

## DOCUMENTING SOURCES IN PAF 5

### 1. How to create a new source

(a) To create a new *individual* source—that is, a source for information that is linked to an individual, such as birth, death, baptism, etc.—go to the "Edit Individual" screen for that person. (To create a new *marriage* source—that is, for information linked to the marriage or the family as a whole—begin with the "Edit Marriage" screen and follow steps that are similar to those below.)

(b) Double-click on the small "s" at the right end of the field for which you have a source. Or, if you have a general source for the individual's life, click on the "Individual Sources" button at the right of the "Edit Individual" screen. Either way, you will then see the "Select Source" screen, which shows a list of all the sources that have already been created in the database. (Please note that if any citations already exist for that event—indicated by an asterisk on the "s" or the "Individual Sources" button—then *they* will be displayed at this point instead of the source list. In that case, you need to click on the "New" button at the bottom of the "Citation" screen, which will then bring up the source list.)

(c) Click the "New" button at the bottom of the "Select Source" screen, and the "Edit Source" screen appears. Type your source information into the appropriate boxes.

(d) Click the "Repository" button on the "Edit Source" screen, and you will see a list of all the repositories in the database. If you need to add a new one, click the "Add" button at the bottom of the "Select Repository" screen, and type the information into the appropriate boxes. (See the "Source Documentation Examples" list for some examples of repositories.) When you have finished, click "OK" on the Repository screen.

(e) With the repository highlighted on the "Select Repository" screen, click the "Select" button at the bottom. (This links the repository to the source.) Notice the sample footnote at the bottom of the "Edit Source" screen, which shows you how the source will appear in a printout. Then click the "OK" button at the bottom.

(f) With your new source highlighted on the "Select Source" screen, click the "Select" button at the bottom. This links the source to the event you are documenting, and creates a "Citation" for that event. You can add "Citation Details" on that screen if you wish, and then click "OK" at the bottom.

(g) This returns you to the "Edit Individual" screen. Notice that an asterisk appears on the little "s" or on the "Individual Sources" button, indicating that you have at least one citation for that event. You can view all the sources that have been created for an individual by clicking on the "View all sources" button—the one whose icon looks like an open book—at the right of the "Edit Individual" screen.

### 2. How to use a source you have already created, from the source list

(a) On the "Edit Individual" screen, double-click the little "s" or the "Individual Sources" button as if you were going to create a new source. This brings up the "Select Source" screen, displaying the source list.

(b) Highlight the source you wish to use, by clicking on its name. Then click the "Select" button at the bottom. The computer immediately creates a citation for the new event. You can add any citation details you wish, and then click "OK" to return to the "Edit Individual" screen.

### 3. How to memorize a citation and use it for another event

(a) You can have the computer memorize a citation that you have already created, so that you can link it to another event. To do this, go first to the citation you have already created, by going to the appropriate "Edit Individual" screen and double-clicking on the "s" or the "Individual Sources" button.

(b) On the "Citation" screen, click on the "Memorize Citation" button. (This is the button to the right of the "Comments" field, showing two superimposed pages. If you let the mouse arrow rest on it for a second, a small yellow screen saying "Memorize Citation" pops up.) Then click "OK".

(c) Go to the "Edit Individual" screen where you wish to use the memorized citation, and double-click on the "s" or the "Individual Sources" button.

(d) If the event does not already have at least one citation (indicated by an asterisk), you will then see the source list. Click on the "Use Memorized Citation" button at the lower right of the "Select Source" screen to link the memorized citation to the new event.

(e) If the event already has one or more previous citations, double-clicking on the "s" or the "Individual Sources" button will take you directly to one of these previous citations. Click on the "Paste Memorized Citation" button, which is just to the right of the "Memorize Citation" button, and the new citation will be created. (The memorized citation can be pasted any number of times, to any other event or record in the database, until a new citation is memorized.)

#### **4. How to show sources on a printout**

Sources can be printed out on a Family Group Record, an Individual Summary, or a Book. On the "Reports and Charts" Menu (which is obtained by clicking the "Print Reports" icon on the toolbar), look at the "Sources and Notes Options" section and be sure that the "Source Citations" box is checked. On the printout itself, the sources will be indicated by footnotes, which refer to the numbered citations at the end of the report.

#### **5. How to edit a source directly from the source list**

Go to the Edit Menu (at the top of the screen), and click on "Source List". You will then see an alphabetical list of all the sources in the database. To edit a source, first highlight the source by clicking on its name, and then click on the "Edit" button at the bottom. Notice also that, by working directly from the source list, you can copy or delete a source or create a new one. You can work with the "Repository List" in the Edit Menu the same way.

#### **6. How to merge duplicate sources, citations, or repositories**

Go to the Tools Menu, and click on "Merge Duplicate Sources and Citations". Following the merge, a small pop-up screen will report the number of duplicate repositories, sources, and citations that have been merged. (*Please note: repositories, sources, or citations will be merged only if they are exact duplicates.*)

#### **7. How to know which names in the database have a particular source citation**

Go to the "Reports and Charts" menu by clicking the "Print Reports" icon on the toolbar. Click the "Lists" tab, and select "Citations referencing a source". Then click the "Preview" button, and the source list appears. Select a source (that is, click on the source to highlight it, and then click the "Select" button at the bottom), and a list of names and events for which that source has been cited will appear.

#### **8. How to get more information, suggestions, and examples**

(a) The User's Guide. Go to the Help Menu, and click on "User's Guide". Go to the Table of Contents at the beginning, or to the index at the end, and click on the topic you wish to examine. You will find excellent material in "Citing Sources" on pp 58-78, and "Keeping Track of Repositories" on pp 79-80. (Note especially "Guidelines for Citing Sources" on pg 58 and "Typing Source Titles" on pp 59-60.)

(b) The online help. The online help actually contains more information than the *Users Guide*, and often gives suggestions on how to solve problems. A good way to learn how to use it more effectively is to read about it on pp 16-17 of the *User's Guide*. A little bit of practice with both of these will pay rich dividends.