

Getting Organized Using Technology and a Research Report

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Let's learn to use a research report and some digital organization to make progress!

What is a research report?

A research report is an organized, methodical, place to keep track of your research question or project.

Benefits of a research report:

- It's a roadmap for what you want to know and what you learned.
- It contains sources, citations, and important documents in one location.
- Share, share, share!
- For a digital research report, you can track everything to pick up later where you left off.

There are plenty of online templates for a research report.

Board for Certification of Genealogists (BCG) has genealogical work samples on their website.

<https://bcgcertification.org/learning/skills/genealogical-work-samples/>

Research reports

Case studies

Family histories

Client agreements

Association of Professional Genealogist (APG) has samples on their website from Elizabeth Shown Mills, *Evidence Explained*.

<https://www.apgen.org/cpages/sample-forms>

Analysis and Research Plan (analysis, strategies)

Research Report (execution of the plan)

Research Notes (contains all notes and findings)

Record Click gives a great overview of the hows and whys.

<https://www.recordclick.com/writing-familys-genealogy-report/>

A research report is a powerful investigative tool.

Things they recommend—

Choose your format

Define the scope

Research- focus on a question, organize, choose the starting point

Include sources, citations, and indexing

Personal Research Report for XXXXX

- Surname(s):
- Researched By: Kelli Bergheimer
Date:
- Research Objective/Question:
- Summary of Known Information:
- Repositories/Collections Used:
- Limitations:
- Summary of Findings:
- Itemized Findings:
- Next Steps:
- Bibliography of Records Consulted:

Family Tree Magazine has a blog post from Lisa A Alzo.

<https://www.familytreemagazine.com/premium/sample-research-plan>

List the objective.

List the known ancestor facts.

Form a working hypothesis.

Identify sources.

Implement research strategies.

Make it your own!

The Five Fs that can spell failure...

- Forgetting your own style and workflow
- Focus on famous genealogists
- Formal instead of functional
- Fancy footnotes
- Failing to start!

What documents go into (or are referred to in) your DNA report?

Excel files of:

Autosomal DNA matches from Ancestry, 23andMe, My Heritage, LivingDNA, Family Tree Family Finder, and GedMatch
y-DNA matches
mt-DNA matches

PDF files of:

Reports from tools
GedComs from GedMatch

Get organized!

Make a “start here” document to archive all of your decisions and to lead you back.

Make a folder for each project

