

Master Your Family Tree Research

A course by Dr. Sophie Kay, www.khronicle.co.uk ♦ Autumn 2025 ♦ **Week 1: Research Logs**



Welcome to Week 1 of your course! If you're completely new to research logs, then keeping one might feel a little daunting at first, *but it needn't be*. You can start small, just writing one line of log for each research session to start with. Once you have a good habit going, build it from there!

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Your Week 1 Challenges...

Whether you're an experienced hand or are relatively new to family history, here are the three challenges from the close of today's session. Delve into as much family history as you can over the coming days, and try these tasks alongside your Worksheet exercises to develop your skills further:

- ONE:** Set up a research log (or continue an existing one) and actively use it in every single research session for the next week.
- TWO:** Print off the bingo card from your worksheet and see how many items you can complete.
- THREE:** Spend 20 minutes using your log to reflect on **HOW** you're doing your family history research

Remember to SNACK

There are **many different ways** to keep a research log. You just need to find the approach that's right for **YOU**, and then it'll be easy to habit-form and will soon become a natural part of your research routine.

No matter what you choose, as long as your log meets our SNACK criteria below, then you're good to go!



Secure – are you backing up your log somewhere on a regular basis?

If you're using a paper-based log then you may want to take photographs of each page, which can then be saved on a computer. Digital log users amongst you might benefit from a cloud-storage facility...

- **Dropbox** (file storage): <https://www.dropbox.com/>
- **GitHub** (version control and file storage): <https://github.com/> Although this was originally designed for computer programmers, it also works well for storing your files, tracking changes – and keeping things in a private repository!

...or search for **cloud storage solutions** online. Here's a 2025 article on cloud storage providers to give you some ideas: <https://uk.pcmag.com/file-syncing-and-backup/3682/the-best-cloud-storage-and-file-sharing-services-for-2020>

Navigable – can you always track back through your log to find the information you need?

Word or spreadsheet users may find the **Search** facility (**CTRL + F**) useful in locating specific words or phrases in their document. If you're using Word for Mac, or Apple Pages, then you'll need **CMD + F** for this.

Those of you opting for a spreadsheet approach have a raft of additional navigability shortcuts at your fingertips – including the Search facility, cell colour fills, conditional formatting and Filters. Check out the advice tips later on in this handout to explore these further.

And no matter how you approach your research log, make the best use of **colour** if this works for you...

- **Traditionalists** using a handwritten log might want a range of coloured pens, highlighters and washi tape (e.g. <https://misopaper.co.uk/browse/products/tape/washi-tape/>). Good-quality, coloured post-it notes can be great for leaving those “next time” reminders to yourself as well. You might also want to use coloured tabs which stick out the side of your notebook or file, to help you locate log sheets for particular surnames.
- **Digital users** might make careful selections of fonts and colour to bring visual structure to their page.

Adaptive – does your log dovetail with your own needs?

Hate spreadsheets? If so, that's absolutely fine – so don't use them for your research log?

Or do you loathe writing by hand? Then embrace technology and turn to typed documents, spreadsheets or a research log facility within the family history software that you're using (be aware that not all family history programs have this as an option). You might also explore note-taking software such as **Evernote** <https://evernote.com/>

If you'd like a halfway house between handwritten and digital, then you might like to take a look at **Rocketbook** (<https://getrocketbook.com/>). They sell reusable notebooks which you write on with a special pen, and when you photograph the page, the app converts your handwriting into digital text on your computer!



If you're a keen genetic genealogist, then you might be using software such as the **Genealogical Data Analysis Tool** (GDAT), <https://sites.google.com/view/genealogical-dna-analysis-tool> or **DNAGedcom**, <https://www.dnagedcom.com/>, to manage data readouts for large numbers of DNA matches.

These can be superb additions to your workflow, but remember they aren't the same thing as a research log. Embrace these tools for the many benefits they bring – just remember to add a brief note in your research log to remind you of what you did with them during a particular research session.

Consistent – are you including the same, useful information fields every time?

Whether you're using a written list, a spreadsheet or another approach entirely, ensure that your log has some predefined fields to help you keep on track.

Starting out with logs? Start simple: as a minimum, have fields, headings or prompts for...

- Today's **date**;
- The **surname**, family or person of interest you were exploring;
- Which **site** or **archive** you were using, and its **URL** (web address);
- What you **did** in your research (e.g. *which collections did you search and how? What were the results?*);
- **Document references** for those wonderful historical records you've used;
- General **notes** on items you've ordered, and **to-do tasks** you still need to complete.

We've provided some downloadable log sheets for handwritten logs, Word documents and spreadsheets on your course webpage, if you'd like to use these as a starting point. Adapt them as you need to suit YOUR requirements!

You can also find some templates for more detailed log-keeping amongst the course downloads. If you're a confident researcher, please feel free to make use of these rather than the basic versions.

Knowledge-Focused – could someone else (or older you) reconstruct your research path later on, based on what's written in your research log?

The only real way to know if your log meets this requirement is by actively using it for a few sessions, and then looking back at previous entries to see if you can understand them.

Remember: **your approach will develop over time**. As you become more confident with creating and using research logs, you may find yourself updating and refining your approach. That's absolutely fine: the most important thing is to get started with one today, no matter how simple it is initially!



Spreadsheet Gems

The ideas below are for the spreadsheet users amongst you, but remember – **not every log has to be a spreadsheet!** If Word documents, logs in family history software, or handwritten logs are more your thing, then use those instead.

For the spreadsheet fans: whether you use Numbers, Excel or another package entirely, here are some ideas to enrich your spreadsheet-based log. *Image left c/o Rubaitul Azad, licensed via Unsplash+*

Fills (Shade and Colour)

We can apply colour to cells in a spreadsheet (often known as a 'Fill' operation) to guide our eye over the page:

- Microsoft **Excel**: <https://support.microsoft.com/en-gb/office/add-or-change-the-background-color-of-cells-in-excel-ac10f131-b847-428f-b656-d65375fb815e>
- **Numbers** (Mac) : <https://www.youtube.com/watch?v=sod5xDNbK98>

You might choose to have the entire Reference column in a contrast colour – or perhaps you like to highlight in orange the boxes which have a TO-DO item in them?

Conditional Formatting

Perhaps for the more confident spreadsheet users, conditional formatting allows you to apply colour to specific cells in the spreadsheet, either temporarily or permanently.

The colour is applied according to rules which you choose – perhaps you want to highlight all the entries relating to baptism records, or maybe you want to highlight all the log entries relating to the period 1780 – 1800...

- Conditional formatting in **Excel** (Windows): <https://support.microsoft.com/en-gb/office/use-conditional-formatting-to-highlight-information-in-excel-fed60dfa-1d3f-4e13-9ecb-f1951ff89d7f>
- Conditional formatting in **Numbers** (Mac): <https://support.apple.com/en-gb/guide/numbers/tan93f5de5c3/mac>

Filters

Use Filters at the top of your columns to sift through your log entries and temporarily reduce the long list of log entries to a subset, based on what you'd like to look at.

Perhaps you're budgeting, and want to look at the number of entries where you've used *Ancestry*, *FindMyPast* and *MyHeritage* to work out which sites you're getting the best value out of. You might also use filters to, say bring up all the entries involving a particular record set to see how thoroughly you've searched it.

- **Excel** in Windows– Applying Filters from the Data panel: <https://support.microsoft.com/en-gb/office/filter-data-in-a-range-or-table-in-excel-01832226-31b5-4568-8806-38c37dcc180e>
- **Numbers** on a Mac– Applying Filters in Numbers: <https://support.apple.com/en-ie/guide/numbers/tan28bd63a8a/mac>

Referencing Guides

There are many books on citation available, but for an accessible, user-friendly guide which covers genealogy-specific examples, Ian McDonald's book is a great place to start.

- *Referencing for Genealogists: Sources and Citation*. Ian G. Macdonald (History Press, 2018)

If you're a more experienced researcher and looking for a comprehensive guide to family history referencing, then Elizabeth Shown Mills' book may be of interest.

- *Evidence Explained: citing history sources from artifacts to cyberspace*. Elizabeth Shown Mills (Genealogical Publishing Company, 2024)

My Session Notes

Your Week 1 Worksheet (provided separately) includes space for responding to the various exercises during and after the session. The space below provides an additional area to add your notes and thoughts.