

# Genealogy Do-Over - Week 1 Cycle 4: 2-8 October 2015

- [Genealogy Do-Over Cycle 4: Schedule of Topics](#)

**Topics:** 1) Setting Previous Research Aside, 2) Preparing to Research, and 3) Establishing Base Practices and Guidelines

[*Editor's note:* Much of the text below is unchanged from the [original Week 1 posting](#) on January 2, 2015 except for my personal updates.]

Before we review the Week 1 topics, I want to give a little pep talk here since in the lead up to Cycle 4 of the [Genealogy Do-Over](#), many say they are feeling discouraged and overwhelmed. Remember: while the Genealogy Do-Over is a project-based learning initiative to improve genealogy research skills, **you should be having fun**. You should look forward to trying new approaches each week.

- **“When are we going to start research?”** was a common question during each cycle. Some just wanted to dive right in and get online and look for stuff. My belief is that we need to lay a firm foundation and take our time before we set out on our search. A solid base of goals, procedure and tools will carry us through to the end and shouldn't be improvised as we go along.
- **“There's too much information; I'm drowning!”** is also something I see posted on the [Genealogy Do-Over Facebook Group](#). That's why you're here at the Genealogy Do-Over: **to gain skills to better manage the flood of data**. Keep in mind that Big Data is something we as genealogists will continue to deal with in the future and the amount of data increases each month and each year. Learn to work smarter and determine the best data for your research.

And finally, remember that what I've put together for the Genealogy Do-Over is based on my discoveries in changing my research habits over the past year. **Your mileage may vary** which means what works for me might not necessarily work for you. Feel free to make changes to the program by using different tools and different procedures. Just be true to your **Base Practices and Guidelines** (see below) and we'll all likely arrive at the same destination: better genealogical research.

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## Setting Previous Research Aside

For many participants in the Genealogy Do-Over this can be the most difficult step in the entire journey: **breaking with previous research materials and with previous practices**. Remember that how you decide to “break up” with your research is your decision. Here are some guidelines:

- **Binders, folders and papers:** If it is not feasible to set them aside, you'll need to be on your best behavior and resist the temptation to automatically consult these items. Remember we're only talking 13 weeks here!

- **Reserving specific items:** It makes no sense whatsoever to spend money (and waiting time) on records that you acquired previously. Make sure they are easily accessible and, when using them, you only refer to the actual data in the record . . . and don't look at any post it notes or notes you've written in the margins.
- **Digital holdings:** These files are the easiest to handle and move to a holding area, but at the same time their ease-of-access make them prime candidates for a "research crutch." Don't be tempted to go back to old research in these online files, if possible. Trust in the process and that starting from scratch and looking at records from a new perspective will bring success in your research.

Easy-peasy, right? More like "easier said than done" . . .

- **What I'm Doing:** I am doing my own genealogy as part of Cycle 4 and I had already moved all my paper files into a banker's box before I started. I did save several paper copies of vital records as well as some photos. Also, I placed all digital files into a HOLD folder which, I am proud to say, I have not been tempted to use!
- **"All-In" Participant Options:** If you are sitting on a considerable amount of paper files and binders, try to sort through them and quickly pull those records that took considerable time, effort and money to order or collect. Another option is to simply put everything aside and then when you reach a point in your research where they are needed, place the task of locating that record on your To Do list. For digital files, try the same approach of moving them to a HOLD area. If you don't feel confident in your tech skills (and fear losing items or causing an error with your database software), simply commit yourself to not accessing these files unless absolutely necessary.
- **Modified Participant Options:** Those doing a "Genealogy Go-Over," as some call the process, can work on organizing files, digital and paper. Then locate essential documents that prove a relationship and either set them aside for future review or create an index . . . sort of like a Top 20 or Top 50 Document list.

### **Preparing to Research**

It may sound odd for many of us to do "prep work" before researching. However, I found that if I took time to prepare my workspace and my mind for research, I had much better results.

For me this means I will no longer research at 2:00 am if I am tired or half-asleep. It also means that I will no longer say to myself, "Oh I have 15 minutes before the roast in the oven is done, I'll look for Grandpa some more." One of my biggest problems in the past was not starting or finishing the research process properly. And the finish turned out to be just as important for me: with a good ending to a research session, I would know exactly where to pick up the next time I started.

So over the next week, **think about how you've researched in the past in terms of time, location, tools used, etc.** Consider making some changes. Write down some research "warm up" exercises and try them once we get to the research phase. Make a list of items that you must have available when you are researching (a copy of *Evidence Explained*, a spiral notebook, your copy of Evernote open on screen, etc.).

### **Establishing Base Practices and Guidelines**

This last topic offers lots of room for trying different approaches; however, most genealogists who have been researching for the past few years will likely have the same concerns and the same common practices.

- **What I'm Doing:** I've already outlined many of my self-imposed guidelines in my post [Golden Rules of Genealogy](#). If I had to prioritize the areas and procedures, the list would include: 1) track all work, even dead ends, negative evidence and non-productive searches; 2) cite sources, even if in a rudimentary manner to note the "what, where and when" information about a record; 3) make the "first pass the only pass" which means slow down and spend as much time as needed on a document or source and writing every bit of information out of it. Later on in the Genealogy Do-Over process, I'll have to decide on a file naming convention and a genealogy database software program.
- **All-In Participant Options:** Don't gloss over this topic! Spend some serious time outlining what procedures you'll use to research, both online and offline. If a process is too cumbersome, you won't stick with it. Come up with a list of five (5) top procedures that you can handle over the 13 week period.
- **Modified Participant Options:** Review the procedures that other participants will be using; a good source is the Genealogy Do-Over resource page at <http://www.bagtheweb.com/u/genealogydo-over>. If you feel you already have solid research procedures, keep using them. If you need to change your research habits, write down the changes and commit to them over the next 13 weeks.

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### **Next Week: Week 2, Cycle 4 – 9-15 October 2015**

- Setting Research Goals
- Conducting Self Interview
- Conducting Family Interviews

Thanks for being a part of Cycle 4 of the Genealogy Do-Over and your feedback is always appreciated. You can leave a comment on the blog post at [GeneaBloggers](#), email me at [geneabloggers@gmail.com](mailto:geneabloggers@gmail.com) or post at the [Genealogy Do-Over Facebook Group](#).

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