

FAMILY HISTORY DISCUSSION GROUP

Class 4 — How to Prepare to Do Research

Moving from collecting names to focused discovery



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How Did It Go?

CLASS 2 CHECK-IN

FamilySearch & Ancestry

Did you have a chance to explore account linking or look up a family branch in the public trees?

- Any unexpected connections found?
- Questions about navigating partner accounts?

CLASS 3 CHECK-IN

DNA Takeaways

How did you feel digesting your ethnicity estimates or cousin match lists from last session?

- Any surprising ethnicity regions?
- Did you spot a familiar surname in your matches?

No wrong answers here — whatever you got done is progress.

Start Small, Think Big

What We're Covering Tonight

1

HOUSEKEEPING TOPIC

FamilySearch → Ancestry Tree Transfers

A quick look at how the automated tree transfer tool works — and the vital reasons why you might want to proceed with caution.

2

THE REAL FOCUS

Preparation Before Search

How to organize your thoughts, form a laser-focused research question, and start a log before ever typing in a search bar.

How the Transfer Works

Mechanical Walkthrough

- 1

Select Import Option

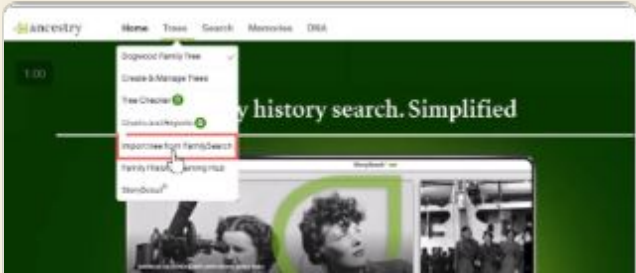
In Ancestry under 'Trees', click *Import tree from FamilySearch*.
- 2

Configure & Import

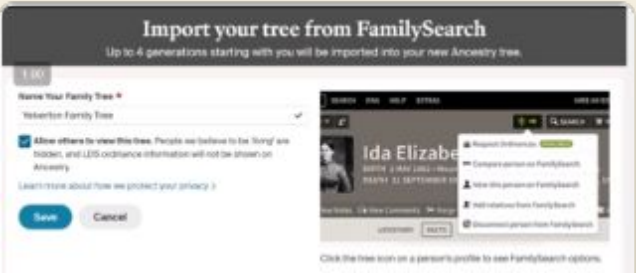
Name your tree and import up to 4 generations from your linked account.
- 3

Completion & Sync

Ancestry notifies you when the 100% transfer complete status is reached.



Step 1: Trees Menu



Step 2: Name & Privacy



Name	Date Modified	Role	Tools
Dogwood Family Tree View tree overview	12/20/2023	Owner	Tree settings Invite family
Falconer Family Tree View tree overview	12/20/2023	Owner	Tree settings Invite family

[Create a new tree](#) [Import tree from FamilySearch](#) [Upload a GEDCOM file](#)

Step 3: Transfer Confirmation (100%)

Verify Before You Trust It

The Public Tree Risk

FamilySearch is one giant shared tree. Unless you've personally verified accuracy back 4 generations yourself, importing it risks adopting someone else's unverified conclusions as fact.

Building in Ancestry forces line-by-line verification.

LIVE EXAMPLE CALLOUT

Levi Edmondson (b. abt. 1765)

FamilySearch shows him attached to **zero historical records**.

Yet Ancestry's ThruLines and DNA matches point toward a completely different lineage!



📌 Here's how to do it — and here's why I'd think twice.

Start With One Question



Who

Who are you researching specifically?



What

What do you know & what do you want to find?



Where

Where did the event take place?



When

When did it occur? (Date range counts!)



Why

Why does this answer matter to your tree?

 **Avoid asking "Who was Grandpa?" — focus on one specific, answerable question.**

Meet Charles Wesley Edmondson

Targeted Research Example

Instead of searching broadly for "all Edmondsons in NC," we build a timeline line-by-line using verified records.

FOCUS QUESTION

"When and where was Charles Wesley Edmondson born, and who were his parents recorded in household records?"

TIMELINE EXCERPT | Subject: C. W. Edmondson

1874 (Birth Entry)

Event: Born in Palmyra Twp., Halifax Co., North Carolina

Source: Family Bible record & subsequent state death index

1880 (U.S. Federal Census)

Location: Palmyra, Halifax Co., NC (Age 6, Son)

Household: Joseph Edmondson (Head, 42), Charity Edmondson (Wife, 38)

Write It Down As You Go

RESEARCH LOG EXCERPT | Halifax Co., NC Series

1880 June 12 — Census Enumeration

Enumerated in household of Joseph Edmondson. Includes wife Charity, children, and nephew **Wm L. Price** (age 14). [1]

💡 **Inline Lead Note:** Wm L. Price (nephew) in household is a potential clue connecting Charity's maiden name to Price! Search Price probate/wills in Halifax Co.

[1] **Citation:** 1880 U.S. Census, Halifax Co., NC, Palmyra Twp., ED 134, p. 12B, HH 104; NARA T9, roll 966.

Key Takeaway

Never trust your memory to remember why a stray name mattered. Capture leads inside your notes right when you see them.



The "Wm L. Price" Aside

Recording this 14-year-old nephew's presence immediately unlocked Charity Edmondson's maiden family 3 years later!

One Document, One Ancestor



Header = Ancestor Name

Top of document lists key identifying details: full name, lifespan, key locations.



Footer = Researcher Info

Include your name, contact, and last updated date so future researchers know who made it.



One Dedicated Document

Maintain one master file per individual — reused, updated, and appended to indefinitely.



Strict Chronological Order

List entries strictly by date of event (not the date you found the record).

Could Someone Follow Your Trail?

SAMPLE CITATION FORMAT

1900 U.S. Census, Halifax County, NC

Palmyra Township, Enumeration District 32, Sheet 4A, Household 68, Family 70; National Archives Microfilm T623, Roll 1200.

Accessed via FamilySearch (film #004117826) on Aug 14, 2026.

CITATION RULE OF THUMB

Source Name + Event Date + Specific Location/Page + Where You Found It



"Could someone 100 years from now follow this trail back to the exact source?"

Start Here — Pick Your Level

Tier 1

The One Question

Pick **one research question** to focus on for the next two weeks. Keep it small, specific, and answerable.

Tier 2

Identify Sources

Identify **who or where** you would look to answer that question (e.g., 1880 Census, county wills, a specific relative).

Tier 3

Start The Log

Start your **research log document** — even just writing the ancestor's header name and question counts as success!

A Few Places to Start



Class 3 Recap & Notes

Review key takeaways on DNA matching & ethnicity estimates.

→[Group Folder](#)



FamilySearch Tree Transfer Guide

Official step-by-step help page on Ancestry/FamilySearch transfers.

→familysearch.org/help



Connie Knox Research Notes Tutorial

Genealogy TV video walkthrough on structuring effective research logs.

→[YouTube Guide](#)

See You Next Time



Cadence
Every 2 Weeks



Recording
**Google Drive
Folder**



Topic Requests
Always Welcome

Start Small, Think Big.

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