



# Research Logs

A Tool for Organizing Your Research

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*Documentation speeds further research and lack of it assures failure.*<sup>1</sup>

**At the end of class each student will:**

**I. Be able to describe what a *research log* is.<sup>2</sup>**

- A. A *research log* is comprehensive list of sources you already searched, or plan to search including:
1. Purpose of each search (what you want to find).
  2. Summary of significant findings and where your copies are.
  3. Notations showing sources searched where you found nothing.
  4. Lots of comments about your search strategies, suggestions, questions, and discrepancies.
- B. Good *research logs* help:
1. Cite your sources. This shows quality research.
  2. Sort out what has and has not been found.
  3. Organize and correlate copies of documents.
  4. Weigh evidence to make better conclusions, and better lineage links.
  5. Show your search strategies and questions.
  6. Reduce unwanted duplication of effort.

**II. Have a desire to ALWAYS use *research logs* during research.**

- A. Why should **every** family history researcher, including you, use *research logs*?
1. *Research logs* help in EVERY step of the research process.
  2. *Research logs* show negative evidence. NO other tool does this nearly as well.
  3. *Research logs* save time:
    - a. *Logs* help avoid repetitive searches after a pause.
    - b. *Logs* become a table of contents to file documents.
  4. *Logs* serve as a foundation on which the next generation of researchers can build.
- B. Query: Has anyone here had a *research log* help your research? Please, tell us about it.
- C. Please try a six months experiment to convince you *research logs* save time and improve research:
1. For six months fill out a log BEFORE looking at each source.
  2. After each search, summarize the results on the *log*.
  3. After six months, pause to reflect if using *logs* has helped speed and improve your work.

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<sup>1</sup> Karen Clifford, "Documentation: A Love-Hate Affair," *Genealogical Journal* 24 (1996): 162.

<sup>2</sup> G. David Dilts, "Research Logs: The Most Important Tool for Organizing Your Family History," *Genealogical Journal* 30, no. 1 & 2 (2002): 3-13.

**III. Be able to describe a file-folder / notebook filing system for genealogical records.**

- A. File-folders (either paper, or computer folders):
  1. On the file tab write the name of the husband, his birth and death years, & wife's name / years.
  2. Keep folders in alphabetical order by the name of the husband.
  3. Metal or plastic clasps are optional.
- B. Three-ring binder notebooks:
  1. Divide your pedigree into several parts and file those parts in several notebooks.
  2. Separate families with divider tabs showing the husband's and wife's names.
  3. Keep families in alphabetical order within each notebook.
- C. Recommended order of each family's papers in both the file-folder and three-ring notebook system:
  1. Family group record.
  2. (Optional) pedigree chart.
  3. (Optional) maps.
  4. *Research logs*.
  5. Copies of documents in order by the document number you assign them.

**IV. Be able to fill-out each part of a research log to best advantage.**

- A. **Ancestor's name and years:** husband being researched, e.g. William FRAZIER 1826-1881
- B. **Researcher's name:** your name.
- C. **Date of search:** e.g. 8 May 2001; Records you plan to search without a date until searched.
- D. **Place of research:** use full mailing address, telephone/fax number, e-mail address, or Internet URL.
- E. **Purpose** (objective) of search: **event** and **person** being sought (use symbols), e.g. \* Robert. Event symbols for objectives & results: \*=birth ∞=marriage †=death (Bapt Endw SlgP SlgS)
- F. **Call number** (not your file number!): library or archive call *number* e.g. FHL Book 977.162 D3d
- G. **Source Description:** author, title, where the original is (*i.e.* a publisher or repository), date, & page.
  1. Log the source information at the catalog BEFORE retrieving the item.
    - a. Source information is easier to find in the catalog than in the source itself.
    - b. It is easier to write nil if the search is negative; overcomes a temptation to not write it at all.
  2. Write source descriptions in footnote format. Use the *Chicago Manual of Style* as a guide.<sup>3</sup>

<b>Basic Parts of a Footnote</b> (according to the <i>Chicago Manual of Style</i> ) with examples						
<b>Books<sup>A</sup></b>	Author,	<i>Title</i>	(Publ. Town:	Publisher,	year),	pages.
<b>Microfilmed manuscripts<sup>B</sup></b>	Author,	"Title"	(Repository,	Town,	year, microfilm),	pages.
<b>Computer databases<sup>C</sup></b>	<i>Database</i>	(Publ. Town:	Publisher,	year),	search key	
<b>Internet sites<sup>D</sup></b>	Author,	"Page Title"	in website	last update	[accessed date]	at URL.

<sup>3</sup> G. David Dilts, "Citing Sources Using the *Chicago Manual of Style*," *Genealogical Journal* 24: 4 (1996), 149-53. See also Elizabeth Show Mills, *Evidence Explained* (Baltimore: Genealogical Publishing, 2007).

<b>Letters or email</b> <sup>E</sup>	Author,	Author's Town,	full date,	letter to recipient's name,	Town.	
<b>Periodicals</b> <sup>F</sup>	Author,	"Article Title,"	<i>Periodical</i>	vol. number	(month, year):	pages.
<b>Interviews</b> <sup>G</sup>	Subject,	"Title,"	interview by,	medium, date	repository,	pages.
A. Clement Luther Martzloff, <i>History of Perry County, Ohio</i> (New Lexington, Ohio: Ward & Weiland, 1902), 152.						
B. Juab County (Utah), Recorder, "Deeds, 1947-1948" (Family History Library, Salt Lake City, Utah, microfilm), Q: 54-57.						
C. California Dept. of Health Services, <i>California Death Indexes on CD</i> (Sacramento, Calif.: CDHS, 2002), 1969: Gee, Eva.						
D. National Genealogical Society, "Standards for Sharing Information with Others" in National Genealogical Society (Internet site), 2003 [accessed 11 November 2003] at <a href="http://www.ngsgenealogy.org/comstandsharing.htm">www.ngsgenealogy.org/comstandsharing.htm</a> .						
E. Robert Frazier, Wichita, Kans., 10 May 2003, email to G. David Dilts, Salt Lake City, Utah, 3.						
F. G. David Dilts, "Citing Sources Using the <i>Chicago Manual of Style</i> ," <i>UGA Genealogical Journal</i> 24 (1996): 149-61.						
G. Katie Beller, "Beller Family," interview by Bryan Dilts, notes, 12 August 1973, G. David Dilts, Salt Lake City, Utah, 2.						

H. **Document number** (your number) makes your *log* a table of contents to your copies.

1. If the search results are negative, leave the document number field blank.
2. If positive, use husband's name/years (file name), plus the next unused number.

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J. **Results** of search (positive or negative).

1. List event and person found. Use the same event symbols as you would for the Purpose column.
2. Do not list dates. This forces you to look at document copies.
3. If search results are negative, use Anil@ or Ø (as opposed to blank).
4. Blank results means you have not yet done a search in that source.

K. **General Suggestions:**

1. Design your own modified *research log* with features you will use.
2. Use acid free paper, black ink, and make notes understandable 100 years from now.
3. If you use a computer to log research, print a paper copy of your *log* at the end of each day.
4. Spill over the allotted space as needed.
5. Write lots of notes: strategies, analysis, conclusions, questions suggestions, and discrepancies.
6. Keep everything on one set of *research logs*; do NOT keep separate *correspondence logs*.
  - a. Keep a copy of all letters.
  - b. Assign a document number to both the inquiry and the reply.
7. Use one set of *research logs* for each family's file folder; NOT one huge *log* for all families.

L. **Special Situations:**

1. But each ancestor was in two families, once as a child, and once as a parent:
  - a. Events before marriage go on the father's *research log*.
  - b. Events starting with marriage go on the husband's *research log*.
2. Some **source documents** include two or more families. *Solution:*
  - a. Pick the most predominant family on the document.
  - b. Put the document copy in that family's file.
  - c. Compose your document number based on that family.

- d. Write your document number on the back of the copy, AND . . .
  - e. Log such a source on **all** applicable *logs*. Some *logs* will list another family=s numbers.
3. Make paper printouts of **all** electronic sources, including written notes of telephone interviews. Or make a backup electronic copy and store it in a Faraday cage.

**V. Be able to explain what to do when you do NOT find what you want and when you DO!**

A. When you **don't find it**

1. important to write "nil" or Ø in the *research log* results field, and . . .
2. look for the name again using a variant spelling, or . . .
3. select new record to search, or . . .
4. select new record type (see Record Selection Table *United States Research Outline* p. 5), or . . .
5. search a different jurisdiction (town, county, state, nation, or neighboring jurisdictions), or . . .
6. search a different repository (courthouse, library, genealogical or historical society, or archive).

**Note:** Avoid changing your objective or goal until you have exhausted the six possibilities above.

B. When you **do find it** (BEFORE you lay your head on your pillow:)

1. Photocopy the source.
2. Write footnote data in the margin on the front of the photocopy.<sup>4</sup>
3. Write on back of the photocopy your full document number (the number *you* create).
4. Finish your *log* by filling-in the document number and summarizing the results.
5. Transfer each piece of family history data from each new source to your family group record.
6. Cite ALL sources found for each event (even if the event already has a source footnote).<sup>5</sup>
7. Use the footnotes comment area to give a preliminary evaluation of the source.<sup>6</sup>
8. Print and file the updated family group record.
9. File the source photocopy.

**Key Underlying Principle:** Document and organize *as you go!*<sup>7</sup>

**VI. Be able to explain how to overcome a few note keeping pitfalls.**

- A. Start doing it this way from now on, but DON'T reorganize old research.
- B. Don't be discouraged if your files are not perfect. As you gain experience you are bound to improve on the system suggested in this lesson.

**Challenge: Select a Genealogical Quest**

- A. Set an overall goal for your research for the next several years.
- B. The goal should involve sharing **well-documented** (source footnoted) research, *for example*, publishing a family history, putting up a web site, or submitting to *Pedigree Resource File*.
- C. Share this research with genealogical societies where these ancestors settled.

<sup>4</sup> Elizabeth Shown Mills taught in class during Course 4 Advanced Methodology & Evidence, Institute for Genealogical and Historical Research at Samford University, Birmingham, Ala., 13-17 June 2005.

<sup>5</sup> Carol Harless, et. al., "Rules for Good Documentation," in Silicon Valley PAF Users Group *PAF Documentation Guidelines*, 1993 ed. (San Jose, Calif.: SVPUG, 1993), 1. Rule 4, "List all sources found."

<sup>6</sup> Mills, "Genealogical Mindset & Principles of Scholarship" (Lecture notes at IGHR, 2005), 4M2.

<sup>7</sup> Harless. Rule 1, "Document as you go."

### **Final Exam Discussion**

1. Which kind of data gathered by you as a genealogist is the most important? Why?  
(A) Names, (B) Dates, (C) Places, (D) Relationships, (E) Sources, or (F) RIN Numbers
2. Do you accomplish more good by:
  - A. extending your pedigree 5 generations (15 family groups) without citing sources, or
  - B. taking the same time to fully source footnote 1 family group record?  
*If the BEST researcher could not research all his ancestors, why not do YOUR part well?*
3. What role do *research logs* have in source footnoting and documentation?

**Homework:** Pick 1 ancestor and life event to hunt. Do at least 1 search and fill out a *log* until you write nil, or summarize the results. In 6 months ponder your experiment filling out *research logs* before viewing the source. Teach others about *research logs*. Choose a quest that shares well-documented genealogy.