



## **Step 4: Tracking Research and Conducting Research**

The Genealogy Do-Over

<https://www.genealogydoover.com>

After Step Three, this is where, as genealogists, we “come home” to our favorite place: **research**. We get to take the information from our interviews and family group sheets and use it to find evidence to prove or disprove relationships and what I call “data points.”

Do you remember returning home for the first time after a long absence, such as your first semester of college or on your first military leave? Things changed, didn't they? Maybe your mother converted your room into a sewing room or your father claimed it as his den or “man cave?” I hate to tell you this . . . but with The Genealogy Do-Over, coming back to research will never be the same. Now you will be asked to set up a **To Do List** (your research goals), track your research, and more. There will be data to enter, items to transcribe and eventually, thinking and analysis required!

This is how genealogy success is made. Most of you are part of The Genealogy Do-Over to change old research habits and to improve skills. What was is gone; long live the new research methods. And long live success!

Besides, haven't you heard that you can never go home again?

### **TRACKING RESEARCH**

One of the main issues I had with my OLD genealogy research method: I would not track data when I found it. I would simply enter it in my database, perhaps mark it as UNSOURCED and then tell myself I would clean it up later.

**NO MORE!** With The Genealogy Do-Over, you track your goals, what you want to prove and then – after collecting as much related evidence as possible – evaluate that evidence and prove a fact. Once proven, then it is entered into a genealogy database software program or an online tree. Solid information with solid source citations make for solid trees that don't fall over.

### **Genealogy Research Log**

I have a genealogy research log that I use and that I recommend. It is a multi-sheet Excel file that can be imported into Google Drive as well as Numbers for Mac users. Past participants in The Genealogy Do-Over have stated that the file converts cleanly in many programs, even Open Office.

- **Excel Version – Genealogy Research Log**  
<https://genealogybargains.com/genreslog>

Some genealogists have asked if I could create a similar research log in another program such as Microsoft Word since some people find spreadsheets difficult to use. Due to the nature of tracking information and the need for a very wide table, Word just doesn't lend itself to a good genealogy research log format. Another option is to place all the fields in a “fillable form;” however, you would then have to create a new document for each record located. And then, how can you quickly see what you've found? Open and close a series of documents?

What you decide to use for a genealogy research log is up to you. If you've been opposed to using spreadsheets in the past, I just ask you to give the research log above a try.

## CONDUCTING RESEARCH

Once you have your research goals and a way to track them, then you are ready to research. This means both offline research at archives, libraries and repositories as well as online using various free and fee-based resources.

I continue to track down documents and evidence for each proof point on my To Do List. Right now, the focus is on gathering the information, making sure I can remember where it came from and working on source citations and evidence evaluation at a later time.

### STEP 4 TO DO LIST – FULL DO-OVER PARTICIPANTS

- **Tracking Research:** Review the research log above including all the worksheet tabs. Decide if you want to use this research log format or create your own. If using your own, include the fields you think are most important to track when doing genealogy research.
- **Conducting Research:** Using whatever tracking form you've selected, make sure you enter your research goals. Then start your research (with yourself and your birth date, birth location, etc.) and for each record found, make sure each one is entered and tracked. Copy a link to the record if it is online – you will want an easy way of returning to the record without having to do a search again. Make sure you extract as much information as possible from the record.

### STEP 4 TO DO LIST – REVIEW OR “GO-OVER” PARTICIPANTS

- **Tracking Research:** If you have never used a research log before, consider using the format above or creating your own. Another option is to see if your preferred genealogy database software has a way of tracking research; some have a To Do List option, others have something similar to a Research Log.
- **Conducting Research:** With your current research, start with yourself. Check to see that all information is accurate, based on your interviews and family group sheets, and make sure each point of data can be tied to at least one record. If something is missing a corresponding record – like a birth location – then mark it as “unsourced” and add it to your To Do List for further research.