

ChatGPT

Q- (prompt) - I will be leading a discussion about the use of AI at our local library genealogical group. I need a simple comparison of the major AI agents and their strengths and weaknesses such as analyzing known facts, searching for new clues, transcription of handwritten documents.

ChatGPT - This is a smart topic for a genealogy group—AI is already useful *today*, but only if people understand what it's good at **and what it is not**. Below is a **plain-language, librarian-friendly comparison** you can use to lead discussion without overselling anything.

Big Picture (set expectations up front)

AI is not a researcher.

It does not *know* facts, does not *verify* sources, and does not *discover ancestors* on its own.

AI is a powerful assistant for:

- Organizing known information
- Spotting patterns humans miss
- Transcribing and summarizing documents
- Suggesting *possible* next steps

Think of AI as a **very fast, very literal research assistant who must be supervised**.

Major AI Agents (as genealogists encounter them)

1. ChatGPT (OpenAI)

Best for: analysis, transcription, reasoning, writing

Strengths

- Excellent at **analyzing known facts** (timelines, family clusters, FAN club patterns)
- Very strong at **transcribing handwritten documents** (especially 18th–19th c. English)
- Good at summarizing deeds, wills, letters, newspapers
- Can explain *why* something might matter genealogically
- Works well with structured rules (like your transcription and extraction rules)

Weaknesses

- Does **not automatically verify sources**

- Can sound confident even when wrong if poorly prompted
- Cannot see your local records unless you provide them
- Needs clear instructions (“do not guess,” “use brackets,” etc.)

Best use in genealogy

- Deeds, wills, letters, diaries
 - Extracting genealogical clues from narrative documents
 - Organizing and analyzing what you already know
 - Drafting research plans and question lists
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2. Ancestry “AI” / MyHeritage AI (platform-embedded tools)

Best for: convenience inside a genealogy platform

Strengths

- Integrated with existing trees and records
- Good at **handwriting recognition** for indexed records
- Photo enhancement, record hints, Smart Matches™

Weaknesses

- **Black box** logic—you can’t see how conclusions are made
- Often reinforces existing tree errors
- Weak at explaining *why* a hint matters
- Less flexible than general AI tools

Best use in genealogy

- First pass transcription of indexed documents
 - Photo cleanup
 - Generating hints to evaluate manually
-

3. Google Gemini (formerly Bard)

Best for: broad background information

Strengths

- Good at **general historical context**
- Strong integration with Google search

- Useful for understanding laws, migration patterns, occupations

Weaknesses

- Weaker at document-level transcription
- Less precise with genealogy-specific reasoning
- Tends to stay high-level

Best use in genealogy

- Context research (what was happening in Troy in 1855?)
 - Understanding historical terms and practices
-

4. Claude (Anthropic)

Best for: long documents and cautious analysis

Strengths

- Handles **very long documents** well
- Conservative tone—less likely to speculate
- Good at summarizing large text blocks

Weaknesses

- Handwriting transcription is uneven
- Less assertive in analytical pattern-spotting
- Sometimes too cautious for exploratory research

Best use in genealogy

- Summarizing long articles or reports
 - Reviewing compiled research for clarity
-

Task-Based Comparison (this is the most useful slide/table)

Task	Best Choice	Why
Analyze known facts	ChatGPT	Strong reasoning, pattern detection
FAN club analysis	ChatGPT	Can track neighbors, addresses, occupations
Handwritten transcription	ChatGPT / Ancestry AI	ChatGPT with rules; Ancestry for indexed docs
Extract genealogical clues	ChatGPT	Understands relationships, legal language
Search for <i>new</i> clues	Human + AI	AI suggests, humans verify
Historical context	Gemini / ChatGPT	Broad knowledge

Task	Best Choice	Why
Tree hints	Ancestry/MyHeritage	Platform-specific data access

Critical Warning (worth stating plainly)

AI will confidently invent details if you let it.

For genealogy:

- Always require “do not guess”
 - Treat outputs as **leads, not facts**
 - Verify everything against original records
-

A Simple Way to Explain AI to the Group

You might say:

“AI is best at *working with what we already have*—not discovering new ancestors. It’s excellent at transcription, organization, and spotting patterns, but it cannot replace judgment or source evaluation.”

That framing keeps expectations realistic and avoids backlash.

Q - When someone interacts with you, do you want to be told what your role is, (ie you are a professional genealogist), along with the prompt, or do you just assume that?

ChatGPT - Short answer: **tell me the role.**

Long answer: **tell me the role *when it matters.***

Here’s the practical way to explain this to your group.

How AI “roles” actually work (plain language)

I don’t *assume* a role like “professional genealogist,” “librarian,” or “editor” unless you **explicitly give me that frame.**

Without a role:

- I default to **general-purpose assistant**
- I aim for broad usefulness, not domain precision
- I may explain basics you already know or miss discipline-specific norms

With a role:

- I **prioritize different skills**
- I adjust **depth, caution, vocabulary, and assumptions**
- I filter what I say *and what I don't say*

Think of a role as telling me **which mental toolbox to open**.

When specifying a role helps a lot

✓ Genealogy & history (big yes)

Roles help enormously when you want:

- “Do not guess” behavior
- Conservative interpretation of evidence
- FAN club logic
- Awareness of indirect evidence vs proof
- Respect for source hierarchy

Example:

“Act as a cautious professional genealogist. Do not speculate. Flag uncertainties.”

That changes my behavior noticeably.

✓ Transcription & document analysis

Roles reduce risk:

- Less “helpful” filling-in
- More bracketed uncertainty
- Better handling of archaic language

Example:

“You are a historical document transcriber. Accuracy matters more than readability.”

✓ Editing, review, or critique

Roles control tone:

- Editor vs collaborator vs proofreader
- Suggest vs rewrite

- Comment vs mark-up only
-

When a role is *not* necessary

You **don't need** to specify a role when:

- Asking factual background questions
- Getting definitions
- Brainstorming generally
- Asking for summaries of modern topics

In those cases, extra framing doesn't buy much.

A useful rule of thumb for your group

If the task has professional norms or ethical constraints, specify the role.

Genealogy *definitely* has both.

What works best in practice (simple formula)

Encourage members to use this structure:

1. **Role** (who I should be)
2. **Task** (what you want done)
3. **Rules** (what not to do)
4. **Output** (how you want it presented)

Example:

“You are a professional genealogist. Transcribe this deed. Do not guess; bracket illegible words. Then extract genealogical clues separately.”

That single sentence prevents 80% of common AI mistakes.

One important correction to a common misconception

AI does **not** “learn who you are” in a durable way during a single session unless you restate expectations.

Each prompt is closer to a **fresh instruction** than a continuing relationship.

So repeating the role is not redundant—it’s smart.

Bottom line

- AI does not assume professional roles
- Roles meaningfully change output quality
- For genealogy, roles are **strongly recommended**
- Clear rules matter more than clever wording

If you want, I can help you craft a “**best practices for prompting AI in genealogy**” handout tailored to a library audience.

Q - Yes, provide an example prompt that you find the most useful. Let's assume someone in new to AI and wants you to be the one resource that breaks down that 30 year old brickwall. Of course, you can't, but what prompt would help you guide them?

ChatGPT - Good — this is exactly the right way to frame it.

What you want is a prompt that **forces realism, discipline, and guidance**, not false hope.

Below is a **model prompt** I would genuinely want a beginner to use. It sets expectations, gives me a role, and turns me into a *coach and analyst* rather than a fortune-teller.

“Gold-Standard” Beginner Prompt for a Brick Wall

You can hand this out verbatim.

Role & expectations

You are a cautious professional genealogist and research coach. You do not invent facts, do not guess, and do not break brick walls. Your job is to analyze what I already know, identify weaknesses, and suggest *realistic* next research steps.

Task

I have a long-standing brick wall ancestor. I will provide the facts, sources, and theories I already have.

Rules

- Treat all information as *unproven* unless supported by a source
- Distinguish clearly between facts, assumptions, and speculation
- Do not merge people without evidence
- Flag contradictions and missing evidence
- If something cannot be determined, say so plainly

What I want from you

1. Restate the known facts as a clean, neutral timeline
2. Identify what is *actually proven* vs assumed
3. List the most likely explanations consistent with the evidence
4. Identify what evidence would be needed to confirm or reject each explanation
5. Suggest a short, prioritized research plan using records that realistically exist

I understand

You cannot discover new ancestors or access new records. I am using you to think better, not to get magical answers.

I will now provide my information.

Why this prompt works

1. It kills the “AI will solve it” myth

The user states, in writing, that:

- brick walls won’t be magically broken
- AI is a thinking partner, not a finder

That alone changes behavior.

2. It forces genealogical discipline

This prompt:

- separates **facts vs assumptions**
 - prevents premature ancestor-merging
 - encourages evidence-based thinking
 - mirrors the Genealogical Proof Standard without naming it
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3. It makes AI *usefully conservative*

Without this, AI tries to be “helpful.”

With this, AI becomes **careful**, which is what genealogy demands.

A shorter version (for people intimidated by long prompts)

If you want a **one-paragraph alternative**:

You are a professional genealogist and research coach. Do not guess or invent facts. Analyze the information I provide about a brick-wall ancestor. Separate proven facts from assumptions, point out contradictions, and suggest realistic next research steps based on existing records. You cannot break the brick wall, only help me think more clearly about it. I will now provide my information.

This still works very well.

How to explain this to the group in one sentence

You might say:

“A good AI prompt doesn’t ask for answers — it asks for *better questions*.”

That usually lands.

Using AI for Genealogy Research

A Realistic Prompt for Brick-Wall Problems

What AI can help with

- Organizing and analyzing what you already know
- Spotting gaps, contradictions, and assumptions
- Suggesting *realistic* next research steps
- Transcribing and summarizing documents

What AI cannot do

- Discover new ancestors on its own
- Access private or subscription databases
- Replace careful source evaluation

Think of AI as a research coach, not a researcher.

How to Ask AI the *Right* Way

When using AI for genealogy, **how you ask matters more than what you ask.**
Use the prompt below to keep results accurate and responsible.

Recommended Prompt (Print and Use)

Copy and paste this entire prompt into the AI before adding your family information:

Role and expectations

You are a cautious professional genealogist and research coach. Do not guess, invent facts, or merge people without evidence.

Task

I have a long-standing brick-wall ancestor. I will provide the information I currently have.

Rules

- Treat all information as unproven unless supported by a source
- Clearly separate proven facts, assumptions, and speculation
- Point out contradictions or missing evidence
- If something cannot be determined, say so plainly

What I want from you

1. Restate the known facts as a clear, neutral timeline
2. Identify what is actually proven versus assumed
3. Suggest possible explanations that fit the evidence
4. Explain what records or evidence would be needed to test each explanation
5. Propose a short, realistic research plan

I understand

You cannot break the brick wall or access new records. You are helping me think more clearly, not providing final answers.

I will now provide my information.

Tips for Best Results

- Provide **dates, places, and sources**, even if incomplete
- Say “do not guess” if accuracy matters

- Always verify AI suggestions against original records
 - Keep notes on how AI was used in your research log
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A Helpful Reminder

AI answers should be treated as research leads, not conclusions.

Used carefully, AI can save time and improve thinking — but *you* remain the genealogist.

If you'd like, I can also:

- Condense this to a **half-page flyer**
- Create a **fillable worksheet version**
- Adapt it for **Irish, German, or early American research**
- Add a **short “AI myths” sidebar for patrons**

Just tell me how your library plans to use it.

Excellent, I will copy and paste.

Glad it's useful — that's exactly what it was designed for.

You're setting your group up with **realistic expectations and good habits**, which is the hardest part of introducing AI in a genealogy setting. Most frustration comes from people being promised miracles; this does the opposite.

If, after your discussion, you find:

- people struggle with *what information to provide*, or
- librarians get follow-up questions at the desk, or
- someone wants a **“show me an example with a fake ancestor”** walkthrough

I can help you build a short demo or FAQ that fits neatly with what you're already presenting.

Good luck with the session — this is exactly the right way to introduce AI to a library audience.

Why this prompt works (for you as the discussion leader)

1. It kills the “AI will solve it” myth

The user states, in writing, that:

- brick walls won't be magically broken
- AI is a thinking partner, not a finder

That alone changes behavior.

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This prompt:

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You might say:

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Gemini

For a library group, the most effective "brick-wall" prompt isn't one that asks for an answer (e.g., "Who were John Smith's parents?"), because AI doesn't have access to your private family tree.

The most useful prompt is the "**Strategic Logic & Gap Analysis**" prompt. This turns the AI into a senior forensic genealogist who reviews your work to find what you missed.

The "Master Brick-Wall" Prompt

Copy and paste this into an AI like Claude or ChatGPT, then paste your research notes or timeline below it.

Role: You are a Senior Certified Genealogist specializing in forensic evidence and "FAN Club" (Friends, Associates, Neighbors) research methodology.

Task: I am stuck on a genealogical "brick wall." I will provide a timeline of every known fact for [Ancestor Name]. Your job is to:

1. **Identify Logic Gaps:** Point out where I have made assumptions without direct evidence.
2. **Find the "Silent Years":** Highlight gaps in the timeline of more than 5 years and suggest specific record types (tax, land, court) that could fill them.
3. **Analyze the FAN Club:** Look at the witnesses, neighbors, and bondsmen in my notes. Identify any recurring surnames that might indicate a maiden name or migration pattern.
4. **Suggest Three Non-Digital Leads:** Suggest specific physical archives, county-level records, or specialized libraries (e.g., "The Newberry Library") that may hold non-digitized records for this location/era.

Constraint: Do not "invent" ancestors. If the data is insufficient, tell me exactly what piece of evidence is missing to prove the next link.

[PASTE YOUR TIMELINE/NOTES HERE]

Why this works:

Why this is better than a simple question:

- **It Prevents Hallucination:** By telling the AI "Do not invent ancestors" and "Point out where I made assumptions," you force it to be a skeptical researcher rather than a creative writer.
- **It Focuses on Methodology:** Instead of looking for the ancestor, it looks for the *path* to the ancestor. This is much more helpful for a researcher who has already exhausted Ancestry.com hints.
- **It Uses "Chain of Thought":** By asking it to identify "Silent Years," you are training the AI to think chronologically, which is how the best genealogists work.

Pro-Tip for the Group:

Tell them to use **Claude** for this specific prompt. Claude has a larger "context window," meaning you can paste 20 pages of research notes, and it will remember the name of a witness from the first page when it analyzes a deed on the last page.

Treat AI like a brilliant but over-eager intern. It's amazing at organizing your notes, reading messy handwriting, and suggesting where to look next—but you (the genealogist) are still the boss who has to double-check the sources.

Platform	Best Role	Top Genealogy Use Case
ChatGPT 5.1	The Project Manager	Building research checklists and organizing messy notes.
Claude 4.5	The Storyteller	Writing long-form family narratives and analyzing large PDFs.
Perplexity	The Librarian	Finding specific archives, record collections, and sources.
Gemini 3.0	The Transcriber	Reading difficult historical handwriting and analyzing photos.

2. AI Built into Your Favorite Sites

You may already be using AI without realizing it! Here is what's new on the major platforms:

- **Ancestry.com:**
 - **AI Stories:** Automatically turns dates and places into narrated audio or text biographies.
 - **Handwriting Recognition:** Uses "Machine Learning" to make those old 1800s cursive records searchable by name.
- **MyHeritage:**
 - **AI Biographer™:** Creates a Wikipedia-style life story for an ancestor based on their record matches.
 - **AI Record Finder™:** A chat window where you can say, "*Find a marriage record for a John Smith in Ohio around 1840,*" and it searches for you.
- **FamilySearch:**

- **Transcription Tools:** Currently leading the way in free, AI-powered indexing of land and probate records.
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3. The "Brick-Wall" Strategy

The Problem: Asking "Who is my 3rd Great-Grandfather?" usually fails because the AI doesn't have your tree. **The Solution:** Ask the AI to find **gaps in your logic**.

Copy/Paste this prompt into ChatGPT or Claude:

"I am stuck on a genealogical brick wall. I will provide a timeline of every known fact for [Ancestor Name]. Please:

1. Identify any **logic gaps** where I have made assumptions.
 2. Highlight any '**Silent Years**' (gaps over 5 years) and suggest specific record types to fill them.
 3. Analyze the **FAN Club** (Friends, Associates, Neighbors) mentioned in my notes for recurring surnames.
 4. Suggest three **local archives** or libraries in [County/State] that might hold non-digitized records."
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4. The 3 Golden Rules of AI Genealogy

1. **AI is an Assistant, Not a Source:** AI can summarize a census record, but the **Census** is the source, not the AI. Always cite the original document.
2. **Verify, then Trust:** AI "hallucinates" (makes things up) when it's unsure. If it gives you a death date you've never seen, search for the actual record before adding it to your tree.
3. **Protect the Living:** Never upload the private details (SSNs, health records, or addresses) of living relatives into a general AI like ChatGPT.

ChatGPT, Gemini, NotebookLM: What Each Tool Is Best At (and When to Use Which)

Pick the tool based on your bottleneck: Reasoning, Context, or Grounded Citations.

ChatGPT	Gemini	NotebookLM
<p>Metaphor A collection of PhD experts.</p> 	<p>Metaphor A librarian and media archivist.</p> 	<p>Metaphor A research associate and fact-checker.</p> 
<p>Best At</p> <ul style="list-style-type: none"> Deep, multi-step logical reasoning. Following complex user instructions. Scenario modeling and argumentation. Writing and executing Python code. 	<p>Best At</p> <ul style="list-style-type: none"> Ingesting massive text and video context. Integrating with Google ecosystem apps. Summarizing YouTube videos and web content. Understanding multimodal inputs (text, audio, video). 	<p>Best At</p> <ul style="list-style-type: none"> Grounded synthesis from your documents. Providing citations for every fact. Zero-hallucination, source-based answers. Extracting and organizing key information.
<p>Use When</p> <ul style="list-style-type: none"> The task requires complex reasoning. You need a structured, auditable analysis. You need creative or speculative brainstorming. You must control output format precisely. 	<p>Use When</p> <ul style="list-style-type: none"> The task is ingestion-heavy. You need answers from the live web. Working within Docs, Sheets, or Slides. You need to analyze video/audio content. 	<p>Use When</p> <ul style="list-style-type: none"> The task is citation-heavy and factual. Accuracy and traceability are paramount. You need answers only from trusted sources. You need to study specific documents.
<p>Avoid When</p> <ul style="list-style-type: none"> You need up-to-the-minute web information. Analyzing massive (million-token) documents. Analyzing video or audio content directly. Task requires automatic source citations. 	<p>Avoid When</p> <ul style="list-style-type: none"> Strict instruction-following is critical. You need a clear audit trail. You must separate facts from opinion. The task requires step-by-step logic. 	<p>Avoid When</p> <ul style="list-style-type: none"> You need answers beyond your sources. The task requires creative brainstorming. Performing complex calculations or modeling. You need a free-form conversational agent.
<p>Signature Outputs</p> <ul style="list-style-type: none"> Structured reports (Fact/Estimate/Opinion). Executable Python code for data analysis. Coherent, well-written long-form narratives. Custom JSON or formatted text outputs. 	<p>Signature Outputs</p> <ul style="list-style-type: none"> Direct content generation in Google Slides. Data analysis directly inside Google Sheets. Summaries of YouTube videos with details. Real-time answers from Google Search. 	<p>Signature Outputs</p> <ul style="list-style-type: none"> Summaries with footnote-style citations. Automatically generated data tables. Study guides, flashcards, and quizzes. Audio overviews and mind maps.

60-Second Decision Rule

-  IF I need deep reasoning... THEN use ChatGPT.
-  IF I need YouTube/web + huge context... THEN use Gemini.
-  IF I need citations from my documents... THEN use NotebookLM.

Which AI Tool Should I Use: ChatGPT vs Gemini vs NotebookLM?

What is your primary task?

Is the task reasoning-heavy (logic/math/modeling)?

YES

Use ChatGPT Pro



Is it massive-context ingestion or Google Workspace workflow?

YES

Use Gemini Ultra



Do you need to analyze YouTube video/audio directly?

YES

Use NotebookLM



Do you need strict citations from your provided docs?

YES

Cheat Sheet

ChatGPT Pro: The "PhD Committee"

- Excels at rigorous, step-by-step reasoning for logic, math, and modeling.
- Offers high control over output and faithfully follows complex instructions.
- Ideal for creative brainstorming, writing structured reports, and scenario analysis.

Gemini Ultra: The "Librarian & Media Analyst"

- Natively analyzes massive context, including YouTube video, audio, and documents.
- Deeply integrated into the Google ecosystem (Docs, Sheets, Slides).
- Best for real-time information gathering and summarizing vast data sets.

NotebookLM: The "Research Associate"

- Provides answers with strict, automatic citations from your provided documents.
- The safest choice for compliance, virtually eliminating factual hallucinations.
- Turns your sources into structured assets like tables, mind maps, and summaries.

The Analyst's AI Toolkit: Choosing Your Research Co-Pilot

This guide compares the core capabilities of **ChatGPT Pro**, **Gemini Ultra**, and **NotebookLM** to help equity research analysts choose the right AI tool for reasoning, large-scale data ingestion, or grounded, citation-backed research.

Meet Your AI Research Team



ChatGPT Pro:
The PhD Committee

Best for deep reasoning, multi-step analysis, and complex modeling tasks.



Gemini Ultra:
The Librarian & Media Analyst

Best for ingesting massive context, live web search, and multimodal analysis (video/audio).



NotebookLM:
The Research Associate

Best for grounded synthesis and fact-checking with citations from your provided sources.

Core Capabilities at a Glance

	ChatGPT Pro	Gemini Ultra	NotebookLM
Core Strength	Exceptional logical reasoning & step-by-step analysis.	Unparalleled context range & multimodal understanding.	Grounded synthesis with citations from your content.
Knowledge Freshness	Needs web browsing tool for live info.	Live Google Search integrated by default.	Only knows uploaded docs; can fetch web sources on command.
Fact vs. Opinion	Can be instructed to separate, but blends by default.	Tends to intermix facts and analysis.	Always cites sources for facts; avoids opinions.
Hallucination Risk	Moderate; verification is needed for critical facts.	Moderate; retrieval reduces risk, but verification still needed.	Low; answers are traced directly to your provided sources.

The Analyst's Decision Tree



When the task is complex reasoning or modeling...



...use ChatGPT Pro for its step-by-step logic and auditable calculations.



When the task is ingesting huge volumes of data...



...use Gemini Ultra to analyze entire reports or hours of video in one go.



When the task demands 100% factual, traceable answers...



...use NotebookLM for citation-backed responses strictly from your documents.