

DOCUMENTING YOUR GENEALOGICAL RESEARCH

I. Genealogical or Family History Research

Research is more than names, dates, and places. It is family historian's goal to find the records and documents and then analyze the accuracy and credibility of those sources.

A. Family History Standards

Family-history standards require a higher level of proof than does most litigation. Genealogy accepts no margin of error. A single error in identity will be multiplied with each generation beyond the error.

B. Conclusions

There are three types conclusions that can be determined in establishing the reliability of our information:

1. Hypothesis – a proposition based upon analysis of evidence. Must be proved or disproved.
2. Theory – a tentative conclusion after a hypothesis has been researched but evidence is still short of proof. Terms such as “perhaps”, “possibly”, “likely” may be used.
3. Proof – a conclusion based upon the sum of the evidence. A conclusion cannot always be reached; in which case, the question remains unknown until sufficient evidence is developed.

C. Genealogical Proof Standards – five conditions that a valid conclusion must meet:

1. Thorough research
2. Complete and accurate citation of sources
3. Skilled analysis and correlation of data
4. Resolution of any conflicts in the evidence
5. A soundly reasoned written conclusion that details all the evidence, analyses, and documentation (a proof argument)

D. Levels of Confidence – qualifying terms

(Note: an “assertion” is a claim or statement of fact)

1. Certainly – no reasonable doubt based upon research and evidence
2. Probably – the assertion is more likely than not to be accurate, based upon research and evidence.
3. Possibly – some evidence supports the assertion, but it is far from proved.
4. Likely – the odds weigh at least slightly in favor of the assertion.
5. Apparently – an impression or presumption has been formed based upon common experience – but it has not been tested.
6. Perhaps – the idea is plausible, although it remains to be tested.

E. Objectivity

The history researcher objective should be to discover and explain – not to promote any certain image, defend, or prosecute.

F. Technical Knowledge

The researcher needs to understand the history and circumstances under which a record is created. Every source type has its peculiarities that affect both the meaning and the weight of the evidence.

G. Classes of Evidence

1. Generic Labels

- a. Primary Source – one created by someone with first-hand knowledge or created at or about the time an event occurred.
- b. Printed Primary Source – a source that has been transcribed or abstracted and published (by reliable editors).
- c. Secondary Source – everything else

2. Legal Terminology

- a. Beyond Reasonable Doubt – applied in criminal cases – impractical for history researchers
- b. Clear and Convincing Evidence – intermediate standard – question of what is “clear” and what is “convincing”.
- c. Preponderance of the Evidence – evidence on one side needs to outweigh bit slightly the evidence on the other side – can be confusing.

H. Formats of Processed Records

1. Abstracts vs Extracts
2. Databases and Indexes
3. Duplicate Copies
4. Duplicate Originals (Counterparts)
5. Image Copies
6. Record Copies (Clerk’s Copies)
7. Transcriptions vs. Translations
8. Transcriptions, Edited or Embellished

II. Fundamentals of Citation

Citations are statements in which we identify our source or sources for a particular assertion.

A. Types of Citations

1. Source Lists – keep track of the materials that have been examined and details about those records
2. Reference Notes – used in narrative writing to identify the source of individual statements – should offer a complete citation to the specific part of the source that provided the information.
3. Source Labels – citations we add to image copies of documents or to abstracts or transcriptions.

B. Common Practices

1. Citing Derivatives & Imaged Sources
2. Citing Indexes and Finding Aids
3. Citing National Archives Material
4. Citing Page Numbers
5. Citing Personal Knowledge
6. Citing Personal Names
7. Citing Personal Titles, Credentials & Degrees
8. Citing Published vs Unpublished Materials
9. Citing Repositories
10. Citing Several Sources for a Single Fact
11. Citing the Source of a Source
12. Citing Titles, Basic Rules
13. Citing Titles in Foreign Languages

C. Family History Library

The Salt Lake Family History Library (FHL) in Salt Lake City has the largest library of historical document images. Most of the library's film, fiche and digital images are not publications but preservation copies made throughout the world by the Genealogical Society of Utah (GSU), operated by The Church of Jesus Christ of Latter-day Saints (LDS). Neither the FHL nor the GSU consider the circulated prints to be publications. The term *FHL film* indicates that a film is a GSU-created film.

When published books have been filmed for the FHL, those books should be cited the same way as the original book. Using the FHL film number at the end of the citation indicates that the film version was used rather than the original.

When you use film at the FHL or one of the worldwide Family History Centers (FHC), you will be citing one of three types of films.

1. Film or fiche published by other agencies
2. Preservation copies of records originally created by LDS, for which FHL is the official repository of the preservation copy
3. Preservation copies of non-LDS records, filmed by GSU, for which originals are held in record offices and archives elsewhere.

D. Online Materials

A website is not a repository. The repository would be the Internet or the World Wide Web. Most websites are the online equivalent of a book. Therefore, we cite:

1. Author, creator, owner of website
2. Title of the website (in italics)
3. Type of item (book, manuscript, database)
4. Publication data of item
5. Place (Uniform Resource Locator or "URL") – case sensitive
6. Date (posted, updated, copyrighted, or accessed)

7. Specific detail for that citation (page, section, paragraph, etc)

E. **Organization Section** – a section on punctuation and abbreviations.

III. QuickCheck Models

QuickCheck Models have been created by the author to show examples of citation for all the different types of records. These Models include the following parts:

The Source List Entry – an individual citation within a source list or bibliography.

The First (Full) Reference Note – the first citation for a particular source, at which time the source is cited in full, with any descriptive detail needed for identification and analysis. Cite in full the creator of the film.

The Subsequent (Short) Note - an abridged identification of a source that is used to conserve space, once a source has been cited in full in the first reference note.

Following the QuickCheck Models are detailed explanations of the Guidelines and Examples for each of the topics in that particular category.

- A. **Archives and Artifacts**
- B. **Business and Institution Records**
- C. **Cemetery Records**
- D. **Census Records**
- E. **Church Records**
- F. **Local and State Records – Courts and Governance**
- G. **Local and State Records – Licenses, Registrations, Rolls & Vital Records**
- H. **Local and State Records – Property and Probates**
- I. **National Government Records**
- J. **Publications – Books, CDs, Maps, Leaflets and Videos**
- K. **Publications – Legal Works & Government Documents**
- L. **Publications – Periodicals, Broadcasts and Web Miscellanea**

Bibliography

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QUICKSHEET – CITING ONLING HISTORICAL RESOURCES. Evidence Style. Elizabeth Shown Mills, CG, CGL, FASG. Baltimore, MD: Genealogical Publishing Company, first revised edition 2007.