Module 1 - Foundations

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Module 1: Foundations

November 3–9

Readings: Board for Certification of Genealogists (BCG). *Genealogy Standards.* 2nd ed.

- Pages xix-xxii
- All of chapter 1
- Chapter 2, Standards #1-6
- Chapter 3, the introductory paragraph on reasoning from evidence on p. 23 and Standards #37-40
- The Evidence Analysis Process Map inside the back cover
- Glossary as needed

Powell, Kimberly. *The Everything Guide to Online Genealogy.* 3rd ed.

- Chapters 1-3, note critical typos on pp. 32 and 46

Discussions: Please post your **Introduction** as soon as possible.

Discussion 1 postings end Monday, November 9 at 11:59 PM ET

Assessments: **Course Navigation Assessment** due Friday, November 6 at 11:59 PM ET

Module 1: Family Group Sheet due Monday, November 9 at 11:59 PM ET

Note: Access to discussion forums and assessment ends on Monday, November 16.

Lesson 1: Genealogy Basics

Overview and Objectives

Welcome to Module One of Genealogical Principles!

This week's module, Foundations, has three units:

1. Genealogy Basics
2. Standards
3. The Tools We Use

You should start with the first unit and read it page by page. Don't forget to use the Table of Contents (on the left-hand side of the screen) to make sure you have expanded all the plus signs, otherwise you may skip critical sections. After you have completed the first unit, proceed to the second and so on. Along the way you may be asked to access some free websites or you may be asked to print off a form or document in order to complete an exercise.

Activities, exercises, video lessons, discussion boards, and assessments are scattered throughout the course content to enrich your learning experience.

During each week, you may proceed through the material at your own pace. Graded activities must be completed by their respective due dates for their scores to count toward your final course grade.

Each week a new unit will become available to you on the course home page. The previous units' material will remain open for your reference.

Using *FamilySearch*

One online record provider that we'll be using frequently is *FamilySearch* (https://www.familysearch.org/). Some of you are already familiar with this website and all it has to offer; some of you are familiar with parts of the site; and for others, using it will be a new experience. By the end of the first few weeks you will all have a good working understanding of the many substantial resources at *FamilySearch*.

FamilySearch claims (with good reason) to be the largest genealogy organization in the world and is associated with The Church of Jesus Christ of Latter-day Saints (LDS, also called Mormons). The *FamilySearch* website and its millions of records and educational materials are free for anyone, but access to it requires creating a free account on the site. You can quickly and easily create your free account by clicking "Create Account" in the upper right corner of the *FamilySearch* home screen. There are links to pages for "FamilySearch Terms of Use" and "Privacy Notice" on the very bottom of that same home screen.

Occasionally students have expressed concern that creating an account on this site will result in spam, or unwanted emails, or proselytizing. None of these things will happen. Creating a new account now also creates a family tree populated with your name. If you do nothing with this tree, it remains unsearchable and unseen to anyone other than yourself.

Module One Focus

Beginning genealogists often assume that any record they find is accurate. You will begin your studies by looking for records about yourselves. These activities will demonstrate how thorough and critical we must be when examining information about or by our ancestors.

Next, we'll introduce you to the course touchstone, the Genealogical Proof Standard (GPS). You'll learn some specific terms used by genealogists when describing a source and analyzing the information it contains—the beginnings of the critical analysis essential for doing quality research.

We'll look at the reasons behind the emphasis on citing our sources, learn the pattern underlying most citations, and examine examples

Organization is an important skill in genealogical research. In this first week you'll see examples of tools we use and have an opportunity to practice using one of them. Additional charts and methods of organizing information and research results will be presented throughout the course.

Learning Objectives

Upon completion of this module you should be able to:

- Define "genealogy"
- Define "source" and "information"
- Explain the difference between a source and information in a source
- Differentiate between source categories
- Differentiate between information categories
- List the five components of the Genealogical Proof Standard (GPS)
- Explain the importance of the first two components of the GPS
- Understand and reproduce some basic models for creating citations for footnotes

What is Genealogy?

A quick look in any dictionary or online search engine will show various definitions for genealogy. Some, with a focus on identifying one or more lines of descent, might evoke simply the collection of names of people and the associated dates and locations of birth, marriage, and death. The field of genealogy is much more complex:

> Genealogy is the study of identity and kinship.

Modern family historians and genealogists go beyond the "hatch, match, and dispatch" of vital records to place our ancestors in the context of the times and places in which they lived. Our ancestors and their actions were governed by the social customs and legal rules of their day. We identify them, determine their relationships, and tell their stories through the variety of records they left behind, against the background of their economic, political, religious, and social lives.

Begin with Yourself

Classical training in genealogy has you start with yourself and use what is near at hand to establish a solid foundation. Due to changes in technology, what is "near at hand" has expanded. We still create the same types of paper documents that past generations did: birth, marriage, and death records; deeds and mortgages; wills; employment records; newspaper articles; military records; identification papers; and contracts. In addition, we now leave electronic tracks of our lives in records displayed online, in postings on social media sites and discussion groups, and in search engines that collect and correlate information from all over the Web.

Leaving Tracks Activity

Goal: Using multiple web sites, search for information about yourself that is available for free. Determine if it is accurate or analyze how it might have become misconstrued.

It's easy for this activity to draw us into interesting places and become time-consuming. Please limit your search time to 20-30 minutes. The number of the sites you can visit in that amount of time will vary, depending on how common or unique your name is, your age (i.e., the number of years you have been creating records), the number of places you have lived, and so on.

1. Select at least three of the websites in the list below and enter your own name in the search box(es). Note: If you have a very popular name, you might also want to limit the search to the state you live in.
2. What information about yourself do you find on each site? Create a chart and record the information that you find. The chart is for your own use—we won't be asking you to submit it.
3. When you have completed this activity, take a few minutes in the following discussion board to reflect on what you have discovered:
    - Did you find facts of which you were unaware?
    - Was there misinformation about you online? If so, can you reason out how this misinformation came about?
    - Was your name misspelled consistently? If so, can you track back to the first time that happened?
    - Did you encounter information about someone else with the same name as yourself? If so, how easy would it be for a third party to confuse the information about the two of you?

Here are the sites, and some of the information you might find on each.

Note

A number of these sites will show some information for free but will want to sell you access to [possible] additional information. We do NOT expect you to: subscribe or pay a fee to any of these sites; create an account, register, or otherwise sign in to any of them; or download anything to access the free information on any site. If you feel uncomfortable using a particular site, please skip that one.

- *Intelius*: [age, locations, relatives, employers, schools, partial phone numbers]
- *Missingmoney*: "States and provinces working together to return your lost funds": [Do you have unclaimed money? Every term, there are students who find themselves on this list.]
- *Zillow*: "Reimagine home": [Look up your home address]
- *PeekYou*: "Free People Search Made Easy": [age, locations, information from social media sites, online discussion groups, and more]
- *FastPeopleSearch*: "Find People Fast & Free!"
- Social media site(s) of your choice: *Facebook*, or use a search engine with the terms "facebook" plus your name; *LinkedIn*; *Twitter*; or others. [How many other people are tagging you? Are you a backdoor to someone else's page?]

Web Observations

As a 21st century genealogist, you will be using the Web to find and confirm information. Hopefully, the activity you just completed has made you more cautious about taking everything at face value. This course will help you learn how to evaluate what you find. In the meantime, remember:

- Not every source is correct; we must be critical of things in print.
- Associates can be an indirect path to information about a person, making them powerful tools in research.
- We will encounter multiple people with the same name in our research.
- There's more to genealogy than just births, marriages, and deaths!

Discussion 1: Leaving Your Tracks

Go to the discussion board and comment on these questions.

Discussion 1: Leaving Your Tracks

- Which sites did you visit?
- Did you find any surprises in your search for information about yourself?
- How will this exercise change your approach to searching for or evaluating information when you're doing future genealogical searches?

Your Paper Records Activity

Let's return to the traditional records created on paper (and increasingly today, also in databases) that you have produced in your own lifetime. In ten minutes or less, write down every record that you can think of that documents your life in some way.

Look over your list.

1. Did you include birth and baptismal certificates, marriage and divorce records?
2. Federal identification records such as passport, Social Security card, military records and security clearances?
3. State-related records such as driver's licenses, professional licenses, town directories, positions of public office, and deeds?
4. Student records and diplomas?
5. Contracts, newspaper articles?
6. Did you name every congregation you have belonged to? Every medical practice and hospital where you were a patient?
7. Did you include records about someone else, on which your name appears: records your children create that ask for parents' names; or records in which you were a witness, such as a marriage or christening?
8. Don't forget business records: your own, or those of others. Are you a teacher who has appeared in the school yearbook annually for twelve years? Does your name appear in your employer's reports or advertising materials?

Finally, are there mementos and personal items that tell part of your life story? This category includes items such as journals and diaries, baby books, your wedding invitation and graduation announcement, award plaques, and even needlework. Our sources aren't confined to paper and

official documents; there are many artifacts that help us flesh out life stories.

Memento Example

“My sister gave me a jewelry box of items to sell in my garage sale. In it was a locket that I recognized as belonging to my dad's cousin Charlie Borelli. But how did it get there? Up to that point all I had was Charlie Borelli's tombstone photo. When he died in an auto accident in 1940, I can imagine that the locket was given to his brother Angelo, who lived with my grandmother. When Angelo and my grandmother died, my sister must have gotten the jewelry. Because of this chain of events, I now know that Charlie was a member of the I. O. O. M. and that the people pictured inside the locket were probably his parents. Every little bit helps contribute to the family story—and to think this was almost thrown away!”

Charles Borelli's grave marker

Photograph by Elissa Scalise Powell, CG, CGL and used by permission.

Locket Front

Locket Back

Locket Inside

Photograph by Elissa Scalise Powell, CG, CGL and used by permission.

Record Recap

As with you, so with your ancestors. The events and interactions of their lives produced a number of documents and other items that carry information about them. These sources of information were created and preserved in a variety of locations; some remain in the same spot where they were deposited, others have been moved or passed on to other people or institutions, and still others have been lost or destroyed.

Oral History: Relatives and Friends

Other important sources of information may be just a phone call or visit away. Don't forget to talk to people who were present at or tangentially recall events of the past. Seek out relatives to ask about the family history and remember that they don’t have to be older to contribute their perspective of the family history. People might claim that they do not know much; but sharing photos, asking about holidays, or reviewing

publications about historical events of their lifetime (or their parents' lifetimes) can start the stories coming. What they do know can be brought together with other sources to create a more complete picture of a family or an individual.

Always document these conversations: note who was telling the story or providing information to you, the date, the location, the event (if pertinent—for example, a family reunion), and the medium of communication (in-person conversation, phone call, email, letter, etc.). Also note the means of preservation (audio/video recording, your notes saved in a file, etc.). Succinctly adding details about the interviewee's knowledge as it affects reliability can be important—her or his age and apparent mental acuity might be helpful ("ninety years old and sharp"); the relationship to some of the persons discussed; or any known bias ("never felt accepted by in-laws and still angry about it"). Documentation is one of the standards of quality work and will facilitate best analysis of the information, whether that analysis is done by you or later by someone else. Using a standard form can ensure that you collect important data; see for example the one at *DoHistory*.

A citation could follow this pattern:

> [Name of person interviewed (her/his address)], interview by [Your Name], [date of interview]; [format and location of documentation]. [Any necessary details about the quality of the information].

An example of a finished citation based on that pattern:

> Jane Jackson (123 Arcadia St., Smalltown, State), interview by John Jacobson, 23 April 2012; audio recording in electronic files of John Jacobson, 345 Green Lake Rd., Urbanville, State. Jane Jackson, age 89, spoke about her great-grandmother Adelia (Smith) Jacobson, with whom she had lived between the ages of three and eight. Jane's memories of her childhood seemed sharp.

The same pattern can be used for any personal communication—just replace "interview" with "phone conversation" or "email" or whatever best describes the exchange of information, and how it has been preserved.

There are many excellent resources on oral history; some are more focused on interviewing for purposes of cultural history rather than family history, but the advice is still pertinent and valuable. For more information on how to conduct a family interview, see the following links:

- "50 Questions to Ask Relatives About Your Family History," by Kimberly Powell
- "Interviewing Mom and Grandma: Oral History Tips," by Sharon DeBartolo Carmack
- "Oral History Techniques: How to Organize and Conduct Oral History Interviews," on the website of the Center for Oral History and Memory
- You'll find more suggestions at Cyndi's List, in the category for "Oral History & Interviews"

Think ahead of time about how you will record your interview. Smart phones can be used if you don't have fancier equipment:

- "DIY Resource: How To Record High-Quality Sound With Your Phone"
- "Connect Any External Microphone to your iPhone with a Powered USB Hub"
- "5 Must-have Apps for Recording Meetings, Interviews and Phone Calls" (requires free registration to read the whole article)
- Story Corps offers a free mobile app with a user guide and interview tips
- If you own an Apple iPhone, try searching the Macworld web site (www.macworld.com) using terms like "audio recording app review," or in general, use Google with similar terms such as "best smartphone setup for audio interviews."

Ask family members about photographs, scrapbooks and family papers; in addition to the information they explicitly contain, they can prompt more memories and stories. If you have the opportunity to copy these sources digitally or photographically, assure your relatives that you are only interested in making copies and not taking their items—people can be very protective of what has been entrusted to them. This goes for artifacts and heirlooms as well as documents. Taking photographs of the items and learning their history will enhance the family's story. These items may also give credence to stories or yield clues of their own. Examine them closely for signatures, dates, and other telling signs of usage or wear. For example, something as simple as noting which pages of a prayer book have corners that are worn or browned from a thumb repeatedly holding the page open can indicate which prayers a former owner found especially meaningful. Search online for "scanning apps" and "scanning apps genealogy" for a variety of suggestions for apps and tips. See again Cyndi's List.

Think broadly and creatively about what and where family information might be found. You'll find helpful ideas in a genealogical source checklist; enter a phrase such as "genealogy research checklist" into a search engine or take a look at the one offered at *Magnolia Manor Genealogy*.

Our Ancestors in Context

Earlier we noted:

"Our ancestors and their actions were governed by the social customs and legal rules of their day. We identify them, determine their relationships, and tell their stories through the variety of records they left behind, against the background of their economic, political, religious, and social lives."

We study contextual material, that "background of their economic, political, religious, and social lives," for at least three reasons:

Understanding the context of our subjects' lives **directs us to sources** of information about their basic life data, their relationships, and events that affected them or in which they participated. For example, who could and could not file for a military pension? What supporting documentation or information was required? What kinds of records might be included depending on what the applicant needed to prove? Examples of publications that point us to sources:

Greenwood, Val D. *The Researcher's Guide to American Genealogy*, 4th ed. Baltimore: Genealogical Publishing, 2017.

Rose, Christine. *Military Bounty Land: 1776-1855.* San Jose, CA: CR Publications, 2011.

Wynne, Suzan F. *Finding Your Jewish Roots in Galicia: A Resource Guide.* Teaneck, NJ: Avotaynu, 1998.

Minert, Roger P. *German Census Records 1816-1916: The When, Where, and How of a Valuable Genealogical Resource.* Orting, WA: Family Roots Publishing, 2016.

Homberger, Eric. *The Historical Atlas of New York City: A Visual Celebration of 400 Years of New York City's History*, revised and updated. New York: Holt Paperbacks, 2005.

Footnotes or endnotes in history books or articles are a treasure trove of pointers to source material, both original records and other authored narratives.

Learning about context helps us **understand our sources** and **correctly interpret the information we find** as well as discern nuances and hints. Examples of publications that illustrate deep understanding of records and their information include:

Spraker, Christopher M. "The Lost History of Slaves and Slave Owners in Billerica, Massachusetts, 1655-1790." *Historical Journal of Massachusetts* 42 (Winter 2014): 108-141.

Zappia, Natale A. *Traders and Raiders: The Indigenous World of the Colorado Basin, 1540-1859.* Chapel Hill: University of North Carolina Press, 2014.

Newman, John J. *American Naturalization Records, 1790-1990: What They Are and How to Use Them.* North Salt Lake, Utah: Heritage Quest, 1998.

Smith, Marian L. "Manifest Markings: A Guide to Interpreting Passenger List Notations." *JewishGen Inc*. http://www.jewishgen.org /infofiles/manifests/ : 2018.

Brown, Jerald E. and Donna-Belle Garvin. *The Years of the Life of Samuel Lane, 1718-1806: A New Hampshire Man and His World*. Hanover, NH: University Press of New England, 2000.

Context allows us to **add color and detail to our subjects' lives** without sacrificing accuracy. An example of this done well, complete with source citations for context such as weather on the day of an event being described:

Coletta, John Philip. *Only a Few Bones*: *A True Account of the Rolling Fork Tragedy and Its Aftermath*, New Edition. Washington, D.C.: Direct Descent, 2015.

Lastly, studying contextual material is **fun**!

Lesson 2: Standards

Introducing Standards

Terminology

Standards in any arena offer structure, guidelines, and rules which shape expectations. People expect car drivers to stop at a red light. AAA batteries are expected to be a certain size. We expect restaurants to serve food that won't make us ill. If standards are not followed, results are haphazard.

Genealogy is no different. There are standards in notation, data collection, evaluation, and writing. The consequences for not following genealogical standards may not be as dire as those for running a red light, but they do create "brick walls" or lead to error-riddled family trees. Genealogy standards are the measure by which people can guide their research, evaluate their own work, or judge the reliability of others' research, whether it be a family tree on a website or an article in a genealogical journal. These standards, explained in *Genealogy Standards* published by the Board for Certification for Genealogists, should be learned and practiced by every genealogist.[1]

As in other fields, the standards of genealogy include its own terminology which you'll encounter in discussions, lectures, books, and journal articles; some of the terms differ from how they are used in other fields or in everyday speech. Perhaps the most important terms are those we use for standards of categorization and evaluation: *source*, *information*, and *evidence*; *original*, *derivative*, and *authored*; *primary*, *secondary*, *undetermined*; *direct*, *indirect*, *negative*; and *independent*. Using a common terminology enables us to describe our research, communicate how we successfully solved a problem, and formulate our questions in precise ways that allow other genealogists to assist us.

[1]Board for Certification of Genealogists (BCG), *Genealogy Standards*, 2nd ed. (Nashville, Tenn: Turner Publishing, 2019).

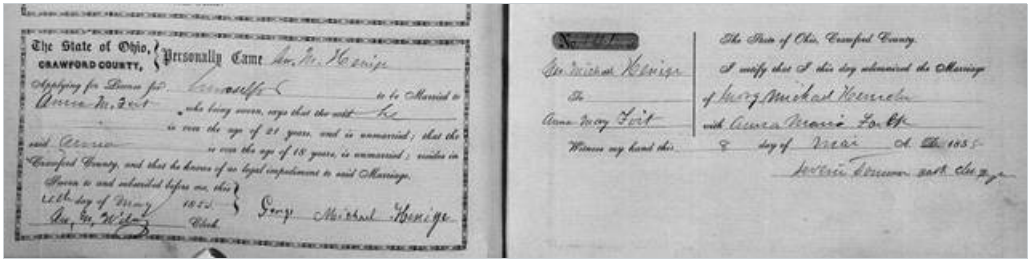
Standards and Terminology: Examining Sources

Why do we need to evaluate the sources we use? Can't we just trust that the information in a marriage license, for example, is correct? You likely saw in the Leaving Tracks activity that inaccurate information abounds and even appears to replicate itself, and it is sometimes tempting to think that those errors occur only outside of official or certified records. But consider the example of applying for a marriage license. The bride and groom each contributed information; a clerk recorded it. Did the clerk hear the couple's answers correctly? Did the couple have reason to lie about their ages—a too-young bride, a "too old for her!" groom? Or conversely, a bride who wanted to hide the fact that she was a few years older than her groom? Did the law even require that both parties appear for the license? If a parental affidavit was included, did the parent have a reason to lie or exaggerate her or his relationship? For the marriage records themselves, did the officiant (clergy or Justice of the Peace) record his paperwork promptly or did he do it months after the event?

Access Images on FamilySearch.org

Click image to see entire page on which this record appears. You will need to sign into FamilySearch.org if you are not already in the website.

Marriage records 1831-1929, Crawford County, Ohio



Click the image to see the entire page.

Crawford County, Ohio, Marriage Record No. 5 1854-1860, p. 36, Henige-Foit [sic]; Crawford County Probate Court, Bucyrus, Ohio; digital image, "Ohio, County Marriages, 1789-2013," *FamilySearch* (https://familysearch.org : accessed 4 January 2018), Crawford marriage records 1854-1860 vol. 5, image 101.

- How many ways does the groom's name appear in this license and certification of marriage?
- How many ways does the bride's name appear?
- Who signed these two documents?
- Who did not sign?

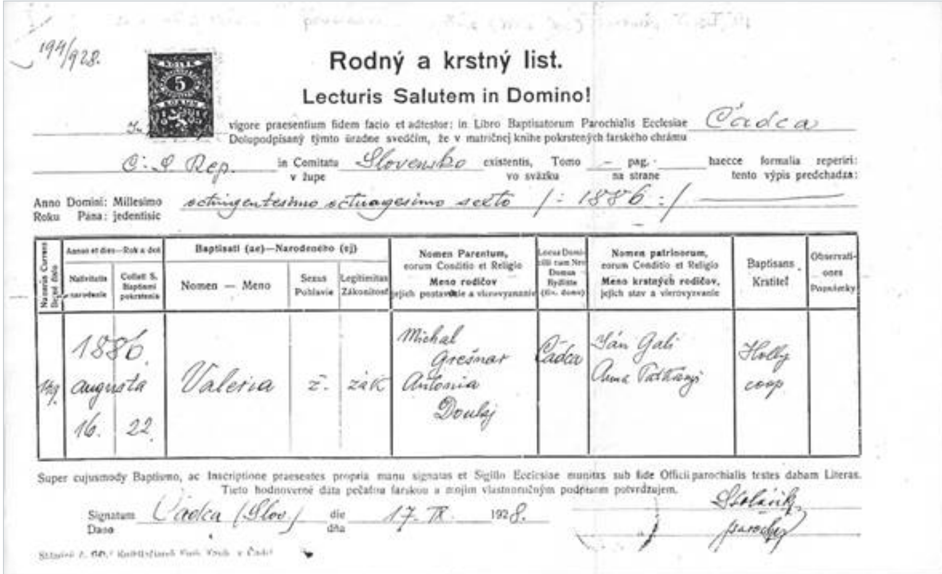
When examining a document, we need to ask ourselves whether we're looking at a record in its original (earliest) form, such as a will with signatures of the testator and witnesses (or a complete digital image of it), a transcribed copy, or a new document with information extracted from the original. Compare the following two records which document one person's baptism.

Baptisms, marriages (Krsty, manželstvá) 1742-1896

Click the image to see the entire page.

St. Bartholomew Roman Catholic parish (Čadca, Slovakia), Rodna [births, baptisms] 1 January 1874–23 January 1891, for Valeria Gresnar baptism, 1886; digital image, *FamilySearch* (https://familysearch.org : accessed 4 January 2018) > "Slovakia, Church and Synagogue Books, 1592-1910," > Roman Catholic (Rímsko-katolícká cirkev) > Čadca > Čadca > Baptisms, marriages (Krsty, manželstvá) 1742-1896 > image 480.

Valeria Grešnar Baptismal Certificate 1928



194/928.

Rodný a krstný list.

Lecturis Salutem in Domino!

vigore praesentium fidem facio et adtestor: in Libro Baptisatorum Parochialis Ecclesiae Čadca
Dolupodpísaný týmto úradne svedčím, že v matričnej knihe pokrstených farského chrámu

Č. S. Rep. in Comitatu / v župe Slovensko existentis, Tomo / vo sväzku – pag. / na strane haecce formalia reperiri: / tento výpis predchádza:

Anno Domini: Millesimo / Roku Pána: jedentisíc octingentesimo octuagesimo sexto /: 1886 :/

Numerus Currens / Bežné číslo	Annus et dies—Rok a deň: Nativitatis / narodenia	Annus et dies—Rok a deň: Collati S. Baptismi / pokrstenia	Baptisati (ae)—Narodeného (ej): Nomen — Meno	Sexus / Pohlavie	Legitimitas / Zákonitosť	Nomen Parentum, eorum Conditio et Religio / Meno rodičov, ich postavenie a vierovyznanie	Locus Domicilii cum Nro Domus / Bydlište (čís. domu)	Nomen patrinorum, eorum Conditio et Religio / Meno krstných rodičov, ich stav a vierovyznanie	Baptisans / Krstiteľ	Observationes / Poznámky
149.	1886. augusta 16.	22.	Valeria	ž.	zák.	Michal Grešnar Antonia Doulaj	Čadca	Ján Gali Anna Patkányi	Holly coop.	

Super cujusmody Baptismo, ac Inscriptione praesentes propria manu signatas et Sigillo Ecclesiae munitas sub fide Officii parochialis testes dabam Literas.
Tieto hodnoverné dáta pečaťou farskou a mojím vlastnoručným podpisom potvrdzujem.

Signatum / Dané Čadca (Slov.) die / dňa 17. IX. 1928.

Stolárik, farár

Click image for a higher resolution image.

Valeria Grešnar baptismal certificate (22 August 1886 baptism); issued 17 September 1928, Čadca Roman Catholic Parish, Slovakia; photocopy in research files of Julie Michutka. Used with permission.

- When was the baptismal *register entry* created?
- When was the baptismal *certificate* created? (Look carefully!)
- Why are the father's and godfather's first names spelled differently in the two records?
- Do you feel that you can transcribe godmother Anna's surname accurately? If you can, what aids you? If you can't, what prevents you, and how might you get around that stumbling block?

Let's return to terminology, and the concepts it signifies.

Sources are those documents, stories and recordings, books, photos, and personal items that tell us about the people, places, and times we are researching. Genealogists classify any given source in one of three ways: original record, derivative record, or authored narrative.[1]

- An *original record* is in its first form: a handwritten letter, a document signed at the time of a transaction, a family story told by someone who participated in or witnessed the events she is telling, or an artifact such as a cross-stitched sampler with the needleworker's name and date. Image facsimiles (microfilm, photocopy, digital image), if complete and unaltered, can usually be evaluated and used as if they were the physical source of which they are an image.
- A *derivative record* is a copy or re-working in some way of an original record. You might think of it as a sort of second-generation source: there's always a parent, that original source, behind it, from which the derivative record was made.
- An *authored narrative* "synthesizes information from many prior sources" *and* "presents the writer's own conclusions, interpretations, and thoughts."

Which of the above images is of an original record, and which derivative? Can you explain your answers?

[1]See the glossary of *Genealogy Standards* for each term, as well as "source."

Source Self-check

Source Self-check Activity

This activity will help you differentiate between original records, derivative records, and authored narratives.

Instructions

Follow the links to examine each item and determine whether it is an original record, a derivative record, or an authored narrative. In each case, make your assessment as if you have the physical item in front of you, rather than just the image, unless it is a "born digital" item. You will need to be logged in to *FamilySearch* and *AncestryLibraryEdition* to access some of the images.

1. Letter by Mary Lincoln regarding the estate of her late husband.

   Choose the best answer.

   original record

   derivative record

   authored narrative

2. Letter by Mary Lincoln regarding the estate of her late husband.

   Choose the best answer.

   original record

   derivative record

   authored narrative

3. "History of Lothair Community," in *Our Heritage in Liberty*, pages 249-66: as if holding the physical book in your hands.

   Choose the best answer.

   original record

   derivative record

   authored narrative

4. "History of Lothair Community," in *Our Heritage in Liberty*, pages 249-66: consulting the digital copy online.

   Choose the best answer.

   original record

   derivative record

   authored narrative

5. Jerom Ripley in the 1800 federal census of Greenfield, Hampshire County, Massachusetts.

   Choose the best answer.

original record

derivative record

authored narrative

6. "Rigoberta Menchú: Guatemalan Activist," in *Encyclopaedia Britannica*, online.

Choose the best answer.

original record

derivative record

authored narrative

7. Letter, Patrick Blundstone to his father, September 1916 (multiple images).

Choose the best answer.

original record

derivative record

authored narrative

8. Letter, Sergeant-Major James Milne to his wife, July 1918.

Choose the best answer.

original record

derivative record

authored narrative

9. "Rafael Arriaga, a Mexican Father in Michigan: Autosomal DNA Helps Identify Paternity" by Karen Stanbary, CG, originally published in the *National Genealogical Society Quarterly* 104 (June 2016), pages 85-98.

Downloadable PDF at BCG: Genealogical Work Samples.

Choose the best answer.

original record

derivative record

authored narrative

Remember, determining whether a source is an original record, a derivative record, or an authored work is a tool rather than a goal in itself. These distinctions help us answer the question, “do I have the earliest/best quality source(s)?”

Standards and Terminology: Examining Information

Examining Information

Information is what we find in a source: those bits that carry meaning for us in our quest to learn about our ancestors. In genealogy, we differentiate between *primary information*, *secondary information*, and *undetermined information*. Primary information is that given by someone with first-hand knowledge of what she reports or records. Secondary information is that given by someone more removed from what she reports. Undetermined information is that for which we don’t know whether the knowledge is first-hand or not, or for which we cannot confidently identify who reported the information. Because of this distinction, it is usually important to identify the *informant* for any given item of information.[1]

Identifying an informant and how she knows any given item of information allows us to add shading to the information’s likely accuracy.

Some important points:

- A source can contain many items of information—and some could be primary, others secondary, and still others undetermined.
- A source can contain information from more than one informant.
- Any given informant might have firsthand knowledge about some of the information she is offering, but secondhand knowledge about other information, all in the same source.

[1]See the glossary of *Genealogy Standards* for each term, as well as “source.”

Video: Examining a Record

The use of specialized terminology in genealogy reflects our emphasis on evaluating our research materials. By looking at a source with a critical eye and asking whether there is an earlier version, and by identifying an informant and weighing her knowledge of the information she offers, we ensure that we are gathering the most accurate data possible.

Understanding genealogical terminology also provides a common frame of reference. We can more easily join in the ongoing conversations of the field in local genealogy society meetings, in online discussion groups, and in reading the exchange of ideas and stories in genealogy publications.

Note

Before watching this video, access or print out the death certificate of Nora Belle Hartman. Or download the PDF.

CPE_GEN_Michutka_examining_information video cannot be displayed here

Reflection

If you have access to an ancestor's birth, marriage, or death certificate in your own files or via an online provider, take another look at it, and apply the same sort of source and information analysis. You might decide that some of the information is less reliable than you initially thought, and that you need to examine more sources before you can state that a name, date, location, or relationship is accurate.

The Genealogical Proof Standard

In this course we will be highlighting a particular set of five principles that are collectively known as the Genealogical Proof Standard (GPS). These five principles have been developed as a way to measure whether thorough research and sound reasoning have led to a solid conclusion for a given genealogical question or problem, such as "When was great-grandfather Abel Jackson born?" or "How were Colonel Armstrong and 'Aunt Mary' related?" (We will be re-visiting the latter question in this course.) In other words, these are five criteria that must be met before we can say something in genealogy is "proven." By adhering to this standard, our work has a much better chance of withstanding scrutiny.

Components of the Genealogical Proof Standard

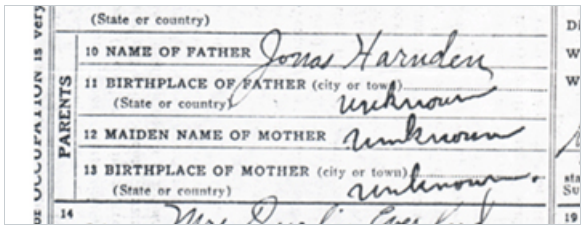
The five components of the Genealogical Proof Standard are:

1. “Reasonably exhaustive research in reliable sources for all evidence that might answer a genealogist’s question about an identity, relationship, event, or situation;
2. Complete and accurate citations to the source or sources of each information item contributing —directly, indirectly, or negatively—to our research question’s answer;
3. Tests, through processes of analysis and correlation, of all sources, information items, and evidence contributing to an answer to a genealogical question or problem;
4. Resolution of conflicts among evidence items pertaining to the proposed answer; and
5. A soundly reasoned, coherently written conclusion based on the strongest available evidence.”[1]

One of the purposes of the second activity of this module, “Your Paper Records Activity,” where you were asked to quickly list as many records as possible which document your life so far, was to give you an idea of the types of sources that might be drawn upon in "reasonably exhaustive research."

Reasonably exhaustive research does not stop with the first source that provides an answer. As you probably found in our first exercise in searching for yourself on internet sites, there is inaccurate information just waiting to be found! Remember Nora Hartman's father named on the death certificate we examined in the video?

Nora Hartman’s death certificate



Names of parents, from Nora Hartman’s death certificate

There was no such person as Jonas Harnden, and time and effort were spent looking for this fictitious name before the truth was determined. To eliminate the chances of coming to a wrong conclusion for a research question, it’s necessary to search for and evaluate anything that might document the answer.

You might have heard that we've "proven" a date of birth (or marriage or death), or a maiden name, or the location of an event, if we can document it with three sources. This is no longer considered (if it ever was) a reliable way to judge that an answer or a conclusion is accurate. It does not take into account that all three sources might be drawing their information from the same informant. It also does not take into account the quality of the sources. Remember our evaluations of *source* and *information* on an earlier page, and in the glossary of *Genealogy Standards*.

[1]Board for Certification of Genealogists, *Genealogy Standards*, 2nd ed. (Nashville, Tenn.: Turner Publishing, 2019). See also http://bcgcertification.org/ethics-standards/; in addition to a more concise wording of the GPS, this webpage offers links to some excellent blog posts and short articles about the components of the GPS.

Documenting Our Work: Citations

The second of the five principles of the Genealogical Proof Standard addresses the need to document our sources:

> We create complete and accurate citations to the source or sources of each information item contributing—directly, indirectly, or negatively—to our research question’s answer.

Or, to re-word it slightly: When we collect information, we always record the details about where it came from.

Why should we cite our sources? Many people will answer, quite rightly, that we cite our sources so that we know where our information came from, and so that others can verify our work by following the same document trail. But a well-written citation will also give the reader (and "the reader" includes you, several months down the road when you're revisiting your research notes) an indication of the quality of the source, that is, whether the source is an original document, a transcription of a document (for example, the “clerk’s copy” of a deed recorded at the county), an extract published in a book, etc. Finally, citing the sources we've used in our research allows us to see, or to demonstrate to others, whether we

have done "reasonably exhaustive research" as required by the first element of the Genealogical Proof Standard.

When do we use Citations?

Citations aren't just for professional client reports! When we care about our work having permanent value, we cite our sources:

- in our working notes (always!)
- in written work such as a report, a biographical sketch, a family history
- on the face of image copies of records (for example, photocopies, printed scans, electronic copies)
- in our genealogy software (for example, Reunion, Legacy Family Tree, Heredis, RootsMagic)

Citations

In-depth instruction in citation composition is beyond the scope of this course. However, we will look at the basic elements of well-composed citations and provide models for some of the most common types of sources used in genealogical research. We'll focus specifically on footnote-style citations rather than bibliography-style citations, because it is the citation format we use most often for written work such as reports, charts, and biographical sketches. You'll see models of bibliography-style citations in the various lists of additional resources provided at the end of each week's course content.

So what does a "complete and accurate citation to the source" look like? You've probably read non-fiction books and journals that have footnotes at the bottom of a page or at the back of the book (where they're called "endnotes" rather than "footnotes"). Sometimes footnotes give the reader a little more information pertinent to something mentioned in the narrative text on the page. Other times the footnotes refer the reader to another publication or oral source from which the author drew her information. This reference in the footnote is a "citation to a source." For example:

> Jack D. Forbes, *Apache, Navaho, and Spaniard*, 2nd ed. (Norman: University of Oklahoma Press, 1994), 25.
>
> Melissa A. Johnson, "Mothers for Sophie (Kanetski) Howe of Scranton, Pennsylvania," *National Genealogical Society Quarterly* 103 (June 2015): 105-13.
>
> Lackawanna Co., Pa., Marriage Licenses, no. 223, Howe-Kanetski, 1927; Orphans Court, Scranton.

The pattern for writing a footnote citation for a print publication such as a book is straightforward:

> [author/creator], [*title in italics*], [(publication information in parentheses)], [page number(s)].

But as you know, in genealogical research we work with a great variety of unpublished sources: documents, photographs, public records of many sorts, church registers, newspaper articles, personal letters and emails, diaries, even an uncle's family stories at last year's Thanksgiving dinner. As varied as those categories are, we can adapt the pattern noted above for many other types of sources. Most of these unpublished sources are unique and found in only one place, and so for them we must add one more important element to a citation: we need to record where we found that source. We'll call that place a "repository," whether that place is a state archives or a few storage boxes of family papers kept under our guest-room bed. We can adapt the pattern above, omitting the publication information (because the source is not published) and instead adding the repository information at the end of the citation:

> [creator of source, if known], [name of source], [specific item, person, or entry], [further info if needed to find the specific record or file]; [repository name, city, state].

Those two patterns might still look a little complicated, and not at all similar enough to each other to see their common underlying pattern. Standard 5 distills the underlying pattern down to five questions:

Who? What? When? Where [is]? Wherein?

The answers to these five questions become the framework of a citation—and often, they're enough for the complete citation. Let's look at the two examples above; we'll need to allow for a little variation in the order of the last two or three items in the pattern:

[author/creator]	[*title in italics*]	[year of publication]	[city and publishing company]	[page number(s)]
Jack D. Forbes	*Apache, Navaho, and Spaniard*, 2nd edition	1994	Norman, OK: Univ. of Oklahoma Press	25
[creator of source, if known]	**[name of source]**	**[date of record—e.g., of event, signing, or filing]**	**[repository name, city, state]**	**[specific item, person, or entry]**
Lackawanna Co., Pa.	Marriage Licenses	1927	Orphans Court, Scranton	no. 223, Howe-Kanetski

Note that the “Who?” component is the creator of the source, not the person of interest (unless of course the person of interest is also the creator!).

Some citation conventions

Besides answering five specific questions in a mostly standardized order, we use certain conventions to aid in communicating information about a source:

- You read in Module 1, “Rules shape expectations. … If standards are not followed, results are haphazard.” Here are a few standards that aid in communicating important information about your source to your reader and also add professional polish to your citations:[1]
- An author’s name is written in the order FirstName LastName; see above examples.
- The title of a publication should be in italics; see the book title in the first example above, and journal title in the second. Websites are also publications, so their titles should also be in italics when you cite them.
- The titles of parts of publications should be in quotation marks: a chapter of a book, an article in a journal or newspaper, a collection or page within a website:
    - “From Slavery to Society: The Jerry Moore Family of Virginia and Pennsylvania,” *National Genealogical Society Quarterly*
    - “Senator Hughes of New Jersey Death,” *Hickory Daily Record*
    - “Copyright and the Newspaper Article,” *The Legal Genealogist*
- We never use both italics and quotation marks on the same title (for example, “*Searching for Your Ancestors*”); this would send mixed messages about the source!
- The titles of *un*published sources are *not* put in italics (because italics mean *this is published* in a citation).
- Cite what you see. The marriage record cited below spells the bride’s last name as “Foit”; we leave it that way in the citation even when we know that the family spelled it “Voith.” A brief sentence of explanation can be added after the citation if the difference would otherwise be confusing to the reader. Likewise, if the indexer of an online collection misread a name or other crucial piece of information, we cite what *we* see on the record itself, and add a sentence explaining how it is indexed. See the example below where the census record image reads John “Holwat” but the index at *Ancestry* says “Holvest.”

    > 1920 US census, McDowell County, West Virginia, population schedule, Adkin Magisterial District, ED 44, sheet 20A, dwelling 382, family 399, John Holwat; National Archives microfilm publication T625, roll 1959. Indexed at *Ancestry* as "Holvest” and “Holwet.”

- Every citation ends with a period, just as every sentence does.
- Publication information is placed in parentheses, in this order: (City, State: Name of Publishing Company, year of publication)
- The repository where an unpublished source resides is the last part of the citation, and it is set off from the rest of the citation by a semi-colon; the order is: Name of Repository, City, State.

Citing sources viewed online

Citing a record that we have viewed online can be a little more complicated. Here's the citation for a marriage record that you might see in a county office:

> Crawford County, Ohio, Marriage Record [Volume] No. 5 1854-1860, p. 36, Henige-Foit; Crawford County Probate Court, Bucyrus, Ohio.

This citation is saying that source is a volume of marriage records created by Crawford County in Ohio, and the entry of interest (marriage of Henige and Foit) is on page 36 of that volume. How do we know what title to give that particular volume? In this case, we took it from the spine of the book itself: Marriage Record No. 5 1854-1860. To add clarity, I added the word "volume" but put it in square brackets to indicate that that word doesn't actually appear in the title.

There are a variety of options for indicating that you viewed the record online, some more detailed than others. Generally, you'd omit the physical repository (that county probate office and the town it's in) and replace it with the online info. Here's the simplest option:

> Crawford County, Ohio, Marriage Record [Volume] No. 5 1854–1860, p. 36, Henige-Foit; viewed at *FamilySearch* (https://familysearch.org : viewed on 31 March 2014), image 101.

The small drawback to that option is that "image 101" doesn't point your reader (or remind you) in which specific collection it is image 101. We can add the collection name to make it clearer:

> Crawford County, Ohio, Marriage Record [Volume] No. 5 1854-1860, p. 36, Henige-Foit; viewed at "Ohio, County Marriages, 1789-1994," *FamilySearch* (https://familysearch.org : viewed on 31 March 2014), image 101.

Notice that the description of the actual record and the online information are separate groupings—we even use a semi-colon to mark the division. The *page number* stays with the information about the volume of marriage records; the *image number* stays with the online information.

If we want to be very precise about the online location, we can describe even more specifically where in that collection of Ohio County marriages that image is, adding in the title of the sub-collection along with that image number. There are a few different acceptable ways to do that; here's one of them:

> Crawford County, Ohio, Marriage Record [Volume] No. 5 1854-1860, p. 36, Henige-Foit; viewed at "Ohio, County Marriages, 1789-1994," *FamilySearch* (https://familysearch.org : viewed on 31 March 2014), Crawford marriage records 1854-1860 vol. 5, image 101.

There are a lot of ongoing conversations in the field of genealogy about how to cite sources viewed online, and a lot of opinions (for example, is the "viewed on" date really needed?), so you will inevitably see some variation in styles among professional genealogists and among genealogical publications. Bottom line: communicate clearly what exactly the source is and where it can be seen.

Examples

The following examples, many of them from an article we'll be reading later in the course, are color-coded to show you the underlying pattern of the five questions that a citation answers:

Who? What? When? Where [is]? Wherein?

Change Who?

Note: to change the colors within the citations, either hover over the citations or click the buttons above.

Notice that the creator of a source ("Who?") might be a person, an organization, a business, a governmental entity, or unknown. If the creator is unknown, we usually omit that component rather than using "Anonymous" or similar.

Published Sources

William F. Hoffman, *Polish Surnames: Origins and Meanings*, 2nd ed. (Chicago: Polish Genealogical Society of America, 1997), 10.

Obituary of Sophie Howe, *Scranton Times*, Scranton, Pa., 18 February 1985, page 4, col. 3. As with so many newspaper articles, there is no named author, so the "Who?" component is absent.

Insurance Maps of Scranton Including the Borough of Dunmore, Pennsylvania, 3 vols. (New York: Sanborn Company, 1920), 2:185 and 187; digital images, *Pennsylvania State University Libraries Digital Map Drawer* (http://collection1.libraries.psu.edu/cdm/compoundobject/collection/maps1/id/24691/rec/6 : accessed 27 May 2015). Notice that the website is a publication, so its title is in italics. The creator of the website is implied in its title (Pennsylvania State University) and so is not repeated.

Judy G. Russell, "The Beer Bust and the Surety Bond," 28 February 2012, *The Legal Genealogist*, blog (http://www.legalgenealogist.com/2012/02/28/the-beer-bust-and-the-surety-bond/ : 5 February 2018).

Unpublished Sources

Pennsylvania Department of Health, death certificate no. 015092 (1985), Sophie Howe; Pa. Dept. of Health, New Castle. Note that this is a state record and a certificate; compare its citation to that of the Crawford County marriage record in a bound volume, earlier on this page. Notice too that with this one-page source there is no need for a "Wherein?" component.

Pennsylvania Department of Health, Certificate of Death no. 75729 (1960), Zofia (Koniecki) Kanetski; Pennsylvania State Archives, Harrisburg. Note that the citation for this record reflects that death certs through 1963 are held at the state archives, unlike the more recent one immediately above, held at the state Department of Health.

Aroostook County, Maine, Record of Deeds 8: 7-8, Henry Cormier to Antoine Ouellette, 17 August 1871; Northern Registry of Deeds, Fort Kent, Maine.

Lackawanna Co., Pa., Deed Book 272: 549, James et al. to Konasky, 15 April 1916; digital image, Info Quick Solutions, *Lackawanna County, PA* (www.searchiqs.com/palac : accessed 27 May 2015). The components of the second layer (the online information) can be looked at either separately or as the whole "Where [is]?" component.

Lackawanna Co., Pa., estate file no. 243, Sophie Howe (1985), will of Sophie Howe, 20 September 1982; County Register of Wills, Scranton.

Sophie (Golembiewski) Jimcosky (123 Fictitious St., Anytown, State), interview by Melissa A. Johnson, May 2013; transcript in Johnson's files, P.O. Box 4312, Middletown, NJ. Sophie is the daughter of Lenore (Kujawski) Golembiewski; her knowledge about Anna Stasevich was second-hand from overheard conversations among her mother, aunt Stella Grevera, and grandparents.

Stanley Grevera (fakeaddress@fakeprovider.com), email to Melissa A. Johnson, 10 December 2013, "Kujawski family," Genealogy Correspondence Folder; Johnson's electronic files, P.O. box 4312, Middletown, NJ. Stanley's information came from his mother Stella.

Anna Mary Stasiewicz petition for naturalization (1944), naturalization file no. 207052, Eastern District of Michigan; Records of the District Courts of the United States, Record Group 21; National Archives, Chicago.

Sophie Howe, SS no. 161-26-2124, 26 March 1949, Application for Account Number (Form SS-5), Social Security Administration, Baltimore, Md.

US federal census records: citation quirks

Unique patterns have developed for a few sources; the US federal census is the one you're most likely to use. Notice in particular the arrangement of the names of county, state, and town:

> 1920 US census, Bee County, Texas, population schedule, Beeville, enumeration district (ED) 6, sheet 6A, dwelling 115, family 118, Rafael Martinez household; National Archives and Records Administration (NARA) microfilm publication T625, roll 1775.

Why is "enumeration district" followed by "ED" in parentheses, and "National Archives and Records Administration" by "NARA" in parentheses? So that in subsequent census citations in the same report, notes, or article, we can save time keyboarding as well as save

space on the page with abbreviations:

> 1920 US census, Lackawanna Co., Pa., pop. sched., Scranton, ED 131, sheet 10B, dwell. 212, fam. 221, Roman Kenetski household; NARA microfilm T625, roll 1579.

For Reference and Further Study

As you read publications such as the two articles in week 4 of this course, closely observe the citations. Look for the pattern that answers the five questions “Who? What? When? Where [is]? Wherein?” Are there citations that you can use as models for your own work?

The genealogy field generally follows *Chicago Manual of Style*; citations are covered in chapters 14 and 15. *Evidence Explained* is based on *Chicago Manual of Style*, but goes into much more depth about the nuances of source citations, especially regarding unpublished sources such as many types of original documents. See also Standard #6 in *Genealogy Standards*.

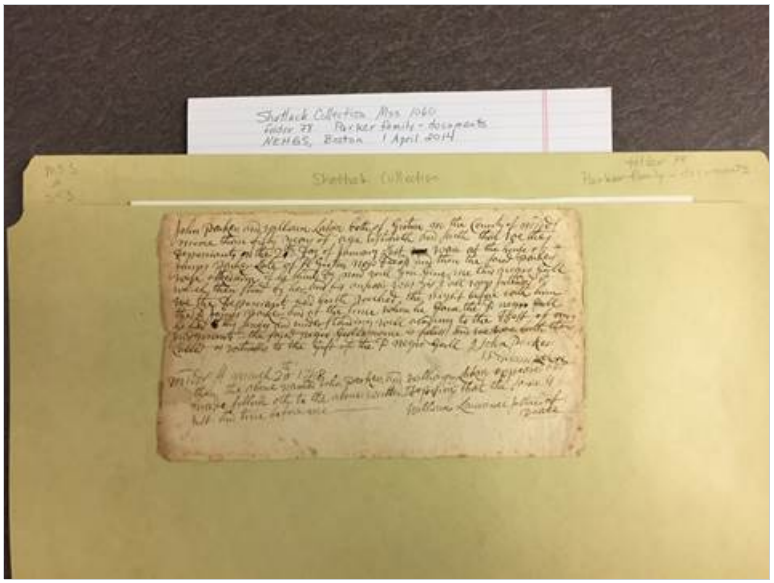
[1]These pertain specifically to citations in footnotes. A couple of these conventions are a little different for citations in a bibliography.

Capturing Citation Details

Capture Citation Information When You View the Source

You might have noticed that the Genealogical Proof Standard does **not** limit the need for "a complete and accurate citation" to "whenever we finally publish our work in a book, journal, or on a website." Good genealogical practice dictates that we collect the identifying information of our source *as we work*. If we don't, we run the risk that we will not be able later to tell where a given piece of information came from, or that we will waste time, effort, and possibly expense in retracing our steps to verify our own previous work.

Deposition of John Parker and William Lakin



Click on the image to view a larger version

Deposition of John Parker and William Lakin, 20 March 1748/9; in folder 78, Parker

family—documents; Shattuck Collection, Mss 1060 (formerly Mss A S53); New England Historic Genealogical Society, Boston, MA. Image used here with permission of New England Historic Genealogical Society, www.AmericanAncestors.org.

The researcher captured the necessary citation elements here by including them in the photo; the folder and note can be cropped out when adding the image to the research report, with a citation properly and neatly typed below. The working citation provided below the image here includes an old call number for the collection because it had changed since previous work with these documents and no longer matched earlier research notes; you can also see the old call number in the upper left corner of the file folder.

Elements of Citations

Self-assessment

Eleven citations have been broken down into their components (or “facets”) as they answer five key questions: a) Who? b) What? c) When? d) Where [is]? e) Wherein?

For each citation, identify which question each component answers. You might wish to review Standard #5 in *Genealogy Standards* as well as this module’s section "Documenting Our Work: Citations." Some of the citations have only four components instead of five.

This is an ungraded exercise.

Module 1: Elements of Citations

Judith L. Van Buskirk, *Standing in Their Own Light: African American Patriots in the American Revolution* (Norman: University of Oklahoma Press, 2017), 237.

1/11

Drag the items below to the correct component in the citation above.

WHO WHAT WHEN WHERE [is] WHEREIN

Lesson 3: The Tools We Use

Working Tools: Pedigree and Descendant Charts

The Tools We Use

Genealogists use a variety of tools to capture and organize information, record research in process, analyze findings, and communicate results of research with others. Some of the tools do double-duty: for example, a pedigree chart can be both a way to visually organize information while in the middle of research as well as a way to share (communicate) a snapshot or overview of “the family tree."

We'll learn about the following tools in this course:

- Pedigree chart
- Descendant chart
- Family Group Sheet (FGS)
- Research log
- Timelines and document lists

Important conventions for entering information in charts include:

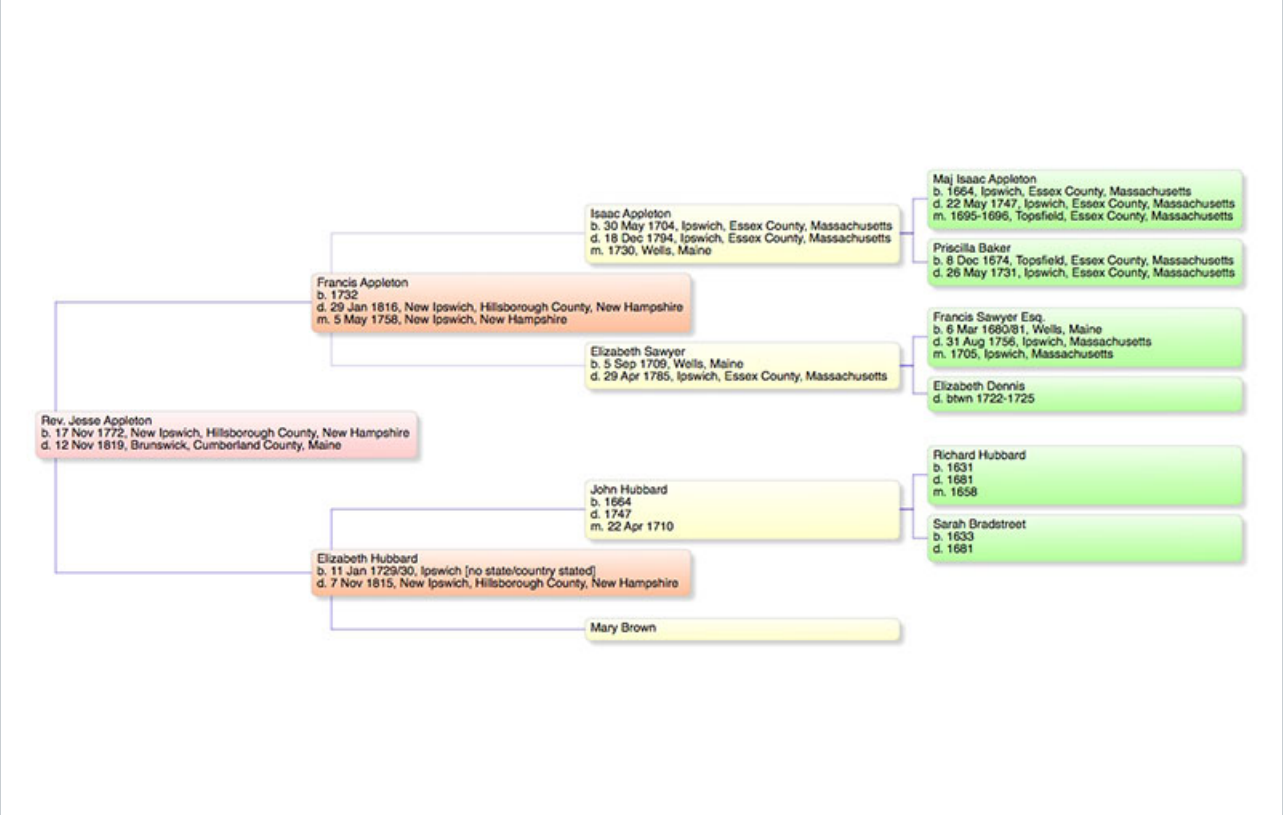
- Record surnames as they were given at birth, that is, not by married surname if that is different from the birth surname.
- Write dates out fully, with the month spelled. For example: 11 March 1903, not 3/11/03. The notation 3/11 is ambiguous: it might mean March 11, or November 3, depending on the writer’s origin or quirks of recording dates. The need for a four-digit year should be obvious, as we work with dates from at least a few centuries!

Other working tools include:

- genealogy database software
- software applications (“apps”) for tasks such as imaging and organization

The **pedigree chart** is probably the most familiar and recognizable type of genealogical chart. You'll see these scattered on the table in front of a researcher in an archive or historical society, perhaps filled in by genealogy software and printed out for reference, or perhaps as a blank form being penciled in as the researcher works that day. You might have seen a decorative "Our Family Tree" in a friend's home or have inherited or created one yourself. A pedigree chart begins with a single person (such as yourself), recording the name, dates of birth, marriage, and death, and sometimes the location for each of those events. To the right—or above, depending on the orientation of the chart—are the two parents of the first person with their dates; and to their right, their parents, that is, the four grandparents of the first person. The number of generations into the past illustrated by the chart depends on the size of the paper and the print, and the needs of the researcher. Four or five generations can usually fit nicely on an 8 ½ by 11 inch sheet of paper. Larger folding charts for seven, nine, or more generations are available commercially, and of course the size of a decorative pedigree chart is pretty much limited only by one’s budget.

Pedigree Chart



Click the image to download as a PDF

The **descendant chart** is the other chart you're likely familiar with. This chart starts with a couple at the top, and shows one or more generations of their children, grandchildren, and possibly later generations, below them. A descendant chart can illustrate all the descendants of a couple for a certain number of generations, or it can show only certain lines of descent to depict the relationship between two or more of the couple's descendants.

Descendant Chart

Descendant Chart Exercise

Later in the course, we'll be examining a short article, "Who Was Aunt Mary? A Brief Case Study in Identification and Kinship 'Correction'," by Carmen J. Finley. The author's goal was to determine exactly how Col. James Boydston Armstrong and Mary, "Mrs. D. B. Stewart," were related.

Directions:

The following items of information are simplified extracts from Finley's article. Using these seven sentences and the nearly-blank descendant chart below, drag and drop each of the names into its proper place on the descendant chart. Women's married names appear in the article in the format "first name (maiden name) married surname." (*Note: additional details that help tie these people together, such as locations, are omitted from the extracts.*)

Drag and drop each name to the correct space on the chart. An incorrectly placed name will return back to its original position.

Mary Boydston

Mary Burgan

Daniel Burgan

Barbary Smith

George Boydston

Daniel B. Stewart

[-?-] Armstrong

Elizabeth Boydston

Items of Information:

1. The colonel's mother's name was Mary Boydston.

2. D.B. Stewart and his wife Mary A. appear in Athens, Ohio in the 1880 census. They appear again as Danil [*sic*] Stewart and his wife Mary E. in the 1900 census.

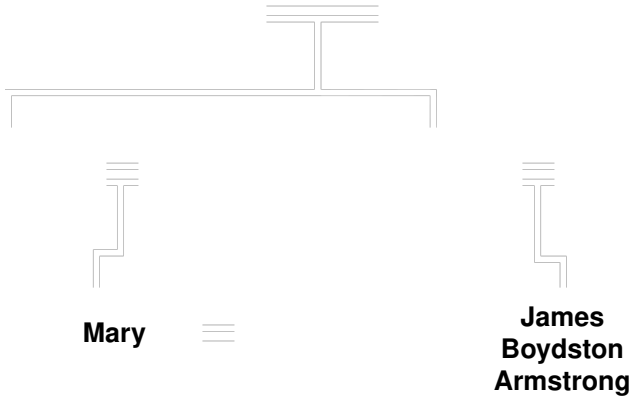
3. An obituary for the widow of Daniel Stewart identifies her as "formerly Miss Mary Burgan."

4. Colonel Armstrong's mother had an older sister, Elizabeth, who married Daniel Burgan.

5. A family Bible record identifies Mary (Boydston) Armstrong and Elizabeth (Boydston) Burgan as daughters of George and Barbary (Smith) Boydston.

6. In his will, George Boydston named some grandchildren as heirs, including Mary Burgan.

7. The death certificate for Mary Elizabeth Steward (Mrs. D.B. Stewart) records her father's name as Daniel Burgan, and her mother's name as unknown.



Next

Family Group Sheets

Pedigree and descendant charts provide a multi-generation overview of a family and note the most basic information for each individual. In their roles as working charts or illustrations for source-cited written work, they often don't include documentation (that is, source citations) for the information.

In contrast, the **Family Group Sheet (FGS)** or "family group record" focuses on the details for one couple and their children (if any), and its format usually allows for easily adding citation numbers for each item of information and footnotes at the bottom of the form, the back of the form, or on an additional page.

Often you'll find multiple sources for an item of information, some of which offer details that are partial, questionable, or conflicting to some degree. For example, one source might supply a month and year for the date of an event, and another source supplies month, day, and year but the year is "off" by one year in comparison to the first source. A few words of explanation added to a citation will keep everything clear: "For the

September 1903 date of marriage, see [source citation]. For the 9 September 1904 date, see [a different source citation]." The FGS is a working tool and as such is not the place where you should attempt to resolve inconsistencies or solve research questions.

Charles Riehl Family Group

Courtesy of Allison Ryall and used with her permission.

The family group sheet above was generated by a genealogy database program, and the user had choices of which fields to include. Citations are in working format—the necessary information is present but not always in the standard sequence.

Another example, this one blank for your own use if you wish:

Generic Family Group Sheet

There are a number of free family group sheet forms available online, with some variations among them. Some are PDFs that must be printed and filled in by hand; others are PDFs that can be filled in on-screen and then saved or printed; and still others are created in Word (.doc or .docx file) or other word processors and can be filled in on-screen or printed and filled in manually. See below for a list of web links. You might also enjoy designing your own family group sheet template in your favorite word processing software.

Charts—pedigree, descendant, and family group sheets—can be found in several places online:

- *Ancestry* (no subscription or login required for access to these charts): http://www.ancestry.com/cs/charts-and-forms
- *FamilySearch* has wiki articles about the various charts, with links to their own and other providers' charts; see for example https://www.familysearch.org/wiki/en/Family_group_record:_roadmap_for_researchers
- "Family History Forms" page on the website of the Mid-Continent Public Library: http://www.mymcpl.org/genealogy/family-history-forms. These are downloadable PDF forms that you can type in on-screen and then save or print; their family group sheet is called a "family unit chart"
- *Cyndi's List* offers many links in the "Charts and Forms" category: https://www.cyndislist.com/charts/

Most genealogy database programs also allow a user to choose a family in the database and auto-fill the charts with that family's information, or to print blank charts to fill in manually. These are usually customizable for additional fields of information.

Exercise: Takei Family Group Sheet

This ungraded exercise provides an opportunity to practice using a family group sheet before going through the same process in preparation for the M1 assessment. Use our blank FGS form.

A filled-in FGS is linked at the bottom of this page for you to compare to your own efforts.

Instructions:

Using the provided Family Group Sheet (FGS), fill in the chart for the **birth family** (i.e., parents and siblings) of the following American entertainer, **using only the sources indicated**.

Extract the information that each source provides and enter it in the FGS. In the Sources section at the bottom of the template, number each source and cite or succinctly describe it to the best of your **current** ability. You will need to provide enough detail for each (beyond just a website or database name) so that you or a future reader can follow your trail back to the appropriate record.

Use the source numbers [in square brackets] to indicate which support(s) each item of information that you enter. Consider:

- An information item such as a date of birth may have multiple sources supporting it, in which case it would need to be followed by (for example) “[2], [4]” or “[2, 4].”
- Think about how you will show source identification for items of varying or conflicting information, such as different dates of marriage (either explicitly stated or implied). How will you express the differing dates on the chart and how will you make it clear which source goes with which information item?

Links to the records are provided for those who have trouble finding them or are short on time. If you decide to use the supplied links for *Ancestry Library Edition* or *FamilySearch*, you will first need to log into the site for the link to work. *Note that some of the records have information on both front and back or are more than one page long—in that case, they may span more than one image*

*Do no research on the family beyond the sources specified. Do not use your personal *Ancestry* subscription. Do not create trees, post queries, or otherwise leave public traces of research on this family.*

George Takei

Use the provided Family Group Sheet to record the birth family of actor George Takei.
As a bit of a shortcut *for this example,* you can use *Wikipedia* to help you locate the sources we want you to use for the assessment, or you can just click on the links below. *Wikipedia* is **not** one of the sources from which you will extract information for the FGS.

You will **not** be using *Wikipedia* for the graded M1 assessment.

Start by looking up George Takei in *Wikipedia*. If you have trouble navigating to or finding his entry, click here for Takei's specific entry.

Using *FamilySearch* or the course-supplied subscription to *Ancestry Library Edition*, find the following records for the family of George Takei; you may search for and work with them in any order. Links are provided should you have trouble navigating to or finding the entry. Note that you must be logged into *FamilySearch* for the first two links to work, and logged into *Ancestry Library Edition* for the remaining links to work:

1. The 1935 marriage in California of George Takei’s parents.
2. 1940 federal census, Los Angeles, California, for the young George Takei with his parents.
3. George Takei’s family was held in a Japanese internment camp during World War II and they appear in the Final Accountability Roster of Evacuees at Relocation Centers. For information about the column headings, see the Columnar Information Index at image 10 of that same collection.
4. The 1958 Petition for Naturalization of George Takei’s father, in the District Court of Los Angeles.

Access the completed FGS here. Note: the citations are in draft form, not in a final polished form.

Working Tools: Research Logs

The temptation to move from one successful search directly to the next record is a strong one! We're sure that at the moment our hasty notes will do, because of course we will thoroughly write up our findings before the day ends, and we're certainly not going to forget where each photocopy or image scan made that day came from. And we'll remember how a particular page of notes seems to relate to one of those photocopies…won't we? And if we don't write things up properly at the end of the day, and find that six months have passed before we pick up our research project again, we'll still be able to see what we did and did not search during that last visit to the historical society or state archives, right?

Probably not. Countless genealogists have tried that "system" when they were beginning researchers, and none of them today write or lecture about the benefits of "writing it up later."

One of the most powerful tools for keeping ourselves organized as we move through the research process is a research log. A research log records what we were searching for, what we found (or didn’t find), and where we found it (or not). As with the other charts discussed above,

there are a variety of styles available at various websites and within genealogy software programs.

Many genealogists design their own research log, creating a template in a word processing program, designing a table, or using a spreadsheet, and then tweaking the design as they learn what format best serves their purposes and research style. But all research logs have certain categories in common; for each source searched they record:

- The objective of the search, and the time period searched
- Date of research
- Repository name (where the source is, including website if an online search)
- A citation of the source
- Notes about the source, such as its condition, limitations, and impressions of the quality of information
- The result of the search (whether the objective was found or not)

Some genealogists also make note of whether a copy, scan, or digital image was made, and any document number they assign to a source. The following example illustrates two lines from one genealogist's afternoon of research in microfilmed Nova Scotia records. Note:

- It's very clear what he searched: he records call numbers, time period covered, and that he was looking at indexes rather than records.
- He makes reference to another working document, his deed worksheet, where he recorded more details.
- He's very specific about the negative results of the probate search; he won't need to ask himself in the future, "did I find any Kings at all in that index?"

Research Log

Researcher _____ Page 1 of ____

RESEARCH LOG Topic or Ancestor Name: King family Locality: Guysborough, Nova Scotia

	Search Date	Repository, URL, Call No.	Source Description (Title, Author, City, Pub, Yr, Film No., URL)	Purpose	Comments or Result (include negative findings)
1	8/13/11	NEHGS #C588 NG43 G8b micro	Guysborough Dist. (Nova Scotia) deeds, 1785-1910 Index Vol. 1 (1816-1845) FHL 802091	Land records for Henry King + family	John, George and Henry King as grantees + grantors 1852 – 1845 (see deed worksheet)
2	8/13/11	NEHGS #C588 NG43 G8 micro	Guysborough Dist. Nova Scotia index to wills, estate papers 1855-1946 FHL 806022	Probate for King family	Only 2 King surnames – dates are later than my focus.
3					
4					
5					
6					
7					
8					

Image is courtesy of Robert Stanhope and is used with his permission.

The following chart is an excerpt from the ten-page-long research log of a complex project: Research Calendar. (Courtesy of Corey Oiesen and used with her permission.)

Notice

- This genealogist has added and modified some columns: 1) Although this project was personal research, she chose to track her time as she does for client work. 2) Rather than including each document's source citation on this form, she listed citations on a separate page, assigned

each source a document number, and then referenced the document numbers on the research log.

- "Negative results" are recorded in the research log. It's important to keep track of sources that have been searched but did not produce results; it's simply too easy to forget all the places we have searched and the particular parameters we used each time. Additionally, our notes might later indicate that it would be worthwhile to revisit a particular source in light of information found in the research process.
- Questions to herself, notes on further research, and lines specifically for "next steps" are incorporated into the log.

Research Logs

You might enjoy the two-part video presentation about research logs by genealogist G. David Dilts, AG[6], accessible via the Learning Center of the FamilySearch website. Dilts also discusses how the use of research logs fit into his work flow and his filing system. You'll take away a number of good ideas from his presentation!

More Tools Ahead

Later in this course we'll discuss timelines and take another look at research logs.

[6]AG stands for Accredited Genealogist, indicating that the genealogist has passed rigorous oral and written examinations. See https://www.icapgen.org/ for more information about the accreditation process.

Summary and Further Resources

Summary

Researching and documenting family history is an iterative process. During this week we discussed the Genealogical Proof Standard (GPS) and gave you the opportunity to apply terminology that is essential to the professional genealogist. You have looked at some sample records and also reviewed some tools that help organize the information. Through the reference reading assignments, you gained additional information about these topics and delved deeper into some of the problems that can occur along the way.

Further Resources

Jones, Thomas W. *Mastering Genealogical Proof.* Arlington, Virginia: National Genealogical Society, 2013.

Jones walks the reader through a discussion of what "proof" is, the concepts and terminology we use, and the five elements of the Genealogical Proof Standard (GPS). Each chapter includes exercises and their answers. This is not a beginner's book, but this course gives any of you a good foundation for continuing your genealogical education with Jones's book.

Mills, Elizabeth Shown. *QuickSheet: Citing Ancestry® Databases and Images* Evidence *Style,* 2nd ed., rev. Baltimore: Genealogical Publishing, 2019.

Mills, Elizabeth Shown. *QuickSheet: Citing Online Historical Resources* Evidence *Style,* 2nd ed. Baltimore: Genealogical Publishing, 2017.

Citations

Notice the differences between the footnote style citations we explored in Lesson 2 and the bibliography-style citations above:

1. Names are in LastName, FirstName order. Bibliographies and source lists are often arranged in alphabetical order by author's surname.
2. Specific page numbers are not provided.
3. There are no parentheses around the publishing information.
4. The components of the citation are separated by periods instead of by commas.