

# Why Document?

- To help you decide what to do with conflicting information
- To help you keep track of contacts and evaluate them
- To help other researchers find the sources you have found
- To keep you from wondering, later, “why did I say that?”

# Documenting

- Everything you add to your legacy database should be documented
- Record sources with enough detail that any other person in the future, including yourself, could find the same information
- Don't think you can save time by going back and citing sources later; we are senior citizens!
- Keep track of addresses, phone numbers, email addresses of sources, but mark them as private; your contact list is priceless!

# Documenting

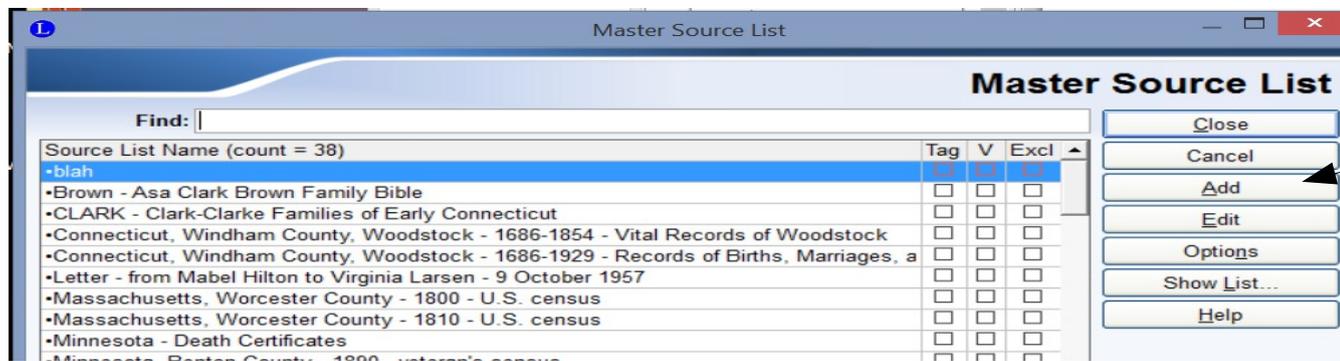
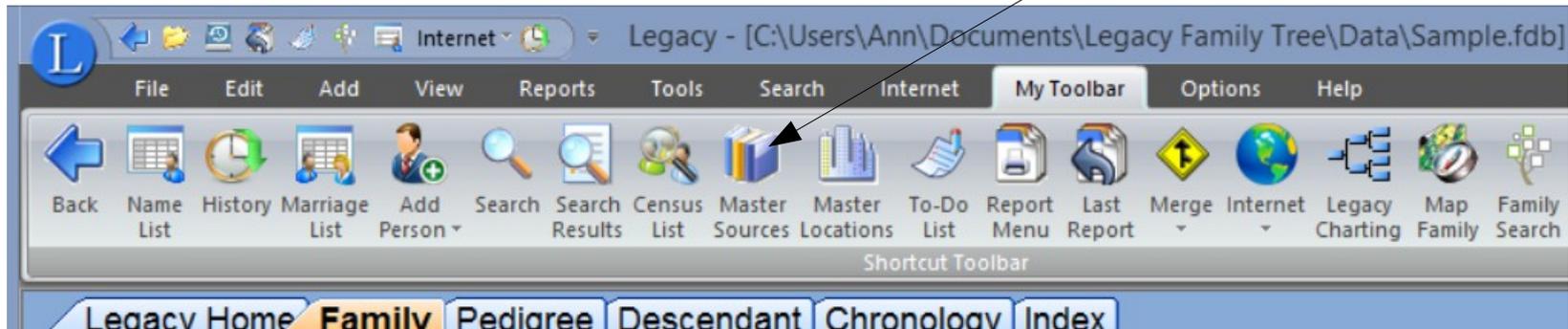
- If something isn't documented, it is only myth
- Stay away from Ancestry trees that are undocumented; they contain myths, or at best hints
- If you do use an Ancestry tree, document it anyway, so you can remember where the information came from
- Look at the original document if you can; transcription errors are common
- Make life easier: Use Legacy shortcuts
  - SourceWriter
  - Clipboard
  - Sharing

# Sources

- Sources in Legacy are composed of
  - Source Name
  - Detail (page number, reel number, plot number, etc.) within that Source
  - Author information
  - Repository information
- Source Names refer to the source as a whole, e.g. “History of Coshocton”, and are listed in the Master Source List
- Details are cited only as they are applied to specific information, for a specific individual, e.g. “page 12”, “plot 402”, “reel 39”
- Both Source and Detail can have media attached, such as document photo, page photo, tombstone photo, Aunt Bessie's recorded memoirs

# Add a Source

- When you come upon new information, add the source to the Master Source List
- Click on the Master Sources icon on My Toolbar, then on “Add”



# Add a Source

- Sourcewriter does the work for you, and makes you look professional
- Choose the SourceWriter Template and follow the instructions for the type of documentation you have

**Step 1. Add a New Master Source.  
using SourceWriter**

Cancel  
Help

What kind of source do you want to cite?:  
 Search

OR choose the type of source from this list:

- \*Add a Basic Style source
- Add a generic source here
- Artifacts
- Banking records
- Bible
- Birth records**
- Books
- Cemetery records
- Census records

1) Select the type of birth record:  
Birth register

2) Where was the register created?  
Created at city/local level

3) Select the medium:  
Online database

Go to Step 2

OR select one of your bookmarked source types:  
 Go to Step 2

[Create a bookmark for the selected source type](#)      [Delete Bookmark](#)

# Add a Source

- Use the actual source title for the Master Source list name so you can find it again

Save your work!

If you have media pertaining to this source

**Step 2. Fill in the fields below.**  
You selected: Birth records > Birth register > Created at city/local level > Online database

**Source Info** | Text/Comments | Repository | Media | Override

Source List Name (name to display in master source list): Connecticut Town Birth Records, pre-1870 (Barbour Collection)

Author Last Name: Barbour

Author Given Name(s): Type the given name(s) of the database's author.

Author Suffix: Ex.: Jr., IV, etc.

Agency/Creator: Or, if authored by an agency, type the name here.

Database Title: Connecticut Town Birth Records, pre-1870 (Barbour Collection)

Format: Database

Website Creator: Type the author/creator of the website if different from the database author.

Website Title: Ancestry.com

URL: Type the main URL of the website.

Date: Type the date posted, updated, or copyrighted.

Verified  
 Tag  
 Exclude from reports

Recorded Date: 21 Mar 2015  File ID:

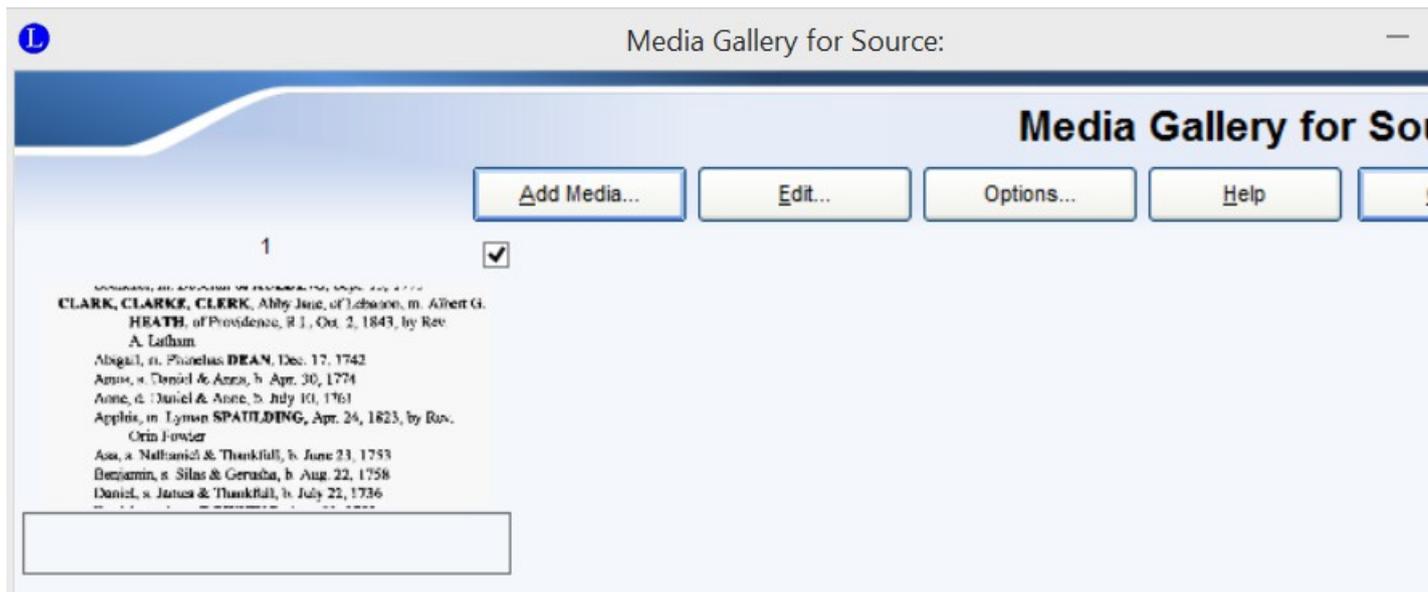
[Click here to select a different source template.](#)

Save  
Cancel  
Options  
Help

**Output Preview:**  
**Footnote/Endnote Citation:**  
Barbour, "Connecticut Town Birth Records, pre-1870 (Barbour Collection)," database, Ancestry.com.  
**Subsequent Citation:**  
Barbour, "Connecticut Town Birth Records, pre-1870 (Barbour Collection)," database.  
**Bibliography:**  
Barbour, "Connecticut Town Birth Records, pre-1870 (Barbour Collection)." Database. Ancestry.com.

# Add a Source

- If you have media pertaining to this source, click on the Media tab and add the media type
- Media pertaining to a detail within the source should be stored later, with that detail, not with the source



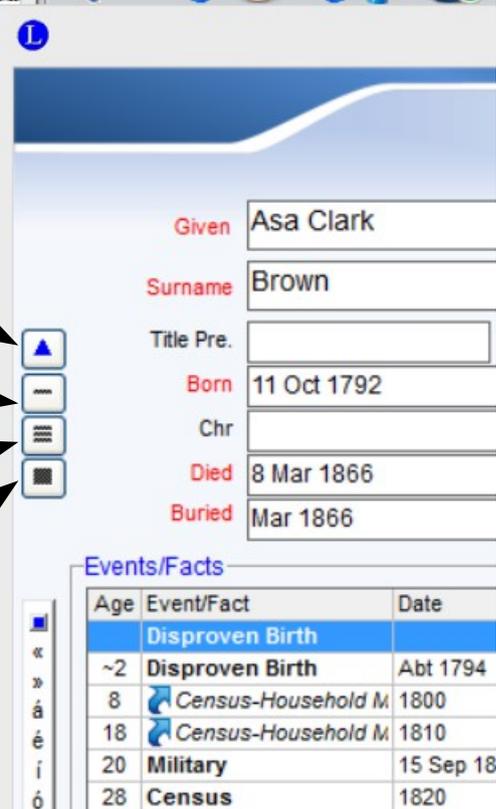
# Add a Source

- The new source may
  - Add new individuals to your database
  - Confirm facts about an individual already in your database
  - Provide evidence of parentage about one or more individuals in your database
  - Add one or more events to one or more individuals already in your database
- Unless the source confirms only one fact or event in your database, you should put the source in the clipboard

# Use the Clipboard

Tools for using the clipboard are found at any data entry page,

- Update clipboard information
- Attach clipboard information to this individual
- Cite clipboard information for all entered data for this individual
- Attach clipboard information to “unspecified” data about individual

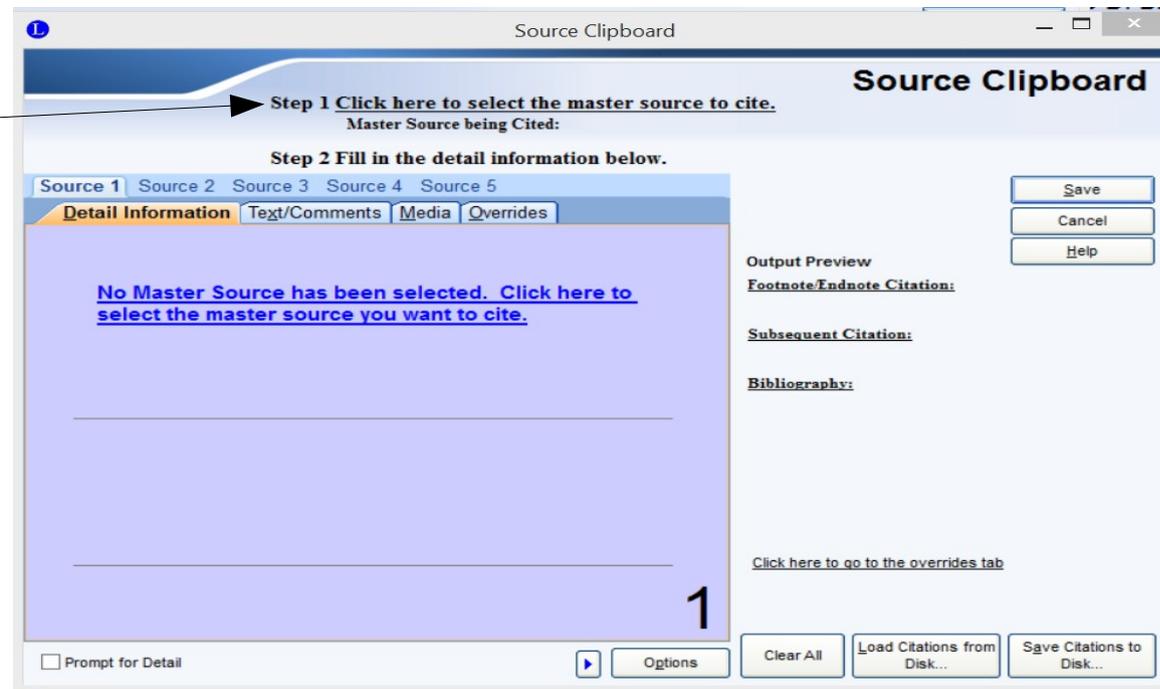
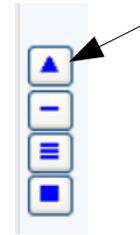


The screenshot shows a data entry form for an individual named Asa Clark Brown. The form includes fields for Given name (Asa Clark), Surname (Brown), Title Pre., Born (11 Oct 1792), Chr, Died (8 Mar 1866), and Buried (Mar 1866). Below the form is a table titled "Events/Facts" with columns for Age, Event/Fact, and Date. The table contains the following entries:

Age	Event/Fact	Date
	Disproven Birth	
~2	Disproven Birth	Abt 1794
8	Census-Household M	1800
18	Census-Household M	1810
20	Military	15 Sep 18
28	Census	1820

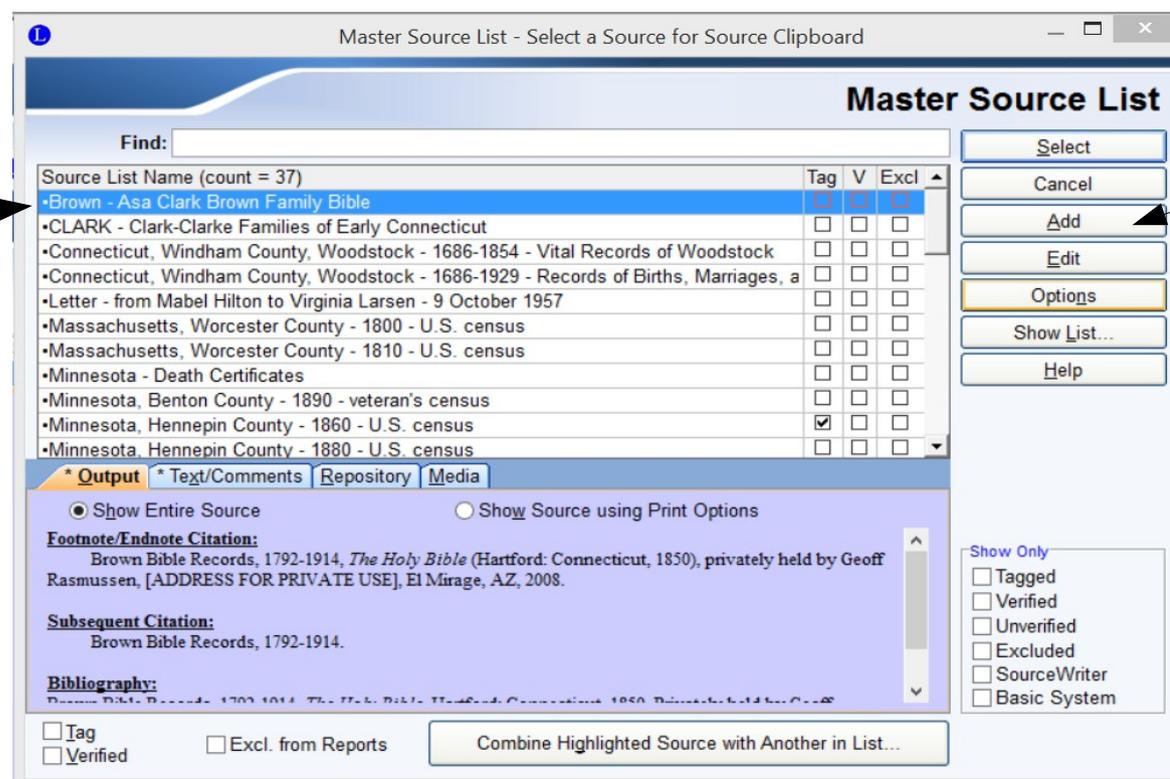
# Update the Clipboard

- Click on the Update icon on any data entry page to bring up the Source Clipboard page
- Click on step 1 to bring up the Master Source List



# Update the Clipboard

- Double click on the source to select it, if it is already listed, or click on “Add” to add a new source



# Update the Clipboard

- Fill in the detail information for the first individual here, if any
- If the detail information will change with each individual, check the “prompt for detail” box
- Click on save!

The screenshot shows the 'Source Clipboard' application window. The main area is divided into two steps: Step 1 (changing the master source) and Step 2 (filling in detail information). The 'Detail Information' tab is active, showing fields for Page, Detail, Surety Level, Recorded Date, and File ID. There are also checkboxes for adding details to reports and a 'Verified' checkbox. A 'Prompt for Detail' checkbox is at the bottom left. The right side shows an 'Output Preview' with 'Footnote/Endnote Citation', 'Subsequent Citation', and 'Bibliography' sections. A 'Save' button is highlighted with an arrow, and a '1' is next to the 'Clear' button.

Source Clipboard

Step 1 [Click here to change the master source to cite.](#)  
Master Source being Cited: Brown - Asa Clark Brown Family Bible

Step 2 Fill in the detail information below.

Source 1 | Source 2 | Source 3 | Source 4 | Source 5

**Detail Information** | Text/Comments | Media | Overrides

Page:

Detail:

Optional...

Surety Level:

Analyze Source Quality

Recorded Date:  Today's Date

File ID:

Add this Detail to the Source Citation on Reports

Include this Citation on Reports

Verified

Clear 1

Prompt for Detail

Save

Cancel

Help

Output Preview

**Footnote/Endnote Citation:**  
Brown Bible Records, 1792-1914, *The Holy Bible* (Hartford: Connecticut, 1850), privately held by Geoff Rasmussen, [ADDRESS FOR PRIVATE USE], El Mirage, AZ, 2008.

**Subsequent Citation:**  
Brown Bible Records, 1792-1914.

**Bibliography:**  
Brown Bible Records, 1792-1914. *The Holy Bible*. Hartford: Connecticut, 1850. Privately held by Geoff Rasmussen, [ADDRESS FOR PRIVATE USE], El Mirage, AZ. 2008.

[Click here to go to the overrides tab](#)

Clear All Load Citations from Disk... Save Citations to Disk...

# Adding Several Facts to an Individual

- If this is a new individual, you will probably have several facts, all of which need to be documented to the same source
- After adding the source to the Master Source List and updating the clipboard, navigate to the individual, or add a new individual
- Enter the new information about that individual

# Enter Detail

- Use the Detail page for page numbers or other information specific to the data you are documenting
- If the Detail is different for each individual, check the “prompt for detail” box

**Source Clipboard**

Step 1 [Click here to change the master source to cite.](#)  
Master Source being Cited: just testing

Step 2 Fill in the detail information below.

**Detail Information** | Text/Comments | Media | Overrides

Page:

Optional...  
Surety Level:

Recorded Date:

File ID:

Add this Detail to the Source Citation on Reports  
 Include this Citation on Reports  
 Verified

Prompt for Detail

Output Preview  
**Footnote/Endnote Citation:**  
(MS).  
**Subsequent Citation:**  
**Bibliography:**  
MS.

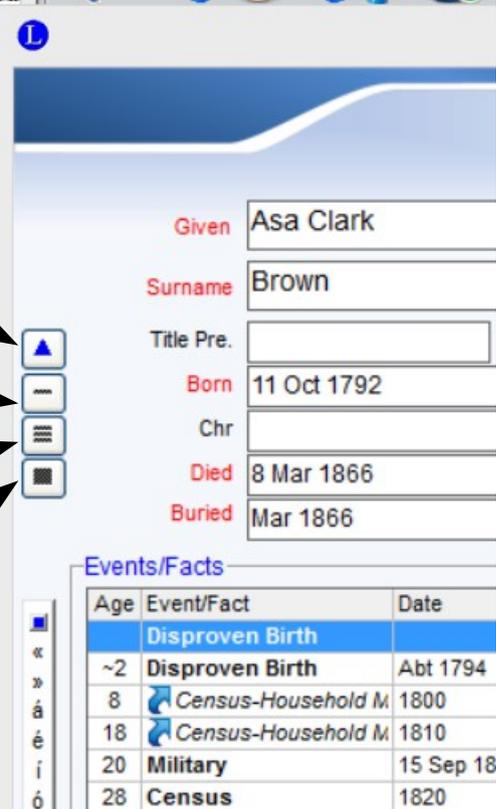
[Click here to go to the overrides tab](#)

Save your work!

# Use the Clipboard

Tools for using the clipboard are found at any data entry page,

- Update clipboard information
- Attach clipboard information to this individual
- Cite clipboard information for all entered data for this individual
- Attach clipboard information to “unspecified” data about individual



Given Asa Clark

Surname Brown

Title Pre.

Born 11 Oct 1792

Chr

Died 8 Mar 1866

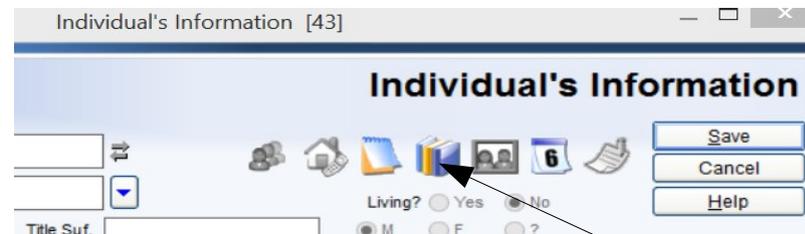
Buried Mar 1866

Events/Facts

Age	Event/Fact	Date
	Disproven Birth	
~2	Disproven Birth	Abt 1794
8	Census-Household M	1800
18	Census-Household M	1810
20	Military	15 Sep 18
28	Census	1820

# Use the Clipboard

- If you are documenting only some of the data about the individual, place the cursor on each field and click on “-”
- If you are documenting all non-blank fields for the individual, click on “=”
- Events that have been documented will have highlighted source icons 
- Facts (name, birth, christening, death, nickname) that have been documented can be seen by clicking the source icon at the top of the Individual's Information page



# Use the Clipboard

- The Assigned Sources page shows you the citation for each bit of information about the individual
- The top line is “unspecified”, meaning you have a general source for this individual, but no specific data
- Click on the data you want to provide a citation for. You can have more than one citation for any field
- Click on “-” or “Cite a Master Source” or “Add a Master Source”

The screenshot shows the 'Assigned Sources' window with the following table:

Events	Source List Name	Detail	V
Unspecified			<input type="checkbox"/>
Name			<input type="checkbox"/>
Birth	•Minnesota - Death Certificates	death certificate,	<input checked="" type="checkbox"/>
Christening			<input type="checkbox"/>
Death	•Minnesota - Death Certificates	death certificate,	<input type="checkbox"/>
Burial	•Minnesota - Death Certificates	death certificate,	<input type="checkbox"/>
Notes			<input type="checkbox"/>
Research			<input type="checkbox"/>
Medical			<input type="checkbox"/>
Death Cause			<input type="checkbox"/>
Never Married			<input type="checkbox"/>
census	•Pennsylvania, Venango County - 1840 - U.S. cer. Scribbrass, Tow		<input type="checkbox"/>

Birth: 9 Jul 1822, Tionesta, Venango, Pennsylvania, United States  Show all Events

Buttons: Close, Edit Detail, Edit Source, Remove, Zoom, Help, Print a Source Label, Cite a Master Source, Add a New Source...

Output: \* Output \* Text/Comments \* Repository \* Media

Options:  Show Entire Source  Show Source using Print Options

**Footnote/Endnote Citation:**  
Minnesota Division of Vital Statistics, death certificate 22231, registration no. 156 (1918), Lorenzo D. Brown; Minnesota Department of Health, Minneapolis; County: Hennepin; City: Minneapolis; address: 3120 Fremont Ave So, 8 ward; sex: male; color: white; widowed; born: July 9, 1822; age 95 years, 6 months, 5 days; minister; born in Pennsylvania; father: A. C. Brown, born in Massachusetts; mother: unknown, born in Massachusetts; informant: M. F. Brown, 3120 Fremont Ave So; date of death: January 14, 1918; place of burial: Lakewood.

**Subsequent Citation:**  
Minnesota death certificate 22231, registration no. 156 (1918), Lorenzo D. Brown.

# Share the Event

- If an event has more than one participant, such as a census, will, pension, etc., the event should be shared, not repeated.
- Fill in the event data, including citations and media
- Click on “Share Event”

The screenshot shows a web form titled "Add Event to Milton Frances Brown". The form contains the following fields and controls:

- Event/Fact:** A dropdown menu with "Census" selected.
- Description:** A text input field containing "federal".
- Date:** A text input field containing "1860".
- Place:** A text input field containing "Minneapolis, Hennepin, Minnesota, United States".
- Buttons:** A vertical column of buttons on the right side: "Save", "Cancel", "Share Event..." (indicated by an arrow), "Spell Check", "Wordwrap...", "Add Another", "Zoom...", "Clear", "Repeat", and "Help".
- Notes Section:** A tabbed interface with "Notes" and "Sentence Override" tabs. The "Notes" tab is active, showing a text area with a rich text editor toolbar (bold, italic, underline, link, etc.) and a "Strip HTML" button.
- Footer:** A "Refresh Sentence" button, an "Edit Event Sentence Definition..." button, a preview of the sentence: "He appeared on the federal census in 1860 in Minneapolis, Hennepin, Minnesota, United States.", a checkbox for "Exclude this instance of this event from problem checking", and a "Private" checkbox.

# Share the Event

- Click on “Add one or more people”
- Click on “Select from the Name List”



# Share the Event

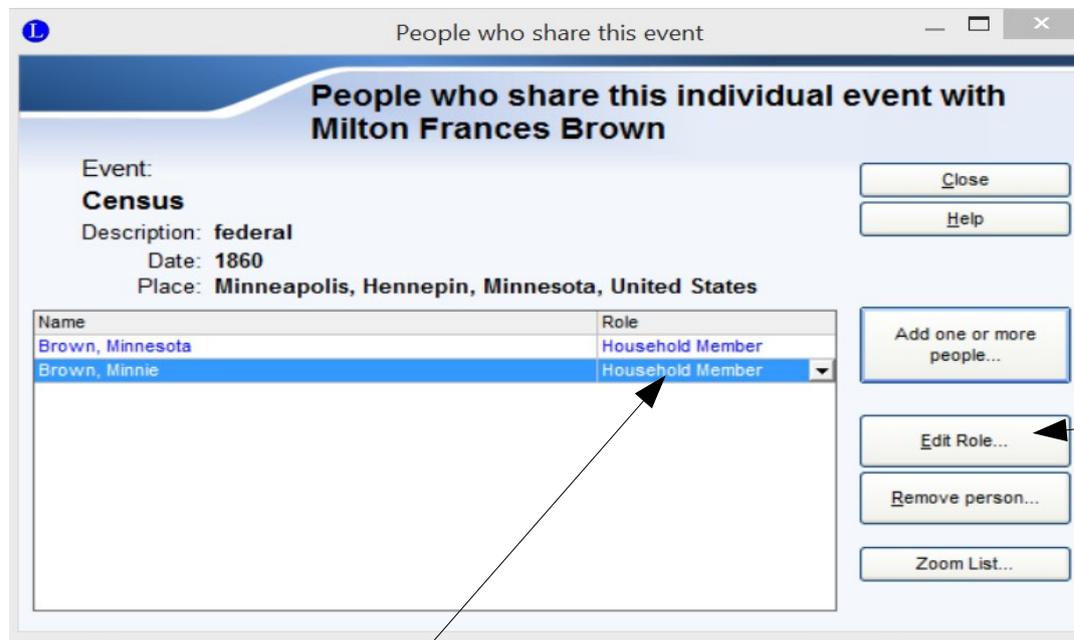
- Navigate to the individuals you want to share the citation and check the boxes next to their names
- Click on the **Select** button on top of the page

The screenshot shows a software window titled "Name List Contains 260 Names including Alternate and Married Names". The window has a "Name List" header and a search bar with fields for "#:", "Given:", and "Surname:". Below the search bar is a "Select" button with a red checkmark and a "Close" button. A row of letters (A-Z) is used for filtering. The main table lists names with checkboxes and columns for "RIN", "Name", "Sex", and "1 2 3". The selected individual is "35 Brown, Milton Frances (1856-1931)". A right-hand pane shows "Immediate Relatives" with a checked box for "self-Brown, Milton Frances (1856-1931)". At the bottom, there are buttons for "Edit Father", "Edit Mother", and "Edit Marriage", along with radio buttons for "Show Father's Info" and "Show Mother's Info". The birth information is "9 Jul 1822 Tionesta, Venango, Pennsylvania, United States".

RIN	Name	Sex	1	2	3
<input checked="" type="checkbox"/>	35 Brown, Milton Frances (1856-1931)	M			
<input type="checkbox"/>	64 Brown, Mina Viola (1874-1937)	F			
<input type="checkbox"/>	32 ~ Brown, Minnesota (1858-1929)	F			
<input type="checkbox"/>	93 Brown, Minnesota (Abt 1859-)	M			
<input type="checkbox"/>	32 Brown, Minnie (1858-1929)	F			
<input type="checkbox"/>	53 § Brown, Molly (1765-)	F			
<input type="checkbox"/>	90 Brown, Myrtle Inez (1872-1954)	F			
<input type="checkbox"/>	54 Brown, Nathan (1755/1765-)	M			
<input type="checkbox"/>	23 Brown, Nathan R. Reverend (Abt 1817-189	M			
<input type="checkbox"/>	84 § Brown, Nora Josephine (1873-1940)	F			
<input type="checkbox"/>	154 Brown, Norman Wells	M			
<input type="checkbox"/>	60 Brown, Olive Semiramis (1872-After 1942)	F			
<input type="checkbox"/>	68 Brown, Philena (Abt 1857-)	F			
<input type="checkbox"/>	88 Brown, Ralph Lauriston (1877-1951)	M			
<input type="checkbox"/>	15 Brown, Rebecca (Abt 1844-)	F			
<input type="checkbox"/>	52 Brown, Rebekah (1794-1796)	F			
<input type="checkbox"/>	121 Brown, Ruth (1801-)	F			
<input type="checkbox"/>	134 Brown, Samuel (1730-1788)	M			
<input type="checkbox"/>	75 Brown, Samuel (1835-)	M			
<input type="checkbox"/>	51 Brown, Samuel Miller (1795-)	M			
<input type="checkbox"/>	30 Brown, Sarah M. (1850-After 1918)	F			

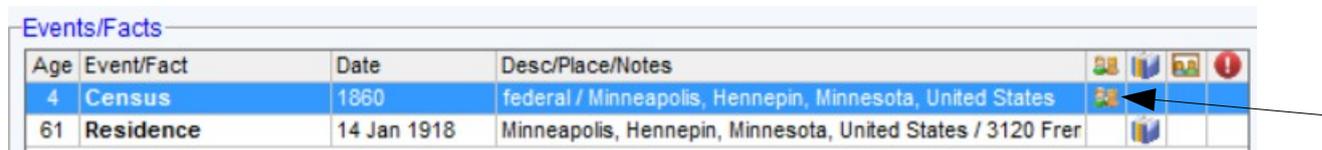
# Share the Event

- Appropriately change the role of each individual in the event (household member, witness, beneficiary, etc.). Add roles as you see fit.



# Share the Event

- Events that have been shared have a shared icon



The screenshot shows a table titled 'Events/Facts' with the following data:

Age	Event/Fact	Date	Desc/Place/Notes	Icons
4	Census	1860	federal / Minneapolis, Hennepin, Minnesota, United States	Shared icon (two people), Book icon, Error icon
61	Residence	14 Jan 1918	Minneapolis, Hennepin, Minnesota, United States / 3120 Frer	Book icon

An arrow points to the shared icon in the 'Census' row.

- To remove the event, delete it only once where you entered it in the first place
- Those sharing in the event will have a shared event in their event list



The screenshot shows a table titled 'Events/Facts' with the following data:

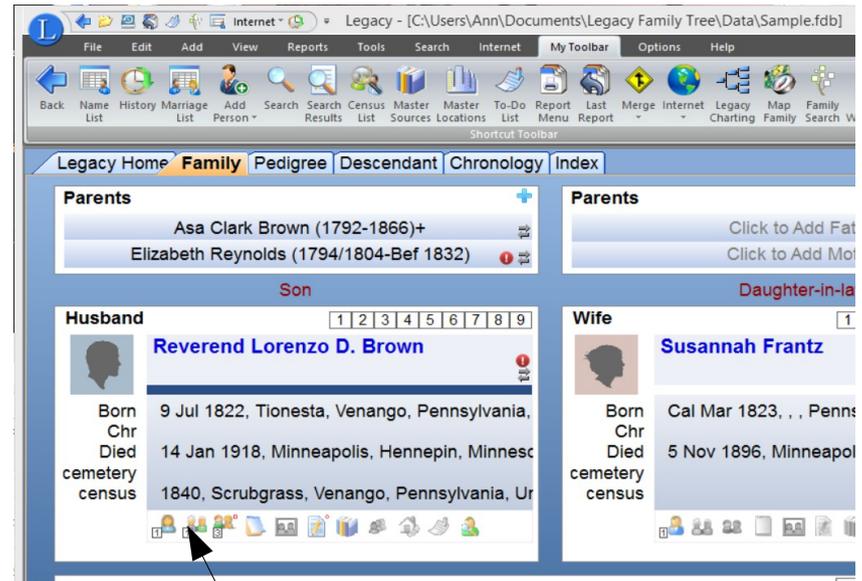
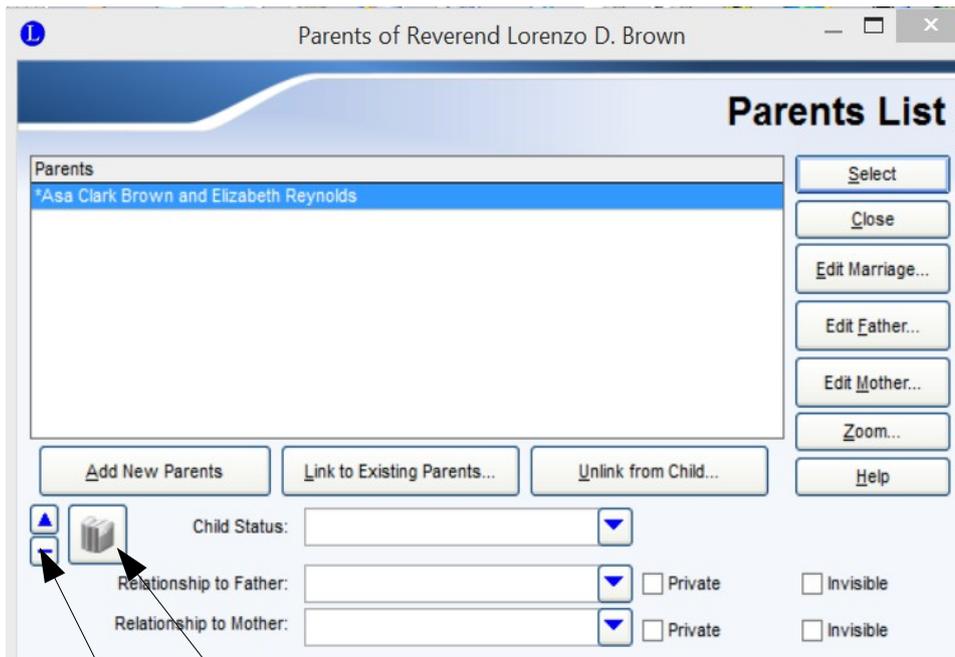
Age	Event/Fact	Date	Desc/Place/Notes	Icons
	Census-Household M	1860	Milton Frances Brown - federal / Minneapolis, Hennepin, Min	Shared icon (two people), Book icon, Error icon

Annotations with arrows:

- 'Event' points to the 'Event/Fact' column.
- 'Role' points to the 'Census-Household M' text.
- 'Event owner' points to the 'Milton Frances Brown' text.

# Document Parentage

- Click on the Parents icon
- Click on “-” or the source icon

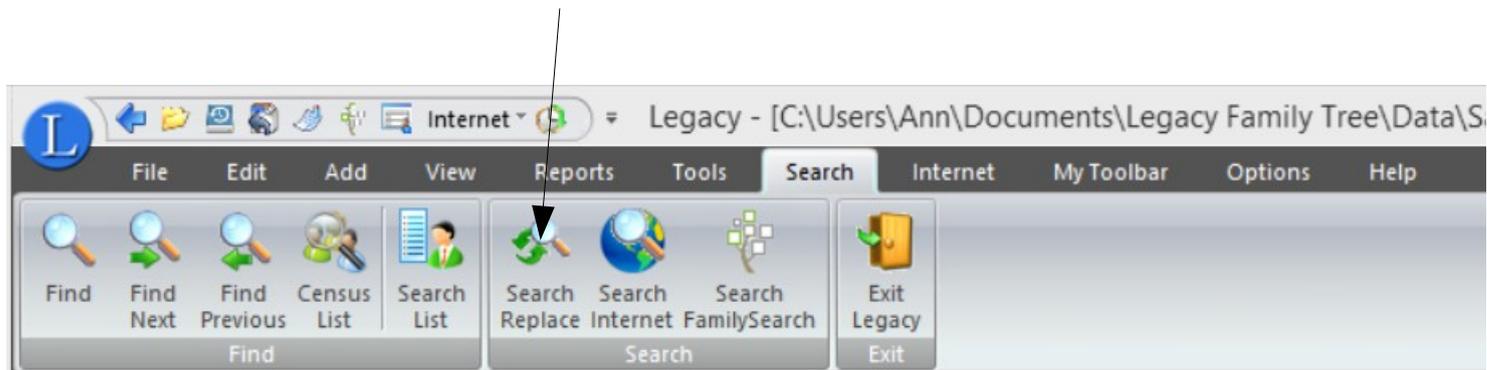


# Master Source List

- From the Master Source List page you can
  - List all individuals who use a specific citation
  - Delete all use of a specific citation
- From the Advanced Sourcing page you can
  - Assign a citation to all those with a specific tag
  - Assign a citation to all those on the current search list
- With the Source Citation report you can
  - Create a report of citations and all those who use them
  - Create a summary of how many individuals use each citation

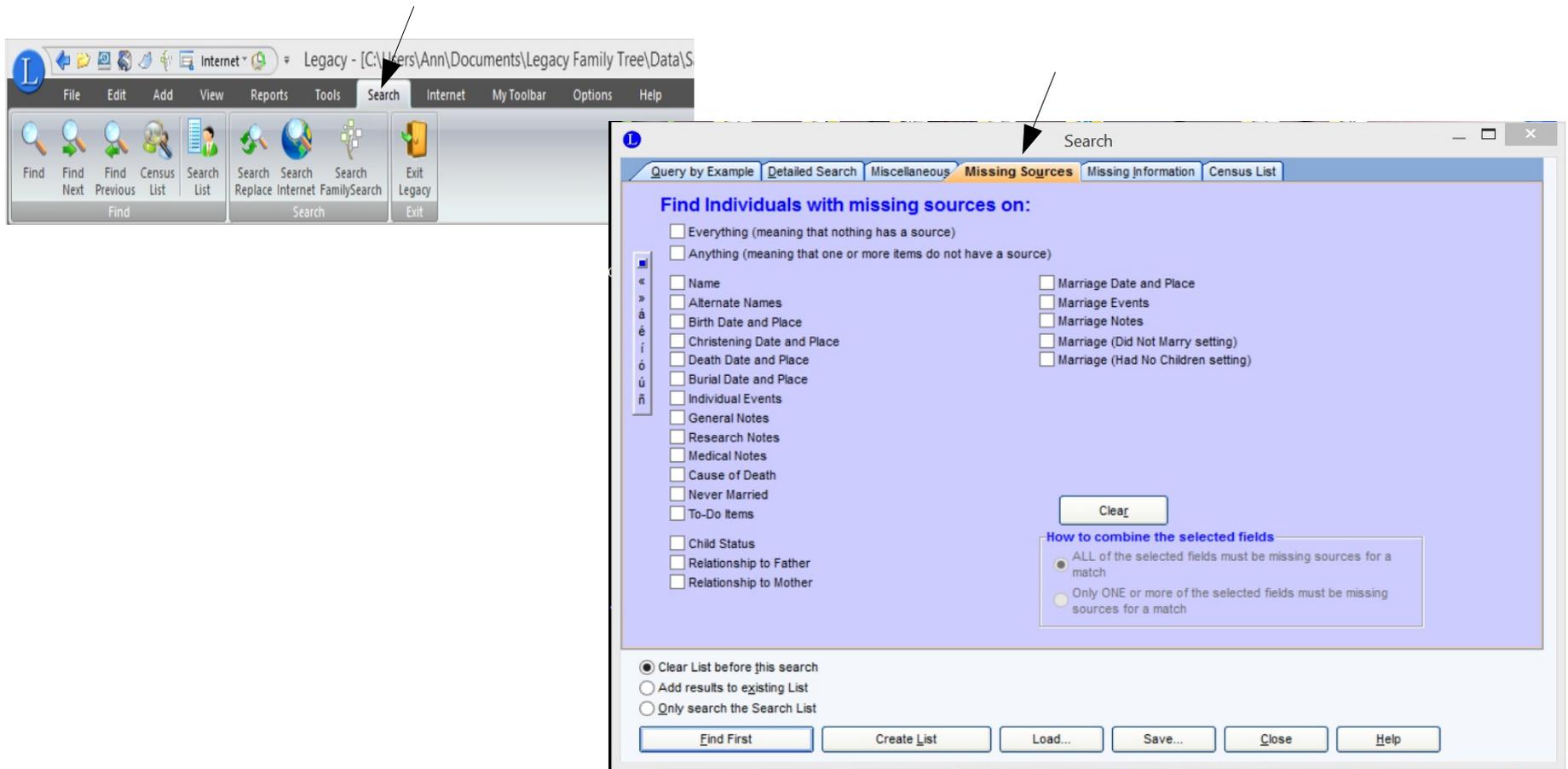
# Master Source List

- Search and Replace allows you to replace any given citation with another, across full database or for tagged individuals



# Master Source List

- You can find out where you are missing documentation with Missing Sources Search



# Master Source List

- Click on “Combine Highlighted Source...” to remove duplication