



Family History: Your Genealogical Expedition

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GET ORGANIZED

1. Plan how you'll store all the records/photos/artifacts you accumulate: digital versus paper
2. Genealogical forms (especially interactive or fillable PDF forms)
 - FamilySearch: https://www.familysearch.org/en/wiki/Genealogy_Research_Forms
 - National Archives: <https://www.archives.gov/research/genealogy/charts-forms>
 - National Genealogical Society (NGS) Free Charts and Templates: <https://www.ngsgenealogy.org/free-resources/charts/>
 - Midwest Genealogy Center: <https://www.mymcpl.org/genealogy/research/family-history-forms>
3. Consider using genealogical software
 - Family Tree Maker: <https://www.mackiev.com/ftm/>
 - Legacy Family Tree (MyHeritage): <https://legacyfamilytree.com/>
 - Roots Magic: <https://www.rootsmagic.com/>
4. Consider using one or more of the free online family tree websites.
 - FamilySearch: <https://familysearch.org> - **SHARED FAMILY TREE**
 - Wiki: <https://www.wikitree.com> – **SHARED FAMILY TREE**
 - Ancestry Registered Guest:
 - <https://support.ancestry.com/s/article/Free-Registered-Guest-Accounts>
 - Findmypast: <https://www.findmypast.com/home>
 - Geneanet: <https://en.geneanet.org/>
 - American Ancestors: <https://americanancestors.org/tools/american-ancestors#/>
 - MyHeritage (Basic Subscription): <https://www.myheritage.com>
5. Common recording conventions
 - Names: First - Middle - Last name at birth (LNAB) (i.e. maiden name for women).
 - Locations: Smallest to largest jurisdiction (e.g. Town, Township, County, State, Country)
 - a) Best Practice - don't abbreviate location names
 - b) Use the location jurisdiction that existed at the time of the recorded event**
 - Dates: Day Month Year (Best practice – spell out the month/don't abbreviate it)

START WITH WHAT YOU KNOW (OVERVIEW OF THE RESEARCH PROCESS)

(Ref: https://www.familysearch.org/en/wiki/Research_Process)

1. Select the person you want to learn more about
2. Carefully evaluate what is "known" – The Initial Survey
 - What's around the house?
 - a) Vital Records (birth, baptism/christening, marriage, divorce, death)
 - b) Other death-related records (funeral records, obituaries, social security records, wills, probate)
 - c) Family bible
 - d) Newspaper clippings
 - e) Correspondence/letters
 - f) Family photos
 - g) Passports, licenses (recreational and motor vehicle), identification cards
 - h) Medical and legal records (health records, real estate records, civil or criminal court records)

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- i) School records (school census, attendance records, report cards, yearbooks)
- j) Baby books, scrapbooks, diaries, personal journals
- Reach out to living relatives
 - a) Create & routinely update a contact list with addresses, emails, phone numbers
 - b) Keep notes for all oral communications and save copies of all written correspondence
- Search for published family trees/genealogies (CAUTION)
- Locate, examine, and analyze the sources cited in published trees/genealogies
3. Formulate a focused research question and any associated hypotheses
4. Identify potential sources of pertinent information
5. Search the records—record your results. ALWAYS use your research log.
6. Analyze your findings: https://www.familysearch.org/en/wiki/Evaluate_the_Evidence
 - Source: Original – Derivative – Authored
 - Information: Primary – Secondary – Indeterminant
 - Evidence: Direct – Indirect – Negative

RECORD EVERYTHING YOU DO AND EVERYTHING YOU FIND

1. Create a research log. At a minimum include the following:
 - Search date
 - Record contents
 - Detailed source citation
 - Analysis of the source/record
- Optional elements
- Repository (and associated call numbers)
 - Source description
 - Whatever else you want to track

Preparing detailed source citations (see page 4) FOR EVERY SOURCE EXAMINED

The goal of a source citation is its ability to:

1. Keep track of every source examined regardless of whether the research subject was found in the source,
2. Assist the user in relocating the source quickly/efficiently,
3. Provide recognition/credit to the record creator for their intellectual property, and
4. Provide sufficient detail for analysis of the record as to its source type, information reliability, and evidentiary value.

IMPROVING GENEALOGICAL SKILLS

1. Internet: Podcasts, webinars, webcasts
 - NGS ConferenceKeeper Calendar of Events. <https://conferencekeeper.org/>
 - Legacy Family Tree Webinars. <https://familytreewebinars.com/>
2. Seminars, Conferences and Institutes
 - State/local genealogical societies/groups
 - a) Guilford County Genealogical Society: <https://guilfordgenealogy.org>
 - b) Wake County Genealogical Society: <https://wakecogen.org>
 - c) North Carolina Genealogical Society: <https://www.ncgenealogy.org>
 - d) Virginia-North Carolina (VA-NC) Piedmont Genealogical Society.
<https://www.vancpgs.org/contents/index.php>
 - RootsTech: <https://www.familysearch.org/en/rootstech/>

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- National Genealogical Society, Learning Center: <https://www.ngsgenealogy.org/learning-center/>
 - Genealogical Institutes
 - a) Salt Lake Institute of Genealogy (UGA): <https://slig.ugagenealogy.org/index.php>
 - b) GRIP Genealogy Institute (NGS): <https://grip.ngsgenealogy.org/>
 - c) Genealogical Institute of Federal Records (Gen-Fed): <https://www.gen-fed.org/>
 - d) Institute of Genealogy and Historical Research (IGHS): <https://ighr.gagensociety.org/>
3. Coursework
- State Library of North Carolina, “RootsMOOC”: <https://statelibrary.ncdcr.gov/genealogy-and-family-history/getting-started-genealogy-research/rootsmooc>
 - ed2go, “Genealogy Basics”: <https://www.ed2go.com/courses/health-and-fitness/wellness/ilc/genealogy-basics>
 - Salt Lake Technical College: https://www.slcc.edu/sltech/areas/fully_online/genealogy.aspx
 - International Institute of Genealogical Studies: <https://genealogicalstudies.com/>
4. Publications
- Peer-reviewed Journals
 - Magazines
 - Reference Books
 - Websites
 - a) FamilySearch Help & Learning: <https://www.familysearch.org/en/help/helpcenter/landing>
 - b) Ancestry Academy: <https://www.ancestryacademy.com/browse>
5. Seek the help/advice of other genealogists
- FamilySearch Centers: <https://locations.familysearch.org/en>
 - FamilySearch Community, <https://community.familysearch.org/en>
 - FamilySearch Virtual Research Consultations: <https://go.oncehub.com/ResearchStrategySession>
 - Association of Professional Genealogists, “How to hire a professional genealogist,” https://apgen.org/how_to_hire_a_professional_gen.php
 - FamilySearch Wiki, “Hiring a Professional Researcher,” https://www.familysearch.org/en/wiki/Hiring_a_Professional_Researcher

NETWORK AND COLLABORATE

1. “Popular Social Networks for Genealogy”:
https://www.familysearch.org/en/wiki/Popular_Social_Networks_for_Genealogy
 - FamilySearch Blog, <https://www.familysearch.org/en/blog/>
 - The Legal Genealogist, <http://www.thelegalgenealogist.com>
 - The Genealogy Guys, <http://www.genealogyguys.com>
 - Genealogy Gems, <http://lisalouisecooke.com>
 - 16,000+ Genealogy & History Groups on Facebook, <https://socialmediagenealogy.com/wp-content/uploads/2021/01/genealogy-on-facebook-jan-2021.pdf>
2. Genealogical/Historical Societies
3. Websites
 - FamilySearch Chat and Email
 - Ancestry Messaging and Message Boards

And remember, DON'T

Just copy published genealogies

Trust everything you find

Jump to conclusions

Assume

Fall in love with a name spelling

Rely solely on indexes and databases

Routinely use abbreviations

Give up!

The basic building blocks of a **SOURCE CITATION**
Who? What? When? Where? Wherein?

1. Creator (Who?): author, editor, compiler, translator, agency/website, unknown
2. Title (What?): either the title shown on the source or an identifier we create for the source
3. Descriptor (What?): edition, volume, page, series numbers, nature of website content (images, database, article, map, family tree, etc.). The descriptor is always placed immediately after the title it describes.
4. Place of creation, publication or access (Where?):
 - a. Books: (Location published: Publisher, year published)
 - b. Website: Website creator (URL : date accessed)
5. Where accessed: Required for one-of-kind items that can only be found in a specific repository (e.g. manuscripts, artifacts, documents). Describe how to find that specific item: repository identity, collection name, file title, record group, document title, etc.
6. Publisher (Who?): Book, DVD, map publishers are identified. Publisher is rarely cited for journals, magazines, and newspapers, unless needed to differentiate works with similar titles.
7. Date/Year of creation or publication (When?): This is an extremely important element to include because it helps evaluate the relevancy of the source in relationship to time from the recorded event.
8. Specific item (Wherein?): Could include specific volume within a multivolume set (total number of volumes in set should be identified in descriptor section), page number(s), table/figure number, location within a newspaper (e.g. "Section A" or "Lifestyle" and/or page and column numbers), section heading or paragraph of a webpage or blog, or film and/or image number for digitized records.
9. As needed, cite the referenced source: Included for original sources used to create the cited source (e.g. databases).

References for source citations:

- FamilySearch Wiki. "Cite Your Sources (Source Footnotes)." Updated 15 January 2024. [www.familysearch.org/en/wiki/Cite_Your_Sources_\(Source_Footnotes\)](http://www.familysearch.org/en/wiki/Cite_Your_Sources_(Source_Footnotes)).
- Jones, Thomas W. *Mastering Genealogical Documentation*. Arlington, VA: National Genealogical Society, 2017.
- Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*. 4th Ed. Baltimore, MD: Genealogical Publishing Company, 2024.
- Mills, Elizabeth Shown. "Evidence Explained: Historical Analysis, Citation & Source Usage." Accessed 5 June 2024. www.evidenceexplained.com.