

## Sources and Citations Made Simple, Standard, and Powerful

By Geoff Rasmussen

Geoff@LegacyFamilyTree.com

Genealogy without documentation is mythology! This phrase suggests that sound genealogical research requires us to record where we found the information we enter into our genealogy computer program. The main purposes of citing our sources are 1) to enable us or someone else to relocate the same document in the future, and 2) to show a summary of the evidence we used to come to a conclusion. If we keep these two purposes in mind, citing our sources should never become frustrating.

### How to write our citations

After a couple of years of not citing my sources, I learned that anything was better than nothing. Using this principle, the following is perfectly fine for a citation: "Aunt Polly's personal memory". If you recorded this as a citation, at least *you* would know where the information came from. It will not be as helpful to future researchers who do not know who Aunt Polly is. But it is a start.

A little better might be:

Aunt Polly's personal memory as recorded April 1, 1970.

And even better:

Polly Jones (Woodstock, Connecticut), interview by Frederick Smith III, 1 Apr 1970; transcript privately held by Geoffrey Rasmussen, [ADDRESS FOR PRIVATE USE,] Surprise, AZ, 2011.

Remember, if we or someone else can locate the information/source again, then you have included enough information in the citation. However, if you are publishing a report or article, or just simply want to follow the industry guidelines in correctly writing a citation, you can follow the guidelines as published in many books, websites and software programs.

- *The Chicago Manual of Style* - <http://www.chicagomanualofstyle.org>
- *Evidence Explained: Citing History Sources from Artifacts to Cyberspace* by Elizabeth Shown Mills
- Zotero - <http://www.zotero.org>
- EndNote – <http://www.endnote.com>
- [Your favorite genealogy management software](#)

Genealogists today will typically record their citations in their genealogy management software. For example, if you locate a birth date for an ancestor from a published book, after recording the new date for that person, you would then add its citation. Once the citation has been added, it can be optionally included when you use your software's book reports, family group records, etc.

If you are just using a word processor alone to write your ancestor's story, and you wish to include quality footnotes or endnotes, you can still use any of the above resources. Some of the software mentioned above include "plug-ins" for popular word processors (like Microsoft Word) to assist you. You could even copy/paste the citations from websites and include them in your document.

### **Genealogy Management Software**

Many popular genealogy management software programs have recently developed citation systems to follow the industry standards for citation style/elements. Some developed templates based on Elizabeth Mills' *Evidence Explained* guidelines. Below are guidelines for understanding and using the SourceWriter system in Legacy Family Tree.

Prior to version 7, Legacy's citation methods were rudimentary and straight forward (provided space to record the author, title, and publication information) but didn't offer the expert help needed in order to automatically produce correct citations (periods, commas, italics, etc. all in the right places without you having to know how to do it...). Actually, in version 7 or higher, you can use either of the citation methods, the new or the old. We will call the new system "SourceWriter" and the previous system the "Basic System." If you always want to use the old system, go to Options > Customize > Sources and select Basic System. To use the new SourceWriter system, make sure the option is set to SourceWriter System.

#### **Here is the basic outline of adding a source:**

- add the new information to the person
- click on the source icon
- if this source is one you have not used previously, click on **Add a New Source**, fill in the fields, click **Save**, fill in the detail, and click **Save**.
- if this source is one you have previously entered for someone else, click on **Cite a Master Source**, select the source, fill in the detail, and click **Save**.

That's it!

#### **Adding a Source Using SourceWriter**

There are several ways to reach the Add a New Master Source screen:

- From the Assigned Sources List from an Individual, Marriage, or To-Do screen, click "Add a New Source".
- From View > Master Lists > Source, click the Add button.

#### **STEP 1 - Choosing a Source Template**

The first step is to select the proper source template that matches the source you are documenting. A source template is made up of all the potential pieces of information that you should record about the source. These include both the fields for the master source and the fields for the details of the citation. Some sources require only a few bits of information and others require many.

There are two different ways to find the source template that you want to use. The first is by entering keywords to display the Source Template Index showing you all the templates that match your query. From there, you select the template that matches the source you are entering. The second method is to select the template by first selecting the general type of source and then choosing subcategories that refine the choice down further and further until you have the desired template that matches the source. These two methods are described in detail below.

**a) Selecting by Keyword(s)**

Begin by entering one or more keywords into the field and then click the Search button. This then displays the Source Template Index showing you all the templates that match your keywords. For example, if you entered book authored, the Source Template Index would show you a list of about 100 templates. These would be grouped into four sections; Audio book, Book, CD, and DVD. It would be fairly straightforward to then select the actual book type that you are dealing with. If you knew that you were citing a source from a basic printed book, you could have entered the keywords, book authored basic, the resulting index list would have only contained 12 templates. As you use the Source Index more and more, you will get better and better at selecting the desired keywords that will make the template selection go more quickly.

Filtering the Source Index List - There is an option at the bottom of the Source Template Index called, Filter the list when searching. Selecting this option cause the list to only show the templates that match all of your keywords. With the option unchecked, the list will include the entire index with the first template that matches your keywords highlighted. You can then use F3 to jump from matching template to matching template down through the list. (Shift-F3 jumps backwards up the list.)

Changing the Keywords

You can add or remove keywords from the search field at the top and then click the Search button to create a new list of matches.

Choosing the Template from the List

When you find the correct template, click on it to highlight it and then click the Go button. (Or you can simply double-click the template line.) You are then taken to the screen where you actually enter your source information into the template fields. See Filling in the Source Template below for more information.

**b) Selecting a Template by Type**

Selecting a template by type is a multi-step process. Begin by selecting the desired type from the list box on the left. When you have clicked on the type you want to select, you may be prompted for subcategory types to narrow the choice for the final template you should use. Some types require up to four subcategories, others don't require any.

As soon as you have answered the last prompt in the series, the **Go to Step 2** button is enabled so that you can click it to continue on to the actual source template. See *Filling in the Source Template* below for more information.

### **Tip: Bookmarks**

After you have cited many sources in your family file you may find that you are using one or more of the same templates on a regular basis. For example many people cite a basic format authored book many times. A certain type of cemetery record or federal census found online may also be a popular choice. When you find a particular template that you are using over and over again, you can save a bookmark for it so that you can easily and quickly select it again in the future.

To save a bookmark, first make all your type and subcategory selections until the **Go to Step 2 button** is enabled. But before you click it, click on the Create a bookmark for the selected source link at the bottom of the screen. Legacy saves the template in the Bookmark List:

To select and use one of your bookmarks, click on the desired bookmark to highlight it and then click the button to the right of the Bookmark List to continue on to the actual source template. See *Filling in the Source Template* below for more information.

To delete a bookmark, highlight it and then click the Delete Bookmark link.

### **Tip: Evidence Explained Section numbers**

Suppose you want to cite a deed as formatted in *Evidence Explained* section 10.5. Instead of navigating through the “Choose the type of source from this list” section to select the desired source type, just type the section number in the “What kind of source do you want to cite” field in Step 1 and click Search. The resulting list will display the correct template that matches section 10.5.

## **STEP 2 - Filling in the Source Template**

The second step to adding a new source using SourceWriter is to fill in the actual fields of the template for the master source.

The name of the source template that you have selected is shown in the header. In this example it is: Census records > United States > Federal census records > 1920 population schedule > Online images. It is a long name but it precisely identifies the template type and subcategories. Many names are shorter, some are longer.

Below the header is the actual template. The first tab, Source Info, contains the fields that you will be filling in. The other four tabs, Text, Repository, Multimedia, and Overrides are included so that you can add additional information about the source as well as pictures and other items of interest.

To the right of the input section is the Output Preview. As you enter the information about the source, it is instantly processed and displayed in three different formats so that you can see how it will look when included on a report or book. The Footnote/Endnote Citation output is used for the first occurrence of a footnote (at the bottom of each page where a source is cited) or endnote (at the end of each generation, chapter, or book) on a report. The Subsequent Citation is used in the same places as the footnotes and endnotes but uses a condensed format that doesn't require as much room. The Bibliography is printed at the end of a report and is a summary of all the master sources cited in the report and is shown in alphabetical order.

### **Saving the Source**

To save the source, click Save. If you are adding a citation, you will be taken next to the Detail screen where you can enter addition information pertaining to the particular citation of the source that you are making. This is usually a page number, item number, etc.

### **STEP 3 - Recording the Details**

The third step in adding a source citation is to fill in the detail information. A particular master source of information may be an unlimited number of times within a Family File. You might have found a book or bible that contains hundreds of family members. The location of each piece of information for each individual should be recorded. Rather than record the entire source description hundreds (or thousands) of times, taking up huge amounts of storage space, it is much more efficient to enter a general source description once, point to it in the master source list and record just the unique information for each piece's place within that source.

The Source Detail window is where you enter information about a source that indicates where in a specific source the cited information was found. Most source templates contain additional detail fields, that when filled in, are incorporated into the final output of the footnotes or endnotes.

Detail Fields - Enter the requested information if you know it. These is usually page numbers, volume numbers, item numbers of a microfilm rolls, line numbers, etc.

To the right of the input section is the Output Preview. As you enter the information about the source detail, it is instantly processed and displayed in three different formats so that you can see how it will look when included on a report or book. The Footnote/Endnote Citation output is used for the first occurrence of a footnote (at the bottom of each page where a source is cited) or endnote (at the end of each generation, chapter, or book) on a report. The Subsequent Citation is used in the same places as the footnotes and endnotes but uses a condensed format that doesn't require as much room. The Bibliography is printed at the end of a report and is a summary of all the master sources cited in the report and is shown in alphabetical order.

## Master Source vs. Source Detail

Let's say that your ancestors are listed in a book – The Brown Family of America. Information about John Brown is on page 34. Information about Henry Brown is on page 39. In this case, The Brown Family of America, the book, is the master source. The details about what was found on page 34 for John Brown belong in the Source Detail. Details about Henry belong in the Source Detail for Henry. In this case, information about the page numbers should not be included in the Master Source. If a page number were included in the Master Source, then it is assumed that the page number applies to everyone else in the book.

For example, if you created a new Master Source, with this book as the title, and you included the page number in the Master Source, the next time you cited this same Master Source for someone else, you would also get the page number information.

Before continuing with sourcing, you should understand this concept of master source vs. the source detail. More information is available at <http://www.legacyfamilytree.com/Tips.asp>, in the user's guide, or in *Legacy's Ultimate Guide to Sources* CD.

## Source Clipboard

If you are using the same book over and over and over for multiple people, normally you would click on the Cite a Master Source button after clicking on the person's source icon. We cite the source because you have already entered it once, and do not need to enter the same information about the same book more than once. However, the detail probably changes from family to family. In other words, you are still citing the same book, but the details (page number, etc.) change from person to person.

You could continue using the Cite a Master Source button, and entering each person's details, or you could save time by using the Source Clipboard. The purpose of the clipboard is to make it easier and faster to cite the same source repeatedly.

To use the Source Clipboard, follow these steps:

1. First, tell Legacy which source you want to use repeatedly by clicking on the triangle button.
2. Click on the Clear Clipboard button to start fresh.
3. Click on the link for Step 1: "Click here to select or change the master source to cite."
4. If you are using a source that you have already entered, click on the desired source, and click on the Select button.

The screenshot shows a software interface for entering personal details. On the left, there are four buttons: a triangle pointing up, a minus sign, a hamburger menu, and a square. A red double-headed vertical arrow is positioned between these buttons and the main form. The form contains the following fields:

Given	Asa Clark
Surname	Brown
Title Pre.	
Born	11 Oct 1792
Chr	
Died	8 Mar 1866
Buried	Mar 1866

Below the form is a section titled "Events/Facts" with a table:

Age	Event/Fact	Date
	Discovered Birth	

5. If this is a new source that you have not yet created, click on the Add button, and follow the steps to add a new master source. Click Select.
6. Click on the Prompt for Detail button. Enter any source detail text and comments, and click OK.

The Source Clipboard is now ready to be used. Now, add the new information that you found from the source, then apply the Source Clipboard:

1. To “paste/apply” the source, make sure that the cursor is first in the field to be sourced, then click on the single bar (the 2nd button down in the clipboard). The details appear. Modify them as necessary, and click Save.

Done! The source, with its details, are now linked to the new data. Verify it by clicking on the source icon.

Please review both *Legacy's Ultimate Guide to Sources* and *Mastering Events and Chronologies* for a more detailed discussion of using the clipboard. Once you understand these concepts, sourcing becomes fun.

### **Organizing Sources**

The following question was recently asked in the online Legacy User Group:

*I want to use a Master Source that I've already created, but I can't find it unless I read through all 1300+ sources. Is there any way I can search the Master Source [List] using a keyword?*

This can be quite simple to do if you understand the difference between the Source List Name and the Title. These two fields are part of the master source.

Whatever is entered in the Source List Name will be shown in the Master Source List. The Master Source List is sorted alphabetically by this Source List Name. Therefore, some Legacy users will enter text at the beginning of the Source List Name to efficiently sort their list. Examples:

Census - 1850 - Pennsylvania

Census - 1860 - Pennsylvania

Census - 1870 - Pennsylvania

These census "phrases" can be added to the Source List Name, preceding the official name of the source. Now, in your Master Source List, all census records are grouped together, thus making it very easy to locate the source.

Another example:

Pennsylvania - 1850 - Census

Pennsylvania - 1860 - Census

Pennsylvania - 1870 - Census

Using this method, all Pennsylvania sources are grouped together. Within this locality, the sources are sorted by year, then by record group.

Both methods help to arrange the master source list to help you locate them quicker, and it encourages consistency in data entry. It's easy to forget how you last typed in a census record. You may have typed the same record in various formats:

1850 Pennsylvania Census

Pennsylvania 1850 Census

Census - 1850 Pennsylvania

Utilize the sorting capabilities of the Source List Name and be consistent in your data entry.

Finally, the Title field of the master source is the official title of the source. This is the source that will print in your citations. So, utilize the Source List Name to help sort your list, but use the Title field for the official title.

### **Converting existing basic-style sources to SourceWriter formatted sources**

First of all, I personally am NOT going back through ALL of my sources to convert them to the SourceWriter format. With tens of thousands of citations, I would never get back to research if I solely concentrated on this. Rather, when I'm adding new sources, I always use the SourceWriter. And when I'm currently researching a family that has Basic Style citations, I work to convert those citations. A citation consists of both the master source and the source detail. Here is my process for now....

- 1) Open the Assigned Sources list for an individual by clicking on the Sources icon. Here I can see which existing citations are Basic Style and which are SourceWriter style. The SourceWriter style citations have a small black bullet at the beginning in the Source List Name column.
- 2) When I locate a Basic Style source in this list, I click on it so it is highlighted. Then I copy/paste the entire Footnote/Endnote Citation from the Output tab into a Word Processor. I do the same for all of the text on the Text/Comments tab. I also make note of the Repository and any Pictures. With this text pasted into my Word Processor, I have everything I need to create the new SourceWriter source.
- 3) Using the Source Clipboard, I create the SourceWriter version of this source, entering all of the pieces into the correct fields, and pasting the text/comments/etc. from my word processor. If you're not comfortable with the Source Clipboard, I strongly suggest that you become comfortable with it. It will change your life....The Preview video of the Sources training CD at [http://www.legacyfamilytree.net/videos/previews/sources/sources\\_preview.html](http://www.legacyfamilytree.net/videos/previews/sources/sources_preview.html) teaches how

to use the Source Clipboard.

- 4) Once the Source Clipboard is set up, using the clipboard's single blue bar button, I locate and click on each Basic Style source in the Assigned Sources list, and paste the source from the clipboard into the appropriate event.
- 5) Each event will now have both the Basic Style source and the SourceWriter style source. Simply click on the Basic Style source, and click on the Remove button. Do this until each Basic Style source is gone, and is replaced with the SourceWriter version.

Repeat steps 4 and 5 for each person who shares the IDENTICAL Basic Style source (master source and citation).

### Printing citations

Including citations in a report, such as a Family Group Record, Descendant Book, or others, is optional. Turning on this option is found in the report's Report Options. Click on the Sources tab and be sure that "Print source citations" is checked.

The screenshot shows the 'Report Options' dialog box with the 'Sources' tab selected. The 'Print source citations' checkbox is checked. Under this option, 'As endnotes after each generation' is selected with a radio button. Other options include 'As footnotes', 'Start on new page', and 'As endnotes at the end of the book'. There is also a checkbox for 'If an event has multiple citations, combine them into one paragraph' which is checked, and 'Print Bibliography' which is unchecked. A 'Citation Paragraph Style' section has 'Indent first line (industry standard)' selected. On the right side of the dialog, there are buttons for 'Close', 'Cancel', 'Help', 'Privacy Options...', 'Page Setup, Headers, Footers...', and 'Report Fonts...'. A 'Set Source Picture Options...' button is also visible in the center of the dialog.

The choices in the upper left are most important. Here you decide whether to print footnotes, endnotes after each generation, or endnotes at the end of the book. Preview the report using different the options to see which method you prefer. Choosing “If an event has multiple citations, combine them into one paragraph” follows the technically proper standards of using citations in a report, and makes the report’s appearance more clean, but it can also lengthen the amount of space you want to allot for citations. Preview the report with and without this option selected to see the difference.

### More SourceWriter Tips

A good friend emailed me the other day asking for my advice on which SourceWriter template he should use for a collection of obituaries and death records he was using. He mentioned that Athens County, Ohio has published all of their obituaries from 1900 until 2008.

Looking through the SourceWriter's list of templates, my friend did not see an entry for an obituary. That's when he emailed me.

**Step 1. Add a New Master Source.**  
*using SourceWriter*

Cancel  
Help

What kind of source do you want to cite?:

Search

OR choose the type of source from this list:

- Message boards/forums
- Military records
- Native American records
- Naturalization records
- Newspapers
- Orphanage records
- Passport records
- Pedigree chart
- Periodicals

Go to Step 2

OR select one of your bookmarked source types:

Go to Step 2

[Create a bookmark for the selected source.](#)      [Delete Bookmark](#)

He was right, there is not an Obituary entry in the list of templates, although the Newspapers template would cover this. However, one word in his email to me stood out - *published*. I asked him about this, and he said that the obituaries were published in a series of books.

Problem solved. The correct SourceWriter template to use in this case is a book.

Let's say that a book has a listing of marriage records for a city. In the book, you find an entry of an ancestor's marriage date. Which SourceWriter template should you use? Marriage Record? Artifacts? Book?

The answer is pretty simple if you know what you are "holding in your hand". At a recent genealogy conference, Elizabeth Shown Mills, author of Evidence Explained, (book upon which the SourceWriter templates were constructed) taught that for us to understand what kind of citation/template to use, we should first look at the source we're holding in our hand. Are we holding a marriage record or an obituary in our hand? Or are we holding a book that talks about a marriage record or an obituary? If it's an actual marriage record, then cite this source using the template for a marriage record. If it's a book, then use the book template.

A similar concept would apply for citing a digitized document that you find on a website. Let's say you found an image of a marriage record online. The rule of thumb here is to cite this as a marriage record. After selecting Marriage Records in the SourceWriter's list, and answering the first few questions, select Online Images as the medium.

Add a New Master Source

## Step 1. Add a New Master Source.

*using SourceWriter*

What kind of source do you want to cite?:

OR choose the type of source from this list:

- Letters
- Lineage-Society materials
- Magazines
- Mailing List
- Maps
- Marriage records
- Medical records
- Membership organization records
- Message boards/forums

**1) Select the type of marriage record:**

**2) Select the type of marriage record:**

**3) Select the country:**

**4) Select the jurisdiction:**

**5) Select the medium:**

Click here to select

Basic format

Microfilm/fiche

Microfilm/fiche (filmed by Family History Library)

Online database

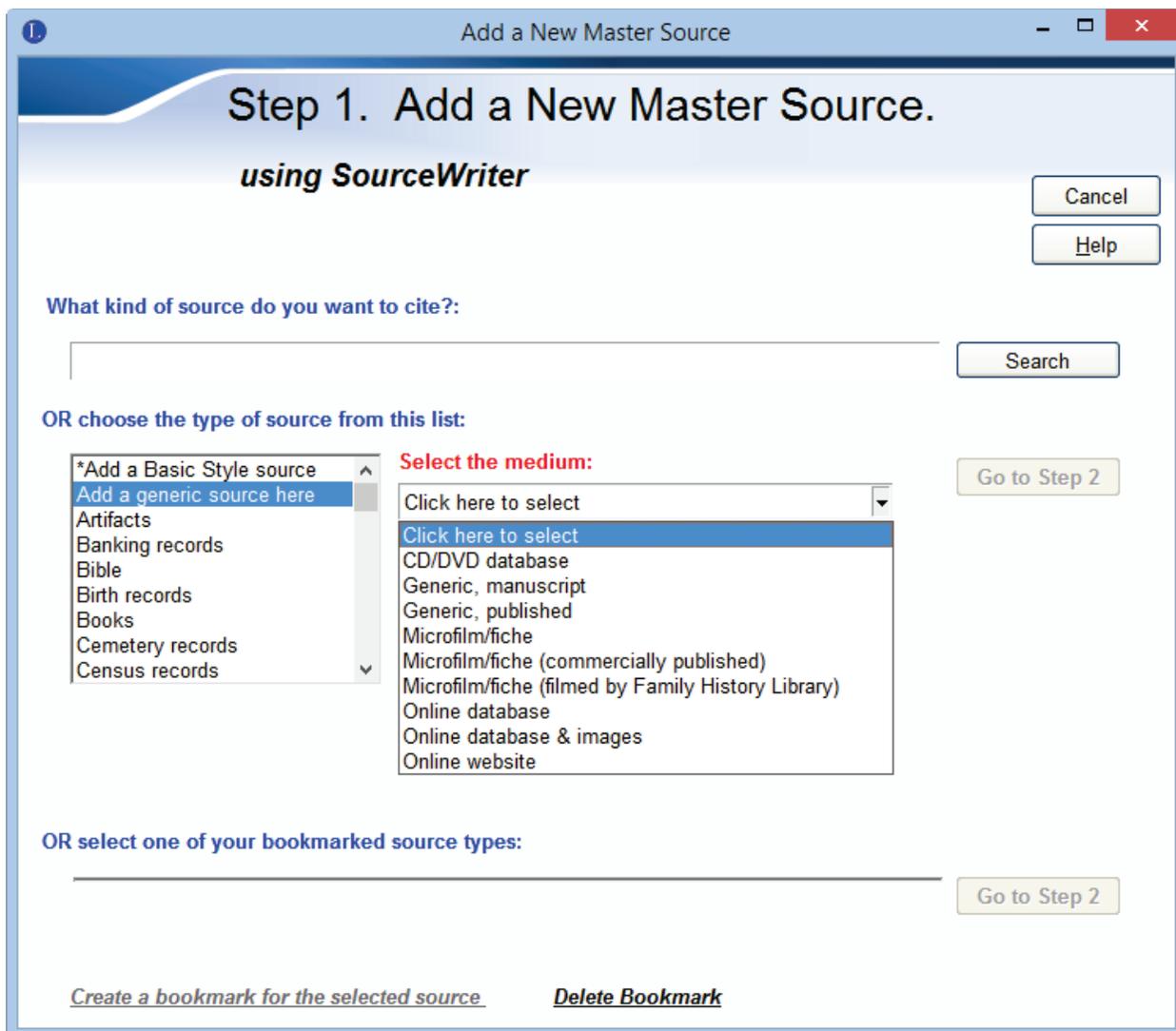
Online images

OR select one of your bookmarked sources:

[Create a bookmark for the selected source](#)      [Delete Bookmark](#)

If you're ever in doubt of which SourceWriter template to use, try to remember the reasons for which we cite our sources. We cite sources to document our findings for a) analysis purposes and b) to help you/others be able to retrieve the same source in the future. With this in mind, I believe that the *content* of the citation trumps the *style* of the citation. So if I'm not sure which template to use, I won't be hauled away by the citation police, unless I don't record anything.

Having said this, if you're not sure which template to use for the type of record you are consulting, you can always use the generic source templates (see image below). The available templates here should cover every type of source that you would consult.



I guess what I'm trying to say is that it is more important to record something about the source than to record nothing because you're stuck on which template to use. But, using the "what's in your hand" concept can make it easier to select the appropriate template. Of course, you can always contact Support or even get the advice of other Legacy users on our Legacy User Group mailing list. We've also published an article entitled [Four SourceWriter Tips](#) which has some other good ideas.

On a more personal note - I just love the SourceWriter. There are times that I'll sit in front of my computer with Legacy opened, and I'll open a person's Source screen and just stare. I love seeing my citations - I love knowing that they conform to standards and that they are consistent. I love filling in the fields and watching the bibliography and footnotes be created on the fly. Um...I'd better stop now, my wife might wonder about this other love affair I have.

### **Are citations enough?**

As researchers, we could add dozens of citations for an ancestor, but that still might not be enough. A list of citations is good, but offers little explanation of how the citations work together. Good research requires proof summaries – a thorough explanation of how the various citations build a strong case for the desired goal. Good researchers will also use a To Do List or Research Log. These tools help plan your research and help you record all of the sources you consulted – whether the results were positive or negative. When you are stuck on a problem, you could give a copy of your research log to a fellow researcher who may offer additional suggestions.