

Documenting Your Sources: The Key to Credible Genealogy

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Megan Clark Young meganyoung@macysgenealogy.com

The second element of The Genealogy Proof Standard is “complete and accurate source citations.” However, think of the elements of the GPS as gears moving together, not as linear steps. Documentation is only done in the context of research and analysis of information. It is not what you do when your research is done.

Genealogy Standards 1-8 (of 90) address documentation (no coincidence that they’re addressed first).

Why We Document:

- demonstrates the extent of our research
- demonstrates the quality of the sources we used
- enables others to replicate our work. "Inability to replicate research casts doubt on its conclusion."

Documentation is how we communicate our research findings in research plans, notes, or reports, family group sheets, charts or trees, posting photos or family documents online, family histories, case studies, lineage society application in the form of citations will be used in two major forms: reference notes and source labels.

We document **information** and **images** we: “gather, use, plan to use, plan to gather, use.”¹ So, the best time to begin our documentation is while creating our research plan or before visiting a repository.

Source: Container of Information. Described by Physical Form

- Original – Work in its original form
 - Facsimiles and image copies are treated as originals as long as they are not visibly altered.
 - Duplicate originals or record copies were created to be exact copies, and are often the closest we will come to the original. Generally treated with the same weight of reliability as an original, though we recognize the possibility of an error may occur any time a copy is created.
- Derivative – Original’s content has been changed
- Authored works – Production or publication using original and derivatives

Information: Level of Reliability

- Primary – Firsthand knowledge
- Secondary – Someone told the source
- Unknown
- Combination

We use the information we analyze and document to build a body of evidence to answer our research objective. The more complex our research question or objective is, the more thorough we need to be with our documentation and analysis. Ideally, aim for at least two independent, original sources that provide primary information. Original records containing primary information are generally more reliable, and thus a higher quality source than derivatives or authored works.

¹ Board For Certification of Genealogists, *Genealogy Standards* (Nashville, Tennessee: Turner Publishing Company, an imprint of Ancestry: 2019), 1–3.

Citations

There is no one "correct" way to write a citation. You have flexibility and a lot of decisions to make regarding what information to include or exclude.

Genealogists use humanities-style citations. See

- *Chicago Manual of Style*, 17th ed.
- *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, 3rd ed., revised
 - See Also <https://www.evidenceexplained.com> and <https://www.facebook.com/evidenceexplained>
- *Mastering Genealogical Documentation*

Wrong Citations mislead or confuse.

Don't cite a source you didn't view

Don't include unnecessary citations in a finished work. Only include the highest quality source or sources necessary to establish your conclusion.

Don't try to cite something that you don't fully understand. To do so would certainly confuse someone else.

Understanding the source includes, at a minimum:

- reading the source information or collection description.
- reading the introduction or front matter of a published work
- reading the first slides of a microfilm publication
- reading a few pages before and after your item of interest to compare it to other examples
- conducting additional research to understand who created the source, why it was created, and what information it conveys.
 - laws and customs of the time
 - religious traditions
 - instructions to census enumerators, etc.

Start by understanding the publication status.

Published Source: "one that has been widely distributed in print, online, or via other media; commercial distribution or sale is not required."

Unpublished Source: "a source for which only one or a few copies exist; not distributed commercially, and rarely circulated."²

Wring out every detail from a source. Only then should you consult *Evidence Explained*.

² Elizabeth Shown Mills, *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, 3rd edition revised (Baltimore: Genealogical Publishing, 2017), 829, 832.

Who	What	When	Where	Wherein
Author(s), Editor(s), Transcriber, Translator	Title of a book, journal, newspaper, or website	Publication	City, State of publication	Page Number
Creator of the record (government entity, church, business organization)	Subtitles, Volume Numbers, Chapter Titles, Article, Titles, or Blog Post	Copyright	County where recorded	Image Number
Informant	Title of a set of records	Written, occurred, recorded	Residence location of the parties	Arranged alphabetically
Subject	Title of a collection	microfilmed or digitized	URL	Arranged by date
(Deeds) grantor, grantee, neighbors	Description of the record if not titled	you accessed the information online	Repository	
(Wills) testator, spouse, children, heirs	Physical Form: ex. family copy, index, a transcription, original		Record Group or Archival Box	
Witnesses, recorder, registrar	Underlying Source Information			

Titles

1. Published standalone works (book, cd, DVD, journal, map, website, etc.): copy the exact title and put it in italics.
2. Files, collections, series, sub-series, & record groups: written headline style, and in quotation marks
3. A Named part of a published book, CD, journal, website: copy the exact title in quotation marks.
4. Titled, but unpublished document: Copy the title and put it in quotations marks.

5. If the source is not published and does not have a title, you can create a description of the source sentence style. No italics or quotation marks should be used. You can also add an explanation in square brackets if necessary.³

URL Options

You can copy and paste the full URL into the citation. This may be especially helpful if the URL contains the letters ark, which stands for Archival Resource Key. This is a persistent or stable URL. This means the image or document should always be available by using that URL. The downside to using the full URL is that they tend to be very long, hard on the eyes, and difficult to type. Your choice of which URL version to include in your citation may depend on how you intend your citation to be used. For example, if you expect your work will only be used digitally, and someone can click on the hyperlink, you could include the full URL.

Example: <https://www.familysearch.org/ark:/61903/3:1:3Q9M-CSQ7-VSV4-Q?i=9&cat=223738>

Alternatively, use a URL to the collection and then use waypoints to the specific image. If you intend your work to be in a printed form, and someone will have to type the information to view it, the collection number with a few simple dropdowns can make the record quicker and easier to locate. The *NGSQ* uses this option

Example: <https://www.familysearch.org/search/film/007842319>

Layered Citations

In order to completely and accurately describe the source we used, we need to cite all the versions, or layers, that went into its creation.

Layered citations are in effect at least two separate citations - one being the original source; one being filmed or digitized version you consulted. The layers are separated by a semicolon.

In our working notes, it is definitely better to err on the side of over-documenting. As you craft your final citation though, you will pare down to include only the most relevant information that clearly describes the source and communicates its quality and location.

Separation Safeguards

- Uniquely numbered footnotes on the same page as the corresponding text
- Metadata
- Include citations on the front of the page only
- Include the total number of pages in the footer

Before uploading an image or photograph add a source label to meet would meet standards and provide a much more credible source to others.

- Microsoft Word – insert the photo (and the back if applicable); and add a text box with the citation. Then, hold down the shift key, and select all of the elements, right click and group them. Then, right click again and save as picture (JPEG).

³ Mills, *Evidence Explained*, 52–53.

- Free online tools like Irfanview or Canva to achieve the same result.⁴

Finished Citation from the deed example:

FamilySearch (<https://www.familysearch.org/search/film/007842319> : accessed 10 December 2021), digital film 007842319, images 10–11, Beaver County, Deed Book G7:7–8, Lecky, administrator of Charles Clarke’s estate, to Fullerton, et al on behalf of the Westfield Congregation, written 13 March 1823, recorded 15 March 1823.

Tips:

- Slow Down
- Transcribe Records (no prize for speed in genealogy)
- Automate what you can
- Create a database of citations
- Modify publisher generated citations to meet your needs
 - Paste without formatting Ctrl + Shift + V (Windows) or Command + Shift + V (MAC)
- Read Citations and Write Citations

For further information:

Board for Certification of Genealogists. *Genealogy Standards*, 2nd edition revised. Nashville, Tennessee: Ancestry, 2021.

The Chicago Manual of Style, 17th edition. Chicago: University of Chicago Press, 2017.

Jones, Thomas W. *Mastering Genealogical Documentation*. Arlington, Virginia: National Genealogical Society, 2017.

———. “Standards for Genealogical Documentation.” Webinar. *Legacy Family Tree Webinars* (<https://familytreewebinars.com/webinar/standards-for-genealogical-documentation/> : accessed 10 December 2021).

Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*, 3rd edition revised. Baltimore: Genealogical Publishing, 2017.

Russell, Judy G. (JG Russel). “Adding a caption using Irfanview.” Instructional Video. *Vimeo.com* (<https://vimeo.com/518186866> : accessed 10 December 2021).

⁴ Judy G. Russell (JG Russel), “Adding a caption using Irfanview,” instructional video, *Vimeo.com* (<https://vimeo.com/518186866> : accessed 10 December 2021).