

# Family History Research–Methodology

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## Outline

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This class will cover the following topics:

- Organizing your research
- Recording information (names, dates, places)
- Evaluating research sources
- Documenting research sources

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## 1. Organizing Your Research

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Before you can get too far in doing lots of research, you need to have some idea of what you are going to do with the information you find. How do you organize it? What do you need to write down? How do you write it down? How do you tell later what you have found and what you are still looking for? How do you know where you found a certain piece of information? How do you judge whether information is more or less reliable than other conflicting information you found?

- You will need to have a system to organize things like the following:

- Sources of information
- Original documents
- Photocopies and digital images
- “To do” items
- Correspondence
- Books, microfilms, websites, and other sources checked

- There is no one best system for organizing your research. You should use whatever system makes the most sense to you, and one that you will actually use.

“Your system shouldn't be so complicated you spend more time filing than doing research.”

- Allen, Desmond Walls and Billingsley, Carolyn Earle, “Organizing Your Family Records,” *Beginner's Guide to Family History Research*, Chapter 3, <http://www.arkansasresearch.com/guide.html>.

See FamilySearch Guide handouts:

*Organizing Your Paper Files*  
*Organizing Your Paper Files Using File Folders*  
*Organizing Your Paper Files Using Binders (Notebooks)*  
*Organizing Your Genealogy Using Computers*

For further reading:

FamilySearch ResearchWiki topic, “Organizing Your Files”  
 ([https://wiki.familysearch.org/en/Organizing\\_Your\\_Files](https://wiki.familysearch.org/en/Organizing_Your_Files))

Guide to Family History Research: Organizing Your Family Records  
 ([http://www.arkansasresearch.com/guideindex\\_files/guideorganizing.htm](http://www.arkansasresearch.com/guideindex_files/guideorganizing.htm))

Cyndi’s List: Organizing Your Research  
 (<http://www.cyndislist.com/organize.htm>)

## 2. Recording Information

It is good practice to be consistent in the way you record information. Some of the most basic items of information you will record are names, dates, and places.

### Names

- Surnames: Use a system to allow you to distinguish between surnames and given names. This will help reduce confusion and mistakes.

*Example for discussion in class:*

Which is the surname?     George Bruce  
                                       Healy Clifford  
                                       Augustine Van Newton  
                                       Marvin Reynold  
                                       Jose Juan ante Portam Latinam Gonzalez  
    Espinoza y de Nunez y Sainz y Rodriguez

Common methods to designate surnames include:

Capital letters: Peter Daniel SMITH

In PAF 5, surnames are separated by / /: Peter Daniel /Smith/

- Nicknames: Knowing a person’s nickname can be very useful for helping to find him or her when doing genealogy research. However, when recording a person’s name (for example, in genealogy software programs), it is good practice to use the person’s real name, rather than a nickname. Genealogy software programs often have a field available specifically for recording nicknames. Use it or some other consistent method for keeping track of the different names a person was known by.

- Name unknown: DO NOT use “unknown” or similar entries for someone’s name; just leave the space blank. If a child’s name is not known, record only the sex and father’s surname (not boy, girl, child, infant, stillborn, unknown, etc.).

### Dates

- For clarity and in order to avoid misunderstandings, it is good practice to write dates in the format of *day month year* (example: 6 Sep 1902). Avoid using numbers for months, and write out the year in full.

*Example for discussion in class:*

Does 6/9/02 mean 6 Sep 1902 or Jun 9, 2002?

- If you have more than one date for an event, and you wish to show both dates, you can use a slash or the word “or”.

Examples: 14/16 Jul 1822; 1878 or 1888; 2 Feb 1839/40

### Places

- Write city, county, state, country (smallest to largest geographical divisions).

Example: Seattle, King, Washington, USA

- It is good practice to omit descriptive words unless they are needed for clarity.

Examples:

“Cleveland, Cuyahoga, Ohio,” instead of “Cleveland, Cuyahoga County, Ohio”  
“Putnam County, Florida” not “Putnam, Florida” if only the county is known

- Avoid postal abbreviations, which are easy to misinterpret.

Examples:

WA stands for Washington, but also Western Australia

MI stands for Michigan, but could be confused with Mississippi, Minnesota, etc.

- For clarity, it is best to use the place name in use at the time of the event.

Examples:

“Prussia” instead of “Germany” for events before 1871

“Virginia” instead of “West Virginia” for events before 1863

or if a county name has changed, record the name from the time of the event

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### 3. Evaluating Research Sources

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Primary Sources: “A *primary source* is a document written by an eyewitness or another person closely connected with the event [which] was recorded soon after it happened. Information from primary sources is usually very reliable. You should use primary sources whenever possible.”

– *From You to Your Ancestors*, 3rd ed. (1982), p. 44.

Examples: Vital records (birth certificate, marriage certificate, death certificates [regarding death information])  
Family records (Bibles, journals, diaries, photos)  
Church records (christenings, marriages)  
Probate records  
Cemetery records  
Immigration records  
Military and pension records  
Land records  
Census records

Secondary Sources: “A *secondary source* is a document written by a person not closely involved with the event or by an eyewitness who recorded the event a long time after it happened. Secondary sources are less reliable than primary sources.”

– *From You to Your Ancestors*, 3rd ed. (1982), p. 44.

Examples: Vital records (death certificates [regarding birth information])  
Family records (memoirs, Bibles, journals, diaries)  
Probate records  
Cemetery records  
Pension records  
Census records  
Family histories  
County histories  
Obituaries  
Books  
Websites  
Other researchers

Original Records: “An original record or document is the first transcription of an event or circumstance in a particular manner.”

- Wright, Norman E. and Pratt, David H., *Genealogical Research Essentials* (1967), p. 88.

Transcribed Records: “[A] copy is any subsequent transcription resulting from the original.” (*Ibid.*)

*For discussion in class*: What about photocopies or digital images?

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## 4. Documenting Your Research

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Tracking sources: Keep track of the sources you use, so you can tell which information came from which source. Everything you record came from somewhere, even if it is just your best guess, and it is the best practice to record its source.

Advantages of documenting your sources include:

1. Source citations demonstrate the good quality of your work to other researchers.
2. Knowing the source of a piece of information helps you to evaluate its accuracy when you encounter conflicting information in a different source.
3. You can avoid the duplication of effort which would result from checking the same source multiple times (because you don't remember you looked at it already).
4. If you show the source, you don't end up unfairly taking credit for other people's work (or other people's mistakes).

Source information you can track includes the following:

- Title
- Author
- Date published
- Page number
- Call number or internet address
- Repository
- Date of your search
- Comments

For a more in-depth discussion, see the FamilySearch ResearchWiki topic, "Cite Your Sources (Source Footnotes)" at:

[https://wiki.familysearch.org/en/Cite\\_Your\\_Sources\\_%28Source\\_Footnotes%29](https://wiki.familysearch.org/en/Cite_Your_Sources_%28Source_Footnotes%29).

Unsuccessful searches: It is also a good idea to track the sources you have checked where you didn't find anything of interest. This can help you avoid wasting time by going back and checking that source over again later on.

Research logs: Various research log forms are available at the following locations:

- [http://www.familysearch.org/Eng/Search/rg/images/31825\\_ResLog.pdf](http://www.familysearch.org/Eng/Search/rg/images/31825_ResLog.pdf)
- <http://www.ancestry.com/trees/charts/researchcal.aspx>
- <http://www.cs.williams.edu/~bailey/genealogy/ResearchRecordSheet.pdf>

Correspondence logs: It also makes sense to keep a list of the letters and e-mails you send out for information. Doing so allows you to follow up when you haven't received a response. Correspondence log forms can be found at:

- <http://www.ancestry.com/trees/charts/correcord.aspx>
- <http://www.cs.williams.edu/~bailey/genealogy/CorrespondenceRecordSheet.pdf>
- <http://www.familytreemagazine.com/upload/images/pdf/correspondence.pdf>

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Appendix A  
**Basic Research Process**

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1. **Start with what you have** (personal knowledge, family records, talk to relatives).
2. **Identify what information you don't have.** Organize your data in a way that makes sense for you. You can use PAF or another software package, or pencil or paper. Don't use New FamilySearch for organizing research information.
3. **Select one individual, family, or family name to focus on at a time** (it may be appropriate to make this a matter of prayer).
4. **Work backwards from what you know to what you don't know** (for example, if you remember Grandma Smith died in 1968, her death certificate should give her birthdate and place and her parents' names). Look for one event at a time.
5. **Try to find two or more sources to confirm a date, place, name, or relationship.** This is good genealogical research practice, to ensure accuracy; this is NOT required for submitting names to the temple.
6. **Vital records and other original sources are generally more reliable than records created years after the fact.** Don't just assume that research others have done is correct; you may need to double-check. Sources such as the Ancestral File contain unverified information, and may best serve to give you a starting place for focusing your research into original sources.
7. **Consider as many types of sources as you can find; don't necessarily rely on just one type of source** (family records, information from relatives, family traditions, vital records, bible records, journals, census records, county histories, sources available at the Family History Center, sources available at the public library, obituaries, military records, sources on the internet, and so forth).
8. **If you can't find information on an individual, try looking for his relatives** (for example, a brother's marriage record may tell you names of the parents of your ancestor; or a son's death certificate may tell you the birth place of the father; or census records may show your ancestor living in his son's household in his old age.).
9. **If you seemingly reach a dead end, it may be time to select another family name to work on.** Listen to your feelings; an ancestor you are not now researching may be anxiously waiting for temple ordinances to be done. If you feel compelled to research a line for which you believe all temple work has been completed, someone was probably missed.

[See also "Start Your Family History" at <http://www.familysearch.org>]

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**Appendix B**  
**Sample Research Logs**

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These sample research logs adapted from *Genealogical Research Essentials*, by Norman E. Wright and David H. Pratt (Bookcraft, 1967), pp. 141-143:

*1. Research log focused on a particular type of source: family and home sources*

<b>RESEARCH LOG</b>		
TYPE OF SOURCE OR JURISDICTION:	<i>Family and Home</i>	
SURNAMES OF INTEREST:	<i>Long, Spencer, Paulk</i>	
DESCRIPTION OF SOURCE	DATE SEARCHED	EXTRACT NUMBER
Alvin Long family record	1 Jun 2004	A1
Maude B. Long book of remembrance	1 Aug 2004	A2
Personal interview with G. W. Long	3 Aug 2004	A3
Old Temple Ordinance Book of Alvin Long etc.	9 Sep 2004	A4

*2. Research log focused on a particular type of source: books*

<b>RESEARCH LOG</b>		
TYPE OF SOURCE OR JURISDICTION:	<i>Printed Secondary Sources</i>	
SURNAMES OF INTEREST:	<i>Long, Spencer, Paulk</i>	
DESCRIPTION OF SOURCE	DATE SEARCHED	EXTRACT NUMBER
Spencers of New England by A. W. Spencer, 1889	1 Oct 2004	---
Spencer Family in American by S. Long, 1925	1 Oct 2004	C1
Paulk Genealogy by Sara Paulk, 1963	2 Oct 2004	C2
Paulk Family of the South by A. Paulk, 1945 etc.	3 Oct 2004	---

## 3. Research log focused on a particular location: county

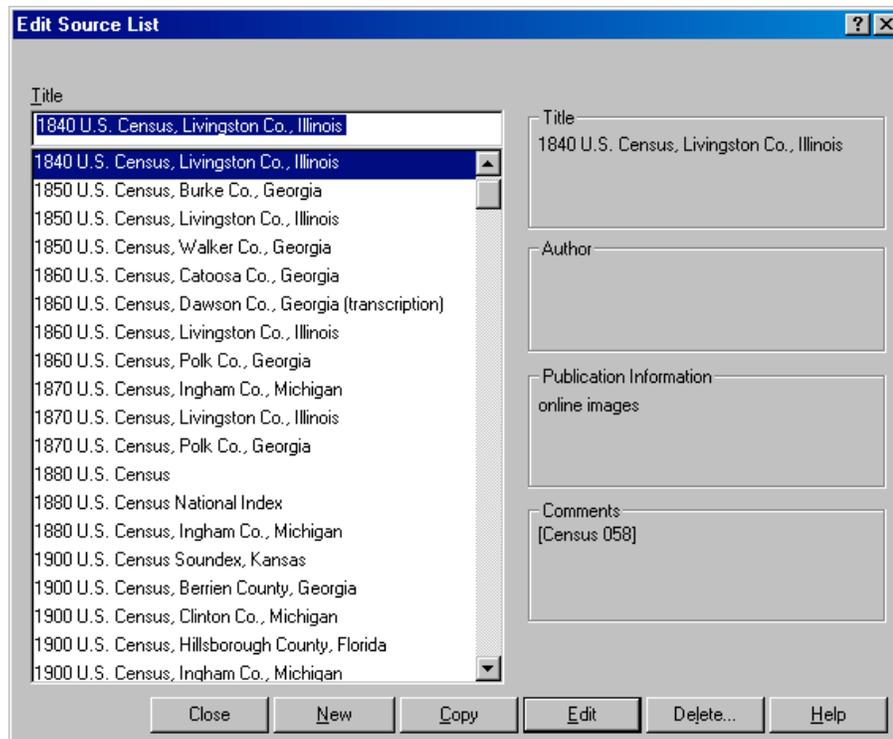
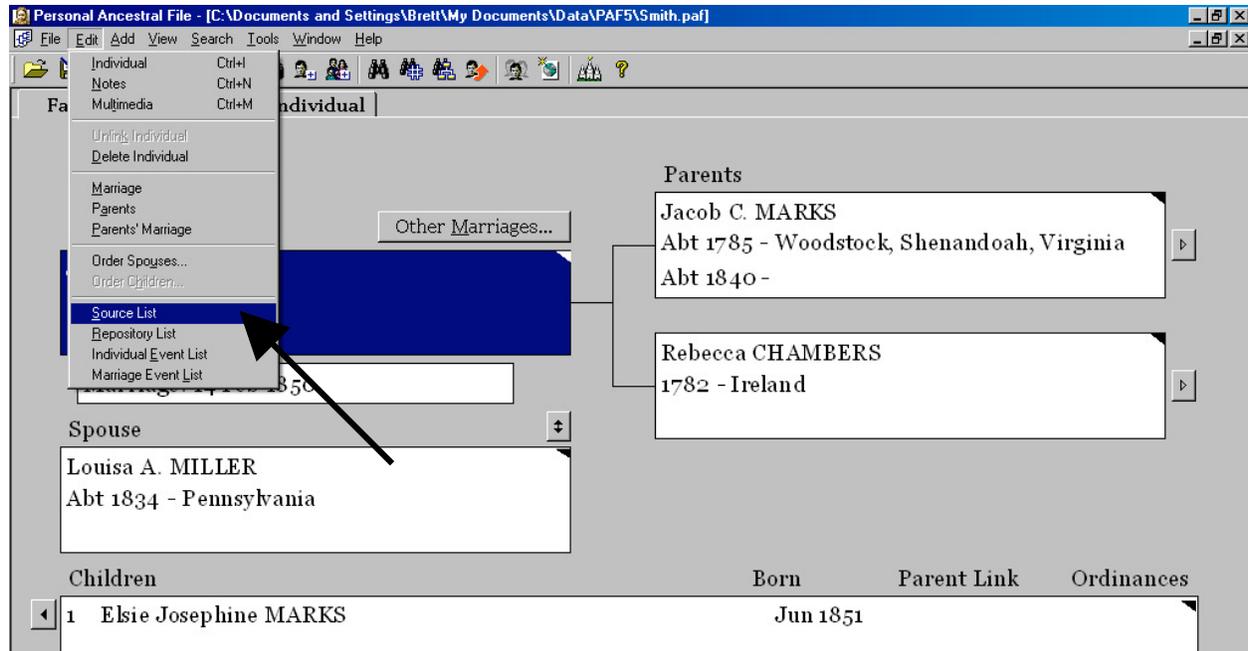
RESEARCH LOG		
TYPE OF SOURCE OR JURISDICTION:	<i>Athens County, Ohio</i>	
SURNAMES OF INTEREST:	<i>Long, Spencer, Paulk</i>	
DESCRIPTION OF SOURCE	DATE SEARCHED	EXTRACT NUMBER
1850 U.S. Census	2 Nov 2004	D1
1860 U.S. Census	2 Nov 2004	---
History of Athens Co. by C.M. Walker, 1868	3 Nov 2004	D2
Grantor Index to Deeds (1839-1890)	4 Nov 2004	D3
etc.		

## 4. Research log focused on a particular type of source: military records

RESEARCH LOG		
TYPE OF SOURCE OR JURISDICTION:	<i>Military Records</i>	
SURNAMES OF INTEREST:	<i>Long, Spencer, Paulk</i>	
DESCRIPTION OF SOURCE	DATE SEARCHED	EXTRACT NUMBER
Revolutionary War Pension Files Index	5 Nov 2004	---
Civil War Index (North)	5 Nov 2004	E1
Consolidated Index to Confederate Veterans	5 Nov 2004	E2

## Appendix C Example of Using the “Sources” Feature in Personal Ancestral File

How to access the source list:



Following is a sample entry for a source in PAF:

**Edit Source**

Source Title:  Print title in italics  
 Official History of Catoosa County, Georgia

Author:  
 Susie Blaylock McDaniel

Publication Information:  Print in (parentheses)  
 book

Repository... Call Number:  
 Harold B. Lee Library 975.8326 .M141o

Actual Text:  
 \_\_\_\_\_

Comments:  
 \_\_\_\_\_

Sample Footnote:  
 Susie Blaylock McDaniel, Official History of Catoosa County, Georgia (book), Harold B. Lee Library, Brigham Young University, Provo, Utah, 975.8326 .M141o.

OK Cancel Image... Help

Following is a sample list of sources for an individual:

Personal Ancestral File - [C:\Documents and Settings\Brett\My Documents\Data\PAF5\Smith.paf]

File Edit Add View Search Tools Window Help

**James MARKS**

PERSONAL:  
 Full Name: James /MARKS/  
 Sex: Male

EVENTS:  
 Birth: 3 Jan 1826  
 Place: Ohio

Christening:  
 Place: \_\_\_\_\_

Death:  
 Place: \_\_\_\_\_

Burial:  
 Place: \_\_\_\_\_

LDS ORDINANCES:  
 Baptism:  
 Temple: \_\_\_\_\_  
 Place if living: \_\_\_\_\_

Endowment:  
 Temple: \_\_\_\_\_

Sealing to Parents:  
 Temple: \_\_\_\_\_

OTHER:  
 Title (prefix): \_\_\_\_\_  
 Married Name: \_\_\_\_\_  
 Also Known As: \_\_\_\_\_  
 Nickname: \_\_\_\_\_  
 Cause of Death: \_\_\_\_\_  
 Physical Description: \_\_\_\_\_  
 Ancestral File ID: \_\_\_\_\_  
 Custom ID: \_\_\_\_\_

Shenandoah, Virginia

**Sources**

Birth of James MARKS

Citation 1 Citation 2 Citation 3 Citation 4 Citation 5 Citation 6 Citation 7

**Source**

1880 U.S. Census National Index

Author: \_\_\_\_\_

Publication Information:  
 compact discs

Repository: Family History Center, Spokane North Call Number: \_\_\_\_\_

**Citation Detail** 1 of 7

Film/Volume/Page Number: \_\_\_\_\_ Date record was made: \_\_\_\_\_

Comments:  
 Rooks Creek, Livingston Co., Illinois  
 age 55, 1880; b. OH

Actual Text... Image...

OK Cancel < > New... Delete... Help

RIN: 103 Template: Default

2nd Great Grandfather RIN: 103 MRIN: 2396 M: 3 C: 1