

LIVE DEMONSTRATION SESSION

Class 5 — Building a Research Report, Live

Translating raw evidence into an organized, permanent reference document from scratch.

CHECK-IN & REFLECTION

How Did It Go?

LEVEL 1 • EVERYONE

Pick One Ancestor

Chose a single individual as your research focus.

LEVEL 2 • GETTING STARTED

Known Details

Documented confirmed names, dates, and core locations.

LEVEL 3 • STRETCH

Identify Gaps

Formulated one clear, unanswered inquiry question.

LEVEL 4 • GOING DEEPER

Existing Profiles

Examined sources attached on FamilySearch or Ancestry.

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

What We're Doing Tonight

1

Template Walkthrough

Review the purpose and structure of each section.

2

Live Document Setup

Start a real research notes file for Ralph Sutton Naylor.

3

Live Record Extraction

Pull images, transcribe evidence, and cite sources live.

Tonight you'll see exactly what research looks like in practice — not the polished version, the real version.

Your Research Notes Document



1. Header

Subject identification



2. Metadata

Dates & database profile
URLs



3. Notes

Geographic & historical
context



4. Question

Core target of inquiry



5. Timeline (The Heart)

Chronological records, transcriptions & citations



6. Family

Quick-reference relationship tree



7. Footer

Researcher contact for
collaboration

We designed this template together last class. Tonight we fill one in.

Start With What You Know

SECTION 1 Header Block

Name Format: Last name first for consistent digital filing and searchability.

Naylor, Ralph Sutton

Simple, clear, and easy to retrieve across folders.

SECTION 2 Metadata Registry

Document revision dates and persistent links to master online profiles:

 **Created & Updated:** Version control timestamps

 **FamilySearch URL:** Direct profile link

 **Ancestry / MyHeritage:** Secondary tree links

 **Jump straight from notes to live records — zero re-searching.**

Fill these in first. It takes two minutes and grounds the whole document.

Set Your Context, Set Your Focus

SECTION 3 Context Notes

Freeform field for geographic boundaries and historical conditions:

- **County Boundaries:** Track county formation & border shifts
- **Territorial Status:** Territory vs. statehood record offices
- **Record Gaps:** 1890 census loss, burned courthouses

No required format — keep as brief or extensive as needed.

SECTION 4 Research Question

What are you specifically trying to learn right now?

Specific: *"Who were Ralph Naylor's biological parents?"*

Broad: *"What were Ralph's occupations between 1910 and 1930?"*

Keeps you from chasing every rabbit hole.

The research question is your anchor. When you get lost in the records, come back to it.

Section 5: The Heart of the Document

Step 1

Census Scaffold

Drop decade years into the doc:
1900, 1910, 1920, 1930, 1940, 1950.

Step 2

Extract Details

Transcribe the record text: ages,
relations, occupations, residences.

Step 3

Weave Vital Records

Insert birth, marriage, military, death
& news articles chronologically.

Step 4

Footnote Citations

Add source citations immediately as
you transcribe each event.



Why Footnotes Instead of Endnotes?

Footnotes automatically renumber themselves when you insert a newly discovered 1918 record between 1910 and 1920. Endnotes do not.

Start with what's already available. The gaps become your next research questions.

Finish With the Big Picture

SECTION 6 Family Summary

Quick-Reference Snapshot: Parents, spouse, and children with essential birth dates and locations.

- **No citations here:** Detailed citations stay in the Timeline.
- **Built-in checklist:** Every child is a birth certificate to locate.

Your clean, at-a-glance kinship view.

SECTION 7 Document Footer

Attribution & Contact: Your name, relationship to subject, active email/website, and start year.

If you upload this document to FamilySearch Memories or Ancestry Gallery, cousin researchers can reach you.

Turn static notes into cousin collaboration.

The family section also works as a checklist — every child listed is a birth record still to find.

A Few Places to Start



FamilySearch.org

Free record collections, original census page images, and vital index databases.

Free Global Access



Ancestry.com

Census scans, military cards, directories, and newspapers (free access via LDS third-party).

Partner Portal



Salt Lake County Digital Archives

slco.org/Digital-Archives/Vital-Records/details — indexed Utah birth records 1890–1911.

County Repository



matttolman.com

Class 5 recap coming soon; Classes 1–4 recaps and template downloads now live.

Class Hub

The template and Ralph's research notes document will be shared with the group after tonight's session.

ACTION STEPS

Your Assignment This Week

Choose the level that fits your schedule

● LEVEL 1

Everyone

Open a blank Word document. Type the ancestor's name at top and write one research question.

You've started.

● LEVEL 2

Getting Started

Fill Header, Metadata, and Notes sections. Add at least one census year placeholder in the timeline.

Scaffold ready.

● LEVEL 3

Stretch Goal

Pull one census record, transcribe it into your timeline, and insert a footnote citation.

First evidence locked.

★ LEVEL 4

Going Deeper

Populate Family summary from census findings. Note missing elements as your next inquiry question.

Next question defined.

