

## Introduction

I have been concerned for some time that there is a gap in our analyses between the genealogical research process, the evidence & conclusion model and my aspirations for a "scientifically" robust process and write-up. This page is an attempt to fill in that gap and define more specifically what we need - in my *personal* opinion - to be documenting and therefore what I would like to see in my ideal genealogy research software. It may very well be that this page does no more than document what you, the reader, felt was obvious. If so fine, but I have satisfied myself that I have filled in the gap.

## Fact research process

This process researches a specific event or attribute about something or someone. It does not attempt to set an overall strategic direction.

### 1. Set and record high level objectives

#### *Input*

- Current conclusions about people, things, etc

#### *Output*

- High level objectives – what events or attributes are to be investigated and for who? (e.g. “Who were the parents of X?”)

### 2. Create a “reasonably exhaustive” initial search plan with short term objective re what attribute / event values to look for

#### *Input*

- High level objectives – what events or attributes are to be investigated and for who?
- Current conclusions about people, things, etc
- Useful data about what sources to look for when looking for evidence relating to specific attribute / event values (e.g. “parents’ names can be found on Scots death certificates”) (probably this data is held elsewhere)
- Useful data about who might have created those sources (e.g. “post-1837 marriage certificates in England were created by register offices and / or churches”) (probably this data is held elsewhere)
- Useful data about those sources e.g. “pre-1837 marriages in England were always in Church of England parish churches” (probably this data is held elsewhere)
- Where to look for those potential sources (e.g. list of where Cheshire parish registers can be

found) (probably this data is held elsewhere)

### *Output*

- Location of *relevant* sources (e.g. microfilms of parish registers (PRs) for Nantwich, Acton and Wistaston are at Chester Archives)
- Statement of “how” I intend to fulfil the objective – search criteria *and* intended logic (e.g. look for all marriages in Nantwich, Acton and Wistaston between 1820 and 1840 with groom’s name = X *and* check matches to original couple)
- Documented assumptions – “As both X and Y live close to where they were born, according to the censuses, it is assumed that they were married reasonably close to there.” Also “It is assumed that neither of N and W were Quaker or Jewish” – these are the two exceptions to the rule about marriage in CofE church.

3. Carry out research according to initial search plan.

### *Input*

- Location of *relevant* sources
- Statement of “how” I intend to fulfil the objective
- Documented assumptions

### *Output*

- Contents of the researched sources, documented in such a way as to be understandable (e.g. a series of marriage transcripts for people satisfying the search criteria) and with enough data to enable accurate citations
- Updated log saying what’s been searched, what was missing, etc.

4. Analyse results of research to see if short-term objective has been met. Document that analysis. Are there any interim conclusions? Is there any conflicting evidence? (e.g. These are the marriages matching our couple but there is more than 1 match, so we cannot yet tell which is their marriage)

### *Input*

- Contents of the researched sources, documented in such a way as to be understandable (e.g. a series of marriage transcripts for people satisfying the search criteria).
- Updated log saying what’s been searched, what was missing, etc.

### *Output*

- Results of analysis
- Interim conclusions – if any

- Conflicting evidence – if any

5. If the short-term objective has not been met, or if there is conflicting evidence, return to create new search plan with revised short term objective

6. If the short-term objective *has* been met with no unexpected conflicting evidence, analyse results to see if high-level objective has been met. Document that analysis. What are the conclusions? Is there any conflicting evidence?

*Input*

- As outputs from above

*Output*

- Results of analysis
- Final conclusions – if any
- Conflicting evidence – if any

7. If there is any conflicting evidence, return to create new search plan with revised short term objective.

8. Enter the final conclusions into the genealogy application, either

- merging these conclusions into existing people, events, objects, etc, deleting or replacing conclusions that are no longer accepted (i.e. use the "conclusion-only" model) or
- creating new people, events, objects containing the new conclusions plus old conclusions that are still accepted (leaving the old detail there but marked up as "superseded") (i.e. use the "evidence conclusion model")

## **Application Software**

The crux of the matter is this - what do I want to see in an application? And therefore in the BetterGEDCOM Data Model? The answer is - *everything* that's recorded as an input or an output above. Actually, there are exceptions denoted above by the phrase "probably this data is held elsewhere" since otherwise we'd end up dumping all the text books into our applications. But after these first steps, I'd really like all that lot to go into my application.