

DOCUMENTATION AND SOURCE CITATIONS

Diana Elder AG®

“Excellent source citation and documentation begins with the research, not the writing.”¹

Amy Harris AG®

When is a source citation needed?

- Creating a new source on an online tree
- Entering a source into your personal database
- Sharing a document with another researcher
- Writing a family history book
- Writing a proof statement or proof argument
- Writing an article for publication

Why should you cite your sources?

- To evaluate and analyze each source you find
- Prove your research findings and analysis
- Relocate the source and enable others to locate the source
- Show reliability of the source
- Demonstrate the research steps and show the scope of research
- Give proper credit to work not your own

Ethics of Citation

- “Ethics, copyright laws, and courtesy to readers require authors to identify the sources of direct quotations and of any facts or opinions not generally known or easily checked.”²

Choose a Style

- *The Chicago Manual of Style: The Essential Guide for Writers, Editors, and Publishers*, 16th ed. Chicago: University of Chicago, 2010.
- Mills, Elizabeth Shown. *Evidence! Citation & Analysis for the Family Historian*. Baltimore: Genealogical Publishing Co., 1997; revised, 20th printing, 2014.
- Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*. 3rd ed., rev. Baltimore: Genealogical Publishing Co., 2017.
- *MLA Handbook for Writers of Research Papers*, 7th edition. New York: Modern Language Association of America, 2009.

SOURCE: A document, book, article, microfilm, photograph, website, etc. that gives you information, which becomes evidence in proving a conclusion.

CITATION: A statement identifying the specific location of a source and details about that source.

¹ Amy Harris, “Documentation and Source Citation.” *Becoming an Excellent Genealogist: Essays on Professional Research Skills*. Kory L. Meyerink, Tristan L. Tolman, Linda K. Gulbrandsen ed., (The International Commission for the Accreditation of Professional Genealogists, 2012), 175.

² *The Chicago Manual of Style: The Essential Guide for Writers, Editors, and Publisher*, 15th ed. (Chicago: University of Chicago, 2003), 594.

- Turabian, Kate L. *A Manual for Writers of Research Papers, Theses, and Dissertations: Chicago Style for Students and Researchers*, 8th edition. Wayne C. Booth, Gregory G. Colomb, and Joseph M. Williams, editors. Chicago: University of Chicago Press, 2013.

Steps to citing a source

A good source citation will include details that allow you or anyone else to locate the source.

- **Step One: Understand the source**
 - Closely examine the source
 - Note all the information included in the source
 - Discover who created the source - you may need to do some investigating if this is a website or a photocopy of a document.
- **Step Two: Create your citation by determining each component of a citation**
 - Author
 - Title
 - Publication
 - Location

“Careful attention to the style and content of citations . . . is the badge of an advanced genealogical researcher.”

Amy Harris

Components of a Citation

Author

This refers to either the author of the source, the creator (often a religious or government entity), or the informant. In the example below, Carter County, Oklahoma is the government entity that issued the marriage license.

Carter County, Oklahoma, copy of original marriage license and certificate, unpaginated, Shults-Rayston, 11 December 1898, Indian Territory Southern District, recorded 1943, County Court Clerk, Ardmore, Oklahoma.

Title or Description of the source

If this is a published work such as a book, include the full title in italics. If it is not published, such as a personal history, use quotes around the title. If there is no title, describe the record, as shown here.

Carter County, Oklahoma, **copy of original marriage license and certificate**, unpaginated, **Shults-Rayston**, 11 December 1898, Indian Territory Southern District, recorded 1943, County Court Clerk, Ardmore, Oklahoma.

Publication Information

- Typically cite the year a book or microfilm was published; for a journal or magazine, add the month or season.
- For a website, add the access date. Because URL's change, the date could help to relocate the source.
- If the source is unpublished, use the date it was created or the date of the event it reports. In some cases, it might be necessary to include both, as shown below.

Carter County, Oklahoma, copy of original marriage license and certificate, unpaginated, Shults-Rayston, **11 December 1898**, Indian Territory Southern District, **recorded 1943**, County Court Clerk, Ardmore, Oklahoma.

Location within the Source

- In a published source, this could be a volume or page number.
- In an online database, cite the image number, way points, or any other way to explain to others how to find the source again.
- For a government certificate, this would be the document number.
- If a source is not published, such as an unbound collection of documents, try to identify an order and describe it: "folio 3, page 25."
- In the example below, the marriage record has no document number, so it is designated as "unpaginated."

Carter County, Oklahoma, copy of original marriage license and certificate, **unpaginated**, Shults-Rayston, 11 December 1898, Indian Territory Southern District, recorded 1943, County Court Clerk, Ardmore, Oklahoma.

Location where the source can be viewed

- If the source is published, such as a book, this would be the publication location.
- If an unpublished source, such as a manuscript, letter, or document, name the location where the event took place and where the source is held.
- The example below shows the location of both the original marriage jurisdiction and where the marriage record is currently located.

Carter County, Oklahoma, copy of original marriage license and certificate, unpaginated, Shults-Rayston, 11 December 1898, **Indian Territory Southern District**, recorded 1943, County Court Clerk, **Ardmore, Oklahoma.**

Layered Citations³

What about a source that is now digitized and accessed through a website such as *FamilySearch* or *Ancestry*? Include both the physical source citation, then all the digital source citation information,

³ Layer Citations is the term coined by Elizabeth Shown Mills in "Fundamentals of Citation," *Evidence Explained*, 3rd ed. (Baltimore: Genealogical Publishing Company, 2015), 58.

separating the two sections with a semicolon. A third section might be necessary if referencing the original microfilm reproduction of the source, as shown below.

Mason County, Kentucky, “Marriage Bonds, Book 4, 1855-1857,” Scott–Frank bond (2 September 1857); database and digital images, “Kentucky Marriages, 1797-1954,” image 305, FamilySearch (<https://familysearch.org> : accessed 24 Jun 2012); citing FHL Microfilm 281,846.

Different Citation Formats are used depending upon the project.

- **Reference notes** are used to prove a fact such as the date or place of an event. The previous examples used this format, which would also be used when uploading a source to an online tree, writing a research report, in a genealogy database, or a publication. Reference notes in a report can appear in two places.
 - **Footnotes:** inserted throughout the article, referenced by number and appearing at the bottom of the page; the preferred method for research reports
 - **Endnotes:** listed at the end of a chapter, article, or book

The following example shows a citation referencing a specific page in the book.

Thaddeus Brockett Rice, *History of Greene County Georgia*, (Macon, Georgia : J.W. Burke Company, 1961), **394**.

Shortened reference notes are used after the first full citation in a report, as shown below.

Rice, *History of Greene County, Georgia*, 394.

- **Source List Entry:** Often called a bibliography, this is the master list of books, microfilm, or other sources we have consulted for our research. This is usually used at the end of a book or an article. No specific mention is made of page numbers or other details. Authors are listed alphabetically by last name.

Rice, Thaddeus Brockett. *History of Greene County Georgia*. Macon, Georgia : J.W. Burke Company, 1961.

Tips for Accreditation Candidates

- No specific style format is required, but be consistent with style formats throughout the project
- Create a citation template, especially for commonly used sources such as a census
- Citations in the report, research log, family group sheet, pedigree sheet, and documents should match
- Avoid cutting and pasting from websites with improper templates

- Create the citation in the research log then copy and paste into the genealogy database, the research report, and the front of the document.
- Include citations for negative searches.
- Use the full citation the first time in the report, then abbreviate.
- Once the report or article is complete, create the shortened citations.

Source List

1. Harris, Amy. "Documentation and Source Citation." *Becoming an Excellent Genealogist: Essays on Professional Research Skills*. Kory L. Meyerink, Tristan L. Tolman, Linda K. Gulbrandsen editors. The International Commission for the Accreditation of Professional Genealogists, 2012.
2. Jones, Thomas W. *Mastering Genealogical Documentation*. Arlington, Virginia: National Genealogical Society, 2017.
3. Jones, Thomas W. *Mastering Genealogical Proof*. Arlington, Virginia: National Genealogical Society, 2013.
4. Mills, Elizabeth Shown. *Evidence! Citation & Analysis for the Family Historian*. Baltimore: Genealogical Publishing Co., 1997; revised, 20th printing, 2014.
5. Mills, Elizabeth Shown. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace*. Third Edition. Baltimore: Genealogical Publishing Company, 2015.