



# NGS Monthly

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## TRACKING AND REPORTING OUR OWN RESEARCH

by Laura Murphy DeGrazia, CG



Life has a way of interrupting plans. While we are deep into work, focused on solving a genealogical mystery, a bump in the road could push us in another direction. We set our research aside, intending to restart as soon as we're able. But when we come back to work, the details that were fresh in our minds—names, places, dates, relationships, websites visited, records examined, databases searched—may be fuzzy or gone all together. Are we doomed to having to start again? If we have only hastily scribbled notes, random copies, and sketchy entries on family trees, chances are we'll have to redo at least part of the research. If, on the other hand, we've consistently and carefully tracked our work and written periodic

reports to our files, restarting will be easier.

Genealogists who conduct work for other people usually write reports detailing their efforts. Some write the reports as work progresses. Some use research logs to keep track of each step. Reporting and note-taking techniques used by professional researchers can be used by those of us who are working on our own projects—the reports will be for our own files.

A research log is a running record of searches. Examples can be found online, including in the *FamilySearch Wiki*. A log is usually in the form of a table, with each row devoted to a different step in the search. Contents of the columns depend on personal

preference, but each row should include full identification of the source, the reason for and results of the search, brief analysis, and implications for further work. Logs can include cross references to copies in our files. Tracking the sources used, why they were used, and what was found, helps organize our work. Research logs remind us of what we've already examined and what we found, saving us from accidentally conducting the same search more than once. Summaries of findings can jog our memories. If we are called away unexpectedly from our work, having a log that summarizes our research step by step can ease the return. When we are ready to start again, studying the log will remind us about the sources we used, why we used them, and what we found.

Research logs are handy for keeping track of work as it progresses, but eventually we should write a formal research report detailing our efforts. Reports include some of the same information we include in research logs, but they have more detailed explanations about findings, searches, reasoning, and conclusions. Some genealogists “write as they go,” preparing reports as they conduct work—in essence substituting the research log with frequent updates to the research-report file. Other genealogists keep notes and research logs then write a full report after reaching a logical place to take a break. Reading a detailed report will help us resume a project after some period of time has passed.

Examples of research reports can be found online. The “[Work Samples](#)” page at the Association of Professional Genealogists’s website includes three samples created and explained by Elizabeth Shown Mills. Mills’s Evidence Explained QuickLesson 20 covers “Research Reports for Research Success.” Professional Genealogy has a chapter on writing research reports.[1] While individual styles will vary, all reports should include some basic elements, such as[2]

- the person to whom the report will be issued—in this case, to ourselves or own files
- the report date and perhaps the range of dates during which research was conducted
- a description of the problem with starting-point information about its setting
- a list of repositories in which research was conducted
- a list of sources consulted (with full citations)
- an overview of the findings where key points are summarized and a final conclusion or hypothesis is stated

- detailed findings that include—for each source—full details of what was searched and what was found, difficulties encountered (if any), observations about the source, and other miscellaneous information
- discussions about source analysis, evidence correlation, and the conclusion or hypothesis
- copies of select documents, each carrying a full citation and cross-referenced to the body of the report
- suggestions for continued research

As we dig through records and explore online sources, it's easy to become so absorbed in our findings that we neglect to keep track of what we've examined, why we looked at it, and what we found. Making formal notes about our work is necessary and sensible. Disciplined researchers know that keeping research logs and periodically writing formal reports to our own files are valuable practices.

[1] Elizabeth Shown Mills, ed., *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians* (Baltimore: Genealogical Publishing Co., 2001), 348–78.

[2] For more information about research-report requirements, see Board for Certification of Genealogists, *Genealogy Standards* (Nashville, Tenn.: Ancestry.com, 2014), 38–39.

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Laura is a professional genealogist specializing in the New York City area and Irish Americans. She is a former trustee and past president of the Board for Certification of Genealogists. From 2010 through 2014 she edited the *New York Genealogical and Biographical Record* and became editor again in January 2018. Her book on researching in New York City, Long Island, and Westchester County, New York, was published as part of the *NGS Research in the States* series in 2013. Laura is a member of the NGS Magazine Editorial Advisory Committee and the NGS Publications Committee and a former editor of *NGS Monthly*.

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