

Consult Via...Explore With...Discover Through...Literature Reviews!

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Board for Certification of Genealogists
Joy Reisinger Memorial Lecture Series

Objective

The objective of this session is to learn how to create and use a Literature Review (Lit Review) as a new approach to genealogical problem solving. Lit Reviews can not only uncover new methodologies when stuck on a brick wall problem but also reveal additional resources to consult for more general topics.

Session Tools

- Handout
- Instructions for accessing databases (Appendix A)
- Literature Review Worksheet (Appendix B)
- Literature Review Case Study found at: www.genealogylogically.com/lit-review

Purpose of the Literature Review

Performing a Literature Review sounds a little dry, right? But, genealogy researchers love information... knowledge...expertise! “Dry” is where genealogists live and thrive! A Lit Review is just a new way to do that. Conducting a Lit Review can be done anytime, but it is especially helpful when stuck in front of a brick wall or when exploring general topics such as a new geography, ethnicity, religion, and more.

Think about a Lit Review as finding a new methodology for solving genealogical challenges. Instead of hoping to discover a new record to answer the research question, learning a new approach to it may advance the research.

A Lit Review helps to enhance education about many topics germane to genealogy research. Consider these, as just some of many, possible ideas categorized as brick walls and contextual research below:

Brick Wall

- Finding parents or siblings of ancestors
- Identifying the origins of an ancestor
- Merging and separating identities
- Determining ancestor activities
- Researching ancestors with common surnames
- Name changes

Contextual Research

- Case studies by evidence type such as indirect, negative, or conflicting
- Finding living individuals
- Writing a genealogically based biography or family history
- Researching in urban areas or any new geographic location
- Legal customs
- New record groups such as military, probate, deeds
- DNA case studies
- Religious practices and customs
- Migration patterns of an ethnic group

How to Conduct a Literature Review

There are five steps in conducting a Literature Review. Iterating the steps maximizes results.

1. IDENTIFY AND BREAK DOWN THE RESEARCH QUESTION OR BRICK WALL

This first step is applicable when there is a research question and/or a brick wall. First document the research question (or brick wall).

Research questions should be specific, and they most often target identifying a relationship, an identity, or an activity, of the research subject. Typical research questions often read like these examples:

- *Relationship example:* “Who was the father of Jane Doe, who was born around 1825 in New York, who died 05 September 1889 in Greensboro, North Carolina, and who married John Smith?”
- *Identity example:* “Which John Smith married Jane Doe around 1847 in Greensboro, North Carolina?”
- *Activity example:* “Did John Smith, who was born in 1823 in North Carolina, and who married Jane Doe around 1847 in Greensboro, North Carolina, serve in the Civil War?”

Then, break down the brick wall into as many different challenges or issues as possible. Describe the situation. For example, in the “who was the father of Jane Doe” question above, some ways to break it down may include:

- No men with the Doe surname have been found in records around the time Jane Doe was born in New York.
- No men with the Doe surname have been found in North Carolina records around the time Jane Doe married.
- Birth, marriage, and death records were not created in those geographic areas at this time, are no longer extant, or do not name Jane Doe’s father.
- A bible record documenting Jane Doe’s 1847 marriage is the earliest record found.
- How, when, and with whom, did Jane Doe migrate from New York to North Carolina?

2. DEFINE THE LITREVIEW TOPIC

The second step may be a continuation point from the first step if brick walls and research questions are involved. However, it can also be a starting point if there is a more general, often contextual, objective.

Contextual research will be more general than research questions and may be phrased like these examples which also relate to the Jane Doe paternity research question:

- Determine which ethnic and/or religious groups migrated from New York to North Carolina in the early 19th century.
- Identify relationship case studies that have been solved with a common surname like Doe.
- Find methods for solving relationships in southern research with burned counties.
- Pinpoint example resources that solve relationship questions using the FAN Club.

Topics that may not be related to specific research can also be the reason to conduct a Lit Review. Examples:

- Write DNA proof arguments.
- Determine inheritance laws of a certain time and place.
- Understand economic drivers and other push and pull factors for a religious or ethnic group.

3. CREATE KEYWORD PHRASES

To effectively search most databases, keywords and keyword phrases are needed. Just like a search utilizing an internet browser, the better the keywords, the more accurate the results. Effective keyword strategies include:

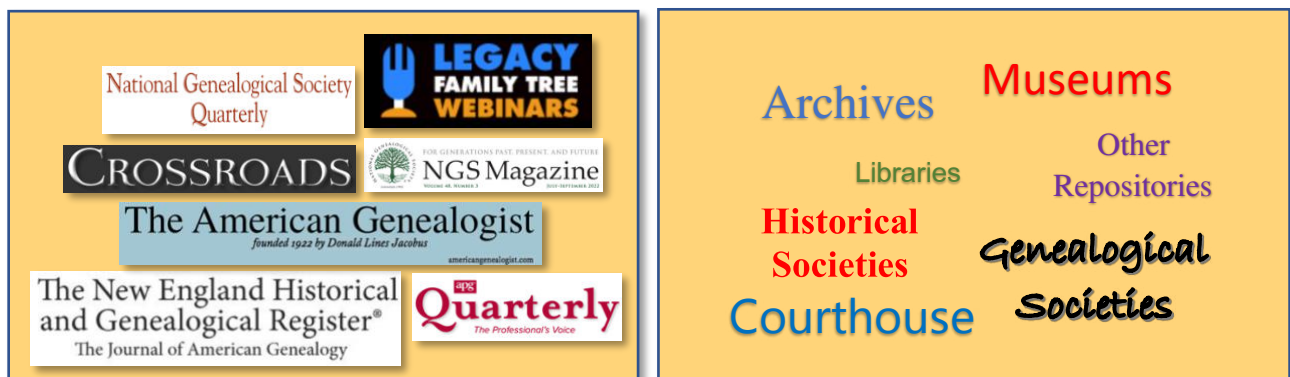
- Start narrow then broaden the keywords and phrases
- Vary the spelling
- Try abbreviations
- Test different combinations of two, three, four or more keywords
- Use quotation marks if any combination of the words should be precisely sequenced

Keyword examples for the “who was the father of Jane Doe” research question with the common surnames as the Lit Review topic could include these words: common, same name, common surname, identity, multiple, and more.

As new keywords and phrases are identified, add those to the list. This is an iterative process also used in conjunction with step #4.

4. IDENTIFY RESOURCES AND SCAN TITLES AND ABSTRACTS

Identify an initial set of resources that may provide information about the targeted Lit Review topic. These may include magazines, journals, books, webinars, and other sources. Consult the broad resources, such as the ones listed below on the left. Also explore local or regional resources—by county, region, city, or town—like the ones shown on the right below. Determine which of those repositories may have resources that cover your Lit Review topic.



Use the keywords to search within each resource and its database (see Appendix A for access instructions for all the resources listed in the lefthand box above). Then:

- Scan titles, abstracts, and introductions, to include or exclude it.
- Skim each resource and determine its relevancy. Then either add to the list to read or watch fully, or eliminate it if it does not have material for the targeted Lit Review.

5. READ ARTICLES & WATCH WEBINARS – CONSULT, EXPLORE, DISCOVER!

Now it's time to discover! Consult each of the resources that were identified. Then explore them. Each article or video may have something to offer. Take notes. Make observations. And capture any of the following specifics that were used, that could be applied the targeted research question, brick wall, or contextual research. These may include:

- Approaches to the problem
- Techniques for correlation
- Methodologies to solve
- Additional resources to consult (from citations or bibliography)

Utilize what was learned from those resources for your own brick wall or contextual research. Literature Reviews can help solve brick walls or learn about general topics. Follow these five steps and then...

Consult. Explore. Discover!



An example Case Study is available at this URL, or scan the QR code:
www.genealogylogically.com/lit-review

Reference List



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_____. “QuickLesson 8: What Constitutes Proof?” *Evidence Explained: Historical Analysis, Citation & Source Usage*. (<https://www.evidenceexplained.com/content/quicklesson-8-what-constitutes-proof> : accessed 08 October 2021).


Appendix A – Instructions for Database Access


The resources described here are commonly used general resources for researchers. The list is not exhaustive; there are additional regional and local publications and resources that should be considered for Lit Reviews.


To search within a downloaded or online PDF:


- Windows: CTRL+F (Control and F key)
- Mac: CMD+F (Command and F key)

Publication	<i>The American Genealogist “TAG”</i> 
URL	www.americangenealogist.com
Cost	\$40 for 3 or 4 issues (perhaps published quarterly but not predictable) Back issues available at \$12 each.
Focus	Compiled genealogies and analyses of genealogical problems.
How-To	<p>There is no online access to issues other than what is noted for volumes 9-87 on www.americanancestors.org described below. Once subscribed to TAG you will receive issues by mail. Back issues may be available at a library or by contacting TAG at subscriptions@americangenealogist.com.</p> <p>Indices for volumes 9 through 84 covering volumes 9-85 and years 1932-2011 are found here in a free searchable PDF: https://americangenealogist.com/wp-content/uploads/TAG-Consolidated-Contents-Cook.pdf</p> <p>Indices for volumes 86-91 for years 2012-2021 are not available on the TAG website. A cover-with-article-titles-only PDF is available and searchable by keyword here: https://genealogylogically.com/the-american-genealogist-1</p>


Publication	<i>The Association of Professional Genealogists Quarterly (APGQ)</i> 
URL	https://www.apgen.org/cpages/apgq-archive
Cost	Free to APG members; membership \$120/year. Separate subscription without membership \$60/year. Back issues available online once subscribed.
Focus	Oriented toward education, writing, publication, research skills and managing a genealogy business.
How-To	<ol style="list-style-type: none"> 1) Login in and then from the home page, go to <i>Publications</i> drop down menu item. 2) Click <i>APG Quarterly</i> for a description of the publication. 3) From the Publications drop down menu, click <i>APGQ Archive</i>. This 1979-2019 index is a downloadable PDF from the dropdown 'Publications' menu item. 4) For issues 2019 to present, browse by issue on the APGQ Archive home page. 5) In the PDF index, online or downloaded, perform searches by: <ol style="list-style-type: none"> a. Keyword b. Category (e.g., Methodology, Marketing, Writing) c. Browse by issue 6) Once you've identified an article in an issue, download that issue's PDF from the APGQ Archive home page.


Publication	<i>Crossroads</i> – Utah Genealogical Association 
	Select <i>Publications</i> in left navigation bar for: https://ugagenealogy.org/fileDownload.php?sid=2
Cost	Free to UGA members; membership \$35/year. Published quarterly. Back issues available online once subscribed.
Focus	Varies greatly from methodology to record groups to tips and tricks.
How-To	1) Login then click on <i>Publications</i> in left navigation bar which then expands selections below it. 2) Staying in left navigation bar, click <i>Index</i> under <i>Publications</i> . <ol style="list-style-type: none"> Perform a search by topic, author, title, or keyword Select a result and click, note the publication year and month. 3) Return to <i>Publications</i> in left navigation bar and click. <ol style="list-style-type: none"> Scroll down and click on the Crossroads button. Then find the month and year of the issue you noted and click on it (e.g., May 2021). A PDF automatically opens for you to search or browse and then you can also download it to save.

Publication	<i>Legacy Family Tree Webinars</i> 
URL	https://familytreewebinars.com/
Cost	Free to view current live webinars. \$49.95 / year provides access to the entire library of more than 1,800 past webinars with syllabi.
Focus	Everything (truly!)
How-To	1) Once logged in, go to the <i>Webinar Library</i> and use the search box for keywords or presenters. 2) Or browse by category such as BCG, DNA, Canada, Software, and more.

Publication	<i>New England Historical & Genealogical Register</i> <i>“The Register”</i> by American Ancestors 
URL	www.Americanancestors.org
Cost	\$99.95 / year for record and publication access. Back issues accessible.
Focus	Genealogical sketches, vital records of new England families. The membership and its database include records as well as issues of The Register for 1874-present and other genealogical publications. <i>The American Genealogist</i> , (“TAG”) for volumes 9-87, also included. The most recent ten are not included (see separate TAG entry). <i>New York Genealogical & Biographical Record</i> (“The Record”) volumes 1-54 covering years 1870-1923 also included.

How-To	<p>Think of this site as a library, not just a journal's publication site. There are many resources on how to search this rich, yet complex, site. To perform a general search of all databases.</p> <ol style="list-style-type: none"> 1) Login and go to <i>A to Z List of All Databases</i> 2) Perform a general search based on <i>Keyword OR Browse by volume</i> 3) Select <i>Search by Database Name</i> to only go to <i>The Register</i>. 4) In the Search All Databases shaded box, select <i>Database</i>, and choose <i>New England Historical & Genealogical Register</i> from the dropdown list. 5) Perform a search based on name, location, keywords, category and more.
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Publication	<i>National Genealogical Society Magazine</i> 
URL	www.ngsgenealogy.org/
Cost	<p>Included with NGS membership; \$75 / year</p> <p>Published quarterly with back issues available online starting from 2005.</p>
Focus	Records, research techniques, repositories, technology, and writing.
How-To	<p>The index appears to no longer be offered by NGS. Alternately, access to an index here: https://genealogylogically.com/ngs-magazine-index.</p> <p>Search that PDF index for any keyword, title, and author. Use that, or browse issues by year and volume here, once logged in: https://www.ngsgenealogy.org/magazine/archives/</p> <p>Archived issues are online from 2005 to present.</p> <ol style="list-style-type: none"> 1) Click on the quarter and year. 2) The issue will present as an online PDF to view or download.

Publication	<i>National Genealogical Society Quarterly "The Q"</i> 
URL	www.ngsgenealogy.org/
Cost	<p>Included with membership to NGS; \$75 / year</p> <p>Published quarterly with back issues available online starting from 1912.</p>
Focus	Case studies and methodology.
How-To	<p>Start here: www.ngsgenealogy.org/ngsq/</p> <ol style="list-style-type: none"> 1) A free index (membership not required) is available by article title and/or author only (not keyword) http://hodges-hodge-society.org/ngs/NGSQsearchForm.htm 2) After search results are presented, note any issue and volume of interest. 3) Return here: www.ngsgenealogy.org/ngsq/ 4) Click on the blue box labeled <i>Archives</i>. 5) Scroll down to desired year and issue then click on it. 6) The issue will present as an online PDF that you can view or download.

Appendix B - Literature Review Worksheet

Refer to the handout for more information and instruction.



1. IDENTIFY THE BRICK WALL AND BREAK DOWN:

2. DEFINE THE LITREVIEW TOPIC:

RQ: _____

Topic(s): _____

3. CREATE KEYWORDS AND KEYWORD PHRASES:

_____	_____
_____	_____
_____	_____

4. IDENTIFY RESOURCES AND SCAN ARTICLE TITLES & ABSTRACTS:

- | | |
|--|--|
| <input type="checkbox"/> The American Genealogist | <input type="checkbox"/> The Register |
| <input type="checkbox"/> APG Quarterly | <input type="checkbox"/> NGS Magazine |
| <input type="checkbox"/> Crossroads | <input type="checkbox"/> NGS Quarterly |
| <input type="checkbox"/> Legacy Family Tree Webinars | <input type="checkbox"/> Other: _____ |
| | <input type="checkbox"/> Other: _____ |

Consider national, regional, and local opportunities.

- ☐ Identify potential articles by scanning the titles
- ☐ Skim articles to further refine choices to include or exclude in your Lit Review

5. CONSULT. EXPLORE. DISCOVER!

- ☐ Approaches to the problem
- ☐ Techniques for correlation
- ☐ Methodologies to solve
- ☐ Additional resources to consult (from citations or bibliography)