

Organizing Your Genealogy Research Process

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Objectives of this session:

By the end of this session, attendees should be able to:

- Identify a research goal
- Create a manageable project based upon that goal and break it down into appropriate sub-projects and tasks
- Track tasks using an appropriate tool
- Use a research log to record research questions, searches, and results
- Use Evidentia to follow the research process from source to information to evidence to conclusion
- Copy conclusions into a genealogy database program

1. Goals:

- Ask yourself what you hope to accomplish by doing research:
 - Is there an upcoming event that figures into your research?
 - Are you hoping to write a book?
 - Are you a volunteer for a project or a professional with clients?
 - Are there particular surnames or families of interest?
- Beginners should choose goals that are easy to attain; more experienced researchers will need more of a challenge to maintain interest
- Avoiding having too many goals

2. Projects, sub-projects, and tasks:

- Define a manageable project that will achieve a goal
- Examples of projects ranging from easier to more difficult: (1) identifying all 8 great-grandparents, (2) taking a surname as far back as possible, (3) identifying all descendants of an ancestor
- Break the project into sub-projects (such as generational, geographical, genealogical, or a combination)
- Give each sub-project a deadline and create a timeline

- Identify the tasks needed to accomplish each sub-project (you can add to this as you go)

3. Tracking tasks:

- Decide whether to use paper or a digital tool
- Choosing the right digital tool will depend upon such things as:
 - operating system
 - mobile availability and syncing
 - due/defer dates
 - priority flagging
 - interaction with email
 - notifications
- You may want to use a tool that you're also using for non-genealogical purposes
- Perform annual, monthly, and weekly reviews of your progress
- Share your progress with genealogy friends in order to help your motivation

4. Research logs:

- Use to document:
 - goals
 - projects
 - questions
 - sources
 - searches
 - findings
 - analysis
 - evidence
 - conclusions
- Tools that could be used for a research log:
 - paper (notebook)
 - a blog
 - note-taking software (such as Evernote)
 - specialized genealogy research software

5. The research process itself:

- Genealogy software programs are designed to record conclusions (as “facts”) and display the results in various ways
- Other types of software products focus on other aspects of the research process (GenSmarts, Clooz, ResearchTies), such as identifying missing data, suggesting sources, recording documents, recording searches and their results
- Evidentia supports the elements of the Genealogical Proof Standard (published by the Board for Certification of Genealogists):
 - Searching for sources
 - Citing sources
 - Analyzing information
 - Resolving conflicting evidence
 - Constructing a conclusion based on evidence and logic
- Evidentia provides for
 - the categorization of a source as an “Original Record”, a “Derivative Record”, or an “Authored Work” (citation templates for common source types are provided)
 - the categorization of information as “Primary”, “Secondary”, or “Indeterminable”
 - the categorization of evidence as “direct”, “indirect”, or “negative”
 - analysis of the evidence and a summary conclusion
 - reports that can pull individual conclusions into an argument that can serve to create a general conclusion

6. Conclusions and genealogy database software:

- Once conclusions have been created (using evidence and an argument), they can be copied into genealogy database software
- Online trees are useful for sharing info with relatives or as “cousin bait”, but should not be used to replace desktop genealogy software
- The text of the proof argument can be pasted into the note field associated with the fact being established
- Use your software’s features to minimize errors in entering data
- Run regular reports to catch earlier errors and problems
- If you are also using an online family tree, schedule a regular synchronization with your desktop software
- Use your software’s ability to help you find hints in online record databases
- Produce reports to document your progress on your project and to highlight missing information for future tasks
- Backup your data on a regular basis

7. For more information:

- *Mastering Genealogical Proof* by Thomas W. Jones (published in 2013 by the National Genealogical Society)

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