PUTTING LEGACY IN ITS PLACE

INTRODUCTION

In writing articles for the VicGUM newsletter my focus has been on WHAT the features of Legacy are and in focusing on Legacy's features I have let Legacy dictate HOW I record my family stories.

This month I am stopping for a moment. I am taking a couple steps back from Legacy Family Tree to reflect on my experience half way through Thomas MacEntee's Genealogy Do Over.

Figure 1 Genealogy Do Over

I hadn't given serious thought about HOW I should use Legacy Family Tree until I read Geoff Rasmussen's book *Legacy Family Tree Unlocked!* Until I cast aside my pens and notebooks for a camera, USB drives and my tablet, loaded with Families (including To-Do Items), as my tools of preference on research visits.
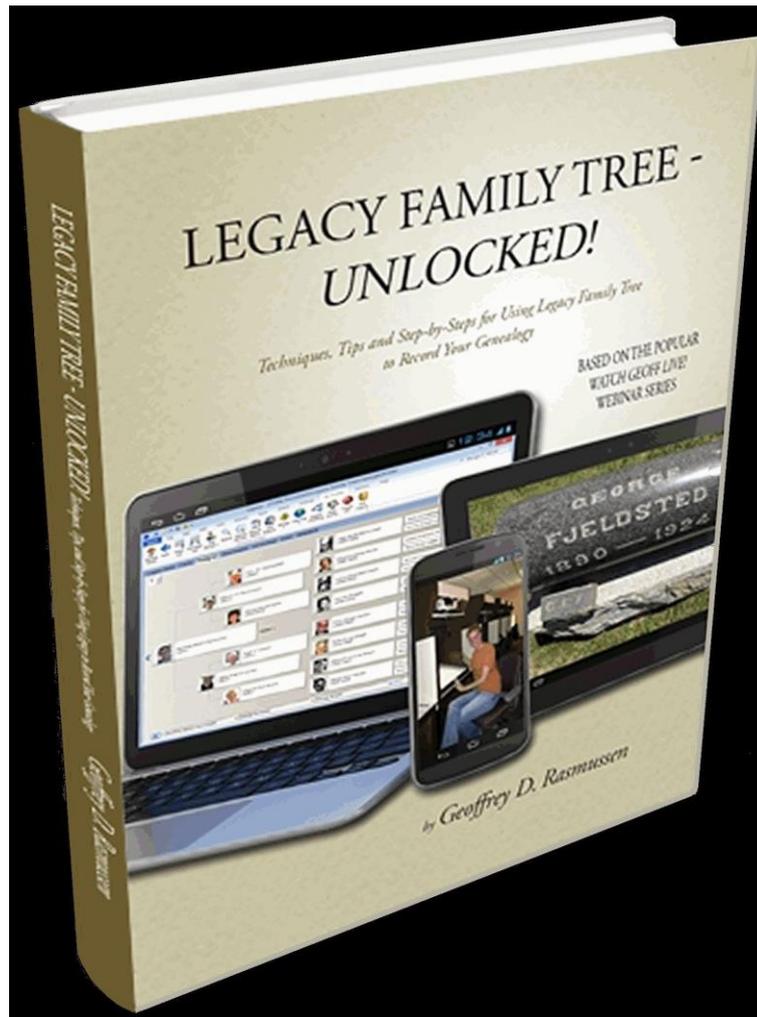
Figure 2 Legacy Family Tree Unlocked!

Hard on the heels of applying this change to my research visits came Thomas MacEntee's Genealogy Do Over.

Just at the right time for me.

I now understand why my family database is a mess, why I never seemed to have time to tidy it up and why I am distracted by every Bright Shiny Object that passes before me. I have now consciously set aside my old slapdash research methodology.

So this month I'll share with you my Genealogy Do Over experience so far.

MY NEW GENEALOGY RESEARCH MODEL

As part of the Do Over I have built a research methodology for myself.

I haven't been able to share my family stories as much as I would like over the past few years. So what do I need to change? This is where the Genealogy Do Over comes in. I am building a Genealogical Research Model for myself with the aim of

optimizing my chances of gathering family stories and helping me find time to focus on telling those stories.

Let me list the elements of my model so far before looking at each in a little more detail.

My Genealogy Do Over began well with the consideration of my **Genealogy Golden Rules**. From my Genealogy Golden Rules everything else seems to have fallen into place.

So far.

In particular, writing down my **research goals** for the period of the Do Over is keeping those Bright Shiny Objects immediately distracting me away from my goals. Bright Shiny Objects are now parked for possible consideration later on. For the first time I have given some consideration about how **I manage my projects** or research goals. Rather than let those Bright Shiny Objects and what is right in Legacy manage me.

Geoff Rasmussen introduced me to the use of Legacy's To-Do List and To-Do Items. As part of the Do Over I have been further considering my use of Legacy's To-Do List as place to manage my projects as well as act as my **research log.**

One aspect of the Do Over I have had considerable difficulty with is distinguishing between the Do Over subjects **tracking research** and **tracking searches.** I eventually realised that, for me, they are probably one and the same. Nevertheless, there are elements of searches that I have been neglectful of and that I have now included in my research model.

A little tweaking of the naming of my master **sources**, the naming of my top level media folder and the naming of my research log categories has resulted in an unexpected similarity between the three. Apart from giving me a warm fuzzy feeling, such similarity makes filing information simpler and retrieval of information easier.

I have also found that I prefer to **evaluate evidence** in my Legacy Events rather than as part of my research log.

There is one exception to my everything in Legacy philosophy. At present my **research toolbox**, still in its infancy, is kept outside Legacy. Nevertheless, I have found a neat little way to link my toolbox to Legacy.

It's one thing to make all these changes in theory and to even apply them but does my new model form a coherent and understandable whole? Let's see.

MY GENEALOGY GOLDEN RULES

My Genealogy Golden Rules set guidelines, boundaries, or paddock fences for my genealogy research model.

For example, paper was the only storage available when I began gathering my family stories. One of my difficulties over the years is to remember just where I have written something down in my notebooks for later. That's if my search ever made it to my notebooks in the first place. Most searches with nil results never make it to my notebooks. So I do the search all over again. With the same negative result. Now there are many electronic storage options available.

Moving to electronic storage merely changes my dilemma from where to find my information in one of my notebooks to where can I find information on my computer hard drive. So one of my 2015 resolutions is to use my Legacy database as the only place to include my family stories or as the place to find links to information about my family stories. Consequently, the following genealogy golden rule is a critical boundary within which my genealogy research model operates:

My Legacy database contains the information I have gathered about my family over the years.

I had a post decision chat about this rule with my sister Kathy who uses spreadsheets far more than I do. She was firm. All in Legacy she said. All in the one place. With less than 5% of my media files linked to Legacy I am sure there is a hint in this advice!

RESEARCH GOALS

So what were my 2015 New Year resolutions concerning telling my family stories in 2015:

- Maintaining a weekly blog for at least the duration of the Genealogy Do Over
- Substantiating my connection to John Bourke Ryan and George Watts
- Reviewing a Family Group Report for my three greats grandfather Private George Watts (1792-1845)
- Reviewing my Family Group Report for my four greats grandfather John Bourke Ryan Esquire (1760 - 1835)
- Creating a timeline for Squattlesea Mere Pastoral Run and
- Creating a scrapbook of charts as I go

I set these down in writing as a General To-Do Item with the following settings:

- Category: Research Log

- Task: Research Goals for the Genealogy Do Over
- Reminder Date: 3 April 2015
- Priority: High.

Figure 3 2015 Research Goals

Barely a month into the Do Over I have revised my research goals. For two reasons. Firstly, I was overly ambitious in setting my initial goals. Secondly, I have included some of those Bright Shiny Objects in their proper place in my revised list. So my research goals for the Do Over now look like this:

Fortnightly

- Write a blog

For Congress 2015

- As an example take a Family Group Report for my three greats grandfather Private George Watts (1792-1845)
- As an example take a Family Group Report my four greats grandfather John Bourke Ryan Esquire (1760 - 1835) (as well as create a report for his younger brother Lieutenant Colonel Sir Edward Michael Ryan)

For consideration in April as part of my next set of research goals:

- Creating a timeline for Squattlesea Mere Pastoral Run
- Create a free pdf printer for Kathy
- Start preparing for VicGUM's Legacy workshop on 20 September
- Prepare more display material for Legacy User Group meetings including a photobook of chart examples
- Investigate the possibility that Francis Baulch's brother William emigrated to Australia after the death of his wife (and after the death of his mother?). If so, did he come with George Cook (possibly his brother-in-law)?
- The Genealogical Society of Victoria maintains VicFamilies which is a database of members' interests in Victoria. Review and update to Legacy 8 instructions for creating a CSV file which can be used to submit information to VicFamilies
- Analyse DNA results for Eliza Ann Porter's maternal line and for our Baulch paternal line. Consider the worth of tests for our Learmonth paternal line, our Salter paternal line and for the maternal line of our Irish orphan Ann Cathcart.

Figure 4 Revised Research Goals

The lesson is that whilst I set goals at the beginning of the year (at the beginning of the Do Over) these goals need to be regularly reviewed, particularly in relation to inadvertent distraction by Bright Shiny Objects.

The most notable result of writing down my genealogy research goals is that I have no understanding of how long it takes me to complete my genealogy research tasks. No wonder I think I never have enough time! Recording the time tasks take me is definitely an area worthy of reflection as I conduct my research going forward. For then I can set more realistic research goals and perhaps not get frustrated about apparent non achievement of my goals.

MANAGING MY PROJECTS

It is quite obvious to me now that writing down my goals, planning my research and keeping a research log, while very time consuming initially, is a decided improvement to keeping some ephemeral plan in my head.

My research goal to create a Family Group Report for George Watts is really a high level objective – as are the other elements of my original research goals. I can break my research goals for the current period into more manageable parts, each with its separate Legacy To-Do Item.

Status	To-Do Item
O	Research Goals for Genealogy Do Over
O	Research Goals for Genealogy Do Over - George Watts
O	Research Goals for Genealogy Do Over - John Bourke Ryan
O	Research Goals for Genealogy Do Over - Scrapbook of Charts
O	Research Goals for Genealogy Do Over - Squattleseamere Pastoral Run

Figure 5 Research Goal Details

So now I can manage my George Watts project independently of my other projects for the Do Over. My George Watts project is to create a Family Group Report for him. My project for George Watts is part of my research goals or my research plan – half way between my current overall research goals and my research log entries.

* Task Description   Results   Repository

My Research Goals for the Genealogy Do Over include:
*   Substantiating my connection to George Watts:
  -   birth and marriage certificates for Patricia Daly
  -   birth, marriage and death certificates for Donald George Baulch
  -   birth, marriage and death certificates for Parke Egbert Baulch
  -   birth, marriage and death certificates for Eliza Ann Porter
  -   birth, marriage and death certificates for Lydia Watts
*   Reviewing a Family Group Report for my three greats grandfather Private George Watts (1792-1845). This will include:
  -   birth, marriage and death certificates for George's children (other than Lydia) - Mary, Martha and Lazarus (or other confirmation of these events)
  -   birth, marriage and death certificates for George Watts and his wife, Mary McCade or McCord (or other confirmation of these events)
  -   information about George Watts' British Army service
  -   information about the 1812 Luddite riots in Nottingham
  -   emigration/immigration information for Lydia and Lazarus Watts
  -   1841 and 1851 Census information (and possibly later census information for Mary and Martha Watts)

Figure 6 Research Goals for George Watts

LEGACY'S TO-DO LIST AS A RESEARCH LOG

Finally, at the bottom or at the most detailed part of my project for creating a Family Group Report for George Watts are several research log entries or To-Do Items grouped as follows:

- establishing my connection to George Watts
- creating the Family Group Report for George Watts and
- updating, where necessary, my family tree in Family Search with respect to the information I have gathered.

To-Do Item
1 Research Log Template
a My relationship to my parents
b Don Baulch's relationship to his parents
c Bert Baulch's relationship to his parents
d Eliza Ann Porter's relationship to her parents
e Lydia Watts's relationship to her parents
f Mary Watts' relationship to her parents
g Martha Watts's relationship to her parents
h Lazarus Watts's relationship to his parents
i Mary Watts's (nee MacCade) birth, marriage and death details
j George Watts - birth, marriage and death details
k George Watts - Army Service and further Reading about Regiments
l George Watts - Background - 1812 Nottingham Luddite riots
m George Watts - 1841 and 1851 Census
n Lydia and Lazarus Watts - emigration to Australia

Figure 7 Research log for George Watts

So now, not only do I have a path from my research goals to my research log I also have a number of research log entries or To-Do Items each of which is just a small achievable task towards achieving my research goals.

Let's look at one research log entry. When I look to establishing my connection to George Watts I need to confirm:

- my relationship to my father Don Baulch
- my father's relationship to his father Bert Baulch
- my grandfather's relationship to his mother Eliza Ann Porter
- my great grandmother's relationship to her mother Lydia Watts and
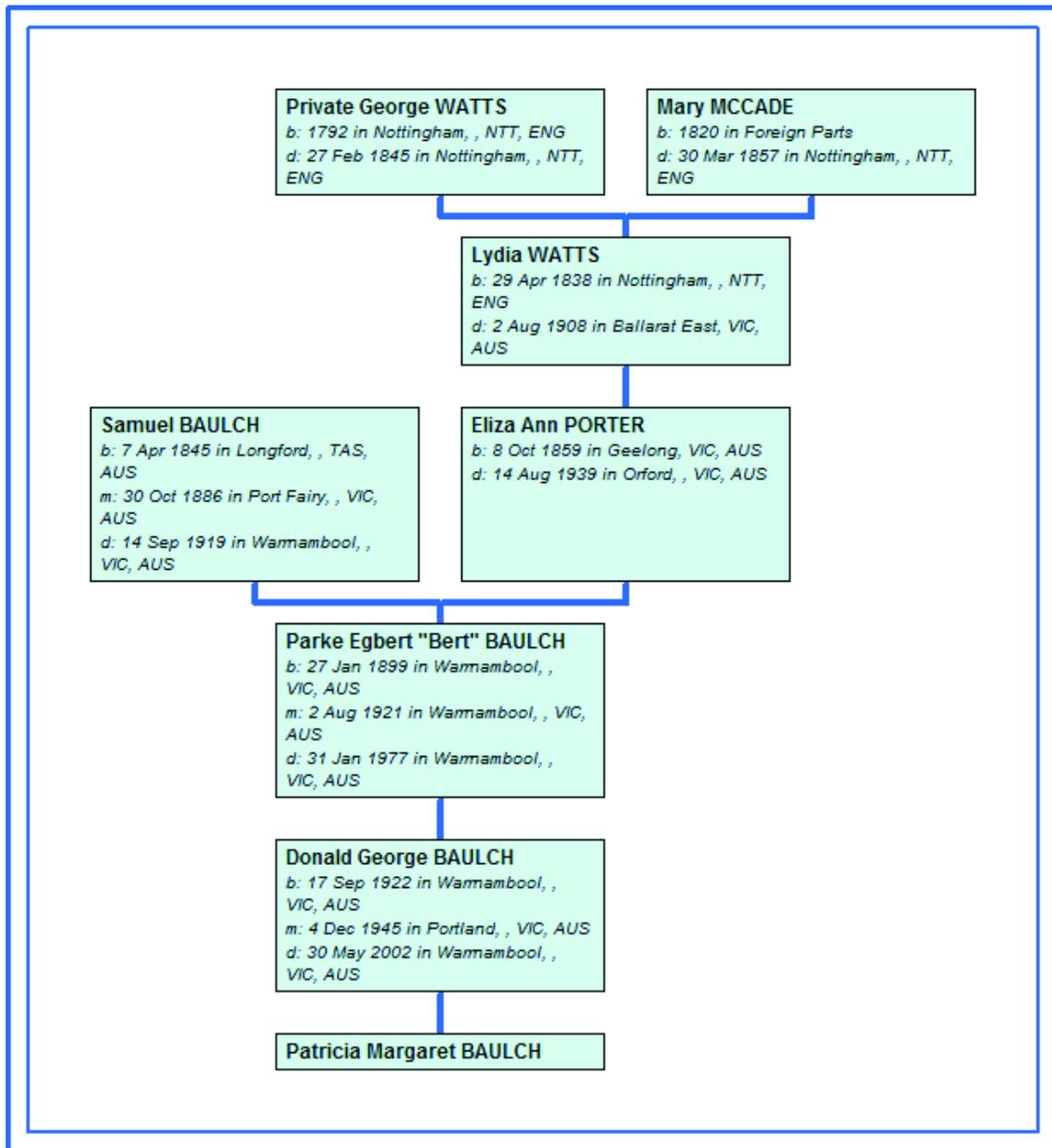- my two greats grandmother's relationship to her father George Watts.

Figure 8 My connection to George Watts

I have a To-Do Item for each step. For example, I established Lydia Watts's connection to her father George Watts using her birth, marriage and death certificates as sources.

I have five sources to consider for Lydia Watts:

- birth certificate
- index to baptismal record
- baptismal register
- marriage certificate
- death certificate

I added the information I found to the Results part of my To-Do Item for Lydia Watts. In Legacy I can't link media files to the To Do Item so I picked up a tip from the Do Over and included the file names for the sources in the results for this piece of research.
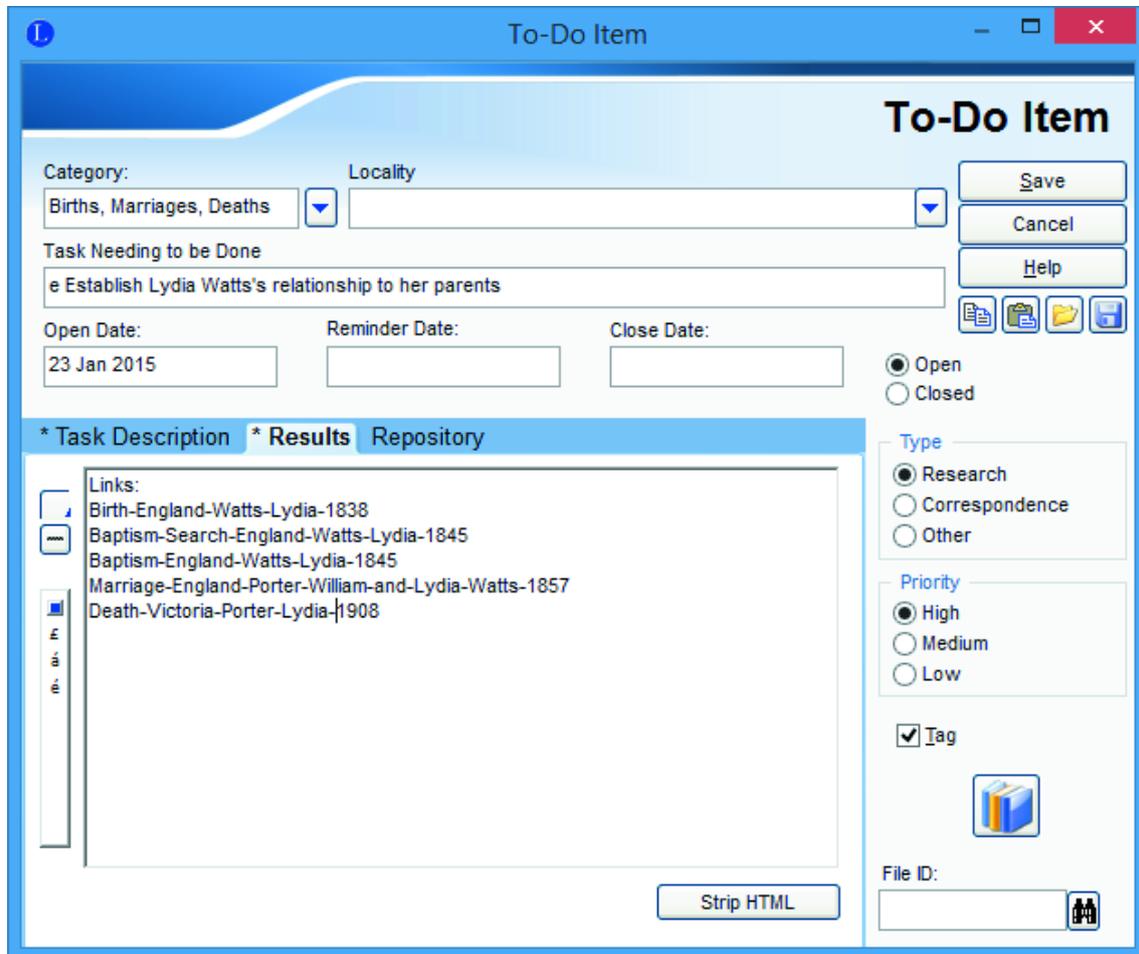

Figure 9 Research Documents

I can, however, include my Sources information with my research log entry or to-Do Item. That is, I can organise my Sources in my To-Do Item in readiness to include in my family database proper.
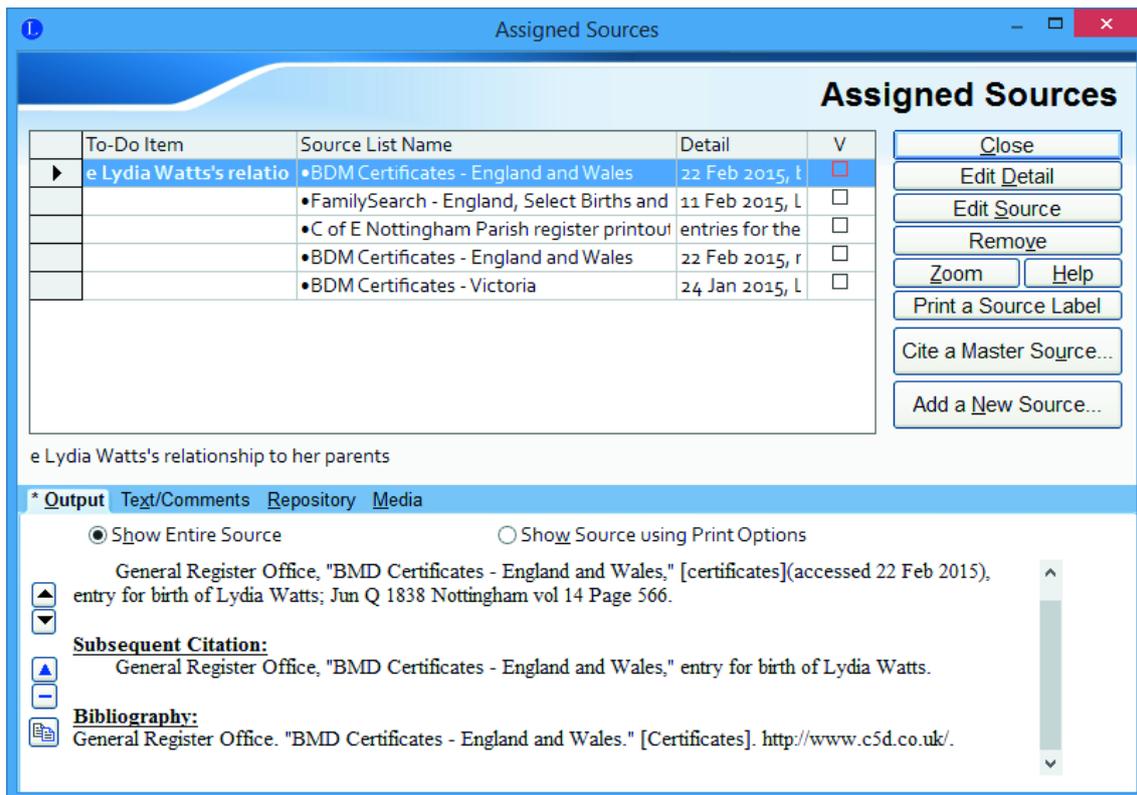
Figure 10 Sources captured in research log

After I have entered information for Lydia Watts's birth, marriage and death it is a simple matter to copy the source information to the source clipboard and then paste it in Lydia Watts's record as appropriate.

Remember that the essential place to include sources when I am establishing Lydia Watts' connection to her father, George Watts is under Father Relationship on the Assigned Sources screen.

Figure 11 Assigned Sources for parents

Incidentally, for more about the importance of including Assigned Sources for an individual's relationship to their parents see Michele Simmons Lewis's post *A neglected source citation*.

The next part of my research into my three greats grandfather George Watts is to gather all the information I have for George and his family. This includes

- birth, marriage and death information,
- census information,

- emigration information for his children Lazarus and Lydia,
- information about George's British Army service
- a description of the Luddite riots in Nottingham at the time George enlisted and
- when available, mtDNA information for George's wife.

CAPTURING RESULTS

Until now I have rarely recorded my unsuccessful searches. And of course I have subsequently repeated such searches. Several times.

I guess the reason is that I have been reluctant to attach such sources to an individual. Indeed, there are some instances where I am not sure which individual is the relevant one. I could use a "Not Yet Proven" Event but now I realise that I can also attach such searches to an appropriate To-Do Item.

Another tip for capturing Sources early in the research process is to include the source in a text box on a screen shot of a search and its results. Thank you to my sister Kathy who has for a long time included source information in many of her media images. Joshua Taylor in his presentation to Rootstech also mentioned the usefulness of using a text box in an image to add source information (I am looking forward to listening to Joshua's keynote address to Congress 2015).

Figure 12 Search with nil results

Of course some results are immediately identified as belonging to an individual already in my Legacy database or, as is often the case with a census record, to a family. For example, the 1841 England Census includes an entry for George Watts and his family living then in Nottingham.

* Results Repository

At the time of the 1841 Census the following family were living in St Mary, Byron, District 9 in Nelson Street:
Geo Watts, 30, shoemaker, born in Nottinghamshire (calculated birth year 1811)
Mary Watts, 40, born in Foreign Parts (calculated birth year 1801)
Mary Watts, 9, born in England (calculated birth year 1832)
Martha Watts, 7, born in England (calculated birth year 1834)
Lydia Watts, 5, born in Nottinghamshire (calculated birth year 1836)
Lyams Watts 1, born in Nottinghamshire (calculated birth year 1840)

Figure 13 Census Search Results

It is a simple matter to transfer the results of my research from the To-Do Item, copy and paste the Assigned Source and link the media files to the relevant Event of George Watts and then share this Event with other household members.

So, just to recap to this point. I have included a statement of my research goals for the Do Over as a General To-Do Item in Legacy, included further subsidiary and more detailed goals as to-Do Items before including several To-Do items as particular research log entries.

Furthermore, to ensure I have some consistency between To-Do Items or research log entries I have created a To-Do Item which I use as a template.

EXPORTING TO-DO LIST

A final point about my To-Do List. It can be exported as a CSV file should you wish to look at it from a spreadsheet perspective. Just be careful though, to export General To-Do Items separately to exporting Individual to-Do Items.

	A	B	C	D	E	F
1	Date	Task Name	Category	Priority	Type	Description
2	23-Jan-15	1 Research Log Template	1 Research Log	Med.	Other	Category: Change to relevant Cat
3	23-Jan-15	Research Goals for Genealogy Do Over	1 Research Log	High	Research	My Research Goals for the Geneal
4	23-Jan-15	Research Goals for Genealogy Do Over - Scrapbook	1 Research Log	Med.	Research	My Research Goals for the Geneal
5	23-Jan-15	Research Goals for Genealogy Do Over - Squattlese	1 Research Log	Med.	Research	My Research Goals for the Geneal

Figure 14 Spreadsheet of General To-Do Items

This is because the General To-Do items contain no individual information..

	Name	Task Name	Birth	Spouses	Death	Burial	Parents
		A	B	C	D	E	F	G
1	Name	Task Name	Birth	Spouses	Death	Burial	Parents
2	John Bourke Ryan Esquire [33531]	Research Goals for Genealogy Do Over - John Bourke Ryan	1760/1761, Dublin, Dublin, Leinster, Ireland	Anne WILMER [33609] [MRIN:10712] (1750-1799) m.1791 in York, , Yorkshire,	Dec 1835, Southwark, , Surrey, England	30 Dec 1835, Westmins ter, , Middlesex	, Mathew Ryan [33544] and Mary Bourke
3	Private George Watts [11518]	Research Goals for Genealogy Do Over - George Watts	1792, Nottingham, , Nottinghamshire, England	Mary McCADE [11519] [MRIN:4256] (1820-1857)	27 Feb 1845, Nottingham, , Nottinghamshire, England		
4	Private George Watts [11518]	George Watts - birth, marriage and death details	1792, Nottingham, , Nottinghamshire, England	Mary McCADE [11519] [MRIN:4256] (1820-1857)	27 Feb 1845, Nottingham, , Nottinghamshire, England		
5	Private George Watts [11518]	George Watts - Army Service and further Reading about Regiments	1792, Nottingham, , Nottinghamshire, England	Mary McCADE [11519] [MRIN:4256] (1820-1857)	27 Feb 1845, Nottingham, , Nottinghamshire, England		

Figure 15 Research log as a spreadsheet

Later on, the two can be amalgamated as one Excel spreadsheet.

CITING SOURCES

Now I must confess to being a citation tragic until recently. I still have a collection of citation guides on my bookshelf. For all my angst about sources an analysis of my master sources shows that I use relatively few Sourcewriter templates confined to:

- Archival material
- Personal communications
- Newspapers

Citing books continues to be difficult. This is because the treatment of names in Endnotes differs from their treatment in a Bibliography. For books I just find a template that creates a source something like one of the citation guides.

Of course from time to time I do use other source templates for other source types. For example, I refer to Land Acts occasionally.

EVALUATING EVIDENCE

My preference is to discuss evaluating evidence in a Legacy Event for an Individual. This practice means that any evaluation can be considered in a review of the information I hold for an individual when I print a Family Group Report.

For example, as part of the Do Over I revisited a death certificate I obtained for a George Watts who died in Nottingham between the 1841 Census and the 1851 Census. Because I don't have the patience to wait for certificates to reach me by post I had ordered the certificate from *Certificates in 5 Days* only to set the

certificate aside as the George Watts was 20 years older than indicated in the 1841 Census.

Looking at the other information I have for George Watts as part of the Do Over I now think the information on the death certificate is correct. This has led me to finding that George Watts had joined the Army at about the same time leaders of the Luddite Riots in Nottingham were transported. And many other little facts recorded in George's Events have combined to indicate that this George Watts is my thirds great grandfather.

RESEARCH TOOLBOX

I am still experimenting with the form of my Research Toolbox. I think my Research Toolbox will end up in a Word document as I will use Word's formatting to layout my Toolbox for sharing with others. Formatting that isn't available in any form of Legacy Notes. However, I can still find my Research Toolbox in Legacy by including its filename in a General To-Do Item.

CONCLUSION

The Genealogy Do Over has had me looking at HOW I go about gathering my family stories, about HOW I capture information into my Legacy family database so that I can look at it how I want.

Having some structure about HOW I go about my research and HOW I capture research information will, hopefully, help me to optimise my chances of gathering and telling my stories in a timely manner.

Finally, if you are attending Congress in Canberra please drop by and say hello. You will find me at the Legacy part of VicGUM's stand.

Patsy Daly

REFERRED TO IN THIS ARTICLE

For the announcement of the Genealogy Do Over see
http://www.geneabloggers.com/announcing-genealogy-doover/

Can't wait for your certificates? See Certificates in 5 Days see
http://www.c5d.co.uk/homepage.php

Legacy Family Tree Unlocked! George Rasmussen – available from
http://www.vicgum.asn.au/ including at the VicGUM stand at Congress 2015

30 Pieces of Tech I Can't Live Without Joshua Taylor
https://rootstech.org/video/4053364432001 For those visiting Congress 2015

Joshua will be presenting the keynote address *Connecting Across Past, Present and Future* see http://www.congress2015.org.au/