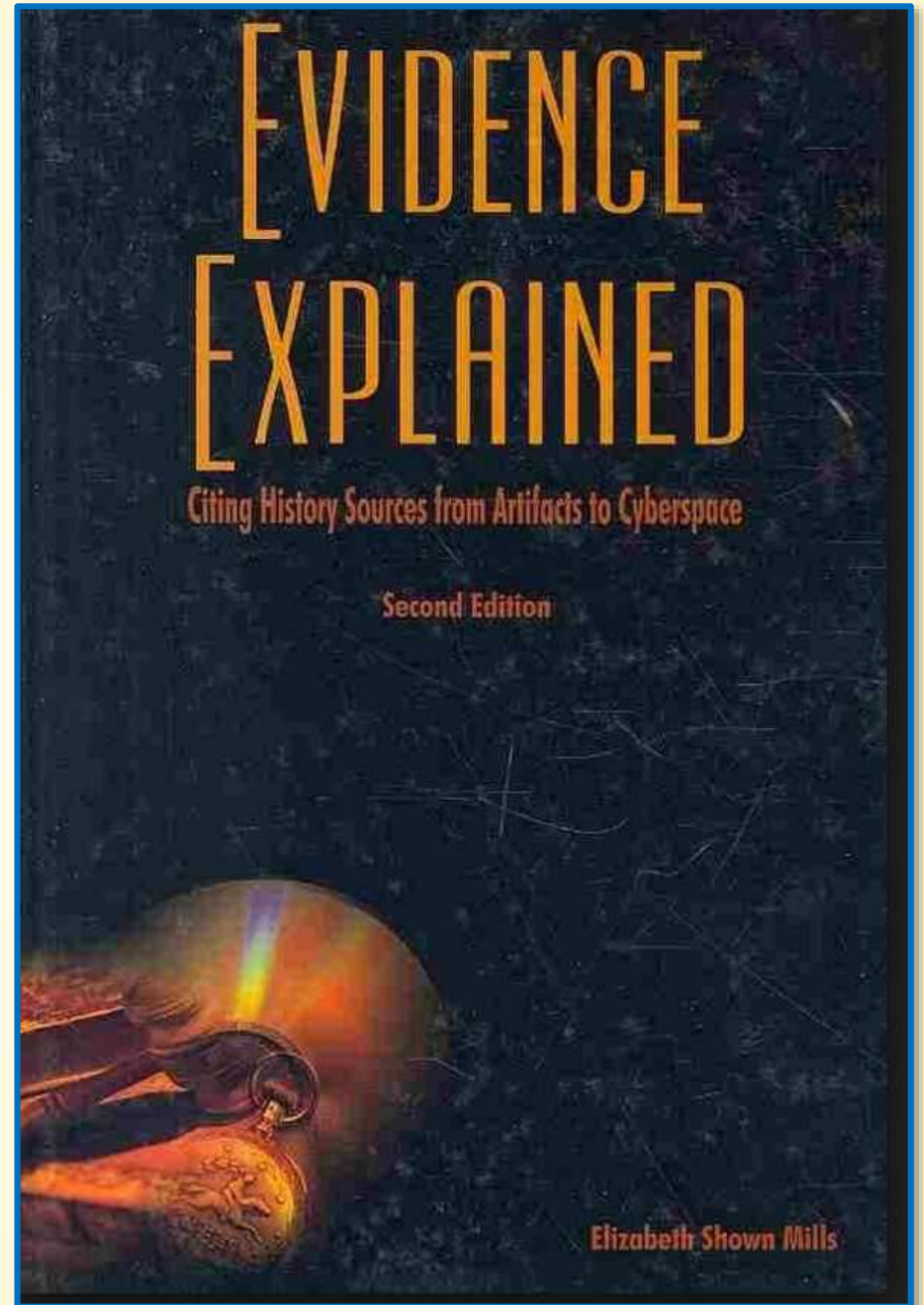Creating *Source Templates for The Master Genealogist*

Behind the Curtain

The Beginning

- In January 2010, the Tri-Valley TMG Users Group began our exploration of Elizabeth Shown Mills' *Evidence Explained*.

- We planned to create a small set of TMG source type templates for our members.

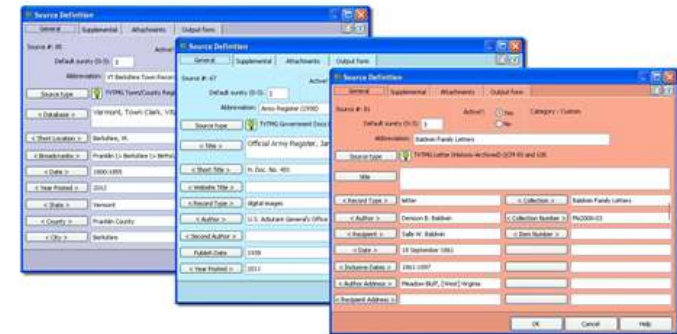- This was planned as a one-year project.

Three Years Later …

- The Tri-Valley TMG Users Group's *Source Templates for The Master Genealogist: A guide for creating computerized genealogical source citation templates* appeared for sale on Lulu.com.

- How did this happen?

The Initial Goal

- Examine ESM's citation format – and the reasoning behind that format – for some of our most commonly-used record types

- Determine whether or not we could make TMG source type templates for these records that matched those in *EE*

- Create a set of source type templates for the members of our group to be used when citing those record types

The Philosophy

- We started a private blog where we could post assignments, questions, and comments.

The First Stage

- Members contributed a list of their five most-used record groups, and we picked the following for our first few meetings:
  - U.S. census digital images online
  - Grave markers in a rural cemetery and *Find A Grave* records
  - State-level death certificates
  - State-level death certificates, digital images and microfilmed copies
  - Books, real and digital images

TVTMG Census (US digital online) QCM 240

- Each member created a source type template
- *No one* had a template that matched Mills exactly
- There were lots of differences – in details and in philosophy

TVTMG Census (US digital online) QCM 240

FULL FOOTNOTE:

[CENSUS ID], [COUNTY], [STATE]<, [SCHEDULE]>, [CD2], [CD1]; digital image, [ITAL:][REPOSITORY][:ITAL] ([REPOSITORY ADDRESS] : accessed [CD3]); citing NARA microfilm publication [FILM NUMBER], roll [ROLL NUMBER]<; [CM]>.

1900 U.S. census, Tazewell County, Virginia, population schedule, Tazewell Mag. District, Tazewell town, ED 99, p. 172 (stamped), sheet 11A, dwell. 180, fam. 188, Robert M. Baldwin household; digital image, *Ancestry.com* (http://www.ancestry.com : accessed 15 May 2010); citing NARA microfilm publication T623, roll 1730.

SHORT FOOTNOTE:

[CENSUS ID], [SHORT LOCATION], [CD2], [CD1]<; [CM]>.

1900 U.S. census, Tazewell Co., Va., pop. sch., Tazewell Mag. District, Tazewell town, ED 99, p. 172 (stamped), sheet 11A, dwell. 180, fam. 188, Robert M. Baldwin household.

BIBLIOGRAPHY:

[STATE]. [COUNTY]. [CENSUS ID]<, [SCHEDULE]>. Digital images. [ITAL:][REPOSITORY][:ITAL]. [REPOSITORY ADDRESS] : [YEAR].

Virginia. Tazewell County. 1900 U.S. census, population schedule. Digital images. *Ancestry.com*. http://www.ancestry.com : 2004.

<[DOCUMENT], ><[COUNTY] County, ><[STATE], ><[RECORD TYPE], ><[CD2, ><[CD1>; digital image, <[ITAL:][REPOSITORY][:ITAL] >(<[REPOSITORY ADDRESS]>< : accessed [CD3]>)<; citing [PUBLISHER]>< microfilm publication [FILM]><, roll [ROLL]><; [CM]>.

Short footnote

[SHORT TITLE]<, [CD2]><, [CD1]><; [CM]>.

Bibliography

[STATE]. [COUNTY] County. [DOC...
publication [FILM]><, roll [ROLL]>.
ADDRESS]>.

Full Footnote:
Census [YEAR], U.S. ...
population schedule<, ...
page/sheet [CD4]><, [C...
[CD6]><, family [CD7...
[FILM NUMBER]><; (...
TITLE]< [CD1] househo...

Short Footnote:
[SHORT TITLE]< [CD1...

Bibliography:
Census [YEAR], U.S. ...
population schedule, ...
Washington D. C.: Nati...

Full footnote:
[CENSUS ID], [COUNTY], [STATE]<, [SCHEDULE]>, [CD2]<, [CD3]><, enumeration district (ED) [CD4]><, [CD5]><, dwelling [CD6]><, family [CD7]><, line [CD8]>, [CD1]; digital image, [ITAL:][REPOSITORY] [:ITAL] ([REPOSITORY ADDRESS] : accessed [CD3]); citing NARA microfilm publication [FILM NUMBER], roll [ROLL NUMBER]<; [CM]>.

Short footnote:
[CENSUS ID], [SHORT LOCATION], [CD9]<, [CD3]><, ED [CD4]><, [CD5]><, dwell. [CD6]><, fam. [CD7]><, line [CD8]>, [CD1]<; [CM]>.

[CD2] is Civil Division
[CD3] is stamped page number, 1880-1930 (optional if using [CD5] below
[CD4] is enumeration district
[CD5] is Page ID, all censuses, but optional if using [CD3], above
[CD6] is dwelling, 1850-1930
[CD7] is family, 1850-1930
[CD8] is line number, 1790-1840
[CD9] is abbreviated Civil Division

Lumper or Splitter?

- Some of us were lumpers – one even lumping all 1850 census records in a state under the same master source

- Some of us were splitters – a few creating master source entries for each individual household

- **Decision one:** Compromise – the master source unit for U.S. census records would be the microfilm roll. This made the transition from census microfilm citation to census digital image citation simple – until the 1940 census opened, that is

Handy-Dandy Lumper-Splitter Tracker

Full Footnote			TVTMG Version	
Example	**State as Source Unit**	**County as Source Unit**	**Microfilm Roll as Source Unit**	**Household as Source Unit**
1900 U.S. census	[CENSUS ID]	[CENSUS ID]	[CENSUS ID]	[CENSUS ID]
Tazewell County	[COUNTY]	[COUNTY]	[COUNTY]	[COUNTY]
Virginia	[STATE]	[STATE]	[STATE]	[STATE]
population schedule	[SCHEDULE]	[SCHEDULE]	[SCHEDULE]	[SCHEDULE]
Tazewell Mag. District, Tazewell town, ED 99, p. 172 (stamped), sheet 11A, dwell. 180, fam. 188	[CD2]	[CD2]	[CD2]	[CD2]
Robert M. Baldwin household	[CD1]	[CD1]	[CD1]	[CD1]
digital image	digital image	digital image	digital image	digital image
Ancestry.com	[ITAL:][REPOSITORY][:ITAL]	[ITAL:][REPOSITORY][:ITAL]	[ITAL:][REPOSITORY][:ITAL]	[ITAL:][REPOSITORY][:ITAL]
http://www.ancestry.com	[REPOSITORY ADDRESS]	[REPOSITORY ADDRESS]	[REPOSITORY ADDRESS]	[REPOSITORY ADDRESS]
accessed 15 May 2010)	accessed [CD3]	accessed [CD3]	accessed [CD3]	accessed [CD3]
citing NARA microfilm publication T623	citing NARA microfilm publication [FILM NUMBER]	citing NARA microfilm publication [FILM NUMBER]	citing NARA microfilm publication [FILM NUMBER]	citing NARA microfilm publication [FILM NUMBE
roll 1730	roll [ROLL NUMBER]	roll [ROLL NUMBER]	roll [ROLL NUMBER]	roll [ROLL NUMBER]
[CM]	[CM]	[CM]	[CM]	[CM]
Short Footnote				
1900 U.S. census	[CENSUS ID]	[CENSUS ID]	[CENSUS ID]	[CENSUS ID]
Tazewell Co., Va., pop. sch.	[SHORT LOCATION]	[SHORT LOCATION]	[SHORT LOCATION]	[SHORT LOCATION]
Tazewell Mag. District, Tazewell town, ED 99, p. 172 (stamped), sheet 11A, dwell. 180, fam. 188	[CD2]	[CD2]	[CD2]	[CD2]
Robert M. Baldwin household	[CD1]	[CD1]	[CD1]	[CD1]
[CM]	[CM]	[CM]	[CM]	[CM]
	[CD1]	[CD1]	[CD1]	[CD1]
	[CD2]	[CD2]	[CD2]	[CD2]
	[CD3]	[CD3]	[CD3]	[CD3]
	[CD4]	[CD4]	[CD4]	[CD4]
	[CD5]	[CD5]	[CD5]	[CD5]
	[CD6]	[CD6]	[CD6]	[CD6]
	[CD7]	[CD7]	[CD7]	[CD7]
	[CD8]	[CD8]	[CD8]	[CD8]
	[CD9]	[CD9]	[CD9]	[CD9]

Split Citation Detail or Not?

- Some users were uncomfortable with TMG's split citation detail feature

- Some users set up a system to use all nine splits

- **Compromise:** We couldn't recreate Mills citations without using some split citation details, but we would try to keep it to a minimum

Caution! Split CDs *do not* migrate well to other genealogy software programs. Keep this in mind if you're thinking of leaving TMG.

Handy-Dandy Split CD Tracker

	CD1	CD2	CD3	CD4	CD5	CD6	CD7	CD8	CD9
EE City Directory (Online) 12.55	subject of interest, entered in quotes EXACTLY as it appears in directory	page number only when citing a single city directory; (Year) Page when citing one in a series	date accessed	used when event is documented by multiple directory years in the same series; enter as (1905) 32, (1906) 126					
EE Death Certificates (Digital Online) 9.33	name of the individual as it appears on the certificate	certificate number, e.g. 10241	date accessed	certificate year					
EE Death Certificates (State Level) 9.41	name of the individual as it appears on the certificate	certificate number, e.g. 10241	certificate year						
EE Death Certificates (State Level, FHL microfilm) 9.42	name of the individual as it appears on the certificate	certificate number, e.g. 10241	certificate year						
EE Family Bible QCM 107	relevant Bible page or section; section title, if an actual title, is placed in quotes; e.g. "Marriages"		date viewed						
EE Land Record (Town or County Level) 10.5 and QCM 488	names of the parties, type of document, and date of document	volume and page; file no., etc. is added here if relevant	date viewed						
EE Land Record FHL Microfilm (Local Level) 10.6 and QCM 493	names of the parties, type of document, and date of document	volume and page; file no., etc. is added here if relevant	date viewed						
EE National Archives Manuscript (Basic Form)	basic identification information for the specific document referenced, usually name and document type	additional document identification not required in subsequent footnotes; e.g. date and place, etc.	date viewed						
EE Newspaper (Digital image online) 14.22	author, if given; article title in quotation marks, if given; or subject and descriptive label	date of issue and page and column numbers	date accessed						
EE Newspaper (Microfilm) 14.22	author, if given; article title in quotation marks, if given; or subject and descriptive label	date of issue and page and column numbers	date viewed						
EE Newspaper (Original) 14.22	author, if given; article title in quotation marks, if given; or subject and descriptive label	date of issue and page and column numbers	date viewed						
EE Online Database/Images (BLM 11.27)	subject's name or the document creator's name, whichever applies	type of document, number, date, etc., whatever applies	date accessed	county and state. In the BLM example, this is in parentheses					
EE Online Database/Images (Patents 11.51)	subject's name or the document creator's name, whichever applies	description/title of the document; in quotes, if title	date accessed	patent number and the year in parentheses, e.g. "patent file no. 1,261,167 (1918)"					
EE Passenger Lists (digital image) 11.17	name of the passenger	page and line number of the manifest or crew list, the card number of an entry card, etc.	date accessed	name of the ship; enter it in italics; preceding initials (SS, HMS, etc.) are not italicized	names the port of departure and port of arrival, e.g. Kobe, Japan, to Seattle, Washington	date of the ship's arrival			
EE Passenger Lists (online) 11.16	name of the passenger	page and line number of the manifest or crew list, the card number of an entry card, etc.	date accessed	name of the ship; enter it in italics; preceding initials (SS, HMS, etc.) are not italicized	names the port of departure and port of arrival, e.g. Kobe, Japan, to Seattle, Washington	date of the ship's arrival			

Custom Source Elements

- Most of us created some new source elements for this source type template
- None of us duplicated source element names
- **None of us created similar custom elements in the same source element group**
- Lots of discussion ensued

Remember! Only one element per element source group is allowed in any source type template.

Handy-Dandy Source Element Tracker

												General Tab (limited to "Title" plus 14 fields)		
		Obeys "Last Name, First" Rule										Alphanumeric Fields		
	Title	Author	Compiler	Second Person	Subject	Editor	Publisher	Date	Second Date	Location	Publisher Location	Second Location	Film Number	Pages	Record Number
Census (US online subscription)	Optional							Year		State		County	Film Number	Roll Number	
Census (US microfilm)	Optional						Publisher	Year		State	Publication Place	County	Film Number	Roll Number	
Cemetery (Rural) Marker (Alternate)	Optional			Reader				Date		State		County			
Cemetery (Rural) Marker	Cemetery			Reader				Date		State		County			
Cemetery (Urban) Marker (Alternate)	Optional			Reader			City	Date		State		County			
Cemetery (Urban) Marker	Cemetery			Reader			City	Date		State		County			
Cemetery Images Online	Cemetery		Compiler				City	Date		State		County			
Death Certificates (State Level)	Optional	Agency								Jurisdiction	Repository Location				
Death Certificates (Digital Online)	Database	Agency						Year		Jurisdiction		URL			
WWI Draft (NARA digital)	Title							Year					Film Number	Roll Number	
Book (Basic Format)	Title	Author				Author Role	Publisher	Publish Date			Publisher Address				
Book (Basic Online)	Title	Author		Second Author		Author Role	Publisher	Publish Date	Year Posted		Publisher Address	URL			
Book (Electronic Publication)	Title	Author				Author Role	Publisher	Publish Date			Publisher Address				
Article (Journal) (online images)	Journal Title	Author		Second Author		Author Role	Website Name	Date	Year Posted			URL		Page	
Website (Chapter/GenWeb)	Website	Author		Second Author		Author Role			Year Posted			URL			
Church Register (FHL microfilm)	Title	Church					Publisher		Film Range	Location	Publisher Location		Film Number		Item Number
City Directories (Online)	Title	Author		Second Author		Author Role	Publisher	Publish Date	Year Posted		Publisher Address				
MSA original and microfilm		Agency						Date	Film Range	Jurisdiction			Film Number	Rolls Total	Item Number
Federal Land Case Files			Finding Aid		Subject		Land Office	Date		State	Short Repository	County		Document	File Number
County Land Registers							City	Date		State	Repository Location	County			
County Land Registers Microfilm							City	Date	Film Range	State	Repository Location	County	Film Number		Item Number
County Records (Basic-Registers)							City	Date		State		County			
County Records (Basic-Files)							City	Date		State		County			
Online Database/Images (BLM)	Database		Compiler	Second Author		Author Role			Year Posted			URL			
Online Database/Images (Patents)	Database		Compiler	Second Author		Author Role			Year Posted			URL			
Online Passenger Manifests (image)	Database							Year				URL	Film		
Online Passenger Manifests (database)	Database							Year				URL	Film		
National Archives Manuscripts (basic)			Finding Aid		Subject			Date		Location			File Unit Number	Document	RG Number

Our First Good Idea

- One member said he had trouble telling what information belonged in each source element field.

- Would it be possible to match the element name to the name used in *EE*?

EE, p. 281, 6.30, 1900 U.S. Census, Population Schedule, Microfilm (NARA Publication)
EE, p. 240, QuickCheck Model: Digital Images Online Commercial Site

Source List Entry (Bibliography)

Jurisdiction   Census ID   Schedule   Film ID

Virginia. Russell County. 1900 U.S. census, population schedule. NARA microfilm publication T623, roll 1727. Washington, D.C.: National Archives and Records Administration, n.d.

     Publication Place   Publisher   Year

Jurisdiction   Census ID   Schedule   Format   Website Title

Virginia. Russell County. 1900 U.S. census, population schedule. Digital images. *Ancestry.com*
http://www.ancestry.com : 2004.

     URL   Year

Evidence, p. 74 (for comparison)

Virginia. Russell County. 1900 U.S. census, population sch
roll 1727. Washington: National Archives.

[Jurisdiction]. [Census ID], [Schedule]. [Format].

First (Full) Reference Note (Full footnote)

Census ID   Jurisdiction   Schedule

1900 U.S. census, Russell County, Virginia, population sch
district (ED) 54, sheet 11-B, dwelling 197, family 198, Joh

     Household ID

publication T623, roll 1727.

Census ID   Jurisdiction   Schedule   Civil Division   ED & Sheet No.

1900 U.S. census, Russell County, Virginia, population schedule, Copper Creek District, enumeration district (ED) 54, sheet 11-B, dwelling 197, family 198, John C. Fugate household; digital image,

     Household ID   Person of Interest   Format

Ancestry.com (http://www.ancestry.com : accessed 19 February 2010); citing NARA microfilm

Website Title   URL   Date   Credit Line

publication T623, roll 1727.

Comments   ▼ ✕

SusanJ
JURISDICTION comprises two bits of information: State and County. The first reference note reverses the order and changes punctuation – from "Virginia. Russell County." To "Russell County, Virginia." The short reference note abbreviates both to "Russell Co., Va." Formatting is simplified if JURISDICTION is split into two elements: STATE and COUNTY.

SusanJ
SCHEDULE is abbreviated in the short reference note. It follows the abbreviated form of JURISDICTION. Create a SHORT LOCATION element that includes the abbreviated COUNTY, STATE, and SCHEDULE: "Russell Co., Va., pop. sch."

Our Second Good Idea

- Since we had already created the words "digital image" as a *word constant*, one member suggested entering "NARA microfilm publication" the same way.
- Pros:
  - This releases a source element field in the source definition screen
  - This makes updating the template a snap, if/when citation format preferences change
- Cons:
  - This means creating a separate source type template for census images created from a different "source of the source" – oh, well.

Our Third Good Idea

- Let's *use* the source type template reminder area!
- Define *every* element and its contents
- Give *examples*
- Finally, one member asked, "Can we include the *EE* reference in the template name?" Great idea!

Edit Source Type

Custom Source Type : TVTMG Census (US digital online) QCM 240

is most similar to : Census, Federal (Filmed)

Full footnote

[CENSUS ID], [COUNTY], [STATE]<, [SCHEDULE]>, [CD2], [CD1]; digital image, [ITAL:][REPOSITORY][:ITAL] ([REPOSITORY ADDRESS] : accessed [CD3]); citing NARA microfilm publication [FILM NUMBER], roll [ROLL NUMBER]<; [CM]>.

Short footnote

[CENSUS ID], [SHORT LOCATION], [CD2], [CD1]<; [CM]>.

Bibliography

[STATE]. [COUNTY]. [CENSUS ID]<, [SCHEDULE]>. Digital images. [ITAL:][REPOSITORY][:ITAL]. [REPOSITORY ADDRESS] : [YEAR].

Reminder

Duplicates Mills, EE, QuickCheck Model 240.

- [TITLE] is not used in the output; optionally enter a description.
- [SHORT LOCATION] includes the abbreviated county, state, and schedule, as appropriate; example: Bradford Co., Pa., pop. sch. Although the Chicago Manual of Style now allows postal abbreviations for the state, Mills doesn't. Use the standard state abbreviations; e.g., Minn., not MN; Ohio, not OH; Pa., not PA.
- [SCHEDULE] examples: population schedule, slave schedule, etc.
- [YEAR] is the year the images were published on line.
- [STATE] is the state, spelled out.
- [COUNTY] is the county including "County", "Parish", etc.; e.g., Hamilton County or Orleans Parish.
- [CENSUS ID] example: 1850 U.S. census, etc.
- [ROLL NUMBER] is the number following the film number, for example 1730 from (T623_1730).
- [FILM NUMBER] examples: T9, M593, T623, etc.

- [REPOSITORY] is the title of the website.
- [REPOSITORY ADDRESS] is the main website URL, not the address for the image viewed.
Possible template variation: [WEBSITE TITLE] could be substituted for [REPOSITORY] and [URLX] could be substituted for [REPOSITORY ADDRESS], or the template could be amended to include both options. Edit as appropriate. Note that the standard Source Element, [URL], is part of the [SECOND LOCATION] Source Element Group. That conflicts with [COUNTY] in this template, so the alternate Source Element, [URLX], a custom element in the [PUBLISHER LOCATION] Source Element Group, is needed.

- [CD1] is the name of the person of interest. This is usually the name of the head of household, as entered in the census, followed by the word "household." You can omit "household" if it's made clear in the text. If the reference is to someone in the household with a different surname, enter as, "Frank Alexander in the Annie E. Fugate household."
- [CD2] includes the following, as appropriate, in this order: Civil division, Page ID, Enumeration district, [ED page ID], Household ID [dwell. and fam. number for 1850 and later; line number for 1790-1840]. Abbreviate dwell. and fam., then correct first reference note to dwelling and family.
- [CD3] is the date you viewed the image. These templates reserve [CD3] for the date any source is viewed.
- [CM] is used for analytical notes.

Going Public

- Late in the year, we began a public blog with some of our completed templates.
- We included variations from the Mills citation formats.
- We included a list of all new custom source elements used in each template.
- We got requests for help from international TMG users!

June 2010 Files

Kay is going to be our guest presenter this month as we investigate citing books. Given all the various formats in which we now find books, these citations may surprise us!

- Comparing Online Publication Citations: EE1 v. EE2 (Word file)

May 2010 Files

- Death Certificates (Digital Online) (Mills: 9.33) (.XST file)

April 2010 Files

For those of you who would like an explanation of these files, please visit this page: An Explanation of Our *Evidence Explained* Files.

- Death Certificates: Digital Images Online (Word.doc)

- Current Source Types and Source Elements (Excel file)
- Death Certificate (State Level) Source Type (Mills: 9.41) (.XST file)

March 2010 Files

- Analysis of three Mills' cemetery marker source citations (Word.doc)
- Current Source Types and Source Elements (Excel file)
- Three Cemetery Source Types (Mills: 5.13, 5.15, 5.16) (.XST file)

This .xst file includes some changes we talked about during the session, but did not have time to incorporate.

February 2010 Files

- Analysis of Mills' online census image source citation (Word.doc)
- TMG's Source Elements Groups (Excel file)
- New Source Types and Source Elements (Excel file)
- Two Census Source Types (.XST file)

By the End of the Year

- We had created fifteen custom source types – some with alternate formats
- Some of the members had created additional custom source types not yet incorporated with the group's
- And the group wanted to continue with the study of *Evidence Explained*

Discoveries Along the Way

- The "layered citations" required to cite online material use lots of source elements – and the source definition screen allows only 14 fields (plus the Title field).

- How do we deal with a custom source type definition that requires 20 fields?

Word Constants

- Word constants are great for freeing up source element fields – even if they sometimes require the creation of multiple source types for similar record types

Custom Source Type : TVTMG Town/County Registers-Basic (Online FS) 8.36 and QCM 493

is most similar to : Deed (Town or County Level)

Full footnote

<[CITY], ><[COUNTY], ><[STATE], ><[SERIES]><, [CD2]>< ([CD4])><, [CD1]>; [REPOSITORY], [REPOSITORY MEMO2]; digital images,< "[DATABASE],"> [ITAL:]FamilySearch[:ITAL] (https://familysearch.org/ : accessed [CD3])<; browse: [BREADCRUMBS]><; imaged from FHL microfilm.[FILM NUMBER]><, item [ITEM NUMBER]><; [CM]><. [COMMENTS]>.

Short footnote

<[SHORT LOCATION]><, [SERIES]><, [CD2]><; [CM]>.

Bibliography

<[STATE]><. [COUNTY]><. [CITY]><. [SERIES]><, [DATE]>. Digital images.< "[DATABASE]."> [ITAL:]FamilySearch[:ITAL]. https://familysearch.org/< : [YEAR POSTED]>.

Reminder

Digitized images can be cited as if they were the original documents, and then the relevant website information is added to the citation. This is the principle employed when citing FHL microfilm, and it's duplicated here. Compare this to the Town/County Registers-Basic (FHL Microfilm) template. Modeled on EE 8.36, 408-409, QuickCheck Model 493, and sections 10.6, 500; 10.32, 524-525.

- [DATABASE] is the FamilySearch collection title.
- [SHORT LOCATION] is the abbreviated form of the City/County, State; e.g., Berkshire, Vt.
- [BREADCRUMBS] is the series of links followed to find FamilySearch browse-only image sub-collections. Note that the angle bracket (>) must be preceded by the escape character (\); e.g. "Franklin \> Berkshire \> Births, marriages, deaths, town records 1800-1855."
- [DATE] is the range of dates covered by the series; make a note of the range of dates you searched in the Comments.
- [YEAR POSTED] is the year the images were posted online, if you can determine this, or the year/year range the images were viewed.
- [STATE] is the state, written in full .
- [COUNTY] is the county, and the name should include the appropriate identifiers, "County", "Parish", etc.; e.g., Hamilton County or Orleans Parish. This element may be necessary to locate these records in the browse-only collections.
- [CITY] is used for city records or town records in New England.
- [SERIES] is the repository's designation for the collection or the generic title found in the FHL catalog for the record group.
- [ITEM NUMBER] is used if the FHL microfilm roll imaged contains more than one item.
- [FILM NUMBER] is the FHL microfilm roll number found at the beginning of the image series (confirm with online catalog).
- [REPOSITORY] is the office holding/creating the original record, not the building; e.g., Berkhire Town Clerk's Office; Noble County Recorder, etc.
- [REPOSITORY MEMO2] is the shortened version of the location, usually the city only, since the state/county is already named.

[REPOSITORY] as [WEBSITE]

- We could enter websites like *Ancestry* and *FamilySearch* as repositories, entering their URLs in the repository address area
- This would free up source element fields for subscription website source type templates
- It would also speed up data entry
- **This is not ESM approved!**

Expanding Split Memos

- Did you know that memo fields other than tag memos and citation details can be "split"?

- "Splitting" the Repository Memo field made entering Full footnote and Short footnote variations in a repository's location a snap

- It made data entry faster and more consistent

- And it also freed up more source element fields

Repository Definition

Repository # 1:1

Abbreviation : National Archives

Name -ID # : 0:0

Name - Other : National Archives

Place style   U.S. Standard Place

Addressee : National Archives and Records Ad

Detail : PA Ave, N.W.

City : Washington

County :

State : D.C.

Country :

Postal : 20408

Phone :

LatLong :

Temple :

Memo

Hours: M,W, 8:45 am - 5 pm; Sa, 8:45-4:45, T,Th, F, 8:45-9:00||Washington, D.C.||NA--Washington

OK   Cancel   Help

Custom Source Type : TVTMG National Archives Manuscript (Basic Form)

is most similar to : National Archives Manuscript (Basic Form)

Full footnote

<[CD1], ><[CD2]; ><[SUBJECT] ><([LOCATION]) ><[RECORD TYPE] ><[DOCUMENT] ><no. [FILE UNIT NUMBER]><, [DATE]>; <[SUBSERIES], ><[SERIES]; ><[SUBGROUP]; ><[RECORD GROUP], ><Record Group [RG NUMBER], ><[REPOSITORY], ><[REPOSITORY MEMO2]>.

Short footnote

<[CD1], ><[SUBJECT]>< [RECORD TYPE] ><no. [FILE UNIT NUMBER], ><[SERIES], ><RG [RG NUMBER], ><[REPOSITORY MEMO3]>.

Bibliography

<[SERIES]>< ([FINDING AID])><, [SUBSERIES]><. [SUBGROUP]><. [RECORD GROUP]><, Record Group [RG NUMBER]><. [REPOSITORY], ><[REPOSITORY MEMO2]. ><[SUBJECT], ><[RECORD TYPE] ><no. [FILE UNIT NUMBER]>.

Reminder

See EE, QuickCheck Model 5+1
Mills omits [SUBJECT], [RECORD TYPE], and [FILE UNIT NUMBER] from the Bibliography format. This shortens the source list in a publication, but makes it more difficult for you to identify the exact records used. These elements should be removed in a published Bibliography.

- [TITLE] is not used in the output; optionally enter a description.
- [SUBSERIES], [SERIES], and [SUBGROUP] can all be identified through ARC or preliminary inventory.
- [RECORD TYPE] is the overall classification of record, such as homestead file or claim
- [SUBJECT] is the name of person who is the subject of the case file
- [FINDING AID] identifies the preliminary inventory and entry number in which the series is discussed; e.g., (PI 163: entry 220) or ARC identifier (ARC 297652).
- [DATE] of the file is entered, if one is given. Although Mills includes a file date in her file description; very few of her examples show one.
- [LOCATION] is used to uniquely identify the person - where appropriate. Information may be county and state; rank, company, conflict; inclusive dates, etc.
- [SERIES] can be identified through ARC or preliminary inventory.
- [RECORD GROUP] can include both title and record group number, but since Mills has several template variations that omit the title in the Short Footnote, this is usually title only. If you enter [RECORD GROUP] as "Title, Record Group No.," don't bother with the [RG NUMBER] element.
- [SUBGROUP] can be identified through ARC or preliminary inventory.
- [DOCUMENT], where necessary, this identifies the type of certificate: e.g., final certificate, application, etc.

[FCAP:] [:FCAP]

- This command capitalizes the first letter of each word within its surroundings
- This could help with the problem of words that should be capitalized in the bibliography, but lower case in the footnotes
- However, it's best for single words only

Custom Source Type : TVTMG Artifact (Privately owned) QCM 105

is most similar to : Bible Record

Full footnote

<[CD1]><, [CD2], in >[CREATOR]< [RECORD TYPE]><, [INCLUSIVE DATES]><; [DESCRIPTION] >held by <[REPOSITORY], ><[REPOSITORY MEMO2], ><[YEAR OWNED]><; [CM]><. [COMMENTS]>.

Short footnote

<[CD1], ><<[SF GIVEN NAME] >[CREATOR]<, [RECORD TYPE]><; [CM]>.

Bibliography

[CREATOR].< [RECORD TYPE]><, [INCLUSIVE DATES]. > <[FCAP:][DESCRIPTION][:FCAP] >held by <[REPOSITORY], ><[REPOSITORY MEMO2].>< [YEAR OWNED]>.

Reminder

This template is based on EE QuickCheck Model 105 and sections 3.24-3.25. Examples of privately owned artifacts are a scrapbook, a photograph album, a photograph, a quilt, an engraved locket, etc.

- [TITLE] is not used in the output; optionally enter a description.
- [SF GIVEN NAME, is the ?rst name of the creator and is used in those instances when the creator's surname is not enough to uniquely identify that creator in the short footnote.
- [RECORD TYPE] is the type of artifact and it is capitalized; e.g., "Scrapbook," "Baby Quilt," etc. If the artifact has an exact title, enter this in quotation marks, "Our Baby's First Seven Years," for example.
- [CREATOR] is the creator of the artifact; name is entered last name, first name; if unsure about the creator, enter a probable identity and include your reasoning in the Comments section.
- [INCLUSIVE DATES] is the range of years the creation of the artifact took; this is frequently a circa range, but may be an exact year.
- [DESCRIPTION] identifies the type of record: original, photocopy, photograph, etc. A typical entry might be "original privately," "photocopy privately," etc.
- [YEAR OWNED] is the most recent year the most recent owner was known to hold the source.

- [COMMENTS] is used for detailed information about the provenance of the artifact, an analysis of that artifact, and any other details relevant to conclusions made based on this artifact. (Located in the Supplemental Tab)

- [REPOSITORY] is the name of the individual holding the artifact.
- [REPOSITORY MEMO2] is used for the owner's location information; standard entry is "[SCAP:][address for private use][:SCAP], City, State," allowing the researcher to keep owner information private while retaining contact information in the database.

Summary of Discoveries

Word constants	Releases many fields; makes updating words and formats easy	Requires different templates for similar records
[REPOSITORY] for [WEBSITE]	Frees two fields	Not ESM approved; may not migrate well to other programs
Split Repository Memo fields	Frees two fields; makes updating easy	Does not migrate to other programs
[FCAP:][:FCAP]	Of limited use	Probably does not migrate to other programs

"I have an idea," one of the members said at the May meeting. "Why don't we create a booklet of templates?"

A Three-Person Committee Was Formed

To oversee the production of a source type template "booklet"

Fielding Suggestions

- "The booklet should lie flat, so it's easier to use while entering sources"
- "We need a picture of the source definition screen for each template"
- "We'd like to see the full footnote, short footnote, and bibliography output – *with examples* – as we look at the example source definition screen"
- "Can you print the reminders, too?"

TVTMG Census (US digital online) QCM 240

FULL FOOTNOTE:

[CENSUS ID], [COUNTY], [STATE]<, [SCHEDULE]>, [CD2], [CD1]; digital image, [ITAL:][REPOSITORY][:ITAL] ([REPOSITORY ADDRESS] : accessed [CD3]); citing NARA microfilm publication [FILM NUMBER], roll [ROLL NUMBER]<; [CM]>.

1900 U.S. census, Tazewell County, Virginia, population schedule, Tazewell Mag. District, Tazewell town, ED 99, p. 172 (stamped), sheet 11A, dwell. 180, fam. 188, Robert M. Baldwin household; digital image, *Ancestry.com* (http://www.ancestry.com : accessed 15 May 2010); citing NARA microfilm publication T623, roll 1730.

SHORT FOOTNOTE:

[CENSUS ID], [SHORT LOCATION], [CD2], [CD1]<; [CM]>.

1900 U.S. census, Tazewell Co., Va., pop. sch., Tazewell Mag. District, Tazewell town, ED 99, p. 172 (stamped), sheet 11A, dwell. 180, fam. 188, Robert M. Baldwin household.

BIBLIOGRAPHY:

[STATE]. [COUNTY]. [CENSUS ID]<, [SCHEDULE]>. Digital images. [ITAL:][REPOSITORY][:ITAL]. [REPOSITORY ADDRESS] : [YEAR].

Virginia. Tazewell County. 1900 U.S. census, population schedule. Digital images. *Ancestry.com*. http://www.ancestry.com : 2004.

REMINDER:

Duplicates Mills, *EE*, QuickCheck Model 240.

- [TITLE] is not used in the output; optionally enter a description.
- [SHORT LOCATION] includes the abbreviated county, state, and schedule, as appropriate; example: Bradford Co., Pa., pop. sch. Although the *Chicago Manual of Style* now allows postal abbreviations for the state, Mills doesn't. Use the standard state abbreviations; e.g., Minn., not MN; Ohio, not OH; Pa., not PA.
- [SCHEDULE] examples: population schedule, slave schedule, etc.
- [YEAR] is the year the images were published on line.
- [STATE] is the state, spelled out.
- [COUNTY] is the county including "County", "Parish", etc.; e.g., Hamilton County or Orleans Parish.
- [CENSUS ID] example: 1850 U.S. census, etc.
- [ROLL NUMBER] is the number following the film number, for example 1730 from (T623_1730).
- [FILM NUMBER] examples: T9, M593, T623, etc.

- [REPOSITORY] is the title of the website.
- [REPOSITORY ADDRESS] is the main website URL, not the address for the image viewed.

EXAMPLE OF THE SOURCE DEFINITION SCREEN

Possible template variation: [WEBSITE TITLE] could be substituted for [REPOSITORY] and [URLX] could be substituted for [REPOSITORY ADDRESS], or the template could be amended to include both options. Edit as appropriate. Note that the standard Source Element, [URL], is part of the [SECOND LOCATION] Source Element Group. That conflicts with [COUNTY] in this template, so the alternate Source Element, [URLX], a custom element in the [PUBLISHER LOCATION] Source Element Group, is needed.

- [CD1] is the name of the person of interest. This is usually the name of the head of household, as entered in the census, followed by the word "household." You can omit "household" if it's made clear in the text. If the reference is to someone in the household with a different surname, enter as, "Frank Alexander in the Annie E. Fugate household."
- [CD2] includes the following, as appropriate, in this order: Civil division, Page ID, Enumeration district, [ED page ID], Household ID [dwell. and fam. number for 1850 and later; line number for 1790-1840]. Abbreviate dwell. and fam., then correct first reference note to dwelling and family.
- [CD3] is the date you viewed the image. These templates reserve [CD3] for the date any source is viewed.
- [CM] is used for analytical and explanatory notes about this source as it pertains to the specific event being cited.

Moving from Haphazard to Consistent

- Make source element assignments more consistent
- Rewrite reminders for consistency and completeness
- Recognize that users will not read the book cover to cover, so treat each source type as a unique entity
- **Find something to fill all the blank spots created by those complicated source types that took up more than two pages!**

Sidebars

- Highlight the group's discussions

- Provide a few tips and tricks

- Offer alternative ideas for consideration

- And fill those blank pages ☺

Sidebar

Publications and the Book Basic Format

Most *publications* can be cited by using the "Book: Basic Format" model (*EE*, 646 and 662-665) or the "Book: Chapter" model (*EE*, 647 and 701-703). Publications can be broadly defined as any work created for public view; for example, a book, a webpage, a database, a CD, and a map are all "publications." All publications are *derivative* works.

Templates that are based on the "Book: Basic Format" model include the **TVTMG Book Basic**, page 14, **TVTMG Book Basic Online**, page 16, **TVTMG Book Electronic Publication**, page 18, and **TVTMG City Directory Online**, page 34.

Templates that are based on the "Book: Chapter" model include **TVTMG Article Journal**, page 8, **TVTMG Government Docs**, page 58, **TVTMG Online Database QS Ancestry Basic**, page 120, **TVTMG Online DATABASE/Images**, page 128, **TVTMG Passenger Lists (online)**, page 140, and **TVTMG Website (Chapter)**, page 162. If none of these templates yield the desired output, use the closest as a starting point and create your own template.

The Dreaded Double Period

Take a look at this *unedited* bibliography output produced by the **TVTMG Article (Journal) (online images)**. The *edited* version appears on page 8.

Baldwin, Charles C.. "Notes on the Ancestry of Sylvester Baldwin." *New England Historical and Genealogical Register* 26 (July 1872): 295-303. Digital images. New England Historic Genealogical Society. *American Ancestors*. http://www.americanancestors.org/ : 2011.

Notice the double period following the author's name. Templates are great for improving consistency and thoroughness when entering information, but sometimes templates can introduce problems. This double period appears most often in TMG's bibliography output where the period following the middle initial in an author's name immediately precedes the period ending the [AUTHOR] element in the template.

We've been unable to devise a template design that avoids this problem. When publishing a bibliography, be aware that this problem exists. Use your word processor's "find and replace" function to eliminate these double periods. That's the action we have taken throughout this book.

We Needed More Templates

- Template creation had been based on what some member needed for his or her research
- We were missing some important record types, and they needed to be represented in the "booklet"
- Some templates were ultra-specific or redundant, so they needed to be deleted
- Finally, 52 templates were ready

We Needed More Instruction

- Our 52 templates won't meet all research needs, so readers would find it helpful to learn how to create new custom source type templates

Creating Custom Source Type Templates

Many sources can be cited using the basic templates in this booklet. When your research takes you to an unusual archive, a new country, or deep into new Source Types, it may become necessary, or desirable, to create new templates to cite those new sources more easily.

- Start with the template that most closely matches the new Source Type and make a copy of that template.
- Change the name of the Source Type.
- Add a new source to the Master Source List using the template and examine the results.
- Do any Source Element names need to be changed to more easily recognize the desired data input? If so, change the names – hopefully to a Source Element that already exists.
- Do any word constants need to be changed or added? If so, make the changes in the Source Type template.
- Compare the results to the relevant QuickCheck Model or section in *Evidence Explained*. Is anything missing or out of place? If so, make the changes in the Source Type template.
- When the template is satisfactory, write a reminder about each Source Element. Don't forget to include explanations of the Citation Detail contents. It's also helpful to include references to your model, whether found in *Evidence Explained*, a Mills "QuickSheet," or another style guide.

The creation of five Source Type templates is illustrated here.

1. The first shows the transformation of the **Online Database (QS Ancestry Basic)** template into a template one can use for databases available on *FamilySearch*. Mills added examples of *FamilySearch* templates to the 2nd edition of *Evidence Explained*, so compare these templates to relevant sections in that edition.
2. The second shows the transformation of the **TVTMGS Online DATABASE/Images (Patents 11.51)** template into an alternative template one can use for digital images available on *FamilySearch*.
3. The third shows the transformation of the **Death Certificates (State Level, FHL microfilm)** into one suitable for digital images available on *FamilySearch*.
4. The fourth creates a template suitable for the browse-only image collections available on *FamilySearch*.
5. The fifth template is one that transforms the **Census (US digital online)** template into one that could be used in citing digital images of UK censuses.
6. Because some UK censuses are still more readily available on microfilm, an FHL microfilm version of the template was created.

Creating a Template for *FamilySearch* Databases

FamilySearch records come in many forms: databases, digital image collections formed from multiple record groups, digital images from a single group of records, and databases that link to images housed by another website. When citing a record from a *FamilySearch* database, test the citation with the simplest of the online database templates, the **Online Database (QS Ancestry Basic)**.

FULL FOOTNOTE:

<[COMPILER], ><"[DATABASE]," >database, <[SECOND AUTHOR], > <[ITAL:][WEBSITE TITLE][:ITAL] ><[ITAL:][REPOSITORY][:ITAL] > (<[URL]><[REPOSITORY ADDRESS]>< : accessed [CD3]>)<, [CD1]><; [CM]><; citing [COMMENTS]><; specifically citing [CD4]>.

The Church of Jesus Christ of Latter-Day Saints, "Nebraska Marriages, 1855-1995," database, *FamilySearch* (https://www.familysearch.org/ : accessed 18 December 2011), Ernest Vienop - Lillian Dolittle entry (1912); citing Jefferson County, Nebraska, marriage records, 1864-1994; specifically citing FHL microfilm 1,986,437.

SHORT FOOTNOTE:

<[COMPILER], ><"[DATABASE]," ><[ITAL:][REPOSITORY][:ITAL], ><[CD2]> <; [CM]>.

Church of Jesus Christ of Latter-Day Saints, "Nebraska Marriages, 1855-1995," *FamilySearch*, Vienop-Dolittle entry (1912).

BIBLIOGRAPHY:

<[COMPILER]. ><"[DATABASE]." >Database. <[SECOND AUTHOR]> <. [ITAL:][WEBSITE TITLE][:ITAL]. ><[ITAL:][REPOSITORY][:ITAL]. > <[URL]><[REPOSITORY ADDRESS]>< : [YEAR POSTED].>

Church of Jesus Christ of Latter-Day Saints, The. "Nebraska Marriages, 1855-1995." Database. *FamilySearch*. https://www.familysearch.org/ : 2011.

TEMPLATE ANALYSIS:

The [COMMENTS] field in the Full Footnote is used to describe the "source of this source." This database is taken from many different records, so including the title of the microfilm from which this information came is not exactly correct in this field. It's not the "source of this source," i.e., the source of the database, but the cited microfilm roll *is* the source of the item – and this information is essential in evaluating the evidence. This template would be more accurate if the microfilm roll and its corresponding catalog title were both identified as the "source of the item." The [COMMENTS] field could still be used to describe the "source of this source." "FHL microfilm" can be added as a word constant.

This database could be "lumped" under the database title and the specific catalog title moved to a Citation Detail, or it could be "split" and the specific catalog title made part of the template. Making the catalog title the source unit provides efficient search options and streamlines the data entry.

- Our own users weren't familiar with importing source type templates, so the "booklet" needed to include these instructions

Importing Custom Source Type Templates

Before adding or installing new custom Source Type templates, your TMG database must be set to use the Custom Source category. To verify this, access your preferences via the menu sequence: **File** > **Preferences** > **Current Project Options** > **Other**. The first line, "Source categories," must be set to "Custom." If not, consult TMG's Help file, "Changing Source Categories and Initializing or Restoring Defaults," for instructions. Read it carefully!

IMPORTANT: **Before making any changes to your current TMG database, make a backup copy!**

BEFORE INSTALLING TVTMG CUSTOM SOURCE TYPE TEMPLATES

If you have not created any custom source elements, installing any or all TVTMG Custom Source Type templates should create no problems. All necessary source elements will be added as the templates are installed.

If you *have* created custom source elements, it's possible that you have created elements that are identical in name to those used in these TVTMG Custom Source Types, but differ in the assigned Source Element Group. Before installing a TVTMG Custom Source Type template, compare the template's list of custom source elements to those you have created. If an element name is duplicated, but the assigned source element group is different, TMG will install the TVTMG Custom Source Type template and create a custom source element whose name differs by the appending of a numeral; e.g., Website and Website1. After the template is installed, you may choose to change the source element's name. You should verify that the new Source Element name is not already used or an existing name is in the correct Source Element Group. Changing its assigned Source Element Group is *not* recommended as it may create other conflicts.

DOWNLOADING TVTMG CUSTOM SOURCE TYPE TEMPLATES

These templates are available on the web at http://home.comcast.net/~zacathan/tvtmg_templates/ in two forms. You can select the entire collection, "tvtmg_source_types_2012.xst" or individual templates contained in the file "TVTMG_Source_Type_Templates.zip." If you have already created your own custom source types and custom source elements, it is recommended that you choose and install selected templates one by one, rather than installing the complete set.

The individual templates are contained in a .zip file "TVTMG_Source_Type _Templates.zip." When you extract this file it creates a folder "TVTMG_Source_Type _Templates." This folder contains the 58 individual template files.

When you download the template file or files, note where the files are saved. Frequently a file is downloaded into your Downloads folder. If you are running Microsoft XP the Downloads folder is located in the "My Documents" folder. In Microsoft 7 and Vista it can be found by clicking the Start button, and then clicking your user name at the top of the Start menu's right column.

TMG looks for import files in its Export folder. If you move the template file into TMG's Export folder, then TMG will find it. This folder is located in "My Documents\The Master Genealogist v8\Export."

If you are going to import individual templates, extract the zip file in the Export folder so that the sub folder "TVTMG_Source_Type_Templates" is created there.

Once you have saved the template file or files in the TMG Export folder:
1. Open TMG and select your database.
2. In the Tools menu, select "Source Types." The Source Types window will appear.
3. On the right side click on **Import**.
4. If you wish to import an individual template:
    a. Double click on the folder TVTMG_Source_Type_Templates
    b. Select the template desired and click **Open**.
5. If you wish to import all the templates ...
    a. Select the "tvtmg_source_types_2012.xst" file and click **Open**.
6. You will be asked if you want to add a prefix. Since all the TVTMG templates have the TVTMG prefix an additional prefix is not needed. Leave it blank.
7. Click "**OK**."
8. You will be asked: "What would you like to do with incoming source types that have the same name as an existing one?"
9. Select "Overwrite the original with the imported one."
10. Click **Continue**.
11. The templates will be imported.

- What about readers who had already created custom source types and source elements? How could they find and avoid conflicts?

Converting Existing Master Sources

No information is lost when the Source Type used to define a Master Source is changed from one type to another. Manual editing may be necessary if information is missing from the Source Definition, the Repository, or the Citation Detail, or if that information differs in structure from the information as defined in the new Source Type.

REPORTS

There are two reports that will be helpful when converting existing Master Sources to the TVTMG source types.

1. List of Master Sources with Source Types

A "List of Sources" report can be used to identify existing Master Sources and the Source Type templates used to create them.

- From the menu select **Reports > List of > Sources**.
- In Subject(s) of the report: select **All Sources**.
- In Report Destination: choose "Save to:" and select a file type.
- In **Options > General** select **Columnar list type**.
- In **Options > Output Columns** set the output as is shown below.

The resulting report is sorted by Source Type, so any necessary editing of Master Sources can be done in an organized manner.

2. Citation Detail Report

The citation detail report contains the Source Number, Master Source, the primary subject's name and the Source Type template used.

- From the menu select **Reports > List of > Citations**.
- Select **All citations** or a filter to select the Master Source desired.
- In Report Destination: choose "Save to:" and select a file type.
- In **Options > General** select **Columnar List type**.
- In **Options > Output Columns** set the output as shown below.

The resulting report will allow you to quickly identify any Citation Details that might need editing.

CONVERTING A MASTER SOURCE TO USE A TVTMG TEMPLATE

The first step in a conversion is to compare the old and new source types, identifying any differences in source elements, repository and citation detail. The reports described above will be helpful.

Source Element

If you have created any custom source elements, verify that your custom elements and those of the same name used in these TVTMG templates are in the same Source Element group. If not, source elements of the same name, but with an added increment number, will be created; e.g. Database and Database1.

Repository

A repository could be used in either, both, or neither of the old or the TVTMG templates. If both reference a repository you should check the Repository Memo as TVTMG templates frequently use Repository Memo2.

If the old template does not use a repository you will need to add one if the TVTMG template uses one. A few TVTMG templates have both repository and a website and URL in the sentence structure. Only one should be used.

- For users having difficulty understanding the relationship among the components of a source we added a "Hierarchy of Source Elements" tutorial

Hierarchy of Source Elements

- The **Repository Definition Screen** stores source location information and can be linked (referenced) to many Master Sources. Changing information in the Repository Definition Screen changes that information in the output of all sources referencing that Repository.
- The **Master Source Type** is the template that defines the Full Footnote, Short Footnote, and Bibliography output (sentence structure) of one or more Master Sources.
- A **Master Source** is composed of elements whose values are defined in the **Source Definition Screen**. It can be linked (referenced) to many Event Tags. It can also be linked (referenced) to multiple Repositories, but only the *primary* Repository is used in the citation output. Changing information in the Source Definition Screen changes that information in the citation output of all events referencing that Master Source – but it doesn't affect a Repository's information.
- An **Event Tag** citation can be linked (referenced) to many sources via the **Tag Entry** screen. Information relating to this citation is entered in the **Citation Detail** window found in the **Citation Screen**. Changing information in an Event Tag's Citation Detail window changes the citation to that one event only.

Repository Definition Screen

[REPOSITORY]

[REPOSITORY ADDRESS]

[REPOSITORY MEMO]

Sources are linked to a Repository via the Master Source Attachment Tab. This tab contains the element: [REPOSITORY REFERENCE].

Source Definition Screen

General Tab: Most Source Elements
Supplemental Tab: [MEMO]
Attachments Tab:
[REPOSITORY RFERENCE]

General Tab: Most Source Elements
Supplemental Tab: [MEMO]
Attachments Tab:
[REPOSITORY RFERENCE]

Events are linked to Sources via the Tag Entry Screen's Citation Detail Tab.

Citation Screen

[CITATION DETAIL]
[CITATION MEMO]
[CITATION REFERENCE]

[CITATION DETAIL]
[CITATION MEMO]
[CITATION REFERENCE]

[CITATION DETAIL]
[CITATION MEMO]
[CITATION REFERENCE]

Robert Moore Baldwin Death Event: Desired Citation

1. West Virginia State Department of Health, death certificate no. 7184 (1946), Robert Moore Baldwin; Division of Vital Statistics, Charleston.

Full Footnote Template

<[JURISDICTION] ><[AGENCY], ><[RECORD TYPE]>< no. [CD2] ><([CD4])>
<, [CD1]><; [REPOSITORY]>< [REPOSITORY MEMO2]><; [CM]>.

Repository Definition Screen Contents

Division of Vital Statistics
350 Capitol St., Room 165, Charleston, WV 25301
||Charleston

Source Definition

General | Supplemental | Attachments | Output form

Source #: 42

Default surety (0-3): 3

Active?: ⦿Yes ○No   Category : Custom

Abbreviation: WV Death Certificates

Source type | EE Death Certificates (State Level) 9.41

title | West Virginia Death Certificates

< Record Type > | death certificate

< Agency > | State Department of Health

< Jurisdiction > | West Virginia

< Series > | Death certificates

Source Definition Screen

OK | Cancel | Help

Tag Entry Screen: Citation Detail Contents

Robert Moore Baldwin||7184|| ||1946

Adding Finishing Touches

- A glossary of terms
- A table of contents – including a separate table for the sidebars
- A list of *all* source elements used in the templates, including each element's group assignment, field location, and any unusual action, such as last name first
- An index to custom source elements
- An introduction and disclaimer
- A title page and cover design

Appendix A – Source Elements

Source Element	Source Element Group	Field Location	Custom?	Notes
Address	Location	General Tab		
Agency	Author	General Tab		LNF*
Agency Location	Publisher Location	General Tab		
Applicant	Author	General Tab	Custom	LNF*
Application Number	Short Subtitle	General Tab	Custom	
Applied To	Second Person	General Tab		LNF*
Archive Number	Volumes	General Tab	Custom	
Article Title	Subtitle	General Tab		
Artifact Number	Record Number	General Tab	Custom	**
Artifact Title	Subtitle	General Tab	Custom	**
Author	Author	General Tab		LNF*
Author Address	Location	General Tab		
Author E-mail	Second Location	General Tab		
Author Role	Editor	General Tab	Custom	
Bible Title	Title	General Tab		
Book Title	Title	General Tab		
Breadcrumbs	Record Type	General Tab	Custom	
Call Number	Record Number	General Tab		
Case Name	Record Number	General Tab	Custom	
CD	Citation Detail	Citation Screen		1 to 9
Cemetery	Title	General Tab	Custom	
Census ID	Edition	General Tab	Custom	
Chapter Title	Subtitle	General Tab		
Church	Author	General Tab	Custom	LNF*
City	Publisher	General Tab	Custom	
CM	Citation Memo	Citation Screen		1 to 9
Collection	Edition	General Tab	Custom	
Collection Number	Pages	General Tab	Custom	
Comments	Comments	Supplemental Tab		1 to 9
Compilation Title	Title	General Tab		
Compile Date	Date	General Tab		
Compiler	Compiler	General Tab		LNF*
Compiler Address	Location	General Tab		
Congress	Edition	General Tab	Custom	
Country	Editor	General Tab	Custom	
County	Second Location	General Tab	Custom	
Creator	Author	General Tab	Custom	LNF*
Cref	Citation Reference	Citation Screen		
Database	Title	General Tab	Custom	
Date	Date	General Tab		
Dependent	Second Person	General Tab	Custom	LNF*
Description	Series	General Tab	Custom	
Directions	Repository Memo	Repository Definition	Custom	1 to 9 **
Document	Pages	General Tab		
Source Element	**Source Element Group**	**Field Location**	**Custom?**	**Notes**

Document Number	Record Number	General Tab	Custom	
E-Address	Publisher Location	General Tab	Custom	
Edition	Edition	General Tab		
Editor	Editor	General Tab		
Essay Title	Subtitle	General Tab		
Family Info	Subject	General Tab		LNF*
File Date	Date	General Tab		
File Name	File Reference	General Tab		
File Number	Record Number	General Tab		
File Reference	File Reference	General Tab		
File Unit Number	Film Number	General Tab	Custom	
Film	Film Number	General Tab		
Film Number	Film Number	General Tab		
Film Range	Second Date	General Tab	Custom	
Finding Aid	Compiler	General Tab	Custom	LNF*
First Party	Author	General Tab		LNF*
Folder Label	Volumes	General Tab	Custom	
Format	Edition	General Tab	Custom	
Generic Subject	Subtitle	General Tab	Custom	
Household	Subject	General Tab		LNF*
Inclusive Dates	Second Date	General Tab	Custom	
Informant	Author	General Tab		LNF*
Informant Address	Location	General Tab		
Interview Date	Date	General Tab		
Interviewer	Second Person	General Tab		LNF*
Item Date	Second Date	General Tab	Custom	**
Item ID	Pages	General Tab	Custom	
Item Number	Record Number	General Tab	Custom	
Item Title	Subtitle	General Tab	Custom	
Journal Title	Title	General Tab		
Jurisdiction	Location	General Tab		
Listserve	Location	General Tab		
Location	Location	General Tab		
M	Comments	Supplemental Tab		1 to 9
Manuscript Info	Record Number	General Tab		
Memo	Comments	Supplemental Tab		1 to 9
Military Group	Second Location	General Tab	Custom	
Name of Person	Subject	General Tab		LNF*
Newspaper Title	Title	General Tab		
Number	Record Number	General Tab		
Organization	Second Person	General Tab	Custom	LNF*
Original Date	Second Date	General Tab		
Original Owner	Author	General Tab	Custom	LNF*
Page	Pages	General Tab		
Pages	Pages	General Tab		
Patriot	Subject	General Tab	Custom	LNF*
Pension Number	Version	General Tab	Custom	
Pension Type	Record Type	General Tab	Custom	

Editing

- Since the "booklet" comprised 209 pages, it was now officially a book

- It took 22 tries to come up with the cover page design and the book itself went through 28 editing cycles

- We *still* had an error that slipped through, found by one of the very first purchasers, and necessitating an immediate corrected edition ☹

Repository Definition

Repository # 15

Abbreviation : Johnston Collection

Name -ID # : 0

Name - Other : Susan Johnston

Place style   U.S. Standard Place

Addressee		Country	
Detail		Postal	
City		Phone	
County		LatLong	
State		Temple	

Memo

|||[ADDRESS FOR PRIVATE USE], Fremont, California|||[(E-ADDRESS) & STREET ADDRESS FOR PRIVATE USE], Fremont, California

OK   Cancel   Help

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