

A Course Outline for Family History Documentation

This course outline has been offered for use in teaching sound Family History Documentation methodology. It is designed to be used with the Family History Documentation Guidelines, July 2000 Edition, published by the Silicon Valley PAF Users Group. It may be used for any non-profit training program. Any attempt to use this material for profit is strictly prohibited.

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Invitations to present this material for genealogical societies and family history classes will be accepted depending on availability. Only travel expenses outside the San Francisco Bay area must be covered.

Lesson One

Duration: 90 minutes with 10 minute break.

Concept A: Why Document. 15 minutes.

The accuracy and completeness of family history information can be gauged by the quality of the sources of the information. When something is entered into a family history file based on the fact that “aunt Mildred always used to say that great grampa William was born in Budapest in 1865”, a good genealogist will want to know what other source there might be to validate that detail. When misinformation is entered in a database, it can lead to a variety of calamities. For example:

1. The wrong ancestors can be linked to the family.
2. Many hours of time can be wasted searching in the wrong places .
3. Locating the correct ancestral information will take much longer.
4. Family history will become family lore.
5. Records submitted to other databases promulgate bad information worldwide.
6. Anyone trying to validate your work will be unable to find your sources.
7. You become guilty of JUNK GENEALOGY.

In the excitement of finding some long sought after source of your roots, it is easy to want to enter the data and “add the source information later”. Conscientious researchers will resist this urge and will always document as they go.

Discussion: Discuss issues such as the value of personal knowledge as documentation, family records that contain “lore” that has never been substantiated, or information

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gathered from published sources that conflict with your own data. Use examples of wasted time following wrong leads.

Concept B: What is a Source? 20 minutes.

A source is typically a collection of information with many details about many different people, families and communities. A census will contain details about whole populations. A parish record will contain details about events that occurred within a congregation of many years. A history book will often have references to details of important people in a community. Even the certificate for a specific event such as a marriage will contain information about the couple as well as their parents. So a source usually a collection of information that will be used to document many events for many people in your database. The ideal is to document the source only once, and then refer to that source entry over and over again for each person it covers.

Discussion: Describe how earlier versions of genealogy software only allowed a Notes page for documentation and that every time a source was used, it had to be copied over and over again. Now with better software, we have the capability to enter the source information once, and then “link” individual events to the same source entry as many times as we want. Use a diagram such as the one below to illustrate the point. As straightforward as it seems, the concept of a single source entry with many events linked to it is often not grasped easily by beginners.

Old documentation method with Notes Screen:

!BIRTH: Wheeler, Richard Anson; “History of the Town of Stonington, County of New London, Connecticut, from its First Settlement in 1649 to 1900, with a Genealogical Register”; NewLondon, Connecticut; 1900; page 693; Santa Clara County Library, Santa Clara, California.

Wheeler’s book may contain dozens of your family’s ancestors, so each time you need to document someone’s birth, or death, or marriage, the above source entry would have to be repeated for each individual.

!BIRTH: Wheeler, Richard Anson; “History of the Town of Stonington, County of New London, Connecticut, from its First Settlement in 1649 to 1900, with a Genealogical Register”; NewLondon, Connecticut; 1900; page 693; Santa Clara County Library, Santa Clara, California.

!CHRISTENING: Wheeler, Richard Anson; “History of the Town of Stonington, County of New London, Connecticut, from its First Settlement in 1649 to 1900, with a Genealogical Register”; NewLondon, Connecticut; 1900; page 580; Santa Clara County Library, Santa Clara, California.

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!MARRIAGE: Wheeler, Richard Anson; "History of the Town of Stonington, County of New London, Connecticut, from its First Settlement in 1649 to 1900, with a Genealogical Register"; NewLondon, Connecticut; 1900; page 704; Santa Clara County Library, Santa Clara, California.

!DEATH: Wheeler, Richard Anson; "History of the Town of Stonington, County of New London, Connecticut, from its First Settlement in 1649 to 1900, with a Genealogical Register"; NewLondon, Connecticut; 1900; page 509; Santa Clara County Library, Santa Clara, California.

And so on. Even if you could use the Windows Cut and Paste feature, it is not the best way to document sources.

The current method of entering source documentation is to document the source only once and then link "citations" about each event over and over again.

"History of the Town of Stonington, County of New London, Connecticut, from its First Settlement in 1649 to 1900, with a Genealogical Register"; Wheeler, Richard Anson; NewLondon, Connecticut; 1900; Santa Clara County Library, Santa Clara, California.

Notice that there is nothing in this entry that is specific to an event. It only contains the general information about the source. Each reference to a birth, or a death, or a marriage, will be entered as a citation that is linked to the above entry.

Page 693 for the birth of an individual.

Page 708 for the death of another individual.

Page 789 for the marriage of a couple.

And so on. It is easy to see that this is a better way.

Describe this concept in some detail using as many examples as time permits to illustrate how a source document is entered once and individual events are linked to it. Discuss such examples as the IGI, a census, the Ancestral file, a CD-ROM, the Social Security Index, a family Bible, cemetery records, church records, probate records, personal knowledge, family records, certificates, and so forth. It is essential that the class understand the distinction between the source, and a citation from the source.

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Concept C: The Difference between a Source and a Note. 10 minutes

Reading: Chapter One of Family History Documentation Guidelines.

It is often difficult to figure out when something should be documented as a Source and when something should be an entry in the Notes screen. This distinction is ultimately a personal preference, but it is good practice to follow some consistent guideline so that your data will be uniform and others will understand your work. A good sense of when to use a source entry and when to enter a note will help others feel confident that you are a competent researcher.

A source entry should be used when the item being documented is an event or statement that confirms a genealogical relationship. For example, the date and place of birth of a child born to the parents is clearly something that should have a citation linked to a source. Births, christenings, deaths, burials, and marriages or the most often events that should be documented with a source entry and citations. When specific events are not known, a statement indicating a familial relationship such as “person A is the daughter of Couple B” may be all you have. But this information warrants a source entry with a citation.

On the other hand, the occupation, education, accomplishments, accolades, residences, and other biographical detail that do not relate to family relationships are typically items that should be documented in the notes section of your database.

Discussion: Emphasize that this is a personal preference, but that it is recommended that biographical / historical information be kept separate from the essential genealogical events that document the family relationship.

BREAK: 10 minutes

Concept D: How to Create a Source Entry. 20 minutes

Reading: Chapter Two of Family History Documentation Guidelines

Note: If possible, have a projection unit available to display the screens from a laptop using the PAF 4 software. Other software programs may be substituted if preferred.

Display the Edit Individual screen as shown on page 14. Explain that this is the screen used to attach source entries and citations, as well as to add notes. Describe the function of the “s” buttons, and the buttons on the right side of the screen (save, cancel, options, help, notes, source, etc.).

Emphasize that the source entry is going to be stored in a separate place and is not part of the individual’s record, even though it might be created while working from the individual’s Edit Individual screen. Explain that the Citation is what links the individual to the source entry.

Explain the difference between the “s” button in the Personal Section and the “s” buttons

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in the Events and Other sections of the Edit Individual screen.

Click on one of the “s” buttons and display a blank Select Source window as shown at the bottom of page 14. Explain how the very first time a source entry is made, this screen will start out empty. Indicate that the first time you must click the New button to enter the first Source entry.

Using the Edit Source screen as shown on page 15, describe in detail how each field is entered. Don’t discuss the Source Title format in detail at this point. This should be covered later in the lesson. Explain the Print in Italics and Print in parentheses check boxes, and the Repository button. Explain that the Actual Text and Comments fields are only for non-specific details about the source and not for the specific event being documented.

Show that when they click OK, the source entry appears in the Select Source list. Explain that the entry must be selected in order to enter a citation. Bring up the Citation Detail screen as shown at the top of page 17. Explain that the top portion of the screen cannot be edited because it is the source entry. Show how the Citation Detail is entered on this screen and explain the guidelines for filling out each field. Explain that here is where the Actual Text and comments about the specific event should be entered. Show the process of entering Actual Text with its separate window.

If time permits, go into the Image features.

Save the citation and return to the Edit Individual screen to show that the “s” button now contains an asterisk and that the Source icon button also contains an asterisk.

Discussion: Reiterate the difference between the source and the citation. Explain how an event can have multiple citations. Show how multiple citations can be used to cover different dates for the same event. Do not leave this topic until you are certain that the concept of a source and a citation are understood.

Concept E: The Significance of the Source Title. 15 minutes

As the list of sources in the Select Source list grows, the format of the Source Title becomes critical to make it easy to locate a source when it is to be used for a new citation. If the source list is properly managed, it will prevent creating duplicate entries and it will facilitate finding a source when you want to attach a new citation. Indicate that the list is always in alphabetical order, so that the format of the Source Title determines where in the list an entry will appear. You may show the example on page 19.

If possible switch to a different database that contains many entries in the Select Source list to illustrate the concept. Now explain the recommended methods for Source Title syntax as found on page 6 and described in detail on pages 24 and 25. Again, you should emphasize that the sequence of the sources in the source list is a personal preference, and that the guidelines are only recommendations.

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Explain the three basic formats recommended for source titles and that you may use more than one format and you may combine them. Emphasize that the format is a personal preference and that the format you use should be the one that will make it easiest for you to locate a source entry when the list gets long.

Method 1: Record Type: Location; Date
 or
 Record Type: Surname; Date

Method 2: Location: Record Type; Date
 or
 Location: Surname; Date

Method 3: Surname: Record Type; Date

Take the time to give examples of each type and show how they will appear in the Select Source list.

Discussion: Spend time answering questions about when to use the title of a publication, and when to use the record type as the first element of a source title. Try to convey the notion that you should think about where the entry will be put in the alphabetical list when they enter a source title. Show how using group names will be helpful to keep the list manageable. For example, the notion of Family Records as a title that refers to a file cabinet or a binder full of documents. This will eliminate the need to have a source entry for every document in the file cabinet.

Be sure to answer all remaining questions.

Remind class members that questions about documentation can always be posted on the Silicon Valley PAF Users Group web site under the ROOTStalk page. The documentation committee will attempt to give answers to all questions.

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End of Lesson One