Creating a Subset from a TMG Project

Using the List of People Report and Flags

Presented by
Bob Mallett

Ottawa TMG Users Group

ottawa-tmg-ug.ca

Introduction

As an active researcher of a given surname, or surnames, as the case may be, there may be occasions where other researchers share their research with you in some electronic form, such as gedcom, because some portion of their research is pertinent to yours.

How much of this new data do you wish to keep? The following procedure, utilizing the List of People (LOP) report and flags, will allow you to identify those individuals who are of most interest to your research, and to create a new TMG project containing only those people.

The screenshots shown here were taken from TMG ver. 8.08. The procedure assumes that the received data has already been imported into a TMG project.

Our Progenitor of Interest is William Mallett, ID#1

We will seek to identify all those descended from William, their spouses, and any other people deemed significant, for whatever reason, that we may wish to keep.

We will also seek to identify any persons that don't seem to be tied in to William's line at all.
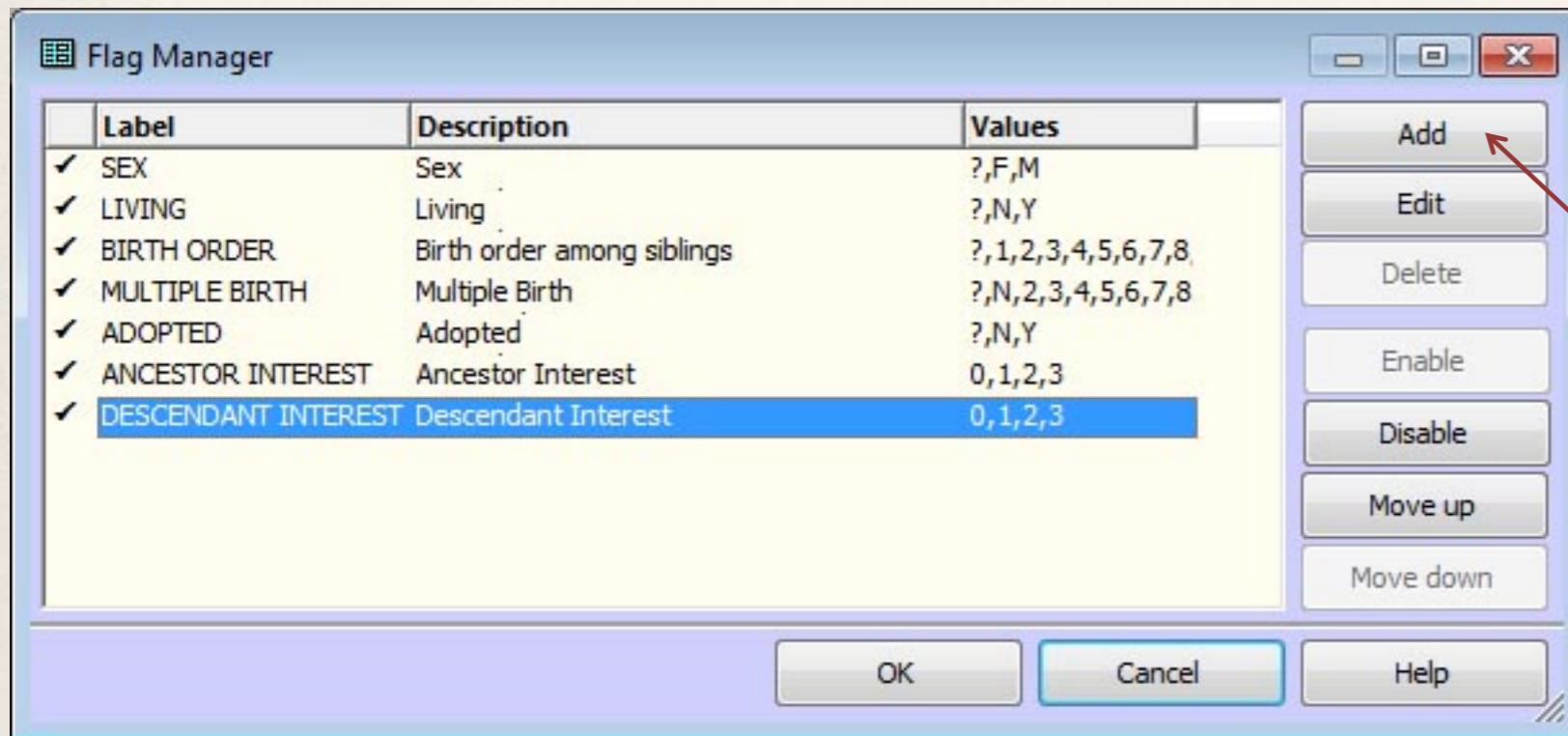
Create 2 New Flags

Select "File" from the main menu,

then

"Flag Manager"

Create 2 New Flags

This is the Flag Manager Dialog Box, displaying the Standard Flags that come with TMG.

Click Add

Create 2 New Flags

Add New Flag

Label : |

Values : ?,N,Y

Data set : 1 TAVISTOCK FROM NICK 131104 / M3r15 mall ▼

Description

? = Unknown
N = No
Y = Yes

OK   Cancel   Help

This is the Add New Flag Dialog Box, displaying the standard suggested flag values for a new flag.

Give the new flag a name. We'll call it "Main Line"

This is a binary exercise, so delete the "?," from values.

Remove the "? = Unknown" from Description.

Create 2 New Flags

Add New Flag

Label : Main Line

Values : N,Y

Data set : 1 TAVISTOCK FROM NICK 131104 / M3r15 mall
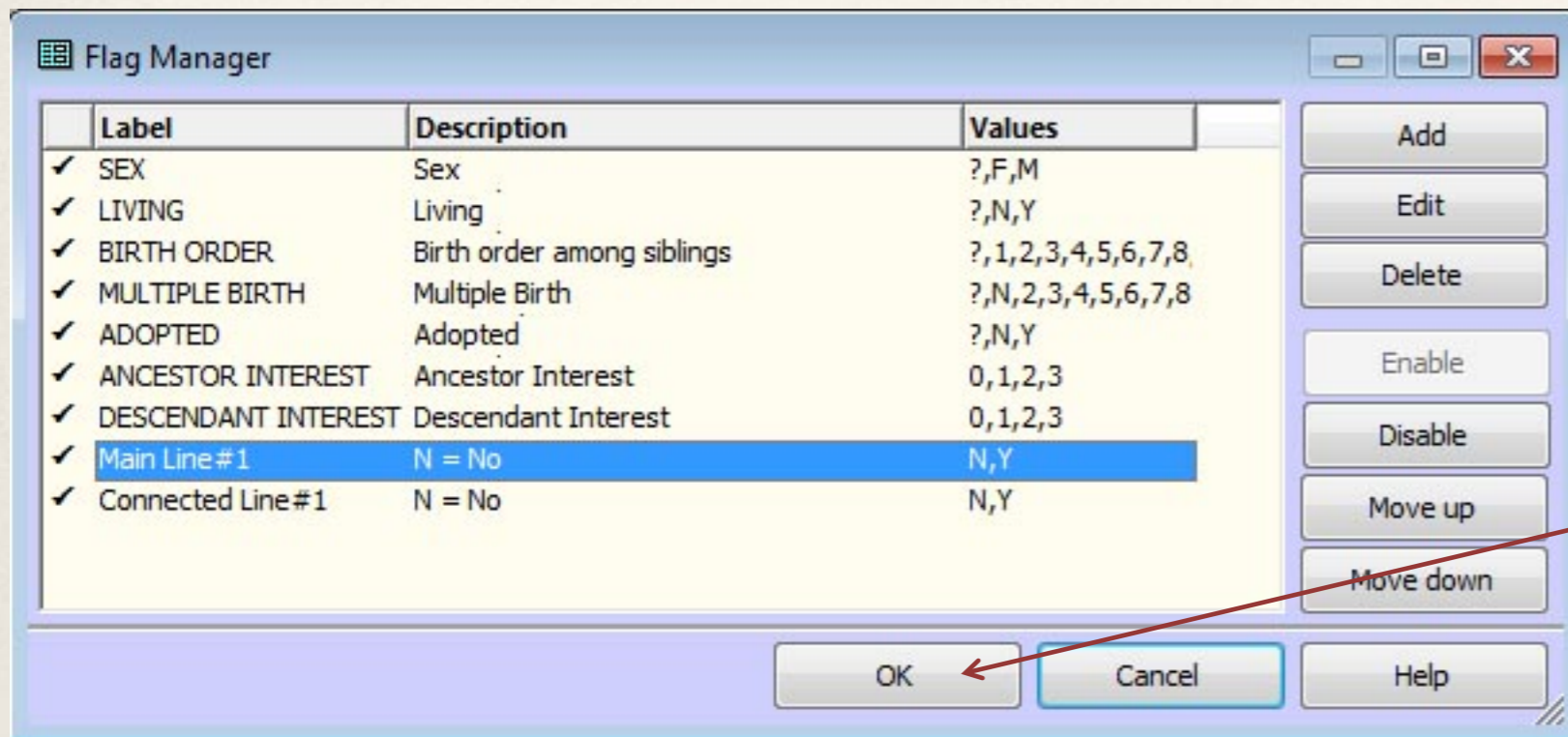
Description

N = No
Y = Yes

| OK | Cancel | Help |

This is the Add New Flag Dialog Box, showing the settings that we entered for the new flag.
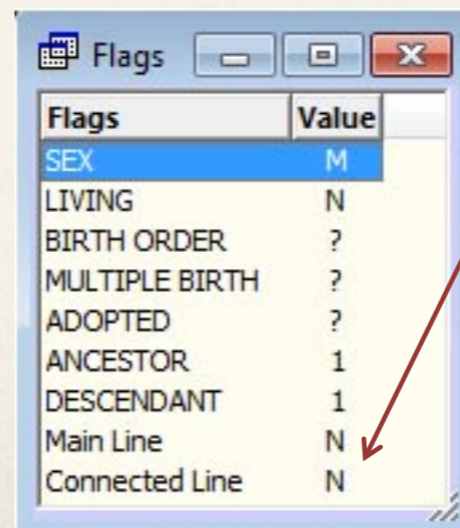
Click OK

Repeat the above procedure to add the second flag. Call it "Connected Line".
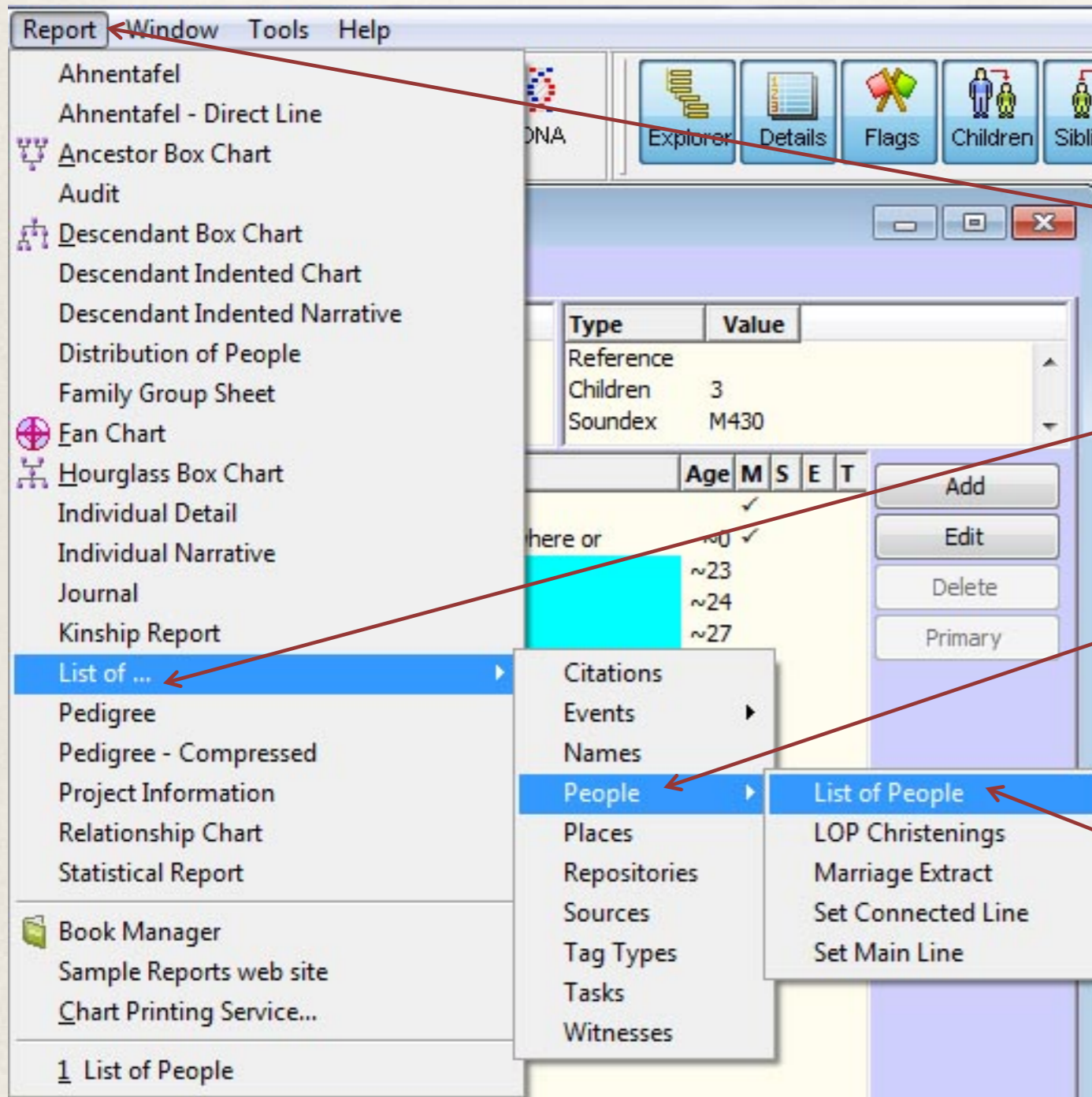
Create 2 New Flags

This is the Flag Manager Dialog showing the 2 new flags that we just created.

Click OK

Each person in the project will have the value "N" applied to each of the 2 new flags.

Identify the Main Line,
and set the Main Line Flag

Select the List of People Report.

Select "Report" from the Main Menu

Select "List of..." from the drop down menu

Select "People" from the 2nd drop down menu.

Select "List of People" from the 3rd drop down menu.

Identify the Main Line,
and set the Main Line Flag

This is the Report Definition Screen for List of People.

Click the "Filtered Group" radio button.

Click the "Screen Preview" radio button.

Click Add.

Identify the Main Line,
and set the Main Line Flag

This is the Report Filter Screen for List of People.

Click the down arrow beside the "Field" drop down list box.

Identify the Main Line,
and set the Main Line Flag

Give the report filter that we're going to create a name; call it "is a descendant of"

Choose "Is a Descendant" from the drop down list box under "Field".

Identify the Main Line,
and set the Main Line Flag

"of ID #" fills in automatically.

Enter "1" in the "Value" field (William Mallett's ID #).

Select "OR" under "Connect".

Identify the Main Line,
and set the Main Line Flag

Select ID number as the second filter criterion

Select "= Equals" under "Operator" for the second filter criterion.

Select "1" under "Value" for the second filter criterion.

Select "End" under "Connect" for the second filter criterion.

Identify the Main Line,
and set the Main Line Flag

Click "Spouses" and "Ancestors".

Enter "2" in the "generations" box.

Identify the Main Line,
and set the Main Line Flag

Click "OK".

Identify the Main Line,
and set the Main Line Flag

The filter criteria for the main line have been set. Now enable the "Main Line" flag.

Click Options.

Identify the Main Line,
and set the Main Line Flag
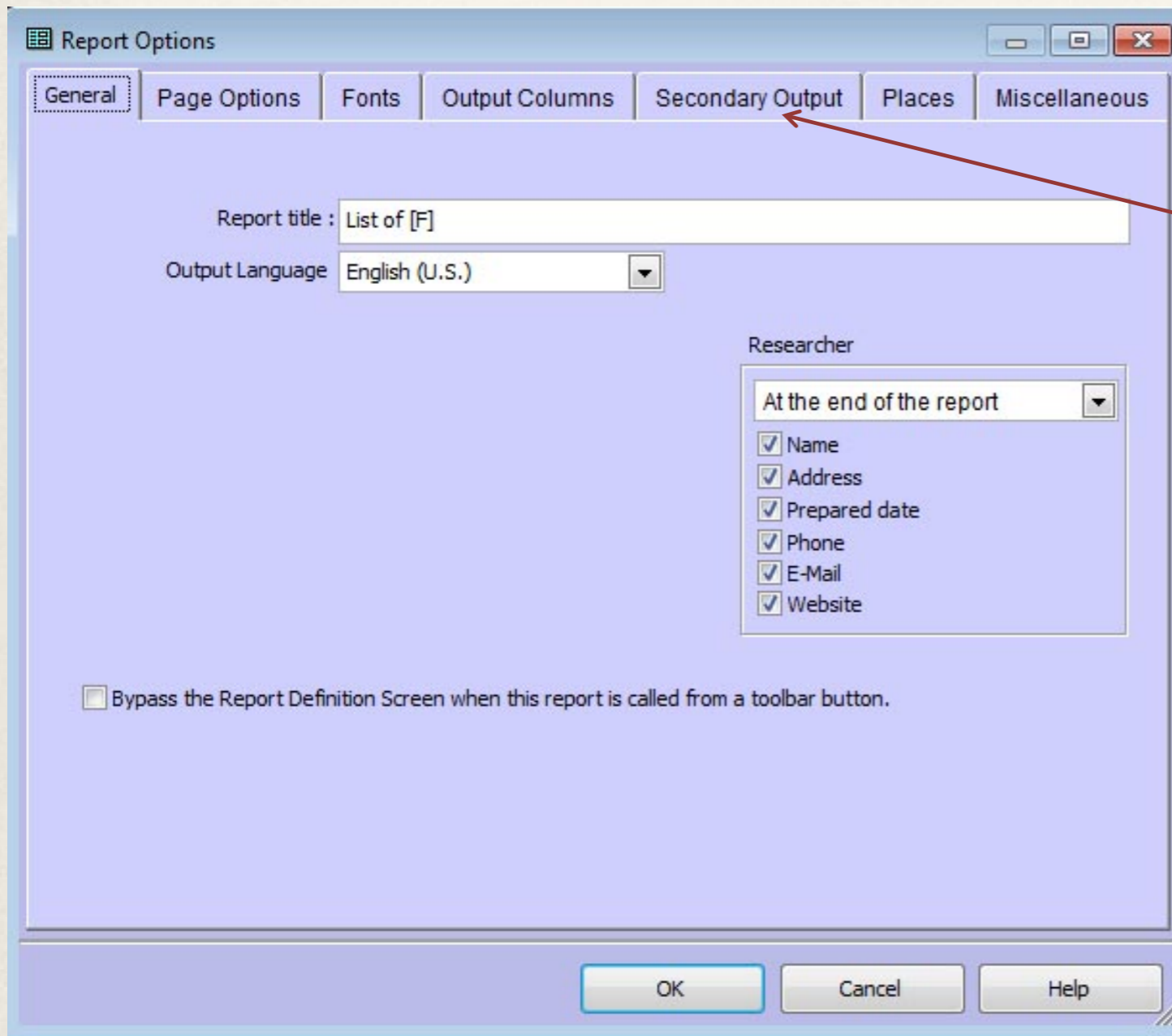
This is the "Report Options" screen.

Click the "Secondary Output" tab.

Identify the Main Line,
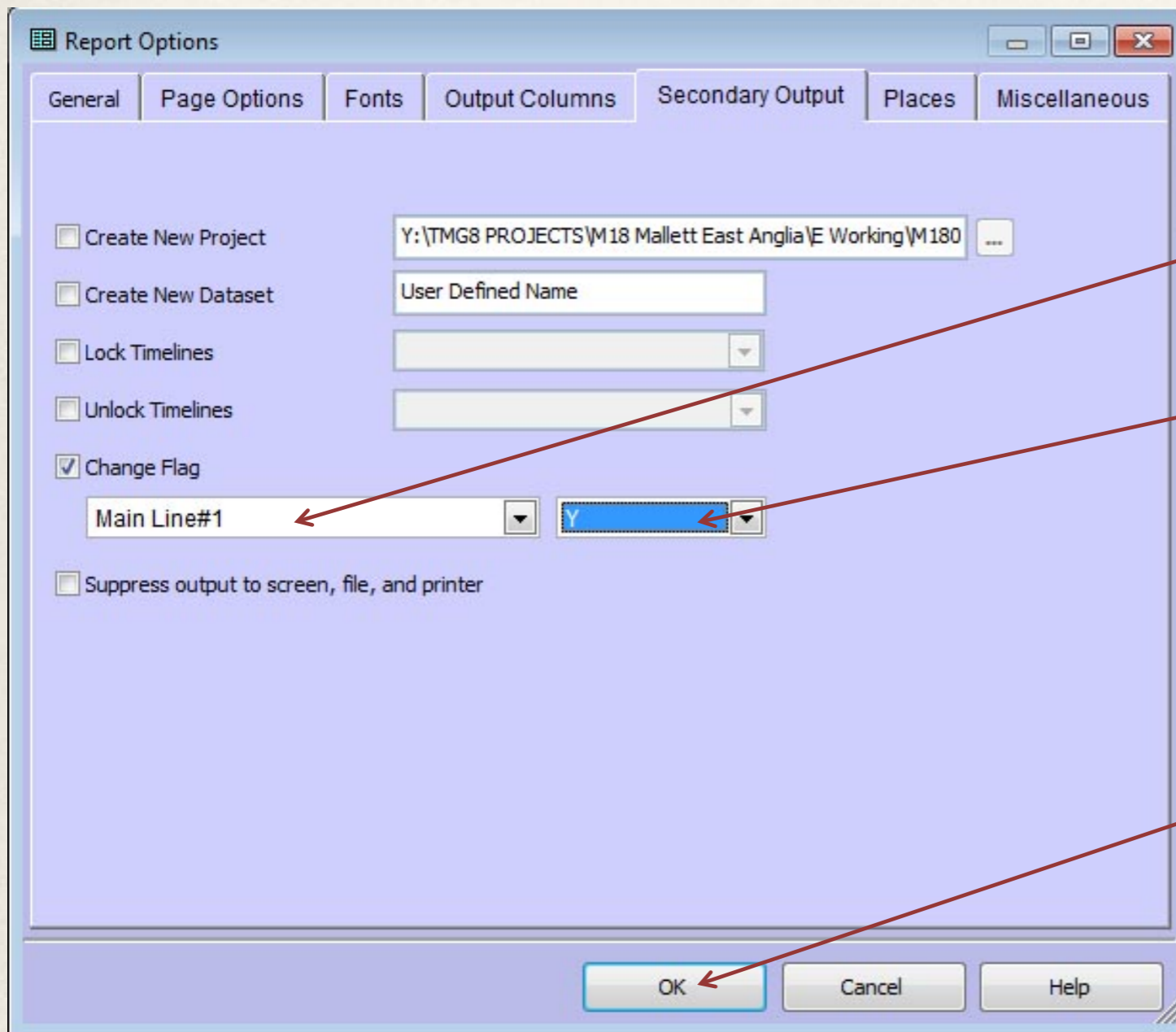# and set the Main Line Flag

This is the "Secondary Output" screen.

Click the "Change Flag" tick box.

Identify the Main Line,
and set the Main Line Flag

This is the "Secondary Output" screen.

Select the "Main Line#1" flag from the drop down list box.

Select "Y" from the second drop down list box (flag value).

Click "OK"

Option: Save the Filter Criteria and the Report Output Options as a "Report Configuration"

A report configuration will save all of the filter and report option settings that we have just made so that we can easily recall them and use them again.

Click "Add".

Option: Save the Filter Criteria and the Report Output Options as a "Report Configuration"
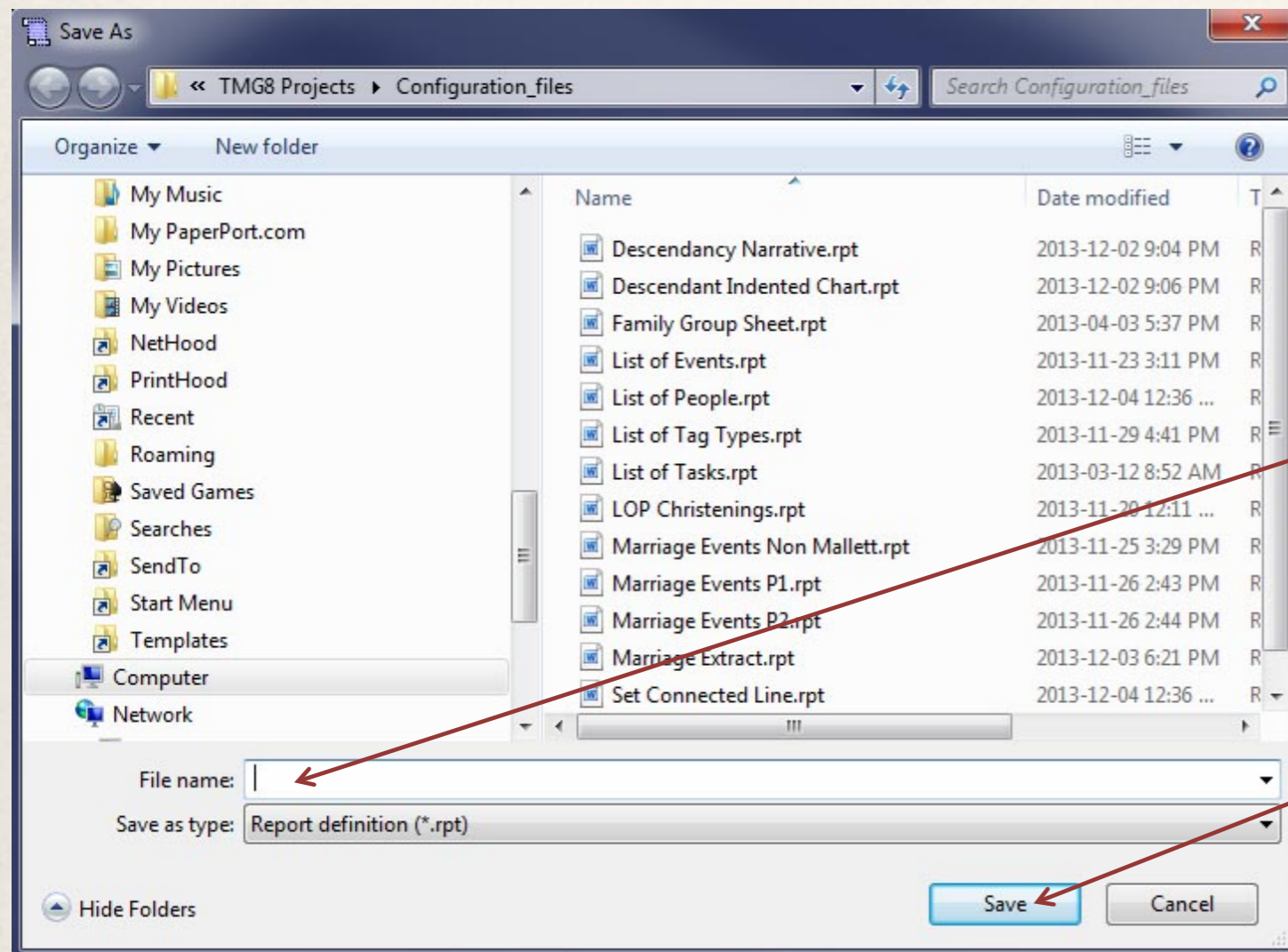
A file dialog box will open.

Type a name for the report configuration. We'll call this one "Set Main Line".

Click "Save".

Option: Save the Filter Criteria and the Report Output Options as a "Report Configuration"

The "Set Main Line" Configuration can be recalled and used any time.

Identify the Main Line,
and set the Main Line Flag

The filter criteria for the main line have been set, and the "Main Line" flag has been enabled.

When we run the report, all those people who meet the filter criteria will have their "Main Line" flag set to "Y"

Click "Create Report".

Identify the Main Line,
and set the Main Line Flag

| Filter progress		
Clause 1 :	Is a Descendant of ID # 1 :	239
Clause 2 :	ID number = Equals 1 :	1
Clause 3 :	(unused)	
Clause 4 :	(unused)	
Clause 5 :	(unused)	
Clause 6 :	(unused)	
Clause 7 :	(unused)	
Clause 8 :	(unused)	
	Combined filter	240
	Plus spouses	153
	Plus ancestors	153
	Plus descendants	-------
	Total people	546

☐ Do not close this window automatically

[Close]

This window will close automatically in 4 seconds

There are 239 direct descendants of William Mallett (1) (+ William = 240), 153 spouses of those 240, plus 153 ancestors of the 240.

Click "Close", (or wait till the dialog closes automatically after 4 seconds).

Identify the Main Line,
and set the Main Line Flag

Progress

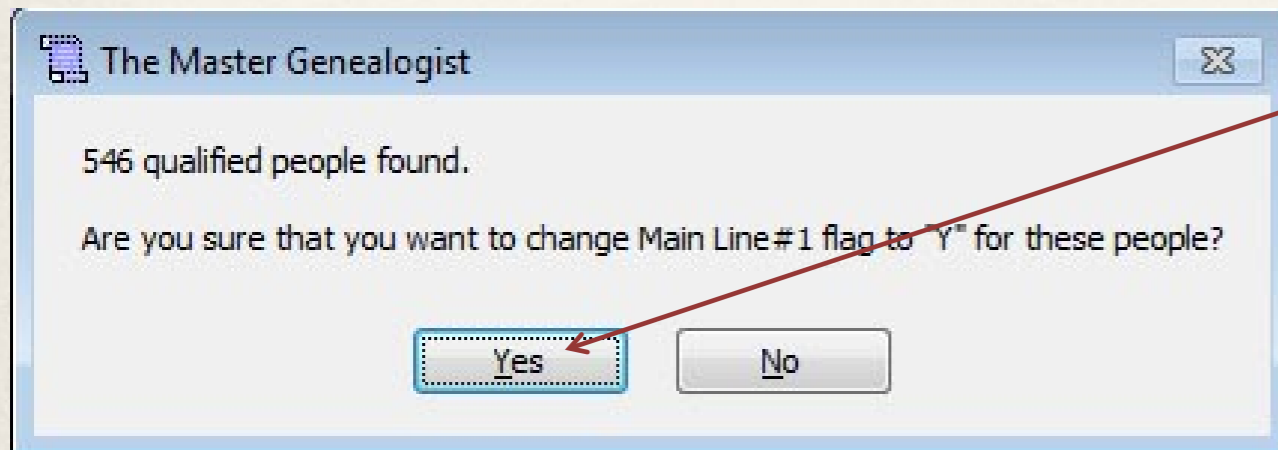Calculating columns for 546 people...

63%
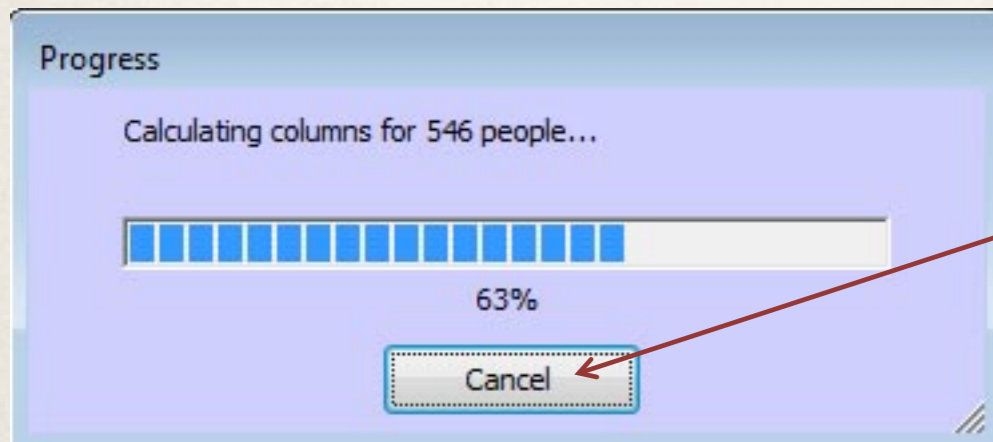
Cancel

A progress bar will appear as the report is being generated. There may be no need to review the content of the report, so we can cancel the report output by pressing the cancel button. This will NOT prevent the "Main Line" flags from being set.

Mallett	William	c 1740
Harvey	Rosamond	1740
Harvey	Rosamond	1740
Copplestone	Elizabeth	1759
Copplestone	Elizabeth	1759
Hole	Judith	1762
Hole	Judith	1762
Mallett	John	Apr 24, 1764
Mallett	William	Apr 3, 1767
Lander	Sarah	Nov 20, 1767
Lander	Sarah	Nov 20, 1767
Mallett	Isaac	Jul 18, 1769
Cowling	James	Jun 2, 1782
Dingle	Mary Ann	Sep 4, 1783
Dingle	Mary Ann	Sep 4, 1783
Symons	John	1785
Mallett	Elizabeth Ash	Oct 3, 1785
Rogers	Mary Ann	1788
Mallett	John Coppleston	May 17, 1788
Mallett	George	1790
Mallett	Jane	Dec 4, 1790
Mallett	Elizabeth Lande	1795

This is an excerpt from the List of People Report. Note that many people appear twice. These appear to be individuals who qualify as "Spouses" and as "Ancestors" at the same time, so the total number of 546 people identified by the filter is exaggerated somewhat.
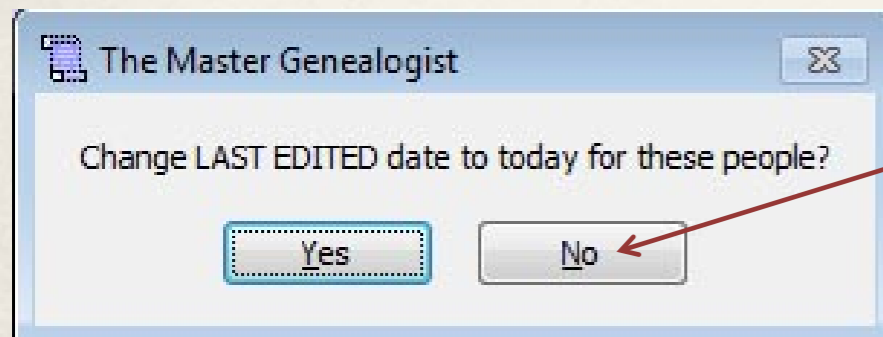
Identify the Main Line,
and set the Main Line Flag

The Master Genealogist ☒

546 qualified people found.

Are you sure that you want to change Main Line#1 flag to "Y" for these people?

[Yes]   [No]

Now we are prompted to change the "Main Line" flag. Click "Yes".

The Master Genealogist ☒

Flag changes are complete.
546 flags were prepared.

[OK]
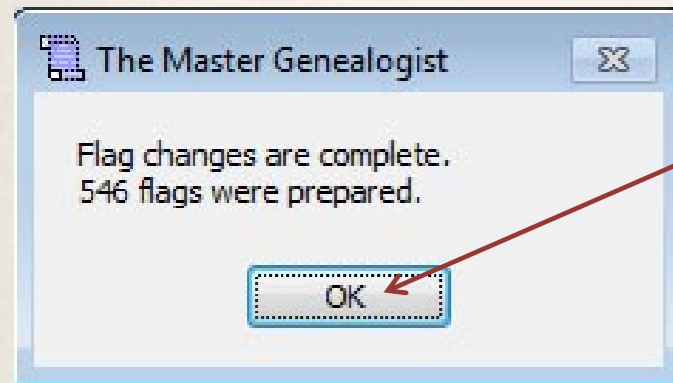
The flags have been changed. Click "OK". Now for all of those who qualified, the "Main Line" flag has been set to "Y".

The Master Genealogist ☒

Change LAST EDITED date to today for these people?

[Yes]   [No]

Should we change the "Last Edited Date" to today for the people whose flag has just been set? It's a matter of personal preference.

Identify those Connected to but Outside of the Main Line, and set the Connected Line Flag

Bring up the Report Definition screen for the List of People Report.

Click Add to add new filter criteria.

Identify those Connected to but Outside of the Main Line, and set the Connected Line Flag

Now we will read the values of the 2 flags that we created. If either is set to yes, then they meet the conditions of the filter, and we then add spouses, ancestors for 250 generations, and descendants for 250 generations. Save the new filter as "set connected lines".

We may need to run this report multiple times, in order to identify all of the people connected in some way to the main line. Each time we run the report, we will set the "Connected Line" flag for those people who meet the conditions of the filter.

Identify those Connected to but Outside of the Main Line, and set the Connected Line Flag

Click "OK"

Identify those Connected to but Outside of the Main Line, and set the Connected Line Flag

Click Options to bring up the Report Options screen, and then select the "Secondary Output" tab.

Identify those Connected to but Outside of the Main Line, and set the Connected Line Flag
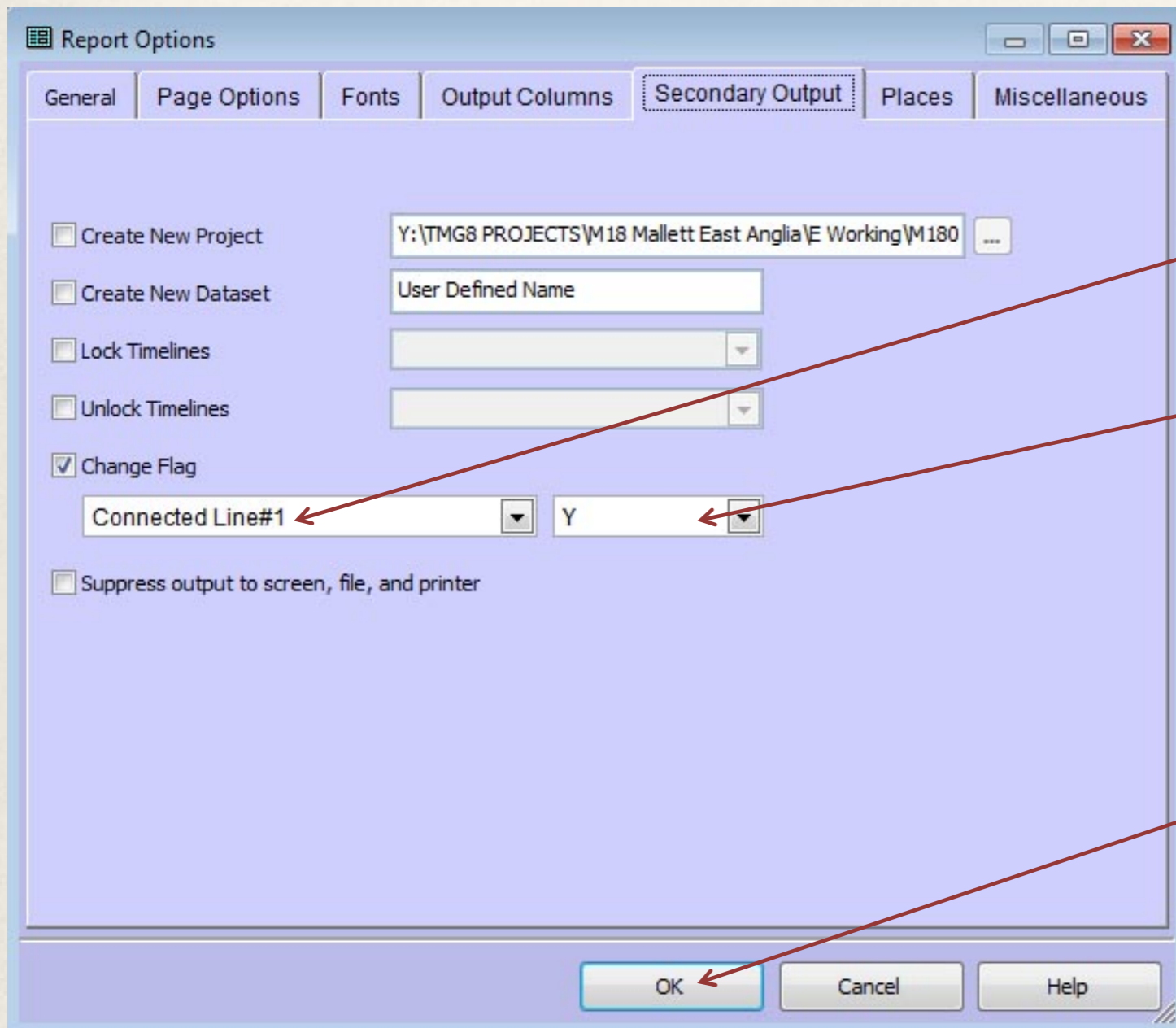
This is the "Secondary Output" screen.

Select the "Connected Line#1" flag from the drop down list box.

Select "Y" from the second drop down list box (flag value).

Click "OK"

Identify those Connected to but Outside of the Main Line, and set the Connected Line Flag

Save the new configuration as "Set Connected Line" (optional).

Click "Create Report".

Identify those Connected to but Outside of the Main Line, and set the Connected Line Flag

Filter progress

Clause 1 :	Main Line flag =	Equals Y :	472
Clause 2 :	Connected Line flag =	Equals Y :	0
Clause 3 :		(unused)	
Clause 4 :		(unused)	
Clause 5 :		(unused)	
Clause 6 :		(unused)	
Clause 7 :		(unused)	
Clause 8 :		(unused)	

Combined filter	472
Plus spouses	1
Plus ancestors	32
Plus descendants	7
Total people	512

☐ Do not close this window automatically

Close

This window will close automatically in 4 seconds

472 individuals have their "Main Line" flag set. Note that 546 were identified in the LOP report that set the Main Line flag in the first place. The difference being that certain individuals were identified as both spouses and ancestors in that exercise, but of course they each have only 1 flag.

There are 0 individuals with their "Connected Line" flag set, because this is the first time that we have run the report that will set this flag.

1 spouse, 32 ancestors, and 7 descendants have been found. All 512 will have their Connected Line flag set.

Identify the Main Line,
and set the Main Line Flag

The Master Genealogist ☒

512 qualified people found.

Are you sure that you want to change Connected Line #1 flag to "Y" for these people?

[Yes]   [No]
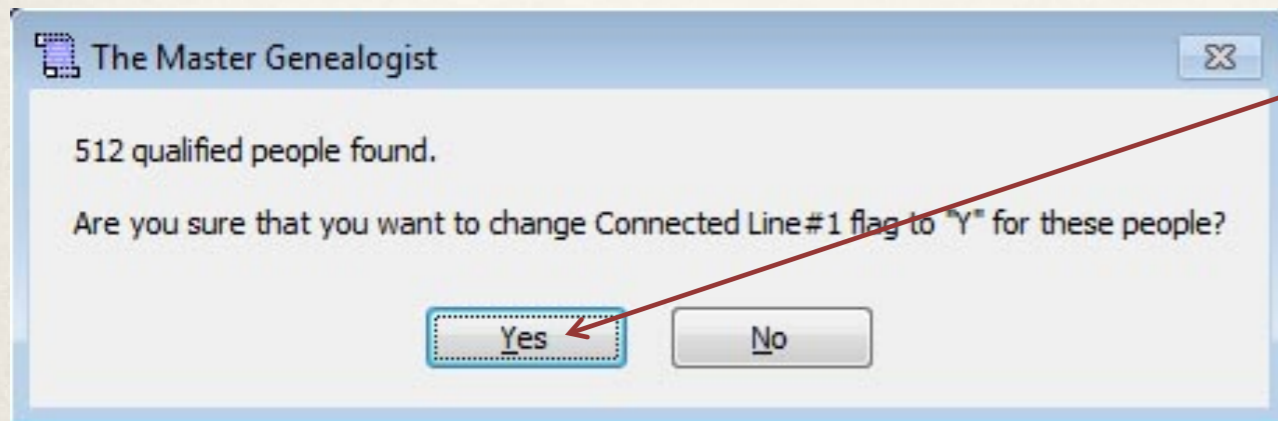
Now we are prompted to change the "Connected Line" flag. Click "Yes".
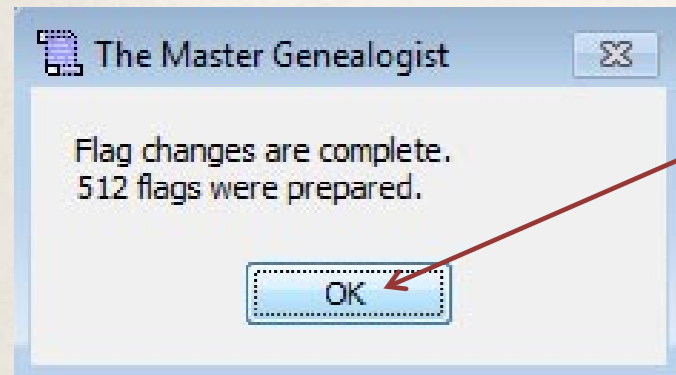
The Master Genealogist ☒

Flag changes are complete.
512 flags were prepared.

[OK]

The flags have been changed. Click "OK". Now for all of those who qualified, the "Connected Line" flag has been set to "Y".

The Master Genealogist ☒

Change LAST EDITED date to today for these people?

[Yes]   [No]

Should we change the "Last Edited Date" to today for the people whose flag has just been set? It's a matter of personal preference.

Identify those Connected to but Outside of the Main Line, and set the Connected Line Flag

Run the same report a second time. Click "Create Report".

Identify those Connected to but Outside of the Main Line, and set the Connected Line Flag

512 people from the previous report now have their Connected Line flag set.

5 more spouses and 6 more descendants have been found. All 523 will have their Connected Line flag set.

Identify those Connected to but Outside of the Main Line, and set the Connected Line Flag

Filter progress		— □ ✕
Clause 1 :	Main Line flag = Equals Y :	472
Clause 2 :	Connected Line flag = Equals Y :	525
Clause 3 :	(unused)	
Clause 4 :	(unused)	
Clause 5 :	(unused)	
Clause 6 :	(unused)	
Clause 7 :	(unused)	
Clause 8 :	(unused)	
	Combined filter	525
	Plus spouses	0
	Plus ancestors	0
	Plus descendants	0
	Total people	525

☐ Do not close this window automatically

Close

This window will close automatically in 3 seconds

Run the report multiple times until no more spouses, ancestors, or descendants are found. In this case we have 525 people in total, either in the main line or connected to it in some way.

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

Create a new List of People report to display those people that are outside of the main line but connected to it in some way.

Click "Add".

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

Save the Filter as "read connected lines".

We want to exclude the main line, and include the connected lines.

"Main Line <> Does Not Equal Y
And
Connected Line = Equals Y"

Note that the "And then add their..." tick boxes are no longer ticked. We don't want to add any additional people to those that meet the criteria of the filter from this point on.

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

Click "OK".

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

The "Connected Line" flag may still be enabled, but we don't want to set it anymore.

Click "Options" to bring up the "Report Options" screen, then select the "Secondary Output" tab.

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

Make sure the "Change Flag" tick box is unticked.

Click "OK".

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

Click "Create Report.

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

64 people do not have their Main Line flag set, and 53 of them also have their Connected Line flag set.
This means that 53 people are outside of the main line but connected to it.
It also means that 11 people have neither flag set, so are not connected to the main line in any way.

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

Lander	Simon	Jul 14, 1689	118
Lander	Philadelphia	Aug 21, 1714	120
Lander	Nicholas	May 9, 1717	117
Lander	Grace	Apr 5, 1719	116
Lander	William	Mar 24, 1721	115
Lander	Susanna	Aug 9, 1724	114
Lander	Edward	Mar 29, 1733	113
Lander	Thomas	Jun 12, 1757	108
Lander	Simon	Jan 25, 1761	110
Lander	Joan	Apr 14, 1765	109
Lander	Dorothy	Jul 22, 1770	111
Lander	Simon	Mar 15, 1778	112
Northey	Robert	1807	179
Sarah		1809	180
Annie		1831	169
Annie		1831	498
Thomas	William	1836	388
Eliza		1837	389
Bolt	John	1839	340
Maria		1839	470
Kellaway	Mary Ann	1840	341
Oliver	Marsena	1845	469
Veale	Henry	1849	257
Bastow	Sarah	1851	258
Crowhurst	James	1854	55
?	Rose	1855	133
Hornsby	Richard Samuel	1855	369
House	Ellen	1855	385
Brice	James	1859	384
Bolt	Eliza Kate	1860	370
Westlake	John	1861	421
Davey	Emma	1862	422
Denner	Henry	1864	386
Ellen	Emma	1866	484
Heath	George Henry	1867	483
Simmons	Jessamine Flore	1867	387
Haywood	Philip	1871	381
Davies	Mary Emma	1872	382
Gadd	Elizabeth	1872	294
Wedlock	Herbert	1872	293

This is an excerpt from the LOP report that we just created, showing the 53 people who are connected to the main line. Are there any of interest that we wish to keep?

If so, we need to change their "Main Line" flag to "Y", either manually, or automatically through a LOP report.

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

Create another LOP report, this time to capture the 11 people who have neither their Main Line flag nor their Connected Line flag set.

"Connected Line = Equals N"

Save the filter as "unconnected".

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

Filter progress

Clause 1 :	Connected Line flag =	Equals N :	11
Clause 2 :		(unused)	
Clause 3 :		(unused)	
Clause 4 :		(unused)	
Clause 5 :		(unused)	
Clause 6 :		(unused)	
Clause 7 :		(unused)	
Clause 8 :		(unused)	
	Combined filter		11
	Plus spouses		-------
	Plus ancestors		-------
	Plus descendants		-------
	Total people		11

☐ Do not close this window automatically

Close

This window will close automatically in 4 seconds

11 people meet the conditions of the filter, as expected.

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project
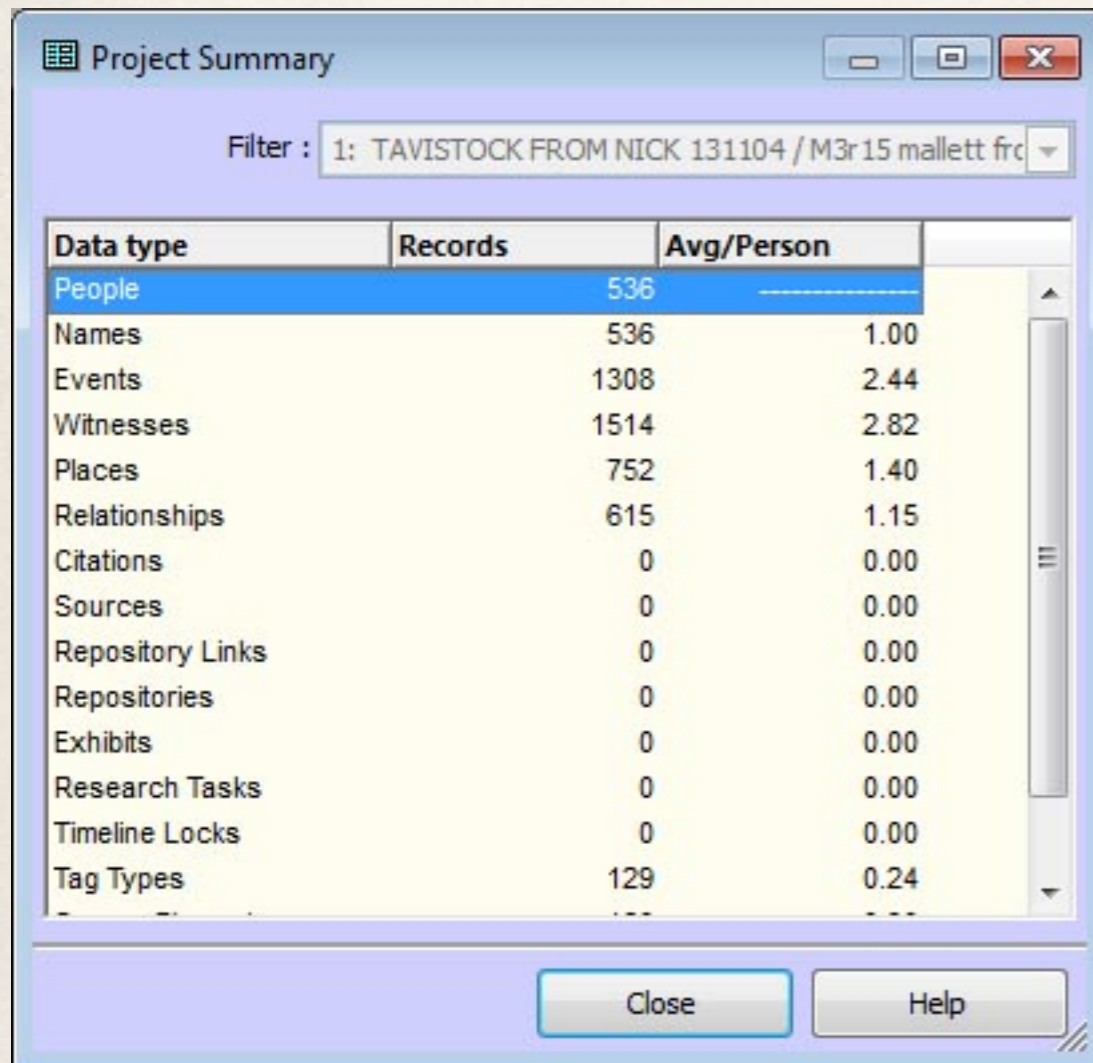
List of Selected People

Surname	Given Name	Birth Date	Birth City	Birth County	ID Num
Barber	William				121
Burrows	Esther Lillian				231
Combe	Joan				477
Gliddon	Elizabeth				534
Westaway	Thomas				210
Mallett	John Gliddon	Nov 29, 1784			537
Mallett	Jane Gliddon	Jun 10, 1787			535
Seckham	Richard	Jun 30, 1790			200
Mallett	William H R	Sep, 1911			232
Burgess	Thomas	1971			300
Humphreys	Gareth James	1981			301

These are the 11 people who aren't connected in any way to the Main Line.

Each should be checked to find out why. Perhaps they should be connected, or maybe they're data entry errors, or completely separate and unrelated lines that can simply be ignored.

Analyse those Outside of the Main Line, and Decide if there are any of those that we wish to keep in our new Project

Have we found everyone?

There are 536 people in the project according to the project summary.

472 people have the Main Line flag set.
53 are connected to the main line
11 are unconnected.

472 + 53 + 11 = 536.

Create a New TMG Project based on the "Main Line" Flag

Report Filter

Save Filter As: read main line

For example: People born in Virginia

| Filter | Query by Example |

(	* Field	Subfield	Operator	Value	)	Connect
	Main Line ▼	▼	= Equals ▼	Y		END ▼

And then add their

☐ Spouses   ☐ Ancestors 2 generations   ☐ Descendants 250 generations

OK ←   Load...   Clear   Cancel   Help

Create one more LOP report, this time to capture all of the people who have their Main Line flag set.

"Main Line = Equals Y"

Save the filter as "read main line".

All of the people who qualify for this report will be exported to a new project.

Click "OK"

Create a New TMG Project
based on the "Main Line" Flag

Click "Options..." to bring up the "Report Options" screen, then click the "Secondary Output" tab
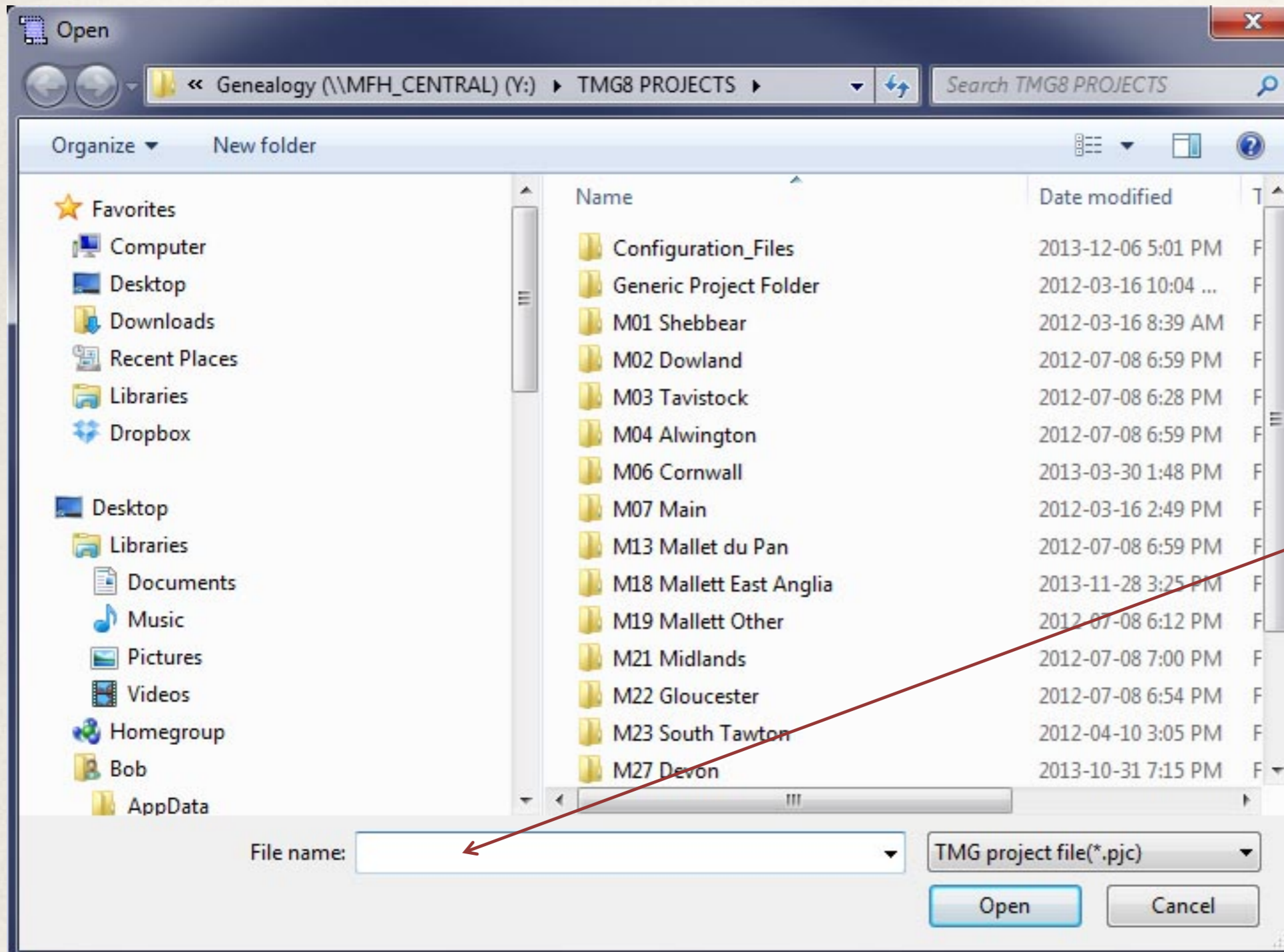
Create a New TMG Project based on the "Main Line" Flag

Tick the "Create New Project" tick box.

Click the ellipsis to bring up a File "Open" dialog box where we can give the new project a name, and choose a file location to save it to.
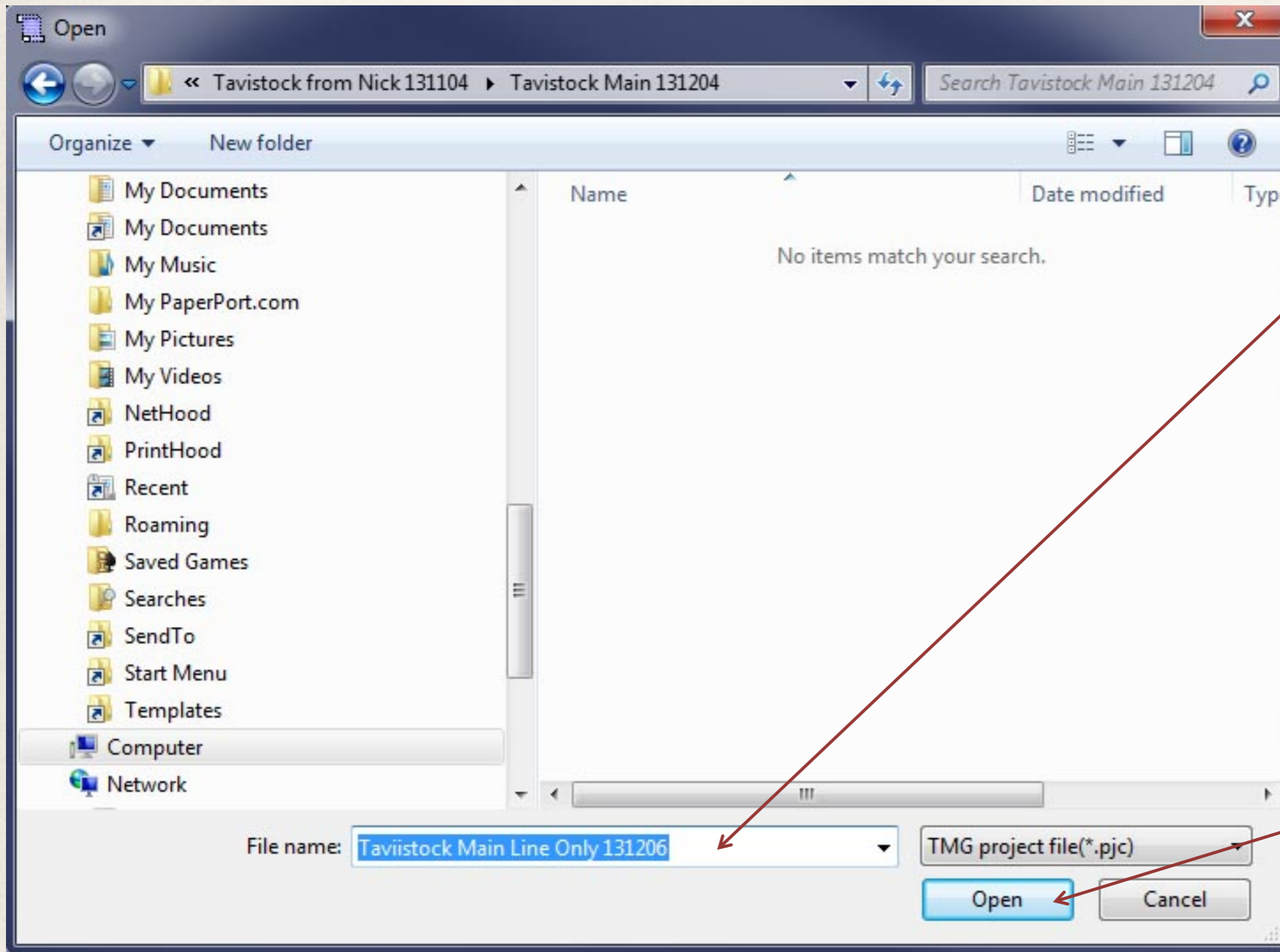
Click "OK"

Create a New TMG Project
based on the "Main Line" Flag

By default this dialog opens to the "Default Project Path", set under "Program Preferences", "Program Options", "General".

Give the new project a name, and choose a location for it. You can create a folder for it during this process if you wish.

Create a New TMG Project
based on the "Main Line" Flag

The new project's name will be "Tavistock Main Line Only 131206.pjc", and will be saved in the folder "Tavistock Main 131204".

The project hasn't been created yet.

Click "Open"

Create a New TMG Project based on the "Main Line" Flag

Report Options

General | Page Options | Fonts | Output Columns | Secondary Output | Places | Miscellaneous

☑ Create New Project   Y:\TMG8 PROJECTS\M03 Tavistock\E Working\Tavistock from [...]

☐ Create New Dataset   User Defined Name

☐ Lock Timelines

☐ Unlock Timelines

☐ Change Flag

    Main Line#1   ▼   Y   ▼

☐ Suppress output to screen, file, and printer

OK   Cancel   Help

Click "OK"

Create a New TMG Project
based on the "Main Line" Flag

Click "Create Report".

Create a New TMG Project
based on the "Main Line" Flag
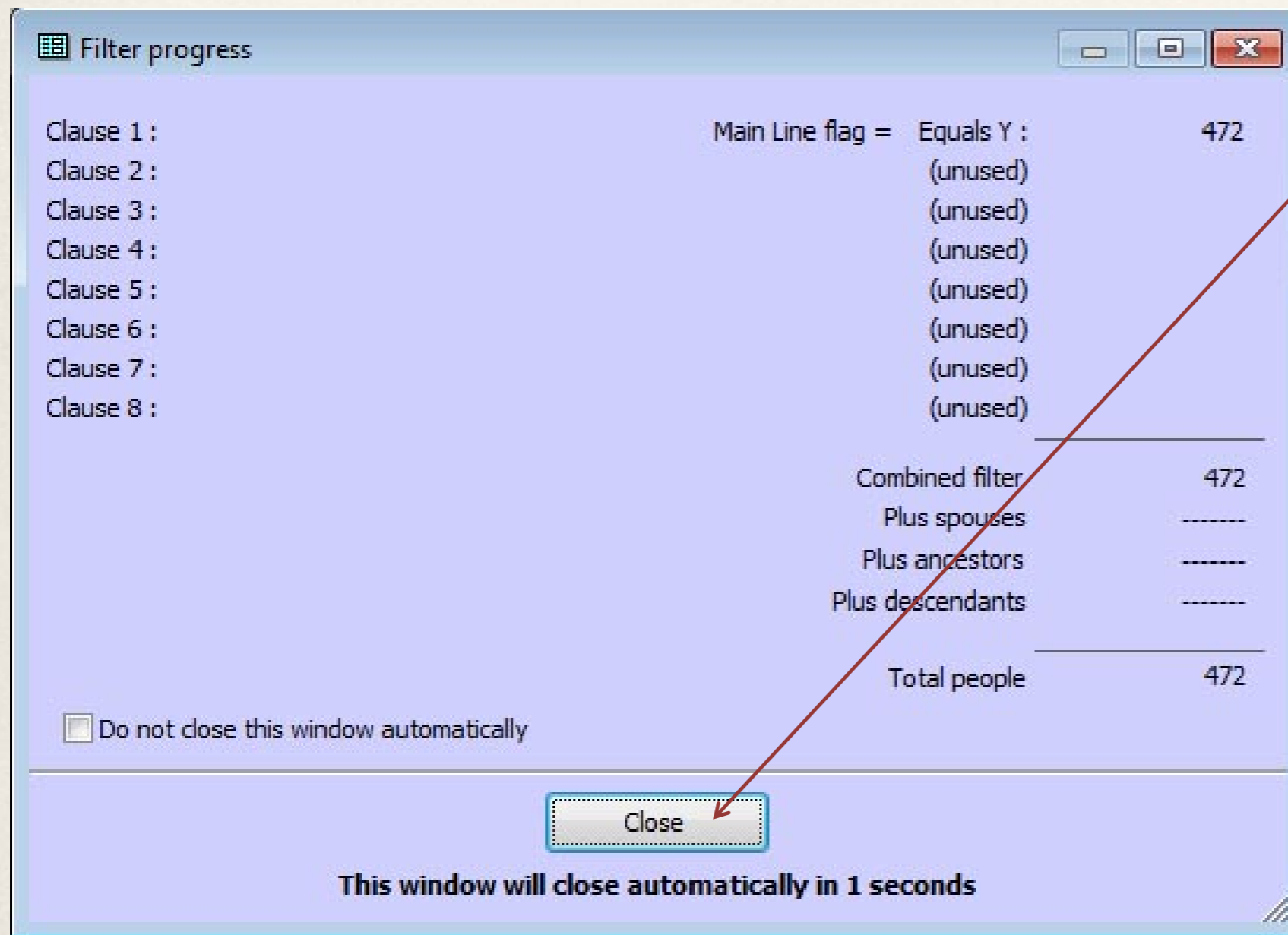
472 people have their "Main Line" flag set.

Click "Close" (or wait 4 seconds).
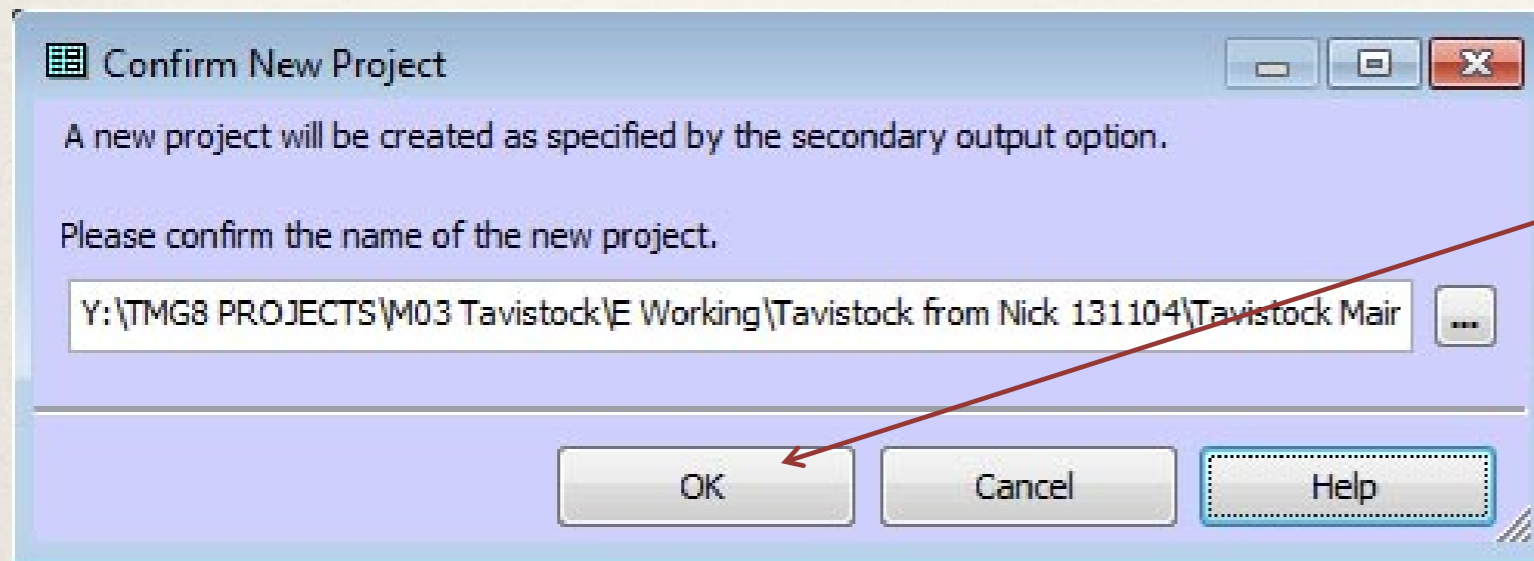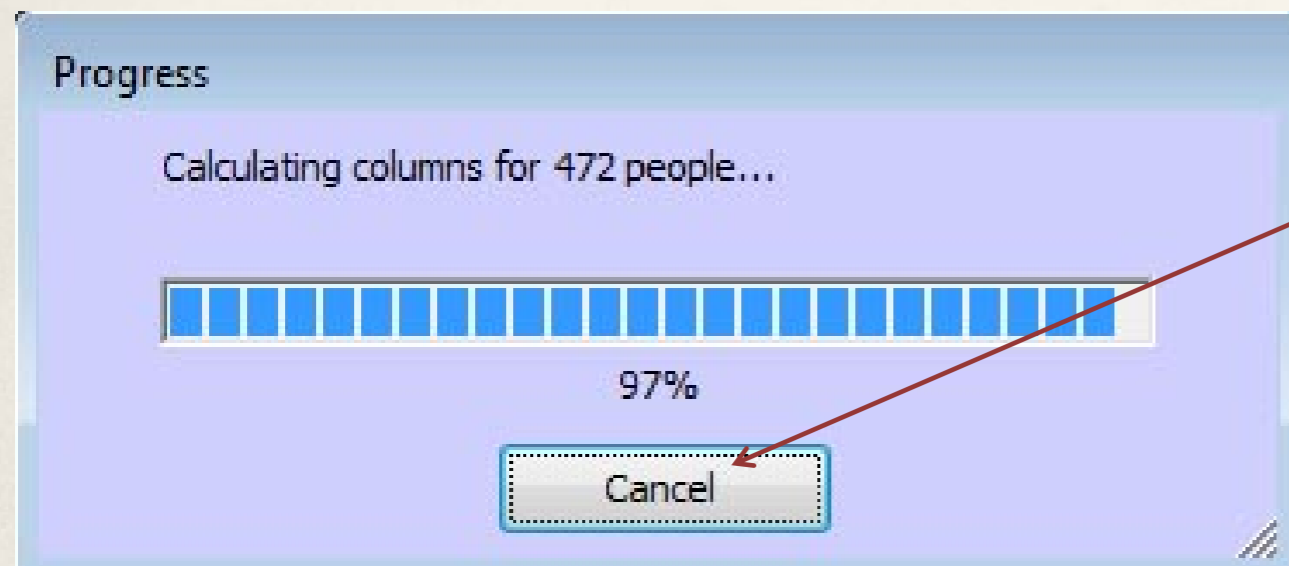
Create a New TMG Project
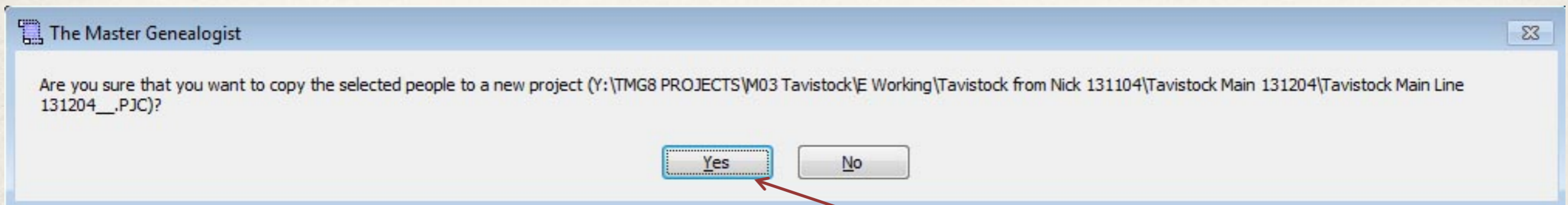# based on the "Main Line" Flag

Confirm New Project

A new project will be created as specified by the secondary output option.

Please confirm the name of the new project.

Y:\TMG8 PROJECTS\M03 Tavistock\E Working\Tavistock from Nick 131104\Tavistock Mair

OK   Cancel   Help

The "Confirm New Project" window opens, asking us if we want to create the new project.

Click "OK".

Progress

Calculating columns for 472 people...
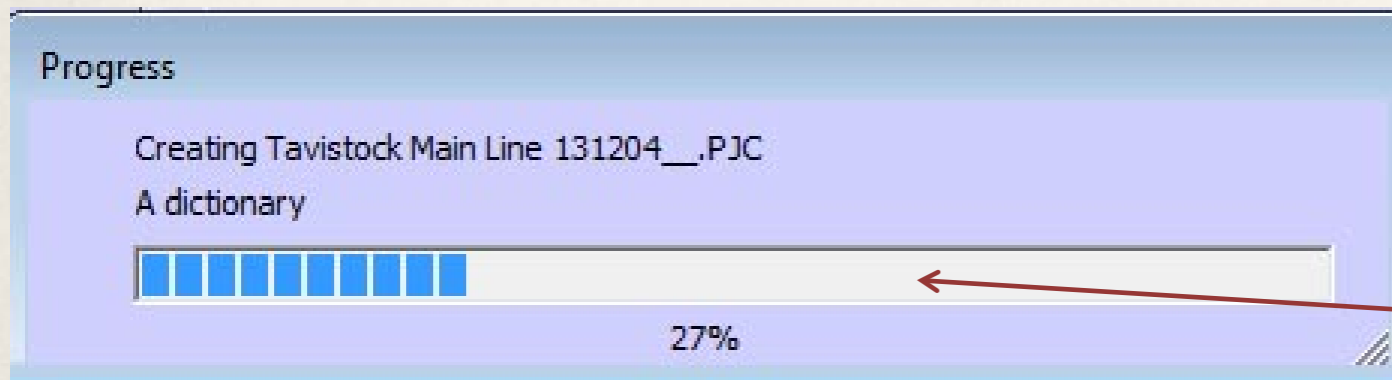
97%

Cancel

This progress bar is presented as the text report is being generated. We don't really need to view this report, so press cancel. This won't prevent us from creating the new project.

Create a New TMG Project
based on the "Main Line" Flag

The Master Genealogist

Are you sure that you want to copy the selected people to a new project (Y:\TMG8 PROJECTS\M03 Tavistock\E Working\Tavistock from Nick 131104\Tavistock Main 131204\Tavistock Main Line 131204__.PJC)?

Yes   No

Are you sure you want to create the new project? Click "Yes".

Progress

Creating Tavistock Main Line 131204__.PJC
A dictionary

27%

A progess bar is presented as the project is being created.

The Master Genealogist

The new project has been created.

OK

The new project has been created. Click OK.

Create a New TMG Project
based on the "Main Line" Flag

William Mallett is still number 1, and there are 472 people in the new project. All people in the new project have the same ID numbers as in the project that we extracted them from. We may wish to renumber them, or we may have reason to leave them as they are. We may also wish to delete the "Main Line" and "Connected Line" flags, since they no longer have a purpose.