Why Use a Genealogy Research Log?

If you’re a beginning genealogist you want to research “the right way” and if you’re an intermediate one, you probably have learned from your early mistakes. While some would argue as to what is “correct” we would probably all agree on these points as to what a research log could and should do:

- **Create an action plan.** Many genealogists have some sort of research plan whether it is written down or in their heads. A research log can help you fine tune that research plan and convert it into an action plan. For many of us, that is the challenge . . . getting from “What I want to look for” to “Oh, look what I’ve found!”

- **Keep yourself organized.** Do you spend hours just bouncing around on Ancestry.com or another website? What about in-person at a repository . . . do you use your time wisely or just go from resource to resource? A research log can help you not only organize your research finds, but also identify areas where you need to do more research.

- **Allow instant recall.** Even if you are successful at finding the records and information you need in genealogy, what good is it if you can’t locate that information easily and quickly? Especially if you store your finds on a computer, it helps to have a “map” to where all that stuff is! Use links and entries in a research log to find items fast.

- **Reduce “do-overs.”** There’s nothing worse than spending time researching only to find out that you already had that particular record. A research log let’s you know where you’ve been and where you should be spending your time.

- **Help anaylze data.** If you’ve located several different records related to an ancestor’s marriage, how can you really analyze all the information and come to a conclusion if you can’t see the details all at once? A research log lets you sort by fields or column headings and also search for specific keywords so you can easily analyze results.
What To Include in a Genealogy Research Log

Here are some data points that you should consider tracking on a research log or any method you use for your genealogy research:

**Important**

- **Date**: Enter the date you located the record. Not only will this show the evolution of your research process, but the information can be important for source citations. In addition, you can tell if a new record set available in-person or online was even available when you were researching a specific person or topic.

- **Proof Point**: What fact are you attempting to prove? A relationship between two people? A birth date and location? Use a research goal from the To Do list tab and make it a proof point. A fact may have two, five or even twenty different line items representing different records that prove or disprove the proof point.

- **Record Name**: Each record should have a common yet distinct name, such as “Death Certificate for John Leehive.” For records that might have several iterations or versions such as an obituary in different newspapers, add qualifiers such as “Obituary of John Leehive, New York Times.”

- **Repository**: Identify where the record is physically located. For online records, you decide if you want to list the website, such as Ancestry.com, or drill-down to the actual originating repository such as NARA.

- **Record Type**: This is really a “field of convenience” since it simply gives you an easy way to sort and extract entries and group them by a category. Think “death record,” “marriage record,” etc.

- **Transcript Extract**: This can be a time consuming entry especially if you are working with a physical record. For online records, many times the item is already transcribed – simply copy and paste the text.

- **Analysis**: For me, this is where I take notes, formulate theories and really do my analytical work. Often I’ll enter comments or questions to myself such as “Which silk factory did John Vincent Slattery work at?” or statements such as “Proves Margaret Leehive was the daughter of John Leehive.”

- **Link**: Indispensable for online research since it saves time when having to go back to a record. Granted, URLs can change (that is why the source citation will always serve you as the best way to locate a record), but having a clickable link means not having to remember how you found the record.

**Optional**

- **Record Number**: An internal numbering system to reference entries in your research log. Use a simple number format or perhaps a surname + number format such as Slattery01.

- **Source Citation**: While we can argue whether or not this should be an optional field, this is where you build your source citation. Stick to the basics such as the
name of the record, the repository, date found, etc. The goal is to make it easier to find the record later on, especially if the record is located online and the URL has changed.

- **Proven?**: This is what I call my “thumbs up, thumbs down” or “plus or minus” column. Basically I use one word like “positive” or “negative” or a phrase like “proves theory” or “disproves theory.” Doing so is also important since certain theories can only be proven through negative evidence.

- **Image Name**: Enter the file name of a saved record image or photograph. Why? Most computer operating systems make it easy to search your hard drive contents so all you have to do is copy the text and paste it into your computer’s Search field to find the file.

**Evidence Evaluation Fields**
The following fields can be used when working with The Board for Certification of Genealogists’ *Skillbuilding: Guidelines for Evaluating Genealogical Resources* ([http://www.bcgcertification.org/skillbuilders/skbld085.html](http://www.bcgcertification.org/skillbuilders/skbld085.html)) by Linda Geiger. They offer an excellent way to help analyze research data.

- **Source Type**: A source is **Original** if it is the first written statement, photograph, or recording of an event. Subsequent copies are **Derivative** and may be reproduced by hand, machine, camera or scanner; they may be reproduced on paper, in microform, as photographs or digital images, or in any other medium that records the image whether transcribed by hand or technology.

- **Clarity**: Use **Clear** if the information can easily be read. Use **Marginal** if information is not clear, is partially obscured and researcher must "guess" at words or letters.

- **Information Type**: Use **Primary** if a piece of information is recorded by a knowledgeable eyewitness or participant in that event, or by an official whose duties require him or her to make an accurate record of the event when it occurs. Use **Secondary** if information is supplied by someone who was not at the event and may include errors caused by memory loss or influenced by other parties who may have a bias or be under emotional stress.

- **Evidence Type**: **Direct** evidence is any fact that is explicitly stated. **Indirect** evidence is inferred from one or more pieces of evidence within the record.

**Genealogy Research Log Templates**
Below are two versions of the same genealogy research log template to be used as examples in this document.

- **Excel Version – Genealogy Research Log**

- **Google Sheets Version – Genealogy Research Log**
  [http://www.geneabloggers.com/genresloggdrive](http://www.geneabloggers.com/genresloggdrive)
Creating a To Do List

Once you’ve gathered information about your family history from other family members, you likely have it recorded in different places: emails, written notes, letters, even completed Family Group Sheets.

Treat all of this data as unproven – the goal of using a genealogy research log is to create “proof points” for each piece of data. Example: birth date of John Vincent Slattery. A family group sheet may state the birth date as 27 July 1888 but what was the source of that data? Was it from a family story? From an email?

In the To Do List of the genealogy research log above, begin to transfer your various data points so that you have a list of research goals to track. Over time, you can mark them as Completed and enter the date completed. In addition, you may want to add a Notes field at the end stating the information given and its original unproven source.

Tracking Search Attempts

Some genealogists prefer to track all their search attempts. Now this may seem like quite a bit of work to enter the following when search on Ancestry.com:

First: John Vincent
Last: Slattery
Date: 1888 – exact
Location: Whiteport, Ulster, New York

But what if the results were different for the same search on FamilySearch? Or what if removing the middle name Vincent yielded better results? By tracking searches you can learn more about the searches that work best and those that don’t yield results.

Tracking a Record

After you have located a record, and saved the image or extracted information, “log” the record in the research log. Work from field to field and complete as much information as possible. For a sample record tracking in Excel using a World War I Draft Card for John Vincent SLATTERY, visit http://www.geneabloggers.com/jvswwisample.

Important: Some fields can be completed later, especially the Evidence Evaluation fields. However, the Source Citation field can be problematic to complete at a later date unless you save a link to the record in the Link field.
Modifying and Updating Your Genealogy Research Log

Once you feel comfortable using a genealogy research log, you may realize that there are other fields that you want to track OR some items that are not helpful to you. Example: if you don’t want to track searches, simply remove the Search Attempts tab (right-click and select Delete). Perhaps you use a supplemental evidence analysis program such as Clooz or Research Ties; it would then make sense to delete the Evidence Analysis columns.

In addition, the Citation Formats tab is an important resource and timesaver when creating source citations. You may have certain record sets that you commonly use in your research. Simply add a line item and create a source citation template in the Citation Formats tab. Also, remove line items for source citation formats that you do not use.

Important: When modifying your genealogy research log, make sure any changes are made to a master template and then use that for specific research projects.

Other Formats for Genealogy Research Logs

Spreadsheets are not to every researcher’s liking and since each researcher works differently, there are different formats and variations for genealogy research logs.

- **Genealogy Database Programs**: Software which lets you track your genealogy research. RootsMagic, with a free version available for download, has a Research Log report built in as a feature. It is organized using a series of questions such as “What were you trying to find?” and “What source did you check?” and “What were the results of your search?” Other programs such as Family Tree Maker and Legacy Family Tree have similar features.

- **Note Taking Programs**: Applications that allow you to create notebooks and capture web pages and documents include Evernote and Microsoft OneNote. Nice features include the ability to take a photo of a document and send it right to the application, and the ability to tag and label information.

- **Productivity Applications**: Similar to Microsoft Office, Google Drive is a free online productivity suite with Document and Spreadsheet components that can be used to produce a research log.

- **Reference Management Programs**: These programs manage bibliographic data and research materials, usually online. Zotero includes web browser integration and will generate source citations and Mendely offers similar features.

- **Forms**: There are also resources which offer a variety of free forms including research logs such as Ancestry.com’s Research Extract and Free Genealogy Forms and Charts forms.
Best Practices for Genealogy Research Tracking

- **Understand the “why” of using a research log.** If you are using a research log only because other researchers are doing so, then you’re wasting your time. Understand the benefits of tracking your research journey on paper, in a digital document, or using an online application. You’ll have a better appreciation for the research log and the research process.

- **Select a format that you will use.** There’s no sense in taking the “square peg, round hole” approach and using a format such as an Excel spreadsheet if you don’t like using spreadsheets. You’ll only frustrate yourself and abandon all ideas of using any research log. Try different types and stick with what works for you.

- **Spend time setting up headings or categories.** When taking the spreadsheet approach which relies upon column headings, take time to consider which headings to use. And don’t be afraid to add or remove headings over time. It is only through constant use of the research log that you’ll determine the best headings for your research process.

- **Shoot for a “one pass” goal.** When you find a record or piece of information, note all the information as if you might never find that item again. This means noting the date you found it, location, type of record, etc. You’re only kidding yourself if you say, “Oh, I’ll come back to that later.” Later is often “never” or a time when you need the information right away and it isn’t available.

- **Maintaining a research log is a discipline.** A discipline is created through hard work, practice and repetition until it becomes habit. Realize that you’ll make mistakes the first few entries. Then you’ll become better at entering information accurately and quickly.

- **Source citations matter – take a shortcut!** Sounds like heresy, doesn’t it? “There are no shortcuts in source citations,” someone once told me. Nonsense. Create a cheat sheet for yourself – a document or a spreadsheet tab where you keep your most commonly used source citation formats. Then copy the format to your record entry and fill in the blanks. Easy peasy!