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Documentation and Evidence:
So, just what am I supposed to document?

This presentation will look at what sources are and how they should be entered. Please review the National Genealogical Society Standards at

www.ngsgenealogy.org/comstandsound.htm. Where there is a difference of opinions, I will try to explain the different methods and the rationale behind some of them. I will point out common errors in trying to include scanned images in sources in PAF and how to avoid those errors.

The purpose of source citation (documentation) is to identify where the information came from as completely as possible and to make it possible for that source to be located from the citation. Better yet, when possible, why not include the source with the citation. You can do this by using "image." However, you need to be careful. In most cases, you need to add the scanned image to the citation detail, not to the source itself.

A. Rules for Good Documentation

1. Document as you go. Don't enter data unless you enter the source (*Mary Jones group record* is an acceptable source if that IS where you got the information).
2. Enter sources and notes in a consistent format.
3. Enter a source description only once.
4. Use confidential information with discretion and sensitivity.
5. List all sources found for each event.
6. List sources for all conclusions and all data, even if not an event. For example, list the source of a middle name (in PAF, use "individual sources")
7. Identify and document conflicting or missing information.
8. Avoid using abbreviations.
9. Specify additional research where needed.
10. Strive to obtain primary sources for each event.
11. Welcome input and constructive review of your documentation.
12. Identify all researchers by name for all contributions, including your own.
13. Recognize that good documentation requires continuous refinements.

B. The Difference Between PAF Notes and Sources

1. A note or notes give more detailed information about a person, as well as recording activities that cover a period of time or cover more than one place.

    a. The details of a person's education, occupation, places he or she lived, and accomplishments are examples of items that we call notes.

    b. A biography or narrative about a person usually is a note, rather than a source.

2. A source could be an oral or a written account of a person, a document, a book, or other media.

    a. A source is a specific description of where we got the information used in entering the family history event or other data.

  b. A source description and/or citation detail give the information required to identify the source as a distinct, traceable record.

  c. Sources document the events that validate the existence of our ancestors and their familial relationships. Some are connected to an event such as a birth, christening, marriage, death, burial, or other event. Others remain "individual sources" unassociated with a particular event.

  d. The details from a source are the skeleton of our family tree.

 3. The distinction between notes and sources as used in PAF.

  a. A **Note** screen allows you to enter any text you want to enter.

  b. A **Source** screen has a template with fields to record the information required to identify, evaluate, and quote your source of information.

  c. PAF prints the sources as footnotes with superscripted reference numbers; notes are printed following the standard entry for all the children on group records and imbedded or added separately when publishing.

  d. Source entries are reusable while you "copy and paste" information from one note to another.

  e. There are also "individual sources" as well as event sources. From the individual edit screen, the "individual sources" button is on the right. This is for sources that do not apply to an event, but rather to the person or your conclusions about his or her place in the family.

C. The Difference between Source Record and Citation Detail

 1. A source record in PAF has title, author, publication information, comments, repository, call number, actual text and image.

 2. A source citation adds film number, volume, page number, date, comments, actual text, and image.

 3. Both source record and source citation have fields for actual text and image. The difference is that the any comments, actual text, or image placed in the source record will apply to anything cited from that source. Image and actual text given in the source citation apply to that citation only. For example, a source might be the 1860 census record of a particular place. Several of your ancestors' families are listed in that place. The source might be the census record for that place, but a citation would be the specific page that had a family. Thus, each family might cite the same source (1860 census of [place]), but each citation would list the page of the census record on which that family appeared. The image of a particular page would only be attached to the citation for the family that appeared on that page.

D. Sources -- unique or grouped

You need to decide how to list your sources, have a method for organizing them, and be consistent in how you use them. Here and under **E** are some of the decision you must make.

 1. Should each source listed be unique, or can different sources be combined into a source title that represents a group of similar but unique sources?

a. Unique - each source should be cited separately. Just because two entries are on the same film does not mean they are the same source. Combining two separate entries into one source title corrupts the purity of the source.

b. Grouped - birth dates given for two different individuals in the same book are different people and citations, but are the same source title. If one cites page 12 of a filmed church record and another page 36 of the same filmed record, they are the same source, but with 2 different "citation details." The citation maintains the purity of the source as long as it is used to distinguish the two.

c. Note that "grouped" is a departure from the respected book *Evidence*! by Elizabeth Shown Mills, which suggests that each source must be unique. This book insists that two families on the same page of the same census record should be two difference sources because the informant in each case was different and therefore the source was different. I suggest that this unnecessarily lengthens and complicates the source titles database.

2. Computer programs are designed to accommodate either method, though the organization seems to imply that 1b (grouped) is the norm.

3. Whichever method is used, make sure the purpose of source citation is accomplished (identify source, help locate)

E. Generic Syntax for Source Titles (as proposed by SVPAFUG with my comments in [brackets])

1. Title begins with Record Type

   Record Type then Location e.g., Parish Records: England, Devonshire, Okehampton

   Record Type then Surname e.g., Birth Certificate: Dearing {first name, date}

2. Title begins with Place Name (Location)

   Location then Record Type, e.g., England, Devonshire, Okehampton; Parish Records [church records]

   Location then Surname then Record Type, e.g., England, Devonshire, Okehampton: Dearing; Birth Certificate [Civil Registration?]

3. Title begins with Surname

   Surname then Record Type [date], e.g., Dearing, John: Birth Certificate

4. Personal Preference: A mixture of the first two. Most records use method 2. This groups records for one place together. It seems more useful to have all the sources for Yorkshire, England together rather to have all birth records from many countries together. Some records such as Bible Records, can't reasonably be sorted by place. What would you use for place—the place of publication, the place where the family lived when the bible was started (do we know that?)? It seems better in this case to use method 1 (Bible Records: Dearing)

5. Further departure from "rules". I think that if you receive information from someone, the source of the information is that person unless they cite a source.

   a. The repository address is the person's address. Whether the information is given by

mail, email, phone call, or personal visit is a citation detail. I prefer to list it as "Personal Communication – Smith, Thomas" I then put the date and whether it was a phone call, email, or letter in the citation detail.

    b. If they cite a source, your source is the one they cite, but the citation should include "as cited by [insert name of person] in email dated [insert date]."

F. What to Include

Many of today's genealogists complain about documentation practices in the 1950's. Too many of us have seen those long group sheets with lots of sources listed, but nothing telling you which item of information came from which source. Even the careful, well-trained researcher made what we today consider to be inadequate documentation.

I suggest that twenty years from now, the next generation will look at the turn of the century and point out the prevalent shortcoming of documentation today. In 2025, one will say, "They recorded where information came from, but didn't explain their reasoning or why they picked one date over another." **DOCUMENTATION IS MORE THAN JUST SOURCES**. It must also include explanations—even what isn't there (e.g., There was no birth certificate, so I used a combination of the family bible and the local church baptism record…)

Much of the information for this presentation is drawn from the publication *Family History Documentation Guidelines 2nd Edition, 2002/3* by the Silicon Valley PAF Users Group. A copy of this publication can be ordered from: Silicon Valley PAF Users Group, P.O. Box 23670, San Jose, CA 95153-3670, USA,

www.svpafug.org/docguidelines.html - list price: $10.00 each. Discounts for bulk orders are available.