

Research Results - Tags or Logs?

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As most of you know, there has been debate on the TMG mailing list as well as on the TMG forum about research tasks. Most of the debate has centered around the fact that the research log really isn't very user friendly, and that it doesn't show in the person detail screen other than if you have an icon on your toolbar, or have the "tasks" column showing in your screen.

I am one of the people who feels that it would be helpful to have it on screen. So I have created a couple of tags that I attach to someone whenever I decide that I want to do some research, or when I have completed the research. What might surprise most of you is that I use this method in conjunction with the research log. Don't ask me why...I can't quantify it for you, I just do. I *think* that at one point it was useful for printing a research log for trips, but I honestly don't remember any more.

So, to start with, the two tags I have set up are these:

Research-TO DO

--Research to do:[CR:][CR:]<[D]><[M]>[CR:][CR:]

And

Research-DONE

--Research done and complete:[CR:][CR:]<[D]><[M]>[CR:][CR:]

In addition, I have one other tag which I find quite helpful:

Research Notes

--Research Note:[CR:][CR:]<[M]>[CR:][CR:]

As you can see from above, I have the double exclusion marker on all my sentences. Obviously, I do not want those printing in an individual narrative or other report.

As for the pros of using a system like this, depending on the research that I need to do, I can even go so far as to create a source for the tag, and when I have completed the research, change the Research-TO DO to whatever tag it is. For example, if I have a will that needs to be looked at, once I have looked at it and recorded the transcription of it, I can change the Research-TO DO to Will and fill in the dates, etc. As I have already created the will as a source, this is very handy.

Below is an example of one of my Research-TO DO tags that is set up in this manner. Note the source attached which is the will for Richard Kent. As I haven't viewed this yet, I still have it listed as a research tag.

Tag Entry

Tag type

Research-TO DO

Principal

1:6114

Richard KENT Sr.

Primary name

Principal

0:0

Primary name

Date:

Place style

U.S. StandardPlace

Sort date:

Memo

WILL-A will is extant, filed on September 26, 1654. File #15378

Addresssee

Country

Detail

Postal

City

Phone

County

LatLong

State

Temple

+

-

+

No more witnesses

+

-

2 citations

1 2 D P M

1:202

WEB Ancestry Website

[ITAL:]Essex, Mass; 2

2

1:124

WILL Kent, Richard Sr.

A will is extant but n 3

3

Sentence

Max surety : 3

3

OK

Cancel

Help

Details					
Type	Name		12DPM	Type	Value
Name	Richard KENT Sr. (6109) (c1620->1654)		2	Reference	Richardson
Father	KENT (13653) (c1598-b1698)		2	Age	Dec'd @ ~34 yrs
Mother			Last edited	07 Sep 2007

Type	Date	Name/Place	Age	S	12DPM	E
* Birth	c _ _ _ 1620	England	~0		
* Freeman	04 Mar 1634	Boston, Massachusetts Bay	~14	✓	2 . 2 2 .	
* Immigration	26 Mar 1634	Was a passenger on the Mary and John	~14	✓	2 . 2 . 2	
* Marriage	c _ _ _ 1640	Emma (wife of Richard Kent Sr.) (6110); England	~20	✓	2 2 . . .	
* Death	bt 1654-1654	Newbury, Essex County, Massachusetts	~34	✓	2 . 2 2 .	
* Research-TO DO	_ _ _ _ _	WILL-A will is extant, filed on September 26, 1654. File #15378		✓	3 . . . 3	

What I like about using tags versus the research log is the ability to actually see your research information on the main person screen, rather than just seeing a check mark in a column.

One con to utilizing this system (which could be why I double up and add tasks to these tags...) is that in order to print a listing of the Research-TO DO information, you have to override (or not include in your sentence structure) the double exclusion markers. In addition, you can only print research for one person per page, as to get it to print you need to utilize a report such as the individual narrative. It isn't possible to just run a list of people with your Research-TO DO tags. You cannot print by repository, and then filter by keywords, etc. as you can when you utilize the research log. There is really no easy way to print a usable research list.

However, if you utilize the research log, that is not a problem, as shown below in the example that I have filtered for all tasks through the FHL (microfilms that I need to order & view), and further filtered for my keyword of Quaker.

Research Log All Tasks for Repository Number 1:5

Task
0020410 PA Philadelphia Quaker Byberry Monthly Meeting
0020415 PA Montgomery Quaker Gwynedd Monthly Meeting
0021673 PA Quaker Abington MM Church Records-Hicksite
0383428 PA Quaker Abington MM BMD 1685-1894 Minutes
0383429 PA Quaker Abington MM Minutes 1746-1797
0383430 PA Quaker Abington MM Minutes 1797-1811 & Gra
192633 PA Montgomery Quaker Horsham Monthly Meeting
20415 PA Montgomery Quaker Gwynedd Monthly Meeting
20416 PA Montgomery Quaker Horsham Monthly Meeting
20453 PA Montgomery Quaker Abington Monthly Meeting
20457 PA Philadelphia Quaker Byberry Monthly Meeting
20462 PA Montgomery Quaker Gwynedd Monthly Meeting
20463 PA Montgomery Quaker Horsham Monthly Meeting
21673 PA Montgomery Quaker Abington Monthly Meeting
383428 PA Montgomery Quaker Abington Monthly Meeting
383429 PA Montgomery Quaker Abington Monthly Meeting
383430 PA Montgomery Quaker Abington Monthly Meeting
383439 PA Montgomery Quaker Gwynedd Monthly Meeting
383440 PA Montgomery Quaker Gwynedd Monthly Meeting
383525 PA Montgomery Quaker Horsham Monthly Meeting
384859 PA Philadelphia Quaker Byberry Monthly Meeting

Subject : Repo #1:5 : LDS Family History Library

Designed : 26 Nov 2005
 Edited : 26 Nov 2005
 Planned : ____
 Begun : ____
 Progress : ____
 Completed : ____

Title: Byberry Monthly Meeting, Philadelphia County, Pennsylvania, 1811-1871

Byberry Monthly Meeting, Philadelphia County, Pennsylvania, 1811-1871

All Tasks for Repository Number 1:5

Focus : A Repository 1:5

Sort : by Task Name

Keyword Filter :

Task Name Filter : Quaker

Count : 25

Add Edit Copy Delete Close Help

Which produces a report looking something like this one page:

1255908 IL Warren Probate Records 1917-1921	
Person:	James Reuben Cubbage (917)
FHL Film:	after 5 Apr 1919 James Reuben Cubbage (917); Probate Records, Warren County, Illinois
Repository:	LDS Family History Library, Family History Library, Salt Lake City, Utah, www.familysearch.org
Designed :	25 Apr 2006

1403705 IL Knox County Probate Records	
Person:	Reverend John Wesley Cubbage (949)
Repository:	LDS Family History Library, Family History Library, Salt Lake City, Utah, www.familysearch.org
Designed :	21 Sep 2005
Memo:	MF Roll: 1403705 #2-3 Title: Index to wills, estates, administrators and executors 1830-1959 Index to guardianships and conservatorships 1960-1971

21356 PA Lancaster Will book E-F 1784-1796	
Person:	Magdalena Barbara Eberly (4011)
Will:	before 9 Apr 1796 Magdalena Barbara Eberly (4011); Will Book E-F, Lancaster County, Pennsylvania
Source:	Lancaster County (Pennsylvania). Register of Wills. <i>Lancaster County, Pennsylvania Will Book E-F 1784-1796</i> . Volume E-F. (Pennsylvania, 1784-1796).
Repository:	LDS Family History Library, Family History Library, Salt Lake City, Utah, www.familysearch.org
Designed :	19 Jul 2005
Memo:	Researching the Lancaster County, Pennsylvania Will Book E-F 1784-1796 Magdalena Barbara Eberly [4011] (Gockley) makes sense because she died on 9-APR-1796 in Cocalico, Clay Township, Lancaster County, Pennsylvania. Some background on Magdalena Barbara Eberly [4011]: She was born in 1720 in (GSEST, Switzerland), and she died on 9-APR-1796 in Cocalico, Clay Township, Lancaster County, Pennsylvania. She married John Gockley [4012] on ABT. 1738. Her parents were Michael Heinrich Eberly [4008] (b. 1682 in Switzerland, d. 1760), and Veronica Ulrich [4007] (b. ABT. 1695 in Switzerland, d. BEF. 1795).

The above report is actually a portion of a task listing for tasks with FHL repository and with IL (for Illinois) in the task name.

Both methods have their pros and cons, and that is why I use them both. Of course, I don't use either one nearly as much as I should, and plan on working on that in the fall when school starts again and I have more time.

In short, I like the ability to see what my tasks and their status is right on the person screen, but I also like to have a tidy output for when I travel to other research locations. At present neither system is any better than the other, it is just a matter of your preferences.