

Effectively Tapping in to Local, County, State Historical Societies and Libraries

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Presentation Description

City, county, state historical societies and libraries are a wealth of knowledge, artifacts, and resources ready to assist in finding your roots. Learn the ins and outs of working with historical societies and how they can extend your research success.

The following material is a compilation of personal experience and resources.

Introduction: Foundations for the Presentation and Paper

The history of a family over many generations lies buried in different sources and places. Like a good detective, the genealogist must search for the pieces of a family's past in those many sources such as books, documents, and manuscripts. The genealogist must also be patient and imaginative, for the search can take years and involve a string of clues that lead to new sources. The facts--names, dates, events--that a genealogist gathers through the years are like pieces of a puzzle. Gradually those pieces can be fitted together to make a picture of a family, its many members, and its unique history.

For many genealogists, historical societies and university and state libraries are a vast reservoir of information, tools, and experts that will enhance and magnify your research by leaps and bounds. As part of the preparation for this presentation, I corresponded via email with societies and libraries throughout the United States and asked several questions. They were:

1. What is the role and mission of the societies and libraries?
2. What perceptions do genealogists have when they first contact you?
3. What resources do you provide genealogists?
4. What perceptions would you like genealogists to have?
5. How can genealogists give back to societies and libraries?

The responses to the questions formed the basis and outline of what follows. This paper is a compilation of the combined experiences and knowledge of historical society and library staffs, genealogists, and resources available throughout the web.

Personal Experience: Interwoven Historical and Genealogical Resources

As a genealogist, I have focused much of the research on records available on-line, in microfilm, and in the Family History Library in Salt Lake City. Naively, I thought I had reached most of the available resources that pertained to my family. Then my perception changed with a trip to the roots of my family— Kentucky, North Carolina, Pennsylvania, Tennessee, and. Virginia. What started out to be a 10-day trip ended up being a month-long discovery of who I am, where I came from and Whose I am.

Prior to my trip, I thought I had done extensive preparation through online searching at the Library of Virginia, spoken with and made arrangements to visit a few county historical societies, and identified where my family lived. I searched my own records to see what information I had and collaborated with fellow family genealogists.

By the end of my trip I had traveled 2,500 miles, taken 12,000 digital images, identified 150,000 plus ancestors from direct and collateral lines; visited and researched university archives and special collections; public and regional libraries; state, regional, and local historical, and ethnic societies; and state, county, and local government agencies. I had also spoken and counseled extensively with subject matter experts, walked the land of my family, visited the graves and cemeteries of my family, found never before known records, and met cousins both of Anglo- and African-American descent.

The result of this experience came about because of interwoven historical and genealogical resources that were dedicated to collection, preservation, and interpretation of artifacts and documents. They included:

- Colleges and universities archives and special collections
- Corporate archives
- Federal, state, and local government
- State, county, local, and ethnic historical societies
- Regional and community public libraries

If I learned one thing, it was simply that it was a combination of all the resources to effectively help me learn and tell the story of my ancestors. I found that each of the organizations had information that was shared by more than one organization; furthermore, I found each had unique and precious elements of my past. Finally and probably most importantly, I found a deep appreciation for the resources of individuals who freely gave of their time, expertise, and donations to acquire collections and make them available. I was also grateful to institutions and organizations for their dreams and vision to coordinate, collect, preserve, and manage the history.

The Mission and Role of Historical Societies, Library Archives and Special Collections

Historical Societies

The mission of historical societies is to nurture and promote awareness and appreciation of state, regional, and local history and culture. This is done through the identification, collection, study, and preservation of materials (i.e., common, rare, and unique) that include printed, manuscript, map, and photographic collections which are made available to the public, researchers, and genealogists. Societies receive over 75 percent of inquiries from genealogists.

Societies can be private or operated as a government agency. If they are managed through government, they will be required to follow all state government rules, regulations, and statutes.

Many historical societies make these collections available through on-site, on-line and inter-library loan resources. The types of services you will see historical societies provide include:

- Public lectures
- Seminars
- Conferences
- Consulting services
- Arrange school and general group tours
- Support scholarly research
- Maintain museums of changing, permanent, and traveling exhibitions
- Operate a research library
- Publish books, magazines, and newsletters

In addition to Historical Societies, there are other categories of “Societies” that can provide a wealth of knowledge and information to the genealogist.

Lineage/Hereditary Societies. A lineage society is an organization whose membership is limited to persons who can prove lineal, documented, descent from a qualifying ancestor. Hundreds of such organizations exist in America, such as who fought in the American Revolutionary War (Daughters of the American Revolution, DAR), who came across the plains as Mormon Pioneers (Daughters of the Utah Pioneers, DUP), or those who arrived on the Mayflower.

Many lineage societies publish books of interest to their members, and of interest to other researchers. These books are found in most major genealogical libraries and can help you determine if a society might have information about a possible ancestor. A good resource to identify such societies includes:

Additional Internet Resources:

Hereditary Society Blue Book

http://members.tripod.com/~Historic_Trust/society.htm

Immigrant and Early Settler Societies. Dozens of societies have been established focusing on specific immigrant groups, or early settlers of some locality. While these societies have an interest in immigrants, they do not always know where any particular immigrant came from in the old country. Their objectives do not include establishing the

immigrant or settler's ancestry, only their descent to current persons. Examples of these societies include:

- Society of the Descendants of the Founders of Hartford (Connecticut), which requires the ancestor be living in Hartford by early 1640.
- Order of Descendants of Ancient Planters, those persons who arrived in Virginia before 1616.
- General Society of Mayflower Descendants, descendants of the Mayflower passengers.
- The Order of the Founders and Patriots of America, (pre-1657) founders who established families in America, among whose descendants, of the same surname line, were persons who fought for American independence in the Revolutionary War.

Some examples of immigration collections include:

- The Balch Institute for Ethnic Studies at Temple University in Philadelphia in transcribing many of the passenger arrival lists of ethnic immigrants.
- The Immigration History Society at the University of Minnesota has collected thousands of ethnic newspapers and other sources dealing with eastern European ethnic groups. Their "Immigration History Research Center" is one of the most significant repositories of research materials for those groups in North America.

European Ancestry Societies. Some lineage societies focus on ancestors who were notable long before the American colonies were established. Therefore, descendants who wish to join need to trace their ancestry back to the immigrant (called the "gateway" ancestor), and then trace that immigrant's ancestry back to the qualifying ancestor in the old country. Usually the qualifying ancestor was part of British royalty or nobility. Examples include:

- Order of the Crown of Charlemagne in the United States of America, which requires documented descent from that early emperor. This means tracing your ancestry back more than 1,000 years.
- Descendants of the Illegitimate Sons and Daughters of the Kings of Britain

Nationality or Ethnic Lineage Societies. These are societies that focus on an entire ethnic group. They gather information, teach their members, and publish stories, findings, and sources, about that group. A small number of such societies, and actually the oldest such societies in America, are true lineage societies. Membership is limited to those persons who can prove descent from an early settler of a specific ethnic group. Examples include:

- Dutch in New York
- Germans in Pennsylvania
- Scots-Irish in the Carolinas

Special Interest Societies. These societies focus on research and archives focusing on specific areas of interest where generally large groups of individuals have interest. For example:

B-26 Marauder Historical Society

The B-26 Marauder Historical Society, the nation's largest organization dedicated to preserving the memory of the accomplishments and importance made by the B-26 Martin Marauder and the nearly 300,000 service personnel during World War II.

<http://www.b-26mhs.org/frontpage/Itemid,131/>

Genealogical Societies

Genealogical societies exist throughout the United States and Canada in every state or province, most counties and many major cities. The people in these societies share the same interest you do: individually discovering a heritage. They gather together, usually monthly, to learn from each other about how to trace their ancestry. They recognize that together they have much more knowledgeable about the ins and outs of family history research than they do individually.

Additional Internet Resources:

Starting points for learning more about or finding societies include:

Genealogical Societies

To locate societies in a specific area or for more information about genealogical societies in general, contact the Federation of Genealogical Societies (FGS). This is an umbrella organization of more than 525 genealogical groups throughout North America.

Federation of Genealogical Societies

P.O. Box 200940

Austin, TX 78720-0940

Phone: 512-336-2731

Fax: 512-336-2732

E-mail: fgs-office@fgs.org

Additional Internet Resources:

Links to State Historical Societies in the United States

<http://www.stenseth.org/us/statehs.html>

The GenWeb Project

<http://www.usgenweb.org/>

Society Hill

<http://www.daddezio.com/society/>

Links to Native American Sources

<http://www.haskell.edu/archive/links.htm>

Genea Search

<http://geneasearch.com/states/statesgenealogy.htm>

Cyndi's List of Societies and Groups Ethnic, Lineage, National, etc.

<http://www.CyndisList.com/society.htm>

Cyndi's List of State Resources

Look under your state of interest and select "societies and groups."
<http://www.CyndisList.com/usa.htm>

University and State Library Archives and Special Collections

The mission of library archives and special collections is to grow, organize, care for, and manage collections of records that are of local, regional, state and national interest - many of which date back to the early colonial period. They are responsible for those items that are especially rare and unique in the Library's collections, including rare books, broadsides, sheet music, photographic images and fine art. These collections are made available to researchers from across the country and the world through on-site, on-line and inter-library loan. In addition to managing and preserving its collections, the libraries provide

- Research and reference assistance
- Consulting services
- Administers numerous federal, state, and local grant programs
- Publishes books, magazines, and newsletters
- Offer the public exhibitions, lectures, and other educational programs

Additional Internet Resources:

America's Historical Documents
<http://www.archives.gov/historical-docs/>

The American Antiquarian Society (AAS)
Both a learned society and national research library of pre-twentieth century American history and culture.
<http://www.americanantiquarian.org/>

State & Regional Library Associations
<http://my.execpc.com/~himmel/associations.html>

Digital History
Access to the history profession's major institutions
<http://www.digitalhistory.uh.edu/resources.html#societies>

Internet Public Library
<http://www.ipl.org/div/subject/browse/hum60.60.00/>

National Union Catalog of Manuscript Collections
<http://www.loc.gov/coll/nucmc/>
The mission of the NUCMC program is to provide and promote bibliographic access to the nation's documentary heritage. This mission is realized by NUCMC production of cataloging, and describing archival and manuscript collections held by eligible repositories located throughout the United States and its territories. The program's mission is further realized by the provision of free searching, via NUCMC gateways, of archival and manuscript cataloging in the RLG and OCLC union catalogs.

National Archives
<http://www.archives.gov/research/arc/topics/genealogy.html>
<http://www.archives.gov/research/arc/topics/genealogy.html#morehints>

Online Books--Archives and Indexes

<http://onlinebooks.library.upenn.edu/archives.html>

Repository of Primary Sources

Listing of over 5000 websites describing holdings of manuscripts, archives, rare books, historical photographs, and other primary sources for the research scholar. All links have been tested for correctness and appropriateness.

<http://www.uidaho.edu/special-collections/Other.Repositories.html>

Virtual Link to WW Museums

<http://vlmp.museophile.com/>

Center for Research Libraries

<http://www.crl.edu/content.asp?11=1>

The Center for Research Libraries (CRL) is a consortium of North American universities, colleges and independent research libraries. The consortium acquires and preserves newspapers, journals, documents, archives and other traditional and digital resources for research and teaching. These resources are then made available to member institutions cooperatively, through interlibrary loan and electronic delivery.

Strategy for Searching Societies and Libraries

As outlined, societies and libraries collect books, manuscripts, reference files, maps, newspapers, photographs and all other items of historical value. The following is an outline of steps you might consider to unlock and find your family's history and genealogy.

Step 1. Consult Handbooks on Genealogical Research

Handbooks on genealogical research offer instruction, advice, and information useful to both beginning and advanced genealogists. Topics covered by these books include getting started; types of records to consult; research in other states and foreign countries; and record keeping. Of particular value are those reference books that are focused on research in the locale of your interest. Look under the headings such as "Genealogy-Handbooks, Manuals, etc."

Step 2. Check Genealogy Surname Card Files

This physical and/or online card file is arranged alphabetically by surname and contains references to births, baptisms, marriages, and deaths. These cards were compiled over the years from newspapers printed before 1850, books, journals, church records, and other sources.

Step 3. Search Family History Files and Published Biographies and Genealogies

The Family History Files contain unpublished notes and charts on lineages specific to the state, region, local and compiled by other genealogists.

Published genealogies are part of the library's book collection and are listed by author, title, and family name in the book catalog. Books giving information on more than one family are cross-referenced under all the important surnames.

Biographical encyclopedias, often published during the nineteenth century to flatter prominent businessmen and politicians, contain valuable genealogical information.

Step 4. Check Books on State and Local History

A wealth of genealogical information is contained in books on state and local history.

Step 5. Search Journals and Periodicals

Often bits and pieces of family history can be found in articles in historical and genealogical journals. A name index often appears at the end of each volume. These are in bound volumes on the library shelves which are sometimes microfilmed and/or put online.

Step 6. Search Original Source Material

Collections include books, manuscripts, reference files, maps, newspapers, and photographs on all aspects of history and people. Not all of their collections are indexed or reproduced online. Contact them for research assistance if you don't find what you are looking for. A detailed overview of the type of source material you can expect to find in your discovery of societies and libraries follows.

A Few Definitions. As you begin working with societies and libraries, you will hear vocabulary used to discuss and describe the type of material you will be researching. The following are a few definitions.

- **Archives.** Archives are usually an unpublished, primary source material that documents the activities of an individual or organization. These unique materials are preserved in an archival setting because the information contained therein has enduring value and /or because they provide evidence of the role and activities of the individual or organization that created them. Archival materials that document the activities of an individual are often referred to as manuscripts.
- **Archivist.** Archivist is a title that is used to describe a person who may be responsible for the management of archival and manuscript collections. An archivist's job may include activities such as appraising, acquiring, arranging, describing, preserving, and providing access to primary sources. By carrying out these activities, archivists serve to protect the authenticity and context of the materials in their care.
- An archivist is often the best person to approach for in-depth information about the collections he or she oversees.
- The terms archivist and curator are often used interchangeably. Archivists may also have additional descriptors in their titles to explain specific areas of responsibility. For example, the University Archivist is the person who cares for the permanent records of the university. A project archivist has been hired to work in a concentrated area, such as a subject area, or on a specific collection.
- **Finding Aids.** Finding aids are tools that assist researchers in locating items in a special collection. A finding aid can be as simple as a listing of folders (often called an inventory or preliminary inventory). A finding aid can also be a complex document that places special collections materials in context by consolidating information about the collection, such as a history or biographical note and a description of the arrangement of the collection.
- **Manuscripts.** Manuscripts are usually an unpublished, primary source material that documents the activities of an individual. These unique materials are preserved in an archival setting because the information contained therein has enduring value and /or because they provide evidence of the role and activities of the individual. In modern usage, the term archives can also refer to the papers of an individual.
- Personal Papers is another term used to describe manuscript material. In the broad sense, a manuscript can refer to any unpublished document. MSS is a common abbreviation for manuscript.
- **Primary Sources.** Primary sources are usually defined as accounts or artifacts generated by an eyewitness or participant in past events. Interpretation and evaluation of these primary sources becomes the basis for historical narrative. Evaluating whether something can be used as a primary source depends on two things:

- Proximity to the source. Ideally the best type of source material comes from a person or process that is closest in time or proximity to the event, person or place under study. Usually the creator of this type of primary source is an eyewitness who left a record for personal or procedural purposes. Reliability of sources declines as one gets farther away in time and proximity.
- Questions asked. Determining whether a source is a primary source often depends on the questions asked of it by the researcher.
- **Rare Books.** Rare Books are usually books that are either old, or are unusual and considered valuable due to unique qualities. A book that is old is not necessarily considered a rare book.
- **Secondary Sources.** Secondary sources are completely removed in proximity from the original event, person or place but seek to provide an interpretation based on primary sources. There is a continuum from primary to secondary sources, and many sources show elements of both.
- **Special Collections.** Special collections have characteristics that set them apart from other types of collections in libraries. These special aspects may include:
 - Rarity: books, manuscripts and other materials that are old, scarce or unique.
 - Format: photographs, slides, films, audio recordings, maps, artworks, artifacts and other objects that need special handling.
 - Comprehensiveness: accumulation of materials that are individually not unique, but collectively make up an important resource because of their relevance to a particular topic or individual.

These characteristics also mean that special collections are not readily replaceable and require a higher level of security and special preservation environments to insure their survival. In contrast to museum collections assembled for visual display, special collections focus on research as their primary mission. Thus, they complement general research collections and are often located in institutions that house both kinds of collections.

Step 7. Research Other Libraries

Become aware of all the resources in the state, regional, and local that might have collections for you to research. Simply by asking the society and library reference staff, you will be able to secure a list of resources to consult for your research.

Step 8. Make Your Research Available to Others

Societies and libraries are glad to accept gifts of published books as well as notes and charts relating to research on families from their locale. You can help future researchers by donating copies of your work.

Resources Available at Societies, University and State Libraries, Archives and Special Collections

The following is a brief overview of the type of resources and collections you can expect to find at societies and libraries. Items that are secured and managed are very specific to a community, county, region, and state. While some items may be duplicated across collections, many items are unique and can only be found in specific locations. It then becomes very important that you gain a comprehensive understanding of all the resources that are available to you collectively.

Audio-Visual

Audio-visual recordings are often valued for the authenticity and sense of closeness they bring to the speeches, sporting events, interviews, newscasts, and performances they document. One example you're probably familiar with is, Ken Burns's Baseball or Civil War documentaries. In many cases the media has been digitized and are made available to researchers.

Audio Recordings

Commonly encountered recording media include wax cylinder recordings, recordable disk records, recording wire, open reel-to-reel, cassettes and digital disks. Many of these recordings have been digitized and available for review. Subject matter ranges from music to speeches and presentations.

Bible Records

Bible Records are usually located in Manuscript Collections and include data such as birth, marriage, and death records, most of which were never recorded in official vital records and unavailable elsewhere.

Cemetery Records

Cemetery Records often come in the form of tombstone inscriptions which can often supply exact dates of birth and death, maiden names of women, and family relationships.

Census Records

A government sponsored enumeration of the population in a particular area; and contains a variety of information from names, heads of household or all household members, their ages, citizenship status, and ethnic background, etc.

Federal Census. Compiled every decade since 1790, census "population schedules" are comprehensive, detailed records of the federal government's decennial survey of American households. Information from the schedules is used by the federal government for timely demographic analysis. The schedules themselves, of interest primarily to genealogists, contain the personal information of the survey respondents. To protect the privacy of the people whose names appear in each schedule, census records are restricted for 72 years after the census is taken, and are not available to researchers during that time.

The earliest census records contain information on people born well before the American Revolution, while the 1930 schedules - the most recent ones open to public inspection - contain information on many people who are still living. Using these records, a researcher might conceivably trace a family line from a living person down to an ancestor born more than 250 years ago.

For the years 1790 through 1840, census records listed only the name of the head of the household. Other family members were recorded by number and age. Beginning in 1850, the name of every household member was recorded, along with their age, color, occupation, and place of birth. As other censuses were taken, additional questions were added.

Finding your families in the schedules is not always easy. Parts of the 1790, 1800, and 1810 censuses were missing before filming could be done; many of the schedules are illegible due to poor handwriting, splotches, mildew, faded ink and poor filming processes; and many people were simply missed by enumerators. Researchers should also note that most of the original schedules from the 1890 Census were destroyed by a fire in Washington, D.C. in 1921. Less than one percent of the schedules remain, so it might be difficult finding information on ancestors in that particular year.

Using maps in conjunction with the census schedules is important. State and county boundaries have changed over the years and an ancestor may have lived in the same place for years, but have been enumerated in several different counties. This is also important for urban dwellers as city precincts also changed with time. Use of city directories and books such as those listed in Guidebooks will help provide clues to possible localities.

Non-population Census Records

Agriculture, mortality, and social statistics schedules are available for the census years of 1850, 1860, 1870, and 1880. Manufacturing schedules are available for 1820, 1850, 1860, 1870, and 1880. They are arranged by state, then by county, and then by political subdivision (township, city, etc.). These schedules can add "flesh" to the bones of ancestors and provide information about the communities in which they lived.

Agriculture & Manufacturing Schedules. Agriculture Schedules were taken for the years 1840 through 1910, though the 1890 schedules were destroyed by the already noted fire in 1921 and the 1900 & 1910 schedules were destroyed by an act of Congress. Manufacturers Schedules are available for 1810 & 1820 and 1840 through 1880. The quantity and quality of the data remaining for researchers depends on what has survived both natural disasters and Congressional destruction acts as well as on whether the compilations were totally statistical (as in the case of 1840) or included more identifying information. These schedules are usually not indexed. Agriculture schedules can help fill-in data when tax and other land records cannot be located. They can also complement probate information, more specifically identify property, and assist in distinguishing between individuals of the same name.

Mortality Schedules. List those residents of a county who died during the twelve months prior to the taking of the census. If the census was taken on 1 June 1850, the enumerator would ask who in the household had died between 1 June 1849 and 31 May 1850, and would gather information on name, age, sex, birthplace, occupation and cause of death. With few exceptions, Mortality Schedules survive only for the census years of 1850, 1860, 1870 and 1880. Some are indexed in book form. Others may be indexed on microfiche.

Social Statistics Schedules. Compiled from 1850 to 1880. Among the information these schedules contain, family historians will find the lists of cemeteries within city boundaries, the lists of churches with some accompanying organizational history, and the lists of organizations, societies, and groups most interesting and useful.

Slave Schedules. Lists slaves in the southern states for the years 1850 and 1860. They are arranged in order by state and county with some states having published indexes to facilitate searching for data about a particular owner. Very little information is supplied beyond the owners' names, and the sexes and ages of the slaves.

1890 Special Census of Union Civil War Veterans and their Widows. Was meant to list only Union veterans and widows, but occasionally Confederate veterans were included. This census is available for states from the second alphabetical half of Kentucky to the end of the alphabet. Schedules for Alabama through the first half of Kentucky were destroyed and are not available. Some of these surviving schedules are indexed either in book form or on microfiche.

Other Census/Enumeration Schedules

State Censuses. In addition to the decennial censuses of the federal government, many states also produced their own censuses in the intervening years. State census records really vary from state to state based on what the code required and when the state thought it was important to enumerate its citizens. The state and local enumerations can fill in gaps for when federal census do not exist and when you "just know" the people were in a particular area but the federal census records don't show them. Many researchers have used state and local enumerations to fill in for the 1890 Federal census which burned around 1923.

Local Enumerations. Many cities, towns, and counties conducted special censuses for a myriad of reasons. Some of these local enumerations are found under such titles as school censuses, sheriff's censuses, and a variety of ethnic censuses. Like their state counterparts, many of these are un-indexed. Because they tend to cover more limited geographic areas, though, searching un-indexed local schedules should not be that formidable.

Indian Census Rolls. Indian Census Rolls, compiled by the Bureau of Indian Affairs, between 1885 and 1940.

Church Records

Church registers are often the only way to determine birth and death dates in the years before states started to keep vital records. Most churches keep their own records, but libraries usually have a number of books, copies of church records, a few manuscript volumes of original records, and microfilmed church records. You can request a current list of the churches for which records are available.

Civil Vital Records (Birth, Death, Marriages, Divorcees)

Civil vital records—for births, deaths, and marriages—mark the milestones of our lives, and are the foundation of family history research. Chronicling the personal moments of our lives through the objective perspective of the public record, vital records can offer details often found through no other genealogical resource.

One of the most important details about a birth, marriage or death record is the informant. This person varies and, therefore, the accuracy of the information varies. A parent may give the information on their child's birth record. A bride or groom will usually provide the information for the marriage record and the widow or nearest family member may give information on a death

record. It is also possible for non-related persons to give information on any and all of these types of records. Many records will provide the name of the informant toward the bottom of the form.

Each state has the equivalent of a bureau of vital records. It's generally called the "Bureau of Vital Statistics," "Division of Records and Statistics," "Division of Public Health," "Vital Records Division," or some similar title. No matter the name, the state agency is where you go to obtain birth, marriage and death certificate.

It is important to know that vital record searches are most useful for finding relatively recent information. With some exceptions, most U.S. states did not assume legal responsibility for vital records until around the turn of the last century. The first to start keeping vital records was Massachusetts in 1841 and the last was New Mexico in 1920. Historical Societies become an important resource for vital records prior to the states date of taking legal responsibility for vital records. For example: Nearly two-thirds of Massachusetts towns, for example, have published their early vital records, and Rhode Island has published vital records annually since 1847. It's possible to find marriage records from the early 1600s in some New England towns, and from the early 1700s in counties in the South.

See the following link to find the dates that states took responsibility for birth and death records.

Availability of Death and Birth Certificates by State

<http://www.byubroadcasting.org/ancestors/records/vital/extra2.html>

Birth records. Birth records are primary source records because they are completed at, or close to, the time of the birth by someone who was present at the birth. A birth certificate is usually signed by the doctor or midwife who attended the birth, though that is not always the case. Privacy laws often make birth records the most difficult vital records to obtain. Historical societies may have birth registries for specific areas of the state which often predate birth records.

Marriage records. Marriage records are primary source records because they are completed at, or close to, the time of the marriage by someone who was present at the marriage. A marriage certificate is usually signed by the person who performed the marriage. They are especially valuable to genealogists because they prove that our ancestors were legally married and they often provide us with the maiden name of our female ancestors. Marriages are usually filed with each county court. Some counties may have given their early marriage records to the historical society. Check to see if there is a statewide index. Historical Societies can help outline some of the peculiarities about records at the state such as when it was legally mandated to keep such records or about flaws that may exist in the collection.

Death records. Death records are especially helpful, because they are the most recent record available about an ancestor and may often exist for persons who have no birth or marriage records. The validity of information on death certificates can be a little tricky, however, because information on the deceased individual (other than the time, date and place of death) is provided by someone who knew the deceased (an informant). Therefore, a death certificate is considered a secondary source for information such as the birth place, birth date and parents' names of the deceased. Historical societies do not usually have official records of births and deaths on file. This information is usually kept at the bureau of Vital Statistics. The historical society will have a good handle on where the information is located.

Divorce records. Divorces before the twentieth century were uncommon and in some places illegal. Divorce records contain information on family members, their marital history (including marriage date and place), their property, residences, and dates of other important events such as the children's births. Divorce records are primary source records for the information on property, living children, age of husband and wife and date of divorce and secondary source records for information on the marriage, birth dates of children, etc. Divorces are administered in the court systems, so the process of obtaining a divorce and the location of the ensuing records will vary by country.

Value:

- Useful in proving or disproving other sources
- Gives you a more complete picture of your ancestor
- Helps you distinguish between two people with the same name
- Helps you find clues to earlier life events
- Provides name of informant

Additional Internet Resources:

Records Room

For a state-by-state overview of vital records resources (including the state, CD's, volunteer projects, etc.):

<http://www.recordsroom.com>

Where to Write for Vital Records

<http://www.cdc.gov/nchs/howto/w2w/w2welcom.htm>

Vital Records

For information about availability and cost of state held vital records, print out order forms, and learn where to write to obtain copies:

<http://www.vitalrec.com>

Vital Check

To order state and some county and local vital records online or by phone or fax - or to find phone numbers for them:

<http://www.vitalchek.com>

For state-specific Internet resources:

<http://www.cyndislist.com>

<http://www.byub.org/ancestors/resourceguide>

<http://www.familysearch.org/sg/>

Vital Statistics

<http://genealogy.about.com/library/blvitalus.htm>

Diaries and Journals

Diaries and journals are used interchangeably today. No matter what you call them, these accounts are the autobiographies of ordinary people like your ancestors, and these may be the only existing records of their personal lives. Along with genealogical data, diaries give you a wonderful glimpse into someone's daily life, thoughts, and attitudes. A diarist may also record

feelings on national events, such as a war or its impact on family, and the community. The following is an attempt to define meanings as used over the last several centuries.

Directories

Directories and member lists are the predecessors of the modern-day phone book. They listed the inhabitants of a locality, with their addresses and occupation (and sometimes business address).

Alumni Directory. Alumni directories contain a listing of individuals who attended a particular university, the year that they graduated, and their degree. If you can find information about your ancestor in one of these directories, you may be able to locate other records within the organization which can provide insight into the life of your ancestor.

Business Directory. Business directories usually contain information such as dates and places of birth, dates of marriage, names of children, length of residence in the town, and other valuable information. They are usually organized by county, and depending on the time period, vary in the amount of information they contain. Often, you'll find advertisements for certain businesses in these directories.

Professional Directories. Includes directories for people such as doctors and lawyers. They will most often include information relating to that individual's history in the profession, as well as other biographical information.

City Directory. City directories help you locate where and when a person lived. A city directory can often guide you to other records such as censuses, death and probate records, naturalization records, land records, and church records.

A book listing the names, addresses, occupations etc., of a specific group of people; types include - city, telephone, county, regional, professional, religious, post office, street, ethnic, and school.

Telephone Directory. Most people are familiar with the common telephone directory; they contain addresses and phone numbers. These directories can be quite helpful in locating living relatives or possible relatives with the same surname or a similar surname. The phone company in each city in the United States publishes a directory of everyone in that area who has a phone number.

Value:

- Place an ancestor in a particular place, at a particular time.
- Pinpoint migration years or movement by plotting location on a map.
- Pinpoint year of death (e.g., many times women were listed as "widow of" after their husbands passed away).
- You can use what enumeration district for your ancestor in an un-indexed (e.g., state and local). Can provide occupation that helps to define if "John Jones" really is your "John Jones."

Electronic Discussion Groups

Many societies and libraries sponsor electronic discussion groups. For example, Virginia History and Virginia Genealogy, that are open to interested researchers worldwide.

VA-HIST (Virginia History)

VA-HIST Monthly Archives

VA-ROOTS (Virginia Genealogy)
VA-ROOTS Monthly Archives

Electronic Recordings

Although the majority of archival materials are still paper-based, the amount of electronic records entering archives is increasing. Whether the electronic records are in the form of e-mail, databases, text documents, spreadsheets, digital images, or web pages, archives look for metadata, or information about the records, to help them better understand the content and context of the materials they have received. Since electronic records are, in most cases, simply an alternate format of evidence traditionally created in paper form, they can be either a primary or secondary source depending on when, how, and why they were created.

Ephemera

Ephemera are materials created for a specific, temporary purpose. Although these items are often saved by individuals for sentimental reasons or by chance, they can contain valuable information concerning people, places, and dates associated with events and the culture and economy of the time.

Genealogical Notes

Some researchers have donated research notes to libraries, which are often cataloged with Manuscript Collections.

Immigration Records

Naturalization Records. Naturalization is the legal procedure by which an alien becomes a citizen of a state or country. Records of naturalization were not required to be reported to the U.S. Government until the Basic Naturalization Act of 1906, naturalization forms became standardized and were sent to the U.S. Bureau of Immigration (later the Immigration and Naturalization Service [INS]). Prior to that, federal, state and local courts could naturalize citizens. The records are kept by each court, or, in some cases, sent to be stored elsewhere. Immigrants often filed their first application for naturalization as soon as they came off the boat or other places on their journey to their final destination.

The formalized process required that a prospective citizen file a declaration of intention in which he or she renounced allegiance to foreign sovereignties. Following a waiting period of five years, an immigrant could then petition a federal court for formal citizenship.

There were three steps to the naturalization process:

Declarations of Intention (or First Papers). Normally the first papers were completed soon after arrival in the U.S., depending on the laws in effect at the time. Certain groups, such as women and children, were exempt in early years.

Prior to September 1906, Declaration of Intention forms usually requested relatively minimal information about the applicant, including name of the person requesting citizenship, year and country of birth, port of entry and month and year of entry into the United States, name of foreign sovereign, signature, and date of request.

After September 1906, Declaration of Intention forms requested increasingly more detailed information about the applicant, including name, age, occupation, personal description, place and date of birth, current address, country of emigration, name of

vessel, last foreign residence, name of foreign sovereign, port of entry and month and year of entry into the United States, signature, and date of request.

Beginning in the late 1920s, Declaration of Intention forms also requested information about other family members.

Petition (Second or Final Papers). Naturalization petitions were formal applications submitted to the court by individuals who had met the residency requirements and who had declared their intention to become citizens. As with the declarations of intention, their information content varied dramatically from one court to another.

Prior to September 1906, Declaration of Intention forms usually requested relatively minimal information about the applicant, including name of the person requesting citizenship, year and country of birth, port of entry and month and year of entry into the United States, name of foreign sovereign, signature, and date of request.

After September 1906, Declaration of Intention forms requested increasingly more detailed information about the applicant, including name, age, occupation, personal description, place and date of birth, current address, country of emigration, name of vessel, last foreign residence, name of foreign sovereign, port of entry and month and year of entry into the United States, signature, and date of request.

Beginning in the late 1920s, Declaration of Intention forms also requested information about other family members.

Certificates of Naturalization. Most certificates of naturalization contain only the name of the individual, the name of the court, and the date of issue. Certificates were issued to naturalized citizens upon completion of all citizenship requirements. Prior to September 1906, information on the Petition for Naturalization was often limited to the petitioner's name, address, occupation, date and country of birth, and port and date of arrival in the United States.

After September 1906, subsequent versions of the Petition for Naturalization required increasingly more detailed information, including petitioner's name, residence, occupation, date and place of birth, race, date and place of Declaration of Intention, marital status, name of spouse, date and place of marriage, date and place of spouse's birth, date and place where spouse entered the United States, if applicable, residence of spouse, names, dates of birth, and place of residence of children, last foreign residence, port of emigration, port of entry and date of arrival, petitioner's name at time of arrival, name of vessel or other conveyance, name of foreign sovereign, length of time, dates and places of residency in the United States, signature, and date of document.

Part of the Petition for Naturalization also includes a place for signed and dated affidavits of two witnesses, Certificate of Arrival file number, and Declaration of Intention file number. After 1930, the Petition for Naturalization often includes a photograph of the petitioner.

Certificate of Citizenship. This document granted the individual United States citizenship. The Certificate of Naturalization includes name, address, birthplace or nationality, country from which they emigrated, birth date or age, personal description,

marital status, names of spouse, age or birth date of spouse, address of spouse, names, ages, and addresses of children, and date of document.

Oath of Allegiance. This document was used to renounce allegiance to a foreign country and declared his or her allegiance to the United States. The Oath of Allegiance includes the petitioner's signature, and date of document.

Value:

- Naturalization records may provide important information in helping an individual locate the country of origin of an ancestor.

Additional Internet Resources:

Finding U.S. Naturalization Records

<http://www.rootsweb.com/~fianna/oc/usa/naturloc.html>

Finding U.S. Naturalization Records

<http://home.att.net/~wee-monster/naturalizationrecords.html>

Land Records

There are many types of land records-title abstracts, land purchases, grant, and more. Land records are typically one of the records kept from the very early days of settlement in an area and may be available when other records are not. These records provide information on relationships between individuals, approximate relocation dates, and the financial state of a family.

US General Land Office Tract Books

Tax Records. Tax records include assessment lists, which give the names of property owners and the value of each property; and tax lists, which record the taxes actually due and/or paid. In some states property such as livestock and furniture and even head or poll taxes on individuals were levied. Although tax records rarely contain information on families, they can be useful in establishing when a family arrived in or departed from an area. Generally all adult males in a household were named on head tax lists.

Deeds. Deed books record the ownership and transfer of property, usually real estate.

Bounty-land Records. The federal government offered land to those who would serve in the military during the Revolutionary War. Some states also offered their land as an enticement for military service. The federal government reserved tracts in the public lands, and most of the original thirteen states set aside tracts of bounty land in their western holdings. Delaware, New Jersey, New Hampshire, Rhode Island, and Vermont did not have bounty lands; they simply did not have enough unclaimed land to support warrants. Georgia, Maryland, New York, Pennsylvania, and South Carolina either had no land in western territories or gave up their claims to the government. Any reserves for bounty lands lay inside their own borders.

Lands in the area that would later be Tennessee, Indiana, Kentucky, Ohio, and Maine were controlled by eastern states. North Carolina did not issue bounty lands within its borders, but instead issued warrants to its western lands which later became Tennessee. Virginia also selected reserves outside its current borders, choosing bounty lands in an area that would become Indiana, Kentucky, and Ohio before ceding its claims to the

federal government. Massachusetts allotted its bounty lands in an area that was to become Maine.

A veteran requested bounty land by filing out an application, usually at the local courthouse. The application papers and supporting documents were placed in bounty land files, kept by the federal or state agency. These files contain information similar to pension files - such as veteran's age and place of residence at the time of the application. When the application was approved, the individual was given a warrant. Delays in implementing the warrant policies caused some states to issue scrips which could be exchanged for a warrant at a later time. Only a few soldiers actually received title to bounty land or settled on it. Holders of land warrants were allowed to sell or exchange the warrants, which most did. Land speculators bought up thousands of acres worth of land warrants.

Federal bounty land applications and warrants for the Revolutionary War have been microfilmed. They are available at the National Archives, its regional branches, and the Family History Library.

Donation Land Records. In 1850, in an attempt to lure settlers to the new western lands, the government gave lands to would-be settlers in Florida, New Mexico, and Oregon and Washington Territories, known as Donation Lands. Settlers were required to reside on and improve the land by cultivation for four years before receiving a patent. Unique to the donation lands was the limits placed on the time of arrival rather than time of application. Young children who came with their families between 1850 and 1855 could claim their land when they became adults. Microfilm copies of Oregon and Washington Donation Lands are available at the National Archives, the Seattle branch of the National Archives, the Family History Library, and the Oregon State Archive.

Homestead Records. The first Homestead law was enacted in 1862 and was also intended to encourage settlement in the West. As with the Donation Lands, the only requirement was to live on and improve the land through cultivation. Only a small filing fee was required. Although only an estimated 780,000 people received patents under the Homestead Law, 2 million applications were made, dispersing approximately 285 million acres.

Applicants initially had to be a head of household, over 21 if single, a citizen or have applied for naturalization, and had not "borne arms against the government." Single women and widows could apply in their own right. The final application for the certificate of patent could be made five years after the completion of the residency requirements. If a homesteader died, his widow or heirs could continue to qualify for the claim, meeting the same requirements. Subsequent laws enlarged and expanded the homesteading provisions such as the one allowing Union veterans to apply their service time, up to 4 years, to the residency requirements. After 6 months, a homesteader could "prove up" and change his homestead to a cash-entry and pay for the land at \$1.25 an acre. Once the final certificate was received, it entitled the claimant to a patent for his homestead.

Homestead application records are only available at the National Archives. They have not been microfilmed.

Bureau of Land Management. The Bureau of Land Management-Eastern States Office supervises the public land states east of the Mississippi River and the states that border the western side of the river. While most of the other states have their own state agency, some of the states share a common office. Montana, North Dakota, and South Dakota are administered from the BLM office in Montana. New Mexico, Kansas, and Oklahoma are administered from New Mexico; Oregon and Washington from the Oregon BLM office. Wyoming and Nebraska are governed from Wyoming. Records kept by the Bureau of Land Management for pre-1908 claims include field notes, survey plats, tract books, and patents.

Patents to federal lands for the entire United States are still maintained by the Bureau of Land Management. You can search for pertinent land records on the BLM's Official Land Patent Records website. Information from this site will allow you to request the land entry case files from the National Archives.

Describe the acquisition of land from the federal government, the date, the legal description, the type of acquisition, and the final certificate number.

BLM Website: <http://www.glorerecords.blm.gov/>

Value:

- Can connect relationships (more often implied than directly stated)
- Reveal approximate moving dates
- Reveal financial status of a family
- Help distinguish between individuals with the same name
- Can show military service
- Does not usually provide dates of birth, death, and marriage
- Finding a homestead can lead to a cemetery
- Finding the actual/approximate area your ancestors lived

Local and Family Histories

The historical society is usually a great source for finding local and family histories which are invaluable as you discover the roots of your ancestors.

Family History. A family history is a book or document that gives facts and information about one or more generations of a family. Published family histories are sometimes referred to as genealogies. They represent a compilation of a family historian's research, in which all the family information gathered is compiled into a publishable volume. For many family historians and genealogists, publishing a complete history of their family is their ultimate goal. And many of these family historians then sell their work to the general public, to other family members, or perhaps donate it to a local library. A good family history—one that is well-researched, well-documented, and contains information relevant to a number of families—can achieve widespread distribution.

Local History. The overwhelming majority of local histories address how a particular region and its citizens handled and reacted to every major state and national happening. In these compilations one can find how a community handled everything from wars, waves of immigrants, and depressions, to changing political scenery, taxation, trade, and commerce. And each of these events affects what people do, where they live, what

organizations they belong to, how they earn income, and how they dispose of that income. Knowing what neighborhoods developed during a particular time period, realizing when certain organizations came into and went out of business, being aware of various laws and codes, as well as local customs and ceremonies-all this provides the researcher with the ability to uncover more information.

Biography. A biographical sketch can include almost any aspect of a person's life, but generally contains information about the individual's family, education, and occupation. Thus, biographical sketches usually tell the subject's date of birth, parent's names, wife's and children's names, and often their birth dates. Usually there is some information about where they were born. Even if we are not fortunate enough to find a biographical sketch of the subject of our interest, there are other things to consider. Even if your ancestor wasn't prominent enough to get a mention, there may be other clues to his personality in these books. Also, you may want to consider whether the subject of a biographical sketch was related to the family in some way. Frequently, groups emigrated from the "old country" together, and by learning more about one member of a pioneer group, we can also find valuable clues to others.

Institutional Histories. Look for histories of the institutions that may have relevance to your family: churches, orphanages, charitable institutions, schools, hospitals and dispensaries, cultural institutions, cemeteries, businesses.

Important: Look in the Notes

As a genealogist, the family and personal histories will provide clear documentation for statements made; footnotes and bibliographies can truly provide key data if one engages in a process known as citation analysis. This process involves taking a critical look at all notes and bibliographic references with an eye toward analyzing them for evidence of heretofore unknown record groups, publications, court records, and other papers which might document the life of an ancestor.

Additional Internet Resources:

Locating Published Genealogies

http://familytreemaker.genealogy.com/15_genes.html

Maps & Gazetteers

Gazetteers are a geographic dictionary index; a combination atlas/almanac. It typically contains information concerning the geographic makeup of a country or region, and the social statistics, e.g. population, GDP, literacy rate, etc. You will find a list of businessmen (typically not farmers), by towns and counties only. These were published irregularly. Many of these are on microfilm.

Memorabilia

Memorabilia are objects containing historical value that do not fit into any of the standard categories of special collections. These items often commemorate events or the achievements of an individual or group. Memorabilia collections frequently include badges, plaques, paintings, trophies, and coins but may also include items such as pens, name tags, office equipment, clothing, and even hair. In many cases, memorabilia are materials that would likely be found on display in a museum and thus are often used by archivists and curators for exhibits.

Military Records

Military records kept by the U.S. Government about soldiers and sailors who served their country are a major source of information about individuals. The four major wars of interest to genealogists are:

- American Revolution (1775-1783). Approximately one out of every seven Americans fought in the American Revolution.
- Civil War (1861-1865). Approximately one out of every ten Americans fought in the Civil War.
- World War I (1918-1919). Over 4.8 million served in World War I
- World War II (1942-1945). Over 16 million in World War II.

Because of these statistics, it is worthwhile to investigate the possibility that adult males (13 and up) who were alive during these wars may have fought in them. Many smaller wars have occurred in U.S. history, and there are records of genealogical value for those conflicts and are also found at the state level. These include:

- War of 1812
- Mexican War
- Spanish American War
- Plains

Military Records provide basic information about a soldier, including the unit in which he or she served, dates of military service, and sometimes a date of death. By entering information from any of the following records on a printed form provided by the National Archives, copies of federal military service and pension files can be requested from the National Archives.

Death Lists and Casualty Indexes. These records contain information on soldiers who were killed in action, or died from wounds received in military service.

Draft Records. These records contain information on individuals who registered for military drafts.

Pension Records. These records contain information about officers, disabled veterans, needy veterans, widows/orphans of veterans, and veterans that received a pension from the American government.

Registration Cards. These cards contain information about the men who were required to register for a military draft.

Rosters. Rosters list the names of people who were assigned to specific military units.

Service Records. These records comprise the information that the government keeps on any soldier (for example, enlistment/appointment, duty stations and assignments, training, qualifications, performance, awards and medals, disciplinary actions, insurance, emergency data, administrative remarks, separation, discharge, retirement, and other personnel actions).

Additional Internet Resources:

Military Resources

<http://www.archives.gov/research/alic/reference/military/index.html>

The Grand Army of the Republic and Kindred Societies

<http://www.loc.gov/rr/main/gar/>

U.S. - Military

<http://www.cyndislist.com/military.htm>

Military Records Links

<http://geneasearch.com/military2.htm>

Ancestry.com

<http://www.ancestry.com/learn/contentcenters/contentCenter.aspx?page=military>

Newspapers and Periodicals

Newspapers

Newspapers can contain a multitude of genealogical information- obituaries; notices of births, marriages, and deaths; legal notices; estate transactions; biographies, military, immigration.

Value:

- Provide obituaries, birth and marriage announcements, and other events in a family's life.
- Provide obituary when official death records do not exist.
- Provide backup to public records when they have been destroyed by fire.
- Yield many clues such as names of family, occupation, unique news, organizations, legal announcements, and images, etc.

Periodicals

Through periodicals, the researcher can begin to gain access to data contained in vital records, court records, plat maps, family Bibles and day books, declarations of intention and naturalization certificates, local census and tax lists, church records and cemetery inscriptions, as well as the dozens of few-of-a-kind local items.

Genealogical Society Publications

City, county, regional and state genealogy societies write and publish journals, newsletters, and quarterlies that focus on the area interest to the genealogical organization. They are published monthly, quarterly and annually. These range from a few pages to hundreds of pages. These publications tend to index, abstract, and transcribe the records of the region where they are published.

Value:

- Reveal genealogical sources and resources in specific geographic areas.
- Index and abstracting source materials.
- Provide ancestor charts and group sheets of members.
- Lists of upcoming seminars significant to family historians.
- Acquisition lists and holding statements of area libraries and archives.
- Provide names of officers and directors of the organizations who can be used as research contacts.
- Provide unique and forgotten sources of information.

- Provide important research tips for the area.
- They contain such items as genealogies, transcripts and abstracts of local records, probate records, church records, and cemetery records.

Additional Internet Resources:

List of Genealogical Society Publications:

http://www.loc.gov/rr/genealogy/bib_guid/genperiosubj.html

Historical Society Publications

Society publications can be a significant aspect of immigrant research. Any local record may be the subject of publication by a local society. Whenever you contact a genealogical or ethnic society, be certain to inquire about their publications. Even when such publications do not identify an immigrant's home town, they may provide further identification about your immigrant, or may instruct you on additional sources specific to a locality or ethnic group.

City, county, and regional historical society publications. Document the local geographic area, the activities of organizations and institutions, the lives of the leaders of the community, the impact of major events such as war and depression, and the impact of major trends such as migration and settlement patterns. You will also find index's and abstracts of records found in the area.

State historical society publications. Contain articles that chronicle the lives of the rich and famous, unusual scientific or religious movement, or detailing a Civil War regiment.

Ethnic society publications. Provides an excellent resource of articles that are focused on the ethnic culture (e.g., Historical Society of Germans from Russia). They help trace, discuss ancestry, share sources of data and common findings across the group.

Society Conference Syllabi. Historical societies hold annual conferences that usually publish a syllabus. These provide insights, tips and research strategies specific to the area of interest.

Special interest publications. These publications focus on groups that have a common experience or shared interest among the group of patriotic, military and heraldic society publications (e.g., B-26 Marauder Historical Society, United Daughters of the Confederacy, Daughters of the American Revolution, Daughters of the Utah Pioneers.) They provide data on individuals that participated in the common/shared experience, a rich profile of records available from local to national levels, genealogies, profiles of units and groups, and insights into daily life.

Family publications. Family publications also known as surname publications, focus specifically on a family and are full of family group sheets, individual histories, details of family reunions, photographs, documented genealogies, and lists of publications that contain family information.

Value:

- Help to set research in the proper historical context.
- Useful for citation analysis (e.g., to construct the widest possible data pool in which to look for ancestors.)
- Provides in-depth information of individuals, communities, and etc. to which our ancestor belonged.
- They contain such items as genealogies, transcripts and abstracts of local records, probate records, church records, and cemetery records.
- Provide unique and forgotten sources of information.
- Provide important research tips for the area.
- Index and abstracting source materials.
- Checking every index to help focus on the articles that will have the greatest value.

How to Locate Newspapers and Periodicals

There are thousands of local, county, regional, state, and national periodicals currently being published or having been published. The task of finding specific geographic and surname data may, at first, appear daunting. The following are several good and reliable sources.

Worldcat

<http://www.worldcat.org/>

WorldCat, is a catalog of the holdings of thousands of libraries worldwide. Many of these libraries have cataloged their periodical holdings and WorldCat can be searched by family name or geographic location.

- Search many libraries at once for an item and then locate it in a library nearby
- Find books, music, and videos to check out
- Find research articles and digital items (like audio books) that can be directly viewed or downloaded
- Link to "Ask a Librarian" and other services at your library
- Post your review of an item, or contribute factual information about it

PERSI

<http://www.ancestry.com/search/db.aspx?dbid=3165>

<http://www.acpl.lib.in.us/genealogy/persi.html>

The Periodical Source Index, or PERSI, is the largest subject index to genealogical and historical periodical articles in the world. Created by the foundation and department staff of the Genealogy Center of the library in Fort Wayne, Indiana, PERSI is widely recognized as being a vital source for genealogical researchers.

With more than 1.1 million entries, genealogists can search for articles about the United States, Canada, and overseas locations, about surnames, and about research methodology topics. The index is widely available in print, on CD-ROM, and online at ancestry.com. You can also find PERSI on microfiche at Family History Centers throughout North America. It is important to remember that PERSI is not an every-name index, but rather a subject index to assist in locating important source materials. The index grows by at least

one hundred thousand new subject entries each year, and is a necessary source for genealogists.

Although PERSI does not index every name in periodical articles, it is the most comprehensive of the indexes to American genealogical periodicals. Beginning and experienced researchers should make full use of this reference tool. Researchers should use PERSI to locate references to personal names and locality records.

If articles of interest are located, the researcher may request a photocopy of them through Inter-library loan, or obtain a copy for a fee by contacting the Allen County Public Library Foundation (P.O. Box 2270, Fort Wayne, IN 46801-2270) or another library that holds the periodicals of interest. A form is available for requesting copies of articles from:

Order form: http://www.acpl.lib.in.us/database/graphics/order_form.html

Regional Indexes

Check to see if the state or region you are focusing on publishes indexes such as:

Virginia Historical Index

<http://www.lva.lib.va.us/whatwehave/news/swem.htm>

WAULS--Worcester Area Union List Of Serials

<http://wauls.wpi.edu/>

Oral Histories

Oral histories are recordings of people's memories. It is the living history of everyone's unique life experiences. They record people's experiences on sound and video tape. Oral histories enable people who have been hidden from history to be heard, and for those interested in their past to record personal experiences and those of their families and communities. It is a vital tool for our understanding of the recent past. Many societies and libraries have begun such projects in recent years.

Photo Collections

Photograph archives consist of collections which can range from a few to several million images. Depending on the collection, images will date back to the 1860's and track the expansion of the community, county, region, and state. You will see contributions of various ethnic groups, people and organizations to the geographical formations of the region. Decade after decade commercial, journalistic or family photographers have focused on familiar neighborhoods, geography, and buildings.

Photograph collections are important from a regional, national and international significance. From a national perspective it's a collection of what became of an area as it was settled. Issues relating to water in arid climates, Native Americans, air and automobile transportation, suburbanization, agriculture, and recreation are addressed and presented through the work of many late nineteenth and twentieth century photographers.

Photographs help families secure images related directly to their family. Collections are used by researchers in need of illustrations, but the photographs have also lined the walls of restaurants,

businesses, and public institutions. Researchers put images in books, films, television news, and computer home pages. Property owners have used the collection to document the design changes in buildings or houses in the city.

Most collections are well preserved. Copy negatives or duplicate negatives have been made of large groups of photographs that were once in danger of disappearing because of deterioration. Many historical societies have placed collections on-line or on microfiche.

Probate Records

Probate Records are generated by county courts. Societies and libraries will have probate records for some counties; others can be obtained by contacting the county clerk in the county where the will was probated.

Rare Books

Although a common misconception holds that rare books are always old and that scarce books are always rare, there are in fact many factors that contribute to a book's rarity. In the broadest sense, a book is rare if its demand exceeds its supply. Demand for certain books is based on a number of intrinsic and extrinsic characteristics, such as the book's age, scarcity, association, condition, physical features, and popularity of author or subject.

Reference Guides/Brochures/Leaflets

Many state organizations provide reference guides, brochures or leaflets in print and on-line that discuss specific aspects of their collections and how to use or how to conduct research in a particular state, region, or locale. Look for guides such as:

- A Guide to Genealogical Research at the (State) Historical Society
- Population Census Records at the (State) Historical Society
- Index to Naturalizations in (State)
- List of Basic Sources on (State) History

Scrapbooks

The scrapbook is one of the few types of archival materials created for the purpose of preserving the memory of an individual, organization, or event. Often comprised of photographs, newspaper clippings, and annotations, scrapbooks can offer valuable information about the past but are also susceptible to a loss of material caused by inadequate adhesive or items sticking together.

Subject Based Collections

Although archival materials often make up a large part of an institution's special collections, many published special collection materials are maintained together not only because of their rarity but also based on their subject matter, author, or some other unifying theme. Most subject-based collections consist of secondary materials that, brought together in one place, constitute a valuable and unique research collection. Subject-based collections attempt to collect exhaustively in their subject area and will often include primary source material in the form of official documents and archival and manuscript materials that has been published for wider dissemination.

Organizing Your Research Priorities

50/50 Rule

The best counsel anyone gave me about planning a genealogy research was:

“Plan 50% of your research before you go.

“Plan the other 50% when you get there.”

It's important to know where you will be each day of your trip, but don't plan it so tightly that you can't take advantage of opportunities as they present themselves.

1. What research can you do from home?

Before you travel hundreds if not thousands of miles to find the library or archive in the home of your ancestors, make sure the records you seek aren't as close as your computer or down the street at your local library. I've heard researchers discuss their disappointment of traveling to a distant land only to find out that the records they sought could be viewed by the internet, ordered on microfilm from the local LDS Family History Center, or acquired by interlibrary loan. Send mail requests to churches, historical societies, city halls, and so forth.

Searching for family records in your ancestor's origins should only be undertaken after you are sure you cannot acquire the records through readily accessible means. You won't want to spend hours and hours in an old church or archive and find out later that the records you needed were just minutes away. Try to identify which records, books, and histories have not been microfilmed or are not open for interlibrary loan.

Ok, you have done your homework and confirmed that you want or need to conduct research in the lands of your ancestors.

2. Review your records before you go on your trip.

It's important to go over your records very carefully. Review every printout, photocopy, note and Internet record. Know what you have and what you don't have and make a to-do list of what to find. The basic genealogical advice to work from what you know to what you don't know applies. Please do not take your entire notebook, rather, take key notes that will aide in your search during the trip. If you are bringing your laptop, you may already have all the details electronically.

Remember there are records available in the U.S. (such as parish records at the Family History Center in Salt Lake City). Concentrate on what's not available here.

3. What kind of records can't be found at home?

It's been mentioned several times to focus on those records you can't find in your homeland. The following is a good example of what to look for. A fellow genealogist had been hunting for a particular ancestor for 28 years. All he knew about the person is that he might have worked aboard ships as a young man. Prior to his trip, he became aware of a Mariner Library in that ancestor's country. While at the library he found a letter written in the hand of the ancestor in what was known as the Marine Board correspondence. He also found meal lists from the 1850's and a myriad of other documents that related to his family. This is the type of information you won't find in microfilm or on-line. It takes visiting the ancestral lands to accomplish such research.

4. Questions to ask that can yield treasures

Remember you're conducting this research because you're not able to acquire these records from home. Make sure you ask your libraries, archivists, and clerks questions such as:

- a. What indexes or collections are unique to your facility?
 - b. Do you have card files, newspapers, original records, computer databases, networks, or compact discs that can only be searched at your repository?
 - c. Have your records been microfilmed, if yes, where else are they located?
 - d. Are any of your collections accessible on-line?
 - e. Does it have records such as church records that have not been microfilmed?
 - f. Do you have records from (you name the time period)? If not where can I find them?
- Note that many countries are consolidating rare records to a common depository.

5. Determine what resources are available in that area.

Before you start your trip, do research to determine the places that have information or materials you can use. Resources can include libraries, archives, genealogical societies, historical societies, courthouses, vital record offices, churches, funeral homes, chambers of commerce, cemeteries, schools, and fraternal organizations.

And don't just concentrate on libraries, courthouses, and cemeteries. Frequently, genealogists ignore regional archives or regional libraries that may contain useful records.

6. Determine what type of information you seek.

Know what you are looking for, what you need and do your homework before leaving so you know where you want to go and what to look at when you get there.

I like to begin by writing down questions to the answers I am looking for. This gives me a start to my research plan. For example:

- a. Who are the great grandparents?
- b. What was the name of my Dad's brother who died as an infant?
- c. Where is the house my Mom grew up in?

One researcher knew he was going to South Carolina for a business trip; he checked his records and decided he could use a portion of the trip to look for information about his maternal great-grandmother and her parents and siblings. They supposedly came from the Charlottesville, Virginia, area. Prior to his trip, he

- a. Researched and located the available resources in the city and county.
- b. Made notes about the family.
- c. Printed off all the information he had about the family from his genealogy database program.
- d. Asked himself questions about what he wanted to find out about his family.
- e. Made a list of
 - i. The types of information he wanted locate.
 - ii. The possible types of records that might satisfy the needs.
 - iii. And where he might find the records.
- f. He listed by location the people and record types he wanted to find. For example, if he was going to the courthouse, he would have a list of each individual and each of the types of records he would hope to find there for each person (e.g., birth, marriage, death records, property tax records, wills etc.).
- g. He contacted each resource and discussed his needs and confirmed the
 - i. Types of records that were available.

- ii. Hours of operation.
- iii. Key persons to contact on the given day he was in town.
- iv. Any special requirements for viewing/acquiring records.
- v. Availability of copy machines and associated costs.
- vi. Fees to enter the facility if any.
- vii. Types of personal documents to prove lineage (if needed).
- viii. Availability of persons to help.
- ix. Guidelines for using cameras.
- x. Types of facilities to do research in.
- xi. Opportunity to do the research on-line vs. in person.
- xii. Need to make a special appointment to meet with key persons.

When he contacted the local Methodist church he wanted to know if they had membership records from the 1880s and whether one can study them.

When he contacted the local genealogical society he inquired about the records they had and who in the organization might know the most about his family's history, how to reach the person, and when he might be able to meet with him or her.

- h. Where appropriate he sent key contacts a detailed summary of information he had and clearly outlined the information he was seeking. This gave persons a few days or weeks to begin preparing for his arrival.

Conducting prior research will help you become more focused on goals and help you better utilize your limited time. If you aren't well prepared you could end up chasing about unnecessarily looking for things in the wrong place. One researcher during a trip to Scotland went looking for birth, marriage and death certificates in Dundee and found out the records he was seeking were in Edinburgh a 2 hour drive away.

7. Make advance contact—establish a rapport.

Once you have identified the available resources, make the effort to contact each source directly by mail, telephone, and/or email. You will save yourself many, many hours by making advance contacts.

When you make these personal contacts in advance, introduce yourself and explain that you are conducting genealogy research. Let them know what you are seeking, and try to establish a rapport. You are making new friends, and they can open doors for you while you are on-site and smooth your way.

Once a person I'd contacted in advance helped me find the curator to a local museum that was only open a few hours a week from whom I made special arrangements to have a private opening. This was done on a moment's notice, a task that would have taken me hours in an unfamiliar town.

8. Whenever possible, let people know you are coming and when

Of all the hints I can provide about traveling and doing on-site research, this may be the most important. Let people know you're coming and when. Make sure the people you need to see will be there. Based on my needs, I have been willing to rearrange my schedule to be at a library when the prime resource would be there. Don't leave this to chance. Remember you have come

a long way. Don't arrive at the church only to find that Wednesday was the day off of the archivist or that there was a local holiday for which all public facilities were closed.

And don't forget to confirm your appointment or just give a courtesy call to let them know you are excited to come. I have had the local contact with whom I was going to meet have many of the records, books, etc. pulled already for me to review. At the request of my key contact, unbeknownst to me, I have had persons travel many miles to visit with me because they were the expert on my family line.

And if your schedule changes and you can't make the agreed upon time, be courteous, call and let them know so they can reschedule with you.

Make sure they have your contact information, email, cell phone, etc. so they can get hold of you should their circumstances change or they need to clarify your research needs.

9. Know the times of operation.

Remember to contact county courthouses, libraries, and other record repositories you plan to visit to determine their office hours. There's nothing more frustrating than getting to a destination and finding it closed for whatever reason.

10. Be patient when requesting records.

If you are planning to receive specific records before you leave for your trip, give yourself at least a 4 month window. Why? Many libraries and archives have more requests than staff to manage. Sometimes it will take several weeks for the staff to even begin research, let alone send you requested information.

11. Planning to visit the library/archive

Check to see if the library has an internet site. Most library internet sites provide the basic information associated with hours of operation.

Larger libraries, like the Library of Virginia, and state/country archives have an online catalog. Search the catalog before you go. I have usually been able to locate specific books, microfilm, papers, photographs, etc. that will be available for my specific research. Make sure you print out the details from your catalog search.

Check out the Library of Congress Card Catalog to determine what books have been published on the county or area you're planning to visit, so that you can look them up in the local library you'll be visiting.

Write/email the libraries that don't have online information to find out about their genealogical collection, location such as floor/level, building, and hours of operation. Some collections in libraries can only be seen at specific times and/or may have special restrictions.

I have also found it helpful to call the library to talk with a librarian to see if there are staff researchers that can help if I have questions. Learn about the expertise of the staff. In some cases I have planned to visit a library when the librarian with the expertise I needed was going to be working.

There may be local researchers who are available as volunteers and for hire who know the library and are willing to work with you to quickly get information you seek.

Make sure you make time to concentrate on using indexes, manuscript collections, unpublished records, rare books, photographs, and sources unique to the library or archives where you are researching before you get to the more distributed information that other facilities will have.

If the library doesn't seem to have what you are looking for, make sure you ask the library for recommendations of where to go.

Also be aware of local traditions. One researcher tells of an experience when they visited archives located in Glasgow, Scotland. Upon arriving at the archives at the prearranged time, the primary researcher, left for her daily 2 hour tea/lunch break. The supporting staff was unable to assist the researcher. Upon the archivist return, she was able to locate in a matter of minutes records of local cemeteries that he had been told by the staff did not exist.

12. Where is the best place to get information?

As you start uncovering where to find the records, you may come across the knowledge that the same records are available in different locations. Make sure you ask the cost of acquiring such records. In a recent trip, I found that a marriage record from the early 1800's would have cost me \$10.00 at a university library. The same information was available at the state archive for the cost of a photocopy.

13. Family History Library, Salt Lake City, Utah

Anyone who has done research in Salt Lake City at the Family History Library will find foreign record offices quite a bit different. You won't be looking at original documents, but you can go and take as many films as you want out of the cases, copy anything you like yourself and return the films. You can cover a lot of territory in a short span of days, especially since it is open from 8:00 a.m. to 5 p.m. Mondays and 8:00 a.m. to 9:00 p.m. Tuesday – Saturday and closed some holidays. Groups of people come to Salt Lake from around the world to do research because so many records have been gathered in one place. It is so much more efficient than running around to different archives in their native countries. If you decide that you desire to go to Salt Lake City, make sure you check out the online catalog to help you find exactly what you are looking for before you come. The following is the contact information for the library:

Family History Library

35 North West Temple Street

Salt Lake City, Utah, 84150-3400

Public phone number: 801-240-2584 or 866-406-1830

FAX: 801-240-3718

E-mail: fhf@ldsfs.net

Website: www.familysearch.org

Conducting Research

1. Keep a travel journal during your trip

Each day of your trip is full of research, excursions, meeting new people, taking pictures, reflecting upon your family and the unexpected. Take time at the end or beginning of each day to write in your travel journal. Upon your return home, you will find that your journal will be one of the most important assets you have in furthering research and documenting the value of your trip. After just one week on the road, one day blends into the next.

I tend to write events in my travel journal in a chronological format (what happened first, second, third). For example, after I entered a library I will write details about:

- Who I spoke with and their role in the library, address, email, phone number, etc.
- All discussions no matter with whom and information exchanged.
- The records I looked at and why.
- What I found and decisions I made during my search.
- All new information carefully documenting all associated information.
- Thoughts and questions that cross my mind during the research.

I will make comment about the places I visited and why they were of interest to me. I discuss what I learned, pick-up brochures, and any other information that will help me tell the story.

I find myself reviewing what I wrote several times during the trip as I ponder options and make decisions about what direction to take the research and planning my free time. The parts of my journal that are most interesting are how often I just happen to meet the right person who is able to open doors to help find the place I am searching. The person who knows about my family name and history and will take me to the gravesite of an ancestor. The person who knows the person who now lives in the ancestor's home, or is the person who knows where to find the record I seek.

2. Learn about local history

One of the most enjoyable aspects of taking a genealogy trip is learning about the history of the local area. Don't become so focused on trying to find that long-lost record that you forget that your ancestors were people with dreams, opportunities, successes, frustrations disappointments, bills, sickness and death. They may have moved more than once or cleared the land to make a new home.

Learn about the history of the area where your ancestors are from. What did they eat, where would they have gone to church, where is the mill they took their crops to. What sort of natural features did they encounter when farming the land? What is the city most famous for? The more you know, the more you can appreciate just what your ancestors' lives were like when you are there. If you learn lamb and potatoes were the primary staple or that blueberries were grown in the area since the 1600's, perhaps you will take the time to order the "local" dishes when you are in town. Who knows, you might even ask for the recipe.

3. Searching for Your Ancestors Original Places of Residence

Like many of our ancestors, they came from tiny villages that few people have ever heard of. When they immigrated they may have simply said they were from the largest nearby town or city. If you are looking for the experience to stand exactly where Great, Great, Great Grandpa lived or have your picture taken in front of his home, make sure you know exactly what town they came from.

Records such as birth records and land records can help locate where your family lived by giving you a street address or the land where they lived. With such information in hand, I have been able to ask directions from locals and gain very good directions to find what I was looking for. Don't be surprised if the information on the records gives you a different village.

You might have the right village and go to the church. However, the church may no longer have the records. It is quite possible they have been moved to the Genealogical Society in London. In most countries, older records are being consolidated in central repositories. Always ascertain in advance where the actual records are kept.

4. Searching libraries and archives in the country

As I have conducted research in countries, expect to find the unexpected. Some of my experiences were as follows:

- a. Record offices will have government hours (perhaps closing for lunch).
- b. You may need advance reservations.
- c. You may need to look up your resources in a catalog and write them on a request for which you submit to the reference librarian.
- d. Your request may take more than a half-hour to arrive.
- e. You may only be allowed to view one request at a time.
- f. You may be allowed to take photographs of the documents.
- g. If you are not allowed to take photographs, then you may need to fill out a request form and submit it. It may take from just a few minutes to a few hours before your request is ready.
- h. Sometimes you are limited to the number of copies you can make in a day.
- i. Remember the person behind the desk is in charge.
- j. The staff may bring the requested artifacts to you and pick them up from you while you are seated.
- k. You may be required to stow your backpack in a locker.
- l. Security may ask to see the contents of your pockets/purse.
- m. Some record facilities are very strict about each researcher having a table or seat.
- n. Advance reservations may be required.
- o. Research under these conditions gives you the thrill of handling papers that may be 200-plus years old.

5. Searching graveyards during your trip

Searching graveyards can be a mixed experience of disappointment and jubilation all in the same day.

First, see if you can find a map of graveyards you intend to visit and the background about each. Check with the local historical societies and ask if there is a record of the local cemetery. If there is no documentation available, try to locate the Sexton (caretaker of the graveyard) to see if there is a plot organizational chart that defines who is buried where.

Check to see if there is an old map and new map of the graveyard. Compare them to see what differences there are between them. In some countries there is what is known as an ordinance survey (OS) reference number which identifies the cemetery. Other countries have other reference systems. The key here is to realize there may be more to graveyards and cemeteries to help find what you seek.

I enter a graveyard with reverence and anticipation. I am hoping the headstone is legible and easy to read. If the headstone is over 100 years old, I am pleasantly surprised and grateful if the headstone is legible, and not damaged by vandalism or weathered by the years. Whatever I find, it is always fun.

Take a small pocket notebook with you at all times. You'll need it to draw diagrams of graveyards and write down inscriptions.

If you have some flexibility in your trip as to the days you will be searching the graveyard, keep a close watch on the weather report. It is always better to view a graveyard on a sunny day versus an overcast, rainy day.

Are you planning on taking photographs of headstones or making headstone rubbings on your trip? If you are, and you've never taken a photograph of a tombstone or made a headstone rubbing, practice on some local stones before you leave. The time to learn isn't at a cemetery 2,000 miles from home on the last day of your trip.

6. Photographing at the cemetery/graveyard

Over the centuries, several different types of stones have been used to create gravestones. Some of the stones are quite porous and fragile, while others are resistant to damage. Be careful when attempting to improve the readability of the inscription. Types of stone:

- Prior to the nineteenth century: sandstone or slate.
- Nineteenth century: marble and gray granite.
- Late nineteenth century to the present: polished granite or marble.

1. Take photos of the cemetery entrance, sign, book of records, and church.
 - a. Before you start taking photos of headstones, make sure you capture the details of the cemetery that include the name, street signs, proximity, and church adjacent to the cemetery.
 - b. All these details will help you and others that follow know where you have been.
2. North, south, east, west: Best time of day for photographing headstones.
 - a. Sunlight emphasizes imperfections in the stone and can make the carving look flat.
 - b. Headstones facing west are best photographed at midday.
 - c. Headstones facing north should be photographed in the late afternoon.
 - d. Headstones facing south are well-lit all day.
3. Large headstones require close-ups of inscriptions.
 - a. Taking photos of large headstones alone sometimes makes the inscription too small to read.
 - b. Take a photo of the large headstone and then move in close to take a photo of the inscription.
4. Family grave plots require group and individual photos of each headstone.
 - a. A family plot constitutes of two or more graves.
 - b. Take a group photograph of the graves that shows the number and proximity.
 - c. Take each headstone separately.
 - d. If you are photographing a cemetery, photograph all family plots the same, for example: group plot, headstones left to right, top to bottom.
5. Consider taking photos of all headstones in a small community cemetery.
 - a. If your family came from a small town and your roots go back many generations or many decades, chances are you are related to most, if not all persons buried in the cemetery.

- b. If you have traveled a great distance to capture family graves on film, take an extra hour or two and capture the other headstones on film, you can sort out details later.
 - c. You will often find direct family members buried amongst other families.
6. Look at the base, top, sides, and back of headstones.
 - a. In addition to the inscription, look around the headstone for other important information that can be inscribed about the individual, family, maker of the headstone, and writings of the deceased.
7. Take eye-level photos of headstone inscriptions.
 - a. When taking photos of headstone inscriptions, try to take the photo of the inscription at eye-level. You will find information much easier to read in the photo.
8. Talk to the sexton.
 - a. Can't find family, see if you can talk to the sexton and ask to see the cemetery plot map.
 - b. Sexton may have records you can simply photograph.
 - c. Some cemeteries bury several layers deep to conserve space. In these situations, the headstone on top may only be for one of the several persons buried in the plot.
 - d. Sometimes headstones are not available because the family is too poor for a headstone, but the sexton will have details of who is buried where.
9. Take time to clear grass and other foliage away from inscription.
 - a. Take time to clear cut dried grass away from and on top of the headstone before taking a photograph.
 - b. If a branch is grown over the headstone, pull it back and take a photo.
 - c. Clear overgrown grass to the edge of the marker/headstone. Important information/epitaphs may be separated from the main inscription (e.g., bronze marker denoting group or religious affiliation, service in branch of military or fought in specific war).
10. Use a little chalk for the hard to read old headstones.
 - a. Letters on the old stones are often hardly legible.
 - b. Take a little piece of white (or black or any other dark color) chalk and fill letters.
 - c. Or rub the white chalk on the flat surface next to the letters.
11. Tilt your camera to the angle of the headstone.
 - a. Older stones tend to lean or slant.
 - b. Tilt the camera to the angle of the stone and your image will straighten up nicely.
12. Black and gray polished marble shoot at angle.
 - a. Gray or black polished are sometimes hard to read or reflect flash making the image illegible.
 - b. Shoot headstone at an angle and then view on LCD for clarity. Re-shoot at a different angle if needed.
13. Try using flash on headstones covered with shade or on cloudy days.
 - a. If the inscription you just took a picture of is hard to read, try using your flash. The light should provide you just enough extra light to fill in the dark shadows so you can read the lettering.
 - b. Try using flash from angles if needed.
14. Try a soft brush or natural sponge and water to remove surface soil.
 - a. Gentle brushing should remove surface dirt and bird droppings.
15. Try sponge and water on light colored stone. The stone will darken from the water and darken the inscription on the stone.
16. Never use hard objects or stiff brushes to clean the stone.
17. Removing lichens with sharp objects most often destroys the surface.
18. Keep a written record.
 - a. Some of the items to consider as part of the written record include:

1. Location.
 2. Map of the cemetery with the stones numbered.
 3. When photographed (time, date, and frame number).
 4. Transcription of the epitaph.
19. Post your photos of headstones on family websites or sites such as Virtual Cemetery.
http://www.genealogy.com/vcem_welcome.html

7. Consider using your camera in your library, archive, or museum research

Consider using your digital camera as a tool for documenting and capturing information you find in your research. If you have never used your camera in your library research, practice in your local library under all types of conditions, include very low light. The time to learn isn't at a cemetery 2,000 miles from home.

8. Photographing in the libraries

1. Know their policy about digital photography before you go.
 - a. 80% of libraries have allowed me to use a digital camera with some criteria.
2. Do not use flash.
 - a. Usually prohibited due to photo sensitivity of artifacts.
3. Set up photo stand or tripod.
4. You may need to sign an intended uses statement.
5. May need to have one of their staff handle rare objects.
6. Only take photos of intended artifacts.
7. No photos allowed of interior of building or people.
 - a. (Especially in government buildings).
8. Set up camera in a corner away from others so as not to disturb.
9. Set up near a window to gain most from natural light.

9. Photographing museums and archives

1. Check first to see if photography is allowed.
 - a. Most museums and archives will allow photography without a flash.
2. Objects covered with glass or plastic are best shot at an angle.
 - a. Glass/plastic will reflect a flash or act like a mirror and reflect your image under natural light. Consider photographing the object at an angle.
3. Snap a separate picture of a caption or a label of the exhibit.
4. Use the tripod along with your camera's self-timer night/lowlight setting.
 - a. Lack of good lighting is usually the norm in museums.
 - b. Use the tripod to steady your image.
 - c. When you encounter very low light situations, try putting your camera on night setting and enabling your self-timer.
 - d. With the steadiness of the tripod and camera settings you should be able to get some good quality photos.
5. No Tripod? Then brace yourself.
 - a. If it is too dark and there is no tripod, leaning against a wall or a pillar or supporting your camera against a bench, a chair, or a staircase rail will be a good remedy in that situation.
 - b. If a subject is important enough, by all means take an extra shot.

10. Photographing Microfilm

Note: These are the backlit or rear projection readers that shine a light through the film and use a series of mirrors and/or lenses to display an image of the film on a vertical or flat surface. The image displayed on either style can be easily photographed.

1. Depending upon your circumstances you may or may not need to mount your camera on a tripod. I have been able raise my camera up near the projection lens and click the shutter button and get a clear photo with no distortion. If you choose to use a tripod, place your camera on a tripod located in front of the reader screen.
2. Place a white paper on the reader surface as the target area for shooting.
Note: Try other blank sheets of color paper (e.g., pink, blue, yellow) to see if these colors help you with readability of the image.
3. Adjust the camera/tripod position so the information you want to copy fills the LCD frame, not the viewfinder.
4. Set the macro mode if necessary. This will depend on your camera model and how far away it is from the microfilm reader.
5. Make sure the flash is turned off.
6. Set the camera's self-timer if needed.
7. Gently press the shutter button halfway to lock the exposure and focus.
8. Press the button completely down. If using the self-time, move away from the camera and wait for the self-timer to trip the shutter.
9. Take several shots. Consider using the "best shot selector" and/or auto bracketing your shots if your camera has these features or manual bracketing if it doesn't.

Research Services and Fees

Many historical societies and libraries supporting genealogical research provide services to you when you are not able to come to them. These services range from free to a nominal fee. The fees and services cover actual costs. Each search can take from 3 to 8 weeks depending on the backlog and available resources of the organization.

Research/search services. A search is where you ask the organization to help with a request. Acceptable and unacceptable search requests are as follows:

Acceptable:

- Search for a surname in indexed county histories for one county
- Search for one family in a census
- Search for one land owner in land tract records
- Search for one obituary

Unacceptable:

- Compile your family genealogy or complete pedigree charts.
- Answer requests for "any and all" information on an individual or family.
- Speculate why an ancestor did what they did.
- Describe in detail what life in Nebraska was like for your ancestor.
- Analyze long and detailed family histories and determine what searches to do for you.

You can expect the organization to limit the number of searches you can request at one time, usually three. The organization will only process one request. Requests for searches are done by mail and online. They will not initiate searches for other records not specifically requested in your letter and prepayment. The fees for research will range from \$5 to \$30 per search. The fee may vary, depending on if you live in the state or not. For example:

- \$10.00 per search for state residents and members of the state historical society.
- \$20.00 per search for non-residents who are not members of the Society.

In cases where you want the organization to do an extended search, you will be charged by the hour fee. For example:

- \$20 per hour with ½ minimum.

Photocopying services. Photocopying services are available for researchers unable to visit the physical faculty. Researchers are able to request limited photocopies of portions of published works and manuscript collections. Staff are unable to copy entire published works, entire manuscript collections, bound volumes in the manuscript collection, newspapers, or any fragile/sensitive materials. Forms are available on-line and usually require the following information:

- A brief description of the item.
- The manuscript or call number.
- Page numbers (if possible).
- A copy order will be generated and sent to you (via email or mail - please specify), explaining the procedures for ordering and payment.

- When the order form and payment are received, your order will receive prompt attention.

An example of fees associated with photocopying follow:

- .20 to \$1.00 per (based on size).
- Service/Shipping and handling fee \$10 to \$25.
- If order exceeds 50 exposures additional charge is added.
- 10 to 25% fee discount for members or in state residents.

Clear and Concise Queries

Whenever you are requesting information from the library or organization, you need to be very clear and concise. The following are examples of the type of information the research staff will need to complete a search:

Census:

- Exact name of the family (first and last name of head of household).
- Location of residence (county and either precinct or nearby town).

Newspapers: (deaths, marriages, births, etc.)

- First and last name.
- Date and place of event.

Naturalization Records:

- Name of the individual naturalized.
- County where the person was naturalized, if known.

Probate Records:

- Individual's name.
- County where the will was probated.
- Date of death.

Consider Interlibrary Loan

Usually a portion of the libraries/societies collection is available through interlibrary loan. Interlibrary loan allows you to borrow items for specific research and is transferred from library to library. Note: Libraries will usually not exchange information through the LDS Family History Centers. When you start speaking with the library/society, ask the following questions:

1. What is the interlibrary loan policy and procedure of the organization from which you will request information?
 - Are there any costs associated with the loan?
 - What is the length of time permitted for the loan?
 - What is the length of time to process the loan?
 - Is it possible to purchase copies?
 - Are any special forms required?
2. What is the interlibrary loan policy and procedure for your local library?
 - Does the library have the equipment you need to view the requested material? Microfilm reader and printer? Photo copier?

The interlibrary loan comes with parameters such as:

- Order 1 to 5 reels that can be loaned at one time.
- Orders must be received on interlibrary forms.
- Most orders will require a loan fee to be paid at the time of request.
- Fees range from \$5 to \$15 per reel.
- Cost may vary depending on if you are a state resident, non-resident, or member of the society.
- Length of time for loan is 1-4 weeks.

The types of resources that are usually exchanged through interlibrary loan are:

- Census (microfilm).
- Papers (microfilm).
- Original deeds, wills, tax records, vital statistics, etc. (microfilm).
- Maps.
- Books and research guides.
- Photographs (microfiche).
- Military records (microfilm).

It is at the library's discretion to designate materials as non-circulating due to policy, age, condition, or special circumstances. Items that are not usually available, but can be photocopied, include:

- Periodicals.
- Materials in the main reading rooms.
- All books published before a given date (e.g., 1925).
- Printed local history and genealogy, and regimental histories do not circulate out-of-state.

If you have a particular microfilm you wish to own, request if you can purchase copies. This would be advisable if, for example, there was a unique event covering a span of months and you wanted to have detailed coverage to review and study.

Research Techniques for Societies, Libraries, Archives & Special Collections

As a genealogist and family historian, you already have a great insight into research and how to find the answers. In fact, you are pretty resourceful in finding and following clues. As you broaden your research into the local, county, regional, and state resources discussed you will find that much of your research will fall into the working with and exploring “primary” sources. You probably already know the following research techniques, so the next few lines may be a review.

Research using primary sources can be a time consuming process. Unlike library items such as books and serials (e.g., magazines, newsletters), many primary sources do not appear in the library catalog or on the Web. Two of the most common methods of locating materials are word-of-mouth and examining footnotes in relevant secondary sources.

Trace footnotes and endnotes. Footnote and endnote tracing is the use of footnotes or endnotes found in books or articles to identify other relevant material. The advantage of using footnotes to locate materials is that they often provide a citation to a specific primary source within a larger

collection. Sometimes citations even offer commentary on the cited work. Finally, the use of material in a scholarly work provides a way of judging the usefulness of the material.

Talk to scholars or other experts. Talking to people who have already done work in the field of interest is another way of locating relevant primary sources. Within their area of specialization, these experts are apt to be familiar with a majority of the material written about a given topic as well as the major collections of primary sources that support their research.

As a researcher, you will find many “experts” on topics of local and regional topics and research. These individuals will help you locate and find material. I have had experiences where local experts have been the key to unlock doors. For example,

- I was searching in one town for the land of an ancestor. While searching for the property and gravesite, I was referred to a local historian that lived in an out of the way area. After finding the historian, he took me directly to the property and gravesite that was little more than a field with stones on edge for the headstones. Upon inviting me back to his home, he answered key questions I had been searching for. He also had several rare books of local history and genealogies that had been out of print for 75 plus years that he allowed me to digitally photograph. I couldn't have done it without his help.
- I made an appointment with a county historical society several weeks ahead of my arrival, and corresponded via email about my research priorities. Upon my arrival, I found that the staff had
 - Pulled multiple books they had in their personal library and had the information I was seeking already marked.
 - Set out several “family” vertical files on surnames and topics related to my search.
 - Had on duty a member of the society that was knowledgeable about my particular area of the county.
 - Had suggestions of other areas I should research and people with whom I should speak.
 - Had a 17 page unpublished, extensively documented historical society research paper on the formation of a specific church and congregation that my ancestors helped form.

The efforts of the local experts saved me hours of research, and years in searching for information that was only known to the local experts. An expert can also be other professors, historians, or the author of a book or article on a certain topic.

Talk to Librarians, Curators, and Archivists. Most librarians, curators, and archivists are knowledgeable about the subject areas related to their collections. They often know of similar collections in other institutions or other people doing similar work. They are also the best source for information about materials in their repository that may not be listed in a library catalog, website or finding aid.

Google. As more special collection repositories are placing descriptions, finding aids, databases, and digital reproductions of primary sources from their collections on the web, it is possible to do a certain amount of research using Google and other search engines. However, it is important to keep in mind that not everything is available from your home computer. An unsuccessful search does not mean materials about your topic do not exist, but rather it may be necessary to contact or visit the repository in person.

Google indexes millions of pages and can sometimes leave a researcher overwhelmed with the numbers of returned pages. Below are some hints for effectively searching Google for special collection material:

- **Searching for a certain phrase.** For results that include a certain phrase place the text in "quotes." This is particularly helpful when searching for proper names.
- **Use of specific terms.** Use special collections-specific terms such as "records," "archives," "papers," and "manuscripts" to locate relevant primary source material.
- **Use of the + (plus sign).** Google excludes common words and characters as well as single digits and letters. If these are important to your search place a "+" in front of the word or number. Be sure to include a space before the plus sign.
- **How to exclude irrelevant terms.** You can exclude irrelevant terms from your search by placing a "-" in front of words related to the meaning you want to avoid. Be sure to include a space before the minus sign. For Example:

You are researching the Protestant Reformation in the 16th Century and want information on reformer Martin Luther. You type "Martin Luther" into Google and receive 74 million hits. By typing "Martin Luther" – king, the number of hits is reduced to a mere 12 million.

While the number of hits using the "not" operator is significantly reduced, this is also a good example of how too many hits may not be useful. In this case, it might be more productive to look at several books about the Protestant Reformation and see which primary sources the author used.

- **Search all local archives, libraries, and other repositories.** Often other libraries in the area are valuable sources of primary source information. Many public libraries collect books, vertical files, and other types of information on people, places, and events of regional interest. These are materials that may be difficult to find elsewhere.

It is important when researching any topic to speak with the people who work in these places. It is entirely possible that very similar collections exist in multiple locations within a state.

- **Search library catalogs.** Library catalogs are traditionally used to locate books. However, many other special collections materials can also be found by searching library catalogs. These records provide subject and keyword access to very brief descriptions of a collection. Some catalogs also link to finding aids or digital collections.

Special Collections traditionally have a large amount of material that is unprocessed. These materials usually do not appear in catalogs. Institutions often create internal ways of controlling these materials so researchers will need to contact institutions to inquire about unprocessed and/or uncatalogued materials.

Tips for Searching Indexes and Databases. Most library databases work on the same principles when you are searching for a topic: keyword/subject searching and the use of Boolean operators and truncation symbols. Note: These are general guidelines; please consult the Help screens in

each database you use to determine what features are available and how they might be different from those described below, e.g., the truncation symbol may be a dollar sign (\$) instead of an asterisk.

- Keyword searches look for your search terms in the title, author, description, subject heading, and notes fields in the catalog's records. Use only key terms, and not articles (A, An or The), prepositions or most punctuation symbols. This is a good place to begin most searches.
- Title searches look for the word or phrase in the title fields of the catalog's records. Order and spelling are important, but initial articles are ignored.
- Journal Title searches find only journals, magazines and newspapers with the entered title. You can also search the E-journals Database from this screen.
- Author searches should be entered with the last name first. Commas are optional. You can also search for corporate authors as well as directors and stars of movies.
- Author/Title searches combine an author search (last name first) with a keyword search of the title terms, so order of title words in this case doesn't matter.
- Subject searches look for Library of Congress Subject Headings. If you are unsure of which Subject Heading to use, you may want to start with a keyword search.
- Number searches include call numbers and standard numbers. You can search for Library of Congress call numbers, government document call numbers, or locally assigned call numbers, such as video or DVD call numbers. You can also search for standard numbers like ISBNs or ISSNs.
- Advanced searches allow for many more limiting options, such as by publication date, format or language. You can also combine search terms or search fields on this screen.

Keywords vs. Subject Headings Searches

- The use of subject headings (also known as descriptors) is the method by which an index or database has designated "official" terms or phrases for a topic.
- Searching by keyword often can return many results, some of which may be irrelevant to your topic; subject searching focuses the search and returns fewer results; most, if not all, of them will be directly relevant to your search.
- Keyword searching searches many fields, e.g., title, abstract, subject headings, whereas subject heading searching searches only the subject heading field.
- Search first by keyword, find records which are relevant to your search, then look for the subject headings assigned to the record, there are often several -- jot them down, then execute a subject search.

Searching Indexes and Data Bases

Search Tips	This search...	retrieves records with:	
Adjacency. Default. Multiple words are searched together as one phrase.	toxic waste	"toxic waste" in any indexed field (title, author, subject, notes).	
	September song	"September song" in any indexed field (title, author, subject, notes).	
Truncation. Allows searching for different endings of a word. The # symbol can be used to find variant spellings in cases where one version of the word has one more character than another version. For example, colo#r finds both color and colour; and arch#eology finds both archaeology and archeology. Use a single asterisk * to match up to 5 characters. Use a double asterisk ** to match any number of characters. The question mark ? is replaced by exactly one character. The ? character or * character (asterisk) can be placed at the left, right or middle of a portion of a word, but can never be used more than once in a text string. (Ex: multipl? OR multipl* will locate multiple multiples multiply multiplying etc.) The % symbol, followed by a number, can be placed between two words to indicate that you want the words to appear within a particular distance from each other. The ! character, followed by a number, can be placed between two words to indicate that you want the words to appear within a particular distance from each other, and in the same order in which you type the words.	multipl? OR multipl*	multiple, multiples, multiply, multiplying	
	creat*	creature, creation, create, creating, creator, creaturely	
	nation**	nation, nations, national, nationhood, nationalities, nationalizing, nationalization, etc.	
	wom?n	women, and womyn, woman	
	england %3 ballads	Ballads of England , Ballads of Merry Olde England and England and Her Ballads.	
	england !3 ballads	Ballads of England and Ballads of Merry Olde England but not England and Her Ballads.	
Boolean Operators. AND requires that both terms be present. OR allows that either term be present. AND NOT excludes the second term. Use parentheses to group combined terms.	ceylon or sri lanka	"sculpture" and "asia, asian/s, asiatic, etc."	
	ceylon or sri lanka	either "ceylon" or the phrase "sri lanka", or both	
	brunswick and not new	"brunswick" but not "new" (i.e., not New Brunswick)	
	(france or italy) and baroque	either "france" or "italy" AND also "baroque"	
Proximity. Use NEAR to specify words within 10 words of each other	embryo* near develop*	"embryo, etc." and "develop, etc." within 10 words of each other in the same field	

<p>in the same field (e.g., title, subject, etc.). Use WITHIN # to specify terms which occur within # words of each other anywhere in the record.</p>	<p>dream* within 5 interpret*</p>	<p>"interpret, etc." and "dream, etc." within 5 words of each other</p>
<p>Indexed Fields. Specify which fields to search using field abbreviation. Fields available for this search option are a: (author), t: (title), d: (subject), and n: (note). Truncation (*) cannot be used in field searching.</p>	<p>t:bible and d:interpretation</p>	<p>titles that contain "bible" and subjects that contain "interpretation"</p>
	<p>d:shelley and not d:percy</p>	<p>subjects that contain "shelley" but not "percy" (i.e. Mary Shelley)</p>
	<p>a:bach and t:565</p>	<p>authors that contain "bach" and titles that contain "565" (i.e. BWV 565)</p>

Field limits

Field limits may be specified by selecting a field limit from the selection list in the form above. These limits appear before the word or phrase to be searched. A field limit system to search only the specified field for the specified word(s). For example:

Author: Search only author fields
 Title: Search only title fields
 Subject: Search only subject fields
 Note: Search only note fields

Search Tips	This search...	retrieves records
Search by: All Fields	Keyword(s) related to your topic	grapes steinbeck grinch fantasy
Search by: Author It is not necessary to include commas, periods, other punctuation, or capitalization.	king, stephen	Stephen King
	sagan c	Carl Sagan
	name of a corporate author	american society of civil e
Search by: Title <ul style="list-style-type: none"> • Enter all or part of the title. • Omit initial articles in all languages (i.e. the, el, das, les). • If you are unsure of the exact title, try a Keyword search. 	merchant of v	The Merchant of Venice
Search by: Subject Type as much or as little of the subject as you want. Punctuation is optional. The subjects used in the Library's catalog are the Library of Congress subject headings, which may or may not match commonly used terminology. For example, "foreign aid" is not an official Library of Congress subject heading, but "economic assistance" is. To determine an appropriate subject heading(s), try one of the following options: <ul style="list-style-type: none"> • Try your subject as a keyword search, and then look at the subject headings of a relevant title. • Ask a reference librarian for help 	Bolivia Bolivia Foreign relations Washington, George	
Search by: Journal Title Enter all or part of the journal title, beginning with the first word.	national re	National Review, National
Search by: Year <ul style="list-style-type: none"> • Type a year. The search string is truncated to the right, which means that you also can choose not to type the last or the two last figures, if you do not want your query to be too specific, and thus cover a longer period. • N.B. Some documents miss indication of year and the date in these cases is given as an interval of years, as for example 1750-1850. A search by 17 will return a document dated 1750-1850. However, a search by 18 will not. So if you are looking for documents from the 19th century, you should, beside the query by 18, also make a query by 17. 		

<p>Search by: Institutions, associations, works etc. You can use this field if you are interested in documents where institutions, associations, learned societies, books, periodicals etc. are quoted. Type the name or title, or a part of it.</p>	<p>"Royal Society". Can also be searched by "Royal". "Institut Pasteur". Can also be searched by "Past". "La Presse médicale". Can also be searched by "Presse".</p>	
<p>Search by: ISBN/ISSN A specialized search for serials – magazines, journals and serial publications. If you do not find what you are looking for, please try title, author or keyword.</p>	<p>Enter all or part of the ISBN</p> <p>Enter all or part of the ISSN</p>	<p>3166932</p> <p>0043-55</p>
<p>Search by: Gov Pub Call Number Searches for the Superintendent of Documents (SuDocs) Call Number, which identifies materials in the depository of U. S. Government Publications</p>	<p>Enter all or part of Gov Pub call number</p>	<p>Y 1.1 Y 1.1/3 Y 1.1/3:101-10</p>
<p>Search by: Call Number Uses the Dewey Decimal Classification. If you want to know what items are available in a call number area or you have a specific call number, use the call number search.</p>		<p>PR 2894 PR 2894 BR Pr2894.B55</p>
<p>Stop Words A are common words that are not searchable.</p>	<p>AN, AND, AS, AT, BY, FOR, FROM, IN, NOT, OF, ON, OR, THE, TO, and WITH.</p>	

Using Key Words and Controlled Vocabulary

A search statement consists of words and punctuation that are entered in the search box of a library catalog, article database or Internet search engine to find matching records. The simplest search statement is a single word. The first step to creating any search statement is building a list of search terms that describe your research topic as precisely as possible in language that the computer understands. Keywords and controlled vocabulary are two kinds of search terms.

Finding and using keywords

- Brainstorm to select the two or three most meaningful words that describe your research topic.
- Identify broader terms, narrower terms and synonyms.
- A good way to select keywords is to write a sentence that describes your research topic and select the important words to use as keywords.

Example

Research topic: Did Tyrannosaurus Rex have feathers?

Specific keywords: Tyrannosaurus Rex, feathers.

Another good way to select keywords is to select words that describe the broad or generic ideas of the topic.

Example

Research topic: Did Tyrannosaurus Rex have feathers?

Generic keywords: dinosaurs, birds, evolution.

Tip: You may wish to try different keywords or controlled vocabulary words if the first keywords you try get unsatisfactory results.

Subject searching using controlled vocabulary

For many article databases a special list of words called a thesaurus is created to identify the subject content of items within the database. These words or phrases are also called controlled vocabulary, subject headings or descriptors. Controlled vocabulary improves access to information by listing all related materials in the same subject category.

Controlled vocabulary may be used to define broad or generic ideas. For example, in an education article database the phrase elementary education is assigned by indexers to all articles about kindergarten through grade six. Using the controlled vocabulary term will retrieve references to articles on the topic, even if the exact phrase "elementary education" never appeared in the title, abstract or full text of the articles.

Tip: A good way to find controlled vocabulary search words is to try a keyword search first. Pick out the most interesting references and look at the subject headings if given in those references. Then try a subject search using those exact subject headings.

Document/Citing Your Sources

Citing sources, whether using primary or secondary materials, is fundamental to genealogical research and writing. Your citations provide readers and future researchers with a guide to the materials you have used as evidence, as well as a source for others to trace your footnotes for their own research.

Do it right the first time! Whether the source is a newspaper, journal, court record, personal interview, letter, or church record, write everything down while you still have the source in your hands.

Sources you can rely on. No one has a perfect memory, and some sources will have worse memories than others. The only source you can rely on is an "official" one; birth, marriage, death documents, and other confirmable databases and indices. Even if information came from a relative, list their name. You want to stay as accurate as possible, and leave a clear trail for others to follow. Not only will you know you have proof of your information, but others you share the information with will know it is factual, not just speculation.

Sources establish credibility. Unless we are able to tell others where we obtain the information all we are sharing is our opinion. Citing sources is *essential* to establishing credibility. If we have done a good job with our research, we can give others the ability to broaden and build upon the research already done and not have the same work rechecked over and over again.

Write legibly. If you write any information, write legibly. It doesn't pay to hurry and then not be able to read your own hand writing later. When possible, try to get a photocopy or a photo of the key information you are capturing and then enter it into your genealogical program or record database.

Checking sources allow for verification. Checking sources allows verification of spelling, dating, reporting variations, and leads to more information. Relying on the expertise of others helps save time and energy. Create and maintain a record of what resource was checked, so that you don't waste time later. Likewise, some sources (books, newspapers, etc.) might be found at only a few locations. Include where these were in case you need to glean them again.

How valuable is your time? Have you ever tried to pick up the trail of research from undocumented records and spent weeks, months, even years searching for the next clue only to find out the data entered was incorrect?

Six elements of a good source citation. Fundamental elements of a good source citation include:

- Author
- Title
- Publisher's name and location
- Publication date
- Location of the source and identifying information (library or archive where you found the information and its call number)
- Specific information for the piece of data you found (page number, line number)

Type	Information Needed	Formatted
Unpublished Document	<ol style="list-style-type: none"> 1. Descriptive Title of Document: Personal History of John P. Jones 2. Signification dates or Numbers: Written Circa 1935 3. Page Numbers or other Specific Designation: Original owned by Daughters of Utah Pioneers, Spanish Fork, Utah 4. Other Detail: 4-page history written by daughter Mary Jones Wright 5. Location and Form of Record: Copy received and in possession of Barry Ewell, Riverton, Utah, 7 July 1997 	<p>“Personal History of John P. Jones,” Circa 1935, 4 pages, written by daughter Mary Jones Wright, copy received from Daughters of Utah Pioneers, Spanish Fork, Utah, 7 July 1997, in the possession of Barry Ewell, Riverton, Utah.</p>
Journal	<ol style="list-style-type: none"> 1. Descriptive Title of Document: Personal History of John P. Jones 2. Signification dates or Numbers: Written Circa 1935 3. Page Numbers or other Specific Designation: Original owned by Daughters of Utah Pioneers, Spanish Fork, Utah 4. Other Detail: 4-page history written by daughter Mary Jones Wright 5. Location and Form of Record: Copy received and in possession of Barry Ewell, Riverton, Utah, 7 July 1997 	<p>“Personal History of John P. Jones,” Circa 1935, 4 pages, written by daughter Mary Jones Wright, copy received from Daughters of Utah Pioneers, Spanish Fork, Utah, 7 July 1997, in the possession of Barry Ewell, Riverton, Utah.</p>
Personal Letter	<ol style="list-style-type: none"> 1. Author: John Jones 2. Title: Journal of John Jones, Utah Pioneer 3. Description of the Journal: handwritten, 350 pages, leather-bound, January 15, 1887 to March 29, 1895 4. Date: January 15, 1891 5. Specific Location: Journal in possession of Barry Ewell, great, great grandson, Riverton, Utah 6. Page: 106-110, 287 	<p>John Jones, Journal of John Jones, Utah Pioneer, January 15, 1891, [Original handwritten, leather-bound 350 page journal, January 15, 1887 to March 29, 1895, in possession of Barry Ewell, great, great grandson, Riverton, Utah], pp. 106-110.</p>
Personal Letter	<ol style="list-style-type: none"> 1. Author: Mary Jones 2. Description of the Letter: Letter to Barry Ewell 3. Date: 23 February 1977 4. Detail: Weekly Letter from Mary Jones to Barry Ewell on Mission in Munich Germany. Topic of letter was trip to California. 5. Specific Location: Original handwritten letter in possession of Barry Ewell 6. Form Used and Repository: Hand Written 	<p>Mary Jones, Letter to Barry Ewell, 23 February 1977, [Original handwritten letter in possession of Barry Ewell. Weekly Letter from Mary Jones to Barry Ewell on Mission in Munich, Germany. Topic of letter was trip to Utah.]</p>
Book	<ol style="list-style-type: none"> 1. Author: Michael E. Pollock 2. Title: Bonds of Henrico County, Virginia, 1782-1853 3. Publication facts (place of publication, name of publisher, year): Baltimore Maryland, Genealogical Publishing Co., Inc, 1984 4. Page number: 133 	<p>Michael E. Pollock, Marriage Bonds of Henrico County, Virginia, 1782-1853, (Baltimore Maryland, Genealogical Publishing Co., Inc, 1984) p. 133.</p>

Article	<ol style="list-style-type: none"> 1. Author: E.E. Patton 2. Title of the article: The Influence of the Huguenots 3. Name of Periodical: The Huguenot 4. Publication facts (place of publication, name of publisher): Vallejo, California, The Huguenot Society 5. Volume: 10 6. Month/Season and Year: 1939-41 7. Page Numbers: 39-45 	<p>E.E. Patton, "The Influence of the Huguenots." The Huguenot (Vallejo, California, The Huguenot Society), Vol. 10 (1939-41), pp. 39-45.</p>
Oral Interview	<ol style="list-style-type: none"> 1. Title of notes or tape: Oral interview with James N. Ewell 2. Date of interview: 21 October 2001 3. Interviewer: Barry Ewell 4. Present Owner's name and address: Recording owned by Barry Ewell, Riverton, Utah 5. Form used and location: James Ewell was living in Mt. Pleasant, Utah 6. Place of Interview: Beaver, Utah 7. Evaluation information: Interview focused on experiences as policeman in Las Vegas, Nevada from 1968 to 1973. 	<p>"Oral interview with James N. Ewell," 21 October 2001, by Barry Ewell, recording owned by Barry Ewell, Riverton, Utah, James Ewell was living in Mt. Pleasant, Utah. Interview took place in Beaver, Utah, interview focused on experiences as policeman in Las Vegas, Nevada from 1968 to 1973.</p>
Photograph	<ol style="list-style-type: none"> 1. Description: Photograph of Francis Marion Ewell 2. Date of Picture: Circa 1900 3. Location: Spring City, Utah 4. Taken by: George Edward Anderson 5. Specific Location: Glass plates in possession of Brigham Young University, Provo, Utah. 	<p>Photograph of Francis Marion Ewell, Circa 1900, Spring City, Utah, taken by George Edward Anderson, glass plates in possession of Brigham Young University, Provo, Utah.</p>

What Needs to be Cited and How?

All ideas that are not your own need to be cited. Whether you summarize, paraphrase, or directly quote, if it's not your original idea, the source needs to be acknowledged. The only exception to this rule is information or ideas that are considered to be common knowledge. If in doubt about whether something is common knowledge, take the safe route and cite it. The following are additional examples of how to site the types of material you might find in libraries, archives, & special collections.

Documenting Specific Types of Sources Using the Author-Date System	Citation
1 Author: Use form of name given on title page	Bagby, J.W. 2003. The cyberlaw handbook for e-commerce. New York: Harcourt Brace.
3 Editors	Baumer, David L., Julius Poindexter, and Janice Brown, eds. 2002. Cyberlaw and e-commerce. Boston: McGraw Hill.
4-10 Authors/2nd Edition: List all names	Smith, John, Janice Brown, Chris W. Enkunde, and Lois Denmark. 2004. The history of the world wide web. 2nd ed. Chicago: Univ. of Chicago Press.
Chapter in an edited multi-author book:	Heller, Chris, and Andrea Gottlieb. 2001. Gender roles in Ethiopian culture. In Gender in cross-cultural perspective, ed. Sherry Collier, 45-56. Louisville, KY: Pilgrim Press.
Dissertation	Citation
Unpublished	Fitzpatrick, Kerry J. 2003. Effects of mowing on the selection of raptor foraging habitat. PhD diss., Univ. of Maryland.
Abstract, found using a library database	Leahy, Gail. 1998. Inducing white blood cell production in the presence of radiation. PhD diss., Pennsylvania State Univ., 1997. Abstract in Digital Dissertations, publ. nr. AAT 2365548, DAI-B 59/06 (Dec. 1998): 2797.
E-Mail	Citation
E-Mail: References to e-mail, telephone conversations, letters, and other informal unpublished messages to the author are usually incorporated into the text	"In an e-mail correspondence with the author on May 18, 2004, Mary McDermott confirmed that..." An entry in the reference list would be unnecessary in this case.
Journal (Peer Reviewed) Article	Citation
In print-with continuous pagination: May omit issue number	Smith, J.L., and C.N. Farmer. 2004. Ways of coping with obesity: A ten year study. Journal of the American Medical Society 291: 389-399.
In print: Journal without continuous pagination: Include issue number	James, E.W. 2000. Obesity in American schoolchildren: An epidemic. Journal of Nursing 48 (3): 26-44.
In print: Journal that uses issue numbers only-no volume numbers	Smith, Jane. 2001. Obesity among adolescents: A nationwide study. Journal of American Health, no. 12: 18-30.
Online-found through a library database: Include URL of main entrance of service and access date if required	Smith, Jane. 2001. Obesity among adolescents: A nationwide study. Journal of American Health, no. 12: 18-30. http://www.epnet.com/ (accessed June 23, 2005).
Letter to the Editor	Citation

Print Source	More common to cite newspapers using parenthetical references. For example: "In her letter to the editor (Baltimore Sun, May 20, 2003), Melissa Jones stated that..." In this case, no citation would be needed. Otherwise, the citation in the reference list would be: Jones, Melissa. 2003. Letter to the editor. Baltimore Sun, May 20, 2003.
On the Web-found using a library database	Jones, Melissa. 2003. Letter to the editor. Baltimore Sun, May 20, 2003. http://www.epnet.com/ (accessed June 23, 2004).
Magazine Article	Citation
Magazine-weekly and monthly: Weekly and monthly usually cited by date only, even if there are issues and volume numbers available	Elliott, Michael. 2001. Embracing the enemy is good business. Time , August 8. George, Rebecca. 2004. Lucy: Grandmother to humanity. Smithsonian, September.
Online-found through a library database	George, Rebecca. 2004. Lucy: Grandmother to humanity. Smithsonian, September. http://www.epnet.com/ (accessed May 27, 2005).
Newspaper Article	Citation
In print-author known	Epstein, Edward. 2005. It's that time again: Lawmakers revisit daylight saving. San Francisco Chronicle, April 9, 2005, final edition.
In print-author unknown	New York Times. 1995. Corporations adopt on site nurseries. April 19.
Online-found using a library database	Epstein, Edward. 2005. It's that time again: Lawmakers revisit daylight saving. San Francisco Chronicle, April 9, 2005, final edition. http://www.lexis-nexis.com/ (accessed May 16, 2005).
Online news service/site	Sahadi, Jeanna. 2005. Bankruptcy bill passes in House. CNN.com, April 14, 2005. http://www.cnn.com/2005/Polit/house/bankr.html (accessed May 24, 2005).
Web site	Citation
Web sites (Not online news sites)	Sullivan, Danny. Boolean searching. Search Engine Watch. http://www.searchenginewatch.com/boolean/how to.html
Web sites, no author known: Owner of site may be used in place of author	Buddhist Instruction Retreat. Fundamental Buddhism explained. http://www.fundamentalbuddhism.com/buddhism.html

Priorities After Your Genealogy Trip

1. Take time to organize, catalog, and share your findings after your trip

Within hours of returning home you will be unpacked, clothes will be in the wash, you have opened the mail, and have spoken to family and friends about your trip.

Overall you are very satisfied with the goals you were able to accomplish and move forward. I would recommend that within 24 hours of returning you start the process of documenting and organizing all aspects of your trip from photographs to brochures from photocopies to journal entries. Don't let it become another pile of genealogy "to-do's." Items easily become misplaced or forgotten of why it was important.

Follow your usual steps in processing, organizing, and cataloging your information. The following sequence is intended to be a recommendation not a sequence to follow. Don't change your usual sequence if it varies from the order listed here.

1. Analyze what goals were accomplished and how.
 - a. What goals were moved forward and how?

- b. What goals were left undone?
 - c. Did you find new data that requires changes or updates to genealogy records?
 - d. Look at your family tree and see what your next steps will be.
 - e. Do you continue working on the same line or do you start a new direction?
 - f. What are the next steps?
 - g. Start the next research to-do log.
 - h. Add tasks to your existing list.
 - i. Note any questions your research raised.
2. Who did you promise correspondence?
 - a. Why?
 - b. And by when?
 - c. Who do you want to send a thank you to?
3. Review your journal writings.
 - a. Enter into computer.
 - b. Who are the persons, places, etc. that you want to enter into your resource file?
4. If found, new data that revises old data,
 - a. Update your family information (group sheets, pedigree charts).
 - b. In your notes, document your change (sources) carefully so that other family members won't think you have made a mistake and change it back.
 - c. Record the date you made the change.
 - d. Make a backup of your data (clearly label) before you begin data entry of new information.
 - e. Make a backup of your data (clearly label) right after you enter data.
5. If you recorded any interviews of thoughts on tape:
 - a. Transcribe any interviews, noting the date, place, interviewee and interviewer.
 - b. If there is a tape, videotape, photographs, or notes, be sure to indicate that on the transcription.
 - c. If you use exact quotes, put them in quotes, otherwise indicate that you are paraphrasing, so it is perfectly clear.
 - d. If you have the ability to digitize your interviews, do so for backup.
6. Carefully and safely organize documents, copies and your notes.
 - a. Scan documents/copies to be included in your electronic files.
 - b. File the acquired data (hard copies) in your files.
 - c. Make new files as needed.
 - d. If you have a database log, make notes as needed.
 - e. Flag files with notes to yourself if needed.
 - f. Clearly document data acquired, source, and value to your research.
 - g. Make copies for your master file as needed.
7. Organize photos, postcards, brochures, and pictures.
 - a. Scan hardcopy/paper information to be included in your electronic files.
 - b. If desired, insert information into your family tree program if the software allows.
 - c. If you took film or digital photos, write dates, place, and reason of importance.
 - d. Edit photos as needed (e.g. cropping, color correction, etc.)
 - e. Develop a photo log to organize materials.
 - f. Develop a backup file of photos.
 - g. Integrate key photos with family history.
 - h. If you came home with rare original photos, carefully store them (e.g., acid free envelopes, low light, etc).
8. Share information, information doesn't do any good sitting in your files.
 - a. Let others know what you have discovered. Let them share in your excitement.
 - b. Write a letter to family.

- c. Include in family newsletter.
 - d. Post a note on message boards of research data found with documentation.
 - e. Ask questions, if information you found was ambiguous or contradictory, others may be able to help you.
1. Share your resources with genealogy societies, newsgroups and message boards.
 - a. In addition to what you learned about family, share what you learned about libraries and archives in the locations you visited.
 - b. Discuss the scope of collections and services available.

Genealogy Checklist

1. Travel checklist for your genealogy trip

The list of what to bring may seem exhaustive, but it is designed to help review your own needs and choose items to take to make the research trip as effective as possible.

Trust me, there is nothing more frustrating than having traveled a long distance and not have what you need to complete the research. I remember once having a camera battery go dead and there was no store in town that carried the battery I needed. Due to travel schedules, it would be two years later before I could complete that particular research project.

The following list is based on the experience of researchers. Not all items will apply to you. Choose what will be useful as you plan your next research trip.

2. Digital Camera with Built-in Flash

1. Digital Camera
 - a. I recommend at least a 4 mega pixel camera. Note: In libraries, archives, and town halls, ask permission to take photos. My experience is you will receive permission 80% of the time.
2. Two extra sets of rechargeable batteries.
3. At least 512 M of removable storage.
 - a. I carry a total of 3 gig of storage with me. About 3,000 photos JPG format.
 - b. I have had disks that were full which I forgot to clean off or have failed.
4. Electric charger for rechargeable batteries.
5. Transfer cord that links from camera to computer.
6. Car plug extension for chargers (try to get one with 1 or more plug outlets).
 - a. I plug into a 12 Volt outlet (in older vehicles cigarette lighter).
7. Camera stand.
8. Carrying case.
9. Camera manual.
10. Tripod.
11. Copy stand (cookie sheet with markings) and an extra strip of magnets to perform indoor shooting will provide consistent results.

3. Laptop with DVD/CD Burner

1. Laptop
 - a. Not a necessity, but a good idea for those who own or can borrow one.
 - b. Be sure to take external power adapter, spare batteries, and extension cord.
 - c. Remember that foreign countries (Mexico, Canada) may have different voltages than in the U.S. If you go to Europe, you will need to buy a special adapter or you will not be able to use the computer.
2. Considering taking an external hard-drive to transfer large amounts of data.
3. Take time to build electronic folders on your computer for transfer of your data before you leave on the trip. (Electronic folders refer to the place I will transfer data to during the trip from your camera, scanner, etc.)
 - a. I have developed a number of folders depending upon what I am doing. I have named folders by surname, date of being out on the road, city I am doing research in, and so forth.
4. Make sure the software loaded includes:
 - a. Choice of family history software and needed family files.

- b. Word processing software.
 - c. Digital camera utility software needed to transfer images from.
5. Carrying case.
6. Backup disks of favorite software in case you need to reinstall software while on road.

4. Cell Phone with Key Call Numbers Stored into Database/Memory

1. Rechargeable cord.
2. Ear phone cord.
3. Extra phone cord.
4. Extension cord from phone to computer if you use your phone to connect to internet in emergency cases.

5. Scanner/Camera Support Software

1. Scanner support software.
2. Photo/image editing software.
3. Internet software to connect to email, etc.
4. DVD/CD burning software.
5. Carrying case.

Note: Do not take a scanner when traveling via airplane. The scanner will get banged up in transit. If you need a scanner on a trip when you are taking a plane, consider buying a low-end model once you get there for under \$100.00 and leaving it behind as a gift when you come home.

6. Audio Micro Cassette Recorder to Record Thoughts or Interview Persons

1. 5 to 10 hours of blank tapes.
2. You can record entries too long to type or that cannot be copied.

7. Research Folder

Develop a folder that has all the necessary information you need at your finger-tips pertaining to your trip. For example:

1. Goals and objectives for trip.
 - a. Acquisition goals.
 - b. Travel plan and approximate times for each phase of research.
2. Appointment calendar.
3. City, county, state maps.
4. Key contacts, address, phone numbers.
5. "Map quest" maps of destination.
6. Internet printouts that include address, phone numbers of library, historical societies, city offices, etc. that you will be visiting.
7. Printouts from catalogs of key documents you seek to view/film.
8. Internet printout of things to see.
9. Packing list so you can recheck what you brought and not leave anything behind.

8. Scanner

1. Electrical cord.
2. Cord for transferring images from scanner to computer.
3. Note: When researching in courthouses and libraries we usually keep the computer and scanning equipment stowed safely in the car in a large insulated lock box and only bring them in if needed.

9. Necessary Clothes

1. Extra pair of old shoes for muddy, cow occupied fields.
2. Long pants to protect legs from tall grass, briars, climbing fences.
3. Extra clothing for when you get wet or soiled.
4. Hat to protect from the sun.
5. Sun glasses when you are outdoors.
6. Bug repellent.

10. Emergency Food for When You Can't Leave the Research Work

1. Energy Bar.
2. Water.
3. \$5 -\$10 for meals.
 - a. Money for lunch! Time stands still for the engrossed researcher, but the brain still needs food to sustain the substantial amounts of energy required by intensive research.

11. Larger Padded Carrying Case

1. To secure equipment that doesn't require protection.

12. Hard-shelled Suitcase

1. To protect camera and other digital equipment in their own bags.

13. Mapping Program

Example: Hardware in combination with its Street Atlas USA mapping software to take advantage of the Global Positioning System (GPS). Especially when you're going to multiple places over several days that may be hard to find. Rent or have GPS system installed in the vehicle such as Neverlost.

This is extremely helpful when finding cemeteries as well as other locations of genealogical interest.

14. Research Resources

1. Pedigree charts for the families you are researching.
 - a. COPIES (originals stay at home).
 - b. Blank charts for new information.
2. Family Group Sheets for the families you are researching
 - a. COPIES (originals stay at home).
 - b. Blank charts for new information.
3. Census forms, blank preprinted (available for 1790-1930).
4. ID, photo ID.
5. Library and archives, etc. information.
 - a. Location.
 - b. Hours and days open.
 - c. Special staff or departments to see.
 - d. Charts of Dewey Decimal/Library of Congress subject classifications so you can readily locate your subject.
6. Maps.
 - a. Town, county, state, or regional as needed.
7. Research log.
8. Soundex codes for surnames you are checking in the census.
9. Surname list.
 - a. Alphabetical list of all names you are searching in the area.

15. Library Research Helps

1. Envelopes of varying sizes in which to put materials as you receive them throughout the day/trip so you don't misplace/mislabel key information. For example:
 - b. #10 (Business size) letter envelopes for
 - i. Removable camera storage
 - ii. Cassettes
 - iii. Letters/notes you may need to write when persons are not home
 - c. Catalog envelopes 9.5" X 12" for
 - i. Documents
 - ii. Photos
 - iii. Artifacts
2. File folders, empty, for information found on each surname.
 - c. I prefer expanding file folders; they are enclosed on all three sides making a little more difficult for papers to fall out.
3. Note pads (8.5" X 11") with lined paper.
 - a. I like the note pads to be predrilled 3-hole punched. It makes it a little easier to put them in a 3-ring binder for safe keeping during the trip and at home.
 - b. If you don't like the pre-drilled paper, consider carrying a small paper punch of desired size. Punches come in 1-hole, 2-hole, or 3-hole punches.
4. Post-It-Notes.
5. 5 Pencils with erasers or 2 mechanical pencils with extra lead.
 - a. Consider a couple of colored pencils for highlighting different types of notes.
 - b. Consider also taking a small hand-held pencil sharpener.
6. 3 pens.
 - a. Consider a couple of colored pens for writing down different types of notes.
 - b. Note some archives/libraries will not allow you to use pens. Make sure you have pencils available.
7. Erasers, art gum.
8. Money for parking meters and copy machines.
 - a. Assorted change (dimes and quarters).
 - b. One-dollar bills.
 - c. If extensive copying is anticipated, get rolls of dimes or quarters from the bank before you go to the library or archives. Consider using a digital camera capturing the images of books and documents.
 - d. Also consider carrying a money pouch. Divide the cash you are carrying and put into different places so if luggage is lost or stolen, you are not left with nothing.
8. Several sheets of colored paper (yellow, pink).
 - a. Helps when reading faint writing on microfilm reader screens.
9. Ruler.
 - a. 6" or 12," depending on your preference.
 - b. Clear or colored plastic.
 - c. Some people may prefer a miniature tape measure.
10. Flashlight in case the records are under the stairs or in the attic.
11. Calculator.
 - a. Total up costs, distances, ages, etc.
12. Magnifying glass.
13. Special gloves to handle fragile documents.

16. Cemetery Research Helps

Many of the items above will also be useful in cemeteries, with the following additions:

1. Clothing, proper
 - a. Hat to shade from sun
 - b. Sturdy shoes (flip-flops and sandals are not a good choice)
 - c. Socks and long pants, with long-sleeved shirt (protection against sun and ticks)
4. First aid kit
 - a. Include an allergy kit, if you are allergic to bee stings, etc.
 - b. Depending on the area, you may want to include a snakebite kit.
5. Gloves, gardening, in case you have to clear a gravestone by pulling grass.
6. Insect repellent.
7. Mirror (to shine light at headstones, to make inscriptions more legible).
8. Plastic garbage bags, to kneel on if you have to pull grass from around a headstone.
9. Rice papers and crayons, to make rubbings of inscriptions. Be sure to get permission from the person or organization responsible for the cemetery prior to undertaking rubbings.
10. Shovel, small, portable auto shovel, in case your car gets stuck.
11. Sunscreen.
12. Sunglasses.
13. Trowel for clearing away grass around cemetery markers.
14. Umbrella in case of rain or to shade from sun.
15. Sponge and small container for water.
 - a. Inscriptions can be easier to see when dampened with sponge.
16. Chalk can be handy to outline some of the lettering.
 - a. Chalk easily washes away without damaging the headstone.

17. Miscellaneous

1. Canvas bag to carry research tools listed.
2. Notebook, loose- leaf.
 - a. I like the D-ring binders. Papers lay flatter and are less likely to unnecessarily bend when I close the binder.
3. Postage stamps.
 - a. To mail any letters/notes that might need to be written on the spot.
4. Electrical bar strip with at least 4 outlets.
5. Camera cleaning kit.
6. Extra DVDs (large storage media) for data storage when external hard drive is not available.
7. Quart and Gallon size zip lock bags (keep equipment dry).
8. See through mesh cases to hold cords and misc.
9. 3X5 cards or flip pad for writing/notes in the field.
10. Handy backpack, or fanny pack with multiple pockets to store and keep your hands free.
11. Stapler and staple-pulling device (tiger jaws).
 - a. Miniature staplers are available.
12. Scissors (Small).
 - a. Handy for trimming photocopies.
13. Protractor.
 - a. Useful in plotting property descriptions from old deeds.
14. Glue stick.
15. Kleenex, small hand-size pack.
16. Handy-wipes, small pouch.
17. Medications.
 - a. If you are on medication, be sure to take some along. There is nothing worse than getting sick in a strange place.
18. Band-aids.
 - a. For small paper cuts.

18. Extra Notes

1. Note: Check all equipment upon arrival if you are staying long term.
2. Charge all equipment before you leave.
3. Clean removable storage disks.

Resources

Finding Family in the Pages of Local Histories

http://www.ancestry.com/learn/library/article.aspx?article=1688&o_xid=0039826023&o_lid=0039826023&o_xt=39826023

Gems in Local Histories

http://www.ancestry.com/learn/library/article.aspx?article=1224&o_xid=0039826023&o_lid=0039826023&o_xt=39826023

Locating Published Genealogies

http://familytreemaker.genealogy.com/15_genes.html

A Guide to Genealogical Research at the Nebraska State Historical Society

http://www.nebraskahistory.org/lib-arch/services/refrence/la_pubs/guide1.htm.