

Family Tree Maker 2019

Step by Step Guide: Source Citations

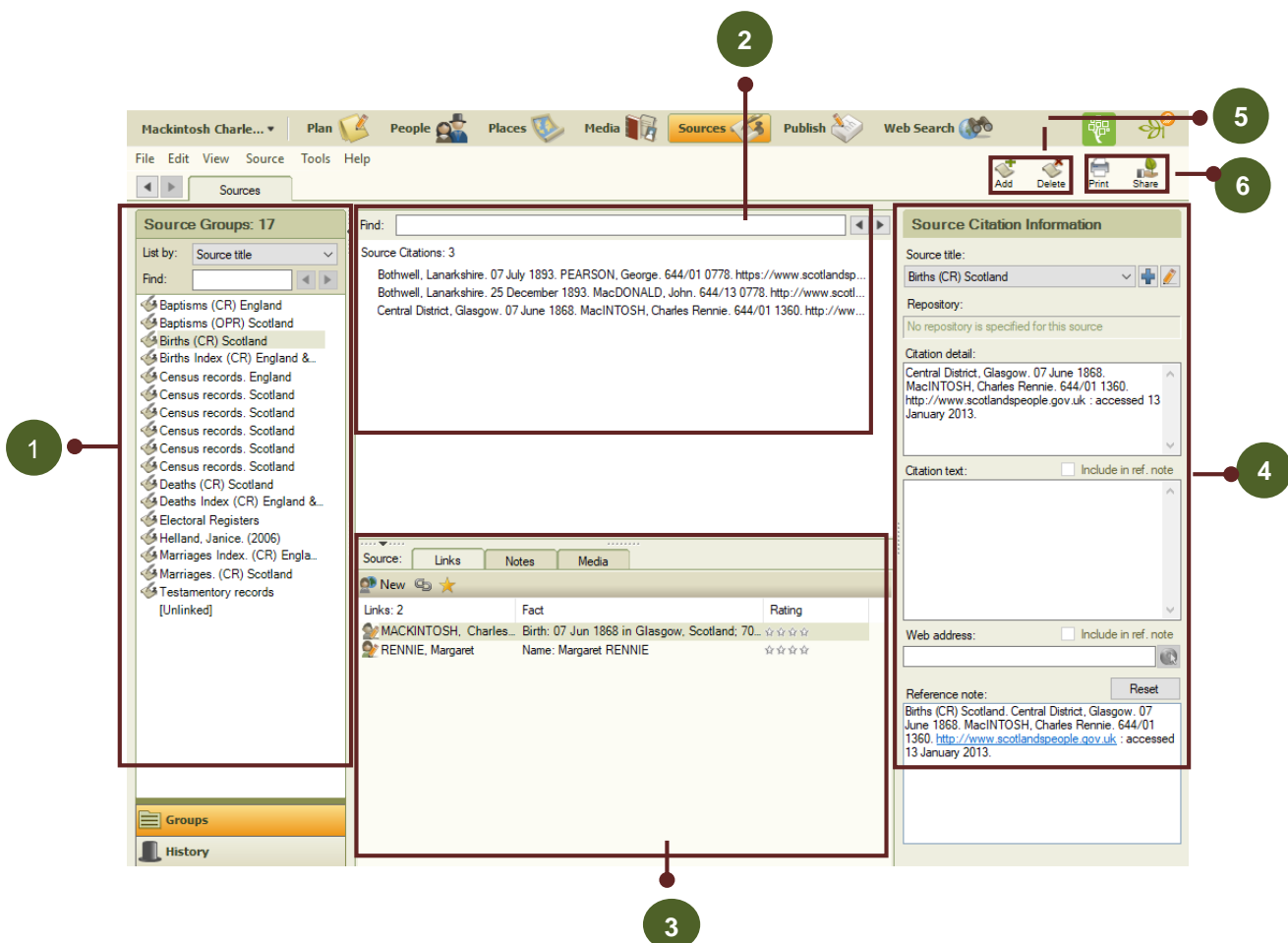
Introduction

This guide demonstrates how to record source citations in FTM in the format required for coursework. The required format is discussed at length in the course Referencing Guide, not in this document. Reading (and understanding) the Referencing Guide is necessary before using this document.

Although FTM has a number of source templates, these are US centric and do not conform to the course requirements. FTM does, however, have the capability to handle source citations in an acceptable format and this guide describes our recommended approach.

Basics

For everyday work in FTM you may generally operate within the People workspace and record sources from there. However, the best starting point for understanding source citations in FTM is the Sources workspace.



- 1 The Sources Groups panel provides a view of the types of sources that you have set up. List by source title is the most useful list option.
- 2 The Source Citations panel displays a list of all source citations that have been associated with the selected Source Group. Details of a selected source citation are displayed in the Source Citation Information pane and Sources tabs.
- 3 The Source Links panel displays individuals, notes, and media that are attached to the selected source citation.
- 4 The Source Citation Information panel shows the citation information for the currently selected source citation. Data can be edited in any of the fields.
- 5 Buttons to add new source citations or to delete currently selected source citations.
- 6 Print and Share buttons to enable various reports to be printed, sent by email or exported.

Note that each pane can be resized by dragging its margins.

FTM and the recommended Course approach

FTM assumes three levels of management of sources. In FTM terms, **source citations** are strings of data that support a fact (e.g. a reference from a book). A **source** is the document or media item that the citation comes from (e.g. a family history book) and a **repository** is a store of sources (e.g. a library or database). Some 170 source templates are provided in FTM to “help” record where facts were found.

However, none of these formats fit with the way we require sources to be referenced on the course! Thankfully, there are a number of ways that FTM can be used to achieve the format we require. Our recommended and preferred approach records part of the full reference as the **source title**, so for example “Deaths (CR) Scotland.” The rest of the reference is recorded as the **citation detail**. Secondary sources can be displayed in a similar way using the author and date as the source title, and the rest of the reference as the citation detail.

The consequences of this are:

- The Sources Groups panel displays groups of similar sources.
- The Source Citations panel shows each separate reference highlighted within a group of similar sources.
- One very minor downside is that FTM automatically inserts a comma rather than a full stop between the source title and citation detail. This can be edited, and it only takes a second to do so, but you won't be penalised for leaving the comma in.

The previous graphic shows an example of the Sources workspace when referencing is done in this way.

Other approaches could be used. For example, the full reference might be recorded as the source title. You may prefer an altogether different approach - if you find something better, let us know! However, the recommended approach is based on the experience and feedback from tutors and students.

Setting up new source citations

New source citations can be set up from the Sources workspace, or when entering a fact in the People workspace. If you have a new source, such as a census return, it is helpful to record it as a source, before recording any facts gleaned from the source.

We will use the following example from the Referencing Guide to demonstrate how to use FTM:

Deaths (CR) Scotland. Bowling, Old Kirkpatrick, Dunbartonshire. 16 June 1912. MACDONALD, Frances Grove. 501/00 0267. <http://www.scotlandspeople.gov.uk> : accessed 08 September 2014.

From within the Sources Workspace, click on the Add icon to open the Add Source Citation dialog box.

The screenshot shows the 'Add Source Citation' dialog box with the following fields and options:

- Source title:** A dropdown menu containing 'Deaths (CR) Scotland'. Buttons for 'New...' and 'Edit...' are to the right.
- Repository:** A text field containing 'No repository is specified for this source'.
- Citation detail:** A large text area with the placeholder text 'Enter the title, page #, file #, volume, Internet address, etc.'.
- Citation text:** A large text area with the placeholder text 'Enter pertinent text from the source and/or an explanation of the relevance of the data to your research.'.
- Web address:** A text field with the placeholder text 'Enter a web address for the source.' and a globe icon to the right.
- Include in reference note:** A section with two checked checkboxes: 'Citation text' and 'Web address'.
- Buttons:** 'Copy', 'OK', 'Cancel', and 'Help' are located at the bottom of the dialog.

The title is just the first part of the reference, so here type in **Deaths (CR) Scotland**.

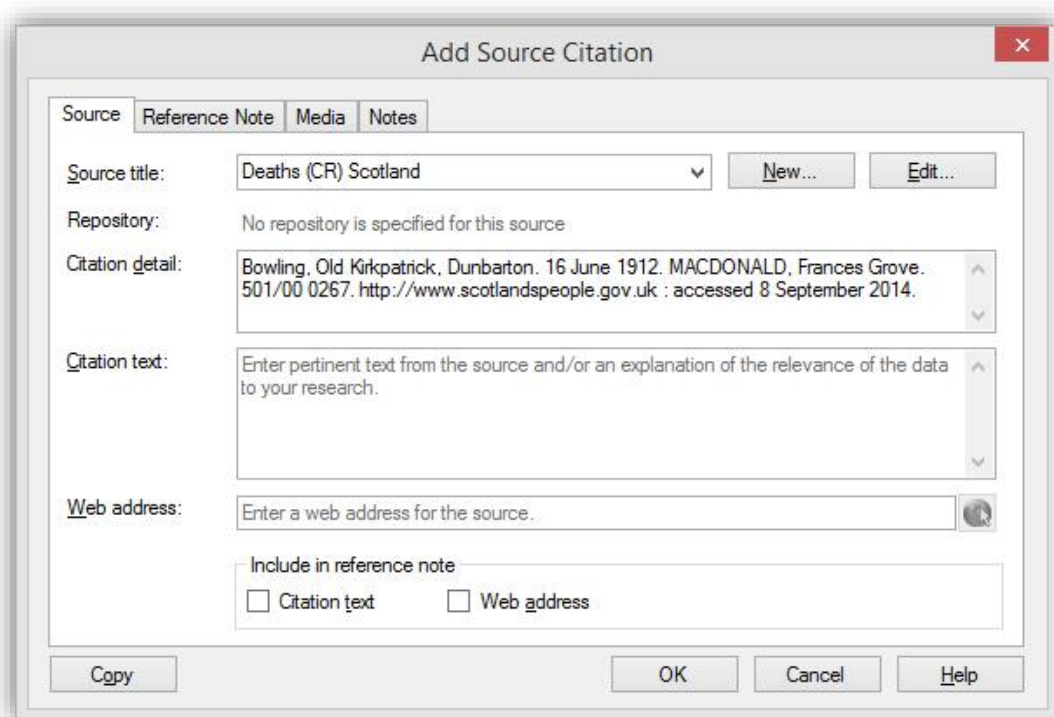
When deciding what to type into the source title box, consider which part of a reference does not change. So for references for death records in Scotland created by the government...i.e. civil records...the part of

the reference which will not change no matter how many death records you use, would be 'Deaths (CR) Scotland'. This part of the reference will be the same for all references for this type of source.

The rest of an individual reference is different as it includes specific information from a particular record such as the date of death and the name of the person who has died. This specific information gets put into the Citation detail box.

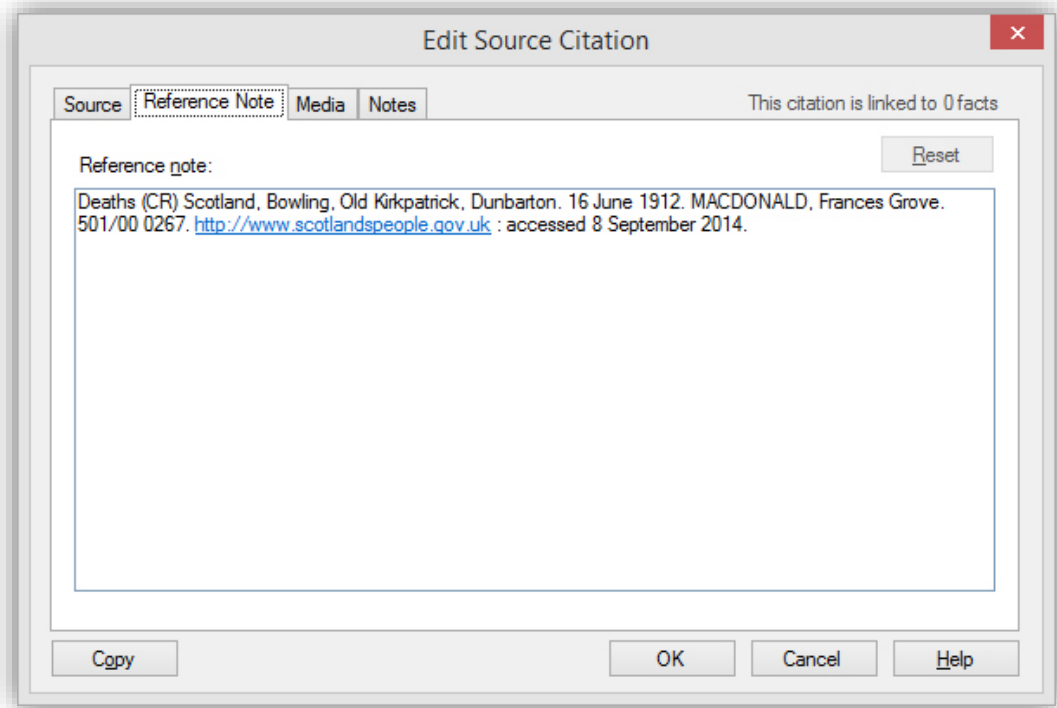
Leave everything else blank. Click on New and then on OK when FTM asks you if you want to create a new source. This closes the dialog box and returns you to the Add Source dialog box, with the new title filled in. Now enter the rest of the reference in the citation detail box – i.e. "Bowling, Old Kirkpatrick, Dunbartonshire. 16 June 1912. MACDONALD, Frances Grove. 501/00 0267. <http://www.scotlandspeople.gov.uk> : accessed 8 September 2014."

The dialog box should look like this:



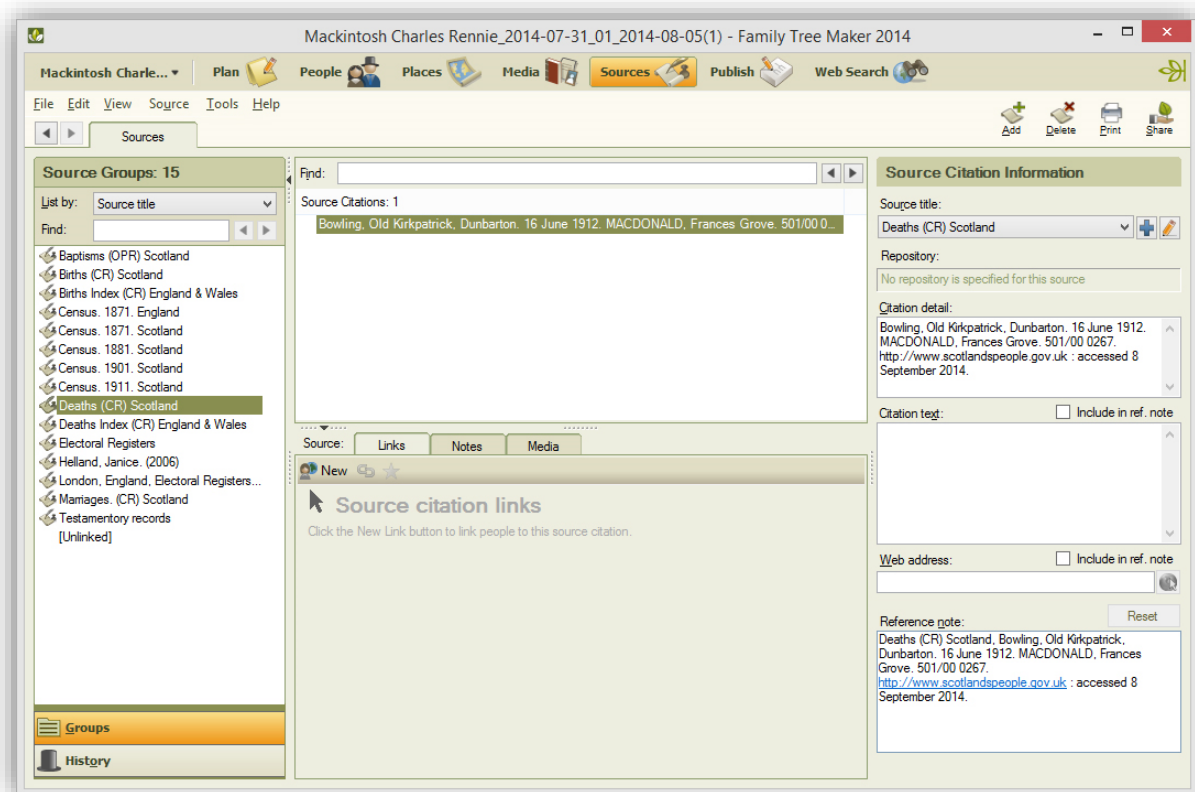
Click on the Reference Note tab. This shows how the full reference will be displayed. If you look very closely at the reference note at the bottom of the Source Citation information pane you will notice that FTM has inserted a comma after Scotland which, as mentioned earlier should strictly speaking be a full stop. If wanted, it can be edited out here, or in the reference note when the source is highlighted in the Sources workspace.

Part of the reference text should be able to be italicised here (this is the format in the Referencing Guide for some secondary source references). You need to click on the text within the reference to reveal an italicise text button – highlight the required part of the text, then click on the "I" button. There appears to be a bug in FTM2019 which means the italicisation is not showing up in references on reports or charts. Hopefully, this will be fixed soon...however, tutors will not penalise students who don't edit the comma or fail to use italicised text when appropriate in FTM though we may mention it in your feedback.



If you want to add an image of the source to the source citation, you can do so here by clicking on the media tab. Likewise notes can also be added, though for course work we do not want you to use this space for notes. Also, for coursework adding media is unnecessary. The citation text box should remain empty.

Click OK to save the citation and return to the Sources workspace. It should look like the following screenshot.



Step by Step Guide: Source Citations

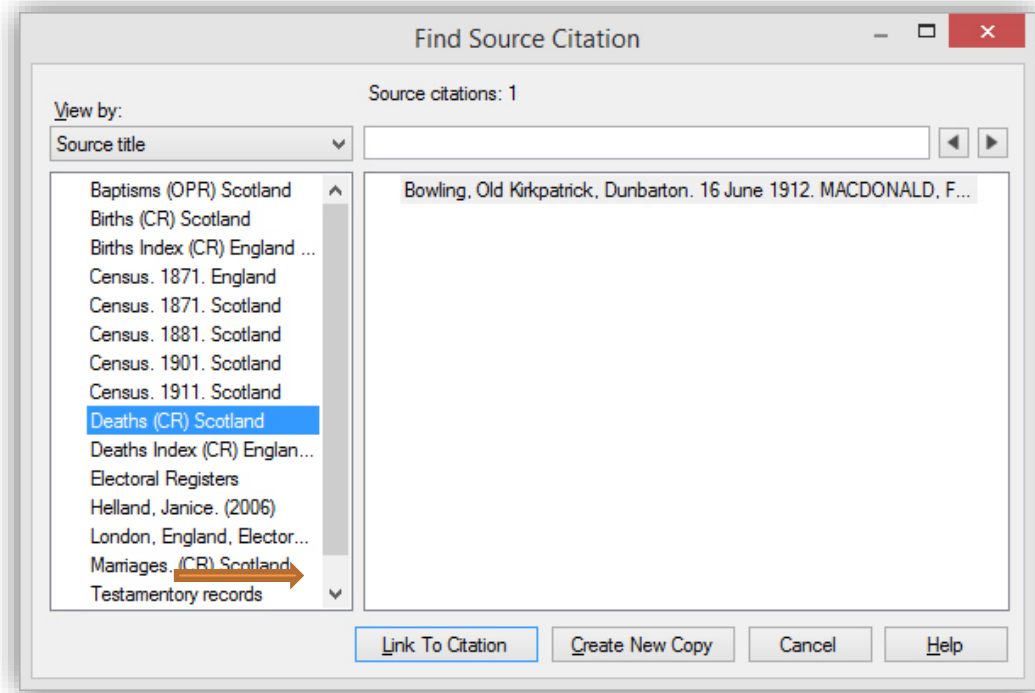
Now we need to attach the reference to a fact. Switch over to the People workspace by clicking on the People button in the Workspace menu, and select the Person tab.

The screenshot shows the People workspace for Frances G HARDEMAN. The 'Person Facts' pane is visible, showing a table of facts with columns for Fact, Date, Place / Description, and Preferred. The 'Death' fact is selected, and the 'Sources' tab is active. The 'New' button is highlighted, and a dropdown menu is open, showing options: 'Add New Source Citation...', 'Use Existing Source Citation...', 'Paste Duplicate Source Citation', and 'Paste Link to Source Citation'. An orange arrow points to the 'Use Existing Source Citation...' option.

Fact	Date	Place / Description	Preferred
Personal Information			
Name		Frances G HARDEMAN	0 0 0 Preferred
Sex		Female	1 1 0 Preferred
Individual Facts			
Birth	Abt. 1838	Cradley, Worcestershire, England	1 1 0 Preferred
Census	02 Apr 1871	Kidsgrove, Ravenscliffe, Staffordshire, England; Nelson Buildings	1 1 1 Preferred
Death	16 Jun 1912	Bowling, Dunbartonshire, Scotland; Dunglass Castle	0 0 1 Preferred
Probate	27 Jan 1913	Dumbarton Sheriff Court, Dunbartonshire, Scotland; Deed [Trust Disposit...	1 0 1 Preferred
Probate	01 Feb 1913	London, England; Confirmation of executors	1 0 1 Preferred
Cause of Death		Periculous anaemia, 1 year 6 months	0 0 0 Preferred

We can see from the first column of zeros in the Person Facts pane that there are no sources cited for the death fact. With the death fact selected, click on the arrow next to the New button. Click on "Use Existing Source Citation" to open the Find Source Citation dialog box. (Clicking on Add New Source Citation would open the Add New Source dialog we accessed from the Sources workspace.)

This close-up screenshot shows the 'New' dropdown menu in the Sources tab of the Person Facts pane. The menu is open, and the 'Use Existing Source Citation...' option is highlighted with an orange arrow. The menu items are: 'Add New Source Citation...' (Ctrl+S), 'Use Existing Source Citation...' (Ctrl+Shift+S), 'Paste Duplicate Source Citation', and 'Paste Link to Source Citation'. The background shows the 'Death' fact selected in the Person Facts pane.



If there are multiple entries in the list, change the view by option to Source title to help filter the citations. Select the desired reference and click the Link to Citation button.

The citation is now linked to the death fact, and is visible in the Person Information pane. You can add as many citations as required by following the same steps.



Note the new buttons that now appear beneath the tabs.



Copy source citation: click on this to copy the source citation. Go to the fact you want to add the citation to. Click on the arrow next to the New source button and select Paste Duplicate Source Citation to create the copy. This is an identical but separate source citation which can be edited without affecting the original. This can be a quick way of inputting new and similar citations.



Edit source citation: clicking on this opens the Edit Source Citation dialog box where the relevant fields can be edited.



Unlink source citation: this allows you to unlink a source citation from a fact. It does not delete the citation – useful if you have accidentally linked to the wrong fact. You are asked to confirm if you are sure before the citation is unlinked.



Rate source citation: enables the quality of a source to be rated and recorded. Further details of this facility for rating sources are provided in C1.5 and although we do not require this to be used for coursework, it can be a helpful tool.



View source citation usage: opens a Source Usage dialog box.

Source Usage Reports

FTM has four standard reports that specifically look at sources. These are found in the Publish workspace under the Source Reports publication type. The Source Usage Report displays for each source the individuals and facts linked to it. The Documented Facts Report lists every fact for which there is a source citation, and the Undocumented Facts Report does the reverse, listing all facts for which there is no source information. The Source Bibliography is not particularly useful for coursework.

Further hints and tips for coursework

- Once a source title (e.g. Deaths (CR) Scotland.) has been set up, it can be used when setting up further similar references. Instead of clicking on the New button in the Add Source Citation dialog box (see page 4) select the appropriate source title from the drop down list and then just enter the remaining part of the reference in the citation details field. It isn't a template, but it does save on some typing!
- Remember the mantra "every fact needs a source." Use the Undocumented Facts Report to ensure that this is the case. One exception to this mantra can be made for a person's name. There is *usually*

no need to link any source to the name *fact* if there is any other information (so if you have a birth certificate, the birth *fact* will show the source). If no other information exists other than the name, or perhaps an alternative name, then the name fact will need a source to explain where the information came from.

- Make sure that you select the option to include sources on all charts and reports produced for coursework (unless advised otherwise). The relevant Step by Step Guides explain how to do this. However, outside of the course environment, it is not usual to include sources with a chart, especially where it is accompanied with a report including sources.
- We have only used Deaths (CR) Scotland as an example here. Other examples of source types are included in the Referencing Guide.
- What about secondary sources? Use author and date of publication (if known) as the source title and record the rest of the reference as the citation detail.
- Citation text. Some students find it useful to add text from a source, or to make notes about the source in the citation text field. However, this should not be included in the final citation reference (as this does not conform to the Referencing Guide). If the information recorded is useful, and you wish it to be seen in your coursework, add a comment within an individual's person or research notes.

Find some time to play with recording source citations **before** you start your coursework. Ultimately it will save you time!