

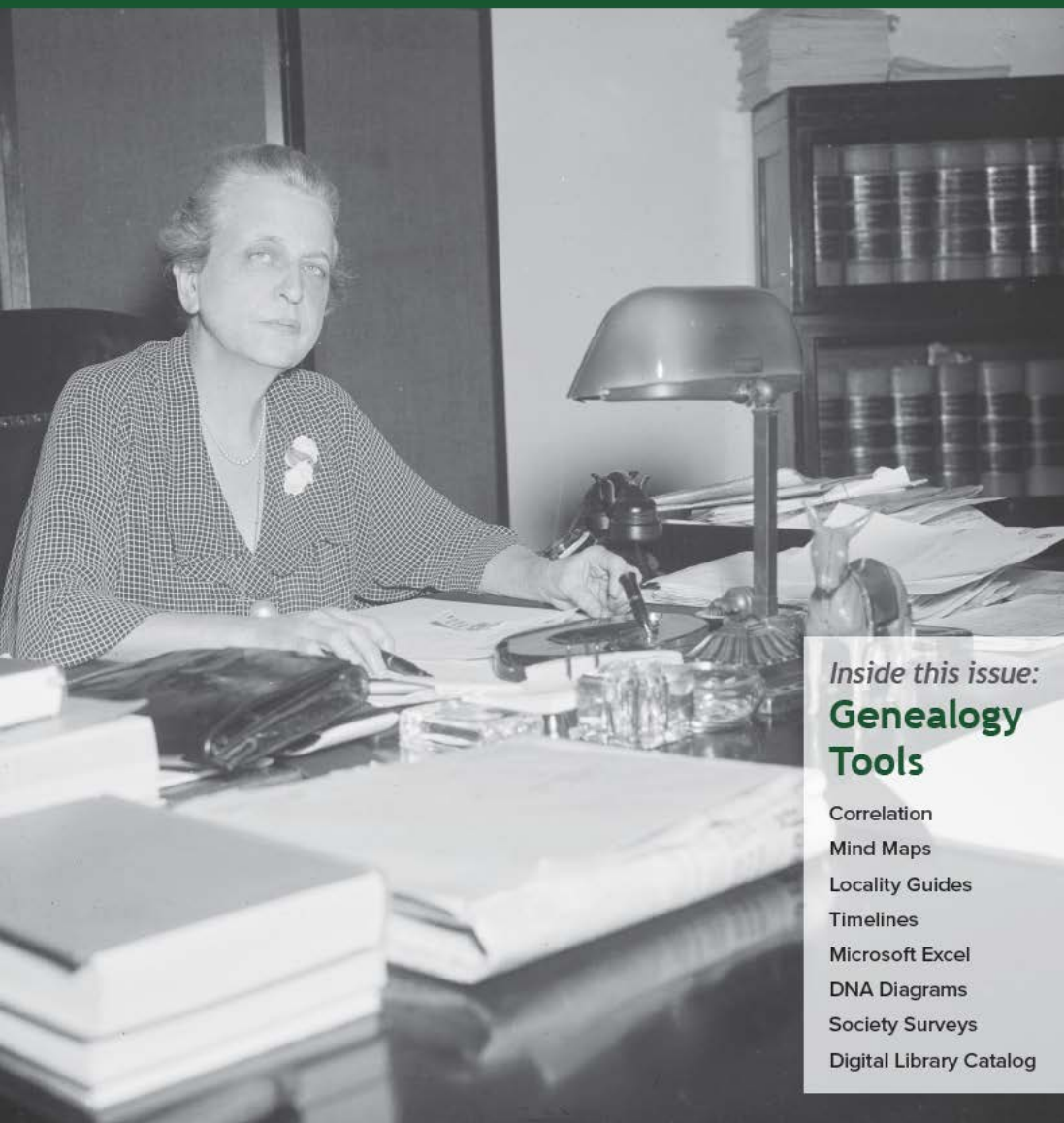


FOR GENERATIONS PAST, PRESENT, AND FUTURE

NGS Magazine

VOLUME 48, NUMBER 3

JULY-SEPTEMBER 2022



Inside this issue:

Genealogy Tools

Correlation

Mind Maps

Locality Guides

Timelines

Microsoft Excel

DNA Diagrams

Society Surveys

Digital Library Catalog



NGS

National Genealogical Society
6400 Arlington Blvd., Suite 810
Falls Church, VA 22042-2318
Phone 703-525-0050 or 800-473-0060
E-mail ngs@ngsgenealogy.org
Website www.ngsgenealogy.org

NGS MISSION

Our mission is to inspire, connect, and lead the family history community. We foster collaboration and best practices in advocacy, education, preservation, and research. We enable people, cultures, and organizations to discover the past and create a lasting legacy. For Generations Past, Present, and Future.

NGS MEMBERSHIP

To join the National Genealogical Society, see the Society's website, www.ngsgenealogy.org; telephone 800-473-0060; or e-mail membership@ngsgenealogy.org.

NGS BOARD OF DIRECTORS

President

Kathryn M. Doyle, California

Vice President

Ellen Pinckney Balthazar, MS, Texas

Vice President Society & Organization Management

Cheri Hudson Passey, South Carolina

Secretary

Ronald V. Hodges, PhD, California

Treasurer

Deborah Lebo Hoskins, CPA, Pennsylvania

Directors

Janet A. Alpert, FNGS, South Carolina

Bernice Alexander Bennett, Maryland

Angie Bush, MS, Utah

Judy Nimer Muhn, Michigan

Ed Donakey, Utah

Marlis Humphrey, Florida

Andre Kearns, Washington, DC

David E. Rencher, AG, CG, FIGRS, FUGA, Utah

Faye Stallings, CG, Texas

Benjamin B. Spratling III, JD, Alabama
(Past President)

NGS STAFF

Education course manager Mary Kathryn Kozy

Education director Angela McGhie, CG

Executive director Matt Menashes, CAE

Member services manager Susan Yockey

Organizations and communities manager Kate Smith

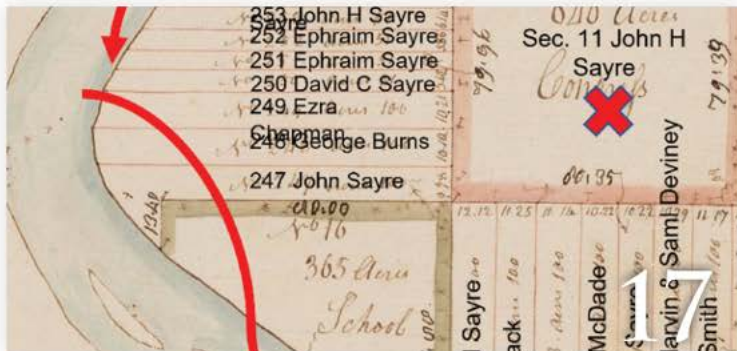
NGS MONTHLY INTERIM EDITOR

Terry Koch-Bostic, New York

NGS QUARTERLY EDITORS

Nancy A. Peters, CG, CGE, South Carolina

Allen R. Peterson, AG, CG, Texas



Features

- 14 **NGS 2023 Family History Conference: Specialized Research Facilities in Virginia**
Teresa Kelley
- 17 **Correlation: A Powerful Research Tool**
Shannon Green, CG
- 25 **Enhancing Source Analysis with Mind Maps**
Amy Larner Giroux, PhD, CG, CGL
- 31 **Creating and Using Locality Guides as Genealogical Tools**
Jan Joyce, DBA, CG, CGL, AG
- 37 **Using Timelines to Gain Perspective on Research Problems**
Cari A. Taplin, CG
- 43 **Unlocking the Power of Microsoft Excel for Genealogical Research**
Jill N. Crandell, MA, AG
- 50 **Researching US Servicemen in the Mexican War**
Craig R. Scott, CG, FUGA

Departments

- 2 **PRESIDENT'S MESSAGE**
Kathryn M. Doyle
- 4 **EDITOR'S NOTE**
Deb Cyprych
- 5 **NGS NEWS**
- 8 **Make Connections on FORUM**
Kate Smith
- 10 **2022 NGS Awards and Competition Results Announced**
Judy Nimer Muhn
- 56 **DNA DISCOVERY**
Charts and Diagrams for Genetic Genealogy: Organization, Analysis, and Reports
Paul Woodbury
- 60 **SOCIETY FORUM**
Surveying Society Membership: Part 1, Questions
Rhonda Hoffman, MLS
- 63 **REFERENCE DESK**
Maintaining a Personal Genealogy Library Catalog in the Digital Age
Kathy Petlewski, MSLS



Top of page: Correlation of taxpayers and census heads of household in Letart Township, Meigs County, Ohio, in 1820, showing the path of the census enumerator. Base image courtesy of Marietta College Library, annotated by Shannon Green.

On the cover: Woman working at desk, 1936 or 1937, Harris & Ewing photograph collection. Her tools include a telephone, pens, books, files, loose papers, and a donkey statuette—perhaps to stimulate her imagination. *Library of Congress* (<https://www.loc.gov/item/2016887861/>).

© 2022, National Genealogical Society. *NGS Magazine* (ISSN 1529-4323) is published quarterly for members of the National Genealogical Society and sent to libraries by subscription.

Creating and Using Locality Guides as Genealogical Tools

Jan Joyce, DBA, CG, CGL, AG

They've been called locality guides, research reference guides, location resource inventories, and even cheat sheets. Regardless of the name, they typically have one objective—to improve research effectiveness through knowledge of a locale. This improvement comes in many forms including quicker searches and results, redundant search elimination, and comprehensive search options.

These valuable guides aren't publicly available for every locality or research purpose, but genealogists can create individualized locality guides for their own benefit. A guide can make research fast. Efficient. Easier. Comprehensive. And more successful. Extensive writing is not required, since most of the guide can be composed of links. The goal is not publication but production of a tool that can be used and refined to suit a researcher's needs.

This article offers a step-by-step process for developing a locality guide. Two examples, more details, and a template are available on the author's website, as explained below.

Why create a locality guide?

Locality guides are particularly useful in these circumstances:

- ongoing and extensive research required in one locale (a town, county, state, or foreign country)
- many ancestors who resided in one location
- brick wall research benefitting from knowledge of lesser-known resources

Many guides already exist in different forms, online and offline. But in some cases, existing guides are insufficient, and researchers will benefit from creating their own. Consider writing a guide in these situations:

- No guide for a jurisdiction has been produced.
- Available guides don't have the specific types of information needed.
- Guides are out of date and don't accommodate changes.

HOLMES COUNTY LOCALITY GUIDE

Location: Holmes County, OH
By: Jan Joyce

Time Period: 1824–20th Century
Updated: 19 Dec 2021

Record Type	Quick Links for Records or Reference		
	Created or kept at Local – County / Town Holmes County	Created or kept at Regional – State(s) Ohio	Created or kept at National USA
Links within LG:		Links to online records or descriptions:	
Birth*	<input type="checkbox"/> 1867+ on FS	<input type="checkbox"/> Ohio History	n/a
Marriage	<input type="checkbox"/> 1824+ on FS	<input type="checkbox"/> 1908+ OH Dept Health	n/a
Death*	<input type="checkbox"/> 1867+ on FS	n/a	n/a
Federal Census	<input type="checkbox"/> 1830-1920 microfilm	<input type="checkbox"/> Ohio History	n/a
State / Local Census	n/a	<input type="checkbox"/> 1883 Quadrennial	<input type="checkbox"/> Ancestry <input type="checkbox"/> FamilySearch
Deed / Land	<input type="checkbox"/> 1824+ on FS	n/a	n/a
Cemetery	<input type="checkbox"/> By Township on Holmes Library	<input type="checkbox"/> Cemetery Search by OGS	<input type="checkbox"/> BLM-GLO <input type="checkbox"/> Entryman's List** <input type="checkbox"/> NARA
Probate / Will	<input type="checkbox"/> 1824+ on FS Search <input type="checkbox"/> 1824-1867 browse <input type="checkbox"/> 1848-1935 browse <input type="checkbox"/> 1825-1906 wills	n/a	<input type="checkbox"/> FindAGrave <input type="checkbox"/> BillionGraves <input type="checkbox"/> Others
Court – Other	<input type="checkbox"/> 1824+ on FS <input type="checkbox"/> 1824+ on USGenWeb <input type="checkbox"/> Requests at Holmes Co Library (originals at Gen Soc)	<input type="checkbox"/> NARA Chicago	n/a
Tax	<input type="checkbox"/> 1825-1832 & 1837-1838 on FS	<input type="checkbox"/> See Local	n/a
Directory	<input type="checkbox"/> None	n/a	n/a
Immigration	<input type="checkbox"/> Probate court	<input type="checkbox"/> NARA Chicago	<input type="checkbox"/> On Ancestry <input type="checkbox"/> Steve Morte
Naturalization	<input type="checkbox"/> To 1906/1917 Co Probate Ct	<input type="checkbox"/> 1917+ Federal District Courts of OH <input type="checkbox"/> NARA Chicago	<input type="checkbox"/> 1906-1917 US Naturalization Service
Church	<input type="checkbox"/> By denomination	<input type="checkbox"/> Ohio History	<input type="checkbox"/> By denomination
Newspaper	<input type="checkbox"/> Premier 1843-1924	<input type="checkbox"/> Ohio History	<input type="checkbox"/> Newspapers.com

© 2022 Jan Joyce

First page of the author's "Holmes County Locality Guide"

Jan Joyce, DBA, CG, CGL, AG, is a genealogy researcher whose personal work focuses on her Iowa, Ohio, Pennsylvania, and Wisconsin immigrant ancestors from England, Germany, Ireland, and Norway. In 1998, she began managing the marketing initiatives at Genealogy.com which prompted researching her family. Her genealogy career is focused on her own research and writing as well as teaching research methodology.

- Guides don't have links to online information in a format that makes them easy to find and use.

On the flipside, there may be no need to develop a guide when only a few documents are needed in the locale, or when the geographic area will not be frequently researched.

Creating and refining a personalized guide helps researchers learn and retain specific information about a locality. Notes on sources can be customized. Development of a guide expands the understanding of a location and its many facets, from records to laws to customs. Researching the location increases knowledge not only of the more obvious records, say the birth and death records for a certain time period, but also the records that may be tucked away in a library drawer, such as microfilmed county tax records that have not been digitized.

In the fluid process of locality guide creation and usage, the guide can be continually refined and updated as a researcher uses it and learns more about the locale.

Guide creation

A guide can be limited or extensive, written in an hour, or developed over time. Creating the guide takes just three steps: targeting the geographic location, conducting a literature review, and then writing the guide.

Step 1 - Target the geographic location

Boundaries for locality guides may be broad, such as a country, or narrowly targeted, such as a county within a state.

Country focus

If ancestors from an unfamiliar country or large region have been identified, learning about record availability and access is a starting point for research. Create a guide for a country to enhance knowledge of its records. State, regional, county, or town guides can be nested within the country guide if desired. Laws, traditions, and nationally generated and housed records should be noted in a country guide.

State or regional focus

Each US state and region offers vastly different access to records. This type of focus may be appropriate in some other countries as well. A state or regional guide should mention laws, customs, and their availability in addition to state-generated or state-housed records. For research in multiple counties or towns in the same state or region, this guide can easily accommodate more sections.

County or town focus

Counties and towns are typically rich with the records genealogists love—deeds, vital records, probates, and more. This type of guide usually lists a significant number of county-generated records and their current locations in the county, a state repository, or online through a third party. A county or town locality guide should almost always be used with both a state guide and a country guide to ensure a comprehensive approach.

Step 2 - Conduct a literature review

The next step is to learn about the targeted location.¹ Check guides that already exist, if available, such as in the FamilySearch Research Wiki.²

Additional sources of locality information include

- the National Genealogical Society's Research in the States series, covering thirty-one states (see list on back cover)
- USGenWeb sites for a state, county, or town
- webinars provided by FamilySearch (https://www.familysearch.org/en/wiki/Family_History_Library_Classes_and_Webinars) and Legacy Family Tree (<https://familytreewebinars.com>)
- county history books (other countries may have unique comparable resources), as shown in figure 1
- books, magazines, and journals focused on genealogical topics for the area such as immigration and migration, religion, and ethnicity
- historical societies, genealogical societies, libraries, and universities
- internet searches

¹ Websites cited in this article were viewed on 25 January 2022.

¹ Jan Joyce, "Literature Reviews Are Not Just for Academicians! Advance Your Genealogy Research," *Crossroads Magazine*, vol. 16, no. 1 (Winter 2021): 28-32.

² "FamilySearch Research Wiki: A Genealogy Resource Guide," *FamilySearch* (https://www.familysearch.org/wiki/en/Main_Page), database, updated 21 January 2022.



Figure 1. Ohio and Holmes County books, photo by author

Be careful when viewing wikis and websites with user-generated content, as they often have errors or omissions. Published guides may be outdated. Look for confirmation in other sources.

Locality information

During the literature review, gather

information about the locality for use in the guide. Categories may include

- maps of jurisdictional changes, land ownership, and distances to county seat
- contiguous jurisdictions (see figure 2)
- links to gazetteers, especially if regional boundaries and/or languages changed
- land allocation (federal, state, or military grants; deeds)
- links and titles of genealogical and historical books, articles, and databases pertaining to the area, including laws, statutes, and catalog searches
- repositories and other local resources
- history of the area including formation and important events

Sources and record sets

Collect information about the locations and dates of record sets and sources, such as

- birth and death
- census: federal, state, local
- church
- city directories
- county histories
- court
- immigration
- land
- maps
- marriage
- military
- naturalization
- newspapers
- probate
- tax

Decide what types of information suit the type of guide desired. If only vital records, deeds, and probate files are needed, focus on those sources. Generally, information about all record types is necessary for thorough research. Find out what record sets no longer exist or have gaps (and why), and what types of alternative sources are available. Determine where records were kept and where they are now.

Step 3 - Write the guide

Summarize and cite the information obtained in step 2, using a word processing format based on personal preference (or use the template provided at the end of this article). Options include Microsoft Word, Google Docs, OneNote, Scrivener, Evernote, Airtable, or perhaps a personal website or blog.

Consider using these best practices, regardless of which software is chosen:

- Place record links in a prioritized sequence to find them easily (e.g., vital records first).
- Include links to all online information sources and data sets, as shown in figure 3.
- Note the specific geography and time period.

Jurisdictions

- Holmes County was created in 1824 from Wayne (to the north) and Coshocton (to the south). [Jurisdictional history on Newberry.](#)
- 6 counties border Holmes: Wayne, Stark, Tuscarawas, Coshocton, Knox, and Ashland.
- Richland County does not border Holmes but is a relevant contiguous county because Ashland was formed from it later, in 1846.
- [1875 County Map.](#)
- [Nashville map.](#) [Millersburg Map.](#) [Holmesville and Napoleon maps.](#) [Weinsberg and New Carlisle maps.](#) [Middletown and Oxford maps.](#) [Benton, Berlin, Big Prairie, Farmerstown maps.](#)
- [Township maps](#) starting here.
- 14 townships comprise Holmes Co.
- [Millersburg](#) is the county seat, located in Hardy Twp.

Figure 2. "Holmes County Locality Guide," page 7

- Improve the ability to skim with tables and bullet points.
- Use endnotes, not footnotes, to keep access to key information prominently placed.
- Craft citations to negative search results for reference.
- Create a digital bookmark folder on a preferred internet browser.

Birth & Death Records (Probate Court)

- [Birth records, 1867-1966; death records, 1867-1908](#) on FS.
- [Ohio Department of Health](#) – Vital Statistics for births 1908-present
- [Births and deaths were recorded by counties as early as 1867 and then by the state beginning late 1908.](#) Holmes Co. was fairly compliant, and many records can be found.

Area	Volume	Item	Dates	Image #	Film #
Ohio		Births	1841-2003	Browse county	
Holmes	Vol 1	Births	1867 - 1877	Image # 108	Film 477154 DGS 4978704
Holmes	Vol 2	Births	1878 - 1893	Image # 367	" " " " " "
Holmes	Vol 3	Births	1893 - 1908	Image # 9	Film 477155 DGS 4016798
Holmes	Vol 4	Births*	1908 - 1956	Image # 318	" " " " " "
Holmes	Vol 10	Delayed Births	1856 - 1957	Image # 1	Film 5328869
Holmes	Vol 11	Delayed Births	1867 - 1966	Image # 1	" " "
Holmes	Vol 1	Deaths	1867 - 1877	Image # 289	Film 477154 DGS 4978704
Holmes	Vol 2	Deaths	1878 - 1893	Image # 587	" " " " " "
Holmes	Vol 3	Deaths	1893 - 1908	Image # 209	Film 477155 DGS 4016798
Ohio		Deaths	1908 - 1953	Browse by Washin	
Ohio		Deaths	1908-1963	Index	
Ohio		Deaths	1908-1932, 1938-2018	Index	

* Certificates should also exist for these at state level.

Tips:

- Dates are mixed so keep searching forward and backward when browsing.
- The click-through [indexed](#) FS search does **NOT** give death record results.
- Death records are located at the end of volumes 1-4 on two different microfilms found on the landing page linked above. Browse through them to find the record based on approximate date and then likely grouping by township. Volumes 1 & 2, then 3 & 4 are combined, so browsing must be done twice within each digitized set.
- Delayed birth records are indexed at the beginning of Vol. 1.

Figure 3. "Holmes County Locality Guide," page 3

Some practices should be avoided in writing this type of locality guide. They may include

- **Information overload.** This style typically falls into historical narrative. Instead of rewriting history in the guide, include only the most essential items and links to more information that can be referenced as needed.
- **Adding repository contact information.** Including repository addresses, business hours, and parking information is a waste of space, since the details may change. Instead, include a link to the repository's web page that can be viewed if a visit or call is needed.
- **Copying and pasting.** Creating a guide by simply repeating information from other guides doesn't maximize retention of material. Instead, focus on experiencing the guide through thoughtful development and use.

Guide utilization and refinement

The guide, or its draft, is complete after the first three steps. There are two final steps: utilizing the guide and refining the information.

Step 4 - Utilize the guide

A locality guide can be helpful in many research situations.

- **Getting started.** Working in an area new to the researcher is a natural time to create and use a locality guide. It provides a jump start by combining important information and links in one place.
- **Checklist.** If the guide is set up succinctly, it can serve as a checklist for almost any kind of research objective.
- **Work-in-progress.** Add placeholders to a guide for information to insert later and reminders for research that can't be done immediately.
- **Brick wall.** Refer to the guide when stuck on what to do next and where to look, whether for a simple question, "When was she born?" or a more complex question, "Who was her father?"

▪ **Template.** Note the format, layout, and other sections that work well, for use in a template for the next guides developed.

Step 5 - Refine information

In both content and format, the guide should evolve as it is used. New sources, tricks within an online access system, or template efficiencies will emerge over time. The need for specialized information may arise. Update the current guide and make changes to the template for future guides. Add nuanced techniques learned by doing research in each unique locality, such as scrolling to the end of ledger-style birth records to find the unindexed death records for a county.

Consider the following techniques to elevate the locality guide:

- Call (or even better, visit) a staff person or volunteer at each of the repositories mentioned in the guide. Ask targeted questions about holdings and update the guide. Retain contact information such as emails and phone numbers for future reference.

LOCALITY GUIDE FOR HOLMES CO., OH

Author's locality guide web page

- Find local experts who are not affiliated with the repositories through the Board for Certification of Genealogists, International Commission for the Accreditation of Professional Genealogists, or the Association of Professional Genealogists. Ask them to review the guide and provide suggestions for additions and improvements.
- Join the local genealogical society to receive announcements of webinars and publications.
- Skim journal and magazine articles that mention the locale. Acquire and document new sources by mining citations within the articles.

Case study and template

Reading others' locality guides provides ideas and opportunities to improve. A case study on the author's website demonstrates the use of these steps in developing a guide for a US county.

Scan the QR code or visit <https://genealogylogically.com/locality-guide.3> The locality guide is available for perusal in two versions, one extensively crafted and one more limited.

The Microsoft Word template used for the author's guide (see figure 4) is being made available complimentary for NGS members through 31 December 2023. Resources for learning how to

create and use locality guides are included on the web page.

Conclusion

Reasonably exhaustive research, one of the components of the Genealogical Proof Standard, can only be performed by studying location, records, and time period. Creating a locality guide supports meeting genealogy standards 12, broad context; 13, source-based content; 14, topical breadth; 17, extent; and 76, source guides.⁴

Using a personal style and format to create guides serves each genealogist best. Adapt the five steps for developing and using guides to meet individual needs: target the geographic location, conduct a literature review, write the guide, utilize the guide, and refine information. 🌱

[Location here] LOCALITY GUIDE

Location: [City, State or Country] Time Period: [date range here]
By: [Your name] Updated: [date last updated here]

Quick Links for Records or Reference

Record Type	Created or kept at Local – County / Town [Location]	Created or kept at Regional – State(s) [Location]	Created or kept at National [Location]
Links within LG: Links to online records or descriptions:			
Birth	[Link here]	[Link here]	[Link here]
Marriage	[Link here]	[Link here]	[Link here]
Death	[Link here]	[Link here]	[Link here]
Federal Census	[Link here]	[Link here]	[Link here]
State / Local Census	[Link here]	[Link here]	[Link here]
Deed / Land	[Link here]	[Link here]	[Link here]
Cemetery	[Link here]	[Link here]	[Link here]

Figure 4. First page of locality guide template offered by the author

3. Jan Joyce, "Locality Guide for Holmes County, OH," *Genealogy Logically* (<https://genealogylogically.com/locality-guide>).

4. Board for Certification of Genealogists, *Genealogy Standards*, second edition (Nashville, TN: Ancestry, 2019), 1-3, 11-32, 42. Also, Nancy A. Peters, "Reporting on Research: Standards Encourage Better Communication," live presentation sponsored by the Board for Certification of Genealogists, *National Genealogical Society* (<https://www.playbackngs.com>); recording of webinar given at 2019 National Genealogical Society Family History conference.