



## ResearchTies: Data Entry Tips and Tricks

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### The purposes of a research log

- Record objectives
- Record what has been searched
- Prevent duplication of effort
- Organize the results of research
- Assist in the analysis of research
- Plan future research



### The overall data entry process

- Formulate and save an objective
- Add the searches you will conduct to meet the objective
- Enter the results of each search

### Data entry from lists

#### 1. Add Individuals

##### Hand data entry

Record names, dates, gender, ID numbers

**Names** – Use full legal names, as recorded in your genealogical data program.

**Dates** – Record full dates when known. Partial dates and abt can be used as needed.

**ID numbers** – Record the ID numbers from your data management program. For FamilySearch ID, record the Family Tree PID, if desired.

##### GEDCOM import

From the home page, click on “Import GEDCOM.”

This process will bring in individuals, surnames, and families.



#### 2. Add Families

Families can be added by hand or through a GEDCOM import. When adding by hand, select the husband and wife from the dropdown lists. Begin typing to narrow the list, then click on the appropriate entry. Another option is to type the ID number of the desired person. If the individual you want is not in the list, add them.



**Green Add buttons** – The dropdown lists in the program are specific to your research. Add the desired information to your lists, as needed, by clicking on the green add circle. The appropriate template will open, add your data, then save. The new entry will now be available to select in the current field, as well as any future data entry.

**Place** – Where did the event occur? Select from the dropdown or add what is needed. When adding a place, include all jurisdictional levels.

### 3. Surnames

Record the surnames you are researching. These are the surnames that will be available to select from your dropdown boxes.

**Spelling variations** – You can add as many alternate spellings as you would like. This feature allows you to search for information by surname, regardless of the spelling.

### 4. Places

Record all jurisdictional levels for each entry, but also create entries for all levels. You will be researching records on all jurisdictional levels, and you'll need to select the jurisdiction that created the record being searched. Some are national records, some state, some county, etc.

### 5. Repositories

Add the repositories you use the most, before adding searches. This is more efficient for the data entry process.

**URL** – Record the URL of the repository's online catalog for quick access in the future.

**Comments** - Include the hours, parking information, whether a reading card is required, or anything else that will be helpful when using the repository.

### 6. Sources

Add your most commonly used sources--ones that you use over and over again. For efficiency, add your repositories before adding sources. Otherwise, they can be added with the green add button.

**Record type** – Be sure to include the record type. This allows the user to search logs by record type.

**Author and Title** – The author and title information are used in dropdown boxes, so they need to be recorded separate from the rest of the citation. Corporate authors should be recorded in the Author's surname field.

**Title** – Record the title exactly as it is found in the catalog. Copy/paste works well, and this makes it clear exactly which record you are referring to.

**Film number** - If the record is a collection of films, the individual film number will be entered later with each result. If the record is only one film, enter the number here, eliminating duplicate data entry with multiple results in the same source.

**Additional citation details** - All remaining citation information is recorded in this text field. Use the correct citation format generally accepted for the country and/or repository. If the citation has been entered in your data management program, consider doing a copy/paste here for efficiency.

**URL** – The URL can be to an online source or an online catalog entry for the source.

**Comments** - This field is for any comments about the source that might be helpful.

### Adding Objectives

From the home page, click on “Add Information,” then select “Add Objective.” Next, select the type of objective you would like to add.

1. Conduct a Preliminary Survey – This objective is to learn what has been done by others, before you begin original research.

**Additional Details** – Record any information that will be helpful in meeting your objective.

**Complete** – When an objective has been met, check this box. This allows users to find objectives according to whether or not they have been completed.

2. Search a Record Group – Choose this option when searching a record type for a person, family, or surname in a particular jurisdiction.
3. Identify a Person – Use this objective type to search for people in various relationships. (e.g. identify someone’s spouse or a couple’s children)
4. Find Event Information – Researchers frequently search for events in an ancestor’s life. This objective can be used to search for a marriage, military service, migration information, etc.
5. Other – When all else fails, use the custom template to write your own objective. Selecting places and names gives the search engine a way to find these entries.

### Adding Searches

After writing an objective, users need to plan which searches will be conducted to meet that objective. Locate the desired objective and click on “Add Search.”

**Author and Title** – A source can be located by using either the title or the author field. To record a source that is not yet in the dropdown list, click on the green add button.

**Surname** – Record the surname to be searched. This allows the user to locate all searches conducted for a particular surname.

**Record type** – It is important to include the record type to be able to use this variable in locating log entries.

**General source or Jurisdiction** – If the source was not created for a jurisdiction (e.g. family letters), check the general source box. Otherwise, indicate the jurisdiction being searched.

**Scope** – Be very thoughtful in describing the scope of your search. What exactly will you be looking for? Is the search limited by time period? Will the search be for a specific person or any entry of a surname? When conducting the search, you will need to know exactly what your intent is. And, if the search is nil, you want to know exactly what was nil.

**Comments** – This field is for any additional information that will be helpful when conducting the search, or comments can be entered after the search was conducted.

**Nil search** - If the entire search was nil (based on the scope), click the nil box here.

### **Adding Results**

When conducting research, locate the desired Search and click “Add Results.” Add a new results template for each person located in the search.

**Date** – When recording your research as you go, hit the tab key to record today’s date. Otherwise, type the date or select it with the calendar tool.

**Person Found** - Select the individual from the dropdown list, or add them as needed.

**Name in Record** – Indicate the spelling of the name as it was found in the original document.

**Citation Detail** – Remember that the bibliographic information has already been recorded in the source template. This field is the place to record the details needed to change a bibliography into a footnote. For a book, this would be a page number. For a census, it would be much more.

**Ditto Down Arrow** – Notice that several fields have “ditto down” arrows.

Clicking the arrow will copy the information recorded in the same field in the preceding entry.



**Film number** – When using a source that continues for multiple microfilms, record the film number that applies to this specific result.

**Document number** – This field may be used for filing numbers or file folders and file names.

**Nil** – When a search for a specific person is Nil, use the results template to record the person and check the box that the search was Nil for that person.

**Comments** – Record any comments or information about the results of the search.

**Add Link** – Record the URL for an online record, but be aware that URLs may change over time. For document preservation, ResearchTies recommends that users download a copy of the result and load it to the server. More than one link can be recorded.

**Add file** – Any digital file can be loaded as the result of a search. (.jpg, .pdf, .docx, .xlsx, etc.) These files can be images, translations, transcriptions, research analysis and conclusions, and more. More than one file can be added to the results.

**High quality, consistent data entry will produce a powerful capacity for searching your data.**

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