

RESEARCH LOGS: *What, Why and How?*



What is a genealogy research log? Why would you create one? And how do you go about doing so? **Dr. Sophie Kay** is here to explain the wealth of family history benefits you'll enjoy – all with the aid of your research log

You've probably heard the story of Theseus and the Minotaur: how the young hero wound his way through a fiendish labyrinth, to slay the fearsome beast hidden in its confines.

But do you recall how Theseus escaped from the maze, when others had been trapped there forever? He fastened one end of a ball of thread to the labyrinth's entrance and used it to trace his route from the beginning, following its path on his return.

When it comes to our family history research, we need our very own 'ball of thread' to prevent ourselves from becoming lost amongst the many twists and turns of our research journey. That ball of thread comes in the form of a research log.

If you're not used to keeping one then this might sound like an intimidating prospect, but it needn't be. I promise you it's entirely achievable and brings a wealth of benefits to your family history! So let's delve into the WHAT, the HOW and the WHY of the research log...

What is a research log?

A research log is a document where you note down the tasks you've completed in each family history research session. It's a versatile, broad-ranging tool and can include a range of details such as:

- searches you've run –

which collections did you search, when and on which platform? Which search parameters did you use and what were the results?

- references or archival codes for the historical evidence you've consulted;
- 'to-do' reminders for tasks which need following up;
- notes marking progress with tasks such as writing up your research;
- keeping track of correspondence with archives and other researchers...
...and any other observations which might be relevant to your research.

Your log can be digital or handwritten, and, as we'll see shortly, there is more than one way to go about keeping one.

Before we get onto that though, what's the point of tracking all this information in the first place?

ancestors of ours. We don't want to waste any of these by repeating a task or purchase unnecessarily. Did you really need to order a third copy of that 1856 marriage certificate, simply because you didn't remember ordering it the first two times? Does a complex problem have you going around in circles, because you can't recall where you have and haven't searched for your ancestor?

By keeping track of the searches you've run, the tasks you've carried out, and the purchases you've made, your research log helps you to invest your resources in the most effective and appropriate way. This added layer of organisation brings clarity and accountability to our process, laying out all the components of our research before us so we can see the bigger picture.

The structure of a good log can

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Why maintain a research log?

Although there are plenty of economical ways to enjoy family history, most of us invest considerable time, energy and money in pursuing those

also help you to work through a problem. Going back to Theseus and that ball of thread, we sometimes talk about 'losing the thread' when we become distracted or our train of thought is disrupted. Just like navigating



that labyrinth, the research log 'ball of thread' encourages you to keep track of your thoughts and evidence. This contributes to coherent, considered arguments and helps you to find *your* ancestors, rather than their namesakes!

Let's talk contents – (essential contents)...

As a minimum, include the following essentials in your research log:

- The date of your research session;
- Basic tasks carried out, regardless of whether they succeeded;
- Details of the searches run and any results (including negative searches, where you didn't find a suitable match);
- References for any records or resources consulted.

There is no one-size-fits all when it comes to the style and extent of your log, so you may need to experiment with a few different approaches until you find a system which works for you. I've shown you some fictional examples on pages 12-15.

Yet there are a few elements

which are present in all good research logs. Let's take a look at those now.

Remember to SNACK

Research logs come in many sizes and shapes. Whether you keep a highly detailed log or have adopted a simpler form, ensure it ticks the following boxes:

SECURE: Back up your log regularly! A variety of cloud storage solutions is available, including Dropbox <https://www.dropbox.com>, amongst others (explore alternatives here: <https://www.techradar.com/best/dropbox-alternatives>). I use the version-control platform GitHub for my research <https://github.com/>.

If you decide to keep a handwritten log, photograph or scan the pages and back up those images to a computer so that you have a secondary copy.

NAVIGABLE: You're not logging your sessions just for the sake of it – you need to be able to USE this information in the future! A well-structured page will be easier to retrieve information from further down the line. If going digital, choose a package (e.g. spreadsheet, text document) with text-search or tagging facilities which allow you to locate entries easily, such as finding the date when you last worked on a particular surname branch. If using a handwritten log, an indexed filing system and coloured tabbed stickers will help you navigate your notes in the future.

ADAPTIVE: This might sound obvious, but the best research log is one you'll actually keep to! Provided that you've included the 'essential' information fields noted earlier, choose a format which dovetails with your working style: this will help you habit-form in the long run. I'm a massive fan of spreadsheets, but some of my research students aren't and prefer to use Word documents or even handwritten notes. This is fine, as long as your system meets the SNACK requirements overall.

TIP! Remember that the log is there to serve you, not the other way around, so it should meet your needs and those of your research. For example, a DNA research log will require different fields to one for traditional research.

CONSISTENT: Your research log works together with your overall research plan

Join us for Dr Sophie Kay's 'Research Skills Studio'

The Research Skills Studio is a 4 week online course. Taking place from 9 to 30 April, the course costs £109 (or £69 for Family Tree subscribers or Family Tree Plus members).

To find out more and book your place, please see www.family-tree.co.uk/store/downloads/family-tree-magazine/research-skills-studio/

OUT NOW! The Family History Research Skills Workbook by Dr Sophie Kay

The Family History Research Skills Workbook is also available as a printed publication, priced £20 (£11.99 for Family Tree subscribers or Family Tree Plus members). To order your copy, please see www.family-tree.co.uk/store/genealogy-tools/family-tree-magazine/research-skills-workbook/ Please note: a digital copy of the Workbook is included in the Research Skills Studio course price.



1 The Newbie

- One log sheet for **all** your research
- **Colours** help us to navigate the structure
- There's *always* space for a **Reference** column!

Date	Tasks Completed (what did I do? which collections did I search and how? What were the results?)	References	Details, Notes, Orders Made & To-Do Items
26 October 2019	Searched <i>England and Wales Births</i> on FreeBMD for Edward L'NGLEY, born West Bromwich 1880 - 1890. 2 results, both Edward LANGLEY:	Mar 1883 Vol 6b Page 915; Sep 1883 Vol 6b Page 843	Checked on GRO.gov.uk - Mar 1883 entry has mother ANSLOW. Certificate ordered. Received and filed 2 Nov 2019.
17 May 2020	Created a waitlist for BMD certificate ordering from GRO once normal services resume. Surnames ALDERSEY, BROWN, HARRAP.		See <i>Document Wish List</i> tab for reference details of certificates
13 June 2020	Transcribed the will of Joseph Henry HARRAP of Shoreditch, dated 6 Feb 1869. Letters of admon (will annexed) granted 15 June 1870.		TODO: Joseph's sister Jane Elizabeth KOPPEL was appointed guardian to his three children - find evidence for their lives between this point and adulthood
05 January 2022	Document wish list - ordered certs for the ALDERSEY births for 1880, 1883, 1886		
06 January 2022	<i>1921 Census of England and Wales</i> released on FindMyPast, www.findmypast.co.uk. Searched for John ALDERSEY, born 1877, resident Carlisle. 1 result is a match, household return located and downloaded.	RG 15/25792	Household address <i>10 Scotch St., Carlisle.</i>
26 June 2022	Initial search of the <i>Cheshire Wills and Probate</i> collection on FindMyPast, www.findmypast.co.uk, seeking TIMPERL?Y records in the period 1800-1840.		39 results, did not have time to inspect the list but have saved results in spreadsheet TimperleyProbate.xlsx

Log provides continuity to help this person manage considerable gaps between research sessions

Includes the when, where, what & how of all searches, including 'wildcards' used for some surnames (e.g. **TIMPERL?Y** will catch TIMPERLEY, TIMPERLAY etc.)

Note **TO-DO** items and link to external files

OPTION 1: The Newbie Research Log

- Set up a spreadsheet for your Research Log. Create a 'Master Research Log' tab, and column headings for: Date; Tasks Completed; References; & Details, Notes, Orders Made & To-Do Items
- Note also the 'Document Wish List' tab, a dedicated space for you to track the details and references of historical records you'd like to consult

to pursue that research to its conclusion. Every research occasion should generate at least one log entry; busy sessions involving multiple searches might produce many such entries. If you design your research log with a clear layout and pre-allocated fields to complete, these will serve as prompts, encouraging you to set down all the necessary details of what you've done and what you achieved in each session.

KNOWLEDGE-

FOCUSED: Step back after you've written each log entry. Is your description an accurate account of what you've done, and could another person

(such as you in 2 years' time!) reconstruct that process from the information provided?

If you've included the essentials (or more) and remembered to SNACK, then you've established a good research log!

There's a multitude of ways to keep a research log – my four fictional examples shown on pages 12-15 are just initial ideas, but spreadsheets aren't the only route! Which of these four are you?

1: The Newbie

If you're completely new to research logs, then it's best to start simple, particularly if you find the prospect a little

intimidating. Jumping straight in with a highly detailed log (useful though that might be) is more likely to make you feel overwhelmed and you'll be less likely to habit-form. Ease yourself in by completing a basic research log entry every time you do some research. Refine and expand your log from there as you grow in confidence.

2. The DNA Sleuth

You don't have to maintain separate logs for traditional and DNA research, although the different resources and processes of genetic work typically benefit from tailored headings. Why not keep the match list(s) for your kit nearby in a linked tab



to track who you've contacted, who's been placed in your family tree, and who your common ancestor(s) are? You'll still need a dedicated search log to record all the historical documents used in tree-building too.

3: The Confident SNACKer

Once you're used to using research logs, refine your approach over time. The sky's the limit!

I like to keep a 'master log' containing a brief summary of the tasks and surnames for each research session, alongside a separate spreadsheet for each surname in my family tree.

Detailed search descriptions and research minutiae get logged in the relevant surname sheet, within which there is a separate tabbed page for each individual.

That's only one approach! Tech-minded folk might maintain a log on a note-taking app of their choice (ideas here: <https://www.theverge.com/23942597/notes-text-evernote-onenote-keep-apps>), many of which offer a single, integrated environment to unite your research log with the evidence and other notes you mention in those log entries.

4. The Traditionalist

Traditionalists may prefer a

handwritten research log. If this works best for you, then that's fine – but the 'essential headings' and SNACK criteria still apply.

Use a clear structure and layout, write neatly and back up your written logs regularly, whether through scanning the pages or taking photographs. Save these files in a backed-up folder on your computer.

The Benefits of Your Ball of Thread

Still need some persuasion?

Start your research log today and begin to reap the benefits:

Get help staying on track: Any of us can be tempted to wander

2 The DNA Sleuth

- One spreadsheet, multiple tabs
- You still need a search log to record the historical documents used in tree building!

OPTION 2: The DNA Sleuth Research Log

- Set up tabs for DNA Research Log, Search Log and Genetic Matches
- For your DNA Research Log tab, column headings include: Date of Research Task; Archive/Online Provider; Research Details; & Notes.
- For your Genetic Matches log, column headings include: Match name; Messaged or Placed?; Match length (cM); No. of segments; Platform; Tree?; Shared Matches; & Notes
- Use the Search Log tab to record the record set searches associated with your tree-building investigations

off down a tangential rabbit-hole of glorious online resources and end up looking through things which aren't relevant to our research. Your research log provides an overview of what you've already done, so you can keep track of where you're up to and what you need to do next.

Use your log as a quick reminder:

Occasional researchers will gain extra support from the continuity which a research log provides. If you have caring responsibilities, chronic medical issues or a busy working life, time for family history research may be a luxury. Even if months or years go by between research sessions, your log offers a quick

reminder of what you were doing last time so you can pick up those strands of research straight away on your return.

Refer to it to identify erroneous steps:

We all make mistakes sometimes. Being able to retrace our steps when errors occur helps us identify where we went wrong, and avoid having to rip up all our research and start from the beginning

Study it to address your blind spots:

Did you miss something? Perhaps your 'brick wall' is only there because there's a key search you haven't run, or a record set you've forgotten to look at. By keeping track of your searches,

you can identify these blind spots and address them!

Don't leave a stone unturned – rerun searches periodically:

Knowing what was searched – and when – lets you see when it's time to revisit some of those searches for an elusive forebear. Rerun searches when an existing collection is extended, if a new set of records is digitised, or to account for errors in search indexes being amended over time.

Give yourself space to think & reflect

Keeping a research log might demand an ever-so-slightly slower pace of research, but that's

3 The Confident SNACKer

Date	Information Sought	Site, Provider or Database Searched	Archival Collection or Dataset	Search String & Parameters	Search Results	Document Reference	Notes
May 2022	Marriage registration for EJC	FreeBMD, www.freebmd.org.uk	England and Wales Marriage Registrations, 1837 - 1994	Elizabeth CANNON marrying MATHER, no year or location specified	2 results: Elizabeth CANNON (groom Joseph MATHER), Jun 1874 Bolton 8c 390; Elizabeth Jane CANNON (groom Frederick MATHER), Sep 1896 Bury 8c 737.	Sep 1896 Bury 8c 737	Certificate for 1896 entry ordered
01 May 2022	Parish marriage register entry for EJC	Ancestry, www.ancestry.co.uk	Manchester, Church of England Marriages and Banns, 1754 - 1930	Searched for Elizabeth Jane C'NON marrying MATHER.	No result. On closer inspection this register only goes through to 1854 for Bury St. Mary	Sep 1872 Bury 8c 445	Elizabeth Jane, the daughter of Willis Jane, nee Tomkinson. Born 7 Aug 17 Bury, the family home. Father Will registered on 17 Aug 1872 by her rather than a signature
10 May 2022	Civil birth registration for Elizabeth Jane CANNON	FreeBMD, www.freebmd.org.uk	England and Wales Birth Registrations, 1837 - 1994	Searched for Elizabeth Jane C'NON, born Bury, no year specified	1 result: Elizabeth Jane CANNON, born Bury, Sep 1872 Vol 8c Page 445		
10 May 2022	Baptismal entry for Elizabeth Jane	Ancestry	Manchester, England, Church of England Births and Baptisms	Elizabeth CANNON, d.o. William and Jane,	Top result is a match: Elizabeth Jane Canon, d.o. William (Iron Turner) and Jane; living in		

Elizabeth Jane CANNON William CANNON

Each surname gets its own log spreadsheet—and each individual gets their own tab
Use these alongside a 'master log' every session, to draw all your research together

Spreadsheets are only one way to a research log...why not experiment with **note-taking software?**



OPTION 3: The Confident SNACKer

- Set up a spreadsheet for each surname, and a tab for each individual. In this example, the spreadsheet is for CANNONS. Cross refer from your Master Research Log to your surname spreadsheets and individual tabs, to enable you to pick up your research more easily
- Column headings include: Date; Information Sought; Site, Provider or Database Searched; Archival Collection or Dataset; Search String & Parameters; Search Results; Document Reference; & Notes