

EFFECTIVE RESEARCH STRATEGIES

January 2024 Live Genealogy TV Academy Classroom Presentation.

There were several requests to follow along with me as a go through a real research process. In an effort to not be boring, I am recreating a five-day research project, hoping to accomplish it within an hour. Keep in mind during the Zoom call, I am copying the results from my written progress sheet and source citations into my Research Notes (for this ancestor Benjamin Garrett) for the sake of saving time. Listed below are some ideas of tools and strategies applied in the video presentation.

We are using Ancestry and FamilySearch in this lesson. We may visit a state archive if time permits.

Goals for This Lesson:

Five Research Strategies

1. Searching from **Hints** and **Ancestor Profile** (easy)
2. **Planning** & List **What is Missing** (just smart research)
3. **Searching** What is Missing on Ancestry (advanced tricks)
4. **Finding the same on FamilySearch** (advanced tricks)
5. **Where to Find the Records** (easy)
6. Bonus: **Next Steps** (easy)
7. Bonus: Learning the **Research Notes Process**
8. Bonus: **Source Citations** as you go.

Strategic Process

- One Ancestor or Couple
- Research Question
- Organize What You Have
- Research Notes
- Plan
- Search
- Resolve
- Conclude



Researching Benjamin Garrett (1776-1865)

During this demonstration we are researching Benjamin Garrett. This document is not about him, but the strategies used to find him in the records.

Before Starting

As you begin, know the area you are researching both in a timeline and geographically. Google is your best friend to learn when counties were formed and from what county they were created. Also, Google maps is an excellent source to understand the distance between two places. Together (county formation and maps) help you to confirm or deny if the record you are looking at is your ancestor. Is it likely or not so likely to be your ancestor?

Know Your Research Area Geographically

Examples:

18 January 1842 Wayne County, West Virginia was established on January 18, 1842, from part of Cabell County.

20 June 1863 - West Virginia becomes a state from Virginia.

Create Research Notes

Create a Template or Master Document to use over and over again. Then **“save as”** a new document **for your ancestor**.

“1 GARRETT Benjamin - Research Notes”

In Your Genealogy Archives (Digital files on your computer)

- Create a **Surname folder** (GARRETT)
- Create the **Ancestor folder** (GARRETT Benjamin)
- **Add documents** using the **same naming conventions**. Example: GARRETT Benjamin – 1865 Will and Probate.

Evaluate

What do you know/have already? Add to your Research Notes.

- Real Original Sources?
- Real Original Documents?
- Just some unknown data collection or copy of an original?
- Add Source citations

Is there anything that jumps out at you from here? Do dates make sense? Are people not lining up with more recent records?

Children

You likely have acquired information from the children if you are working backwards as you should be. Briefly evaluate those records again. You may already have records that pertain to your target ancestor you are researching.

Search vs. Research

Searching is using the search buttons from the ancestor's profile and hints. However, REsearch is the process of creating a targeted research plan, then researching the plan.

Start a Research Plan

Start a list of things to look for as you search and research. This can be done on a separate document or **in your research notes**. I use my Research Notes in most cases and **color the plan in red**. This way it jumps out at me in my notes as unfinished research. Once I find what I am looking for, I update my Research Notes with what I found and remove the red font.

If I am going “on location” to a library or archive, I will prepare a research plan or list of things that I have prepared in advance of the trip. This includes what I am looking for and call numbers found on the library/archive website.

Profile Hints

For the chosen ancestor, use the hints tab first, and work through those to evaluate if they are or are not your ancestor.

- Add to Research Notes
- Add Source Citations for each record found.

Not Sure About a Record?

If you are not sure about a record, there are a couple of things you can do temporarily until you conduct further research to determine if the record is your ancestor or not.

- First is to download the record into a temporary file and label and source it properly.
- Second is to copy the hyperlink and add it to your research notes or a separate document as something that needs further investigation. Mark them with **red font** to know this is something you need to come back to when working your research plan.

Search from Profile

- Pay attention to filters when researching anywhere. It is easy to accidentally filter more than needed.
- Search then refine filters
 - Add to notes and source

By now you may have a growing research plan based on what you have found.

Targeted Research



This is where you go from search to research. You have chased the hints and you searched from the ancestor's profile, now put your thinking cap on and **plan what you are missing** and **what is your next move**.

Here are the steps you need to go through for smarter targeted research.

Plan

Continue adding to your research plan. For me, this is in red font withing my research notes, so it is all in one place.

Specific Research for Each Missing Piece

This is where looking on the Ancestry Card Catalog, FamilySearch records search, FamilySearch Wiki, State Archives, County Online Records, and possibly visiting the locations comes in.

Ancestry Card Catalog Search Tricks

1. **Search by Place, then Era, then Record Type.** This will show you if they even have the records. Drill only to the state level at first. You do not want to miss those state records.
2. **AutoFill** your ancestor. As you start to type the name into the search fields, you will see your ancestor pop up (if he is already in your tree). You can then select them and prepopulate the fields. This can be a good time saver but can also cause the search to filter out too many records.
 - a. **Search using AutoFill and without.**
 - b. **Try AutoFill and X out** (remove) the **unnecessary people and data.**
3. Try **searching Manually** filling in exactly what you are looking for and no more.
4. **Try searching a place without a name.**
5. **Try searching only the surname.** Then drill into a record that matches the location regardless of if it is your ancestor or not, just to get into the images... and then read through the images. This can be especially useful for hard-to-find ancestors.

Where to Find the Records? Wiki's

If you ever need to know where to find the records, my first stop is the [FamilySearch Wiki](#) (free) . [Cindi's List](#) (free) is a good resource and [MyHeritage](#) (paid) just started a [wiki](#) as well. WikiTree (free) is another resource of sources for your ancestor.

Research – Five Strategies Used in This Lesson

- 1) FamilySearch Wiki for where to find the records
- 2) Ancestry Card Catalog in Various Ways
- 3) FamilySearch Search Records
- 4) Google Search, Google Maps, Google Books
- 5) Books at HathiTrust.org