

Source Citation Overview – Ancestral Quest

Documentation of your information is very important. Ancestral Quest provides two general methods for handling this task. One is by using the Notes capabilities. This is very straight-forward, but lacks finesse and flexibility. The other method is to use Sources.

The Basic Process

Some sources will document only a single individual, marriage, or event. For such sources, you simply create the source record, which allows you to enter information such as the title, author, repository, and notes about the source. Once created, you then cite this source for the event or record that it documents. Typically, the steps to accomplish this are:

- 1) Create the record (marriage or individual).
- 2) Enter the information on the various events surrounding this record.
- 3) Click on the 'S' button to the right of the event to start the source citing procedure.
- 4) You will either see the Source Citation screen or the Select Source screen, depending on your preferences. If you see the Source Citation screen, select the "Create" button to create this new source. If you see the Select Source screen at this point, select the "Add" button to add a new source.
- 5) Enter the information for the source, creating a source record.
- 6) If you saw the Source Citation screen in step 4, you will now be back at the Source Citation screen, ready to enter any citation details. If there are none, simply click on the OK button to complete the process. If you saw the Select Source screen in step 4, you have one more step – you must now select the newly added source on the list of sources, and click the "Select" button to select this source.

That's it! For the simple situation wherein a source documents only a single item, you are finished.

However, many sources have information on several items. Ancestral Quest lets you cite this source for each of these items. For example, a typical birth certificate will not only document the birth of the child, it may also give some information on the father and the mother.

Case Studies

Let's walk through two case studies to help you fully understand source documentation in Ancestral Quest.

1. The Birth Certificate

For the birth certificate in this example, we will say that it gives the name, date, and place of the birth of the child. It also gives the marriage date of the parents, and it gives the birth date of both the father and the mother.

Let's say that you have already entered the records for the father and mother, including their marriage. Now you are entering the record for the child and you decide to document the events mentioned in this certificate.

a. Follow the steps above for the Basic Process to enter the source record for the birth certificate, using the 'S' button next to the birth event for this child. You have now created this source, and cited it for documentation of this birth event. If you have a copy of the certificate, you might want to scan it in and attach the image to the source record, you will be able to view it on screen and on reports.

b. Now you realize that you can attach this source record to the father's record, mother's record and the marriage record of the parent. So you now select any of these records – for this example, we will select the father's record.

c. Open the father's record. Since the birth certificate references the birth date of the father, click on the 'S' button next to the birth event. Because this source already exists, you will follow different steps than shown in the Basic process.

d. You will see either the Source Citation screen or the Select Source screen, depending on your preference setting. If you see the Source Citation screen, click on the "Select" button to get to the Select Source screen. Now select this birth certificate record from the list of existing sources. (Remember, you created this source record in step 'a' above.)

e. NOTE: Because you have already cited this source (in step (a) above), you will now see the Select Citation screen. This screen will allow you to connect this birth certificate source to this father's birth event by either creating a new citation, or by using the existing citation. (Note: If you are using the Personal Ancestral File (.paf) database, you will not be given this option. A new citation will be created, and this screen will not appear.) Click on your Help file to see why you might want to use an existing citation vs. creating a new citation. For purposes of this case study, we want to use the existing citation, so make sure it is highlighted, and click the "Select From List" button.

f. You will now be in the Source Citation screen. All the citation detail from step (a) will be shown. (If you are using the Personal Ancestral File (.paf) database, you cannot connect multiple events to a citation – you must click OK on this screen to complete this process, then repeat steps (b) through (f) for the other two events. You will not have options to proceed to step (g) at this point.) For the Ancestral Quest (.aq) database, you will have an option to specify that this birth certificate only documents the date of the Father's birth, so select the "Date" option under "Apply to" .

g. For an Ancestral Quest (.aq) database, you have now connected two events to this source citation – the birth event of the child and the birth event of the father. Now you are ready to connect the birth event of the mother and the marriage event to this citation.

g. Click on the "Attach to Other Events" button to start this process. You will be brought to the Citation Links screen. Notice that for this citation, two events are already listed – the birth of both the child and the father.

h. You now want to add the mother's birth event to this source citation. Use the "Search" button to locate the Mother's record.

i. Now notice that all the events associated with the mother are listed at the bottom of the screen. Select the Birth event, and select "Date" under "Apply to" to indicate that the birth certificate only documents the birth date of the mother. Now click the "Attach" button.

j. Notice that the mother's birth event is now listed with the child's birth and the father's birth.

k. To connect this birth certificate to the marriage date, repeat steps (h) and (i) to locate the marriage record and attach the source citation to it.

l. You're done! Click the "Close" button to exit this screen, and the "OK" button to exit the Source Citation screen.

Next time you print a Family Group Record with sources, you'll see that all these 4 events refer to this birth certificate as a source document. If you are using the Personal Ancestral File (.paf) database, you will see 4 different footnote numbers, and see the birth certificate source repeated 4 times. If you are using the Ancestral Quest (.aq) database, you will see one footnote number beside each of these 4 events, and you will see the birth certificate source listed just once in the sources section.

2. The Historical Book

Let's call this book "Founders of Bloomington County". It has information on hundreds of early settlers in a historical work of several hundred pages. In it, you find information on your grandfather on pages 52 and 218, on your grandmother on pages 86 and 218, and on your mother on page 218.

If you have read through the case study for the Birth Certificate, you may have noticed that there are two techniques you can use in attaching multiple events to a single source citation within the Ancestral Quest (.aq) database: 1) you can first enter all the records and events, then you can create the source and use the "Attach to Other Events" button to quickly attach all the already entered events to this source citation; or 2) you can attach the events to the source citation as you enter the events, by using the 'S' button next to the event and selecting this source citation. (NOTE: if you are using the Personal Ancestral File (.paf) database, option 1 is not available, and option 2 will create new citations for each event.) For purposes of this case study, we will use option 2, as it is a little more difficult and requires more tutoring. We will also presume that you have read the Birth Certificate example, as we will skip some of the tedious details you should now be familiar with, and we will presume that you are using the Ancestral Quest (.aq) database, with the additional capabilities it provides.

a) Using page 52 of the book, enter your grandfather's record and information.

b) Using the Basic Process listed above, create the source record for this "Founders of Bloomington County" book and attach a source citation to the information on your grandfather. If more than one event is documented, use the "Attach to Other Events" button to attach this source citation to the other events. During step 6 of the Basic Process, enter the page number of the book (52) in the Citation detail.

You may want to scan in this page and attach the image to this citation, and/or you may want to type in the actual text from the book that relates to your grandfather.

c) Using page 86 of the book, enter information on grandmother.

d) To document (source) the information on your grandmother, use the 'S' button next to one of the events that were documented and select this book from the list of sources. You will be shown the Select Citation screen, with the citation listed for page 52. This is a new citation! Click the "Create New Citation" button.

e) You will now be on the Source Citation screen. Enter the page number (86), and attach the image and or type in the text relating to your grandmother. If other events are associated with this page and text, use the "Attach to Other Events" button to attach those events. Notice that the details of this citation (page # and text) are different from that of page 52 in steps (a-b), so you want to create a different citation!

f) When you get to page 218 of the book you will find information on the marriage of your grandparents and the birth of your mother. This is yet another citation, but this one will list information on events of two different entities – your mother and the marriage of your grandparents. Let's start by editing the marriage record of your grandparents.

g) Let's try something a little different here. Rather than click on the "S" next to the marriage event, let's go into Notes/Sources. Click on the "Marriage Source" tab of the Documentation screen. Notice that any other sources you may have entered are already listed.

h) Make sure the "Show Tools" box is checked, so you can make changes to the list of sources for this marriage.

i) Click the "Add" button to start the process of adding this new source.

j) From the list of events, select the "Marriage Event" and click "Continue".

k) Now select this book from the list of sources. When you come to the Select Citation screen, you will note that a citation for page 218 is not already listed, so click on "Create New Citation" .

l) You will now be on the Source Citation screen. Enter page 218 into the Page field, and enter any text or image to the citation as you wish. When you click on OK, you will note that the Documentation screen now shows this new piece of documentation.

m) Also on page 218 is information on your mother. So exit the marriage screens, and add your mother's record.

n) Now click on the 'S' next to her birth event to start the process of documenting this birth event.

o) Select this book from the list of citations. When you get to the Select Citation screen, you must make a decision. 1) Even though the page number is the same as for the marriage event, you want to enter

different text from the page, so this must be a new citation. 2) You don't intend to specify any different information on the details of this citation from the existing citation of page 218, so select the existing citation for page 218 and click " Select From List" .

p) If you selected the existing citation for page 218 in step (o), you are done. If not, you need to enter any citation detail in the Source Citation screen.

That's it! You're done! Depending on how you handled the choice in step (o), you have created a source for the book, and 3 or 4 different citations for different pieces of information inside that book. On a Family Group Sheet for this family, you will see 3 or 4 different sources listed. If you created a shortened version of the title (such as "Founders") and author for this book, the 2nd, 3rd (and 4th) appearances of this source will use the shortened references to the book, while giving the differing details of the citation.

Using Memorized Citations

How to Access: This screen is available from many screens that allow you to work with source citations.

Purpose: This is a quick way to re-use a source citation that has recently been used.

How to Use: Depending on how you have set your preferences, the "Use Memorized" button will behave in one of two ways:

- 1) It will simply re-use the last memorized citation.
- 2) It will bring up a screen that will let you select a citation from one of three sources.

In this latter mode, you will see a screen listing the 10 or so most recently memorized citations. Below this, you will see a list of the 10 or so most recently used citations, regardless of whether you memorized them or not.

You can highlight one of the citations shown, view the details in the window to the right to verify whether it is the citation you want to use, and then click on the "Use" button to re-use this citations.

Or, you have yet another option: you can click on the "Others" button to view a list of all the sources in the database and select a citation of one of these sources. In this mode, when you highlight a source on the list and click on the "Select" button, you will be shown a list of citations to choose from.

To adjust this preference, use the checkbox on the bottom of this screen, and the Miscellaneous tab of the Preferences screen. If you see this screen, you will also see a checkbox at the bottom instructing the program to never show this screen to you again. If you check that box, the only way to see this screen with its accompanying options is to go into the Preferences screen, under the Miscellaneous tab, and turn this screen back on. Look for the checkbox entitled "Memorized - automatically uses last memorized citation."