

Genealogy Workflow

[Link to Genealogy Workflow Video](#)

Genealogy is exciting and we want to jump right in and learn all we can as quickly as possible. Whoa! Slowdown Speed Racer. What if you are happily researching and you make a mistake but didn't know it. You continue to work for months or years only to find out that you have one branch of your tree that is not your ancestors.

In this episode and handout, I will share my top ten tips, using my proven workflow, that makes research fun, easy and accurate.


Note: This is my workflow. *You do you!* Do what works for you, but I bet you find a few tips here that helps you rethink how you research.

Step 1 - Your Physical Workspace

Use Two or More Computer Screens


If you can afford to do so, get a second computer screen. This way you can have one computer screen with your tree or target ancestors' profile on it and use the other for researching various places.

How to Set Up a Second Computer Screen – Windows

- 1) Click on the Windows icon in the lower left of your computer. 
- 2) Click System (Display, sound, notifications, power).
- 3) Scroll down under "Multiple Displays," and choose Extend My Desktop.
- 4) Scroll back up to the top where it says Display.
 - a. Arrange the monitors so that when you move your mouse from left to right, they cross the screens correctly. See the next page for the diagram.
 - b. If they do not, click one of the monitors in the "Rearrange your displays" area and swap their positions.

Scale and layout

Change the size of text, apps, and other items

100% (Recommended) 

[Advanced scaling settings](#)

Display resolution

1920 × 1080 (Recommended) 

Display orientation

Landscape 

Duplicate desktop on 1 and 2

Duplicate desktop on 1 and 3

Extend desktop to this display

Disconnect this display

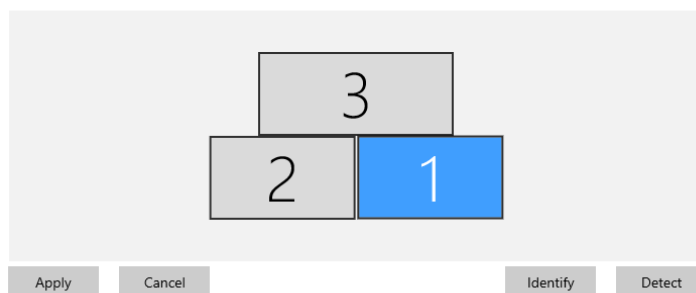


- c. You can also click Identify to see which monitor is which.

Display

Rearrange your displays

Select a display below to change the settings for it. Press and hold (or select) a display, then drag to rearrange it.



Be sure to nest the monitors close together for the best experience. In the screen shot above, I use three monitors. The #3 monitor is an extra wide monitor, which is why it looks that way.

Choose Your Primary Monitor

- 1) Click and highlight the monitor you want to use as your primary monitor. In this example above, #1 will be set as the primary.
- 2) Scroll down to Multiple Displays and check the box that says, "Make this my main display."
- 3) To change it, simply click a different monitor and click the "Make this my main display" again.

Multiple displays

Multiple displays

Extend desktop to this display

Make this my main display

Alternatively, if you cannot have more than one monitor, you can open two windows and have them side-by-side.

Desk and Filing

- Keep your desk neat and organized so you can focus on your current research question.
- Keep things filed where you can find them.
- Consider a project box. Use one project box at a time. Work the problem to its completion and then refile everything properly.
- Notebooks by Surname.
- Filing cabinets (if necessary)

As you keep your files, consider who is going to inherit your files when you are gone. Keeping them neat and organized (with a donation or inheritance plan for your records), will reduce the burden on your family after you die.

Have ONE Primary "go to" Family Tree, Online and or Software

This is important. I know many people who have multiple trees for various reasons. I use one primary tree... and it is on Ancestry. Why? Because Ancestry has more records than any other service out there. Additionally, they have more DNA connections than anyone, it's fishing in a bigger pond.

Having one tree helps tie records and DNA connections to one place. Trying to keep multiple trees updated is a lot of work and a huge waste of time.

You *do* want to have trees in as many places as possible, but I only update those “other” trees for specific lines I am focused on.

Private vs. Public Trees

Keeping a private tree can be helpful when “playing in the sandbox” experimenting with a hypothesis. Also, the Genealogy Code of Ethics says, “do no harm.” Therefore, if the information you are putting in your public tree is hurtful to others, you might want to keep your tree private.

Keep in mind that just because your tree is private, does not mean that others cannot find it. At Ancestry, for example, you can have a private tree, but when searching, others can see the name of your tree and in some DNA search results, it may show a Common Ancestor between you and the person

Private Tree
This setting allows you to keep your tree "private" so that other users cannot view the contents of your tree.

What does "private" mean?
Limited information about deceased individuals in your tree (name, birth year, and birthplace) will still appear in Ancestry search results. However, no one can view your actual tree without your permission. If another member wants to view your tree, they can contact you anonymously through our Connection Service to request more information. Keep in mind that these individuals may also have helpful information to share with you.

Also prevent your tree from being found in searches.
Note: Although your privacy setting will change immediately to public or private, it usually takes about a month for this update to be reflected in the search index.

Save Changes

with the private tree. You will not, however, be able to drill into that tree without the tree owner’s permission.

Using Private Unsearchable Trees

If you want to have your tree totally private, make it also “unsearchable.”

Trees are not private on services that use worldwide collaborative trees like FamilySearch.org and WikiTree.com.

Steps to making a tree private and or unsearchable at Ancestry.

- 1) Login to your Ancestry account.
- 2) Click the Tree tab at the top of the screen.
- 3) Drop down to “Create & Manage Trees.”
- 4) Look for the tree you wish to modify and to the right click Tree Settings.
- 5) At the top of the screen look for Privacy Settings, click that.
- 6) Scroll down and click the radio button that says Private Tree.
- 7) If you want to also make it unsearchable, click the “Also prevent your tree from being found in searches.”
- 8) REMEMBER TO SAVE CHANGES!

File Everything Digitally Using the Same Methods.

Filing nomenclature

I use the same nomenclature for every file, every folder, every subfolder. In my files it looks like this
 “SURNAME, First Middle – Date of Item, Item, Current Location.”

SURNAME [Folder with all ancestor folders underneath with the same surname]

SURNAME First Middle [Folder]

SURNAME, First Middle – Date of Item, Item, Current Location [Document]

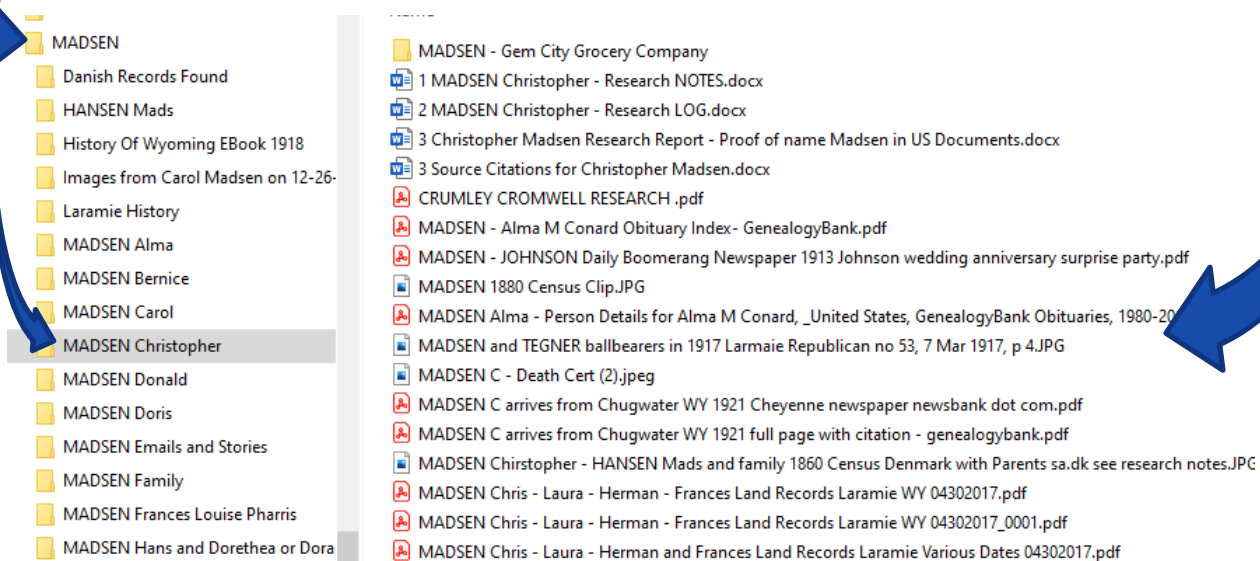
SURNAME, First Middle – Date of Item, Item, Current Location [Document]

SURNAME First Middle [Folder]

SURNAME, First Middle – Date of Item, Item, Current Location [Document]

SURNAME, First Middle – Date of Item, Item, Current Location [Document]

SURNAME, First Middle – Date of Item, Item, Current Location [Document]



For more information on my method for filing just about anything, see this episode called [Good Filing Habits from the Start](#).

Research Workflow - Good Research Habits from the Start

Consistency is Key!

No matter what you do for research habits, be consistent. It is called a habit for a reason.

200 Year Rule

Use my “200 Year Rule” when thinking about your written research and how you file your documents. 200 years from now, can someone easily navigate your records without a finding aid. Can they go right to what they are looking for or will they need to wade through a ton of information?

If you have a complicated numbering system or your own coding system, even if you have a finding aid to show someone how to navigate the system... What if the finding aid is separated from the rest of the documents 200 years from now. Can someone easily figure out how to find their ancestors in your papers?

Consider using my filing nomenclature. It is so easy; no finding aid is needed.

Hyperlinks

When using hyperlinks, they die over time. Consider using the actual location of the original records (in your research notes) instead of a hyperlink. Hyperlinks are good for your personal reference for the next few years, but hyperlinks will likely not be around 200 years from now.

See the sections on Research Notes and Plans for more about good research habits.

Use Methodical Research Methods

My daughter says I am hyper-focused all the time. This is a good thing when doing genealogy.

Simplified Method the Pros Use

- **Research Question**
- **Research Plan**
- **Research**
- **Resolve Conflicts**
- **Conclusion**

Figure out what your **Research Question** (or problem) is. What is it you want to know?

From there create a **Research Plan** (where you think you should look). Use FamilySearch Wiki to help in the area you are researching.

Then follow the plan and conduct the **Research**. Follow the plan. Often you will think of new areas to look and add them to your **Research Plan**. This is fine if it is focused on the **Research Question**.

Along the way you will discover conflicts. Some will be small like a variation in your ancestors' name, and other may be larger, like two different places of birth. When this happens, you need to do your best to **Resolve the Conflict**. Write down what you believe to be the truth and why. What evidence is stronger than another.

In my opinion, your **Research Notes are the most important document in your files**. Keep one Research Notes document per ancestor.

My method for keeping good Research Notes is not new, but I do have specific details that must be in my notes.

For me, **Research Notes are *only* for documents and evidence found**. Research work plans or evidence *not* found, is left in the Research Plans or Research Logs.

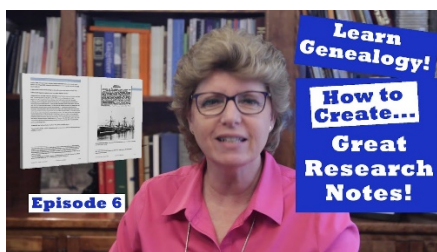
The reason I only keep what is found in the Research Notes, is because it is my **“go to” document of all evidence in chronological order** so that I can see exactly where my ancestor was (or at least his/her last known location) at any point in time. This is extremely helpful when researching and reviewing your Research Notes, as your eyes can jump right to where you need to chronologically without the need to read the entire document.

It can (at your choosing) include your thoughts and hypothesis (in chronological order, when applicable). For example, if you suspect someone was born between two dates, you can start your paragraph with the range of dates and what evidence leads you to that conclusion.

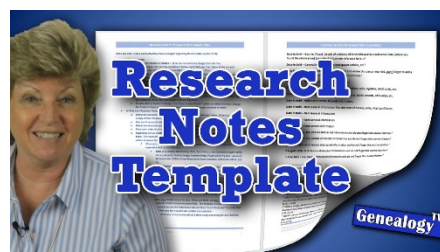
Save all references, source citations, and hyperlinks in the footnotes. This will save you from reading all the petty details and will ultimately save you time.

For more information about Research Notes, see these must-see videos.

[How to Create Great Research Notes](#)



[How to Create a Research Notes Template](#)



Keeping research notes for each ancestor, as you work on them, will change your life. Yes it might slow you down a bit, but if you are stuck, creating a set of Research Notes in chronological order, will help you see details you never noticed before.

Reasonably Exhaustive Research

Now that your house is in order (your physical workspace, your filing methods, and how to keep good research notes, now it is time for quality research.

This is part of turning over every rock, professional genealogist call this “Reasonably Exhaustive Research.”

F.A.N. Club Strategy

The F.A.N. was a term coined by Elizabeth Shown Mills. It means Friends, Associates, and Neighbors. Also known as Cluster Research, the F.A.N. club strategy is to research not only your direct ancestors and their family members, but also the Friends, Associates, and Neighbors of that ancestor to understand how these people interacted and get a sense of community. **Researching the lives of the F.A.N. Club, will help you to confirm that the record you are looking at is your ancestor, when these same people show up in other records.**

Learn more about the F.A.N. Club strategies.

[What is FAN Club Research?](#)

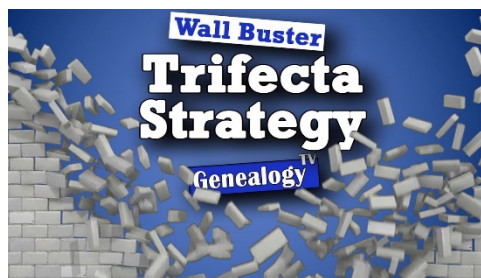


Use the Trifecta Strategy

The Trifecta Strategy I developed is simple yet powerful. It uses the power of 3^3 . Three to the third power equals 27 ($3 \times 3 \times 3 = 27$).

The idea is to search on **three different services** (Ancestry, FamilySearch, + one of your choice) in **three different ways** (By Name Search, By Location, and Closest FAN Club Member). By doing so, you will likely find more records than ever before. This is a great “brick wall” strategy (getting unstuck). I often will find more than 27 new records I did not have before I started.

For more information about the Trifecta Strategy, see [Ancestry and FamilySearch, FindMyPast or MyHeritage: Family Tree Trifecta Strategy](#)



Use DNA

Believe it or not, one of the last things I typically look at is DNA. I want to have all my ducks in a row, I want to know all I can in records and evidence before I look at DNA. I do this because when searching other people’s trees, I do not want to guess if what I am looking at in another person’s tree is a match or not. If I have done “Reasonably Exhaustive Research” in traditional genealogy records research, then when I go to look at other peoples trees, I know if what I’m looking at is a match or not.

Looking at Member Trees... is the very last step.

The reason this is *the* last step is because I want to find all the records and all the relevant DNA matches I can on my own, before seeing what others have. Often, “member trees” will have all the same records I have. By the time I finish my “Reasonably Exhaustive Research,” I have collected more than any of them. I am not bragging about this, it is just a pattern I see, but there is a reason for this. The algorithms will deliver you hints for records found in other member trees in addition to what you discover on your own from the research process.



At this point, I have hard evidence to support my connections when reviewing member trees. Frequently I find, they have no evidence to support their connections. When I see this, it is often because they just imported the data from another tree assuming it must be correct. This is how we end up with many members piling on to unsupported connections.

By saving this for the last step, I have already scrutinized the documents and have created my own set of data.

The big reason to look at other member trees, is to look for records you did not find on your own. Compare what you have and their data to see if it matches what you have. This is the power of collaboration with others who are working on the same lines.

After you have found everything you can, now is the time to reach out to other members to see if there is more to the family story that might not be online.

More about why members might not respond. See this episode.

[3 Reasons Why People Don't Respond to Your Messages & How to Find Living Family](#)



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