Did I Get Everything?
A Checklist for Online Genealogy Research

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While most genealogists endeavor to perform a "reasonably exhaustive search" to prove specific data points in their research, is it really possible to "cover all the bases?" How can you be certain that you didn't miss a record set especially in an area of research that is new to you? Assuring yourself that your research is thorough is easier when you develop a checklist and you approach resources with a new perspective.

What Am I Missing? Identifying Gaps in Your Genealogy Research

While the task of determining "missing areas" of research can be daunting, it gets easier the more you research. You tend to get into a "groove" and tell yourself, "Oh, don't forget to use _____ as a resource" or, "Remember when _____ website helped with a similar problem?" Here's how to track all the gaps as well as helpful resources:

- **Research Log**: Create your own tracking system so you know what resources you've already used. A basic list consists of the date research performed, the record or record set, the results, analysis or evaluation of the results, and a source citation. Some genealogy database software such as **Legacy Family Tree** contain "to do lists."

- **Timelines**: One of the best ways to visualize "gaps" is to use a timeline. You can create one manually by sketching it out on paper or digitally. Also check your genealogy database software program to see if your research data can be rendered into a timeline report. Also consider timeline websites such as **Timetoast** where you enter events and dates and you can see historical events which influenced your ancestors' migration.

- **Software**: "Helper" programs like **Evidentia** can be used to analyze a GEDCOM file of your research and find errors and also note gaps and suggest resources for research.

- **Mind Mapping**: Again, the challenge of visualizing what's been researched and what is left to do can be accomplished using mind mapping programs such as **Popplet**. Use shapes, lines, and colors to sort out completed research from your "to do" list.

Crafting a Genealogy Research Checklist

Every genealogist uses different record sets and different resources. For that reason, no single "checklist form" can possibly cover all the avenues of research. But you should create your own form (based on examples listed under Resources below) to use on a regular basis.

Here are links to the comprehensive Genealogy Research Checklist with over 280 records sets listed. The list is biased towards US research, but you are invited to use this list as a template to create your own. The list is available in Microsoft Excel, PDF, and Microsoft Word formats.

- **Genealogy Research Checklist – Excel**
  https://genealogybargains.com/genchecklist-excel

- **Genealogy Research Checklist – PDF**
  https://genealogybargains.com/genchecklist-pdf

- **Genealogy Research Checklist – Word**
  https://genealogybargains.com/genchecklist-word

Tapping into the Power of Genealogy Networks

One of the focus areas for many genealogists is understanding "what we don't know." It isn't possible to be an expert on every area of genealogy, and we often need the help of other genealogists. Utilize online as well as offline networks and resources.

Online

One of the best ways to gain instant access to a vast and FREE network of genealogy knowledge is through social media. While you may not be a fan of sites like Facebook or Twitter, you should consider using them only for genealogy purposes and only to gather information to assist in your research. Remember, no one ever said you had to go "all in" on any of these sites and share all of your personal information.

The fact is that genealogists are beginning to realize that while we may have used AOL, Prodigy and Everton's Genealogical Helper in the 80s and 90s to connect with other researchers, those platforms have been replaced by social media.

Facebook Search: Facebook's Search field is located in the upper left corner. Enter your search criteria and click the magnifying glass icon to see search results. Use surnames and locations in your searches for the best results.

- **Explore ALL results**: Click the magnifying glass icon at the top or bottom of the search results list. A new page will appear with results grouped by section in the **Result Type** sidebar on the left.

- **Use See More option**: Facebook limits the number of results shown for each section. Always click **See more** at the bottom of the results list.

- **Explore all Result Types**: Use the **Result Types** sidebar on the left to explore search results for Pages, Groups, Photos and more.

Facebook Groups: Before you can use any of the features of a Facebook Group, you may have to make a request to "join" that group. Most groups have a security setting of Closed in order to ensure that members understand the group's rules and focus area.

- **Search within the group**: After joining a Facebook Group, scroll through the recent posts. Before posting a query, use the search box (upper right below the Cover Photo) to see if your question has already been posted and answered.

- **Post only relevant info**: A Facebook Group is not a billboard or a place to have general conversations. If the focus of the group is on German Genealogy, only post articles and queries relevant to that topic.

- **Update posts**: When asking for assistance with a problem, if a resolution has been found, return to the original post, click **Edit** and type SOLVED or RESOLVED at the beginning of the post.

- **Add group to Favorites**: On the left sidebar, under **Groups**, click **More**. A list of groups to which you belong will appear. Click **+Add to Favorites**.

- **Manage Notifications**: If you belong to an active group, click **Notifications** and decide how and when you want to be notified of updates.

- **Check Files section**: Locate the Cover photo at the top of the group and click on **Files**. Often, the group Admin and members will post templates and other downloadable files for genealogy.

- **Use hashtags**: Did you know that you can use hashtags in a Facebook post and it becomes a search tool for that group? Enter **#genealogy** or **#software** in the post. Then click on the hashtag to find similar posts within the group.

Facebook Pages: Facebook Pages have limited use for genealogists and family historians; think of a page as a news channel where you receive updates. Pages don't allow much interaction with those who "like" or follow a page; the conversation is often "one way."

- **Use Facebook Page as an information feed**: Click **Like** on a page to follow any updates made on the page. These updates will appear in your **News Feed**.

- **Use Facebook Pages for vendor customer service**: If you encounter an issue with a genealogy product or service, try sending a Message to the page Admin; most vendors monitor their pages for customer-service related inquiries.

- **Get Notifications**: Make sure you are notified when new items are posted to the page. Click the down arrow next to **Liked** and select **Get Notifications**.

Twitter Search: While you may not want to use Twitter in its normal fashion – as a means of posting status updates or commentary – you should be it as a search engine for clues in your genealogy research. You do not need a Twitter account . . . simply go to http://search.twitter.com and type in your keywords (especially surnames and location names). Also include "#genealogy" to exclude non-genealogy related posts.

Going Beyond Online Research

Remember that just as not every record can be found online, you should leverage in-person networks and resources as well.

- **Genealogy Societies:** While it isn't practical to join every genealogy society related to your research, you might consider contacting a specific society for assistance. Some societies offer research assistance – for free or a fee – while most have a list of resource on their website. And don't forget Facebook! Most societies now have a Facebook page or group where members and non-members can ask questions.

- **Genealogy Conferences:** Attend genealogy conferences and make sure you set aside time to just sit and talk with other genealogists. Also browse the exhibit hall and look for organizations that assist researchers based on ethnicities and geographical locations. Tip: also see if you can purchase or locate syllabus materials from past conferences related to your research.

- **Archives, Libraries and Repositories:** Locate an archive, library or repository related to your area research. Don't forget university libraries! And remember to use WorldCat to order books via inter-library loan and have them delivered to your local public library.

- **Family History Centers:** Locate the closest Family History Center for a variety of local, national and international resources. Remember, that as FamilySearch has terminated the ability to "rent" microfilms, you can find some local copies at these center as well as online databases of records that cannot be accessed online from your home or office.

- **Hiring a Professional Genealogist:** For those of us who pursue genealogy as a hobby, hiring a professional may not seem like an option. Rather than hiring a pro for a long term project, consider hiring a "coach" from GenealogyDotCoach to assist with a focused problem area. In addition, professional service sites such as Legacy Tree Genealogists offer packages within reach of the hobby genealogist.

Resources

- **Association of Professional Genealogists**
  http://apgen.org
- **Conference Keeper**
  http://conferencekeeper.org/
- **Evidentia**
  http://www.evidentiasoftware.com
- **Facebook**
  http://www.facebook.com
- **Family History Center Locator**
  https://www.familysearch.org/locations/centerlocator
- **Federation of Genealogical Societies**
  https://fgs.org/cstm_societyHall.php
- **Genealogy Dot Coach**
  https://genealogy.coach/
- **Genealogy Libraries in the US**
  https://www.gwest.org/gen_libs.htm
- **Genealogy on Facebook List**
  https://socialmediagenealogy.com/genealogy-on-facebook-list/
- **Genealogy Record Reference Cheat Sheets** (Family Tree Magazine)
  https://www.familytreemagazine.com/cheatsheet/recordreferences/
- **Genealogy Research Checklist – Excel**
  https://genealogybargains.com/genchecklist-excel
- **Genealogy Research Checklist – PDF**
  https://genealogybargains.com/genchecklist-pdf
- **Genealogy Research Checklist – Word**
  https://genealogybargains.com/genchecklist-word
- **Genealogy Research Log** (Excel)
  http://genealogyresearchlog.com
- **Legacy Family Tree**
  http://legacyfamilytree.com
- **Legacy Tree Genealogists**
  http://legacytree.com
- **Popplet** (mind mapping)
  http://www.popplet.com
- **Research Checklist** (Midwest Genealogy Center)
  https://abundantgenealogy.com/research-checklist-mwgen
- **Research Checklist** (National Institute)
  http://www.genealogicalstudies.com/eng/forms.asp
- **Timetoast**
  http://www.timetoast.com
- **Twitter**
  http://www.twitter.com
- **WorldCat**
  http://www.worldcat.org