

# Beginning Genealogy

## Step 1: Write Down and Organize What You Know

By Lois Mackin

In my column in the Spring 2010 issue of *Minnesota Genealogist*, I outlined five steps for beginning genealogy:

1. Write down and organize what you know,
2. Decide what you want to learn,
3. Locate a useful source,
4. Learn from the source, and
5. Use what you learned.

These five steps are the building blocks of the MGS Beginning Genealogy Course. In this issue, I will focus on Step 1: Write Down and Organize What You Know. This is a step that you will revisit many times during your genealogy journey! Performing it thoroughly, thoughtfully and systematically pays huge dividends.

As part of this first step, you will need to:

- Collect and assemble family documents, photos and memorabilia,
- Set up a system of binders, files and/or electronic files to store the records you have,
- Develop a system for preserving fragile or irreplaceable materials, and
- Create pedigree charts and family group sheets.

I suggest that you start by **collecting and assembling documents, photos and memorabilia about your family** in one place. Don't worry at this point about finding more information—just collect what you already have in your own home or can easily obtain from relatives. These materials, often referred to as "home sources," will be the foundation of your work. "Home sources" often contain information you won't easily find elsewhere, so look at them thoroughly and put them in order before you rush off to the library or the Internet!

Start with your own vital documents—birth and marriage certificates, baptismal or confirmation records, school records, military records, letters, diplomas, keepsakes. You may have records from your spouse, parents or other family members—collect those too. Carefully record information about documents or artifacts—"This family Bible came to me from my great-aunt Matilda Smith Emery. Aunt Matilda said it was brought to America by her grandmother Lucy Smith in the 1800s." Don't trust your memory—write everything down.

**Setting up a system.** As you collect materials, put them in labeled bins, file folders or binders. Many people like to divide up their folders or binders by family or surname. How many "containers" you create depends on how much material you have! If you don't have a lot, "Mom's side" and "Dad's side" may be good enough subdivisions. Some people like to start with a "container" labeled with each grandparent's surname. You can always subdivide the "containers" as the volume of your materials grows.

Your system can also be electronic, or a combination of electronic and paper-based. You can scan documents you find into your computer. If you do, set up a consistent system for naming the files - for example, *Jones\_Elizabeth\_1950\_Birth.jpg* - and put them in appropriate electronic file folders. It's best to set up a folder—perhaps in your *Documents* folder - called *Genealogy* (or whatever you like) and put all your family history materials there. You could set up a separate folder for *Jones\_Elizabeth* inside your *Genealogy* folder, or just a *Jones* folder where you put all the files related to the Jones family.

There are as many systems for storing materials as there are genealogists. Find one that works for you and lets you access your information quickly and efficiently, not a system that's right for someone else.

**Preserve fragile or irreplaceable materials.** Some of your "home sources" will be fragile or unique. Make copies of these irreplaceable items for your working files and store the originals separately—preferably in a fireproof container or safe deposit box. Never take original materials with you to a library or courthouse—take only the copies.

Look for reliable information about preserving your family history materials and artifacts at the Minnesota Historical Society's website <[www.mnhs.org/preserve/conservation/index.html](http://www.mnhs.org/preserve/conservation/index.html)> and *Practical Archivist* <[www.practicalarchivist.com](http://www.practicalarchivist.com)>; Gaylord <[www.gaylord.com](http://www.gaylord.com)>, and Hollinger Metal Edge <[www.hollingermetaledge.com](http://www.hollingermetaledge.com)> are good-quality providers of archival supplies.

Remember that not all genealogical sources are physical items or documents—some of the most valuable "home sources" are people who can tell you about your family. Tap these sources, starting with yourself. Jot down

or record on your computer your own recollections about your life, your parents' lives and your relatives. Interview parents, siblings and cousins and take notes. Always date your personal notes and interviews—in the future you will want to know when you acquired the information, as well as from whom you got it.

**Creating pedigree charts and family group sheets.** Pedigree charts and family group sheets are standard ways genealogists record and display information about individuals, relationships and families. Pedigree charts show lineage (parent-child relationships) for individuals. Family group sheets show family groups—parents and children.

Download blank forms from the Internet—look for free family group sheet forms at *Rootsweb.com*, *Ancestry.com*, and *FamilySearch.org*. *FamilySearch.org* also offers

free blank pedigree charts. Many genealogy database programs can generate blank forms or automatically fill in forms with your family history data.

Always record the sources of your information. Most genealogy database software makes it easy to do as you enter data. If you are filling in charts by hand, just include the source information for each fact in a footnote.

Step 1 is never really “finished”—you will revisit it each time you add to your knowledge or acquire new materials. If you are careful and systematic, Step 1 will provide a solid foundation for your genealogical endeavors. Having finished Step 1, you will be in good position to formulate a research question – my topic in the next issue.

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For registration details, visit <[www.mngs.org](http://www.mngs.org)>