

## Family Tree Maker (FTM): Documenting your Research - Sources Workspace

Handout June 19, 2022 GFO Family Tree Maker Special Interest Group

FTM Companion Guide - 2017 pages 71 to 87; FTM Companion Guide 2019, pages 77 to 95

Where did I find that?

**Healthy Habit:** Each time you add information - create a source citation.

A **SOURCE:** unchanging facts about an item; for example, the author, title and publication information for a book.

- **example:** a book, author, title, publication information:  
Evidence Explained, Elizabeth Shown Mills, 2nd Edition, October 5, 2009, ISBN-10:0806318066
- **example:** a Census  
Source: 1930 United States Census  
Where: [www.ancestry.com](http://www.ancestry.com)  
Publishing details: Bureau of the Census, Washington, D.C.: National Archives and Records Administration, 1930.

**SOURCE CITATIONS:** individual details that explain where you found a fact, such as the page number in a book.

- **example:** a Census  
Source: 1930 United States Census  
Citation: Harold Reed household, Santa Clara Township, Santa Clara County, California. Roll: 219; page: 14A; Enumeration district: 110.
- **example:** same source, different individual  
Source: 1930 United States Census  
Citation: Michael Reed household, Kokomo Township, Beaver County, Oklahoma. Roll: 1891; Page 5B; Enumeration district: 26.

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**CREATING SOURCES:** several ways to create or edit sources in the People and Sources Workspace

- Import from [ancestry.com](http://ancestry.com) or [familysearch.org](http://familysearch.org) or another website
- Source Templates: 170 in FTM based on Elizabeth Shown Mills's 'Evidence Explained'
- Basic Format - you fill in the blanks

**Sources Workspace** (FTM 2017, pg 20; FTM 2019, pg 23)

**Left panel:** sort sources by person, title and repository, or history

- **Groups pane** (bottom of left panel, dropdown list)
  - By All Source Citations: displays each source citation you've entered
  - By Source title: displays the sources in the Groups list. When you select a source, the source citations associated with that source are displayed in the source citations list.
  - By Repository: displays all of the repositories in the Source Groups list. All of the source citations linked to that repository are displayed in the source citations list.
  - By Person: displays all of the people in the tree. An 'icon' marks the people that have a linked source citation. When you select a person, the linked citations are displayed in the source citations lists.
- **History pane** (bottom of left panel)
  - sorted in the order you added the sources
  - view the changes made to a source: move the pointer over the source name; a box will open listing date, time and changes made

**Sources display area:** shows citations entered for a specific source

**Tabs at the bottom of window:** shows individual link to source citation, related notes and media items

**Source Citation Information** (right, editing panel): enter or update specific source citations

**Adding a Source for a Fact** in the People Workspace (FTM 2017, page 71; FTM 2019, page 79)

Note: Create only one source for each item; use a source for as many source citations as necessary

- People workspace - **Tree** tab - Person tab
- editing panel (right panel): click the **New** source Citation; choose **Add new Source Citation** from drop-down list
- next step: create a source from a template or Basic format

### **Adding a Source in the Source Workspace**

- **Creating a Source from a Template** (FTM 2017, page 72-73-74; FTM 2019, page 80-83)  
enter keywords and choose from a list of suggestions, or,  
view a list of all available templates and choose the one that fits best.
  - **Creating a Source Using the Basic Format** (FTM 2017, page 75-76; FTM 2019, page 83-84)  
if you don't want to use a source template, create a source by completing standards fields
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### **CREATING SOURCE CITATIONS** (People Workspace) FTM 2017, page 77 - 81; FTM 2019, page 85 - 89

Each time you add a fact to your tree; record where you found the source and link the source to the fact.

It is possible to have one source citation for the same fact

### **Adding a new Source Citation** (FTM 2017, page 77 - 78; FTM 2019, page 85 - 86)

- **Path to Access the Add Source Citation dialog:** People workspace, select the person, right panel "sources" tab, select **New Source Citation**
- Change the citation as necessary: Source title - Citation detail - Citation text - Web address: for online sources  
- Include a reference note - include a media item or note

### **Linking a Fact to an Existing Source Citation** (FTM 2017, page 78 - 79; FTM 2019, page 86 - 88)

- a previously created citation for a source
- you don't have to create a another source citation for each fact or individual in the source
- **Path:** People workspace - "sources" tab, select 'Use existing Source Citation' - 'Find Source citation' - click the citation - click 'Link to citation'

### **Copying and Updating a Source Citation** (FTM 2017, page 80 - 81; FTM 2019, page 88 - 89)

- if you need to create a source citation that is similar to one already in your tree, don't take a new citation
- copy the old citation and update details as necessary  
for example, copy and update the source citation for other families members in directory
- **Path:** People workspace, person tab - click the fact - Sources tab of the editing panel - choose **Use Existing Source Citation** - click the citation you want to copy - click 'Create New Copy' (lower left corner of screen) - a citation link appears in the Sources tab - edit the citation without affecting the original - double-click the source citation to open an editing dialog window; make the necessary changes and click OK.

### **Attaching a Media Item to a Source Citation** (FTM 2017, page 81 - 82; FTM 2019, page 90)

- click 'Media' tab
  - Do one of the following:
    - **path:** Media Item in your tree - click **Link to Existing Media** (in the FTM program) - click the item you want then click **OK**
    - **path:** add a media item - click **Attach New Media** (in computer documents) - locate the media item and click **Open**
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### **SOURCES REPORTS** (Publish Workspace) FTM 2017, pages 186 - 188; FTM 2019, page 202 – 204

- **Source Usage Report:** lists all of the sources, repositories and citations that you have used in your tree.
- **Source Bibliography:** lists all of the sources defined in the tree
- **Documented facts:** lists all of the events in your tree for which you have source information
- **Undocumented facts:**
  - > lists all of the events in your tree for which you do not have source information.
  - > This report can help you quickly determine where you need to focus your research for verification of facts
  - > you can limit the report to certain individuals