Chapter 1

Planning for Genealogical Success

● ●

In This Chapter

▶ Using the Helm Family Tree Research Cycle

▶ Taking your time

● ●

*A*ll great projects start with a plan, right? Starting a genealogical project is no exception. A well thought-out plan can help you make efficient use of your time and keep you focused on the goals that you have set for a particular research session. Now, we realize that not everyone enjoys coming up with a plan. Finding your ancestors is the fun part — not the planning. So, to help speed things along, we've come up with a basic process that we hope helps you make the most of your research time.

This chapter covers some of the basic things to keep in mind when you begin your research journey and offers some tips on what you can do when you hit research bumps along the way. Also, we provide some hints on how to select that first ancestor to kick off your genealogical pursuit.

Introducing the Helm Online Family Tree Research Cycle

No book on research would be complete without some sort of model to follow, so we created one just for you. Of course, wanting to take credit for our fabulous model, we like to call it the *Helm Online Family Tree Research Cycle.* Sounds impressive, doesn't it? Well, we have to admit that most of it is common sense. Figure 1-1 shows the five phases of the cycle: planning, collecting, researching, consolidating, and distilling.

Sticking with the *family tree* motif here, we liken the cycle to the steps you take to plant and sustain a tree:
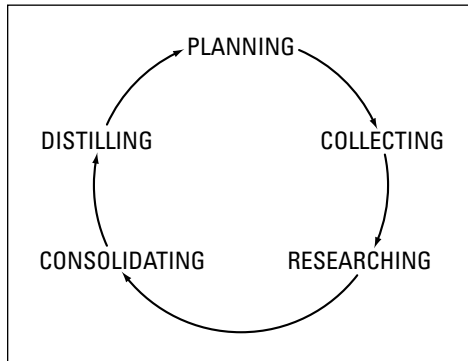

Figure 1-1:
The Helm
Online
Family Tree
Research
Cycle.

The figure shows a circular diagram. Starting at the top and moving clockwise: PLANNING → COLLECTING → RESEARCHING → CONSOLIDATING → DISTILLING, returning to PLANNING.

✔ **Planning:** The first step in planting a tree is figuring out what kind of tree you want and then finding a good place in your yard for the tree to grow. This step in the cycle is the *planning* phase. In genealogy, you want to select a family that you know enough about to begin a search and then think about the resources that will provide the information that you're looking for.

✔ **Collecting:** After you plan for the tree, you go to a nursery and pick a suitable sapling and other necessary materials to ensure that the tree's roots take hold. The second phase of the cycle, *collecting,* is the same — you collect information on the family that you're researching by conducting interviews in person, on the phone, or through e-mail, and by finding documents in attics, basements, and other home-front repositories.

✔ **Researching:** The next step is to actually plant the tree. You dig a hole, place the tree in it, and then cover the roots. Similarly, you spend the *researching* phase of the cycle digging for clues, finding information that can support your family tree, and obtaining documentation. You can use traditional and technological tools to dig — tools like libraries, courthouses, your computer, and the World Wide Web.

✔ **Consolidating:** You planted the tree and covered its roots. However, to make sure that the tree grows, you put mulch around it and provide the nourishment the tree needs to survive. The *consolidating* phase of the cycle is similar in that you take the information you find and place it into your computer-based genealogical database or your filing system. These systems protect your findings by keeping them in a centralized location and provide an environment in which you can see the fruits of your labor.

> ✔ **Distilling:** After your tree has taken root and begins to grow, you need to prune the old growth, allowing new growth to appear. Similarly, the *distilling* phase is where you use your computer-based genealogical database to generate reports showing the current state of your research. You can use these reports to prune from your database those individuals you've proven don't fit into your family lines — and perhaps find room for new genealogical growth by finding clues to other lines you want to follow up.

We think that using our research model makes looking for genealogical information a lot easier and more fulfilling. However, this model is merely a guide. Feel free to use whatever methods work best for you — as long as those methods make it possible for someone else to verify your research (through sources you cite and so on).

Planning your research

The Internet puts the world at your fingertips. Discovering all the wonderful online resources that exist makes you feel like a kid in a candy store. You click around from site to site with wide eyes, amazed by what you see, tempted to record everything for your genealogy — whether it relates to one of your family lines or not.

Because of the immense wealth of information available to you, putting together a research plan before going online is very important — it can save you a lot of time and frustration by keeping you focused. Tens of thousands of genealogical sites are on the Internet. If you don't have a good idea of exactly what you're looking for to fill in the blanks in your genealogy, you can get lost online. Getting lost is even easier when you see a name that looks familiar and start following its links, only to discover hours later (when you finally get around to pulling out the genealogical notes you already had) that you've been tracking the wrong person and family line.

Now that we've convinced you that you need a research plan, you're probably wondering exactly what a research plan is. Basically, a *research plan* is a common-sense approach to looking for information about your ancestors online. A research plan entails knowing what you're looking for and what your priorities are for finding information.

If you're the kind of person who likes detailed organization (like lists and steps that you can follow to the tee), you can map out your research plan in a spreadsheet or word processor on your computer or you can write it out on paper. If you're the kind of person who knows exactly what you want and need at all times, and you have an excellent memory of where you leave off when doing projects, your research plan can exist solely in your mind. In other words, your research plan can be as formal or informal as you like — as long as it helps you plot what you're looking for.

For example, say you're interested in finding some information on your great-grandmother. Here are some steps you can take to form a research plan:

1. **Write down what you already know about the person you want to research — in this case, your great-grandmother.**

   Include details like the dates and places of birth, marriage, and death; spouse's name; children's names; and any other details you think may help you distinguish your ancestor from other individuals. Of course, it's possible that all you know at this time is great-grandma's name.

2. **Conduct a search using a genealogically focused search engine to get an overview of what's available.**

   Visit sites like the TreEZy (`www.treezy.com`) to search for information by name and location. Using great-grandma's name and the names of some of the locations where she lived provides you with search results that give you an idea of what kind of resources are available. (Chapters 3 and 4 go into more detail about online trips and searching for this type of information.) You may want to make a list of the sites that you find in your word processor, spreadsheet, or on a piece of paper, or download the Web page for offline browsing.

3. **Prioritize the resources that you want to use.**

   Your search on a genealogically focused search engine may turn up several different types of resources, such as newsgroups, mailing lists, and Web sites. We recommend that you prioritize which resources you plan to use first. You may want to visit a Web site that specifically names great-grandma prior to signing up for a mailing list for all researchers interested in great-grandma's surname.

4. **Schedule time to use the various resources that you identify.**

   Genealogy is truly a lifelong pursuit — you can't download every bit of information and documentation that you need all at once. Because researching your genealogy requires time and effort on your part, we recommend that you schedule time to work on specific parts of your research. If you have a particular evening open every week, you can pencil in a research night on your calendar, setting aside 15-30 minutes at the beginning to review what you have and assess your goals, then spending a couple of hours researching, and ending your evening with another 15-30 minute review in which you organize what you found.

Collecting useful information

After you generate a research plan (see the preceding section, "Planning your research," for more information), you may need to fill in a few details like dates and locations of births, marriages, and deaths. You can collect this information by interviewing family members and by looking through family documents and photographs. (See Chapter 2 for tips on interviewing and using family

documents and photographs.) You may also need to look up a few things in an atlas or *gazetteer* (a geographical dictionary) if you aren't sure where certain locations are. (Chapter 7 provides more information on online gazetteers.)

For a list of things that may be useful to collect, see Chapter 2. In the meantime, here are a few online resources that identify items to collect for your genealogy:

✔ **Suggestions for Beginners**

www.ngsgenealogy.org/edugetstart.cfm

✔ **Introduction to Genealogy: First Steps**

genealogy.about.com/library/lessons/blintro2a.htm

✔ **Getting Started in Genealogy and Family History**

www.genuki.org.uk/gs/

✔ **Get Started in Genealogy: Some tips on how to start your family tree research**

genealogy.suite101.com/article.cfm/get_started_
in_genealogy

Researching: Through the brick wall and beyond

Of course, researching your family history online is the topic of this entire book, so you can find the necessary resources to do a great deal of your online research in these pages.

A time will undoubtedly come when you run into what genealogists affectionately call the *Brick Wall Syndrome* — when you think you have exhausted every possible way of finding an ancestor. The most important thing you can do is to keep the faith — don't give up! Web sites are known to change frequently (especially as more people come online and share their information); although you may not find exactly what you need today, you may find it next week at a site you've visited several times before or at a new site altogether. The lesson here is to check back at sites that you've visited before.

Another way to get past the brick wall is to ask for help. Don't be afraid to post a message on a mailing list or e-mail other researchers you've corresponded with in the past to see if they have answers or suggestions for finding answers. We provide more information for using mailing lists and e-mail in Chapter 4.

Fortunately, there are also suggestions posted online on how to get through that brick wall when you run up against it. Check out these sites:

- ✔ **Breaking Down Walls, Brick by Brick: The Search for Henrietta:** `genealogy.about.com/library/weekly/aa042602a.htm`

- ✔ **Brick Wall Research:** `genealogypro.com/articles/` `brick-wall-research.html`

- ✔ **Brick Wall Genealogy Solutions: A Family Heritage Resource:** `www.workingdogweb.com/Brick-Wall-Genealogy.htm`

Consolidating information in a database

After you get rolling on your research, you often find so much information that it feels like you don't have enough time to put it all into your computer-based genealogical database.

A *genealogical database* is a software program that allows you to enter, organize, store, and use all sorts of genealogical information on your computer.

When possible, try to set aside some time to update your database with information you recently gathered. This process of putting your information together in one central place, which we call *consolidating,* helps you gain a perspective on the work that you've completed and provides a place for you to store all those nuggets you'll need when you begin researching again. By storing your information in a database, you can always refer to it for a quick answer the next time you try to remember something specific, such as where you found a reference to a marriage certificate for your great-great-grandparents, or where your great-grandfather lived during a particular timeframe.

Distilling the information that you gather

The final step in the cycle is distilling the information that you gather into a report, chart, organized database, or detailed research log that you can use to find additional genealogical leads. Frequently, you can complete the distillation process by producing a report from your computer-based genealogical database. Most genealogical software programs allow you to generate reports in a variety of formats. For example, you can pull up a Pedigree chart (a chart showing a primary person with lines representing the relationships to his/her parents, then lines connecting them to their parents, and so on) or an outline of descendants from information that you entered in the database about each ancestor. You can use these reports to see what holes still exist in your research, and you can add these missing pieces to the planning phase for your next research effort — starting the whole cycle over again.

Another advantage to genealogical reports is having the information readily available so that you can *toggle* back to look at the report while researching online, which can help you stay focused. (*Toggling* is flipping back and forth between open programs on your computer. For example, in Windows you press Alt+Tab to toggle, or you can click the appropriate item on the taskbar at the bottom of the screen. On a Macintosh, you can use the Application Switcher in the upper-right corner of the screen.) Of course, if you prefer, printing copies of the reports and keeping them next to the computer while you're researching on the Internet serves the same purpose.

Selecting a Person to Begin Your Search

Selecting a person sounds easy, doesn't it? Just pick your great-great-grandfather's name, and you're off to the races. But what if your great-great-grandfather's name was John Smith? You may encounter millions of sites with information on John Smith — unless you know some facts about the John Smith you're looking for, we can almost guarantee that you will have a frustrating time online.

Trying a unique name

The first time you research online, try to start with a person whose name is, for lack of a better term, semi-unique. By this we mean a person with a name that doesn't take up ten pages in your local phone book, but is still common enough that you can find some information on it the first time you conduct a search. If you're really brave, you can begin with someone with a very common surname such as Smith or Jones, but you have to do a lot more groundwork up-front so you can easily determine whether any of the multiple findings relate to your ancestor. (For more on groundwork, see Chapter 2.)

Also, consider any variations in spelling that your ancestor's name may have. Often, you can find more information on the mainstream spelling of his or her surname than on one of its rarer variants. For example, if you research someone with the surname Helme, you may have better luck finding information under the spellings *Helm* or *Helms*. If your family members immigrated to the United States in the last two centuries, they may have *Americanized* their surname. Americanizing a name was often done so that the name could be easily pronounced in English, or sometimes the surname was simply misspelled and adopted by the family.

TIP

To find various spellings of the surname, you may need to dig through some family records or look at a site like Table of Common Surname Variations & Surname Misspellings (`www.ingeneas.com/alternate.html`).

Narrowing your starting point

If you aren't sure how popular a name is, try visiting a site like Hamrick Software's surname distribution site (www.hamrick.com/names). At Hamrick's site, you can find the distribution of surnames in the United States based on the 1850 Census, 1880 Census, 1920 Census, and phone books from 1990 to the present. Here's what you do:

1. **Open your World Wide Web browser and go to Hamrick Software's surname distribution site (**www.hamrick.com/names**).**

   The Hamrick site appears with instructions and a form to use for searching.

2. **Type the surname you're researching into the Surname field in the search form.**

   For help choosing a surname, see the preceding section.

3. **Use the drop-down menu to select the year(s) for which you want to see the surname distribution.**

   You can choose 1850, 1880, 1920, 1990, or All Years.

4. **Click Display.**

   A color map displaying the distribution of your surname appears.

Figure 1-2 shows a distribution map for the surname Abell in 1990. According to the map, only one out of every 1,000 individuals uses this surname in two states. In the remaining states, the name is even rarer. This gives you a good indication that the surname Abell is semi-unique. In contrast, during the same year, the surname Smith was held by at least one out of every 300 individuals in each state.

Note: Looking at Figure 1-2, you may find it difficult to determine which two states have one out of 1,000 individuals using the surname Abell because the colors show up as black, white, or shades of gray. If you visit Hamrick's site, the maps come up in color and are easier to read. (And just in case you're curious, the two states were Maryland and Kentucky.)

A good reason to check out distribution maps is that you can use them to identify potential geographic areas where you can look for your family during the years covered by the site. This is especially true for maps generated from 1850 and 1880 Census data. For example, we generated another map on the Abell surname for the 1880 Census. We discovered that the name appeared more frequently in six states than in the rest of the country. If we hit a wall and can't find additional information online about a particular individual or the surname, we know we can start looking at records in these states to find more clues about families with the name and hopefully, by doing so, we'll find our branch.

Figure 1-2: A map of the Abell surname distribution in 1990 from Hamrick Software.

This service is sponsored by **VueScan**, the world's most widely used software for scanners. Download a FREE trial now!

Footnotes

The color of each state indicates how frequently you will find someone with this surname in each state. For instance, if a state is colored red, then 1 in 100 people (or more) in that state have the surname. Similarly, yellow means approximately 1 in 300 have the surname, green means 1 in 1000, and blue means 1 in 10,000 (or less).

Copyright © 2007 Hamrick Software
Last updated February 17, 2007

Choosing someone you know about

In addition to picking a person whom you're likely to have success researching, you want to use a person you already know something about. If you have a family line for which you know some basic information on your great-great-grandparents, use one of their names rather than a name for which you only know a few scattered details. The more details that you know about a person, the more successful your initial search is likely to be.

For example, Matthew used his great-grandfather William Abell because he knew more about that side of his family. His grandmother once mentioned that her father was born in Larue County, Kentucky, in 1876. This gives him a point of reference for judging whether a site has any relevant information on his family. A site is relevant if it contains any information on Abells who were located in or near LaRue County, Kentucky, prior to or around the year 1876. Try to use the same technique with your ancestor. For more information on how to extract genealogical information from your family to use in your research, see Chapter 2.

Selecting a grandparent's name

Having trouble selecting a name? Why not try one of your grandparent's names? Using a grandparent's name can have several benefits. If you find some information on an individual but you aren't sure whether it's relevant to your family, you can check with relatives to see whether they know any additional information that can help you. This may also spur interest in genealogy in other family members who can then assist you with some of your research burden or produce some family documents that you never knew existed.

With a name in hand, you're ready to see how much information is currently available on the Internet about that individual. Because this is just one step in a long journey to discover your family history, keep in mind that you want to begin slowly. *Don't try to examine every resource right from the start.* You're more likely to become overloaded with information if you try to find too many resources too quickly. Your best approach is to begin searching a few sites until you get the hang of how to find information about your ancestors online. And keep in mind that you can always bookmark sites in your Web browser or record the URL in a spreadsheet so you can easily return to them later, when you're ready for more in-depth researching.

Too Many Ancestor Irons in the Research Fire

One last piece of advice: When you begin your research, take your time and don't get in a big hurry. Keep things simple and look for one piece of information at a time. If you try to do too much too fast, you risk getting confused, having no online success, and getting frustrated with the Internet. This result isn't very encouraging and certainly doesn't make you feel like jumping back into your research, which would be a shame because you can find a lot of valuable information and research help online.