Family History for Fun and Profit: The Genealogy Research Process
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This is a “nuts and bolts” two-part session on the genealogy research system I use—to help you match what you already know with what you find in the records. To enable you to collect, store, and retrieve your data and squeeze every bit of genealogical evidence from both documents and printed sources. For beginners who want to get started correctly and for experienced genealogists who want to solve stone-wall problems—My guarantee to you: if you follow the procedures and strategies outlined, you can have a 96% success rate.

Part I: Genealogy Research Process—a firm, accurate Foundation

Step One: Preliminary Survey—is your genealogy already compiled? Exhaust family sources—corroborate family traditions, review personal and family records, identify and resolve conflicting information so you can build upon solid roots, collect “clues” to keep you going when others give up, and prevent duplication of effort. You can expect to gather and preserve from 10-300 years of already traced and often documented genealogy.

__Personal Records=personal identity. Records in your possession or in the homes and memories of close relatives and family friends. Be sure to distinguish between the recall of Aunt Nelly and the documents she has in her possession.

__Family Records=family identity. Records that describe or prove the family as a whole—father, mother, and all the kids with their spouses. Ask outright for family Bibles. These may be in personal possession or deposited in archives and libraries. Your relatives can often tell you which libraries or archives to check first. Look also for family files arranged alphabetically or by locality.

__Compiled Sources=extended family identity. Your extended family will include ancestors going back in time and descendants coming down I time to the present. Grandparents and their siblings, genealogy cousins you discover in FamilySearch.org, Ancestry.com, Rootsweb.com, and other websites easily searched.

__Genealogy in History and Biography=printed books often indexed by Google Books, manuscript collections with unpublished autobiographies or printed volumes interleaved with handwritten notes or glued-in news clippings and documents. These materials are most often found in libraries and archives. A few have been scanned and are available online.
Step Two: Pre-Search Analysis—Study your survey findings—what do you know?
Create an Ancestor Profile: 1) Summarize chronologically what you know about the ancestor.
2) Determine what you don’t yet know—where are the gaps?

Define your search dimensions—what proof do you need? Use this diagram as a worksheet—a “fill in the blanks” tool to plan your research for ancestors and their families.

Basic Sources--Marriage records, census, probate files, vital records, tax rolls and property
documents, cemetery sources and sexton records. Search in this order when possible, matching
each source to the ones searched before—build your lineage link by proven link.

Determine specific jurisdictions with an interest in your ancestor. What is a
Jurisdiction? It is a governing body with authority over the life, liberty, or the property of the
people within its boundaries. A jurisdiction creates and preserves records on its people so its
control is effective. In time of revolt, one of the first targets is the archive where the records are
located. For insurgents believe that destruction of records is destruction of control. And they are
basically right. The magistrate records your marriage so he can control your ability to marry
more than one person at a time. You allow your marriage to be recorded so you can benefit from
the legal rights of marriage: inheritance rights, legitimacy of children, support by your spouse, etc.

A career soldier is recorded in military jurisdictions; few soldiers are found in county records during wartime. A breeder of Morgan horses is recorded in stud tax rolls; his phaeton (racing carriage) is taxed as personal property. And his land deeds may be recorded where he resides rather than where the land is located because of his social position or money base.

You trace your ancestor from death back to birth through these jurisdictions in pre-planned order—the genealogy research process leads you to the records you need. More than 3,526 records and sources were created by the county alone in America—more than you will never live long enough to search.

Key Strategy:

__Write down what you know. Fill the paper with actual facts and data. Add no copyright, no restrictions.

__Add your name, permanent address, phone number, email/website.

__Circulate this profile—on business cards, on websites, on information sites and social media on the internet (all indexed by Google); tuck a paper copy in with letters, with requests sent to libraries and archives, and in correspondence with other genealogists.

Why this strategy succeeds—has data! People keep it; librarians keep it; because it helps people, it goes into family files. Databases copy it, your friends and followers will be amazed. Has questions that can be answered by those who know.

Part II: The Genealogy Research Process—Proving your Ancestry

Step Three: Planned Research—Collect documents and printed records with the data you need to prove your ancestors--from books and documents online, offline, and on the ground following your research plan as defined with your search dimensions tool. Chart your data as you go: One source, One family, One person per chart. You can do this manually on printed forms or on your computer with your genealogy program of choice. And in every instance, cite the records and sources from which you got your evidence. If you change, or add, or delete anything, record for us all what you did.

WHY? When you chart your genealogy data as you go through the records, your analysis keeps up with your research. And you ensure that you follow the right lineage from the beginning. When you put the father/husband on his line...When you put the mother/wife on her line...When you put the children in birth order and add specific comments...AS YOU GO—you will spot copy errors, mistakes in math, 2 or more persons of the same name with similar dates of birth, marriage, and death. You can switch search strategies and locations quickly to follow the right ancestor. And you will save search time and money.

Genealogy accuracy is a direct result of the way in which you capture and record your research data. And there is a degree of integrity in searching records by jurisdiction—if the names are recorded in your family Bible...if the record is preserved in your family possession or among
your grandfather’s papers deposited in local archives or libraries…these records carry a higher priority because they are found in your own family archives.

The Surname Target:

Use the Surname Target to ensure you look for the whole-family context of your ancestor. Adapted from Derek E. Harland, *A Basic Course in Genealogy*, Vol. 2, (Salt Lake City UT: Bookcraft, 1958), 127. Harland also recommends that you search cemetery records with and match the evidence to the marriage records.

Hidden Migration Evidence: For many years, Americans chose places to retire in climates of perpetual summer year round: Arizona desert, Florida beaches, California high desert, North Carolina Outer Banks, Puget Sound forests—regardless of their main residence during their lives. Now, more and more Americans are returning to their origins to retire, whatever the climate.

Consider how this trend can aid your genealogy. Old houses are renovated, unused spaces in local cemeteries become active again. Heritage Books now have descendants of original families to do write-ups. Celebrations recall or even re-enact the family stories. And you can Google all of this on the internet! You know the current generations and you can link them to their origins.
Mortality Schedules: length of residence in the state or the community and previous place of residence. Census taker comments.

Probates: purchase of estate items by out-of-area relatives. Legacies from persons who die overseas. Precise style of burial specified in the will. Locations of landed property bequeathed to heirs or distributed to heirs.

Vital Records: city registers for citizens of city, for non-residents, for those who live within the walls of the city, and those who live without. Places of birth for father and mother given on death certificates of siblings.

Cemetery Tombstones: occupation identified by tombstone art. Arrangement or layout of graves in the family burial plot. Precise place of birth for immigrant ancestors. Type, color, and style of tombstone.

Sexton’s Records: removal records or what is called bodies in transit. Original spellings of immigrant names—compare with name books for origins. Who paid for the funeral and burial, with residence? Place of final internment, especially those out of the area.


Church Records: itineraries of circuit riders where your cleric found his bride. Annual reports with their locations of churches, congregations meeting in homes of members, and assignments of clergy. Missionary journals with accounts of travel, overnight stopovers, visits with family along the way.

It is common for genealogists to pop in and out of these common sources, leaving much evidence behind in the records. Remember, what you extract from the source usually determines how successful your research will be. Take an extra minute and look for these hidden, non-obvious evidences.

Search Genealogy and History Periodicals Page-by-Page: Volunteer editors, and volunteer committees, sometimes a single dedicated genealogist gathers information and writes it up for your benefit. Usually these are local people who reside in the area where your ancestors lived and died. They are familiar with how the surnames are spelled. They know where the ancestors lived. They may even attend the same church (or a new church on the same foundation) where your ancestors sat each Sunday morning.

Turn to these experts for help. Almost without exception, they can give you the Genealogy Answers you need. Consistently, their work enables you to build the right family tree. So, go to your nearest genealogy library and find an empty table where you can spread out. Start with volume one, first issue. Work your way through the publication, page-by-page, until you reach the current issue (or as far as the library has subscribed).

If there is an index, check it for the surnames you need and those subject and place entries you already know about. And, DON’T STOP THERE! Even if the index is a good one, read the
Why spend the time to search page-by-page?

1. What surnames are associated with that local area you might otherwise overlook?
2. Do families still reside there who are related to the people you are searching for? Or, are family members who have moved away still interested in that place—still looking for ancestors you are also interested in?
3. What records, not available on microfilm at the Family History Library, have been discovered and transcribed for you to use? Tax lists, account books of local stores, muster rolls kept by local captains, church records including membership lists, dismissals, and admissions, and especially, cemetery listings.
4. New family histories, compiled by relatives unknown to you, reviewed by the editor and offered for sale—giving you the address and cost so you can order copies.
5. Genealogies written just for that quarterly and not published anywhere else.
6. Key facts and traditions about local families sent in by descendants, who hope their work will benefit others with the same ancestors.
7. Important research underway that you need to know about, so you don’t look in the wrong place or collect the wrong people or overlook a migration pattern peculiar to that specific place.

These are just a few of the things you will gain by reading page-by-page. The time invested is well worth it. An index alone will not give you this essential background. Nor will it identify specific research published in that quarterly, because people who live in that area will find it of interest. Watch for things which appear to be out of place. Remember that space is valuable so it is reserved for items of interest to subscribers who pay for those details.

Step Four: Post-Search Analysis—Study your research data—which ancestors are now proven? The case for tracing the whole family—placing your individual ancestor in the context of the whole family allows you to double check chronology, naming patterns, places of residence, migration patterns, religion, occupations, and other locations to search.

The Smiths in the Flat Bottom Cemetery, Jefferson County IN:

1. John Smith born 1801, consort Anna born 1799, buried in Flat Bottom Cemetery, and their son Samuel R. Smith born 1840, 10th IN Cavalry. These three burials are grouped together on Row 4 in another, independent reading of the cemetery where the burials are recorded in rows rather than alphabetically—John and Anna share the same stone, Samuel is buried next to them with his own stone. In Rows 5 & 6, is Sarah Elizabeth, dau of John and Ann d. 24 Feb 1847, age 3 years, 11 months, 25 days. This appears to be the John Smith who married Ann Holton 13 Dec 1827. John leaves a will in Jefferson County, 1874 naming 1) Anna as his wife, 2) sons: Joseph, William, and “heirs of deceased son Samuel” [d. 1873], and 3) daughters: Mary and Susan Smith. The 1840 census for John Smith includes John, age 30-40; [Anna], age 40-50; 3 males: one 10-15 and two under 5; and 3 females: two age 5-10 [Mary and Susan], one under 5 [d. 1847]. There is no room for your John T. Smith in this family. And since the will names heirs of Samuel, dec’d there is no logic to assume that because your John was already dead, there
is no mention of him or his heirs at the time of his death. However, a man may name whomever he pleases in his will. Leaving a child out opens the way for a legal claim against the estate—which is a court process. Court records have not been searched yet.

2. **William Smith died 1843**, age 46 year, 1 month, 23 days; his wife Ann M. Smith born 1793, died 1860 buried in Flat Bottom Cemetery. **Rows 5 & 6.** [Some sources list her as Anna Marie, some as Ann Merrell Smith.] In 1840, William Smith resides in Shelby Township, Jefferson County IN, age 40-50; [Ann M.] 40-50; an elderly female [Susannah] age 80-90; 3 males: one 10-15 and two 15-20; 1 female age 5-10. These males cannot include James H. because he was also on the 1840 census with a household full. In 1830, the three males were under 5, 5-10, and 10-15. A William Smith registered his stock mark 3 Feb 1819. On pedigree charts, a marriage between William Smith and Anna M. Tull is recorded as 18 Dec 1818 [1819 on some] in Woodford County KY.

3. **Susanna Smith wife of James Smith, d. 1845,** in her 85 th year. **Rows 5 & 6.** In the *Hoosier Journal of Ancestry* there is a list of “early settlers” who include “old Joshua Tull” and “Old Jimmy Smith.” A James Smith also registered his stock mark 17 June 1817.

These stones may constitute a family cemetery plot. Plots usually take up a vertical space over more than one row. If this is true, then there is high likelihood that all these Smith graves are connected by kinship. Depending upon where in the row, James H. Smith and his group are found, they may be part of the same plot or nearby—because the deaths in Row 7 were a little later.

4. **James H. Smith born 1821,** died 1899. Catherine Smith born 1825, death blank. Margaret Smith, born 1849-died 1889. Listed as group on **Row 7.** In a biographical sketch, James is listed as born 1821 in Woodford County KY, son of William Smith born Maryland and Anna M. Tull. James married Catherine Overturf of German descent from KY. There is a disjointed sentence that “Mr. James Smith is of Scotch-Irish descent.” [Does this bring another distinct James into the bio?] James H. and Catherine have 6 children: Elizabeth A., William W., Sylvanus G., Mary E., John S. (a physician in Cass County IN), and James H. I charted these data from the biographical chart on a family group sheet and a separate pedigree chart. James H. is recorded by some as James HANDY Smith, after Anna Tull’s father, Handy Tull.

How much of the population is included in each record you searched? Where can omitted groups be documented? Rarely is the whole population included in one record—even census and tax rolls may omit segments of the population.

**Step Five: Re-Survey on New Surnames and New Ancestors**—Is the genealogy of these new ancestors already compiled? Each new ancestor added to your pedigree needs a survey to see if someone has already traced their lineage. You have no way of knowing when you can tie into the work of others. Review the sources and records you checked when you first started your research work—personal and family records, compiled sources. Each new ancestor found opens up a whole new reservoir of relatives and family friends, especially distant or unknown cousins and “old timers,” who are knowledgeable on the local communities and the families that resided there.
Arlene Eakle’s Genealogy Blogs--Genealogy, tracing ancestors, writing family history, multiple streams of genealogy evidence:

__Genealogy Evidence
__Kentucky
__New York
__Scots-Irish
__Tennessee
__Virginia

Resources galore for this **Step Five: Re-Survey** are presented in detail on my blogs. I invite you to check them out and to subscribe by RSS feed or email. Let me share with you examples of these survey sources from my blogs:

**Searching Newspapers Online and your Genealogy** (Posted February 11, 2012 in *Genealogy Evidence Blog*) Newspapers have always been a challenge: to find and to search. Originally newspaper indexes, where they existed, were on 3X5 cards in local libraries. A few only were in print. So you had to begin on page 1 and search page-by-page seeking information on your ancestors. Now we have several projects that microfilm, preserve, index, and provide **online access** to newspapers:


**Abstracts** of newspapers, mostly American state and county papers. The abstracts are submitted by volunteers researching their own family backgrounds. [http://www.newspaperabstracts.com](http://www.newspaperabstracts.com) Click on your state or county.

**Access Newspaper Archive**. [http://access.newspaperarchive.com/default.aspx](http://access.newspaperarchive.com/default.aspx) Called the “world’s best resource for newspaper articles” by FamilySearch. Click on your specific state of interest for a list of newspapers searched for each state, including Alaska and Hawaii. Newspapers are also available for Canada, China, Denmark, Germany, Ireland, Jamaica, Japan, South Africa, United Kingdom, France, U.S., Virgin Islands. You can also search a specific year or surname, specific newspapers.

**ProQuest Obituaries**. Search obituaries in:

1. Atlanta Constitution (1868-1922)
2. Boston Globe (1872-1922)
3. Chicago Defender (1921-1975)
4. Chicago Tribune (1852-1984)
5. Los Angeles Times (1881-1984)
7. Washington Post (1877-1950)

http://obituaries.proquest.com/obitsweb/obits/ Access through your local public library databases.

**Obituary Archive.** [http://www.obitsarchive.com](http://www.obitsarchive.com) Includes both obituaries and death notices in newspapers across the country. 2775 titles are searched. You can also click on U.S. regions to narrow your search.

**Live Roots Search Engine.** Over 241,000 resources are located by website address and sometimes indexed on this genealogy search engine. Check out this step-by-step tutorial “Finding Resources with LiveRoots.com,” by Nancy Hendrickson. The article is a PDF download for $1.99 from [http://www.shopfamilytree.com/product/9935](http://www.shopfamilytree.com/product/9935).

Most of these newspaper databases are free. A few include free index searches and a charge for copies of the articles and entries. I found my Mom and her frequent ads selling all kinds of stuff [even a Porsche engine!] and my Dad’s work with the Boy Scouts and my uncle’s church service and my cousin’s attendance at a bridal shower. Don’t miss these often unknown glimpses into the lives of your family members and ancestors—search the online newspaper databases.

**One Response to Searching Newspapers Online and your Genealogy:** Pingback: [Online obituaries and death notices at Obituary House. Find local and national obituaries news, personal tributes and funeral announcements here at Obituary House online!](http://obituaries.proquest.com/obitsweb/obits/)

**Some Other Compiled Records:**

There is a large “Washington County Pennsylvania Early Marriage Index,” with more than 30,000 names compiled by the Citizens Library Genealogical Records Group. The index was compiled from a variety of sources—church records, Bibles, newspapers, ministers’ marriage returns, and bonds found in the genealogy collection at Citizens Library, Washington PA. Jean S. Morris printed a corrected source list in the [Western Pennsylvania Genealogical Society Quarterly](http://www.wpgs.org). It is a model for the many records that can supply marriages, and her corrected source list will enable you to find the source for those marriages of interest to you.

**Historic New Orleans Cemetery Survey.** Each tomb and tombstone in greater New Orleans has been photographed and transcribed. A series of indexes provide access—the master index names every individual and family buried in nine cemeteries. Women are indexed by both maiden name and married name(s). Society tombs for benevolent and fraternal organizations are indexed separately. Other indexes include countries of origin, occupations, causes of death, cemetery architects, tomb builders, and stone carvers who signed tombs. Index entries include the cemetery and tomb or wall vault number. This information indexes the photographs, the inscriptions, and other information for each burial. Available Historic New Orleans Collections, 533 Royal Street, New Orleans LA 70130. 153 boxes, 47 maps, 11,525 items. Originals and microfilm copy-- Survey of Historic New Orleans Cemeteries, MSS 360, Williams Research Center, The Historic New Orleans Collection.