



Cite-Builder.com User Guide

Version 3.0 (26th January 2025)

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Cite-Builder Terminology

"Template"

A collection of fields (where we prompt you for information) and definitions used to create citations for a particular type of source (and sometimes the specific repository where it has been located). The Templates are all created by Cite-Builder admins.

"Template Set"

A number of Templates and/or Template Sets grouped together – usually the sources have a common theme.

"Style"

The particular structure and appearance in which the citation is created, as defined by an academic body (e.g. University of Strathclyde, Harvard), a repository or an heavily-referenced citing guide (Evidence Explained).

"Format"

Variations of the citation to be used in different contexts: i.e. Bibliography, 1st footnote, subsequent footnotes.

"Personal Template"

These are user-created copies of "Templates", which the user has partially pre-filled with information in order to speed up subsequent citations for similar sources.

"Favourites"

These are user-stored lists of frequently-used field-values, specific to each fieldname, that can be used across multiple Templates or Personal Templates. For example, Surnames, Places or Church Names.

Overview: Basic and Premium versions

There are two versions of Cite-Builder: Basic and Premium.

- The Basic (free) version has all the core citation generating functionality, and a partial set of sources encoded into the system by the Cite-Builder admins.
- The Premium (subscription) version has all the core functionality and ALL of the available sources, but also has some powerful additional features:
 - Personal Templates
 - Favourites
 - Template Search
 - Pins

Both versions are accessed from the main Cite-Builder.com home page (<https://cite-builder.com> < <https://cite-builder.com>>) or via these direct links:

<https://cite-builder.com/basic/> < <https://cite-builder.com/basic/>>

<https://cite-builder.com/premium/> < <https://cite-builder.com/premium/>>

The screenshot shows the Cite-Builder.com website interface. At the top is the logo and navigation menu. Below the navigation menu is a grid of three main sections:

- Basic Version:** A blue box with a quote icon, labeled "Basic Version Free! Click here to try it". Below it, text describes access to limited sources and lists various citation styles like Evidence Explained, Chicago, Harvard, etc. It also mentions major changes from October 2023.
- Premium Version:** A purple box with a quote icon, labeled "Premium Version Click here to access (or Subscribe)". Below it, a list of additional features is provided, such as "Over 490 citation styles", "Rules Search", "Personal Templates", "Favourites", and import/export options. A purple button at the bottom says "Subscribe to Premium Membership AUD 30/year (Approx USD 20/GBP 16 per year)".
- Additional Features:** A grey box containing icons and links for "Subscribe to our Mailing List", "Watch Overview and Demo Videos", "Cite-Builder page on Facebook", "Cite-Builder Users Group", and "Cite-Builder YouTube Channel".

At the bottom of the page, there is a note: "We are constantly adding more source types and citation styles. There are so many to consider, so if you see something missing that you need please email us using the address on the [Contact us](#) page." followed by a Facebook icon.

This guide covers both versions, but makes it clear where we are describing Premium features.

Joining the Mailing List

We recommend you join the mailing list in order to receive updates and potential future offers. We commit to not use this mailing list for any purpose other than Cite-Builder.com.

If you sign-up as a Premium member you can opt-in to our mailing list as part of the sign-up process.

As a Basic user, or if you initially opted-out of the list when you signed-up for Premium and now want to opt-in, you can join the mailing list by clicking the grey *Subscribe to our mailing list* button on the main Cite-Builder.com [page < https://cite-builder.com >](https://cite-builder.com) and follow the onscreen instructions.



Subscribing to Premium membership

If you wish to sign-up for the annual Premium membership, simply click on the *Subscribe* button on the main Cite-Builder.com home page, or this link: <https://cite-builder.com/register/premium/> < <https://cite-builder.com/register/premium/>>. Follow the onscreen instructions to complete your details to create your account and enter your payment details via the secure Stripe gateway. If you have a discount coupon, be sure to enter the details as you sign-up!

As part of the sign-up, you are asked to opt-in to our mailing list. We recommend you do so, in order to receive updates and potential future offers.

Logging in to access the Premium version

Once you are a Premium member, you will need to log in using the username and password you created when you sign-up. Click the Log In option in the main Cite-Builder banner at the top of the page.

A screenshot of the Cite-Builder.com website's login page. The top banner is light blue and contains the Cite-Builder.com logo on the left and a navigation menu on the right with links for Home, Basic (free), Premium, User Guide, FAQ, Videos, Contact, Account, and Log In. Below the banner, there are input fields for Username and Password, a "Remember Me" checkbox, a "Log In" button, and a "Forgot Password" link. At the bottom of the page, there is a secondary navigation menu with links for Home, User Guide, Videos, Contact, Privacy Policy, and a Facebook icon.

Forgotten your Premium membership password?

No problem. Click the Forgot Password link on the login screen and follow the onscreen instructions to reset.

Contact us

Have a problem, or a suggestion? Maybe a request for an additional Template or style, or to suggestion a change to an existing Template? You can contact us via email by clicking the Contact option in the top banner menu, or by emailing us direct to admin@cite-builder.com.

Note we are based in Sydney, Australia (UTC+10, +1 hour for daylight savings approx. October-April) so our response may be a little delayed. However, we will attempt to initially reply within 24 hours. Please note that it may take us longer to actually fulfill your request or answer your question, depending on the complexity and our workload.

Social Media

We'd love you to like and follow us on Facebook <https://www.facebook.com/CiteBuilderDotCom/> < <https://www.facebook.com/CiteBuilderDotCom/>> and share with your fellow genealogists!

You can also join our Facebook Group called [Cite-Builder Users](https://www.facebook.com/groups/citebuilderusers). < <https://www.facebook.com/groups/citebuilderusers>>

Right, that's all the boring stuff over with. Let's get on to how to actually use Cite-Builder!

Navigating the Templates hierarchy

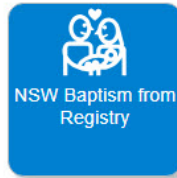
Cite-Builder citation sources are organised in a hierarchy of Templates and Template Groups. Template Groups are sets of Templates and/or other Template Groups.

From the top-level of the hierarchy, you can navigate down to the specific Template you want to use by clicking on the Template Group buttons to open and display the contents of that Template Group, until you see the Templates you want.

Template Groups are blue buttons, with a small white triangle or arrow-head at the bottom:



Templates look very similar, but have no arrow-head:



If a Template has padlock icon in a purple circle at the bottom, it is restricted to use by Premium subscribers only.



Personal Templates (Premium feature) are violet in colour and also have no arrow-head:

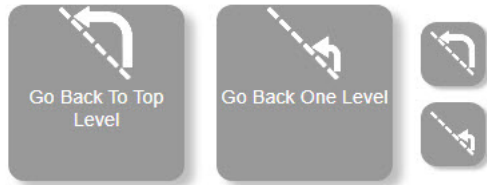


Note that there is no hierarchy to Personal Templates. All your Personal Templates are at the Top Level for easy access. Personal Templates are a Premium feature. See [Personal Templates \(Premium feature\)](#) for more details.

When you are browsing down through the hierarchy, you will see a breadcrumb trail below the main page banner. This shows you where in the hierarchy you are, and enables you to navigate back up to higher levels in the hierarchy by clicking on the underlined Template Group name, or Top Level :

The screenshot shows the top of the Cite-Builder.com website. On the left is the logo with the text "Cite-Builder.com The Citation Generator for Genealogists". To the right is a navigation menu with links: Home, Basic (free), Premium, User Guide, FAQ, Videos, Contact, Account, and Log Out. Below the navigation menu is a breadcrumb trail: Top Level > Censuses and Musters > United States.

If you are not at the Top Level, then you will also see a couple of grey navigation buttons below the Template Groups/Templates, and also smaller versions duplicated in a sidebar on the left-hand side of the screen for easier access. As their names suggest, these buttons take you back up one level or to the top level respectively.



If you are using the Premium version, then you also have the option of navigating to a Template by using the Template Search feature. See [Template Search \(Premium feature\)](#).

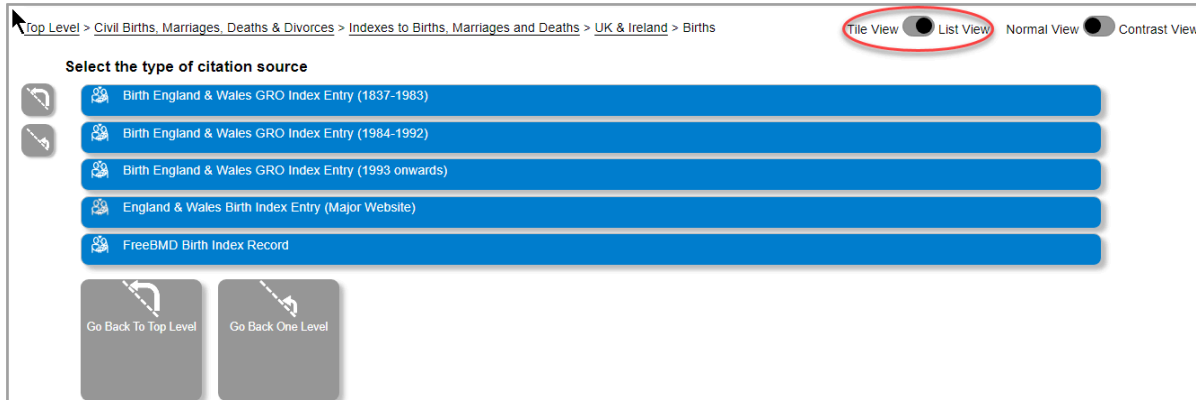
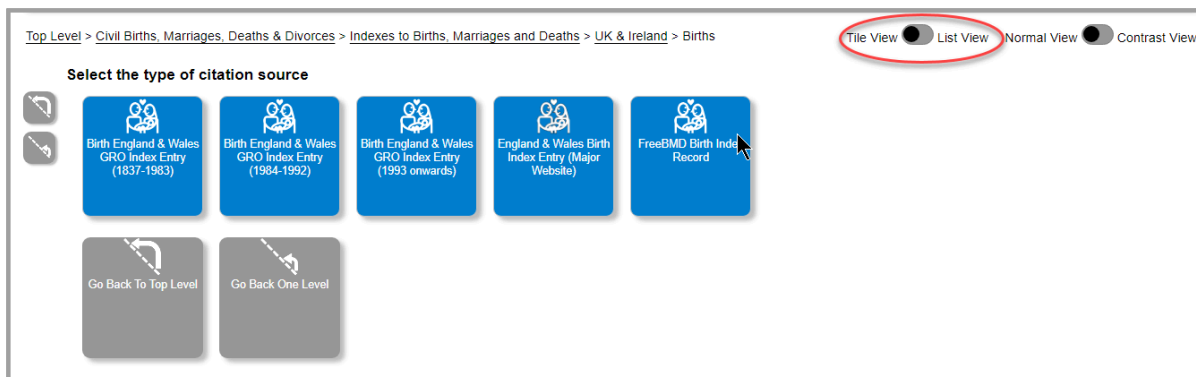
Important: Your Browser back button will NOT take you back up a level, as Cite-Builder is implemented as a single-page. Be careful not to click the back button unless you want to jump out of Cite-Builder!

Finally, again if you are using the Premium version, then you also have the option of "pinning" a Template or a Template Group to the top of the page on which it appears to make it easier to find when there are a lot of Templates or Template Groups on that page. See [Pins \(Premium feature\)](#).

Display Options

List View

In addition to the default view that displays Templates, Template Groups and Personal Templates as buttons (which we call "Tile View"), there is also a "List View" available. This view is useful if you have customised your browser settings to use larger font sizes, which might make the text in the buttons harder to fit into the space we have allotted in the buttons. In these circumstances, a scroll bar is added to the button so you can scroll to see the full name of the Template, Template Group or Personal Template. But sometimes it will just be more convenient to switch to List View. In List View, where one Template, Personal Template or Template Group is displayed per line, and therefore there is more room to include the full text. You can toggle between Tile View and List View by clicking on the toggle switch in the top right of the page.



Contrast View

Another option when navigating Templates, Template Groups and Personal Templates is "Contrast View". This displays the Templates, Template Groups and Personal Templates without the coloured background and with black text. Some people may find this easier to read. You can toggle between Contrast View and Normal View by clicking on the toggle switch in the top right of the page.



Note: You can combine Contrast and Tile Views.



Creating a citation

Once you have navigated to the Template you want to use (either by navigating down through the template hierarchy or using the **Template Search (Premium feature)**) you are presented with a page similar to the following:

To create the citation:

1. Click the tab to select the citation style you require. In this example, there are three styles available ("Evidence Explained", "Strathclyde" and "UTAS") but this will vary by Template.
2. Enter the information prompted for in the form. Note that fields with dashed red borders are optional, but all other fields are mandatory for the selected style.
3. Click the black *Build Citation* button to generate the citation.

Depending on the source type and the citation style, you will be presented with the citation in one or more formats:

- 1st Footnote
- Subsequent footnotes
- Bibliography

Not all citation sources or styles have all of these formats defined as some may not be applicable, or defined by the style.

Citation built in **Evidence Explained** style...

1st Footnote:

St Peter & St Paul (Ticehurst, Sussex, England), "Baptisms, 1798-1805," p. 2, Fred Smith, 10 February 1800; digital images, *Ancestry* (https://www.ancestry.com/ : accessed 9 May 2024). 

Subsequent Footnote:

St Peter & St Paul (Ticehurst, Sussex), "Baptisms, 1798-1805," p. 2, Smith, 10 February 1800. 

Bibliography:

St Peter & St Paul (Ticehurst, Sussex, England). Baptisms, 1798-1805. Digital images. *Ancestry* https://www.ancestry.com/ : 2024). 

You can select and copy the citation text to your clipboard (for pasting into your document or database) by clicking the small grey copy button next to each format.



Some fields are optional for one or more of the available style or formats. If you do not complete these optional fields, the citation will be created without those optional parts.

However, if you do not complete a non-optional field, you will see a warning when the citation is created, and the missing value will be highlighted in the resulting citation:

Citation built in **Evidence Explained** style...

⚠️ There are one or more missing values for this citation style. Please enter these values and try again.

1st Footnote:
St Peter & St Paul (Ticehurst, Sussex, England), "Baptisms, 1798-1805," p. 2, Fred Smith, 10 February 1800; digital images, *Ancestry* ([**MISSING [URL]**]; accessed 9 May 2024).

Subsequent Footnote:
St Peter & St Paul (Ticehurst, Sussex), "Baptisms, 1798-1805," p. 2, Smith, 10 February 1800.

Bibliography:
St Peter & St Paul (Ticehurst, Sussex, England). Baptisms, 1798-1805. Digital images. *Ancestry* [**MISSING [URL]**]; 2024).

If this happens, simply complete the missing field(s) and click the *Build Citation* button again.

When a Template has multiple citation styles defined for it (for example "Evidence Explained", "Strathclyde" and "UTAS"), you can click the tabs to switch between the styles and any information you have already input will be preserved. Also, if you have already created the citation in one style, and then switch to a different style, the citation will automatically be regenerated in the chosen style.

When the citation details form is displayed, some fields will have example values shown in them. For example:

Register Type	<i>e.g. Baptisms & Burials</i>	♥
Date Range of Register	<i>e.g. 1754-1813</i>	
Page or image	<i>e.g. p. 22 or image 47</i>	
Website Title	<i>Ancestry.com</i>	♥
Collection Name	<i>e.g. Victoria, Australia, Baptisms 1848-1975</i>	♥
URL	<i>https://www.ancestry.com</i>	♥

These are simply guidelines to show you what sort of information is required in that field, and sometimes what format is expected. You will overwrite these values with your own.

Note: This is different to the Favourites feature available in the Premium version, which allows you to sort and recall values you frequently use. See [Favourites \(Premium feature\)](#) for details.

Some fields have additional help. Click on the help icon next to the field and the help will either be displayed in a pop-up, or a new browser tab or window will be opened directing you to another page (such as a Cite-Builder Blog article).

Registration Quarter 

Additionally, some Templates have additional guidelines displayed above the fields:

Cite-Builder.com
The Citation Generator for Genealogists

Home Basic (free) **Premium** User Guide FAQ Blog Videos Contact Account Log Out

Premium Top Level > Websites and Social Media > Website with Author Listed

Choose citation style, enter information, then click Build Citation

ⓘ Use this to cite content from a website or webpage itself which contains its own data. Don't use it for one of the big subscription sites (like Ancestry), cite each source type they contain as an online version of that source type. For a book or other document on a website, site it as an online book etc.

Chicago Evidence Explained Harvard Strathclyde

Author Name ♥

In addition to using the Favourites feature, Premium users are also able to store partially completed Templates as their own Personal Templates for later re-use. See [Personal Templates \(Premium feature\)](#) for more details on this feature.

If you are a Premium user, you have a couple of convenient shortcut buttons available for any "Access Date" or "Accessed Date" fields that Templates may contain. As it is common that the access date is the current date, or possibly the day before, you have two buttons

adjacent to an access date field to quickly enter today's date or yesterday's date.

Accessed Date

DD

Month

YYYY

Today

Yesterday

Note: Dates are not valida

Template Search (Premium feature)

Overview of Template Search feature

Recap: Cite-Builder citation sources are organised in a hierarchy of Templates and Template Groups. Template Groups are groups of Templates and/or other Template Groups. From the top-level of the hierarchy, you can navigate down to the specific Template you want to use by clicking on the Template Group buttons to open and display the contents of that Template Group, until you see the Template you want to use.

However, if you are a Premium user, you can also easily search the entire hierarchy for the Template(s) you want to use.

The Cite-Builder Search looks for the criteria you specify in the Template and the path (i.e., the Template Group names above the Template in the hierarchy), and additional keywords that the Cite-Builder admins have defined for certain Templates. This is the default behaviour, and you can modify it to perform a narrower search if needed. See [Search fields and options](#).

Note: The Template Search feature only searches the standard templates. It does not search your Personal Templates.

Once you find the Template you need, you simply click on it to use it as you would if you had browsed down the hierarchy to find it.

To access the Search page, click the *Template Search* button at the bottom of most Premium pages, or in the left-hand sidebar of most Premium pages:



Search fields and options

The freshly-loaded Search page is shown below:

Cite-Builder.com
The Citation Generator for Genealogists

Home Basic (free) **Premium** User Guide FAQ Blog Videos Contact Account Log Out

Premium

Enter search criteria and click Search button

Contains:

AND OR AND NOT

Contains:

Match whole words only

Look in Template Names Paths Keywords

Display results by path

Search Reset Search Help About Search Go Back To Top Level

You can enter one or two search strings into the Contains: fields. These can each be a word, a phrase or even part of a word. By default, the Cite-Builder Search is going to look for matches containing these search strings in the Template Name, the Template Group Names in the path to the Template, or the Keywords. Note: There are no wildcard characters used in this search, although partial words can be specified as search strings.

You can specify how the two criteria are combined:

- AND – The search looks for Templates matching both criteria. Note: It may be that one string is found in the Template Name and the other string is found in the Path or the keywords.
- OR – The search looks for Templates matching one or both of the criteria.
- AND NOT – The search looks for matches that contain the first string, but not the second.

If you find you are getting back too many results, you can modify the way that the Search works:

- Tick the checkbox to indicate to only look for whole words.
- Untick any of Template Names, Paths or Keywords to remove these from the search scope.

When you have entered your search criteria and set the search scope options, click the *Search* button and the results will be displayed below, as shown in this example:

The screenshot shows the Cite-Builder.com search interface. At the top, the logo reads "Cite-Builder.com The Citation Generator for Genealogists". Navigation links include Home, Basic (free), Premium, User Guide, FAQ, Blog, Videos, Contact, Account, and Log Out. The search section is titled "Enter search criteria and click Search button". It features two search input fields: "Contains: birth" and "Contains: bapt". Below these are radio buttons for "AND", "OR" (selected), and "AND NOT". There are also checkboxes for "Match whole words only" (unchecked), "Look in" (Template Names, Paths, and Keywords are checked), and "Display results by path" (unchecked). A row of buttons includes "Search", "Reset Search", "Help About Search", and "Go Back To Top Level". The search results are displayed in a grid of 32 blue buttons, each with a white icon and text. The results include: ACT Birth Certificate, NSW Baptism from Registry, NSW Baptism transcript, NSW Birth Certificate, NSW Birth transcript, NT Birth Certificate, QLD Birth Certificate, SA Birth Certificate, TAS Birth Certificate, VIC Baptism from Registry (Old Church Records), VIC Birth Cert (PDF copy), VIC Birth Cert (certified), WA Birth Certificate, ACT Death Cert, NSW Burial Certified Transcribed, NSW Burial from BDM Registry, NSW Death Cert, NSW Death Cert Transcript, NT Death Cert, QLD Death Cert, SA Death Cert, TAS Death Cert, VIC Burial from Registry (Old Church Records), VIC Death Cert (PDF copy), VIC Death Cert (certified), WA Death Cert, NSW Divorce 1873-1972, ACT Marriage Certificate, NSW Church Marr from BDM Registry, NSW Marr Church Record Transcript, NSW Marriage Certificate, and NSW Marriage Certificate Transcript.

If you do not get back the results you need, simply change the criteria or scope and click *Search* again.

As a rule of thumb, start with the broadest search and then narrow it down if you find too many results. Let's look at an example:

We enter two search strings, "birth" and "scotland", and leave the "AND" combination radio button selected. We also leave the scope selections as default.

We click search and we get back six Templates:

This isn't many, and we can see two Templates relating to birth and Scotland so we'd probably just click the one we want to use. However, there are also Templates relating to Marriages and Death Certificates listed, and we might be curious as to why these appeared in our search, and how to narrow the search to leave them out?

If we hover our cursor over one of the Death Cert Templates, we can see that the Template Path contained the string Birth (as in Civil Births, Marriages & Deaths) and that is what matched our first criteria.

If we uncheck *Paths* and click the *Search* button again, now we only get the results we were expecting:

Cite-Builder.com
The Citation Generator for Genealogists

Home Basic (free) Premium User Guide FAQ Blog Videos Contact Account Log Out

Premium

Enter search criteria and click Search button

Contains: birth

Contains: scotland

AND
 OR
 AND NOT

Match whole words only

Look in Template Names Paths Keywords

Display results by path

[Search](#)
[Reset Search](#)
[Help About Search](#)
[Go Back To Top Level](#)

Search results...

[Birth Cert Scotland from NRS](#)
[Birth Cert from Scotlands People](#)

Sometimes you might get back a lot of search results, and it's not clear from the names alone where the Template is applicable to. While you could hover your cursor over each Template to see the path and keywords as shown above, another way is to check the *Display results by path* checkbox and do the search again. This time, the results are returned divided by Template Group path as shown below.

Cite-Builder.com
The Citation Generator for Genealogists

Home Basic (free) Premium User Guide FAQ Blog Videos Contact Account Log Out

Premium

Enter search criteria and click Search button

Contains: birth

Contains: bap

AND
 OR
 AND NOT

Match whole words only

Look in Template Names Paths Keywords

Display results by path

[Search](#)
[Reset Search](#)
[Help About Search](#)
[Go Back To Top Level](#)

Search results...

Top Level > Civil Births, Marriages, Deaths & Divorces > Copies of Certificates > Australia > Births & Baptisms

[ACT Birth Certificate](#)
[NSW Baptism from Registry](#)
[NSW Baptism transcript](#)
[NSW Birth Certificate](#)
[NSW Birth transcript](#)
[NT Birth Certificate](#)
[QLD Birth Certificate](#)
[SA Birth Certificate](#)

[TAS Birth Certificate](#)
[VIC Baptism from Registry \(Old Church Records\)](#)
[VIC Birth Cert \(PDF copy\)](#)
[VIC Birth Cert \(certified\)](#)
[WA Birth Certificate](#)

Top Level > Civil Births, Marriages, Deaths & Divorces > Copies of Certificates > Canada > Alberta

[Birth Certificate from Provincial Archives](#)
[Stillbirth Certificate from Provincial Archives](#)

Top Level > Civil Births, Marriages, Deaths & Divorces > Copies of Certificates > Canada > British Columbia > Births & Baptisms

[Baptism from Vital Statistics](#)
[Birth Cert from Vital Statistics](#)
[Birth Cert other Online Image](#)
[Birth Registration Image on](#)

You can also check the *Display results by path* checkbox before you click *Search* if you are expecting a large number of results.

When returning to the Search page, the criteria and options you previously used (in this session) are preserved, so you can modify and re-do your search if needed. However, if you want to set everything back to the starting defaults, simply click the *Reset Search* button.

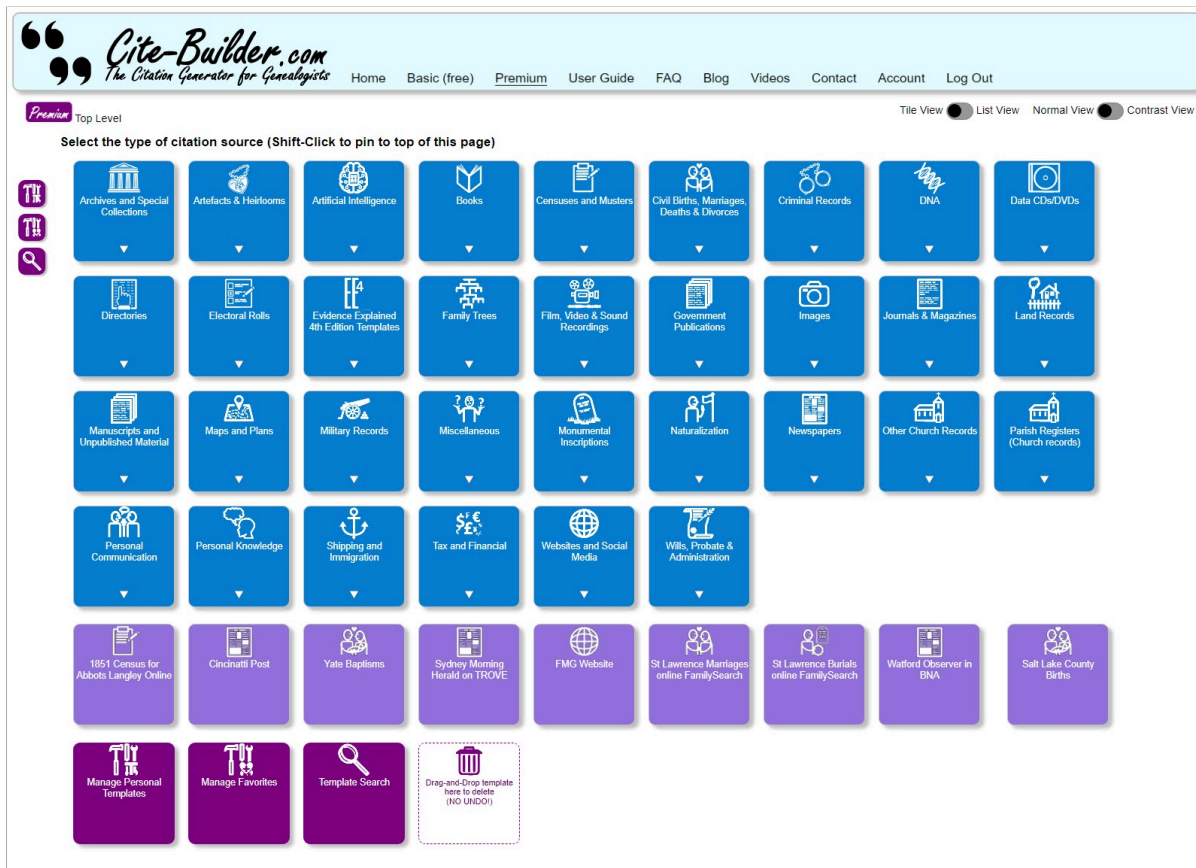


Personal Templates (Premium feature)

What are Personal Templates?

If you are a Premium user, you have the extra option to make copies of the predefined Templates with some of the information filled out, and save them as Personal Templates. For example, you might be citing the inscriptions from multiple headstones in a family plot at a particular municipal cemetery. You might create a copy of the appropriate Template, prefilled with the cemetery name, address and section, and save that as a Personal Template. Now you can use that Personal Template to create all the citations relating to those headstones, simply completing the different information per headstone each time.

When you have Personal Templates, these appear at the Top Level of the Cite-Builder Templates hierarchy, and are show as violet buttons below the predefined Template Groups:



By default, your Personal Templates are listed in the order you created them but you can reorder them using [Manage Personal Templates](#). See [Managing your Personal Templates](#) for more details.

If your Personal Templates are not visible, this may be because you have inadvertently gone to the Basic version of Cite-Builder. To remedy click on the Premium link in the menu bar to go to the Premium page (you may be prompted to login in to your Cite-Builder account).

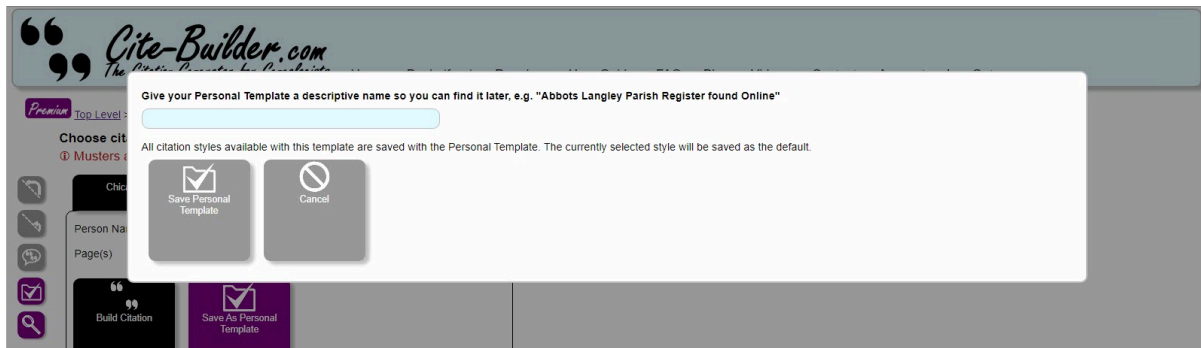
Creating a Personal Template

To create a new Personal Template, first open the Template from which you want to create the Personal Template. Then complete as many of the fields as you need to store in the Personal Template. Note you can change these values when you use the Personal Template, and complete any other fields you have left blank in the Personal Template. When done, simply click the *Save As Personal Template* button.



You will be prompted for a name with which to save the Personal Template. Use something that is meaningful to you so that you can easily select the Personal Template when you want to use it later. Note you can rename it later if you need too. See [Editing or renaming a Personal Template](#).

Also note that if the original Template had multiple styles defined, all styles are saved in the Personal Template, but the one you currently have selected is saved as the default for when you use the Personal Template. You can change this by editing the Personal Template.

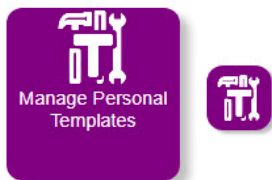


When you have saved the Personal Template, you are returned to the original Template where you can make additional changes to the fields and save as additional Personal Templates if needed.

When you return to the Cite-Builder Top Level you will see the new Personal Template(s) you have created displayed along with any other Personal Templates you already had.

Managing your Personal Templates


To manage Personal Templates, click the *Manage Personal Templates* button at the bottom of the screen, or in the left-hand sidebar.



This displays the Manage Personal Templates page, which shows a list of all your Personal Templates, with options you can perform on each one.

Important: Any changes you make from this are saved immediately. If you intend to do a lot of changes, we recommend that you first export your Personal Templates to a file as a backup in case you need to go back.


Re-ordering your Personal Templates

On the Manage Personal Templates page, your Personal Templates are listed top to bottom and this order will be displayed left to right on the Top-Level page, wrapping to additional rows if necessary. To change the order, click the Up and Down arrow icons  next to each Personal Template listed on the Manage Personal Templates page.

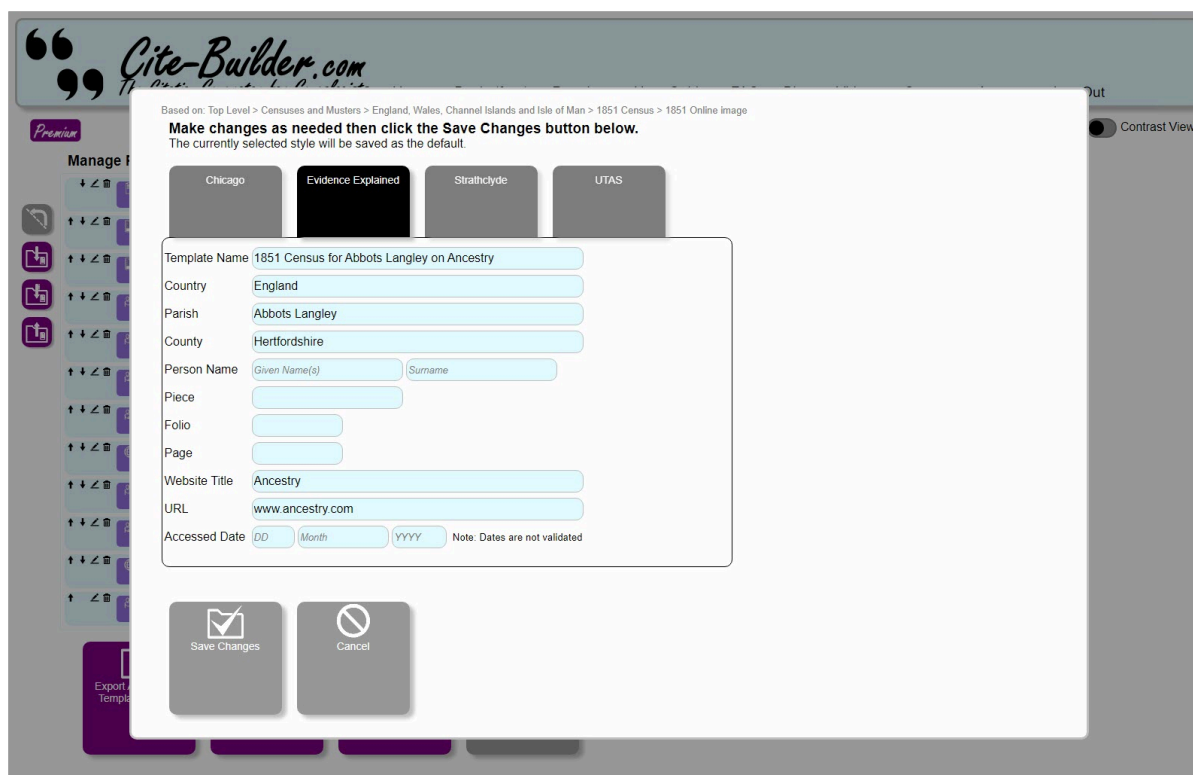
Time-saving tip: To move a Personal Template straight to the top of the list, hold the SHIFT key as you click the Up-arrow icon. To move a Personal Template straight to the end of the list, hold the SHIFT key as you click the Down arrow icon.

Note: You can also drag-and-drop your Personal Templates to change their order on the main Premium page. See [here](#).

Editing or renaming a Personal Template

To edit a Personal Template, including renaming it, click the Pen icon  next to the Personal Template.

This will open up the Personal Template form, where you can make changes to the values stored in the fields, and change the Personal Template name if you wish. You can switch between the stored styles, and when you save the changes the currently selected style is saved as the default.

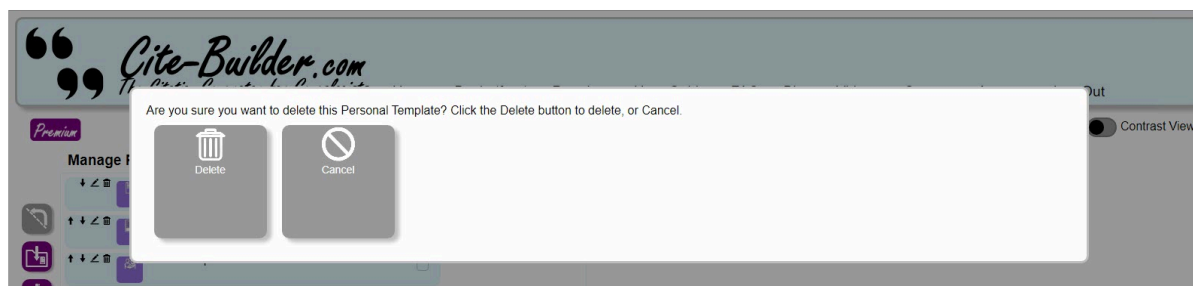


After making your changes, click the grey *Save Changes* button or, to abandon your changes, click the *Cancel* button.

Deleting a Personal Template

Over time you will likely build up a large number of Personal Templates and may want to have a clear out! To delete an unwanted Personal Template, click the Bin icon  next to it.

This will display a prompt, asking you confirm to delete the Personal Template.



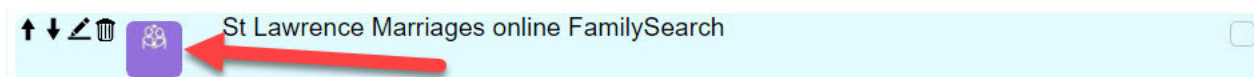
If you click the *Delete* button, the Personal Template is deleted. You cannot directly undo this, although you can restore the Personal Template by importing it from a backup copy of your Personal Templates that you have exported previously.

Time-saving tip: From the Manage Personal Templates page, you can delete a Personal Template with no additional prompting by hold the SHIFT key as you click the Bin icon. This is useful if you have a number of Personal Templates to delete, but be careful as there is no undo ! Ensure you have exported your Personal Templates as a backup before doing this.

Note: You can also drag-and-drop your Personal Templates to delete them on the main Premium page. See [here](#).

Viewing a Personal Template

If you simply want to view the contents of the Personal Template from the Manage Personal Templates page, click the small violet Personal Template button next to the Personal Template. For example:



This actually opens up the edit form so you can actually make changes here, including renaming the Personal Template, if you wish. This is equivalent to clicking the Pen icon.

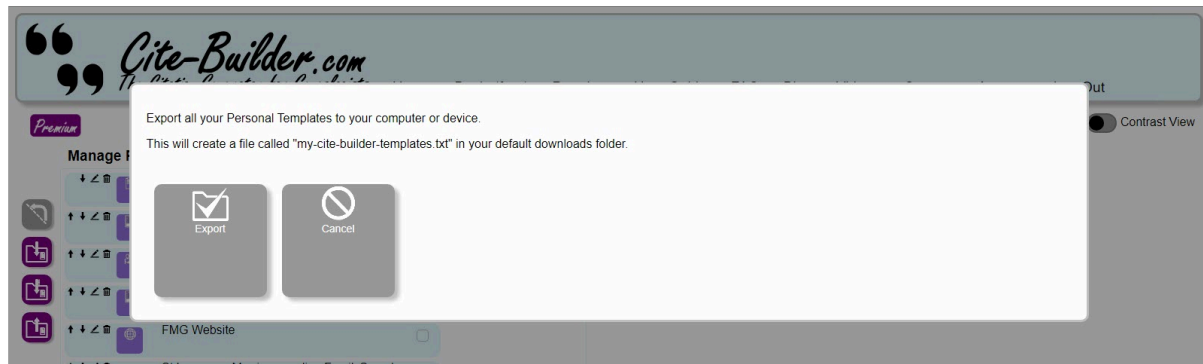
Exporting Personal Templates to a file

Your Personal Templates are stored in browser-specific storage on your device. Therefore, if you want to use them in a different browser and/or a different device, you need to export them from your original device and import them for use on the new browser or device. You may also want to share all or some of your Personal Templates with a fellow genealogist: in which case they would import the Personal Template file you created by exporting your Personal Templates. Finally, it's always a good idea to frequently export your Personal Templates to a file and back that file up to a USB device or to the cloud.

To export all of your Personal Templates to a file, from the Manage Personal Templates page click the *Export All Personal Templates To File* button in the lower toolbar or the small version in the left-hand sidebar.

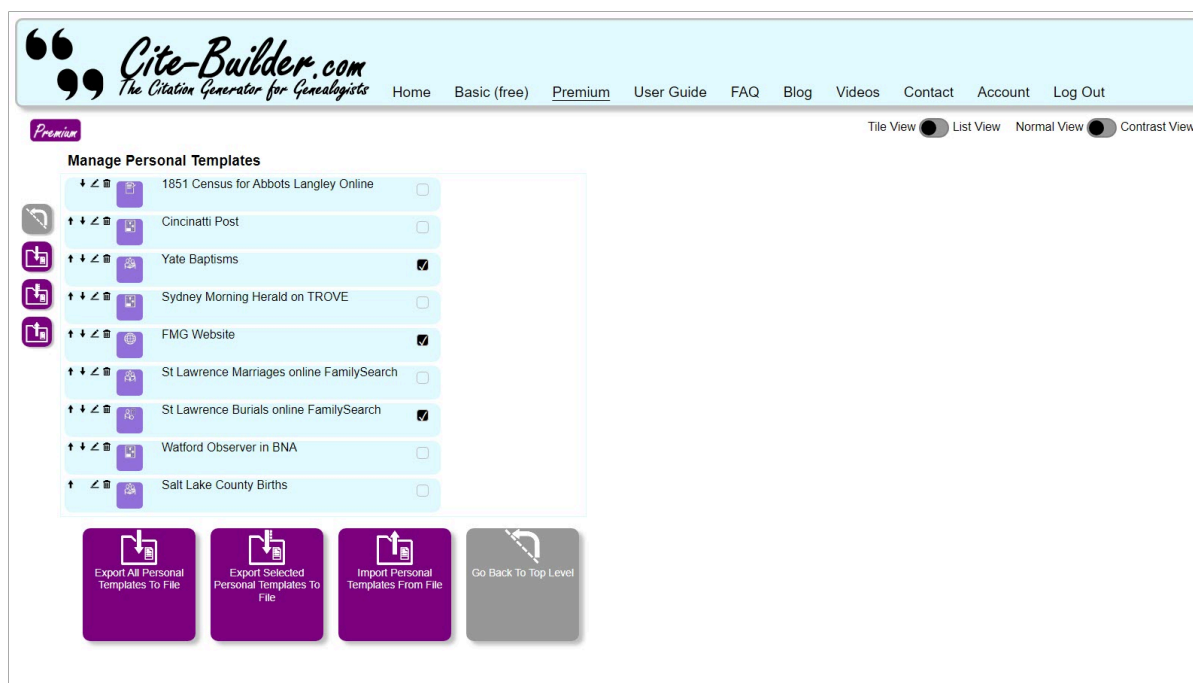


You will be asked to confirm the export, or to cancel.



To confirm, click the *Export* button. The Personal Templates are exported to a file called *my-cite-builder-templates.txt* in your default downloads folder. If you already have a file with that name in that folder, then a version number is appended to the filename.

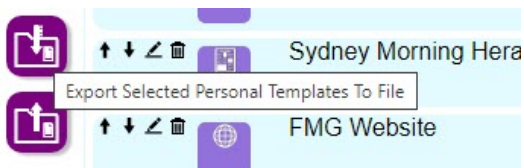
If you wish to export only selected Personal Templates to a file, then first select the Personal Templates to export by clicking the checkbox next to each Personal Template as shown in the example below:



Next, click the *Export Selected Personal Templates To File* button in the lower toolbar in the small version in the left-hand sidebar.



Tip: The small buttons in the left-hand sidebar can be a little hard to distinguish. Hover your cursor over them to view a "pop-up" description of what they are.



You'll be asked to confirm the export the selected Personal Templates, or to cancel.



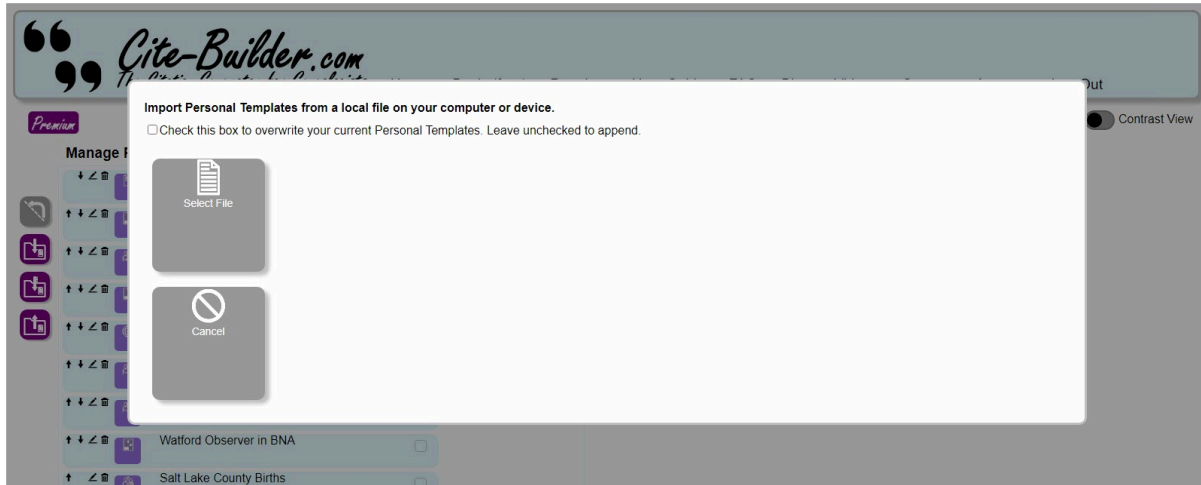
To confirm, click the *Export* button. The Personal Templates are exported to a file called *my-cite-builder-templates-selected.txt* in your default downloads folder. If you already have a file with that name in that folder, then a version number is appended to the filename.

Importing Personal Templates

To import Personal Templates, either from a backup you made by exporting, or from a Personal Template export file that someone shared with you, click the *Import Personal Templates From File* button on the Manage Personal Templates Page.

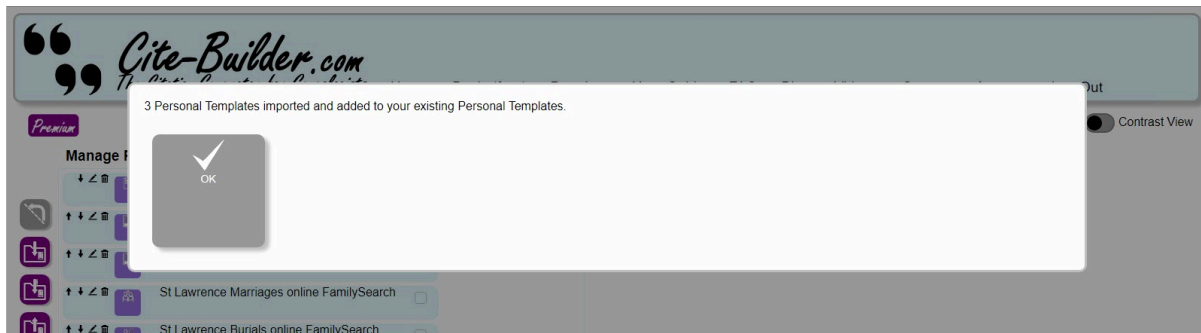


You will be prompted to select the file you want to import, or to cancel. Also, note there is a checkbox for you to tick if you want the import to completely overwrite your existing Personal Templates. If you leave this unchecked, the imported Personal Templates will be appended to your existing Personal Templates.



Click *Select File* and you will be prompted for the file that contains the Personal Templates you want to import.

Once you have selected a file, the Personal Templates it contains are imported.



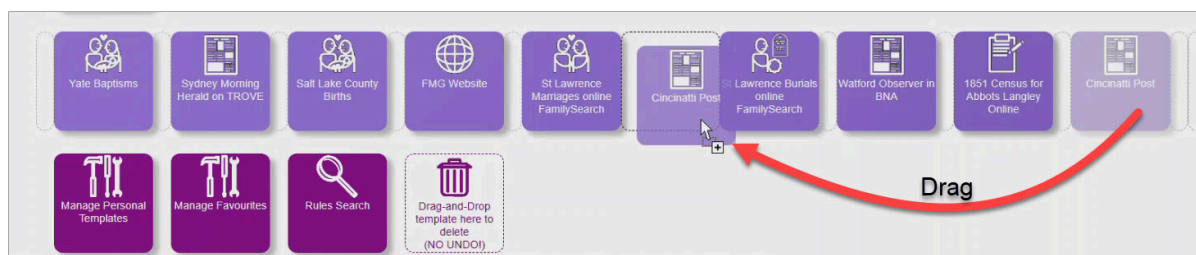
The imported Personal Templates will appear at the end of your Personal Template list but you can reorder these as you need to. See [Re-ordering your Personal Templates](#).

Note: There is no duplicate checking as part of the Personal Template import. If you find you have ended up with some duplicates you can simply delete the ones you don't need.

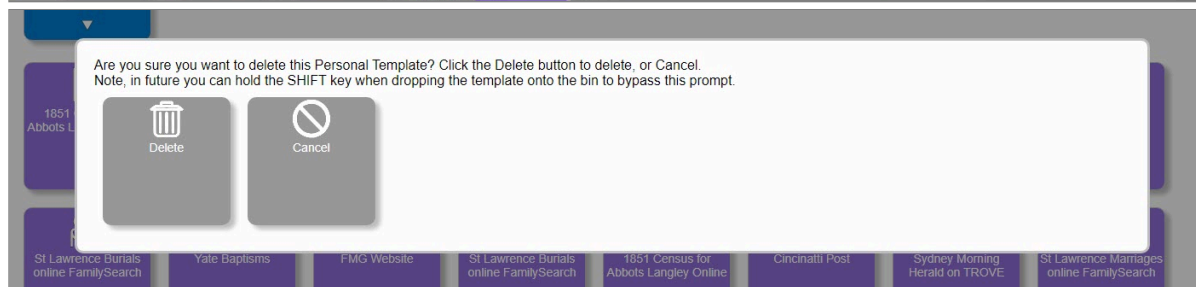
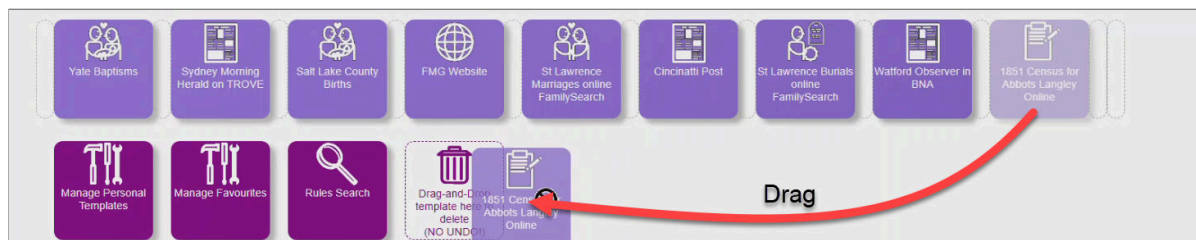
Important Note: The Personal Template export functions create very specific and complex format files. You'll note that they are text files, and so it may be tempting to edit them with a program like Notepad (on Windows) or TextEdit (IOS). We would caution against this as the Import function is very picky when it comes to the contents and format of these files; importing a file that you have edited is likely to have unpredictable results!

Drag-and-Drop Personal Template Sorting & Deletion

You can use your cursor to drag-and-drop your Personal Templates on the main Premium screen to re-order them. When dragging a Personal Template, it's best to "grab" the Personal Template in the lower-center of the tile. As you move your cursor across your other Personal Templates, you will see a faint dotted outline appear between them. These are the "dropzones" where you can move the Personal Template to. As you hover the cursor over one of these, it will open up wider for you to drop the Personal Template into. There is no additional prompting when moving Personal Templates as it's easy enough to move them back if you make a mistake.



You can also drag a Personal Template onto the new "Delete" "dropzone" to delete it. By default, you are prompted to confirm deletion, but if you hold the SHIFT key while dropping the Personal Template onto the Delete dropzone, you can bypass this prompt. There is no "un-do" option. So, if you are going to delete or move a large number of Personal Templates, we would recommend you do an Export first as a backup.




Favourites (Premium feature)

What are Favourites?

If you are a Premium user, you have the extra option to store *Favourites*. These are values you enter frequently into certain fields when creating citations, and you can store them to recall later from a dropdown list on the field. Additionally, where fields use the same name in multiple Templates (including your Personal Templates), the Favourites for that field name are available across all of them.

For example, you might frequently enter the name Chipping Sodbury, Gloucestershire into the Location field across a number of different citation sources. You can save this as a Favourite for the Location field. It'll save you time later, and save having to remember how to spell Gloucestershire correctly each time!

Favourites can be stored and recalled from standard citation Templates (defined by the Cite-Builder admins) and Personal Templates.

Not every field can have Favourites associated with it; for some fields it simply makes no sense. You can tell which fields can have Favourites stored because they have a purple heart icon  next to them, as shown in the following example.

Depending on which browser you are using, you may see a small dropdown arrow on the right-hand side of the field. It may be visible all the time, or only when you click on or hover the mouse over the field. If you click on this down-arrow, you should get the drop-down list of any Favourites you have stored for that field. On some browsers, there is no drop-down arrow and you need to double-click in the field to display the list of Favourites. The obvious clue that the field can have Favourites though is the presence of the purple heart Favourite icon.

Also, depending on whichever browser you are using, the field drop-down list may also include some values for that field that you have entered recently, as well as your stored Favourites. This is simply a function of the browser's AutoComplete feature.

It's also important to realise that the drop-down list of Favourites on a field is automatically filtered by whatever is already in that field. If the field is blank, then the full list of that field's Favourites will be listed. If there is anything already in the field, then the Favourites list will only contain values that contain what is in the field already. This is best illustrated with an example:

Here we see that the Church Name field is blank, and so we have all of the Favourites for that field displayed in the drop-down:

However, if we typed in "John" and then clicked the drop-down arrow, we only get a list of Favourites for that field that contain the word "John":

Church Name	John	
Place	e.g. Saxthorpe, Nor	
Burial Date	DD Month	St John's & St Mark's <small>Note: Dates are not validated</small>
Death Date	DD Month	St John's In The Fields <small>Note: Dates are not validated</small>
Person Name	Given Name(s)	St John's
Register Type	e.g. Baptisms & Burials	


This can be a very powerful way to quickly find the Favourite you want to use.

The Favourite icon also has the function of storing a new Favourite when you click on it – see [Storing a Favourite](#).

NOTE: From 22nd December 2023, your Favourites will be automatically migrated and stored on the Cite-Builder server the first time you login to the Premium page. However, we still recommend that you export a copy to file from time to time – especially after you have created a large number or have done a lot of reordering or deletions. This enables you to recover your Favourites to a previous state should you need to.

If your Favourites are not visible, this may be because you have inadvertently gone to the Basic version of Cite-Builder. To remedy click on the Premium link in the menu bar to go to the Premium page (you may be prompted to login in to your Cite-Builder account).

Storing a Favourite

To store a Favourite, from either a standard citation Template or a Personal Template, enter the value you want to store in the field, and click the Favourite icon  next to it. You will see a confirmation message that the Favourite has been stored and you then need to click OK to continue.



Time Saving Tip: Hold SHIFT when you click the Favourite icon and the Favourites is stored with no confirmation message.

Managing your Favourites

To manage Favourites, click the *Manage Favourites* button displayed in the lower toolbar, or in the left-hand sidebar.



This displays the Manage Favourites page, which shows a list of all your Favourites listed by field, with options you can perform on each one. For example:

Premium

Manage Favourites

	CEMETERY ADDRESS ↕ ⌵	<input type="checkbox"/>
	↓ ⌵ ↙ Abbots Langley, Herts	<input type="checkbox"/>
	↑ ⌵ ↘ Kings Langley, Herts	<input type="checkbox"/>
	↑ ⌵ ↘ Northleach, GLS	<input type="checkbox"/>
	CEMETERY NAME ↕ ⌵	<input type="checkbox"/>
	↓ ⌵ ↙ St Lawrence Church, Abbots Langley	<input type="checkbox"/>
	↑ ⌵ ↘ St Pauls Church, Kings Langley	<input type="checkbox"/>
	↑ ⌵ ↘ St Peter & St Paul Church, Northleach	<input type="checkbox"/>
	CHURCH NAME ↕ ⌵	<input type="checkbox"/>
	↓ ⌵ ↙ St Peter & St Paul	<input type="checkbox"/>
	↑ ⌵ ↘ St John's	<input type="checkbox"/>
	↑ ⌵ ↘ St Lawrence	<input type="checkbox"/>
	CIVIL DIVISION ↕ ⌵	<input type="checkbox"/>
	↓ ⌵ ↙ Justice Precinct 4	<input type="checkbox"/>
	COUNTRY ↕ ⌵	<input type="checkbox"/>
	↓ ⌵ ↙ England	<input type="checkbox"/>
	↑ ⌵ ↘ Australia	<input type="checkbox"/>
	↑ ⌵ ↘ Wales	<input type="checkbox"/>
	↑ ⌵ ↘ England	<input type="checkbox"/>
	PLACE ↕ ⌵	<input type="checkbox"/>
	↓ ⌵ ↙ Ticehurst, Sussex	<input type="checkbox"/>
	↑ ⌵ ↘ Yate, Gloucestershire	<input type="checkbox"/>
	↑ ⌵ ↘ Northleach, Gloucester	<input type="checkbox"/>
	↑ ⌵ ↘ Blockley, Gloucestershire	<input type="checkbox"/>
	URL ↕ ⌵	<input type="checkbox"/>
	↓ ⌵ ↙ https://familysearch.org	<input type="checkbox"/>
	↑ ⌵ ↘ https://findagrave.com	<input type="checkbox"/>
	↑ ⌵ ↘ https://thegenealogist.co.uk	<input type="checkbox"/>
	↑ ⌵ ↘ https://www.findmypast.com/	<input type="checkbox"/>
	↑ ⌵ ↘ https://www.ancestry.com/	<input type="checkbox"/>
	WEBSITE TITLE ↕ ⌵	<input type="checkbox"/>
	↓ ⌵ ↙ Commonwealth War Graves Commission	<input type="checkbox"/>
	↑ ⌵ ↘ Find a Grave	<input type="checkbox"/>
	↑ ⌵ ↘ TheGenealogist	<input type="checkbox"/>
	↑ ⌵ ↘ Ancestry	<input type="checkbox"/>
	↑ ⌵ ↘ Findmypast	<input type="checkbox"/>

Export All Favourites To File	Export Selected Favourites To File	Import Favourites From File	Go Back To Top Level

V5.0


Important: Any changes you make from this page are saved immediately. If you intend to do a lot of changes, we recommend that you first export your Favourites to a file as a backup in case you need to go back.

Re-ordering your Favourites


On the Manage Favourites page, your Favourites are grouped by the field name that they are associated with, and then within each group their order may vary. By default, the most recently stored Favourite appears at the top of each group, so that it is at the top of the drop-down list when you are recalling Favourites.

To change the order within each group, click the Up and Down arrow icons ↑ ↓ next to each Favourite listed.

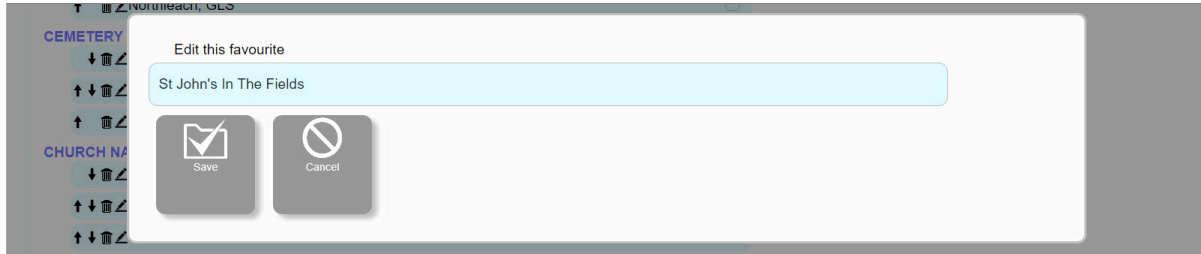
Time-saving tip: To move a Favourite straight to the top of the group, hold the SHIFT key as you click the Up-arrow icon. To move a Favourite straight to the end of the group, hold the SHIFT key as you click the Down arrow icon.

Bonus Time-saving Tip: You may find that having all the Favourites for a particular field stored, and displayed, in alphabetical order. Click the AZ sort icon  next to the field name to sort all the Favourites for that field from A to Z.

Editing or renaming a Favourite


To edit a Favourite, (which is the same as renaming it), click the Pen icon  next to the Favourite.

This will open up a form, where you can make changes to the value stored as a Favourite.

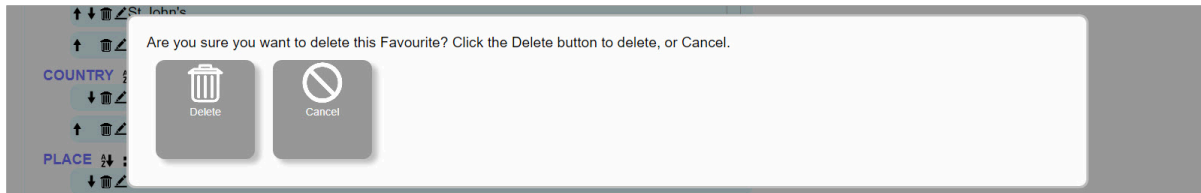


After making your changes, click the grey *Save* button or, to abandon your changes, click the *Cancel* button.

Deleting a Favourite

Over time you will likely build up a large number of Favourites and may want to have a clear-out! To delete an unwanted Favourite, click the Bin icon  next to it.


This will display a prompt, asking you confirm to delete the Favourite.



If you click the *Delete* button, the Favourite is deleted. You cannot directly undo this, although you can restore the Favourite by importing it from a backup copy of your Favourites that you have exported previously.

Time-saving tip: From the Manage Favourites page, you can delete a Favourite with no additional prompting by holding the SHIFT key as you click the Bin icon. This is useful if you have a number of Favourites to delete, but be careful as there is no undo ! Ensure you have exported your Favourites as a backup before doing this.

Removing Duplicate Favourites

You may find you have stored some duplicate Favourites. You can either manually delete the duplicates, using the Delete button as described earlier. Or, you can click the Remove Duplicates  button next to each field name.

Exporting Favourites to a file

To export all of your Favourites to a file, from the Manage Favourites page click the *Export All Favourites To File* button.

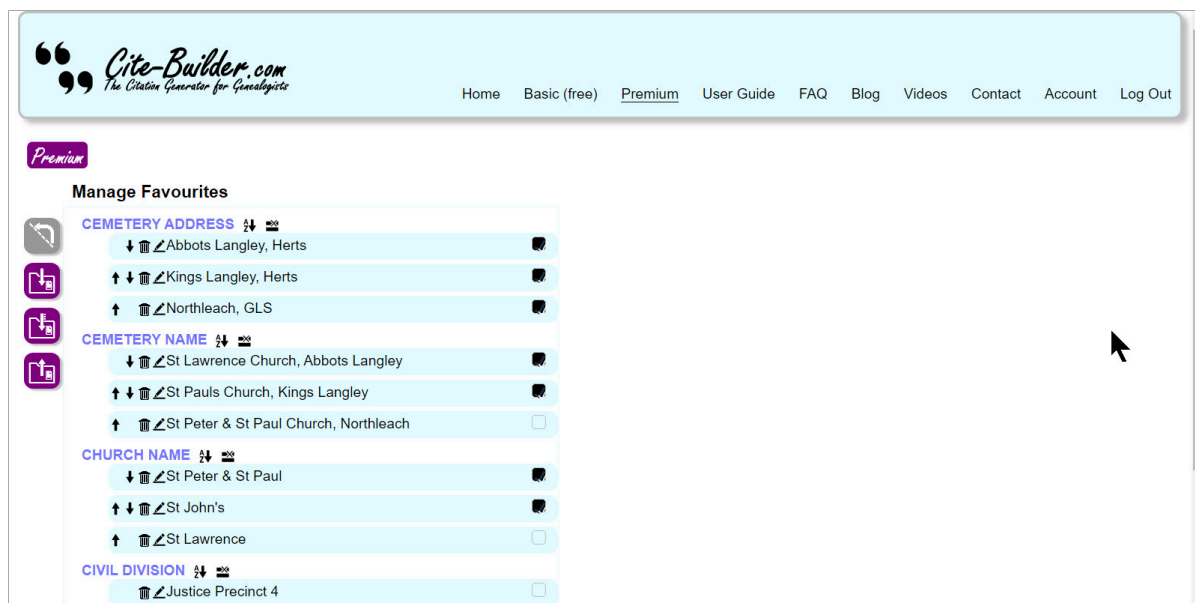


You'll be asked to confirm the export, or to cancel.



To confirm, click the *Export* button. The Favourites are exported to a file called "my-cite-builder-favourites.txt" in your default downloads folder. If you already have a file with that name in that folder, then a version number is appended to the filename.

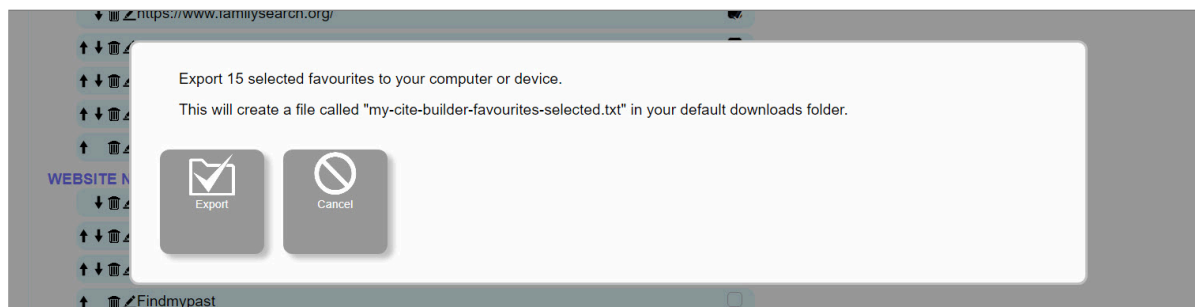
If you wish to export only selected Favourites to a file, then first select the Favourites to export by clicking the checkbox next to each Favourite as shown in the example below:



Next, click the *Export Selected Favourites To File* button.



You'll be asked to confirm the export the selected Favourites, or to cancel.



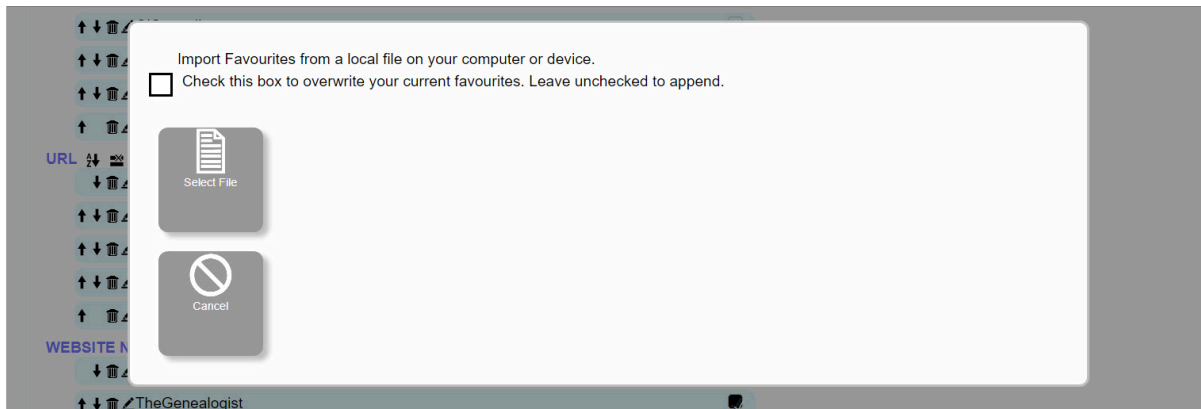
To confirm, click the *Export* button. The Favourites are exported to a file called "my-cite-builder-favourites-selected.txt" in your default downloads folder. If you already have a file with that name in that folder, then a version number is appended to the filename.

Importing Favourites

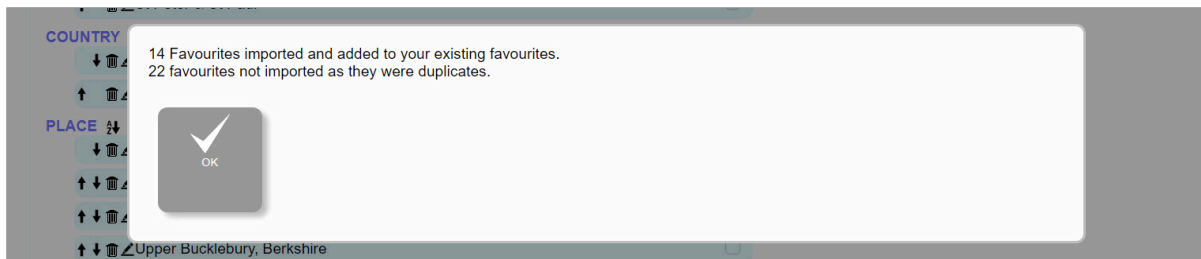
To import Favourites, either from a backup you made by exporting, or from a Favourite export file that someone shared with you, click the *Import Favourites From File* button on the Manage Favourites Page.



You will be prompted to select the file you want to import, or to cancel. Also, note there is a checkbox for you to tick if you want the import to completely overwrite your existing Favourites. If you leave this unchecked, the imported Favourites will be appended to your existing Favourites.



Once you have selected a file, the Favourites it contains are imported, excluding any duplicates.



The imported Favourites will appear at the end of your Favourite groups but you can reorder these as you need to. See [Re-ordering your Favourites](#).

Important Note: The Favourite export functions create very specific and complex format files. You'll note that they are text files, and so it may be tempting to edit them with a program like Notepad (on Windows) or TextEdit (IOS). We would caution against this as the Import function is very picky when it comes to the contents and format of these files; importing a file that you have edited is likely to have unpredictable results!

Pins (Premium feature)

You can "pin" Template Groups and/or Templates to the top of the page that they appear, making it easier to find them quickly. Just SHIFT-click on a Template Group/Template to pin it. To "unpin", just SHIFT-Click again.

Premium Top Level

Tile View List View Normal View Contrast View

Select the type of citation source (Shift-Click to pin to top of this page)



Archives and Special Collections	Artefacts & Heirlooms	Artificial Intelligence	Books	Civil Births, Marriages, Deaths & Divorces	Criminal Records	DNA	Data CDs/DVDs	Directories
Electoral Rolls	Evidence Explained 4th Edition Templates	Family Trees	Film, Video & Sound Recordings	Government Publications	Images	Journals & Magazines	Land Records	Manuscripts and Unpublished Material
Maps and Plans	Military Records	Miscellaneous	Monumental Inscriptions	Naturalization	Newspapers	Other Church Records	Parish Registers (Church records)	Personal Communication
Personal Knowledge	Shipping and Immigration	Tax and Financial	Websites and Social Media	Wills, Probate & Administration				