

# Techniques & Tools for Streamlining Your Research

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## I General Strategies for Streamlining

### A. Organize Thoroughly

1. Chart all information (pedigree charts, FGS, individual info sheets, periodic summaries, timelines)
2. Create Research Logs - Paper and/or electronic. Things you have done and things you plan to do.
3. Organize Folders/Notebooks
  - ✓ Forms and Charts
  - ✓ Maps
  - ✓ Language Aids
  - ✓ To do

### B. Background Research

1. **FamilySearch Wiki** See U.S. at [https://familysearch.org/learn/wiki/en/United\\_States](https://familysearch.org/learn/wiki/en/United_States)
2. **“How To” Books and Websites, State Archives and Libraries**

### C. Survey Source Availability

1. **FamilySearch.org** [Always sign in. Some data will not show up unless you do.]
  - ✓ Search Databases: *Records, Books, Genealogies*
  - ✓ *Catalog* – Search town, county, state, country, also surname, keyword, subject;
2. **Free Sites – From Home**
  - ✓ US Genweb Site for every state and county [www.USGenweb.org](http://www.USGenweb.org)
  - ✓ Linkpendium Search by surname or state [then county].
  - ✓ Genealogy Records, Indexes, Databases <http://www.germanroots.com/databases.html>
3. **Free LDS Partner Sites** <https://familysearch.org/partneraccess> 4 now!  
<http://blog.myheritage.com/2016/04/introducing-the-myheritage-community-receive-help-or-help-others/>
4. **Pay Sites – Most pay sites have a free section.**
  - ✓ Free premium family history websites available in the Family History Center Portal – FHC <https://fhc.familysearch.org/resources.html> including Puzzilla Premium
    - Free subscription sites FHL SLK [https://www.familysearch.org/learn/wiki/en/Family\\_History\\_Library\\_Computer\\_Resources](https://www.familysearch.org/learn/wiki/en/Family_History_Library_Computer_Resources)
  - ✓ Check your local public library, local historical and genealogical society facilities.
  - ✓ Check local College/University libraries – Institutional Subscriptions
  - ✓ Take advantage of the 2-14 day free trial offers available on most pay sites.

## II Streamlining Internet Research

### A. Word Processor – Word, Word Perfect, Open Office, etc.

1. **Have programming running** all the time while you research.
2. **Upon locating data:**
  - ✓ Copy and paste data immediately
  - ✓ Copy and paste URL and any source information
  - ✓ Record date of search & what was located
  - ✓ Copy and Paste specific data to notes or sources section of your database software as needed.
3. **Returning to search stored documents?** Why did I save this?  
Search document quickly using your note about what was found and the *Find* feature.

## **B. Browser – You browser can help you speed up internet searching!**

Do Google or other search →Select hit →Press “Control +F” →Enter desired name or term.

## **C. Organize Files and Folders**

1. **Include the date** in your computer file names, i.e. xxxxxxxx\_9 Dec2016
  - ✓ Static vs. Dynamic Files – Do you need to search database periodically?
  - ✓ Note date of search, location searched, and names and name variations searched.
2. **Various folder ideas:**
  - ✓ Have a folder for each research project.
  - ✓ Folder for each surname or family unit.
  - ✓ Folder for each location [country, state, county, town as needed]

## **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:**

1. **Use FS *Catalog*** to locate sources available through the FHL SLK.
2. **Book Hits [See Search then Books]**
  - ✓ For any titles located check local libraries for possible copy. Also Internet Archive
  - ✓ Use WorldCat at [www.WorldCat.org](http://www.WorldCat.org) to locate other copies.
  - ✓ ILL where possible.
  - ✓ USGenweb and other Look-ups such as Google Books.
3. **Films & Fiche**
  - ✓ FS Catalog will show you if other FHCs have a copy. In catalog entry see Location. If there is a dropdown arrow, check it out.
  - ✓ Online Film Ordering from FHL SLK <https://familysearch.org/films/>
  - ✓ Make a list for your next trip to Salt Lake
  - ✓ ILL
4. **Digital Collections - Google title to see possible hits.**
  - ✓ FamilySearch.org - At Search dropdown list, click on Books. 200,000+ digitized books are available from 12 libraries. If you get the “no rights” message - see at an FHC.
  - ✓ Archive.org - [www.archive.org](http://www.archive.org) has downloadable copies of many pre-1923 books.

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

1. Make Catalog Print outs or cut and paste info into a document file creating a “to do” list.
2. FHC Consultants
3. Reference Books & Websites

### **C. Use Resources of your local public library:**

1. Books including background research and “How To” genealogy research books.
2. **In house subscriptions** to institutional only databases.
3. **Pay databases** [HQ is available free of charge at home in many states thru public library system.]
4. **ILL** opportunities

### **D. Local College/University Library**

1. **Holdings** - Academic Film, Fiche, Periodicals, Special Collections, Map Collections, Books
2. **In house subscriptions** to “institutional” databases, subscription websites. Newspapers +
3. **Digitized Collections**
4. **ILL** opportunities?

**E. Church History Library** <http://churchhistorylibrary.lds.org/>

1. **In Person** - Books, Documents, Research Guides and databases

2. **Internet Options:**

- ✓ Digital Collections; Research Guides with links; Online Resources;
- ✓ Church History Catalog <http://churchhistorycatalog.lds.org/> Includes: Published materials, manuscripts, photographs, periodicals; See “How To” videos about searching the Catalog.

**F. Family History Library SLK - Now you will be doing only things that cannot be done elsewhere!**

1. Consult with language and locality experts.
2. Scan/copy film and fiche using abundant equipment.
3. Use books/film not available where you are located. [Not all film can be ordered.]
4. Use a vast array of pay databases free of charge.

#### **IV Tools for Streamlining – Charts and Forms**

**A. Research Logs/Research Calendars**

1. Create and print your own with a chart maker feature. Cut and paste catalog entries, book titles.
2. Create electronic research logs with spreadsheet program such as Excel, Quattro Pro
3. Some genealogy programs have this type of feature built in.
4. Using-and-Managing-a-Genealogy-Research-Log, Thomas MacEntee  
<http://hackgenealogy.com/wp-content/uploads/2015/01/HANDOUT-Using-and-Managing-a-Genealogy-Research-Log.pdf>
5. Returning to Genealogy With New Tracking Tools <https://grandmasgenes.wordpress.com/>

**B. Correspondence Logs**

1. Letters
2. Email/Faxes

**C. Social Media Log**

1. **Queries Posted** on Message Boards or Mailing Lists
2. **Postings** on FaceBook, Pinterest, etc.

**D. Time lines – Include Event, Name, Location, Date**

1. Ancestral Quest has a time line function. So Does
2. Make one using your word processor – customize to your project
3. Use Word Processor features –
4. Free Timeline Generators: Our Timelines [http://www.ourtimelines.com/create\\_tl\\_2c.html](http://www.ourtimelines.com/create_tl_2c.html)  
Dipity <http://www.dipity.com/> TimeGlider <http://www.timeglider.com/> ISpring Suite  
<http://www.ispringsolutions.com/timeline-maker> WhenInTime <http://whenintime.com/>

**E. Individual Information Sheets** – Biographical material not applicable on FGS

**F. Census Comparison Forms 1790-1840, 1850-1930**

<http://www.scottsmithonline.com/interests/clinton/CensusData/CensusForms1790-1930.pdf>

**G. Record Check Lists** -- General Records, Military, Census

**H. Record Extract Sheets** -- General, Census – forms that replicated the column headings

**I. Other** – Whatever source you are using – is there a form for taking notes or can you make one that will streamline your work? Ex. Excel spreadsheet for cemeteries.

## V Where Can I Obtain Charts and Forms??

**A. 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 or use a Spreadsheet
- ✓ Spaces expand as you type so form is flexible
- ✓ Carry it in a USB jump drive
- ✓ Use it on a laptop or other device
- ✓

**B. Free Forms, programs on the Internet**

◆ **Family Search** [www.familysearch.org](http://www.familysearch.org) [https://familysearch.org/wiki/en/Genealogy\\_Research\\_Forms](https://familysearch.org/wiki/en/Genealogy_Research_Forms)  
Forms and Links to More Forms – Most Comprehensive Listing

◆ **ObituariesHelp.org** [http://www.Obituarieshelp.org/genealogy\\_forms\\_downloads.html](http://www.Obituarieshelp.org/genealogy_forms_downloads.html)

◆ **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

◆ **Kindred Trails** [http://www.kindredtrails.com/free\\_genealogy\\_stuff.html](http://www.kindredtrails.com/free_genealogy_stuff.html) Links to free genealogy stuff .

◆ **Gramps** <https://gramps-project.org/> Software for research, note taking and organization

◆ **Evernote:** <https://evernote.com/> **Google Keep** <https://www.google.com/keep/>

**MS OneNote** <https://www.onenote.com/>

## VI Mindset for Streamlining Your Research

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

### 1. Use with care:

- ✓ Read the part about “how to” search.
- ✓ Do names or other fields have limitations, truncations
- ✓ Is there a description of the contents? Read it.
- ✓ Search features? Wild cards? Search without a given name?

**2. Have/create a list** with possible name variants, note which variants you have searched on RL.

**B. Books** – similar concepts.