



Note taking & keeping for genealogists

Genealogical research is like a treasure hunt for the pieces of a circular jigsaw without outer boundaries. As the search extends into earlier and earlier generations, the number of potential surnames of interest doubles at each step, and each introduces a fresh set of collaterals inviting attention. In taking and arranging notes, think big from the start. Collect, when you have the chance, facts which could become of interest later and store them in a flexible manner which is adaptable to widening interests.

Taking notes

It is most important always to be able to distinguish the acts, as the original sources gave them, from the interpretations you place upon them. The former are immutable and all must be capable of explanation: the latter vary as your knowledge and experience increase. Therefore:

1. **Transcribe the data EXACTLY as given**, imperfections and all, and retain the layout of the original (e.g. the columns of a census, or the wording of a testator in a will) because it soon becomes so familiar that any other layout is difficult to read. Snap judgements as to relationships and other genealogical interpretations of a record should not be made whilst the search is being carried out; these come later.
2. **NEVER** abbreviate names of people and places and spell them exactly as they appear. (Standard phrases such as 'lawful son of', 'in memory of', may be abbreviated, but copy variations from the normal as these are sometimes significant - in Scotland 'of' a place often means owner; 'in' is just an inhabitant.)
3. **NEVER expand the abbreviations in the original** which may not have been based on your usual practices (was Jos=Joseph or Joshua?)
4. **Show any omissions** from your transcript by '...'.
5. **Show any doubtful interpretations** by [(?)] and include any alternative interpretations in square brackets as '[=?]'.
6. **Show any additions** in square brackets, if you have added anything not in the original.
7. **Copy any illegible word or letter** as closely as you can to the way it is written. (It may prove easy to read the squiggles later with greater experience of palaeography or of local names, but beware of reading into the squiggle what you want it to say.)
8. **CHECK every note** carefully against the original and **see that YOUR handwriting cannot be misread** before you turn to the next page of the original.
9. **NEVER plan to copy your notes more legibly later** and never recopy without careful checking, for every copying introduces errors. (If you **MUST** copy, keep the original in case there is any doubt.)
Negative information can be as important as positive, so you need to be able to tell not only what you found, but also what you did NOT find, either because it was not there or because you were not looking for it. Most genealogical research consists of scanning irrelevant pages and anything which avoids having to scan them a second time is worthwhile. Therefore on EVERY sheet of your notes:
 1. **Copy ALL references to the surnames of interest**, whether apparently relevant or not.
 2. **Record ALL the names you would have copied** if they had been there (as a note at the head of the sheet).
 3. **Record the thoroughness of your search.** Did you copy every reference to a name or only some and if so which? Were you reading every word, scanning slowly, or scanning hastily in the five minutes before closing.
 4. **Record any gaps** in the original records or in your search of them. (No gaps means that the event probably occurred elsewhere: gaps in your notes make another journey worthwhile, but gaps in the original do not.)
 5. **Record the exact source of the information**, the page or entry numbers scanned, the depository and its call number. (These can save time at the next visit.)
 6. **Record the date of your search.** (This can later offer a clue to your interests at the time and your expertise in searching.)

Filing the notes

As your interests widen you are likely to have to subdivide your files, so keep them flexible:

1. **Use paper of standard size.** (Cigarette packets and old envelopes are difficult to file.)
2. **Use a separate sheet for EVERY surname and EVERY source.** (Mixed records are difficult to rearrange but, if you MUST mix them, use only one side of the paper. Back to back mixtures are impossible to rearrange.)
3. **Use loose leaf files.**

Collating the information

As you begin to interpret and collate the information you have collected and start building up pedigrees in chart or narrative form (see Leaflet No.3). DO remember to:

1. **Date every draft pedigree** and add another date whenever a significant change is made. (Only thus can you tell which draft takes account of what evidence.)
2. **Annotate every fact with its source.** (Only thus can you easily trace the evidence on which to assess it against conflicting data.)
There is usually information about individuals who cannot yet be fitted on to the pedigree. If there are many of these it can be helpful to build up CARD or SLIP indexes as working tools. Remember, however, that such an index is the least permanent form of recording information. For such indexes:
 1. **Use separate slips, cards or sheets for every name** in your records until proven as the same individual, and then record evidence of identity on the joint slip.
 2. **Use a standard layout** on each slip, with places for the basic facts and the source(s) of each, the full names of spouses, children and parents including the maiden names of wife and mother. (Printed cards are available from the Society.)
 3. **Make duplicate slips for women under both maiden and married names**, with the other name after '=' or 'nee' in the heading.
 4. **File the slips alphabetically** by surname, then by the first christian name (with cross reference slips under other pet or nicknames) and then by date of birth. All variant spellings should be interfiled as the same (e.g. Catherine, Katherine, Katie, etc.).

Disposal of the records

Think long-term as well as big. Your researches can save others, now or in the future generations, a great deal of time, but only if they have access to your papers, can find their way through them, and can interpret your notes. So:

1. **Avoid personal abbreviations and hieroglyphics.**
2. **Keep papers anchored in files** in an intelligible order, preferably with your most up to date pedigree on top and the supporting transcripts, extracts, letters, etc., behind. (Bundles of loose papers on miscellaneous families are of little use to other people for no-one is likely to have time to sort and understand them.)
3. **Deposit a copy of your pedigree in the Society's Library** as soon as it is reasonably complete and you have turned to another line. (No pedigree can ever be complete and later changes can be deposited as addenda or replacements.)
4. **Instruct your Executors on the disposal of your files.** The Society's Library is glad to receive files (kept as in para 26, on single surnames and transcripts or extracts for **single** surnames and/or complete for specified dates or places). Random extracts are of little value.