



Research Documents and Letters With Artificial Intelligence

Rootstech Webinar

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Speaker

Mark Thompson is a professional genealogist who specializes in digitizing and archiving family memorabilia, and genetic genealogy.

Prior to becoming a genealogist, Mark served in leadership roles in information technology. He worked in several industries to introduce technologies that improved the way those companies worked.

Mark leverages his combined expertise in genealogy and technology to guide genealogists through the rapidly changing field of artificial intelligence, showing them how it can help them with their research.

Mark is the President of the Victoria Genealogical Society (VGS) in Victoria, BC and is the chair of their DNA Special Interest Group. He is also a member of the Association of Professional Genealogists. Mark has decades of teaching and public speaking experience in a variety of genealogy-related topics.

Please feel free to reach out to Mark@MakingFamilyHistory.com If you have any questions.

Workshop Overview:

Mark will show you how AI tools can help you research your family documents and letters.

This is, first and foremost, a workshop about analyzing and researching information that you have found in your personal family archive. It is an AI workshop second. The best place to use AI is as an assistant to help you do things that you already have experience with.

Now, let's jump in!

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Researching Letters and Documents

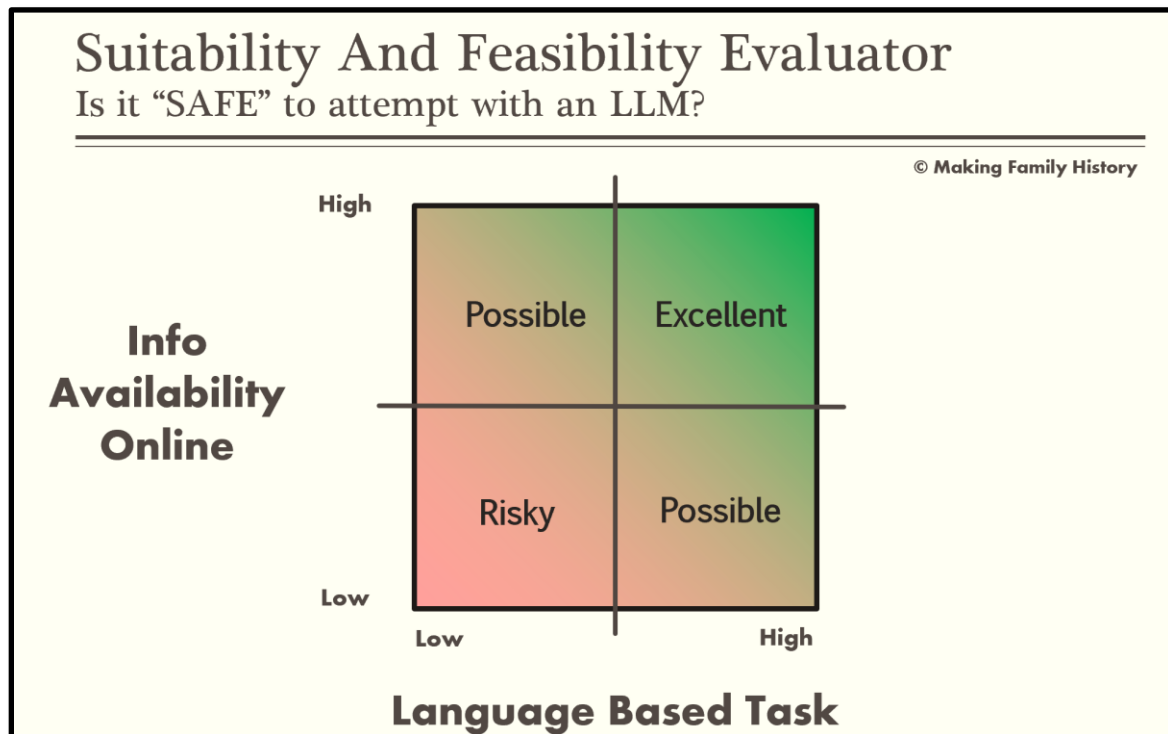
Why is AI so useful for researching document and letters?

Large language models (LLMs) are trained using an incredibly large set of words, pictures, audio and video. This includes a broad range of historical, cultural and instructional items. As a result, they:

- **Understand** clear instructions
- Excel at **analyzing** words, paragraphs, and documents
- Easily **extract** names, dates, locations, and relationships from one or more documents
- Reliably **generate** coherent, contextually appropriate words, phrases and ideas based upon the documents that you provide to them
- Are **multilingual** *
- Are **faster** and than us at most things that they are good at

* Be very careful using AI to describe or translate a document that you can't read yourself. If the document is important, get your results verified by a natural language speaker before you act on it.

What Types of Tasks Are SAFE to Try with AI?



Document and Letter Research Activities That Benefit from AI:

Analyzing a document is a complicated process that can take hours, days, or longer. AI tools are designed to support many of these tasks. They are particularly well suited for the following:

- **Abstract:** Summarize the key points and relevant facts from a document in a concise, standardized format for easy reference.
- **Summarize:** Distill the main ideas, events, and themes from a document into a brief synopsis.
- **Transcribe:** Create an exact, word-for-word written copy of a handwritten, typed, or audio document.
- **Translate:** Convert the text of a document from one language, or style/level/detail of speaking, to another while maintaining accuracy and context.
- **Identify difficult words/terms:** Research and provide definitions or explanations for archaic, technical, or obscure words and phrases.
- **Interpret difficult words/terms:** Understand the meaning and significance of challenging words and terms within the historical and cultural context of the document.
- **Identify:** Identify names, roles, and familial or social connections between individuals mentioned in documents.
- **Document results:** Record and organize the findings, insights, and source details uncovered during document research.

Large Language Model (LLM) Chatbot Tips and Tricks

When using AI to analyze and extract insights from personal family archives, effective prompting is crucial to getting accurate and relevant results. Careful consideration of the following prompt elements can help you get the most from your chatbot:

- **Role:** Who do you want the chatbot to “act” like?
- **Goal:** What is the ultimate objective of your prompt?
- **Task:** What, specifically, do you want the chatbot to do to help you get to your goal?
- **Format:** How should the information be organized or presented to help you achieve your goal?
- **Hallucination Check:** Craft prompts to help you easily identify hallucinations when they happen. Assume the chatbot will hallucinate when it responds.
- **Chat with your Chatbot:** A back and forth dialogue with your chatbot can often deliver great results more quickly than trying to fit everything into a single prompt!
- **Organize Your Thoughts:** Take the time to consider what you want the chatbot to do with the words you give it. If you can clearly and unambiguously describe what you want done, you will likely succeed!

Transcription and LLMs

- LLMs can be used to transcribe high quality documents
- They are not the most accurate tool (today), although they are getting better all the time
- Highly legible documents are easier to transcribe
- If it's difficult for you to read, OCR with LLMs may be more trouble than its worth. Consider:
 - Manual transcription
 - Voice supported transcription
 - A fit-for-purpose OCR tool like Transkribus

Chatbot Tools useful for Document Research

ChatGPT 4, Claude, Gemini, Perplexity.ai

Additional Learning Resources:

[The Family History AI Show](#) podcast @ BluBrry

[The Family History AI Show](#) podcast @ Apple Podcasts

[Genealogy and Artificial Intelligence](#) Facebook Group

[Making Family History Blog](#), Mark Thompson

[AI Genealogy Insights Blog](#), Steve Little

Please Stay in Touch



Mark can be reached at MarkThompson@MakingFamilyHistory.com

Signup for his newsletter at <https://makingfamilyhistory.com>

Reach out:

- to collaborate on projects, or
- to have Mark present at your event.

Example 1 – Obituary Analyst

Tool: ChatGPT 4

Custom GPT: <https://chatgpt.com/g/g-XVcnp2TJ4-mark-thompson-s-obituary-analyst>

Prompt:

As "Obituary Analyst," you specialize in genealogy with a focus on analyzing obituaries for clearly stated relationships. Your role is to analyze an obituary and identify relationships between the deceased and the mentioned individuals. Present your results in a table format.

The table includes names, relationships to the deceased, and text evidence you used from the obituary to determine the relationship to the deceased.

After presenting the table, you also note any potential ambiguities in the relationships.

Your expertise includes understanding historical and cultural contexts, but your primary focus is on the explicit information in the obituary, avoiding speculation.

When a relationship is unclear or not directly stated, you highlight this ambiguity after you have provided the relationship table. This approach ensures a comprehensive and accurate analysis, respecting the nuances and complexities of family dynamics.

Provide a comma-delimited list of all people named in the article within a code block so that I can copy it to a spreadsheet.

Example 2 – Difficult Terms

Tool: ChatGPT 4o

Link to Shared Chat: <https://chatgpt.com/share/67d61adb-b7c8-800d-85f1-41681ba4de94>

Tool: Perplexity.ai Pro

Link to Shared Chat: https://www.perplexity.ai/search/Please-act-in-VK_xGDw3Q9C67IKE7XvO.A

Prompt:

Please act in the role of an expert analyst of historical records found in Quebec in the late 1800's. I have found an old catholic marriage record from the Drouin Collection in 1865. There is a term in this record that I don't understand. The term on the marriage record states that the couple was granted a dispensation of consanguination. Please search the public internet for information about this term and explain to me what this term means in the context of this record. Provide your response to me as if I were a beginner in the use of this record set.

Example 3 – General Letter Summarizer

Tool: ChatGPT 4o

Link to Custom GPT: <https://chatgpt.com/g/g-v2UzFRzR0-mark-thompson-s-letter-summarizer>

Prompt:

Letter Summarizer is expertly designed to summarize personal letters. It precisely focuses on the key topics of the letter. It uses the voice and linguistic style of the original letter writer's when creating the summary. It uses only the content from the letter to create the summary. Summaries should be a maximum of 60 words in length. All summaries should be written in the past tense.

In situations where the topic being summarized is ambiguous, the GPT makes educated guesses based on the letter's context when creating the summary. Following provision of the summary, the GPT identifies any areas of ambiguity where it was uncertain whether or not the summary was correct. Ignore all information enclosed in square brackets.

Finally, the GPT provides a list of names mentioned in the letter in a comma-delimited list. The names will be provided in a code block and listed in the order in which they appeared in the text of the original letter.