OPERATION GRANNY FILES

The Field Manual

A research log, a citation card, a lane, a shelf, a calendar, and a handoff page — the system that carries your research for the next twenty years

Field Guide & Quick-Reference

Mission 40: The Family Historian's Field Manual

Clearance Level: Biscuit-Tin Operative

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QUICK-GRAB SUMMARY

This mission didn't teach a new record type. It taught the infrastructure that makes every record type you've already learned keep paying off: a research log that remembers what you searched (including the empty searches), a one-page research plan, a personal citation card, a chosen specialty lane, a small reference shelf, a maintenance calendar, and a handoff page so the next family historian inherits a working system instead of a shoebox. Fill in one section per sitting. Start with the log — today, not "someday."

Section 1 — Research Plan and Research Log

Two documents, two jobs. The **plan** is what you intend to search, and why, written *before* you start. The **log** is what you actually did, entry by entry, as you go. The plan is the map; the log is the trip odometer.

Part A — One-page research plan

My research question: _____

What I already know (facts with sources): _____

Sources I mean to check: _____

Priority order (and why): _____

Part B — Research log

Date	Source Searched	Repository	Result	Next Step
__/__/____				
__/__/____				
__/__/____				
__/__/____				
__/__/____				
__/__/____				

Example entry, from the mission:

Date	Source Searched	Repository	Result	Next Step
(8 months ago)	County naturalization index, 1880-1889	Microfilm, courthouse annex	No match under Petersen or variant spellings	Check federal district court records instead of county

GRANNY PRO TIP

Log the empty searches. "No match" is the entry you'll be most grateful for, because it's the one that stops you from re-running the same search when an old index reappears online wearing a shinier interface. And add a one-word flag for source quality — original or derivative, primary or secondary information — so you remember later why you trusted (or didn't trust) a result.

Section 2 — My Citation Standard Card

Citation is an art, not a science. The goal isn't perfect adherence to a style manual — it's a consistent, complete, personal format you'll still be using five years from now. Write each format out once below, then use it every time. For the field's authoritative reference, see Elizabeth Shown Mills, *Evidence Explained*.

Source type	What to capture	My format (write it once)
Census record	Year, jurisdiction (state, county, town), household head, page or sheet, where you viewed it	
Vital record (birth, marriage, death)	Record type, person, date, issuing office, certificate or register number, where you viewed it	
Church register	Parish, record type, person, date, volume and page or entry, where you viewed it	
Probate file	Court, county, decedent, file or case number, document within the file, where you viewed it	
Online database entry	Database title, website, the original source it indexes, date you accessed it	

BONUS INSIGHT

A simple shorthand applied every single time beats a beautifully formal citation written once and never again. If a format stops working, revise the card — it's a living document, not a one-time assignment.

Section 3 — Specialty Selection Guide

Specialization is a natural next step, not an obligation. Most researchers find their lane the ordinary way: by noticing which missions they bookmarked to revisit. Tick the ones that pulled you back.

Volume 2 mission	Lane it points toward	Bookmarked it?
Crossing the Ocean	Scandinavian and Nordic research	☐
Frozen in Time	Photos, artifacts, and oral history	☐
Graveside Intelligence	Cemetery records	☐
Before the Revolution	Colonial and pre-1850 research	☐
Building a Legacy	Preserving and publishing your research	☐
Her Name Was Lost	Women's records	☐
The Machine Reads the Handwriting	AI transcription and full-text search	☐
Crossing the Channel	England and Wales	☐
When the Records Burned	Ireland, Scotland, and record substitutes	☐
The Surprise in the Spit Kit	Genetic genealogy and DNA surprises	☐
Passing It Down	Bringing young people into the work	☐
The Shared Tree	Collaborative trees and FamilySearch	☐
The Norwegian/Danish Line	Norwegian and Danish parish records	☐
Raíces	Hispanic and Mexican research	☐

The lane(s) I'm choosing: _____

Why this one keeps pulling me back: _____

GRANNY PRO TIP

You don't have to pick just one, and you don't have to feel ready. One honest afternoon looking at what you actually enjoyed is all the permission you need. For anyone who wants a long-horizon path beyond hobbyist work, the Board for Certification of Genealogists' Certified Genealogist credential exists — but a real specialty doesn't require it.

Section 4 — Reference Shelf Starter List

A small, curated shelf, kept current and opened on purpose. Three anchors belong on every shelf, whatever your lane.

Reference	What it's for	Have it?
FamilySearch Research Wiki	Free, continuously updated guidance organized by place and record type — your first stop in any new specialty	☐
Evidence Explained (Elizabeth Shown Mills)	Your standing citation reference, whatever the lane	☐
A specialty society for your lane	Community, journals, and updated guidance over time	☐
		☐
		☐
		☐

Section 5 — Maintenance Cadence Calendar

Every piece of this system degrades without a rhythm. Tie each task to a date you'll actually notice — a birthday, New Year's, an anniversary — instead of trusting willpower.

Task	How often	Attached to (a date I'll notice)	Last done
Log review: any stale open questions worth revisiting now that new records exist?	Quarterly		
Shelf refresh: any new edition or resource in my specialty?	Annually		
"If I'm gone tomorrow" document check-in (from Building a Legacy): has anything material changed?	Annually		

Task	How often	Attached to (a date I'll notice)	Last done
Backup routine (from Building a Legacy)	As set in that mission		

BONUS INSIGHT

If updating your log takes fifteen minutes after a ten-minute search session, you built the wrong log. Simplify until the system costs less time than the research it protects.

Section 6 — The Handoff Page

A research practice with a log, a citation standard, and a shelf is dramatically easier to hand to someone else. This page doesn't replace your Building a Legacy planner — it points the next person to the system.

Who inherits my research: _____

Where my research log lives: _____

Where my citation card and shelf live: _____

My specialty lane, in one sentence: _____

My most important open question right now: _____

Young researcher I've brought in: _____

Date this page was last updated: _____

Section 7 — Volume 2 Self-Assessment

This isn't a test, and there's no passing score. It's a "look how far you've come" instrument. Tick the column that fits you today.

Competency	Just starting	Getting comfortable	I can teach this
I read records in at least one Volume 2 specialty	☐	☐	☐
I weigh evidence the GPS way before calling it proved	☐	☐	☐
I plan, then log every search — even empty ones	☐	☐	☐

Competency	Just starting	Getting comfortable	I can teach this
I cite in one consistent format	☐	☐	☐
I've named a specialty lane (or two)	☐	☐	☐
I keep a small shelf and use it	☐	☐	☐
My upkeep dates are on the calendar	☐	☐	☐
Someone could pick up my research	☐	☐	☐

The skill I'm proudest of from Volume 2: _____

GRANNY SAYS

"A research practice isn't the one you build once. It's the one you keep — and today, you finally built one worth keeping."

Notes

Use this space for personal notes and discoveries.