

Techniques and Tools For Streamlining Your Research

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I General Strategies for Streamlining

A. Organize Thoroughly

1. Chart all information
2. Create Research Logs
3. Organize Folders
 - Pedigree Chart = Road Map
 - Family Group Sheets
 - Research Logs
 - Timelines

B. Background Research

1. Research Outlines
 - a.. Historical outlines
 - b. Source info by topic or category
 - Start with Record Selection Table - 2 ways
 - See U.S. Research Outline at www.FamilySearch.org Original
 - See U.S. at https://wiki.familysearch.org/en/United_States - New
2. “How To” books and websites for specific record type or location

C. Survey Source Availability

1. Family Search www.familysearch.org Old vs. New versions
 - a. Search Databases
 - IGI - Extracted entries give film numbers for original sources - Old
 - PRF - Compiled information, Submitter contact information - Old
 - FamilySearch.org – Historical Records New/ Record Search Pilot - Old
 - b. Family History Library Catalog [FHLC] Original/Library Catalog
 - Surnames
 - Locations - Be sure to use national, state, city/town levels. The “new” version makes this more difficult
2. USGenWeb www.usgenweb.org
 - Web pages for all 50 states
 - Web pages for every county in the US
3. Linkpendium at www.Linkpendium.com Go to state, county and topical links
4. Ancestry at www.Ancestry.com
 - Census - establish family county location
 - Vital records indexes
 - Then use other record indexes - military, etc.

II Streamlining Internet Research

A. Word Processor - WordPerfect, Word

1. Have program running all the time while you research
2. Upon locating data:
 - Copy and paste data immediately
 - Record date of search
 - Copy and paste URL and any source information
 - Copy and paste specific data right to your PAF notes and sources

B. Organize Files and Folders

1. Include the date in your file names, i.e. xxxxxxxx_Mar2011
 - Certain databases are static and some will grow -- those that are growing will need to be rechecked periodically
 - Be specific about location or record involved
2. Various folder ideas:
 - Have a folder for each research project
 - Folder for each surname
 - Folder for each state
 - Folder for each location

III Streamlining Research Trips: Have a plan - know what you can do and where you can do it!

A. Use online library catalogs in advance:

- Use FHLC online to locate sources
- Use BYU FHL Website to know what is at BYU FHC, including FHL films and fiche [Google BYU HBLL and see the Family History link]

B. Use Resources of your FHC and/or home computer in advance:

- Research Outlines, BYU annotated version
- Research Guidance - Use this system for ideas
- Make print-outs of sources that will be used, for your files
- FHC Portal: Use pay databases free. Ancestry.com
- FHC Consultants
- Reference books

C. Use Resources of your local public library:

- Background research
- Reference books
- "How To" genealogy research books
- In house database subscriptions to pay sites, also institutional only databases
- Heritage Quest at home at no charge - Contact you local public library.

D. BYU- HBLL: Use the Blue Binders from Home

- BYU Library Catalog <http://www.lib.byu.edu/>

- Fantastic map collections
- Special Collections
- Periodicals
- Consultants, Librarians, Blue Binder
- Use in house databases and subscription databases

E. On to Family History Library:

- Now you will be doing only things that cannot be done elsewhere
- Consult with language and locality experts
- Make film copies
- Use books unavailable elsewhere

F. Interlibrary Loan for items unavailable locally. See <http://www.worldcat.org/>

IV. Tools For Streamlining Research

A. Research Logs/Research Calendars

B. Correspondence Logs

- Letters
- E-mail

C. Time Lines - Include Event, Name, Location, Date

D Individual Information Sheets - Biography Pages

E. Record Check Lists

- General Records
- Military
- Census

F. Record Extract Sheets

- General
- Census - Forms to replicate the headings of all years U.S. & British

G. Other - Whatever source you are using – is there a form for taking notes or can you make one that will streamline your work?

V. Mind Set For Streamlining you Research

A. Databases - Who made this database and why? Is it static or still growing?

- Use with care. Read the part about “how to” search.
- Do they truncate name field?
- Is there a description of the contents? Read it.
- Search features: Wild Cards? Search without a given name?

B. Books - same

V. Where Can I Obtain Charts and Forms?

A. Internet Freebies - Links to Free Charts, Forms and More :

- Treasure Maps Free Genealogy <http://amberskyline.com/treasuremaps/free-genealogy.html>
- ObituariesHelp.org http://www.obituarieshelp.org/genealogy_forms_downloads.html
- Family Search www.familysearch.org See Forms, Maps and Guides link on Home Page
New - Family Search Downloads or search for Census Forms etc., on FS Wiki home page.
- Easy Genealogy Forms <http://www.io.com/~jhaller/forms/forms.html> You can customize
- Free genealogy Charts and Forms - many links,
<http://www.genealogysearch.org/free/forms.html>
see Free Family History Forms - Mid-Continent Public library – Records Checklist
see Ruth Ann's - Free Genealogy Charts and Forms
- Baileys <http://www.cs.williams.edu/~bailey/genealogy/> Note Cemetery Tracking form
- Family Tree Magazine <http://www.familytreemagazine.com/forms/download.html>
Everything! Many innovative ideas. Bio.outline, Military Records Checklist, Deeds . . .
- Ancestor Search - Genealogy Free Resources
<http://www.searchforancestors.com/genealogyfreebies.html>
- Misbach <http://misbach.org/pdfcharts/> Pedigree and family group sheets
- Kindred Trails http://www.kindredtrails.com/free_genealogy_stuff.html
Links to other sources of free forms to print and/or down load
- Smart Draw <http://www.smartdraw.com/> Free Trial

B. Designing Your Own Forms -- It's Easier Than You Think

1. Printed Version

- Click on "Table" in your word processor and design one
- Chart can be vertical (portrait) or horizontal (landscape)
- Use pencil and ruler and draw a master, then copy.

2. Computer version

- Use your form right on your computer
- Spaces expand as you type so form is flexible
- Carry it in a USB jump drive
- Use it on a laptop