

## Tips and Tactics from Fifty Years

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This is a combination of observations and ideas by myself and a friend. At the time we compiled it we had, between us, 57 years of genealogical research experience. We realized that we had accumulated a sizable amount of knowledge through lessons learned, special approaches, and other useful information gained that could be shared with other researchers.

### **Topics to be covered:**

1. Starting in a new library
2. Build a full life picture
3. Broaden your scope
4. Move in order, don't jump
5. Document all sources
6. Consider all spellings
7. Use every record type
8. Get to the original
9. Printed versus original
10. Primary vs. secondary
11. Indices: good and bad
12. Cemeteries
13. Pursue Bible records
14. Use major finding aids
15. Be as organized as possible
16. Chart your problems
17. Consider what will become of your research

### **Get oriented at the start in a new library or repository**

Ask for an orientation, or introduction and handouts

Staff will be glad to tell about their facility

Learn what is different, special; what collections or resources or finding aids does this facility has which are unique

Libraries grow and change – ask what is new since your last visit, if it has been a year or more

### **Focus on full life for each person**

If you just collect names, dates and places, you miss a great deal. The additional facts and information you discover can give you marvelous family color, stories to share. This helps fill in the family narrative when you write it.

**Broaden your scope** – search for more than just the basic birth/marriage/death and census.

Look for any facts or records you can find on the life of each individual.

Look at and work on whole family. You will not only find more with this approach, you will be linking together and preserving the complete family unit.

**Target theory.** Think of it this way: pick a larger target and you increase your chances of success. It is like aiming at the bullseye on a dartboard, but still scoring some points when you land a dart father out on the board. If you search for the entire family, you are far more likely to find something than if you are only looking for one specific individual, your direct ancestor in that group. And sometimes, the very information you want most about your direct ancestor may be contained in a record pertaining to a sibling or other family member.

Another way to think of this is that you can catch more fish with a bigger net

### **Move in order, don't jump**

Just because you have found the state where an ancestor was born, doesn't mean you must drop everything you are doing and search for the family in that state. Take your time, carefully seek out each record to fully document the family in the current place of residence before moving your search to the new location. You may find valuable clues to focus the next phase of the search. It is always best to work from the known to the unknown, and to avoid skipping steps in haste.

### **Always document all sources, as best you can.**

At the very least, note a microfilm number on margin of copies so you can look up a full citation later, and copy title pages of books and staple to the pages you copy.

Ideal: maintain a calendar of sources and full source for all documents and information.

I use a form which I developed based on one found in the chapter on organizing and evaluating research findings in Val Greenwood's *Researcher's Guide to American Genealogy* (3<sup>rd</sup> ed., Genealogical Publishing Co., 2000). Additional excellent help and another good form of research log is provided in *Managing a Genealogical Project*, by William Dollarhide (Genealogical Publishing Co., 1999).

Do what works for you, as long as you do something.

### **GOAL:**

Should always be able to tell another searcher, clearly and correctly, where your information was found.

AND anything you publish—including posting on the Internet—should cite sources. Think credibility.

### **Consider all spellings, nicknames, diminutives**

#### **SURNAMES**

O'Neill, has been found as Neal, etc. Other multi-syllable names, especially if the first syllable sounds the same as a letter (De--, Tea--, Sey--) can fall prey to the same problem: that first syllable may be listed as a middle initial, or dropped altogether.

There are many spelling variations, especially in census.

Transpositions of letters are a common occurrence.

Possibilities increase when name is foreign, or record keepers are of foreign background.

Allow for these; search for all variations. Don't be like many researchers I have met, who *insist* that their family/ancestor "always spelled the name 'that' way." Well, maybe the ancestor did, but that certainly doesn't mean the census enumerator or records clerk did!

#### GIVEN NAMES

When you add variations in given names to spelling variations for surnames, you bring in another dimension.

You may be looking at the very person you are seeking and not recognize them.

Consult reference guides. There are a number of guides available. A good one is *Nicknames Past and Present*, by Christine Rose (5<sup>th</sup> ed., CR Publications, 2007). You can also find similar lists and resources online. Check the category on Names in Cyndi's List ([www.cyndislist.com](http://www.cyndislist.com)). Look, also, for articles in periodicals.

Consider every possible variant

Make a checklist if necessary

Don't forget that your person may be listed by initials only, especially in certain census schedules...when the enumerators were looking for an easy way to deal with all of the data they had to collect. Some database programs and indices will treat or display people listed by initials only in a separate part of the results, and you may miss them if you are not looking for this.

Here are a few examples of some common nicknames or diminutives for women:

Peg, Meg	<i>for</i>	Margaret
Callie, Carrie	<i>for</i>	Caroline
Patsy, Pat, Mat	<i>for</i>	Martha
Hetty	<i>for</i>	Henrietta or Mehitabel

More unusual: Sukey, Leafy, Nab, Orolia, Jode, Crece

And here a few for men:

Hiley	<i>for</i>	Hiram
Frank	<i>for</i>	Francis, Franklin
Con, Neal	<i>for</i>	Cornelius
Ned, Ed	<i>for</i>	Edward, Edwin

Then there are the more unusual examples such as Fate, Bat, Zeke, Nace, Gum, Leet.

Some nicknames or diminutives are now common as given names:

A few examples: Jack, Luke, Harry, Bill, Molly, Beth, Sue, Sally

If you find an individual with one of these names in the 19<sup>th</sup> century or earlier, they most likely have a more formal, given name, and this is just the nickname. They may appear in some of the records under the formal or legal name, not the nickname. Be aware of it so you don't overlook a record which is critical to your search.

**Consider every record type or your search is not complete.**

Look at all aspects of a person's life.

What were they involved in . . . was the man in the military, did he own property which would be taxable, was he involved in a trade, did he belong to a lodge or fraternal organization?

What records would result?

Check the appropriate sources.

You are leaving a hole in their life story if you don't.

That could stop you, or mislead you. It is especially important if you are dealing with two people of the same or similar name living in the same locality. Then you must consult every possible record, to be able to build a solid picture of each individual and to separate the two. This can sometimes result in some wonderful finds, things you might not have otherwise sought. For example, for an ancestor who served in the War of 1812, I did not settle for just the record of his service and pension from the National Archives. I searched further and located and obtained a copy of a claim he filed with the state for reimbursement of personal costs associated with his service. In that record, the ancestor, who was born in 1794, named his father. It was a wonderful find, and is the only document we have which conclusively links him to his father.

**Get to the original source record whenever possible**

Don't settle for a transcription or published version. We found a previously unknown marriage, and subsequent divorce in 1814, when we examined the original marriage registers of one county. This had been overlooked by many other researchers working on the same family, because all of them had relied on one of the three published versions of this county's marriage records, each of which were based on a flawed 1930s transcription. The bride's name was incorrectly transcribed in the 1930s, and the record 'lost' to researchers as a result. Nobody recognized it.

Microfilm is fine; at least you will be able to see an image, to interpret the details. Make your own determination.

If you are accepting someone else's conclusions, realize that they could be wrong. If so, everything you build on that information is could collapse.

**Important** — When you write or speak about the family, be sure to present anything which is uncertain, questionable, or speculative as such. Tell how you reached your conclusion and the sources used. This is critical when you publish. It is okay to present a theory, as long as it is abundantly clear that it is just that. You may have worked for years and simply not found the exact record to resolve a particular issue. But you know everything that has been checked, and may have a strong inclination as to what is correct. You can present a small essay to that effect, and give future researchers a head start if they want to pick up where you left off. Just be absolutely certain you make clear that this is supposition or theory, not yet documented.

### **Use of printed versus original**

Use printed source materials as means to get to the end, not as the end in and of themselves. You can consider them to be an index to get you to the original. Always try to see the original record, which may contain more information than a database entry or a published extract or abstract.

#### *GOAL:*

To see the original record, or the nearest version possible, and to make your own determinations based on that record and others you gather.

### **Primary versus secondary**

This is the subject of full lectures on its own ... there are numerous articles on the subject. I urge you find and read one or two of those to increase your understanding.

Bear in mind: The more that secondary sources are used as building blocks, the more diluted and garbled the facts become.

Erroneous or incomplete secondary sources introduce conflict. It is essential that you work with primary sources whenever you can to avoid this. Always try to see the original version of any record, to draw your own conclusions and avoid transcription errors and omissions.

### **Accessing primary sources**

Much primary source material is difficult to access.

Don't let that stop you – take it as a challenge.

Seek out finding aids, such as bibliographies in libraries, then use primary sources.

Important---

Study the source as you use it. Look at layout, format, type of information generally presented in each entry. Be alert to inconsistencies, changes, omissions.

### **Indices — your best friend or your worst enemy**

How does a genealogist read a book? From the back to the front . . . because they usually start by looking for an index at the back.

Some authors of genealogical books don't believe that they need to index a book. I have a hard time understanding such thinking. Many researchers, faced with a book without an index, set it aside and go on to the next one.

I believe: Every good book deserves a full index.

New indexes uncover hidden names (wives, children, officers, brothers, etc.)

Be alert to these index problems or challenges

Multiple indexes, (I once found 11 in one book)

Buried indexes; not at the back of the book. Sometimes an appendix or other material added at the back may push the index forward into the book. This is even worse when the appendix resembles an index in layout, and you may think you are looking at the index. This problem

also happens when libraries bind multiple volumes together as one. The index you look at in the back of the resulting book may only cover only one-half or less of the content. Another index (or two) may be further forward in the book, at the end of the volume or section it covers.

Unexplained indexes. This is a typical situation when the entries from the index don't work at first try, and no guidance is found on the page. Look at the beginning of the index for an explanation, or at the forward or introduction of the book itself. It is common in books which are transcription of original source material, preserving the page numbering from the original, and indexing by that rather than the pagination of the transcription book.

Partial or supplemental: this may only index some of the names. A prime example is marriage books, when the authors alphabetizes by the groom's name, and then adds a cross-index to the brides. If that index is surname only, you may not realize that it does not cover all of the names.

Alphabetized instead of indexed. I have seen marriage books and cemetery books alphabetized, only, with no index. This is quite unfortunate, in several respects.

Only alphabetized by first letter. This usually occurs in much older books, and courthouse record volumes. You need to take note of the arrangement and search accordingly.

Russell System and others like it. Several new, commercially developed formats of indexing were marketed in the late 19<sup>th</sup> century, particularly to courthouse record keepers faced with increasingly large quantities of names. Look at the top of the page or the front of the book for explanation on how to use these. Be alert to the fact that some clerks did not understand them, and occasional entries are in the wrong place. A number of articles have and booklets have been published about these special systems. One is: *Courthouse Indexes Illustrated*, by Christine Rose (CR Publications, 2006).

Study and determine what an index covers, and how it is organized.

Ask yourself this question: Is it really the index?

Also, when dealing with court and land records always consider these:

Where clerks cluster things You may find all records of a certain type, such as naturalizations entered in court minutes, grouped together in one place in the index.

Where things are hidden: Perhaps the clerk decided to 'hide' entries for adoptions, rather than putting each under the names involved. Some entries have been found indexed in 'I', as "In re:" followed by the name(s), or in "A" under "Adoption of..."

Carryover. When the allotted page for the letter of the alphabet is full but the volume is not, the remainder of the entries are usually carried over to an empty page elsewhere in the volume, with a notation that effect at the bottom of the full page. Sometimes that note is missing. If so, look at the front of the book, or search less-used letters, such as I, K, Q, U, X and Z.

### **Cemeteries: varying approaches, results, uses.**

Seek out and use all possible finding aids. Even a guide to cemetery locations in a county can be helpful, as it may provide information about the founding, earliest burials, or relocated graves. Those particulars may be missing from a published listing.

Look at every possible version. Each has value. Older readings may have stones which have since disappeared or weathered to an unreadable state. Newer readings may have added stones and perhaps even older ones which were missed or covered over on the previous reading.

Always try to find one in order. This preserves the relationship of the stones in a plot, which may suggest relationships.

Look at others in the cemetery; don't grab a copy and run. Copy full listing if practical. You may find that other relatives are buried there, later, as you identify more family members or document marriages. You will want the list to consult.

### **Pursue Bible records**

These are especially valuable in the time before modern vital records.

Many have been published. E. Kay Kirkham compiled two major listings in the late 1970s and early 1980s, for D.A.R. Bible records collections which had been published to that time, working from microfilm at the Family History library. (*An Index to Some of the Family Records of the Southern States: 35,000 Microfilm References from the N.S.D.A.R. Files and Elsewhere*, by E. Kay Kirkham; Logan, UT: Everton Publishers, 1979 –and– *An Index to Some of the Bibles and Family Records of the United States: 45,500 References as Taken from the Microfilm at The Genealogical Society Of Utah*, by E. Kay Kirkham; Logan, UT: Everton Publishers, 1984)

While dated, these are still of value to help with those records. The library catalog at the online site of the Daughters of the American Revolution is helpful to locate additional records of this type. Referred to as the GRC (Genealogical Records Committee), this collection consists of over 20,000 typescript volumes compiled over the years by local D.A.R. chapters. An online index is searchable at [http://216.36.105.133/DAR\\_Research/search](http://216.36.105.133/DAR_Research/search)

Also search for Bible records which have been published in periodicals. Do this by conducting a search for the surname in PerSI (Periodical Source Index) in Heritage Quest online. Check with your local library for access. If the surname search results in too many hits, add the keyword, "Bible".

### **Be as organized as possible**

Organized (my definition):

Being able to quickly and easily find any item of information or source material you have, whenever you need it.

Some researchers use binders, others organize in various ways in file folders. Still others try to handle most information through a genealogy database program and other electronic files. Find or develop a system which works for you, and use it. It will reward you many times over for the effort.

### **Avoid the bulging notebook syndrome**

Select and limit what you carry. Don't tote around a lot of excess paperwork and weight. It is a nuisance to carry and cumbersome to search through.

Best policy: Always keep originals at home, and only take copies with you.

Never—ever—carry original documents or photos with you on research outings. Make copies!

I suffered a major loss this way 38 years ago, as did a friend about 10 years later. And I have seen a number of irreplaceable, original photographs and documents in "Lost and Found" at our library, items which should never have been carried around in a notebook or folder.

### **Chart to sort and see information**

This presents findings in an orderly fashion.

Makes it clear where gaps exist.

Points out inconsistencies or conflicts of information.

Helps make relationships apparent.

Pedigree charts, family group sheets, timelines/chronologies: each can be helpful

Many genealogy computer programs will generate these from your compiled data.

### **Consider what will become of your research**

This is sensitive, but an essential consideration.

Make arrangements now for what will become of your research when you die or are incapacitated.

Be certain the intended recipient (either a relative, a fellow researcher, or a library or society) is receptive.

Make several key people aware of your plans and wishes.

Consider including a provision in your will, or leaving a separate, written directive which is referenced in your will and filed in a safe place. That allows changes from time to time.

A number of years ago, articles were published on this topic in some genealogical periodicals.

Those advised that you place a prominent label on file cabinets, notebooks, computers, etc., indicating that directions existed for disposition of these materials, and stating where to find the information.

Much has been lost because no one thought to provide for this need, and others considered the research notes and associated materials to be trash, and treated it as such.

### **Above all, as you pursue this pastime:**

Enjoy the experiences –

meet people along the way –

learn about your family and their times and lives.

Genealogy can be your passport to a great deal of enjoyment... I hope these ideas and suggestions will make it a smoother journey for you.