

Before You Click: Creating Your Online Research Plan

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Why take time to plan?

With thousands of ancestors to find, those working on their family history must make the most of their time.

Genealogists often find themselves buried in files from a recent Family History Library trip or a late-night visit to their favorite family history website. Research notes, scattered sticky notes, print-outs from online databases, and other materials are not often the most successful ways to research.



While an organization system is key to managing our research time correctly, taking other steps can ensure we maximize the time spent researching, analyzing, and compiling our family history. Proper time management ensures that we develop something to pass on to future generations of genealogists beyond a file cabinet stuffed with notes, pictures, documents, and other incomplete materials.

On average, for every hour you spend online, plan to spend at least two hours preparing to research, analyzing data, and compiling your results.

Initial Thoughts

Managing your online searching starts before you click the search button or enter the URL. To become a more effective online researcher, follow the following principles:

1. Keep a family history "golden rule."

On average, for every one-hour you spend in a library, plan to spend at least two hours preparing to research, analyzing data, and compiling your results.

2. Keep an updated research plan for websites.

Having a list of research tasks ensures you can maximize the few hours you get to spend on your family tree each week or month. Keeping a digital copy of this list allows you to quickly sort, share, and transfer this file between multiple devices.

3. Organize your digital life.

Sometimes, the need to quickly access research files, copies of documents, etc. can lead to one being more organized. Avoid a messy desktop and ensure copies of materials can be preserved (and found). Finding a systematic way of naming files and folders is also essential.

4. Develop an "after research" system

When returning home from a research trip or completing an online research session, it is crucial to create a step-by-step process that involves naming, storing, and organizing your files.

Expand Your Research Log

Keep a research log for **every site** you search – including subscription websites, search engines, or other resources. Once you have begun tracking these advanced categories and other websites on your research log, ensure you spent time examining your searches. Use your research log to become a more efficient online searcher - rather than just avoiding repetitious searches. Document the following on your online research log:

Search Parameters	Techniques
Domains	Quotations
File Types	Parenthesis
Language Settings	Asterisks
Website	Auto-Corrections
Subscription Level	Search Results
Date	Quantity of Results
Search Phrases	Summary of Results
Keywords	Results returned and examined

Develop Manageable Goals

Like any task, breaking family history into manageable pieces is key to managing your time and making an online research plan. Select a few specific research problems, individuals, or families to focus on at one time. Commit yourself to **producing something that can be shared** rather than merely filling out a pedigree chart or genealogical database for each of these tasks. This could include a short narrative on the family (which would later be combined with others to produce a book or digital publication) or adding information to a wiki page. Once selected, break your larger goals and the final product into smaller tasks by developing a research (or action) plan.

While it can be hard to "set-aside" a family or project or pick just a few families to focus on, avoid researching too many ancestors at once. Focusing on a specific goal (or small set of goals) provides time to adequately digest and understand historical and geographical contexts for a family, and can increase your efficiency at research.

For example:

Overall goal: Find the parents of Nathaniel Brown (b. ca. 1750, New York; d. 1794, Cornwall, Orange County, New York).

End goal: Write a short narrative of the search for Nathaniel Brown's parents, including their children and biographical information posted to a blog.

Online research project: Search compiled, printed resources that document births and families living in Orange County, New York between 1730 and 1750.

Specific Steps:

1. Identify potential records to search (likely online, in the Family History Library Catalog, the FamilySearch Wiki <wiki.familysearch.org>, the New York Genealogical and Biographical Society's Online Records Platform, the New York Knowledgebase, and elsewhere).
2. Search records online (time for "double-checking" records, making copies, and recording results).
3. Analyze results (time for comparing information found, developing future research plans, expanding goals, etc.)

Online research project: Gather historical context on Cornwall and Orange County, New York.

Specific Steps:

1. Identify potential resources (online, JSTOR articles, etc.).
2. Locate materials (either online or onsite at a library).
3. Gather and compile information (time to analyze data, compile a timeline, write a short narrative, etc.).

Prioritize

An essential part of your online research plan includes the ability to prioritize your research. Develop a system for prioritizing your research and incorporate it into your research logs. In many instances, when looking at the individual elements of a research project, it might seem logical to do complete some plans before others. For example, gathering historical and geographical context is nearly always necessary before actually searching in printed or original records.

Prioritize your research log **before** conducting research online. It is easy to become distracted by a fascinating individual, record source, or a particularly challenging research problem. Prepare for the unexpected as you complete your online research plan. Tracing information that is not part of your original list can be very beneficial, so long as you recognize that you are straying from your intended project. When this happens, **reprioritize** your task list, as needed, when your research takes you into unplanned territory.

Plan Ahead

To make the most of your research time, ensure you use your online time to prepare for onsite visits. Follow an institution's blog, Facebook, or other social media page to make

yourself aware of policy changes that might affect your visit. Ensure you have the proper documentation and identification needed when visiting a repository. If an institution requires membership, join before your visit – or have the paperwork already filled out upon your arrival.

Collaborate, Communicate, and Delegate

We can benefit from working with others who share common lines or research goals. Use social networking resources such as Facebook <facebook.com> to communicate and collaborate with other genealogists. Sharing your research log and additional notes through cloud-based services allows others a quick and easy way to add updates to your goals and task list.

You might find it useful to use friends and other genealogists as motivators to stick to your goals and plans. Posting updates on Twitter <twitter.com> or keeping a genealogy blog are easy ways to be "accountable" to yourself and others as you post and share your progress with fellow genealogists. If you do not wish to share with everyone, create a private blog or group that requires an invitation to join and only share updates with family, friends, cousins, or other genealogists.

Do not be afraid to **delegate** specific tasks to others. In some instances, you might delegate the task of searching a particular record set to a distant cousin, or to a librarian who has access to those records. A professional genealogist might be able to complete a task for you more efficiently than you could on your own.