

Let the Adventure Begin!

Getting Started in Genealogy

By Bob Alford

Introduction

Are you new to genealogy and trying to determine how to get started, or even undecided if you are up to the task? This paper was written for you. My purpose is to give someone new to genealogy the basic tools and the encouragement to get started. This is not a course in genealogy. There are plenty of those available, and you will find out about a few of them at the end of this paper. This is just the “quick start guide.”

If you have not read the About Genealogy page on our club website, this is worth repeating here:

“Genealogy is a fascinating hobby. It is like a huge puzzle which is never completely solved, but one bit of information leads to another, and it becomes especially exciting when you find a book or a record on the web on one of your family lines that ties in with your current records and gives you names, dates, and places for several generations.

“Genealogy is not just about putting names and dates on a chart, or looking to see if you are related to someone famous and powerful. Our ancestors are our great, great ... grandparents. They were very real people who lived very real lives. They worked and struggled to make better lives for their children, their children's children, and for us. We are their legacy. We are who we are and we are here because of them.

“While most of the details of their lives are lost in the mists of time, most of our ancestors left footprints in history. We know, or can learn, some things about them and what they did, we know some things about the environment in which they lived, and we know what history tells us about the times they lived in. Putting these together and opening our imagination helps us envision what their lives were like.

“Genealogy is about family. We live in a very short window of the historical time line. We know our parents as adults, our grandparents as old people, our children, and our grandchildren as young people. If we are fortunate we may get a glimpse of the beginning of the life of a great grandchild, or the end of life of a great grandparent. That is only a handful of the many generations that have come before us and the many yet to come. Genealogy is about extending our knowledge of our families to those we never met in person, learning who they were, how they lived and what their world was like. Learning about our ancestors enriches and broadens our lives. Someday we too will be someone's ancestors. “

Are you ready? If so, let's get started.

Getting Started

It is not as hard as it may seem, and with the help of the Internet and all the research of those who have gone before you, you will be surprised at how much you find out and how quickly. Like all adventures it is best if you take it one step at a time, and like all adventures you need to start at the beginning.

Start with what you know

Before you start searching the Internet and get discouraged when your grandfather's name only returns entries about some teenager in Texas, or buy any genealogy software you will spend good money on and then may never use, or visit a genealogy library and get completely overwhelmed by the massive amount of information, but can find nothing pertinent to you, start with what you know and what you can gather from family members.

Write down all the names/dates/relations you can think of

Start by taking an inventory. Write down the names and important dates of everyone in your family that you can think of (now what was grandma's maiden name?) Draw a simple chart on paper or on your computer to show the relations. There is no need for you to get fancy yet, these are just notes to organize your thinking and determine what you know and what you need to find out. (Now when did Grandpa die?)

Make notes about places

Note any places you can remember regarding where people lived. If you know the place where your grandparents were married, the chances are good that at least one set of your great grandparents lived nearby and you will know where to look for records. It is the little clues that lead to great discoveries.

Make notes about interesting things you remember

Start to think about what you would say if one of your grandchildren asked about your parents or your grandparents. Make notes on paper or on your PC about highlights of their lives. Again, no need to get fancy, these are just for your use. You are not trying to write a biography at the moment, this exercise is just to jar your memory about what you know and what you don't before you start talking to your family.

Search for old family records

Now is a good time to dig out those old family files. You know, that photo album, notebook, cardboard box, or whatever that you got from your parents and never looked at (or at least not more than once.)

Photos

Old family photos are a treasure, unless you cannot identify who is in the picture. There are always those pictures in the box, undated and unlabeled. Don't throw them away yet, you may figure it out or some relative may know who they are.

I recommend scanning all these into the computer, cleaning them up with photo editing tools, and clearly labeling them (at least the ones you know.) This collection will be useful when talking to family members and encourage them to share any they have with you.

Documents

Do you have your father's high school diploma, your grandparents will, old military discharge papers, old deeds, etc.? These will prove to be invaluable. I recommend you scan these in to the computer as well.

Family Bibles

It was very common in the past for families to record all important dates in their family bible. There is probably no more accurate source of dates than those handwritten entries in a family bible by those who were there.

Talk to Family Members

Once you have your own inventory complete so you know what you know and what you don't, it is time to start asking others who know about your family, especially living relatives, what they have and what they know. Now not everyone has a close relationship with their relatives. I for one had very little to do with my family for years. I had not seen or talked to my cousins in oh say 40 years! Most of my cousins are older than me and it seemed like a good idea to contact them as they would remember my grandparents and I did not. I also contacted my oldest sister and her children who I had not seen in at least 20 years. (Just because you are related does not mean you have to be friends.) It proved to be very worthwhile. It turns out we do have something in common after all, family! One of my nephews had done genealogy research and had names and dates for me. More interesting one of my cousins, who is in his late 80's, took great interest and was especially helpful reviewing everything I did. He also had a collection of pictures left to him by one of my aunts that died many years ago, and he could identify many of the people in old pictures I had that I had almost thrown away.

Ask everyone about genealogy

Contact all of your relatives, tell them what you are doing (or planning on doing) and ask if they have any family history information, if they have done any genealogy research on your family or if they know any family member who has. You may be pleasantly surprised and worse case they will at least know what you are doing.

Ask specific questions you have based on your own family knowledge inventory. Someone will know great grandma's maiden name or where Grandpa was born.

Another great way to engage them is to show them some old family photos. "Have you ever seen this picture of grandma when she was a little girl?" Or "I found this old photo among Aunt Bettie's things. I think the one on the right might be great uncle George, but I am not sure. What do you think?" Pictures are always more interesting than words.

Interview older family members

If you have living relatives that are older than you and/or that may have known some of your family members better than you, ask lots of questions. You may have to probe to get the information, but if they have any memories those need to be captured while they are still able to pass them on.

Ask for copies of old photos and documents

Ask everyone for any old documents or photos they may have. They may be reluctant to send them to you. All you really need are good copies, preferably digital. Try to get those that have them to scan them, but if you find out they have something of interest you may have to go visit them and scan what they have yourself. My brother had a very large cardboard box of old family pictures that my sister had left when she died. I had to go to the east coast and sit at his dining room table with my scanner and notebook computer to get them, but it was really worth it.

Family Reunions

If your family has family reunions this is a wonderful place to gather information. If not, you might consider sponsoring one. I was fortunate in that a cousin who is much closer to the family than me had a family reunion. I went, took some drafts of some biographies I had done, and sat and listened. It was not hard to get them talking about grandma and grandpa and the stories they told were fascinating. In addition several family members who were there sent me photos and documents.

Get Organized

OK, so if you have done all of the above you are probably already organized, but this paper is meant to be read before you start anything. If you already know what you are doing, you don't need me.

Digital or Paper (or both)

This is your first big decision, paper or digital? (or both?)

Paper

Traditionally genealogy was all done on paper (of course.) There are recommended forms and ways to organize your data on paper that have been developed over the years and work well. You will find forms recommended by speakers we have had at past club meetings on the resources section of the Trilogy Genealogy Club website. If you prefer to use paper and notebooks, these will work well for you.

Digital

This is the age of computers and there is no shortage of software available for genealogists. Unfortunately a lot of this software just focuses on collecting names and dates and drawing charts. It is still useful, even if you want to get much more out of your research, and it works well for many people. Alternatively you can use standard office tools you may already have and know how to use, or you can use some combination, as I do.

Paper in a digital world

Even if you use a digital approach, paper may have a place. Here are two good reasons:

1. If you have relatives who are, shall we say "technology challenged" (as I do), having printable documents allows you to share with them.
2. (This is the big one.) Do you remember 9 track tape, 8 inch floppies, cassette tapes, Zip disks, 5.25 inch floppies and now 3.5 inch floppies? What do they all have in common? They were

used to save important computer files for the future. Can you read any of them today? If you can, do you have the software that knows what to do with the data? An important part of this grand adventure of exploring your family history is to document it for the benefit of future generations. Do you really expect your great grandchildren to be able to read your computer files, much less know what to do with them?

Ah, but the Internet will be there you say. Will it? In 1995, which is not that long ago, I attended the organizational meeting of the W3C at MIT. There were about 80 of us in the room and we represented the less than 500 people in the world who knew what HTML was. That meeting was the birth of the World Wide Web. Al Gore was nowhere in sight, and even Netscape came later. That makes the Web a mere teenager!

Since then the formats used on the web have changed dramatically. Add to that the fact that to keep files up on the Internet costs money. It requires servers that must be maintained. I hope the world will always have something like the Internet, but I fully expect it to evolve. The Internet of the future will be something we cannot even imagine today. If you had asked any of us in that room sixteen years ago what the Internet would look like is sixteen years we would not have even come close. We had no idea!

One might argue that the new formats for eBooks will last. After all millions of volumes are being digitized. Well maybe, but I would not bet on it and I will bet that the people digitizing all those books are keeping the hardcopies as backups.

Paper is the longest lasting media there is. It can last for hundreds of years. Short of carving your family history in stone (not recommended) it is probably the best way to preserve what you do for the long term. If there were a paper copy (or two) that you could give to your children, and they gave to their children..., well just imagine if your great grandfather had done this and passed it down to you. Wouldn't that be a family treasure?

Why is this important to consider now? Because if you create information only in a database or online in a non-printable on-line file, how will you preserve it? I don't mean to suggest that you don't do everything digitally if that is what suits you. I do. Just be sure that you have a way to print out your final product or products and that you keep a paper copy as the ultimate backup.

Software

OK, now that you know not to run out and buy the first software that you hear of, we need to talk about software for genealogy. There are a lot of packages available. As I see it there are three basic approaches:

1. A genealogy software package that runs on your PC. You buy a copy and install it just like any other software you might buy. Most include a database tool to record your data and a graphics tool to automatically generate charts.

2. An online (in the cloud) solution. Most require a subscription fee, but offer a lot of additional capability that you will not get with a PC package. These include research tools, databases, and articles on genealogy, and in some cases the ability to tie your family tree in with others.
3. The third choice is to just use office tools, like a good word processor, and standard graphics and web tools to do the job your own way.

Choosing the right tool for you will depend very much on what you want to achieve. If, like my nephew, your goal is to collect as many names as dates as you can, and to have a tool that will automatically create the relationship or pedigree charts, any of the many PC packages will do. If you like the idea of everything in the cloud, investigate the many web sites that provide this. If your goal is to develop a family history with the focus on biographies and history to tell the story (my personal approach), you might be better off using standard office tools and perhaps creating a web site to share your results with your family. The choice is yours. My only advice is to think carefully about what you want to do, and evaluate the options available, before you spend any real money.

PC Software

There are many PC software packages out there. Probably the best known packages are Family Tree Maker and Legacy. Family Tree Maker is actually owned by Ancestry.com so it provides links into the site. I own a copy of this software. My nephew chose it and I have a copy so I can read his database. I can honestly say that it works as advertised and for what it does, it works fairly well. In my case it does not do enough to be very useful other than for sharing data with him. I prefer Legacy, but I also use a lot of office and web tools.

Family Tree Maker and Legacy are available from Internet sites for about \$39. If you attend a genealogy conference you can see all the tools available and usually purchase them at a discount. I paid \$20 for my copy of Legacy including a disc and a manual.

The site below compares the top ten packages of this type. It has a good feature matrix that allows you to compare what they do.

<http://genealogy-software-review.toptenreviews.com/ppc-index.html/>

This is a Wikipedia page that compares genealogy software. It lists free software as well as commercial packages. The matrix is somewhat more technical, and may be confusing.

http://en.wikipedia.org/wiki/Comparison_of_genealogy_software

Be sure the package you choose provides the functionality you want. Remember for all of these packages the database you create is on your computer and it is your responsibility to back it up to prevent loss.

In the Cloud

There are numerous sites which offer cloud based solutions. The most well known (best advertised) is Ancestry.com. With cloud based solutions you enter your data much as you would with a PC application,

except that the data is stored on the vendor's servers instead of your PC. There are several advantages to this approach:

1. You are not responsible for backing up your data. You never need to worry about your computer failing and you can replace it anytime you want to without being concerned about saving and moving the database.
2. You can access your data from any computer. If you are at the genealogy library and find something great, you can use their computers and access your data exactly the same way you would from home.
3. In most cases you are part of a much bigger database. If other people share your ancestry, even if you do not know them, you get access to their data.
4. Usually, as in the case of Ancestry, the vendor has accumulated other genealogy data from many sources and you can search that data to find information.

There are also disadvantages:

1. Most, but not all, of these sites are subscription based. You pay every month or every year. If you don't pay you will lose your data unless you have done something to secure it. Ancestry is currently \$9.95 per month for US data and \$19.95 for worldwide data, if you pay annually. The price is higher on a month by month basis. That can add up and is much more expensive than a PC based solution.
2. The data on these sites comes from a lot of sources and in most cases is not verified. The vast majority is good, and some of it is from very valid sources such as the census (available on Ancestry.) However you must be very careful that you know where they got the data from. If it is not from valid, certifiable source, treat it as a clue, not fact.
3. The capabilities of these sites in regards to storing your own family data vary. Some are very limited and can only store names and dates. Some allow more detailed data to be attached.

Here are some other web sites offering cloud based solutions that you might want to look into. While none of these can compare to Ancestry.com in terms of size and breadth, some of them are free and may do what you need. Please note: I am not a user of any of these sites, nor do I subscribe to Ancestry.com. The Trilogy Genealogy Club has several members who subscribe to Ancestry.com. If you are interested in Ancestry.com and willing to pay the price, you might want to seek them out and learn from their experience.

www.MyHeritage.com

www.werelate.org

www.wikitree.com

www.geni.com

www.sharedtree.com

www.OneGreatFamily.com

www.phpgedview.net

Which one is best for you largely depends on you. You be the judge.

My personal opinion is that the cloud is the way of the future. I am not willing to pay a high subscription fee however and I want my data completely under my control. I believe that cloud based solutions that do this are coming. They will be cheap, or close to free, and will insure that data is secure and as private or as public as I choose. I do not use the cloud for my genealogy data at the moment because I don't think they are quite there yet. That does not mean that Ancestry or one of the others is not the perfect solution for you. As I said, you be the judge.

DIY

The do-it-yourself (DIY) approach is not for everyone. In fact it is probably only for a few hardy (or foolish depending on your point of view) souls who march to the beat of a different drummer, and who find the off-the-shelf software packages, either on the desktop or on the web, don't quite do it for them. Since I am one of those people I will explain why I went this route and what tools I use. I am not alone in this camp, but others may do it for different reasons and have different methods. I am not even recommending this approach; I am just sharing what I do with you.

Why DIY?

Why would anyone not use these great tools? In my case I see them as too limiting. They are mostly about names and dates, and I am interested in family history, not just names and dates. My goal from the beginning was to learn all I could about my ancestors, how they lived, what they did, etc. With that information I wanted to tell the family story to my children, my cousins, and more importantly to generations yet to come. Some of the tools, including Legacy, come close, but I want to do it my way.

I was fortunate to have some family history left to me by my father, and some names and dates from my nephew. Initially I was just going to clean up and enhance what my father had left me, but when I got into it I discovered that I could go much further than he did thanks to the Internet.

I started out developing biographies, and found that I enjoyed doing it. My initial plan was just to put these in a notebook and give it to my kids, but when I approached my cousins looking for information they expressed a lot of interest. I decided the best way to share with everyone was by using a web site. Today you can see that site at www.rtreeoflife.com. I am currently working on a major revision to this site which will make it much easier for me to expand and maintain. In the meantime I have collected information on quite a few ancestors that are not shown on the site yet and when the new site is ready I will get back to writing and posting biographies.

Tools I use

- Legacy – Mostly as a central repository for names and dates and as a research aid.
- Microsoft Word – for taking notes and writing documents, including biographies.
- Arcsoft Photo Studio – for picture editing and image enhancement (like Photoshop).
- Microsoft PowerPoint – For some graphics creation.
- Techsmith Snagit - For image capture from the screen and annotation.
- Adobe Dreamweaver – For creating Web Pages
- Adobe Fireworks – For creating Web Graphics
- MySQL, Javascript, php for Web 2.0 things

Unless you are heavy into web design the last three bullets are of little interest to you.

Researching

“Research, that sounds like work!” Well it can be, but it can be fun. The good news is you are not alone in your quest. Others have gone before you and there are literally millions of people today involved in some sort of family history research.

I spent most of my career in software development. The first rule of software development is: get someone else to do it, or better yet, find someone else who has already done it. The same can be said of genealogy. We are all related at some level. If you can find others who have done and recorded research on parts of your family tree they can move your own efforts forward by leaps and bounds. Just be careful with any data you get from anywhere that is not sourced back to an official and reliable source of some kind. Genealogists make mistakes and those mistakes can take on a life of their own in the networked world. Treat everything that is not sourced as a clue rather than a fact.

On Line

The Internet has proven to be a wonderful tool for genealogy research. There are thousands of websites out there with useful information on them. A great place to start is the resources section of our club website. Under the Internet category you will find links to all types of genealogy resources. Most of these are free. Note that we do provide links to some sites that charge money and we have tried to identify those that do. These links are included for your convenience and they are not a recommendation by the Trilogy Genealogy Club.

In Books

Today many people document and make public their family histories on the web. In the past it was done in books and there are many useful books containing genealogy data, some written hundreds of years ago. You will find a lot of these in digital form on the Internet, but to really look through old books you need to go to a genealogy library. Our own West Valley Genealogical Society Library is a wonderful resource. You can find information about this and other libraries in the resources section of our club website.

Visiting the Old Home Towns

A fun and fruitful vacation can be a visit to old home towns where our ancestors lived. The local town clerks can often show you old records that are not obtainable anywhere else. Most of these people are very helpful and enjoy sharing the records in their care. A good approach is to write ahead to the town clerks of the towns you wish to visit. Tell them what your interests are and make an appointment to visit. You will find things this way that are not obtainable from any other source.

Research Classes and Trips

There are organizations such as the National Genealogical Society and the New England Historical and Genealogical Society that sponsor conferences, workshops, classes and trips. The West Valley Genealogy Society and the Family History Library in Mesa have many classes and workshops. These are very inexpensive and sometimes free. You can find more information about these on our website.

There are also many webinars available on the Internet, many at no cost. NEHGS, NGS, and Legacy are all great sources. You can learn in your own home on your own schedule.

So what are you waiting for?

Here is a list of things to do to get you started:

- 1) If you are not a member yet, join the Trilogy Genealogy Club. In addition to meeting others interested in family history and hearing great speakers, you will get full access to the club web site.
- 2) Watch the three webinars for beginners from NEGHS. You will find links to these on our web site. They only take 10-15 minutes each and are well worth the time.
- 3) Write down what you know about your family history.
- 4) Gather any old family documents and photos you may have.
- 5) Contact family members, let them know what you are doing, ask for old documents and pictures they may have, and take notes about what they say.
- 6) Get organized. If you don't know where else to start, Legacy has a free version of their software that is very functional. You may never need the paid version, and if you do it is inexpensive. You can also transfer the data you put into Legacy into most other genealogy programs.

Enjoy!

Meeting your ancestors for the first time can be a rich and rewarding experience. The more you probe, the more you will learn about who they were and how they lived. You may learn a few things about yourself along the way. Enjoy!