

GENEALOGY 101: The Fundamentals of Family Research

INTRODUCTION

Genealogy, or researching your one's family history, is the second hottest hobby in the US and UK; only gardening is more popular. While there are a small number of professional genealogists with impressive credentials, the majority of family history buffs are self-taught. This program is designed to help these hobbyists become more effective researchers, and to explain how to find and make connections with kindred kin. Necessarily, such an overview is "a mile wide and an inch deep," but by liberally sprinkling links to useful web sites throughout this document, further exploration is encouraged.

GENEALOGY DEFINITION - What it is and why it's important

Genealogy is a long-term process, not a project with a defined end-point

- **Recurring Theme: Your family tree is never really done** - Looking back 500 years (assuming 25 years per generation), each of us has more than 1 million ancestors, so one's family tree is never really complete.

Family researchers come in many different flavors. This program is dedicated to all these types of genealogist:

- **Historians:** who are diligent recorders of ancestors' names, major life events and associated dates and locations.
- **Sociologists:** who strive to understand ancestors' lives in the context of local and world events of their times.
- **Hoarders:** who are the family pack rats, collecting heirlooms, recipes, photos, and family stories.
- **Puzzler Lovers:** who thrill to a never-ending mystery story that yields periodic "Eureka" moments of discovery.
- **Celebrity Wanna-be's:** who seek to prove (or disprove) connections to famous people or even royalty.
- **Scientists:** who catalog hereditary medical maladies to understand personal risks and to help future generations.
- **Romantics:** who know little of their forbearers and yearn for a heartfelt connection with their past bloodlines.

GENEALOGY - Ideas for ongoing learning - Consider joining the *Rock County Genealogical Society*: ▪ rcgswi.org/join-rcgs

- **Local Genealogical Societies;** join where you live & where your ancestors resided; They can provide unique help.
- **Lineage Societies;** for descendants of royalty, celebrity, ethnicity, war veterans: ▪ cyndislist.com/societies/lineage
- **Surname Interest Groups (SIGs);** people who share research interest in your surname: ▪ surname.rootschat.com
- **Read Blogs;** news, education & stories about all manner of topics: ▪ treemily.com/blog/best-genealogy-blogs
- **Listen to Podcasts;** audio discussions on every kind of genealogy topic: ▪ blog.feedspot.com/genealogy_podcasts
- **Read Tutorials and Watch Webinars:** ▪ rcgswi.org/tutorials; ▪ rcgswi.org/webinars;
- **Own Books:** ▪ [*The Genealogist's Companion and Sourcebook*](#) (2nd ed., 2003) by Emily Croom, used < \$30
▪ [*The Source: A Guidebook to American Genealogy*](#) (3rd ed., 2006), by Szucs (Editor), used < \$30

GENEALOGY SYSTEMS - Why a Systematic Approach is Important

- **Recurring Theme: Work from Known to Unknown** - anything else will lead to errors, wasted time and frustration.
- This 5-Step Research Process yields the best possible research results:
 1. **Gather what you already know** - Start with family records, photo albums, heirlooms - research online later.
 2. **Decide what you want to know** - Set a research goal, "What is my maternal grandmother's mother's name?"
 3. **Identify and locate likely sources** - Types of records that could prove (or disprove) your research goal.
 4. **Research** - Systematically review the sources, then record facts & document source info (or else it's hearsay).
 5. **Analyze** - Evaluate findings. Is this fact strong evidence that directly answers your research question or goal?

GENEALOGY SYSTEMS - Where to Begin?

- **Recurring Theme: Begin Close to Home** - Don't waste time researching facts you already have in hand.
 - **Sort & Label** - Scan, title & file newspaper clippings, photos, letters, diaries, bibles, school & military records.
 - **Begin with yourself** - Name, dates & locations of life events - then build backward to parents & grandparents.
 - **Talk to your eldest relatives** - They are like a Library. Interview advice here: ▪ rcgswi.org/interview-questions
 - **Don't jump ahead** - It's tempting, but first build a firm foundation, to avoid futile wild goose chases.
- **Recurring Theme: Focus on one person at a time** - Exhaust available sources fully, then move on to their parents.
- **Recurring Theme: Your tree's living people need their privacy protected** - Software will help, but it's up to you.

GENEALOGY TOOLS - Paper forms, PC files, the "cloud" and more.

- **Recurring Theme: Build paper & digital filing systems** - *SURNAMES* > *BRADFORD* > *Bradford, Ira A. (1820-1890)*.
- Paper Forms: (1) *Family Group Sheets*, (2) *Pedigree Charts* and (3) *Research Logs* ▪ rcgswi.org/forms-charts
- PC/Mac Programs: many products, most have free trials; how to choose software video: ▪ youtu.be/9Bs15nZ6ZY0
 - Look at [Family Tree Maker](#); PC & Mac; ▪ [Rated easiest to use](#) and ▪ [syncs with FamilySearch & Ancestry](#)

- Cloud-based Genealogy options:
 - **Products:** DNA tests, analysis & matching; build a tree & search others' trees; search vast digitized records.
 - **Storage:** Store & sort photos, file stories, biographies and other documents, build & refer to research logs.
 - **Sharing:** Automatically identify and connect with possible kin; facilitate private messages and collaboration.
- Hybrid: **Family Tree Maker** (40% off: mackiev.com/offers/rootstech2021/index.html?edition=us)+**Cloud** ([Ancestry](#))

GENEALOGY FACTS - Sorting Fact from Fiction

- TYPES OF FACTS - keep these in mind as you search; your tree software prompts you to collect these fact types:
 - **Events:** birth, baptism, marriage, divorce, death, burial, residence, occupation, nickname, military service.
 - **Dates:** 12 Dec. 1799, ▪ c. 1874 (c. = circa = about), ▪ bef. 1960, ▪ aft. 1972, ▪ betw. 13 Apr. 1879-12 Apr. 1880.
 - **Locations:** ▪ Chicago, Cook Co., IL, ▪ Germersheim, Rheinland-Pfalz, Germany, ▪ Antrim Co., MI.
 - **Descriptions:** ▪ 312 W. Oak St., ▪ St. Mary's Cemetery, ▪ Blacksmith, ▪ living at the time of his wife's death.
 - **Stories:** fun to record; great starting points for research goals; but don't accept it as fact without research.
- SOURCES - **Original or Derivative:** Is a source the original (or an image) **OR** is it a transcript, index or summary?
- INFORMATION - **Primary or Secondary:** Was the info witnessed by the author **OR** was it 2nd- or 3rd-hand?
- EVIDENCE - **Direct or Indirect:** Does the evidence clearly prove a fact **OR** does it just support or hint at it?
- Expect conflicting facts - clerk typo's, indexing errors, ancestral illiteracy or vanity & Anglicizing create confusion.
- Record all variations and identify a "preferred fact" based on number & quality of *Sources, Information, Evidence*.

GENEALOGY CITATION - Why source citation (a footnote) for each research fact is important

- **Recurring Theme: Recording sources pays big dividends** - like building a firm foundation under a new home.
- To allow you to compare the strength of conflicting facts by looking at the reliability of their underlying sources.
- To bullet-proof your research; avoid easily prevented errors which can lead to decades-long wild goose chases.
- To demonstrate that you are careful and meticulous, so other serious family researchers feel comfortable sharing.
- To allow you and others to backtrack to the original sources of your facts to pursue "deeper dives" later-on.
- It's easy: source documentation is automatic with tree software as you add online facts; you're guided for others.

GENEALOGY RECORDS TYPES

- **Recurring Theme: The record you want isn't online** - only 25% of records are online (and 50% of those are faulty).
- HOME RECORDS - Start here; a wide variety of different records: albums, keepsakes, letters and other documents.
 - **Record Types:** *Correspondence, Newspaper Clippings, Photos, Scrapbooks, Diaries, Family Bibles, Military Discharge Papers, Naturalization Papers, Memorial Cards, Work and School papers, and Family Heirlooms.*
 - **Find records at:** Parents', grandparents', other relatives' homes; Ask, "Who is the family archivist?"
 - **Hint:** Start in your own & relatives homes; record, scan or photograph everything ▪ www.heirloomvault.net
- CENSUS RECORDS - US Census each decade beginning 1790; before 1850 heads of family only; 72 year wait rule.
 - **Types:** Federal Schedules: *Population, Mortality, Ag., Slave, Veterans*, also some *State & Territorial Censuses*.
 - **Find Records at:** free and subscription web sites; indexing quality is uneven, so always look at the image.
 - **Hint:** search ▪ Archives.gov/research/genealogy/census/online-resources (links to free sites).
- CHURCH RECORDS - Non-uniform, variable record-keeping and retention; some in families of traveling pastors.
 - **Record Types:** *Birth, Baptism, Marriage and Death*; but also *Membership Directories*.
 - **Find Records at:** Local church & synagogue historians (often genealogists), Regional Archives, LDS archives.
 - **Hint:** Search "Place" at ▪ FamilySearch.org/search/catalog; search free indexes at ▪ Ancestry.com
- COURT RECORDS - More uniform format, but clerks' recording can be idiosyncratic; sometimes indexed .
 - **Record Types:** Look for *Orders/Decrees, Judgments, Case Files, Indexes, Naturalizations & Divorce Petitions*.
 - **Find Records at:** Local county courthouses; less often state or federal courts, online indexes.
 - **Hint:** Google: *+index "court records" "Rock county, Wisconsin"* (substitute your county & state).
- DEATH RECORDS - Death records are detailed for medical, criminal, life insurance, pension & inheritance reasons.
 - **Record Types:** *Local Courthouse Death Certificates; Newspaper Legal or Death Notices and Obituaries; Wills, Probate, Pension and Church Records; Memorial Cards; Cemetery Indexes; US Social Security Death Index.*
 - **Find Records at:** County courthouses, cemetery sextons, libraries & genealogical societies, online indexes.
 - **Hint:** ▪ Ancestry.com, ▪ FindaGrave.com, ▪ FamilySearch.org/search/collection/1202535, ▪ rcgswi.org/indexes
- LAND RECORDS - Land ownership records: indexes of plat maps, deeds, mortgages, patents & homestead grants.
 - **Record Types:** *County Plat Maps* (owners, not tenants), *Deeds, Mortgages, Patents and GLO/BLM Grants*.
 - **Find records at:** LDS Family History Centers, local courthouse, county recorder's office, National Archives.
 - **Hint:** Gov't: ▪ glorerecords.blm.gov/search/; ▪ NARA: archives.gov/research/land/; ▪ rcgswi.org/atlasses--maps

- VITAL RECORDS - Common government records that are considered most reliable; but there are substitutes.
 - **Record Types:** *Birth, Marriage, Divorce & Death Records; Marriage Applications & Delayed Birth Registration.*
 - **Find records at:** County courthouses, state repositories, LDS Family History Centers, online indexes.
 - **Hint:** ▪ wisconsinhistory.org/Records/Article/CS15307; Google: *your county, your state "vital records"*
- MILITARY SERVICE RECORDS - Various government records of military duty.
 - **Record Types:** Service Records, Pensions, Bounty Land Grants, Awards, Draft Registrations, Unit Histories.
 - **Find records at:** Gov't agencies, soldiers' & sailors' draft cards and discharge papers (DD-214), online indexes.
 - **Hint:** ▪ archives.gov/research/military; Request at: ▪ va.gov/records/get-military-service-records
- HISTORICAL NEWSPAPERS - Ancestors may be mentioned or listed in many types of local newspaper articles
 - **Record Types:** Birth, Marriage, Death, Legal Notices, Ads, Unclaimed Mail & Voter lists, Social Pages, Crimes.
 - **Find records at:** Local library microfilm using an index; genealogical society publications, online indexes.
 - **Hint:** ▪ rcgswi.org/indexes, ▪ ChroniclingAmerica.loc.gov, ▪ Newspapersd.com, ▪ cdnc.ucr.edu/cgi-bin/cdnc
- OCCUPATIONAL RECORDS - Even farmers leave a record of their job & interests, if you know where to look.
 - **Record Types:** Census Records, Union Memberships, Community, Professional & Social Groups Records.
 - **Find records at:** Census Records, Newspaper Articles, City Directories, Online Indexes, Military records.
 - **Hint:** www.familysearch.org/wiki/en/City_Directories; also see census links above.
- PUBLISHED SOURCES - There are a many published local history sources:
 - **Record Types:** Historical Books, Periodicals, Published Family Histories, Online Digitized Books.
 - **Find records at:** PERSI, Google Books, Local genealogical & historical societies; local libraries.
 - **Hint:** Search full-text books, manuscripts and periodicals at: ▪ hathitrust.org; ▪ dp.la/search, ▪ Books.Google.com, ▪ WisconsinHistory.org, ▪ digicoll.library.wisc.edu, ▪ FamilySearch.org/search/catalog, ▪ [FamilySearch.org/wiki/en/Periodical_Source_Index_\(PERSI\)](http://FamilySearch.org/wiki/en/Periodical_Source_Index_(PERSI)), ▪ rcgswi.org/search-50-full-text-books
- SCHOOL RECORDS - Even if attending only briefly, records may exist; both at home and within repositories.
 - **Record Types:** Yearbooks, School Newspapers, Report Cards, Local Newspapers re: awards & events.
 - **Find records at:** In the homes of relatives, Local Libraries, Census Designation: In School, Online Indexes.
 - **Hint:** ▪ Classmates.com/yearbooks, ▪ Newspapers.com, ▪ Ancestry.com/yearbooks/usa
- TAX RECORDS - Like death, taxes are unavoidable and well-documented - and give insights into ancestors lives.
 - **Record Types:** Tax Records exist at the Local (property), State (income & licenses) and Federal (income) levels.
 - **Find records at:** Taxing authorities: Local courthouse, state records, federal records, online indexes.
 - **Hint:** often dispersed, protected and difficult to access; ▪ archives.gov/research/genealogy/tax-records
- IMMIGRATION RECORDS - Alien status in a census is a clue; many approaches to documenting immigration.
 - **Record Types:** Census Records, Ships' Passenger Lists, Arrival & Screening Records and Naturalization Papers.
 - **Find records at:** Census records (status & arrival), courthouse naturalization, Castle Garden & Ellis Island files.
 - **Hint:** ▪ Immigrant Research Strategy: Thoughtco.com/finding-your-immigrant-ancestors-birthplace-1420608, ▪ Immigrant Ancestors: mmigrants.byu.edu/main_page, ▪ Castle Garden, NY: castlegarden.org/searcher, ▪ US Records of Immigration & Naturalization: uscis.gov/records/genealogy, ▪ NARA Passenger Lists: aad.archives.gov/aad/series-list.jsp?cat=GP44, ▪ Ellis Island, NY: heritage.statueofliberty.org/passenger

ONLINE RECORDS RESEARCH - Finding Online Resources

- **Recurring Theme: You can start online, but you can't do it all online** - see courthouse, library & archive records.
- **Recurring Theme: Other than images of original documents, EVERYTHING on the Internet needs confirmation.**
- Google.com - free, powerful, but requires focus to be useful; see *50 Google Tips*: rcgswi.org/google-tips--tricks
- G-Tools: Images.Google.com, Books.Google.com, Maps.Google.com, Google.com/Alerts, rcgswi.org/google-alerts
- Online Resources - Some are free; other subscription services (\$) often offer an introductory 14 day free trial:
 - Ancestry.com - Free tree builder; \$\$\$ for hints & to search 27 billion records; DNA tests, analysis & matching.
 - Google the words: *free Ancestry indexes*: Free but hard to find; 1200 of Ancestry's US & international indexes.
 - myHeritage.com - \$\$ with some Free; Free limited (250 person) tree; 13 billion records; DNA tests & analysis.
 - Familysearch.org - Free; LDS Church's free tree builder, billions of record images, local Family History Centers.
 - Newspapers.com - \$\$; Millions of searchable newspaper images; search by name, date and/or location.
 - Archives.gov - Free digitized images of NARA government records; \$ for copies of records not yet digitized.
 - ChroniclingAmerica.loc.gov - Free; Library of Congress' searchable newspaper images.
 - USGenWeb.org - Free; US county-specific history, biographies, obituaries, newspaper and other indexes.
 - FindaGrave.com - Free; search millions of graves by name & location, often with bits of additional family info.
 - Linkpendium.com - Free; a vast collection of family research links, searchable by surname or by location.
 - FamilySearch.org/wiki/en/Main_Page - County research guides; records, maps, border history, place names.

ONLINE RECORDS RESEARCH - How to Evaluate Online “Matches” with your Ancestors - Look at:

- **Tree Size** of an online “match”: more than 2,000 may mean this is a “branch collector,” not a researcher.
- **Number of sources** within the tree of your possible “match”; more is better & indicates diligence.
- **Source Overlap**: between your ancestor & the “match”; new sources may be gems: letters, bibles or photos.
- **Look Inside the Sources**; Is the new source’s “match” the right age, in the right family & at the right location?
- **Fact Quality**: Is it an ▪ *Original or Derivative Source* ▪ *Primary or Secondary Info* ▪ *Direct or Indirect Evidence*?

CONNECTING AND COLLABORATING - How to find and share information with researchers who might be related

- **Recurring Theme: Anything you share or post online will be borrowed (or taken without credit)** - just expect it.
- **Work from Known to Unknown**: ask relatives, “Who’s our family’s historian(s)?”; contact those branches first.
- **Start Interviewing Elderly Relatives** - for interview advice and questions see: rcgswi.org/interview-questions
- **Contact Owners** of well-sourced online trees tactfully at ▪ Ancestry.com, ▪ MyHeritage.com, ▪ FamilySearch.org
- **Identify a City** where your ancestors resided, then search whitepages.com by surname & tactfully cold call them.
- **Use Social Media**: ▪ FamilyTreeMagazine.com/resources/online/best-social-media-for-genealogy

TEN COMMON GENEALOGY MISTAKES - You’ll thank me for these later!

- **Putting-off Interviews of Living Relatives**: They won’t be there forever; their passing is like a library closing.
 - **Neglecting to Record Sources** - facts without sources are myths; build the habit of source documentation early.
 - **Jumping to Conclusions** - don’t assume a “matching” person is your ancestor; given names repeat in families.
 - Never “copy and paste” a whole branch from a tree based on one “matching” person. Treat as a clue & verify.
 - **Failing to Read the Whole Record** - read fully for any confusing points; use a time line or a spreadsheet to clarify.
 - Look on reverse side of photos for additional notes. Look on adjacent pages of census for extended family.
 - **Forgetting to Research Siblings** - Sometimes siblings’ records provide new details and research breakthroughs.
 - A brother’s birth certificate may show Irish birth; a sister’s grave may be among previously unknown kin.
 - **Failing to list Females under Maiden Names** - Recording women by married names adds to everyone’s confusion.
 - If her maiden name is not known (yet) list as Eunice UNKNOWN; it prompts you to continue to look into it.
 - Know that marriage to relatives was not unusual; women’s maiden and married names can be the same.
 - **Trusting Others’ Research without Verifying** - be wary of trees whose sources point only to other trees.
 - Copying unconfirmed or incorrect facts embed bad facts into your research (which others copy & spread).
 - *Just because Johnny jumped off the bridge*: Multiple trees with the same misinformation don’t add validity.
 - *My tree is bigger than your tree*: Genealogy is not competition for the most relatives; beware “collectors”.
 - *But I read it on the Internet, it must be true*: the web makes it easier to find things... including faulty research.
 - **Discarding Records because of Spelling Differences** - don’t expect spelling consistency; search name variations.
 - Spelling changed with war; many German- & Italian-Americans Anglicized their names during WWI & WWII.
 - Spellings varied because ancestors may have been illiterate; clerks & newspapers often made best-guesses.
 - Inconsistent over a person’s life; sometimes a single landowner will hold parcels under multiple spellings.
 - Scandinavian patronymic naming practices ended in 1901; families then chose a fixed surname thereafter.
 - Indexing Errors: Indexers often misinterpret handwritten original records; always view the original image.
 - **Believing Family Legends** - Be like Ronald Reagan: “Trust but verify” (write it down but independently research).
 - **Waiting to get a DNA Test** - Read about DNA privacy implications; but you don’t need to be an expert to be tested.
 - There is often special pricing on Valentine’s Day, Mother’s Day, Father’s Day, Christmas and New Years.
 - There’re 3 kinds of DNA tests; understand which will help you most (or get all 3 at LivingDNA.com).
 - Relatives may find you based on DNA overlap - especially if your DNA and tree are online together & linked.
 - *Choosing a DNA test*: rcgswi.org/dna-article-101; *I got my DNA result, now what?*: rcgswi.org/dna-article-201
- Recurring Theme: DNA is just another “fact,”** - better at disproving kinship than revealing an exact relationship.

HAVE SOME FUN

- Search and “watch” auction sites for family memorabilia: ▪ Ebay.com search: *your surname + family or keepsake*
- Look at the meanings and origins of your names: ▪ rcgswi.org/name-meanings
- Explore what your surname family crest might have looked like: ▪ TheTreeMaker.com/coat-of-arms-search
- Find famous relatives automatically at ▪ RelativeFinder.org if you have a tree at ▪ FamilySearch.org
- Overlay historical events on an ancestor’s lifetime: ▪ HistoryLines.com, or a time capsule: ▪ dmarie.com/timecap
- Create short animations from long-dead ancestors’ still photos at: ▪ myheritage.com/deep-nostalgia