

## Ancestor Profile Makeover

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## Video Link

### Getting Started

How many times have you returned to your research wondering where you left off last time you worked on your family tree? Then you get distracted by hints and items the home page teasing you to go in different directions. Here are some tips and tricks I use to **jump right back into my research** without wasting any time and to **get organized BEFORE research begins**.

Anytime I am returning to my genealogy research there are a few things I do. There are several ways to do the same thing, this is me, *you do you*. The first thing I do is what I call the **Ancestor Profile Makeover**.

You can do this same process on FamilySearch; I am using **Ancestry** as a demonstration as that is where my main “go to” tree is located.

### Use MyTreeTags on Ancestry to Locate Your Last Ancestor Worked

#### Creating Tree Tags

- 1) Determine on whom I was working. I use the LEFT OFF HERE custom tree tag to remind me. The trick is, you need to remember to create and use the tree tags.
  - a. In the profile view, use the **pencil icon** near the top under your ancestors name to open the **MyTreeTags®** menu (side panel).
  - b. Click **Edit** at the bottom of the side panel.
  - c. Choose **Create a custom Tag** with the Dropdown Menu.
  - d. Click the **+ button** at the top to create your own tree tag. I have created several, one is LEFT OFF HERE.

The screenshot shows the profile page for Mary C Hale on Ancestry. The profile includes a photo of a gravestone, her name, birth and death dates and locations, and a relationship note: "2nd great-grandmother". Below the profile information, there are several action buttons: "Merge with duplicate", "Print", "Member comment", "Check facts PRO", and "Charts & reports PRO". A red arrow points from the "LEFT OFF HERE" tag in the profile to the "LEFT OFF HERE" tag in the "MyTreeTags" side panel. The side panel also shows a "Create a custom tag" button and a list of existing tags: "Biological Line", "Civil War", "Floating Tree", and "LEFT OFF HERE".

## Searching for Tree Tags

- 2) Returning to the main tree view use the click **Find in Tree** in the upper right corner.
  - a. Click Filters
  - b. Open Custom Tags**
  - c. Click on **LEFT OFF HERE** and you will get a list of everyone in your tree that you have given the LEFT OFF HERE tag.
  - d. Clicking on the ancestor will take you to their location in the family tree.

TIP: Keep one tab open on your browser to have the tree for quick reference.

The screenshot shows a family tree interface. At the top right, the 'Find in tree' button is highlighted with a red box. Below it, a search bar is visible. The search results are displayed in a list, with the first item 'LEFT OFF HERE' highlighted in red. Below this, there are three search results: 'Jesse Henley 1725 - 1801', 'Mary C Hale 1840 - 1876', and 'Margaret Clark 1794 - 1865'. A red arrow points from the 'LEFT OFF HERE' tag in the search results to the 'Mary C Hale' entry in the main tree view.

## Open the Research Notes for the Ancestor

In a separate tab, open your text document (I use MS Word) to keep Research Notes. If you do not have research notes for this ancestor, I suggest you start one for each direct line ancestor or for any special problem area you are working on. Keep one set of Research Notes per ancestor.

Keep your research notes in **Chronological Order**, starting with the date for each record found.

## Working the Ancestry Profile

Remember, this is an ancestor you are actively working, so nothing is perfect. This is what I call the “ancestors workup.”

## Cleaning up the Facts Column

Here is where you can clean up your ancestors profile. You will want to remove any duplicated facts from the left side fact column, but there are a few things we should do first. Again, this is how you do this on the Ancestry site.

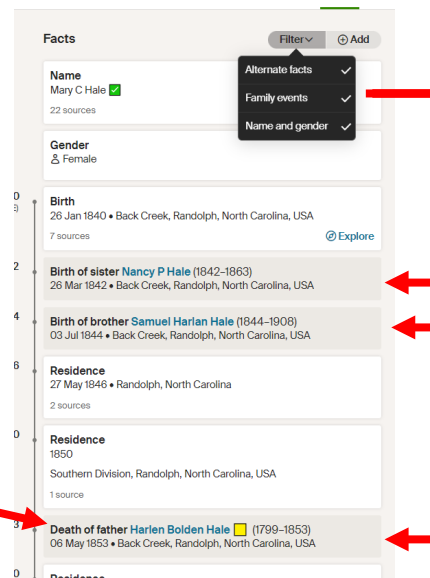
### Turn Off Family Events

First, **turn off the family events** from the fact column under the filter dropdown menu.

These are the events of other family members in the tan colors. They are siblings, children, and parents etc. It might say **Birth of Brother** or **Death of Father**.

This becomes confusing as users try to edit these family events from the current ancestor profile.

Let us say there is a family event that says, **Death of Father** but you realize the date is wrong. You cannot edit it here (as shown), you need to **click on the father's name** to pop over to the **father's profile and fix it there**. Then you can return to the ancestor you were working on to finish your work.



### Turn On the Name & Gender Filter

You want to have the filter, **Name & Gender** turned on in case you have duplicated names. In this case, some records for Mary Hale have her middle initial as C and some as G. For now, while we are working on this ancestor, we will set Mary G. Hale as the preferred fact. This will show at the top of the screen.

### Set Preferred Name

To set a name as preferred, **hover over the name in the left side fact column**, until the edit button appears, then **click edit**. Then click the Preferred box at the bottom of the popup window. This will change the name at the top of the profile view to the preferred name.

**Emoji Trick** in Suffix field. Put your cursor in the field and right-click and choose emoji to select one. Only do this in the suffix field so it does not mess with search or hinting functions.

## What Facts are Attached to What Sources?

Before we can delete facts, we need to make sure that the fact is “drawing” to the correct sources. Below we see two death facts with two different dates. Reviewing those sources can help determine with fact is correct and which one is not.

Notice that both Death Facts draw to the Find-A-Grave Source. Let us drill into the Find-A-Grave website and determine what it says. Always open the full document or website to get all the details.

The screenshot shows a genealogy profile for Hill Kiah Winslow (1831-1901). It displays several facts: Marriage (13 Aug 1864), Mary Winslow Tombstone (7 Mar 1870), Residence (1870), and two Death facts (24 Mar 1876 and 7 Mar 1876 Alternate). The sources for these facts include OneWorldTree, U.S. Encyclopedia of American Quaker Genealogy, U.S. Find A Grave Index, and U.S. Quaker Meeting Records. Red arrows indicate the flow from the facts to the source list and then to the expanded source view for the 1876 Alternate death fact, which shows a source from U.S. Find A Grave Index.

Opening Find A Grave for Mary G. Hale showed us that her tombstone says she died on 7 March 1876. Whether this is right or wrong, we want to associate the death fact that matches the source and remove the other source from the death fact.

## Removing Sources from Facts

There are **two ways to disconnect sources from facts**. One is to **open the fact and remove the source** and the **other is to open the source and remove the fact**. Either way works. We are going to open the fact and remove the source. **Open the Fact** for the source that needs to be removed by clicking **Edit in**

The screenshot shows the 'Edit death' interface for Mary C Hale (1840-1876). It displays a list of source citations attached to the death fact. The sources include 'U.S., Find A Grave Index, 1600s-Current', 'OneWorldTree', 'U.S., Quaker Meeting Records, 1681-1935' (Earlham College; Richmond, Indiana; Quaker Marriage Records; Collection: Miscellaneous Vital Records), and 'U.S., Quaker Meeting Records, 1681-1935' (Guilford College; Greensboro, North Carolina). A red circle highlights the 'X' button next to the 'U.S., Find A Grave Index, 1600s-Current' source, indicating the step to remove it.

**the Fact**. Click **Attached Source** (even though we are removing a source here). To **remove the source**, click the **X** in the top section and it will animate to the bottom under the Other Sources section.

You want to repeat this step for any source that does not match the fact.

You will also want to repeat this step for all facts in the ancestors profile.

## Adding Sources

Should you want to add a source, you can do so on the same screen by clicking the plus button in the bottom section next to the source you wish to attach, and it will rise to the top.

Your choices here will save automatically, so you can close with the X in the upper right corner of the popout screen.

## Delete Duplicated Facts

Once you have your facts attached to the correct sources, now you are ready to remove duplicated facts. The procedure is the same for any fact. Once you open the fact simply delete it.

The screenshot shows a web form titled 'Edit birth' for a person named Mary C Hale (1840-1876). The form has several sections: 'Edit fact' with sub-sections for 'Date' (26 Jan 1849) and 'Location' (Randolph, North Carolina, United States), a 'Description' field with a placeholder 'Enter an optional description of this event', and a 'Preferred' checkbox. At the bottom, there are 'Save' and 'Close' buttons, and a 'Delete' button which is circled in red.

## Cleaning the Source Column

Next, I work on the Source Column (middle column) for anything I had previously attached. It is easiest to start from the top and work to the bottom of the list. However, be sure you are **adding to your research notes as you go in chronological order** which may or may not be the order in the source column.

Open each document fully, drilling into the image if it is available. Abstract what you see into your research notes starting with the **date**, then **item** title, then **details**. The idea here is that you are capturing the key details, it does not need to be in full sentences, nor does it have to be perfect unless you wish it to be. I promise, using research notes in this way will help you see details you never noticed before.

### Use Source Citations

Again, this does not need to be perfect unless you are a professional genealogist. Think for a moment, if you were to come back to this record five years from now asking yourself “Where did I get that information?” Could you retrace your steps. Give yourself the steppingstones now while you know the path. Below is a paragraph from my research notes. I forgot to put a source citation at the end.

10 Jul 1860 U.S. Census – Mary is 20 years old living in the household of her mother Sarah Hale W. (possibly meaning widow). Sarah is 60 years old. She is farming on \$4200 of real estate. There are Nixon’s and Spencer’s as neighbors. Mary was born in NC. This is the Western Division of Randolph County.

Here I created a source citation in seconds using cite-builder.com to add as a footnote.

1860 U.S. census, Western Division County, North Carolina, population schedule, Randolph County, page 13 (Penned), dwelling 420, family 411, Mary Hale; imaged, “1860 United States Federal Census,” *Ancestry* (Ancestry.com : accessed 13 July 2024).

## Adding Source Citations

Again, I use **MS Word** to add sources to the **footnotes** of every page. You do not want to use endnotes. Endnotes, go to the back of your document and footnotes stay on the same page as the reference. This way if someone should copy just one page of your document, the sources stay with the paragraph on the same page.

### *Do you cite every source?*

You do until you have a better source. For example, let us say you find a death index. Later, you find a death certificate. The death certificate is the better source since it is an official or an original document. Personally, I do not bother removing the index source, but as a professional, if I were writing a client report, I would only provide original or best known sources.

## Add Footnotes Using Word

- Put your cursor at the end of the sentence, paragraph, or item to reference.
- Click the Home Tab,
- Click the References Button in the Ribbon
- Insert Footnote
- Type your footnote or paste it in from another source.

If you don't want to learn how to create source citations, copy and paste the source information from the website (Ancestry, FamilySearch, MyHeritage) etc. or use a citation builder like [cite-builder.com](https://cite-builder.com). I use cite-builder often since it is fast and easy. There is a free option for this website.

### *About URL's or Hyperlinks*

URL (website addresses) or hyperlinks can break. Use them as a second source after typing the citation path to finding the records.

## Professional Source Citations

If you want to learn how to write source citations, I recommend you purchase a copy of [Evidence Explained by Elizabeth Shown Mills](#) (affiliate link on Amazon). This is the standard that all professionals use for sources.

## Working Hints

After cleaning up facts, sources and adding to your research notes all that you have on hand, next I work the hints list from the ancestor profile view. However, the first thing I do when I go into hints is to **ignore member trees**. Why? Because I do not want to introduce errors from other member trees, but **more importantly** I do not want to be influenced by other genealogists conclusions. I do not want any confirmation bias either.

**Confirmation Bias** is when you are trying to fit the evidence to prove your hypothesis. Instead, you want to conclude what the evidence tells you regardless of your suspicions.

I want to review all the evidence and come to my own conclusion first, then in the end, I can compare my findings with other family historians to see what records or conclusions they came to.

**Mary C Hale**  
in [redacted] Family Tree

Birth	26 January 1840 Randolph County, North Carolina, United States of America
Death	7 March 1876 Shelby, Cleveland County, North Carolina, United States of America
Father	Harlen Bolden Hale
Mother	Sarah Henley

Show more family (2)

**Ignore Member Trees  
Until the Last Step**

Review Ignore

## Remove Duplicate Sources

Next you will want to move to the Source (middle) column and **remove duplicate Sources**. You will want to open every source document fully as some will appear to be the same, even though they are different. This is because many records will fall into the same collection. Pay attention to dates and places, as they may change from record to record.

Here we have two of the same record and one is different, but all three are from the same collection. While the thumbnails might be a clue, they are the same record, be sure to open the images to make sure they are in fact the same and not two different records.

Even though I have several marriage indexes and records, you want to keep all of them if they are not a duplicate of the same record.

North Carolina, Marriage Records, 1741-2011

**Same**

North Carolina, Marriage Records, 1741-2011

North Carolina, Marriage Records, 1741-2011

Source citation for North Carolina, Marriage Index, 1741-2004

Ancestry record North Carolina, Marriage Index, 1741-2004

Citation details View image View record

Associated facts

Media

Name Mary Hale  
Gender Female  
Spouse H K Winslow  
Spouse Gender Male  
Marriage Date 29 Sep 1863  
Marriage County Randolph  
Marriage State North Carolina

Close Remove

If you were authoring a professional research report, then you would only cite the best record (typically an original) for each fact.

To **remove duplicated sources**, the function is the same as removing facts. Simply **open and "remove."**

## Adding to Research Notes

This is **not a step to save to the end** but is a step I take as I work through every record. Adding each record as an abstract into a chronologically ordered document (Research Notes) will help you make new discoveries and help you create your research plan.



Keeping Research Notes is beyond the scope of this lesson but is a game changer if you want to sharpen your research skills.

## Researching Records

Once you have cleaned up your ancestors profile and created some Research Notes for this ancestor, let the research begin!

By this point you have an idea of what crucial details are missing. It is time to find them.

### ***Plan Your Research and Research Your Plan*** - Connie Knox

## Checking Member Tree Hints

This is one of the last steps I take in my research is to check other Ancestry member trees. After I have cleaned up the ancestors profile and added everything to my research notes, I will check the Member Trees to see if there are any records I missed.

**Tip:** Look in member tree galleries as sometimes records are uploaded as images.

I will also look at FamilySearch, MyHeritage, and WikiTree to see if there are any easy records or sources to find, that I do not already have.

A full research plan is, again, beyond the scope of this lesson.

## DNA Cousins (Branch Specific)

The very last thing I do, if needed, is to check for **DNA cousins from the branch of the tree** I am researching. In short, I will find my “best known match” from that branch of the tree, review the shared matches, and group them into clusters from the targeted branch of the tree. Then research the trees of the DNA cousins from that branch. How to do this step is another video for another day.

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