

Research 101

Tools and Techniques for Beginning Genealogists

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Learning an effective research process and analysis skills while researching less distant ancestors will lead to successful results. Early success will build skills and confidence to begin tackling more difficult tasks.

Getting Started

The instruction during this session assumes that participants have created a *FamilySearch* login and connected themselves to the *FamilySearch* tree. If you have not yet taken these steps, use the following resources to learn how:

FamilySearch, “How do I create a free FamilySearch Account?” help center article, 20 April 2020, (<https://www.familysearch.org/en/help/helpcenter/article/how-do-i-create-a-free-familysearch-account>).

Leslie Albrecht Huber, “How to Start a Family Tree on FamilySearch: Adding the First Four Generations,” blog post, 12 June 2019, *FamilySearch* (<https://www.familysearch.org/en/blog/how-to-start-a-family-tree>).

The *Family History Guide* has great step-by-step lessons to help *FamilySearch* users learn more about navigating *FamilySearch* and the Family Tree:

The Family History Guide, FamilySearch, Project 1: Family Tree, Goal 1: Signin and Navigation (<https://thefhguide.com/project-1-family-tree.html>).

Mindsets that can hinder beginning genealogists in their research:

- Following the instinct to look at a fan chart and jump to the first empty spot on the chart, wanting to solve a long-standing mystery. These mysteries are known in the genealogy world as “brick walls.”
- Jumping from one person to the next without ever performing any real research.
- Suffering from analysis paralysis, worrying about incorrectly identifying a family member and getting something wrong.

The Genealogy Research Process

Genealogy research is founded on basic principles that hold true whether you are a novice or an expert. Following six simple steps will help you ask and answer questions about your ancestors and their extended families. Increasing familiarity with historical records, a better understanding of source analysis, and advanced techniques will come as beginners practice these steps over and over, adding to their knowledge through further experience and education along the way.

You can remember the genealogy research process by thinking about the word **F-A-M-I-L-Y**.

*Visit <https://alicechilds.com/Research101> for real-time demos of this process.

F ind a Person to Research

Don't start with a "brick wall" You will want to choose someone who will be easier to research. Once you get hang of the process you can start challenging yourself with more difficult questions. Find someone who:

- Was born after 1850
- Lived in the United States or another country with whose language you are familiar

Tools and Techniques

- *FamilySearch Hints* – If you have opted in to receive emails from *FamilySearch*, you may receive hints about ancestors. Be sure to open those emails. Record hints also appear on the home page of *FamilySearch* after logging in. Curiosity about these individuals can often lead to missing family members.
- *Descendancy View* – You can view your family tree in several different ways at *FamilySearch*. Begin by looking at the **Fan Chart** view, in **Birth Place** mode. Choose someone who was born about 1800 in the United States, or whose children were born in the United States. Put them in the middle of the fan chart by hovering over their name and clicking on the small gray fan that appears below their name. Switch to **Descendancy** view.
 - Change the number of generations to "4" by clicking the settings box at the top right of the screen and selecting **Generations: 4**.
 - Scroll down the page, looking for family members who have a small horizontal line by their name (rather than an arrow). This line means they don't yet have a spouse or children added to the tree. This would be a great person to research.
 - The boxes along the right side of the screen can also help, showing you family members with research suggestions, record hints, and data problems.

Your Task

Once you have identified a person to research, write down their name and PID number. Now formulate and write down a question about that person. Effective genealogical research always begins with a question. Without a question to focus our work, we may get sidetracked and end up clicking around on the tree, jumping from one person to the next without ever doing any real research. Research questions can involve relationships or events in our ancestors' lives. Some examples include:

- Who were the parents?
- Who was the spouse?
- What was the maiden name?
- Who were the children?
- When did they die?
- Where were they born?

Analyze What is Already Known About That Family Member

Tools and Techniques

- Navigate to the person's *FamilySearch* profile page.
- Open the **Sources** tab and look at all sources attached to that individual. Open each source. Where possible, view the image of the original document to glean additional details.
- Write down key information.
 - Birth, marriage, and death dates
 - Names of parents, siblings, spouses, children

Your Task

At this point, you may have already found the answer to your initial research question. If so, that is great! Make sure the information from every source has been added to your ancestor's profile page. Now, ask yourself, "What is still missing?" If needed, write down a new research question and continue to the next step.

Map and Time Line

To ensure that you are finding records for the correct ancestor, you need to identify specific things about that person. Where did they live? When did they live there? *FamilySearch* has a map and timeline feature that will help you with this.

Tools and Techniques

- Click **Time Line** on your family member's profile page.

- Change the **Time Line** settings to show vital events and relationships. Note any important events that are missing on the **Time Line**.
- Look at the events on the map. Do they make sense? If the family moved, do they bounce back and forth between locations across time, or is there steady progress in one direction?
- Write down where the family lived, then visit the *FamilySearch* Research Wiki and learn about county formation or parish information. Learn what the parent county was or what counties or parishes neighbor your ancestor's hometown.
https://www.familysearch.org/en/wiki/Main_Page

I nstant Records

You have now chosen an ancestor to research, examined the sources that are already attached to your ancestor's profile at *FamilySearch*, and examined the Time Line and Maps features on their profile to learn where and when your ancestor lived. Next you will start looking for additional records that will help answer your research question. *FamilySearch* provides what I like to think of as “Instant Records” to help you. There are two ways to find instant records:

Tools and Techniques

- Computer algorithms use the dates, places, and relationships associated with your ancestor to find additional records that might pertain to that ancestor. These records are then provided to users in the form of **Record Hints**. Our job as humans is to analyze those records based on the information we have learned about our ancestor and determined if the computer has found a record that does belong to our ancestor. If there are record hints for an ancestor, they will appear in the **Research Help** section on right-hand side of the **Details** page of an ancestor's profile.
- Another tool is under **Search Records**, which appears just below the **Research Help** section. Clicking on the *FamilySearch* icon will auto-populate a general search of all the records held at *FamilySearch*. Sometimes you will have success with this type of search. Often, you will need to search specific collections rather than performing a broad search of the entire database to have success.

Your Task

- Evaluate all record hints for your chosen ancestor. Be sure to pay attention to names, dates, and places. Ensure that these items match at least closely enough to be feasible before accepting the hint and attaching the record to your ancestor's profile.
- Perform a broad record search by clicking on the *FamilySearch* icon under **Search Records**. Attach any records discovered for your ancestor to their profile.
 - As you look at the list of records, look at names, dates, and relationships to determine whether a record might pertain to your ancestor.
 - Tip: Filter the results by record type. If looking for a birth date, filter by “Birth.” If looking for marriage information, filter by “Marriage,” etc.

- Re-evaluate your research question. Has it already been answered? If so, is there another question about that ancestor you would like to answer?

L

ook for Additional Records

The next step in the research process will be to pinpoint additional records that may have been created for your ancestor. Instead of performing a broad search of the entire database, you will now focus in on specific records that may help answer your research question.

Tools and Techniques

- The *FamilySearch* Research Wiki has a tool called a **Record Finder** associated with every country and state page. Access the record finder by going to the **Search** tab at the top of any page on *FamilySearch*. Click to access the drop-down list and choose the bottom option: **Research Wiki**. The Research Wiki is like *Wikipedia* for genealogy, and the pages are created and maintained by people with expertise in specific areas of research. Use the map to navigate to the geographic region for your ancestor. Click the continent, then the country, then the state or province.
 - In a box on the right-hand side of the page, look for **Record Finder**. Clicking on the link will lead to tables that show what type of record will provide the answers to various types of research questions in the location where your ancestor lived. For example, to find a death date, you will look for vital records first, then obituaries, etc. Click the record type to access a list of record collections of that type that are available for the area where your ancestor lived.
- Another resource for finding pertinent records is the *FamilySearch* catalog. Access this by returning to the **Search** tab at the top of any page on *FamilySearch* and choosing **Catalog**. In the place field, type the state or province of interest, then use the “Places Within” links at the top of the page to drill down to the state or county level. You will see a list of record types for each locality. Click on one type to open a list of record collections, books, etc. held by *FamilySearch*. Many of these resources have been digitized and can be accessed from home.

Your Task

- Access the record finder and choose two or three record collections that you think will be most likely to answer your research question. If needed, access the *FamilySearch* catalog and choose two or three more.
 - It is important to limit the initial search to just a handful of records. These should be the records you feel are most likely to answer the research question. If the answer is not discovered in these records, you can always return to the lists and make another list of records to search.
 - Record each collection you searched in a research log, even if the search did not produce a record about your ancestor. This will prevent you from repeatedly searching the same collections if some time elapses between the time you create the list and the time when you are able to perform the searches.

- Analyze records that appear to belong to your ancestor. Do the names, dates, and places match, or are they close enough to be realistic?
- If you find a record pertaining to your ancestor, attach the record to their profile using the **Attach to Family Tree** button you will see when viewing the record.
- Continue seeking, accessing, and evaluating records until you have answered your research question.

Y ou Did It!

You have now completed the steps to research an ancestor. It's time to celebrate your accomplishment! Go back to the ancestor's profile page and click the **Go to New Discovery Page** in the top right-hand corner. You will be able to see a life summary that was automatically generated based on the records you have attached to your ancestor. You will also see the person's family members, a list of sources, a family timeline, world events that took place during your ancestor's life, and some suggested activities to help you learn more about their heritage. Share your success with family members and help generate excitement about genealogy research by using the social media buttons at the bottom of the page.

If unanswered questions about your ancestor remain, return to the beginning and repeat this process. If not, choose another ancestor and work through the process with them. The more you repeat the process, the more comfortable you will feel. Before long you will find yourself tackling more complex research questions with confidence!

For Further Reading

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