A Custom Universal Source Type for all Books

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This article pertains to the custom source types offered by Wholly Genes Software in their genealogy software package, The Master Genealogist (TMG), version 6. The word "source" refers to "where" you got a specific piece of information. Many different source types are used in genealogy, including books, record groups, microfilms, CD-ROMs, cemetery markers, interviews, letters, etc.

The universal custom book source type we offer here is based on Wholly Genes' implementation of their interpretation of the various book source types defined by Elizabeth Shown Mills in her book, *Evidence!* . . . [1]. This single new book source type is meant to simplify our source citation task by working equally well for all book source types. As seen in the table below, Wholly Genes have defined different source templates for twelve of the nineteen templates defined in Mills' book. The templates that were not copied seem to me to be the ones that would be least often called for.

Different Source Templates for Books

#	Elizabeth Shown Mills' book	TMG
1	Book (authored)	1
2	Book (authored by an agency)	2
3	Book (compiled records)	3
4	Book (edited)	4
5	Book (multi-authored)	5
6	Book (multi-volume)	6
7	Book (multi-volume, compendium)	7
8	Book (one of a series)	8
9	Book (paginated, with numbered entries)	9
10	Book (reprint)	10
11	Book (revised edition)	11
12	Book chapter	12
13	Book (author unidentified but known)	
14	Book (author unknown)	
15	Book (pagination not given)	
16	Book (privately printed)	
17	Book (publication date not given)	
18	Book (publication place not given)	
19	Book (publisher not given)	

The following book source types are included in the template: books, pamphlets etc. including multi-volume series, reprints or revised editions; and with "authorship" by a single personal author, anonymous author, corporate author, or multiple authors, including compilations and edited volumes.

The new source type is named " .Book (all types) ". The name starts with a period, which is our convention for naming all custom source types. These periods put all of the custom source types at the top of the source types list, while still keeping them in alphabetical order, when the period is ignored.

The recommended steps in creating the new source type are:

1.   If this has not already been done, choose the custom sources category using: *File > Preferences > Current Project> Other > set source categories to custom.*

2.   Design the format on paper, and define what goes in each field.

Example of Full Footnote sentence:
John Smith, compiler, *Ontario Deaths in the Home District, 1835 to 1858,* 2nd edn, (Toronto: OGS, 2002); page 22.

Format for Full Footnote for new source type,   .Book (all types)
<[AUTHOR],> <[WRITER ROLE],> [ITAL:][TITLE][:ITAL]<, [VOL/SER/EDN]>
 (<[PUBLISHER ADDRESS]:> <[PUBLISHER] > <,[PUBLISH DATE]>) ; <[CALL NUMBER]> <, [CD]> . <Hereinafter cited as [SHORT TITLE]>   <Held in the [REPOSITORY].> < [COMMENTS] . >

Contents of Source Elements (Fields) :
[AUTHOR]   personal author(s), agency author, "Anonymous" or names of editor(s) or compiler(s). By entering the name as "Surname, GivenName", you cause TMG to output the correct form for the name in all three reference modes: "GivenName Surname" for the full footnote, "Surname" for the short footnote, and "Surname, GivenName" for the Bibliographic reference. For multiple authors these outputs cannot be made exactly correct without overridding the format.
[WRITER ROLE]   editor(s), compiler(s), [leave out if personal or corporate author].
[VOL/SER/EDN]   is to be used as needed. For example, "vol. 2 of 4", "Carleton County History Series", or "2nd edition" .
[PUBLISHER]   publisher, or "privately printed"
[CALL NUMBER]   only used for library books.
[CD]   page numbers, line numbers and/or numbered entry as applicable. The [CD] field is used since a book may be referenced more than once.
[SHORT TITLE]   a short version of the book title (or the whole title, if brief).
[COMMENTS]   anything else needed, such as a discussion of the reliability & completeness of the source; a description of a previous book or article now reprinted, an author & chapter title for a chapter from an edited or compiled book.

In this full footnote template, the text "<Hereinafter cited as [SHORT TITLE]>" is used by TMG but not Mills. The text "<Held in the [REPOSITORY].>" is a section introduced by myself, and is not part of the format of either TMG or Mills. Naming the repository is common in most of TMG's other source types.

There are so many combinations of information that you might or might not have, that it is impossible to get all the punctuation right in all cases – depending on what's missing, there might be a shortage or surplus of commas or periods. These less common cases are easily dealt with using the format override for individual sources.

3.	Decide what new source elements need to be created. In this case, [WRITER ROLE] and [VOL/SER/EDN] are the two new elements.

4.	Find suitable source element <u>groups</u> not yet in use in your template to put the new source elements into. In this case it is easy, since [WRITER ROLE] obviously belongs in the Editor group, which has not yet been used, and [VOL/SER/EDN] belongs in the Volumes group, which has also not yet been used.

5.	Create the elements in the proper groups using *Tools > Source Elements > Add > type name of new element* .

6.	Create the new source template using *Tools > Source Types > Add > enter name of new source type* .

7.	In the rare cases where the data doesn't fit your template exactly, use the Format over-ride feature for that particular source.

8.	The short footnote template is the same as in TMG, except that it uses conditional brackets around every element other than [SHORT TITLE]:
 <[AUTHOR], >[ITAL:][SHORT TITLE][:ITAL]<, [CD]>.

9.	The bibliographic reference is the same as in TMG, except that it uses conditional brackets around every element other than [TITLE]:
<[AUTHOR]. ><[WRITER ROLE], >[ITAL:][TITLE][:ITAL].< [VOL/SER/EDN]. >
<[PUBLISHER ADDRESS]: ><[PUBLISHER]><, [PUBLISH DATE]>.

For more detailed advice, see Jim Byram's excellent essay on "sources" found in [2].
In particular, he explains how to copy custom source types from one project to another.

<u>References</u>
1.	Elizabeth Shown Mills, *Evidence! Citation & Analysis for the Family Historian* (Baltimore, MD: Genealogical Publishing Company, 1997), 66 – 71.

2.	Jim Byram, "Chapter 7 – Sources," in *Getting the Most Out of The Master Genealogist,* Lee H. Hoffman, compiler & editor (Baltimore, MD: Gateway Press, Inc., 2003), 90 – 108.