

# GenGuides | NOTETAKING SKILLS

by Genwriters | Save time and frustration

You will want to take the time to learn and practice good notetaking skills. Good notes are a genealogist's lifeblood. You will spend many hours reading books and looking at documents that might not be readily available again, so the quality of your notes becomes crucial.

By following a few simple guidelines, your notes will be more accurate and complete:

- ✓ Record each source before you begin reading it. You will want to keep a list of all sources used, whether information was gleaned from them or not, so get in the habit of writing down all source information first. You can then add a comment if the source proved unfruitful. If you are able to gather information from the source, you will be sure to have the information needed to document your findings. You will also know where to go back to find the source just in case you ever need to refer to it again.
- ✓ Write everything down. When you find a source you must choose how much or how little to transcribe. Take the time now to write it all down. There may be connecting phrases and paragraphs that are irrelevant, but be sure to capture the essence of the source you are reading.
- ✓ Copy all place and people names exactly as you find them. Never change the wording to what you think it should be. This is particularly important with women's names. In many cases women will be recorded with their maiden name even if married at the time. Record each name exactly as you find it. If you wish to add comments of your own for your own

future clarification, place your comments in square brackets [ ]. These brackets denote that the wording inside them is in your own words and not a part of the original source.

- ✓ When spelling errors or variant spelling occur in the document, the use of *sic* inserted in brackets [sic] should be used. This will signal to the reader that the misspelling or error was in the original document and not an error by the note taker or transcriber.
- ✓ Pay particular attention to dates. Most genealogists use the day - month - year (5 August 1976) format for recording dates. When writing the date as 5/8/76, it could be interpreted as either May 8 or August 5, and the year could be 1976, 1876, or 1776. Always write out the month and the year: 5 August 1876.

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**NOTETAKING GUIDELINES**

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- ✓ Write clearly and legibly. This cannot be stressed enough. Write numbers clearly so that they will not be misinterpreted later. Sloppy writing could cause extra work if you must go back to the original source to decipher your notes.
- ✓ Always take notes on the same size sheet of paper. All papers in your files should be the same size sheet of paper including all handwritten notes you make. Always keep a good supply of 8 1/2x 11 inch paper with you.
- ✓ Don't create abbreviations as you're taking notes as they may confuse or mislead you when you review your notes.
- ✓ When taking notes, limit each page of notes to a single surname. You may find multiple surnames in the same source document when researching, but be sure that your notes from that source are separated by surname. This will make filing the papers easier when you return home.
- ✓ Always review your notes immediately upon returning home. If they are not entirely legible (perhaps you were rushed and wrote your notes hurriedly), you might want to retype the notes in your word processor. However, don't be tempted to toss those original handwritten sheets of paper. Staple them to the rewritten pages as a backup and for future reference.

**METHODS OF NOTETAKING**

There are three methods of notetaking. Each has its application depending upon the type, content and condition of the source document.

**ABSTRACTING:** By abstracting, you are summarizing the source. You are putting into your own words the information contained in the source document. Be very careful. You want to be accurate and thorough. You might want to outline the important points of a document, then fill in details that are pertinent to your research goal.

**EXCERPTION:** There is much filler in many documents that is not genealogical in nature. It would be a waste of time to transcribe an entire document when there are just a few pertinent passages. By excerpting you will be writing down the exact wording of certain parts of a document.

**TRANSCRIBING:** It is often not practical or possible to make a photocopy of a document that you wish to keep. Perhaps every word in the document is important toward your research goal. In this case, you will want to transcribe the entire document. You will write down everything exactly as you see it, including misspellings.



## PROPER DOCUMENTATION AND CITATION PRACTICES ARE THE BACKBONE OF GENEALOGY RESEARCH

A fully documented and properly cited genealogy work is convincing and reliable. Get in the habit of fully documenting everything. While it may be cumbersome in the beginning, it will soon become second nature. You will reap many benefits from beginning this disciplined approach. When you share your information with others, you will be happy you documented everything—your work will be validated and you will appear professional.

Just a few of the many benefits of documenting your research:

- ✓ It helps to prevent duplication of research. When your work is documented, you will know which sources have been researched, and how fully they were researched.
- ✓ It gives others confidence in your research. You might not be planning to publish your work, so documenting your work might seem like a needless activity. However, you might find yourself in a position to share your research with a long-lost, or newly-found, cousin. They will want to know the source(s) for the information you are sharing to verify its validity.
- ✓ It makes your research go easier and faster. There will be gaps in time when researching particular family lines. For one reason or another, a few months, or even years, might pass before you are able to continue researching a family ancestral

line. During this time, your memory will fade. By documenting all work fully, you will be able to pick up your notes at any time and continue from where you left off with no wasted time or energy trying to figure out where you are in your research.

Documenting your work doesn't have to be difficult. Perhaps your goal is to share your research only with family members or that long-lost cousin. You will want to adhere to the basic rule to provide enough in your documentation that another researcher can determine what was searched. This means, at a minimum, you will want to document title, author, publisher name and city, published date, the location of the source and the call number for the source, if applicable. Be specific enough that you could easily put your hands on the document again if you needed to.

There are many guides you can follow, some specifically written toward genealogy research.

*Evidence! Citation & Analysis for the Family Historian* by Elizabeth Shown Mills

*Producing a Quality Family History* by Patricia Law Hatcher

*Evidence Explained: Citing History Sources from Artifacts to Cyberspace* by Elizabeth Shown Mills

Certainly if your goal is to write a fully-documented family history, you will want to invest in a citation manual and follow its guidelines such as the *Chicago Manual of Style*.