

CITATION RULES

FOR MACHINE-READABLE DATA IN CANADIAN HISTORICAL JOURNALS

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At its June 7, 1993 business meeting, the Canadian Committee for History and Computing has adopted the following citation rules for machine-readable data in Canadian historical journals. The committee hopes that journal editors in turn adopt these rules and make them known to their contributors.

I. Goals

The purpose of these rules is to define a method of citation for machine-readable data that provides rules similar to those that apply to traditional sources, in order to adapt the historians' scholarly apparatus to the new kinds of sources used in the process of historical enquiry.

As well, these rules allow for scholarly recognition of the scientific work involved in the creation and distribution of data bases of historical material, as the practice already exists in other disciplines.¹

Finally, the adoption of these rules will enable researchers to meet the requirements of funding agencies (among which the Social Sciences and Humanities Research Council of Canada) that data made machine-readable through their funding be made available to the scholarly community.

II. Three Types of Situations

A. Authors use data bases created and distributed by other scholars, by research organizations or by commercial enterprises.

References to such data should be made according to the rules defined below.

B. Authors make use of data that they have made machine-readable and these data are accessible to other scholars, under conditions set by the authors; access is available through the authors themselves or through a third party (traditional archives, data libraries, research groups or other organizations).

Making the data accessible should be considered a form of publication; data thus "published" are to be cited according to the rule defined below.

Authors are strongly encouraged to turn over to an

organization (department, research centre, archives, or other) the functions of producer and distributor for their machine-readable data, under such stipulations as are agreeable to both parties.

C. Authors make use of machine-readable data in the same way as they do research notes on paper and are under no obligation to make their machine-readable accessible to others.

In this situation authors should make reference to the original sources from which machine-readable notes are made. Any substantial transformation of the raw data are explained, either in the body of the published material or in a note, according to the place taken by such data in the argument presented. For instance, one should explain the method by which occupational titles have been classified into categories.

III. Citation Rules²

As much as possible, the information given in references should be taken from the machine-readable document itself or from accompanying documentation.

1. Author: cite in the usual manner.
2. Title: title of the data file or of the data base.³
3. Machine-readable documents: to indicate that the document is machine-readable, write the words "[computer file]", in square brackets without using any acronyms.
4. Statement of responsibility, where applicable, "This indicates the responsibility of the person(s) or corporate body named as principal investigator or of other significant parties, such as the department, funding agency, or sponsoring organization."⁴
5. Edition, series, or version, if indicated
6. Place of production, name of producer, followed by "[producer]", date of production.
7. Place of distribution, name of distributor, followed by "[distributor]", date of distribution.
8. Collection, where indicated.
9. The following additional information may be added:
 - a. A brief description of contents, within square brackets, if the title does not give sufficient information on this score.

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b. Material designation in square brackets; for instance:

[on-line database]
[magnetic tape]
[floppy disk]
[CD-ROM]

c. If the database is periodically updated, give the date when the database was used.

10. Outline conditions governing access, where applicable.

Some examples:

- Centre interuniversitaire de recherche sur les populations SOREP, *Base de données SAGUENAY* [computer file], SOREP, Chicoutimi: Université du Québec à Chicoutimi, 1992, [on-line database] accessible for research purposes, subject to approval by the SOREP ethics committee.
- *CANSIM University Base* [computer file], Ottawa: Statistics Canada, 1992 [magnetic tape].
- *Science Citation Index* [computer file], Philadelphia: Institute for Scientific Information, 1989 [CD-ROM].
- IGARTUA, José E., *Base de données MEMBERS2* [list of members of the Canadian Committee for History and Computing] [computer file] Montréal:

Département d'histoire, Université du Québec à Montréal, 1992, [on-line database] accessible through the author upon request.

Notes:

¹ See for instance the "Notice to Contributors" in the *American Sociological Review*, 57, 1 (February 1992): iii-iv.

² The citation rules outlined here follow those defined by Terry Cook et al., *Archival Citations: Suggestions for the Citation of Documents at the Public Archives of Canada* (Ottawa: Public Archives of Canada, 1983), 13-14. See also Danielle Thibault, *Bibliographic Citation Guide* (Ottawa: National Library of Canada, 1989), 102-103. One may also consult the rules defined by the *American Sociological Review*, as well as the cataloguing methods used in the *Canadian Union List of Machine Readable Data Files* (CULDAT), produced by Edward H. Hanis and described in Edward H. Hanis, "Reference and User Guide for the CULDAT Information System" (London, Ont.: January 1990). The CULDAT project was sponsored by the Government Archives Division of the National Archives of Canada.

³ A database is a set of data files linked together by a logical structure.

⁴ Cook, ed., *Archival Citations*, 13. ■

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If you are looking for a note, on a certain person for example, simply type in the person's name and hit a key. The program rapidly searches through your notes, most often hundreds of pages, and retrieves the note(s) that contain(s) the name in a matter of seconds; the exact speed depends on the amount of information in the database and the speed of your computer. Similarly, you can search for any word, number, or combination. Better yet, you can sort the notes into different groups depending on your purpose. If you wanted all the notes on the subject of railways, type in railways and hit a key. You can be even more specific and ask for notes on railways in eastern Canada. Also, you can reorder the notes to your liking. I often shift mine into chronological order, but you can also order them by

subject, author, source, etc., all depending on the type of information you've entered and the fields you've created.

Once you've sorted and reordered your notes you can print them. When printing you can decide to print the entire database, ie. all of your notes, or only select sub-groups. You can also customize a printing format for your own needs by setting the margins, the order of printing, the print size, and many other options. And, as mentioned above, you can print as many copies as often as you want. But even more importantly, you can also transfer your notes directly into your wordprocessor. I find this extremely useful for making fast, detailed outlines. I choose the notes for my topic from the database, reorder them to suit my needs, and then transfer them into my