Introduction
The underlying principles behind Evidence Explained by Elizabeth Shown Mills\(^1\) are difficult to identify without lengthy study. This presentation hopes to identify those principles for the benefit of record publishers (citation creators) and tree vendors (citation consumers).

The 170 templates in Evidence Explained are insufficient for the average user, but it is difficult to extrapolate other templates without an understanding of the underlying principles.

Evidence Explained Templates

Templates in Evidence Explained do not show every record type in the book and don’t show every combination of record type (birth, marriage, death, land, etc.) and record media (online, on film, on CD, on location, etc.). Take the U.S. census. This table shows the page numbers of examples Mills gives for various combinations of census year and record media. Asterisks mark template examples.

<table>
<thead>
<tr>
<th>Media</th>
<th>1790</th>
<th>1800</th>
<th>1810-1840</th>
<th>1850</th>
<th>1860</th>
<th>1870</th>
<th>1880</th>
<th>1890-1930</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>268</td>
<td>271</td>
<td>277</td>
<td></td>
<td></td>
<td></td>
<td>280</td>
<td></td>
</tr>
<tr>
<td>On film</td>
<td>270</td>
<td></td>
<td>247*, …</td>
<td>251*</td>
<td>278</td>
<td>248*</td>
<td>279</td>
<td>250*, …</td>
</tr>
<tr>
<td>On CD/DVD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>239*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>On location</td>
<td>266</td>
<td>238*</td>
<td></td>
<td>237*</td>
<td></td>
<td></td>
<td></td>
<td>283</td>
</tr>
</tbody>
</table>

Tree vendors could better serve users by allowing users to separately specify record type and media.

Axioms

Citations serve two major purposes:

1. Specify the location of the source, and
2. Characterize its strength.

Genealogists could use any citation style guide were it not for their dependence on manuscript sources. Elizabeth Shown Mills has extended the Chicago Manual of Style (CMOS) with principles, templates and examples for manuscript sources and copies of manuscript sources. As the only style guide that does so, Evidence Explained is the only citation style guide that fulfills the two major purposes of citations.
Meeting these two axiomatic purposes can be impossible for users. Users cannot identify the source of an online collection unless told. Users can not be expected to specify the location elements of manuscripts in archives they have not visited. Nor do most users understand how to characterize the strength of a source. Publishers must provide citations and tree vendors must guide citation creation.

Citation Formats

Any citation can take one of four basic formats:

- Reference notes can be either footnotes or endnotes. Reference note format is the only format used or needed by the vast majority of genealogists. It is used for the examples in this syllabus. It would serve users well if when they entered this format, the software automatically derived the other forms.
- Subsequent (or short) notes are shortened reference notes used in narratives and reports when sources are used multiple times.
- Source labels are the form of citations displayed and printed with records or images. Mills style does not specify the format. I prefer reference note format because source lists do not preserve the nuance between reference note commas and semicolons.
- Source list citations are the individual citations found in source lists (aka bibliographies). Conversion from reference note to source list entry is usually as easy as changing commas to periods. This is because reference notes are punctuated as sentences and source list entries are punctuated as paragraphs. As reports do not utilize a source list, users publishing narrative genealogies are the only ones needing source list format.

Basic Model: Citing Parts of a Whole

Many citations are built on a common model: citing parts of a published whole. This model is exemplified in the citation of authored book chapters. Leave out default values or redundant elements.

<table>
<thead>
<tr>
<th>Model</th>
<th>Author</th>
<th>Online Database</th>
<th>Blog</th>
<th>Bound Syllabus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creator of part</td>
<td>Chapter author</td>
<td>Often redundant</td>
<td>Post author</td>
<td>Presenter</td>
</tr>
<tr>
<td>“Title of Part”</td>
<td>“Chapter Title”</td>
<td>“Collection Title”</td>
<td>“Post Title”</td>
<td>“Presentation Title”</td>
</tr>
<tr>
<td>Part type</td>
<td>Chapter is default</td>
<td>Database type</td>
<td>Post is default</td>
<td>Default</td>
</tr>
<tr>
<td>Creator of whole</td>
<td>Book editor</td>
<td>Redundant</td>
<td>Creator of blog</td>
<td>Conference</td>
</tr>
<tr>
<td>Creator’s role</td>
<td>Editor</td>
<td>n.a.</td>
<td>Creator is default</td>
<td>Compiler is default</td>
</tr>
<tr>
<td>Title of Whole</td>
<td>Book Title, edition</td>
<td>Website Title</td>
<td>Blog Title, date</td>
<td>Syllabus Title</td>
</tr>
<tr>
<td>Where published</td>
<td>Publication place</td>
<td>URL</td>
<td>URL</td>
<td>Publication place</td>
</tr>
<tr>
<td>Who published</td>
<td>Publisher</td>
<td>Redundant</td>
<td>Often redundant</td>
<td>Publisher</td>
</tr>
<tr>
<td>When published</td>
<td>Publication year</td>
<td>Pub. or update date</td>
<td>Accessed date</td>
<td>Publication year</td>
</tr>
<tr>
<td>Location within</td>
<td>Page numbers</td>
<td>Page number equivalent</td>
<td>Specific content</td>
<td>Page numbers</td>
</tr>
</tbody>
</table>
Page Number Equivalents
Page numbers guide users to pages within books. In like manner, page number equivalents guide users to records within record collections.

For indexed collections, specify values used to search for and uniquely identify records from among search results. In the Lyndon Baines Johnson examples above, the page number equivalent is “Lyndon Baines Johnson, died 22 January 1973.” For images, specify the hierarchy navigated. While a human created citation would include information derived from the image, machine generated citations are limited to the available metadata.

Punctuation
Punctuation rules are the same as for regular English. Commas bind most tightly, followed by semicolons, and lastly by periods. This is because reference notes are punctuated as sentences and source list entries are punctuated as paragraphs.

Derivatives
Genealogists can seldom visit the archives housing the many manuscript sources they use. Consequently, they must depend upon copies. Copies, be they textual (index, transcript, etc.) or image (digital, microfilm, etc.) are called derivatives. Citations of derivative sources must specify the location and strength of both the derivative and the original.

[citation to the derivative]; from [citation to the original].

Separate the two citations with a semicolon, optionally followed by a connecting word like “from.” The “from” can be omitted or changed as appropriate.

Consider this example:


Here are the two citations, separated onto separate lines:


For image derivatives, Mills Style allows switching the two citations, leading with the citation to the original.

Citing Large Archives
Large archives often organize sources into hierarchies and citations match this. Large archives often specify how they wish their sources cited.

Citations to hierarchical sources must also be hierarchical. Here is one possible way an archive might organize its holdings: All holdings are divided into collections which are divided into
record groups divided into series divided into boxes divided into folders containing individual items. This is but one of many possible hierarchies.

In the United States, hierarchical levels are typically cited smallest to largest. Separate each hierarchical level with a comma, or a semicolon when levels have embedded commas.

CONCLUSION

Understanding citation principles allows vendors to better fill user needs, offering a greater range of citations than encapsulated in Evidence Explained’s 170 templates.

2. Some vendors use the term database to distinguish a set of records. Herein collection is used.
7. The order of elements in Mills Style, which I’ve shown, is slightly different than chaptered books, which is (book title, creator’s role, book creator). Mills prefers consistency between the part and the whole.
8. Mills, Evidence Explained, sections 2.55-2.76.
10. Board for Certification of Genealogists, The BCG Genealogical Standards Manual, ed. Helen F. M. Leary (Provo, Utah: Ancestry, 2000), 9. Also Mills, Evidence Explained, 24. On page 47 Mills says our citation must “distinguish between image copies and other derivatives, such as abstracts, transcripts, and information extracted into databases.” I’ve introduced the term textual derivative to describe these “other derivatives.”
12. Mills, Evidence Explained, 240-2. For other examples, search Evidence Explained for “; digital image”.