Research plans, Source Citations, and Research logs, oh My!

Diana Elder AG
• Please silence all electronic devices
• No audio or video recording
• No photos
https://familylocket.com/rootstech/

- Presentation slides
- Research Log template
- Cheat sheets
- Family Locket Booth #1743
- Research Like a Pro e-Course coupon
Class Outline

- Georgia Dawson Case Study
- Research Planning
- Source Citations
- Research Logs
The Genealogy Research Process

1. Objective
2. Timeline Analysis
3. Location
4. Research plan
5. Source Citations
6. Research Logs
7. Write conclusions
Research Planning
Why a Research Plan?

• Efficient use of research time
• Search the best records first
List the Research Objective
1. Objective

- Prove identity or relationships or discover actions

- Key identifiers: birth, death, and marriage dates and places and known relationships
Georgia A. Dawson, 20 Feb 1856, Will Book 2 p. 239
   Dau: Lilly Dawson
   Brother: A. L. Lewis
   Sisters: Mary L. Lawton, Sarah M. Lawton
   Nieces: Mary Royston, Sarah Royston

John DeLacy, 10 Oct 1888, Will Book 3 p. 191
   Sons: John M. DeLacy, R. E. DeLacy
   Daus: Amelia DeLacy, Erin G. DeLacy, Kathleen M. DeLacy
   Grandson: Thomas DeLacy Tollman

Marilee Beatty Hageness, "Abstract of Wills 1838-1900
   Russell County, Alabama, (Anniston, Alabama: MHT Research
   1997), 9. FHL G76. 1485 P.26
Example objective:

The objective of this research project is to identify the parents of Georgia A. (Lewis) Dawson. Georgia’s will was dated 1856 in Russell County, Alabama.
Summarize the Known Facts
2. Summarize the Known Facts

- Create a timeline
- Assemble sources
- Enter information
- Analyze events
- Make a list of research ideas
Known Facts for Georgia A. Dawson

- Died in Russell County, Alabama 1856
- Born about 1836
- Possible maiden name of Lewis
- Daughter: Lilly Dawson
- Sisters: Mary L. Lawton and Sarah M. Lawton
- Nieces: Mary Royston and Sarah Royston
• What information could answer the objective?

• Work from the known to the unknown
Understand the Locality
Jurisdictions

- Government or church entity that created records
- Different levels: town, state, county, national, etc.
- Church levels: parish, diocese, etc.
Russell County on the state line of Alabama and Georgia

Identify Sources for the Location and Time Period
# Italy Record Finder

This table can help you decide which records to search using the following steps:

**Step 1. In column 1, find your goal.**

**Step 2. In column 2, find the types of records most likely to have the information you need.**

**Step 3. In column 3, find additional records that may be useful.**

<table>
<thead>
<tr>
<th>What you are looking for:</th>
<th>Try these records first:</th>
<th>Other useful records:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>Census, Civil Registration, Church Records</td>
<td>Military Records</td>
</tr>
<tr>
<td>Birth date and birthplace</td>
<td>Civil Registration, Church Records</td>
<td>Military Records</td>
</tr>
<tr>
<td>Boundaries (parish, district, county, province)</td>
<td>Gazetteers, Historical Geography</td>
<td>Maps, History</td>
</tr>
<tr>
<td>Country of foreign birth</td>
<td>Church Records, Census</td>
<td>Emigration and Immigration, Military Records</td>
</tr>
<tr>
<td>Death information</td>
<td>Civil Registration, Church Records</td>
<td>—</td>
</tr>
<tr>
<td>Emigration information</td>
<td>Emigration and Immigration, Census</td>
<td>Military Records</td>
</tr>
<tr>
<td>Historical background</td>
<td>History, Genealogy</td>
<td>Maps</td>
</tr>
<tr>
<td>Language helps</td>
<td>Language and Languages</td>
<td>Encyclopedia and Dictionaries</td>
</tr>
<tr>
<td>Living relatives</td>
<td>Directories, Civil Registration</td>
<td>Societies, Periodicals</td>
</tr>
<tr>
<td>Maiden’s name</td>
<td>Civil Registration, Church Records</td>
<td>—</td>
</tr>
</tbody>
</table>

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**Italy Research Topics**

- Research Strategies
- Record Finder
- Finding Place of Origin

**Beginning Research**

- Census
- Church Directories
- Church Records
- Civil Registration
- Court Records
- Directories
- Emigration & Immigration
- Genealogy
- Heraldry
- Military Records
- Nobility
- Notarial Records
- Occupations
- Online Records
- Other Records
- Periodicals
- Place of Origin
- Probate
Learn about the important record types for your locality – major clues for research planning

https://www.icapgen.org/become-accredited/testing-regions/
Russell County, Alabama Genealogy

United States → Alabama → Russell County

Guide to Russell County, Alabama ancestry, family history, and genealogy: birth records, marriage records, death records, census records, family history, and military records.

Alabama Online Records

Contents

1 County Information
   1.1 Russell County, Alabama Record Dates
2 County Courthouse
   2.1 Description
3 History
   3.1 Parent County
   3.2 Boundary Changes
   3.3 Record Loss
4 Places/Localities
   4.1 Populated Places
   4.2 Neighboring Counties
5 Resources
   5.1 Cemeteries
   5.2 Census
   5.3 Church Records
   5.4 Court Records
   5.5 Land and Property
   5.6 Local Histories
   5.7 Maps
Notes
Russell County was created by act of the state general assembly on 18 December 1832 from lands ceded to the state by the Creek Indians. County seat: Girard (1833-1839), Crawford, originally Crockettsville (1839-1868), Seale (1868-1935) and Phenix City (1935-present).
Part of United States, Alabama

Places within United States, Alabama, Russell
- United States, Alabama, Russell - Cemeteries (5)
- United States, Alabama, Russell - Census - 1840 (2)
- United States, Alabama, Russell - Church records (2)
- United States, Alabama, Russell - Genealogy (2)
- United States, Alabama, Russell - Guardianship (1)
- United States, Alabama, Russell - History (5)
- United States, Alabama, Russell - Land and property (1)
- United States, Alabama, Russell - Military records (1)
- United States, Alabama, Russell - Military records - Pensions (1)
- United States, Alabama, Russell - Probate records (8)
- United States, Alabama, Russell - Probate records - Indexes (1)
- United States, Alabama, Russell - Vital records (5)
4. Identify Sources

Understand the record types!

- Their content
- Their availability
- Their coverage of dates and geographic areas
Ideas to Search for Georgia A. Dawson

- Marriage record for Georgia A. Lewis and a Dawson
- 1850 census records
- Original probate records
- Cemetery records
- Marriage records for sisters
Step 5: Prioritize the Research Strategy

- **Check**: Check online records first
- **Start**: Start with the record most likely to answer your research question
- **Plan**: Plan searches in specific databases
“The correct records for the area and time period are used in an appropriate manner, and they are used in a logical order.”

Specific research planning questions in both 2-hour tests:

- General Questions
- Document Interpretation
The objective of this research project is to identify the parents of Georgia A. (Lewis) Dawson. Georgia’s will was dated 1856 in Russell County, Alabama.

1. Search marriage records for Georgia Ann (Lewis) and a Dawson spouse – Georgia or Alabama.

2. View the original probate file. Look for other family members.

3. Search the 1850, and 1860 census records for Dawson and Lewis families.


5. View additional probate records for a possible father for Georgia.
Why should you cite your sources?

- To evaluate and analyze each source located
Why should you cite your sources?

- Prove your research findings and analysis
Why should you cite your sources?

- Relocate the source and enable others to locate the source
“Ethics, copyright laws, and courtesy to readers require authors to identify the sources of direct quotations and of any facts or opinions not generally known or easily checked.”

Source vs. Source Citation

What’s the difference?
What is a Source?

A document, book, article, microfilm, photograph, website, etc. that gives you information, which becomes evidence in proving a conclusion.
What is a Source Citation?

A statement identifying the specific location of a source and details about that source.

Choose a Style


Understand the Source
Step 2: Understand the source
Layered Citations

The term coined by Elizabeth Shown Mills to describe digital sources that contain digital images of original records.

Layered Citations

- Include both the physical source citation, then all the digital source citation information, separating the two sections with a semicolon.

- A third section might be necessary if referencing the original microfilm reproduction of the source.
Create a Citation

1. Author - Who
2. Title - What
3. Publication - When
4. Location – Wherein and Where is
Author of the source
Who?

The author of an article, book, or other publication

The creator of a record; often a religious or government entity

The informant in an interview
Published works: books, articles, journals, websites are italicized

Unpublished works: a personal history, interview, collection of loose papers, birth registration book, online database - use quotes around the title or if not titled describe the record.
Title / Description or what is the source

Published source: cite the year of publication; for a journal or magazine, add the month or season. Website: add the access date. Because URL’s change, the date could help to relocate the source.
Publication of the source – WHEN?

Unpublished source: use the date of creation, the date of the event it reports, or both.
Publication of the source or when did the event happen?

Location of the source within a book or database – WHERE?

Published source: a volume or page number

Online database: cite the image number or waypoints
Government certificate - document number

Unpublished source - identify an order and describe it: “folio 3, page 25”
Location of the source - where within a collection

Location where the source can be accessed or viewed

Published source: place of publication

Website: URL

Unpublished source: where the source can be viewed
Location
where the
source can
be accessed
or viewed

Tips for Accreditation Candidates:

- No specific style format is required, but be consistent with style formats throughout the project

- Create a citation template, especially for commonly used sources such as a census
Tips for Accreditation Candidates:

- Citations in the report, research log, family group sheet, pedigree sheet, and documents should match.

- Avoid cutting and pasting from websites with improper templates.
Tips for Accreditation Candidates:

- Create the citation in the research log then copy and paste into the genealogy database, the research report, and the front of the document.
Tips for Accreditation Candidates:

▪ Include citations for negative searches.

▪ Once the report or article is complete, create the shortened citations.
“Careful attention to the style and content of citations . . . is the badge of an advanced genealogical researcher.”

- Harris, “Documentation and Source Citation,” 178.
Research Logs
What is a research log?

A record of what you are looking for, where you looked, and what you found.
Why Use a Research Log?
Why use a research log?

- Track positive and negative searches
- Note the date a database was searched
Why use a research log?

- Create source citations to be used other places
- Show at a glance what has been found
Why use a research log?

▪ Evaluate information and evidence

▪ Be more productive and efficient in research
Why use a research log?

- Avoid duplication of effort
- Break through brick walls with better record keeping
The Electronic Research Log

- Create in a table format or a spreadsheet
- Have multiple pages in a single spreadsheet
- Sort columns in a spreadsheet to view specific searches
<table>
<thead>
<tr>
<th>DATE</th>
<th>REPOSITORY</th>
<th>SEARCHING FOR</th>
<th>LOCALITY</th>
<th>SOURCE CITATION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><a href="http://ancestry.me/2rVSNGJ">http://ancestry.me/2rVSNGJ</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Multi-page Research Log - Spreadsheet

<table>
<thead>
<tr>
<th>Date</th>
<th>Source</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 Nov 2016</td>
<td>Morgan County Archives</td>
<td>Property Tax Record for Thomas B Royston in Morgan Co., Georgia</td>
<td>Morgan County, Georgia. Superior Court, 1831 Tax Digest, page 2, entry for Thomas B. Royston, Morgan County, Archives, Madison, Georgia.</td>
</tr>
</tbody>
</table>

Add a page for each generation or family member.
The Electronic Research Log

- Keep in your computer files with each ancestor or family
- Cut and paste information from websites
- Add links to online records
Categories for a Research Log
Categories for a Research Log

Date
Repository
URL/Call#/Microfilm#

Searching for
Locality
Source citation

Results/comments
The objective of this research project is to identify the parents of Georgia A. (Lewis) Dawson. Georgia’s will was dated 1856 in Russell County, Alabama.

1. Search marriage records for Georgia Ann (Lewis) and a Dawson spouse – Georgia or Alabama.
2. View the original probate file. Look for other family members.
3. Search the 1850, and 1860 census records for Dawson and Lewis families.
5. View additional probate records for a possible father for Georgia.
Example:
John H Dawson and Georgia Ann Lewis, married 4 February 1850 by John E Dawson; Russell County, Alabama

List the date the search was performed.

Some databases are updated periodically and need to be rechecked at a later date.

Date: 6 Mar 2018
▪ Record the website, library, archive, or other physical location that holds the source.

▪ The repository could be your own files if it is an inherited letter or document.
- Copy and paste the URL, use Bitly.com to shorten

- The unique call # or microfilm # at a library or archive

URL/Call#/Microfilm#
http://bit.ly/2mNTL6b
- List the specific search: record type and name
- Sort by this column to organize by record type

Searching For:
Marriage record for Georgia A Dawson
- List the specific locality: city, county, state or country
- Sort by this column to organize by locality

Locality: Russell County, Alabama
Create the first time a source is viewed

Add all details about a source

Source Citation:

Results / Comments:

John H Dawson and Georgia Ann Lewis, married 4 February 1850 by John E Dawson; Russell County, Alabama
Negative Results / Comments:

NIL Searched for Lewis-Dawson marriage in Georgia, 1845-1855
- Match document numbers between the research log, report, family group records, and documents

<table>
<thead>
<tr>
<th>Source</th>
<th>Results/Comments</th>
</tr>
</thead>
</table>

Document Number: 1
Add document numbers as the last task in writing the report

Marriage of Georgia A. Dawson

A search of Alabama marriage records revealed the marriage of John H. Dawson and Georgia Ann Lewis, married 4 February 1850 by John E. Dawson. The young couple was living in the household of John E.

---

Attach the source citation and document number to each document submitted with the report.


Document 1
Research Logs in the Accreditation Process

- **Level 1: Research log for the 4 Generation Project**
- **Level 3: Research Log for the 4 Hour Final Project**
Reaching the Research Objective by Following the Research Plan, Creating Source Citations, and Keeping the Research Log
The estate file contained 17 images and included the will of Georgia A. Dawson, witness statements, inventory and appraisement of the estate, record of the executor’s sale, and final administrative documents.
Abstract Will Information and add to Results/Comments Column

- My only child, Lily Dawson; commit to care of brother O.L Lewis

- If Lilly Dawson should die without marrying and before she is twenty one years of age, the afore mentioned property to be divided into four parts equally between my sisters:
  - Sarah M. Lawton, Mary L. Lawton, Savannah N Buford
  - The fourth part between my two nieces Sarah and Mary Royston, my eldest sisters two daughters by her first Husband
Trustee O.L. Lewis “to buy three marble slabs to be placed over the graves of my mother, step-mother, and myself. First removing the remains of my stepmother and my two children from their present burial place. To where my own mother is buried and in one grave place myself and two children with a marble slab over us.”
What Do We Know?

- Mary Royston
- Sarah Royston
- O. L. Lewis
  - ? (Lewis) Royston
  - Sarah M. (Lewis) Lawton
  - Mary L. (Lewis) Lawton
  - Savannah N (Lewis) Buford
- Georgia Ann Lewis
  - John H. Dawson
  - Lilly Dawson
  - ? Dawson
  - ? Dawson
- Mother Lewis
- Stepmother Lewis
Objective: The objective of this research project is to identify Georgia Ann (Lewis) Dawson, died 1856 Russell County, Alabama.

1. Search marriage records for Georgia Ann (Lewis) and a Dawson spouse – Georgia or Alabama.

2. View the original probate file. Look for other family members.

3. Search the 1850, and 1860 census records for Dawson and Lewis families.


5. View additional probate records for a possible father for Georgia.
1850 census Russell County, Alabama


Noland Lewis 59
Martha Lewis 55
Sarah Lewis 18
Mary Lewis 16
Savannah Lewis 14
James M Creo 40
1850 census Muscogee County, Georgia

1850 U.S. Census, Muscogee County, Georgia, population schedule, Columbus, p. 333 B(stamped), dwelling 624/44, family 704/3, John E Dawson household; digital image, Ancestry (http://www.ancestry.com: accessed 7 March 2017); citing NARA microfilm publication M432, roll 79.

John E Dawson 45
Mary Dawson 33
John W Dawson 23
Mrs. Georgia Dawson 20
Alexander Dawson 17
What Do We Know?

- Mary Royston
- Sarah Royston
- O. L. Lewis
- ? (Lewis) Royston
- Sarah M. (Lewis) Lawton
- Mary L. (Lewis) Lawton
- Savannah N (Lewis) Buford
- Noland Lewis
- Mother (Martha?) Lewis
- John H. Dawson
- Georgia Ann Lewis
- Lilly Dawson
- ? Dawson
- ? Dawson

Diagram: Family tree showing relationships among the named individuals.
1860 U.S. Census, Macon County, Alabama, population schedule, Southern Division, p. 801 (stamped), dwelling 624/44, dwelling 745, family 744, John W Dawson household; digital image, Ancestry (www.ancestry.com : accessed 7 March 2017); citing NARA microfilm publication M653.
Cemetery Record Search

Phyllis East, *Sacred to the Memory of the Ancestors of Russell County, Alabama*, (Opelika, Alabama : Genealogical Society of East Alabama, 1999); FHL 976.1485. V3e.


No results; searched for Lewis and Dawson
Will of Pearce L Lewis: father Pearce A Lewis; uncle Nolen R Lewis, cousins Jacob G Lewis and Olwen L Lewis executors and guardians of children; Witnesses William Plane, Battle A Sorsby, Seaborn Jones

Obituary for Mrs. James S. Lawton

Mildred Ann Lewis

Parents Richard Nolan Lewis and Sarah Gibson Lewis

Married Dr. George Duffield Royston of Maryland

Left a widow with two girls – Mrs. H.H. Cabaniss and Mrs. J.T. White

Married secondly to Dr. James Lawton

What Do We Know?

- **Sarah Gibson**
- **John H. Dawson**
- **Mildred (Lewis) Royston**
- **Sarah M. (Lewis) Lawton**
- **Mary L. (Lewis) Lawton**
- **Savannah N (Lewis) Buford**
- **Olwen L. Lewis**
- **Noland / Nolen R. Lewis**
- **Georgia Ann Lewis**
- **Mary Royston**
- **Sarah Royston**
- **Mary Royston**
- **Mary Dawson**
- **John Dawson**
- **John H. Dawson**
- **Stepmother Martha**
- **Mother Sarah Gibson**
- **Savannah**

**Jacob G. Lewis**

**Mary L. Lewis**

**Olwen L. Lewis**

**Mildred (Lewis) Royston**

**Sarah M. (Lewis) Lawton**

**Mary L. (Lewis) Lawton**

**Savannah N (Lewis) Buford**

**Georgia Ann Lewis**

**Mary Royston**

**Sarah Royston**

**Mary Royston**

**Mary Dawson**

**John Dawson**

**John H. Dawson**

**Stepmother Martha**

**Mother Sarah Gibson**

**Savannah**

**Mary L. Lewis**

**Olwen L. Lewis**

**Mildred (Lewis) Royston**

**Sarah M. (Lewis) Lawton**

**Mary L. (Lewis) Lawton**

**Savannah N (Lewis) Buford**

**Georgia Ann Lewis**

**Mary Royston**

**Sarah Royston**

**Mary Royston**

**Mary Dawson**

**John Dawson**

**John H. Dawson**

**Stepmother Martha**

**Mother Sarah Gibson**

**Savannah**
Georgia Ann (Lewis) Dawson Research Log

26 Entries → Date searched → Repository

Locality of search ← Search specifics ← Urls – Links

Complete source citations ← Results
<table>
<thead>
<tr>
<th>Date</th>
<th>Repository</th>
<th>URL, Call #, Film #</th>
<th>Searching For</th>
<th>Date</th>
<th>Locality</th>
<th>Source</th>
<th>Results/Comments</th>
</tr>
</thead>
</table>
The Genealogy Research Process

1. Objective
2. Timeline Analysis
3. Location
4. Research plan
5. Source Citations
6. Research Logs
7. Write conclusions
Make the most of your research efforts by creating and following a research plan, creating source citations as you research, and keeping a research log!
Remember to give feedback in the app!

- Go to session RT6783 in the RootsTech Mobile App
- Tap the “Clipboard” icon
- Rate the presentation
QUESTIONS???

https://familylocket.com/rootstech/

- Presentation slides
- Research Log template
- Cheat sheets
- Family Locket Booth #1743
- Research Like a Pro e-Course coupon