



TOOLS OF THE TRADE

Timelines, Tables, Templates, & More!

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Basic genealogical tools help organize, analyze and understand information. These simple tools and techniques are powerful and effective, yet easy to master.

Genealogical Goals

- **Proof** of identities and kinship
- **Connections** of individuals to families, families to families, generations to generations
- **Reconstruction** of lives and times
- **Sharing** source-cited conclusions

Successful genealogists...

- **Plan**—determine available, relevant sources to answer questions
- **Research**—access sources, make copies, transcripts, abstracts, notes
- **Analyze** sources, information, evidence—before, during, and after the research process
 - Comparing & contrasting results
- **Record**—information during research, record usable data in family project
- **Write**—final, source-cited results, share
- **Cite**—record information about all sources consulted, connect useful evidence to sources

The Genealogist's Toolbox

- Family group records, pedigree charts, genealogy databases
- Timelines
- Research plans
- Research logs
- Correlation aids: tables, charts, graphs
- Formatted document images, transcriptions, abstracts
- Written, source-cited conclusions

Toolbox options

- Pencil-to-paper forms, templates
- Genealogical software/specialty software/apps
- Make-your-own word-processing tools/templates
- **Workable compromise:** generate tools in genealogical software, export to word processor as “rich text format” (.rtf) for customization.



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TIMELINES

Timelines are *lifelines*—chronological pictures of life events for an individual/family/generation.

- May span a lifetime, or a specific stage of life
- Provide **context** for ancestral actions—help determine motivations, patterns
- Locational timelines integrate events of the era
- Highlight gaps, inconsistencies
- Analysis assists with research planning
- Useful for writing family stories

Your ancestor's timeline should state his/her name in the heading. Essential columnar information:

- **Date of event:** Year in separate column; Day/Month
- **Age** of subject individual at the time of the event
- **Name**, and names of individuals relevant to the event
- **Event:** life events, relevant historical context
- **Location** of event
- Include **source citations** for each event.

Get the most from timelines:

- Color code changes of location to highlight patterns of movement.
- Does lifeline make sense? Have all relevant sources been consulted? Are sources reliable?
- Can you account for every year of your ancestor's life? What new sources might fill gaps?
- Incorporate historic events that might influence your ancestor's actions.

RESEARCH PLANS

Every research plan begins with analysis of existing information. Identify gaps, inconsistencies, and unreliable sources. What questions need answers? Determine what sources might contribute to resolving questions and how/where you will access those sources. Successful research plans are founded on a clear understanding of the **times** and **locations** identified in your ancestor's timeline.

- **Prioritize** and address specific questions one at a time.
- What relevant sources were created in that time and place?
- Have boundaries or jurisdictions changed? Where might sources be found now?
- Incorporate government and non-government sources into your plan.
- Determine a strategy to access the records: online, on microfilm, in person, outsourced.

Put it in writing! Key elements for research plans:

- Identify the research subject in the heading.
- List sources to search, include date ranges.
- List locations (jurisdictions) to search.
- State how/where you will access the records.

Get the most from research plans:

- Organize plans logically: By record groups, time periods, jurisdiction, access.
- Prioritize quality, original sources with reliable informants.
- Collect information about each source *before* you begin the search.
- Consider using a **combination research plan/research log**.

RESEARCH LOGS

The **research log** is a permanent record of your project. Logs can be created for individuals, families, locations, or record groups. Goals for research logs:

- Keep the research log in front of you *during the research process*. Make notes as you go along!
- Record information for each source consulted. What were you looking for? What did/didn't you find? Note negative searches.
- Record information about the source itself. Elements for creating source-citations:
 - **Who** created/authorized the source?
 - **What** is the source?
 - **When** was the source created (Usually the date of the event)?
 - **Where within** the source did you find your ancestor? "Internal locators": page numbers, entry/license numbers, name of individuals.
 - **Where is** the source? How did you access it?
 - Any unique characteristics? Faded inks, foreign language, missing/damaged pages.

Get the most from research logs:

- **Analyze** and record information *during the research process*. Who supplied information—are they credible? Does the source contribute directly or indirectly to answering the research question?
- What next-steps need to be taken? Create a new plan based on what you've learned.

CORRELATION TOOLS

Timelines are one way to visualize, compare, and contrast data. Re-arranging data in different ways can lead to new perspectives and clues, especially for complex problems. Visualization tools include tables, charts, and graphs. Get the most from correlation tools:

- Use side-by-side timelines and records comparisons in analysis of same-name individuals.
- Compare and contrast data – watch for patterns, inconsistencies.
- Use color to highlight similarities, locations, movements, or other patterns.

DOCUMENT FORMATS

Always try to get copies of original document images: download, scan, or photocopy.

- Include source-citations with each image.
- To glean the most information from each document, create source-cited transcriptions and abstracts.
- Store images and transcriptions with subject individuals/families.

SOURCE-CITED, WRITTEN CONCLUSIONS

Your genealogical software can connect facts to their sources, and generate numbering systems, but it cannot write your family story for you. Take advantage of word-processing tools to write readable, source-cited genealogies and narratives.

- Export genealogical reports, narratives as "rich text format" (.rtf) from genealogical software to word processor for formatting. Once set up, "Write as you go."
- Word-processors automatically generate footnotes, endnotes, tables of content, and indexes.
- Writing from scratch? Format genealogical numbering last!

DO-IT-YOURSELF TEMPLATES

Don't settle. Word-processing tools offer more flexibility than genealogical software, and can be customized to suit your needs. Design your own templates to streamline the research process and create consistent, attractive printed work. Microsoft Office is available for PCs and Macs; other software options are also available.

- Save templates as **.dotx** in their own folder, within the family tree file on your computer.
- Double-click templates to open new document, save under new label for specific use.
- For consistent presentation, incorporate Styles, use Format Painter, or consistently select specific fonts, paragraph spacing, etc.
- Use headers, footers for titles, subject headings, revision dates, pagination.
- “Freeze” top rows of tables and spreadsheets to display on each page.

Here's how I create and use templates with Microsoft Office software:

Word (word-processing documents)

- **Tables** for timelines, research plans, research logs.
- I prefer a combination **research plan/research log**. Organize the plan/log by categories. Add or delete extra rows. Useful categories:
 - Birth, Marriage, Death (or combine as Vital Records)
 - Census/Residence
 - Land & Property
 - Taxes & Voter Lists
 - Will/Probate/Court
 - Immigration/Naturalization
 - Military
 - Church/Cemetery
 - Education/Occupation
 - Newspapers & Directories
 - Personal Documents
 - Histories & Books
 - Maps & Plats
 - Photos & Images
- Create table-based **specialty templates**: property worksheets, proof summaries, research citations, bibliographies.
- **Narrative presentations**: cover pages, tables of content, narrative bodies, footnotes, endnotes, indexes
- **Labels**—store manufacturer templates for insertable tabs, file folder labels

Microsoft Publisher

- Source-cited document images, transcriptions, abstracts
- Special charts, graphs, maps
- Notebook cover and spine inserts

Excel spreadsheets

- Research plans and logs, extensive timelines, correlation of large bodies of data
- Databases for surveyed indexes, property records, tax records
- “Insert Comments” for source citations; “Conditional Formatting” for special rules
- Sort & filter results, incorporate color

RESOURCES

All URLs valid as of 1 January 2021

Download and Print Genealogical Forms (Free!)

1. *Ancestry.com*. <http://www.ancestry.com/trees/charts/ancchart.aspx>
2. *FamilySearch Wiki*. https://www.familysearch.org/wiki/en/Genealogy_Research_Forms
3. *Family Tree Magazine*. <https://www.familytreemagazine.com/freeforms>
4. *Midwest Genealogy Center*. <https://www.mymcpl.org/genealogy/resources/family-history-forms>. Fillable.
5. *National Genealogical Society*. <https://www.ngsgenealogy.org/free-resources/charts>. Fillable.

Genealogical Software/Charts

6. Top Ten Reviews. *Best Genealogical Software of 2019*.
<https://www.toptenreviews.com/best-genealogy-software>
7. Mackiev.com. *FamilyTree Maker 2019*. <https://www.mackiev.com/ftm> . Rated best for beginners.
8. Millennia. *Legacy Family Tree 9.0*. <http://www.legacyfamilytree.com>
9. Lester Productions. *Reunion12*. <https://leisterpro.com>. Compatible with Apple Macintosh computers.
10. RootsMagic, Inc. *RootsMagic 7*. <https://www.rootsmagic.com>
11. Family Tree Prints. <https://familytreeprints.com> . Design & download print-ready charts.
12. FamilyChartmasters. <https://familychartmasters.com> . Chart printing service.

Specialty software

13. Arons, Rod. *Mind Maps for Genealogy*. Criminal Research Press, 2014. <http://www.RonArons.com>
14. Evernote. <https://evernote.com>
15. Freemind. *SourceForge*. http://freemind.sourceforge.net/wiki/index.php/Main_Page
16. Literature & Latte Ltd. *Scrivener*. <https://www.literatureandlatte.com/scrivener/overview>
17. *ResearchTies*. <https://researchties.com>. Research tracking, logs.
18. XMind. *XMind Ltd*. <http://www.xmind.net>

Organizational apps

19. *Any.do*. <https://www.any.do>. To-do lists, calendars, reminders, planners.
20. *Hours Tracker*. <http://www.hourstrackerapp.com>. Measure productivity through time tracking.
21. *Trello*. <https://trello.com/en>. Organize and collaborate.
22. *Workflowy*. <https://workflowy.com>. Lists and note-taking app.

Word Processing Software

23. Microsoft. *Microsoft Office*. <https://www.microsoft.com/en-us> Products include Word, Excel, Publisher, OneNote, and other applications. A Mac compatible version is available.
24. Softmaker. *FreeOffice 2018*. <https://www.freeoffice.com/en>. For Windows or Macs.
25. The Document Foundation. *LibreOffice*. <https://www.libreoffice.org>. Free. For Windows or Macs.

Helpful publications

26. Eichholz, Alice, ed. *Redbook*, 3rd ed. Provo, UT: Ancestry, 2004.
27. Hendrickson, Nancy. *The Genealogist's U.S. History Pocket Reference: Quick Facts & Timelines of American History to Help Understand Your Ancestors*. Cincinnati: Family Tree Books, 2013.
28. *Legacy Family Tree Webinars*. <https://familytreewebinars.com> . Subscription.
Series *Microsoft Word* by Thomas MacEntee.
Series *Spreadsheets: Excel* by Mary Kircher Roddy.
29. Smith, Drew. *Organize Your Genealogy: Strategies & Solutions for Every Researcher*. Cincinnati: Family Tree Books, 2016.

Timeline example

| Elmira Bonnett Timeline | | | | | |
|-------------------------|--------|-------|--|-----------|--|
| Date | Age | Names | Event | Location | |
| 1841 | 25 May | 0 | Elmira Bonnett dau. of Samuel Bonnett & Lucinda Hooe ¹ | birth | Lewis Co., (W) VA ² |
| 1847 | | 6 | Samuel Bonnett family | migration | from WVA to Greene Co., OH ³ |
| 1850 | 1 June | 9 | Elmira Bonnett in Samuel Bonnett household | census | Silver Creek Twp., Greene Co., OH ⁴ |
| 1850 | autumn | 9 | Samuel Bonnett household | migration | to Mahaska Co., IA ⁵ |
| 1856 | | 15 | Elmira Bonnett in Samuel Bonnett household | census | Jefferson Twp., Mahaska Co., IA ⁶ |

Research Plan example

| Research Plan: What happened to Henry H. Myers? | | | | | |
|---|----------------|-----------------|--|--|-------------|
| Elmira Bonnett b. 25 May 1841 WVA d. 31 Jan 1924 IA | | | Spouses: (1) Henry Myers? (2) Nicholas Charles Hoit | | |
| Done | Individual | Location | Search Details | Access | Dates |
| Census | | | | | |
| | Henry H. Myers | Mahaska Co. IA | Iowa & federal population schedules | <i>Ancestry</i> or <i>FamilySearch</i> | 1856 - 1870 |
| Military | | | | | |
| | Elmira Hoit | Federal service | Civil War widow's pension Nicholas C. Hoit service | NARA—Washington, D.C. | 1904 - 1924 |
| | Henry H. Myers | Mahaska Co., IA | Militia rosters | <i>FamilySearch</i> | 1861 - 1865 |
| | Henry H. Myers | Iowa | IA Adjutant General Civil War enlistments | State Historical Society, Des Moines | 1861 - 1865 |
| Cemetery | | | | | |
| | Henry H. Myers | Mahaska Co., IA | WPA Burials | IAGenWeb Project | 1863 - 1866 |
| | Henry H. Myers | Mahaska Co., IA | Compiled cemetery records | Keomah Gen. Soc., | 1863 - 1866 |

Research Plan/Log example

| Elmira Bonnett Research Plan/Log | | |
|---|--|--|
| Elmira Bonnett b. 25 May 1841 WVA d. 31 Jan 1924 IA | | Spouse: (1) Henry Myers (2) Nicholas Charles Hoit |
| Done | Source Citation/Results | Source ID/Author |
| | Birth | |
| | Marriage | |
| x | Mahaska Co., IA, Marriage Register, vol. 3 (1856—1864), p. 142, Myers-Bonnett (1863); Recorder's Office, Oskaloosa; | FHL 985,381 |
| x | Mahaska Co., IA, Marriage License & Certificate, Hoyt-Bonnett, 1866, bride's copy; photocopy privately held by Alice Hoyt Veen, Bouton, Iowa, 2013. Photocopy provided by Jack Hoyt in 2009. He did not recall who provided the copy. | |
| | Death | |
| x | Marshall Co., IA, Death Register, Book 5:122 Mrs. Elmira Hoit (1924); Recorder's Office, Marshalltown; | FHL 1,753,295 |
| | Census/Residence | |
| x | 1856 IA state census, Mahaska Co., population schedule, Jefferson Twp., p. 886, dwelling 55, family 57, Samuel Bonnett; | Sec. of State, SHSI - DM |
| | Will/Probate/Court | |
| | Civil Order books, Circuit Court, Putnam County, Indiana, vols. 5-6, Apr 1, 1861 - Oct 12, 1867 search Henry H Myer divorce 17 June 1865 | FHL 2,414,739 |
| | Military | |
| x | Elmira Bonnett Hoit, widow's pension no. 606,889; service of Nicholas C. Hoit (Pvt., Co. C, 7th Iowa Vol. Inf., Civil War); Case Files of Approved Pension Applications..., 1861—1934; Civil War and Later Pension Files; Department of Veteran Affairs, Record Group (RG) 15; National Archives, Washington, D.C. | |

To-do in red
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