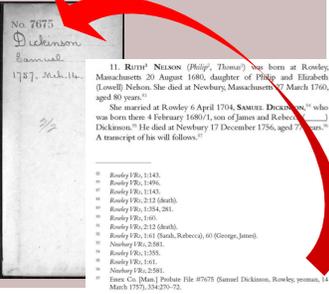






Why are citations important?

- Reliability
- Reproducibility
- Retainability

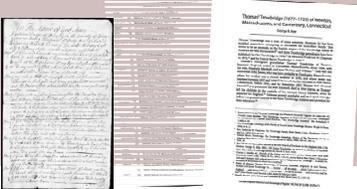


Purposes of Citations

-  To indicate the source of the data.
-  To inform of anything pertinent to the access and interpretation of the data.

Location, Location, Location

- Will readers be able to find the source?
- Does the information come from the best possible source(s)?



For Your Information

- To inform of anything pertinent to the access and interpretation of the data.
 - Lucia Rossetti, “Edmund Davie, Studente Americano a Padova nel 1681,” *Quaderni per la Storia dell’Universita di Padova* 7 (1974): 69, **is indexed but not available online**, as noted 9 Dec. 2011, at centroistoria.unipd.it.
 - Birthdates came from Wheeler, *History of Stonington*, 431, **which incorrectly stated that Esther died unmarried**.

What needs to be cited?

- Anything that is not common knowledge must be sourced.

Common knowledge	John Adams served on the Second Continental Congress.
Less than common	John Adams wrote to Abigail Adams the day after Congress passed the resolution on American Independence.
Quote	The letter stated, "Yesterday the greatest Question was decided, which ever was debated in America, and a greater perhaps, never was or will be decided among Men." ² <small>²Letter from John Adams to Abigail Adams, 3 July 1776, transcription, Massachusetts Historical Society website, at MassHist.org.</small>

Tip
Cite as you write!

Tip
Always **B**e **C**onsistent!



Note for each fact	Note at end of sentence or paragraph
Source citation follows each fact.	Source citation follows a sentence or a paragraph.
Ideal for genealogical community.	Ideal for more narrative style.
Easy to see which reference goes with which text; very clear connection.	Must be sure to indicate within the citation which source applies to which fact.
Some people find it hard to follow text when note numbers appear frequently.	Consolidates footnotes and space, and decreases the number of notes.
	Notes are more time consuming to write; there's more room for error.

THIRD GENERATION

13 Reverend RICHARD³ BILLINGS (*Ebenezer², Roger¹*), son of Ebenezer and Hannah (Wales) Billings, was born in Dorchester, Massachusetts, on 21 September 1625. He died in Little Compton, Rhode Island, on 20 November 1744 and is buried there beside his church. He married in Little Compton in 1700 SARAH¹ LITTLE who was born in Marshfield, Massachusetts, on 23 July 1688, died in Little Compton on 19 March 1745 and is buried with Richard. She was a Mayflower.

1 Arnold, *Vital Record of Rhode Island*, 4 (Little Compton):81; Benjamin Franklin Whitson, *Little Compton Families* (Little Compton, R.I.: Little Compton Historical Society, 1967), 42-43.

2 Author's visit with her daughter Margaret in the 1980s.

3 Arnold, *Vital Record of Rhode Island*, 4 (Little Compton):8.

4 Robert M. and Ruth Wake Sherman, *Vital Records of Marshfield, Massachusetts, to the Year 1850* (Camden, Maine: Picton Press, 1969), 20 (birth), 19 (parents' marriage).

5 Arnold, *Vital Record of Rhode Island*, 4 (Little Compton):81.

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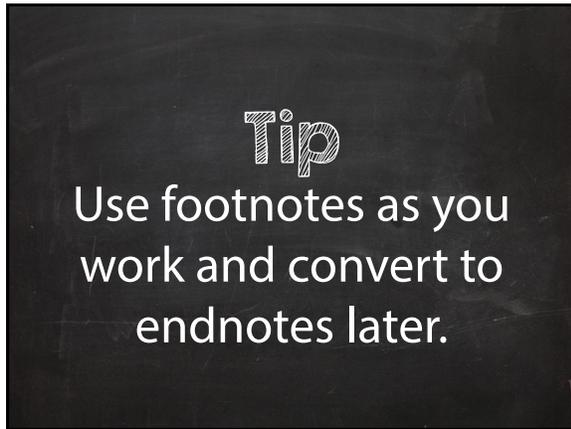
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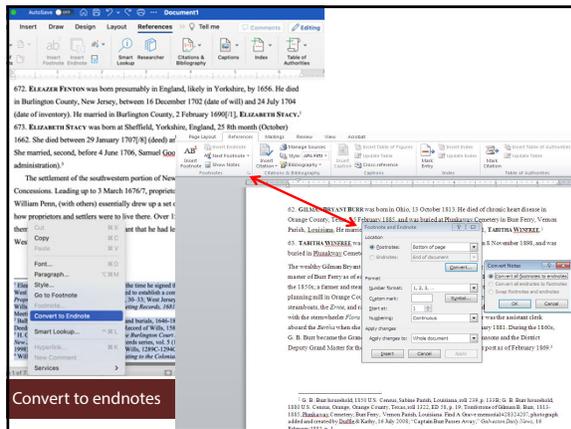
5 Arnold, *Vital Record of Rhode Island*, 4 (Little Compton):81.

Comparison

Notes inserted at end of paragraphs.

Each note contains all the data information for the paragraph, given in order of publication.





Three Citation Styles

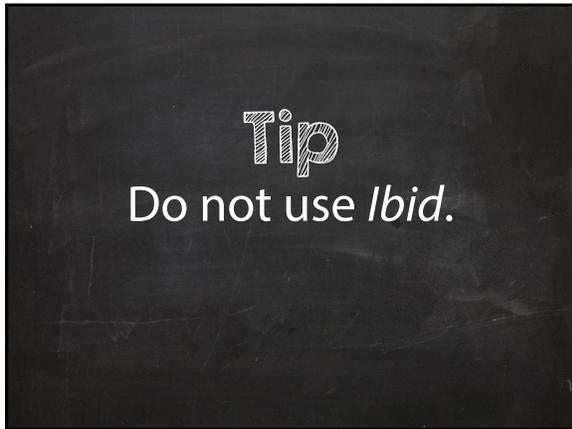
Full Note:

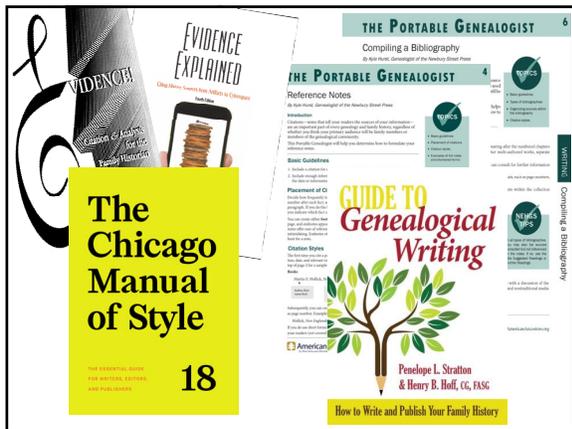
1. Author's Full Name, *Title*
(Publishing Place: Publisher, year), page.

Shortened Note:

2. Author's Surname, *Shortened Title*, page.

Bibliographic Entry:
Author's Surname, First Name. *Title*. Publishing Place: Publisher, year.



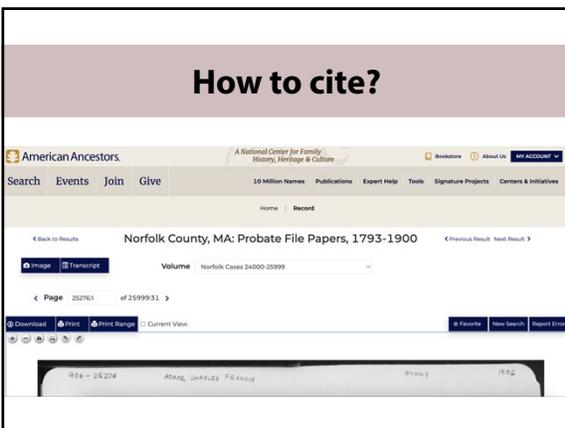


Citation layers		
Record	Access	Secondary Access
Data pertains to the record itself	Data pertains to how the record was accessed	Data pertains to how the record's original collection has been made accessible
<ul style="list-style-type: none"> Record citation. Source citation, citing Record. 	<ul style="list-style-type: none"> Record citation, in <i>Collection</i>, at Location. <i>Collection</i>, at Location, citing Record. 	<ul style="list-style-type: none"> Record citation, in <i>Collection</i>, format data, at Location. Record citation, in format data, citing <i>Collection</i>, at Location.
Answering: <ul style="list-style-type: none"> Who? What? When? 	Answering: <ul style="list-style-type: none"> In what collection? At what repository? Where? 	Answering: <ul style="list-style-type: none"> In what format? How accessed? Where?

Building a citation					
Record		Access		Secondary Access	
Who:	<ul style="list-style-type: none"> • Author • Creator • Subject 	Collection:	<ul style="list-style-type: none"> • Manuscript • Private owner • Database 	Format:	<ul style="list-style-type: none"> • Microfilm, fiche • Digital image
What:	<ul style="list-style-type: none"> • Record title • Record type 	Repository:	<ul style="list-style-type: none"> • Archive, library, society • Website 	Access point:	<ul style="list-style-type: none"> • Film/fiche number • Image number • Database
When:	<ul style="list-style-type: none"> • Date • Year/range • Volume 	Repository location:	<ul style="list-style-type: none"> • City, State • URL/domain 	Location:	<ul style="list-style-type: none"> • Repository • Website

Record		
Who:	<ul style="list-style-type: none"> • Author • Creator • Subject 	Jon Marcus,
What:	<ul style="list-style-type: none"> • Record title • Record type 	"After 400 years, righting a history," <i>Boston Globe,</i>
When:	<ul style="list-style-type: none"> • Date • Year/range • Volume 	24 Nov. 2019,
Reference Data:	<ul style="list-style-type: none"> • Page • Certificate number 	p. M1.

Step 1= Cite the record



Record		
Who:	<ul style="list-style-type: none"> • Author • Creator • Subject 	Norfolk County, Mass.,
What:	<ul style="list-style-type: none"> • Record title • Record type 	Probate case files,
When:	<ul style="list-style-type: none"> • Date • Year/range • Volume 	1886,
Reference Data:	<ul style="list-style-type: none"> • Page • Certificate number 	no. 25276,

Step 1= Cite the record

Record citation: Norfolk County, Mass., Probate case files, 1886, no. 25276,

Access		
Collection:	<ul style="list-style-type: none"> • Manuscript • Private owner • Database 	in <i>Norfolk County, MA: Probate File Papers, 1793–1900</i> ,
Repository:	<ul style="list-style-type: none"> • Archive, library, society • Website 	American Ancestors website,
Repository location:	<ul style="list-style-type: none"> • City, State • URL/domain 	at AmericanAncestors.org.

Step 2= Cite the access data

Record citation: Norfolk County, Mass., Probate case files, 1886, no. 25276,
Access: in *Norfolk County, MA: Probate File Papers, 1793–1900*, at AmericanAncestors.org.

Secondary Access		
Format:	<ul style="list-style-type: none"> • Microfilm/fiche • Digital image 	folder no. 25276, box 906, FamilySearch DGS
Access point:	<ul style="list-style-type: none"> • Film/fiche number • Image group number • Database 	no. 105435208, images 339–504,
Location:	<ul style="list-style-type: none"> • Repository • Website 	at FamilySearch.org.

Step 3= Cite any clarifying secondary access data



