

Creating a Subset from a TMG Project

Presented by
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Introduction

Sharing a TMG project with another TMG user is as simple as giving them a copy of the .sqz backup file. However, there may be times when the person with whom you are sharing is interested in only a particular line of descent.

Creating a new project from an existing project may not be considered to be intuitive for some, hence the need to present a method that works. The following procedure involves the use of a Focus Group and a List of People Report.

This presentation will feature TMG ver. 8.08.

Choose the progenitor of interest from your main project.

Tristram Coffyn (1605-1681)

Details

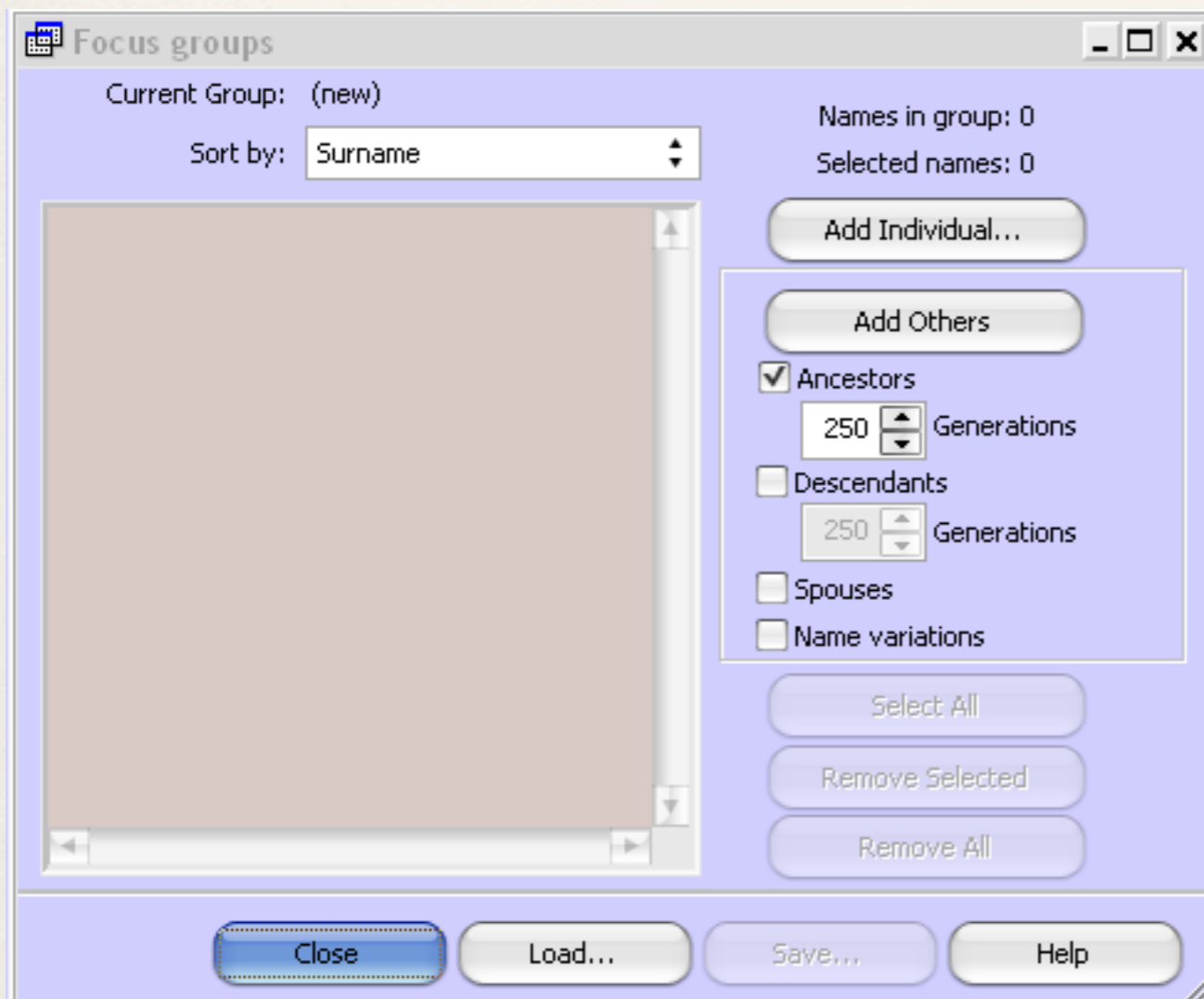
Person Family Tree

Type	Name	Type	Value
Name	Tristram COFFYN (94574) (1605-1681)	Reference	
Father	Peter COFFYN (94576) (-1628)	Soundex	C150
Mother	Johanna (94577)	Tag count	17

Type	Date	Name/Place	Age	M	S	E	T
Relation >		9th great-grandfather of David Arthur WALKER (1) b. 21 Jun 1944					
Name-Var		Tristram COFFIN			✓		
* Birth	1605	Brixton Parish, Plymouth, Devonshire, England	~0		✓		
Baptism	11 Mar 1610		~5		✓		
* Marriage	1630	Dionis STEVENS (94575); (probably) Devonshire, England	~25		✓		
* Son-Bio	1631	Peter COFFIN (95033); Brixton, Devonshire, England	~26		✓		
* Son-Bio	1632	Tristram COFFIN Jr. (95037); probably, Brixton, England	~27		✓		
* Dau-Bio	1635	Elizabeth COFFIN (95042); England	~30		✓		
* Son-Bio	12 Aug 1640	Hon. James COFFIN (94572); Brixton, Devonshire, England	~35		✓		
* Son-Bio		John COFFIN (95044); England			✓		
* Immigratr	1642	Newbury, Massachusetts, accompanying Tristram were his wife, five small children, his widowed	~37	✓	✓		
* Dau-Bio	16 Nov 1642	Deborah COFFIN (95045); Haverhill, Massachusetts	~37		✓		
* Dau-Bio	20 Feb 1645	Mary COFFIN (95046); Haverhill, Massachusetts	~40		✓		
* Son-Bio	20 Oct 1647	Lieutenant John COFFIN (95048); Haverhill, Massachusetts	~42		✓		
* Son-Bio	10 May 1652	Stephen COFFIN (95052); Newbury, Massachusetts	~47		✓		
* Settled	1660	Nantucket, Massachusetts, ; he was successively of Haverhill, Newbury, Salisbury and Nantucket.	~55	✓	✓		
* Death	03 Oct 1681	Nantucket, Massachusetts	~76		✓		

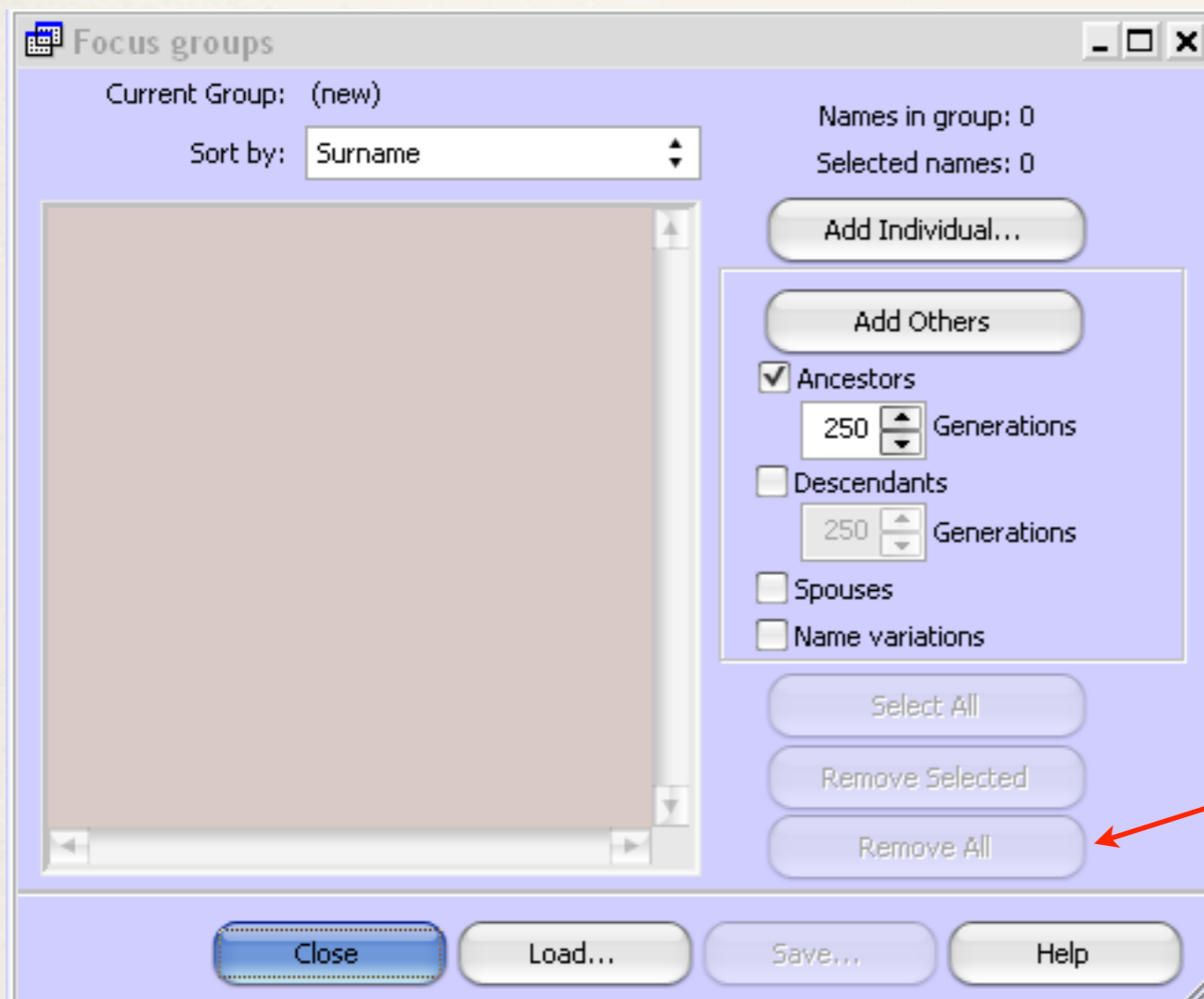
Add
Edit
Delete
Primary

Click on Focus Group from the TMG Windows Drop-down Menu



The Focus Group window should appear empty of names, as shown here.

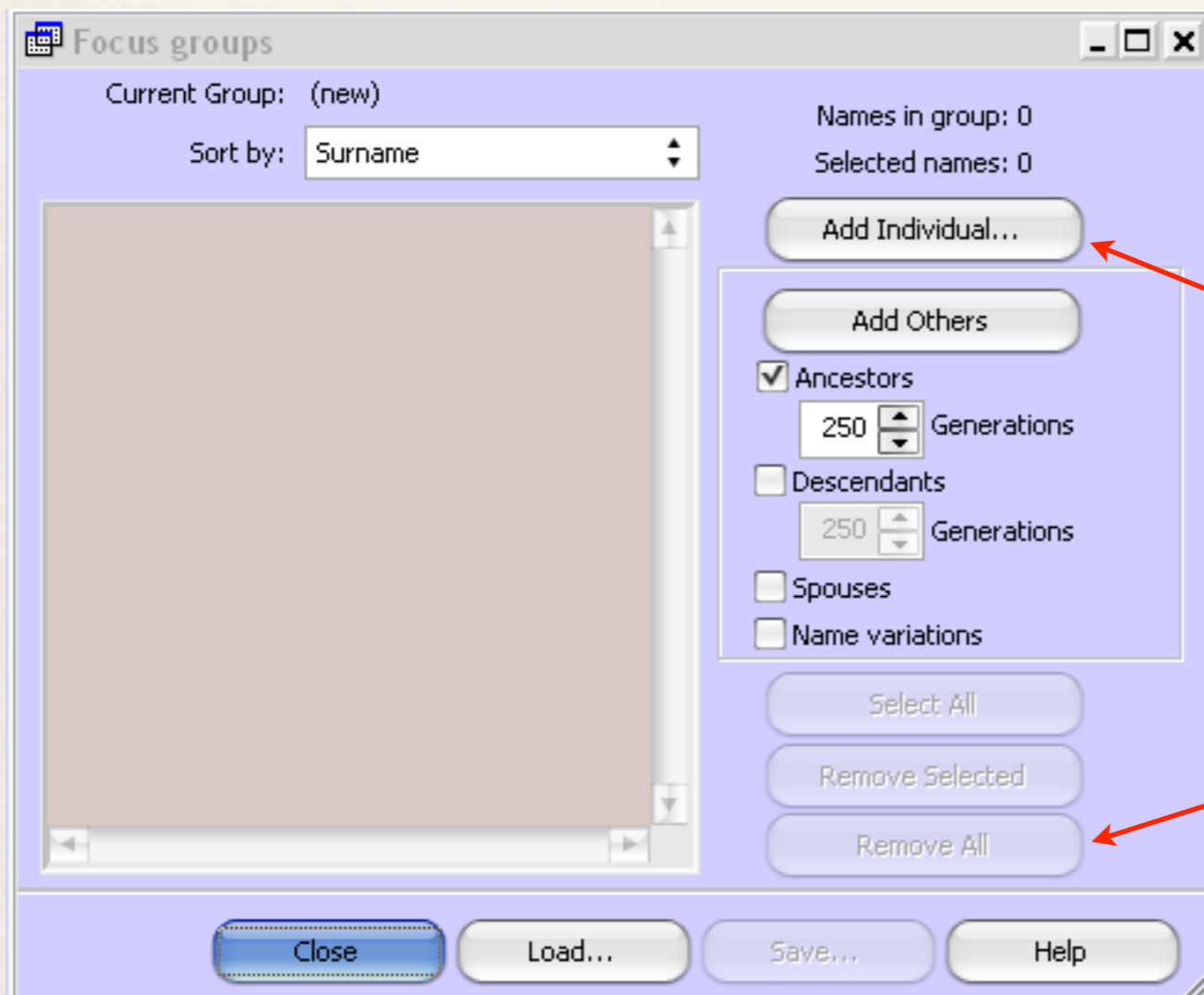
Click on Focus Group from the TMG Windows Drop-down Menu



The Focus Group window should appear empty of names, as shown here.

1. If there are people listed from a previous exercise, click 'Remove All'.

Click on Focus Group from the TMG Windows Drop-down Menu



The Focus Group window should appear empty of names, as shown here.

2. Click 'Add Individual'

1. If there are people listed from a previous exercise, click 'Remove All'.

Focus Group

Details

Person Family Tree

Type	Name
Name	Tristram COFFYN (94574) (1605-1681)
Father	Peter COFFYN (94576) (-1628)
Mother	Johanna (94577)

Type	Date	Name/Place
Relation >		9th great-grandfather of David Arthur WALKER (1) b. 21
Name-Var		Tristram COFFIN

* Birth

Baptis

* Marri

* Son-E

* Son-E


* Dau-E

* Son-E

* Son-E

* Immic

Add new member to Focus Group

94574  Tristram COFFYN (94574) b. 1605, d. 03 O

OK Cancel Help

Focus Group

Details

Person Family Tree

Type	Name
Name	Tristram COFFYN (94574) (1605-1681)
Father	Peter COFFYN (94576) (-1628)
Mother	Johanna (94577)

Type	Date	Name/Place
Relation >		9th great-grandfather of David Arthur WALKER (1) b. 21
Name-Var		Tristram COFFIN

* Birth

Baptis

* Marri

* Son-E

* Son-E


* Dau-E

* Son-E

* Son-E

* Immic

Add new member to Focus Group

94574  Tristram COFFYN (94574) b. 1605, d. 03 O

OK Cancel Help

1. Enter the TMG ID for the progenitor of interest.

Focus Group

The screenshot shows a genealogy software interface. The main window is titled 'Details' and has tabs for 'Person', 'Family', and 'Tree'. The 'Person' tab is active, showing a table with columns 'Type' and 'Name'. The first row is highlighted in purple and contains 'Tristram COFFYN (94574) (-1605-1681)'. Below this, 'Father' is listed as 'Peter COFFYN (94576) (-1628)' and 'Mother' as 'Johanna (94577)'. A second table below has columns 'Type', 'Date', and 'Name/Place'. The first row is highlighted in cyan and contains '9th great-grandfather of David Arthur WALKER (1) b. 21'. Below this, 'Name-Var' is listed as 'Tristram COFFIN'. An 'Add new member to Focus Group' dialog box is open in the foreground. It has a text input field containing '94574' and a button with a person icon. To the right of the icon is the text 'Tristram COFFYN (94574) b. 1605, d. 03 O'. At the bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons. Red arrows point from the text on the right to the TMG ID '94574' in the dialog and the highlighted name in the main window.

Type	Name
Name	Tristram COFFYN (94574) (-1605-1681)
Father	Peter COFFYN (94576) (-1628)
Mother	Johanna (94577)

Type	Date	Name/Place
Relation >		9th great-grandfather of David Arthur WALKER (1) b. 21
Name-Var		Tristram COFFIN

* Birth
Baptis
* Marri
* Son-E
* Son-E
* Dau-E
* Son-E
* Son-E
* Immic

Add new member to Focus Group

94574 Tristram COFFYN (94574) b. 1605, d. 03 O

OK Cancel Help

1. Enter the TMG ID for the progenitor of interest.

Focus Group

The screenshot shows a genealogy software interface. The main window is titled 'Details' and has tabs for 'Person', 'Family', and 'Tree'. The 'Person' tab is active, showing a list of details for a person named Tristram COFFYN (94574) (1605-1681). The details include Name, Father (Peter COFFYN (94576) (-1628)), and Mother (Johanna (94577)). Below this, there is a table with columns 'Type', 'Date', and 'Name/Place'. The first row shows 'Relation >' with the value '9th great-grandfather of David Arthur WALKER (1) b. 21'. The second row shows 'Name-Var' with the value 'Tristram COFFIN'. An 'Add new member to Focus Group' dialog box is open in the foreground. It has a text input field containing '94574' and a preview area showing a person icon and the text 'Tristram COFFYN (94574) b. 1605, d. 03 O'. At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Help'.

Type	Name
Name	Tristram COFFYN (94574) (1605-1681)
Father	Peter COFFYN (94576) (-1628)
Mother	Johanna (94577)

Type	Date	Name/Place
Relation >		9th great-grandfather of David Arthur WALKER (1) b. 21
Name-Var		Tristram COFFIN

* Birth
Baptis
* Marri
* Son-E
* Son-E
* Dau-E
* Son-E
* Son-E
* Immic

Add new member to Focus Group

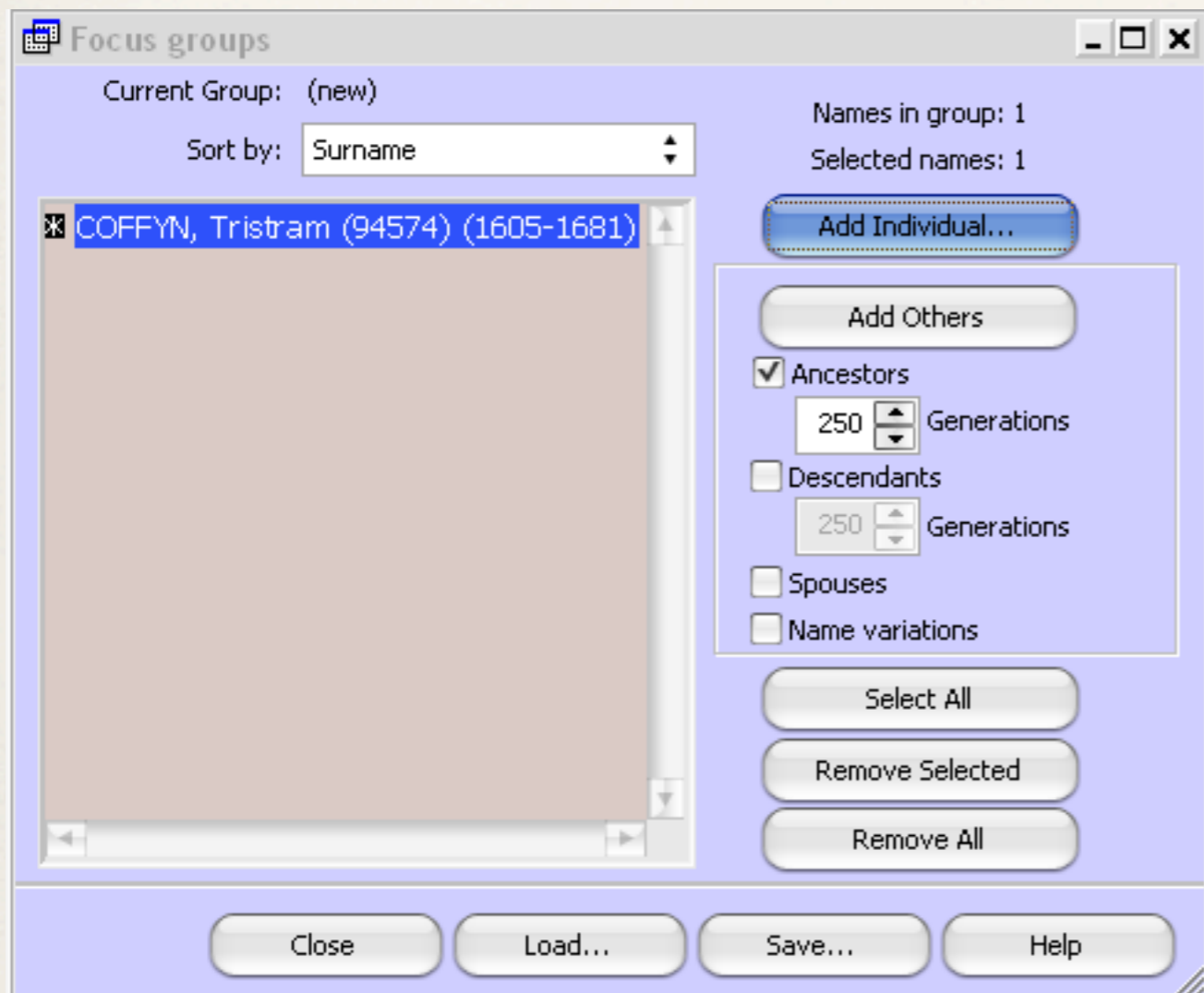
94574 Tristram COFFYN (94574) b. 1605, d. 03 O

OK Cancel Help

1. Enter the TMG ID for the progenitor of interest.

2. Click OK

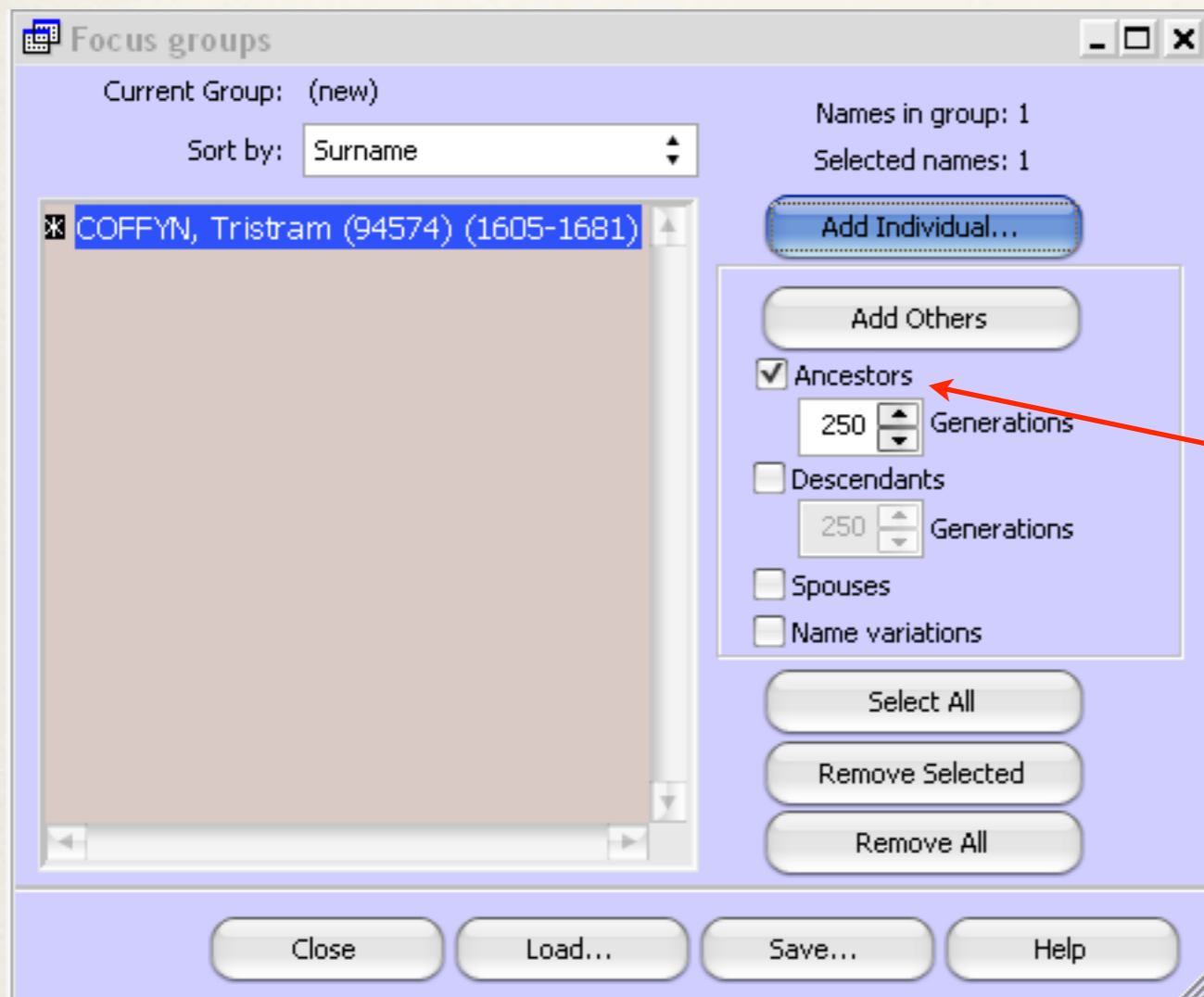
Focus Group



This is the starting point in the Focus Group.

Since the interest for this exercise is to create a line of descent from Tristram Coffyn, do the following.

Focus Group

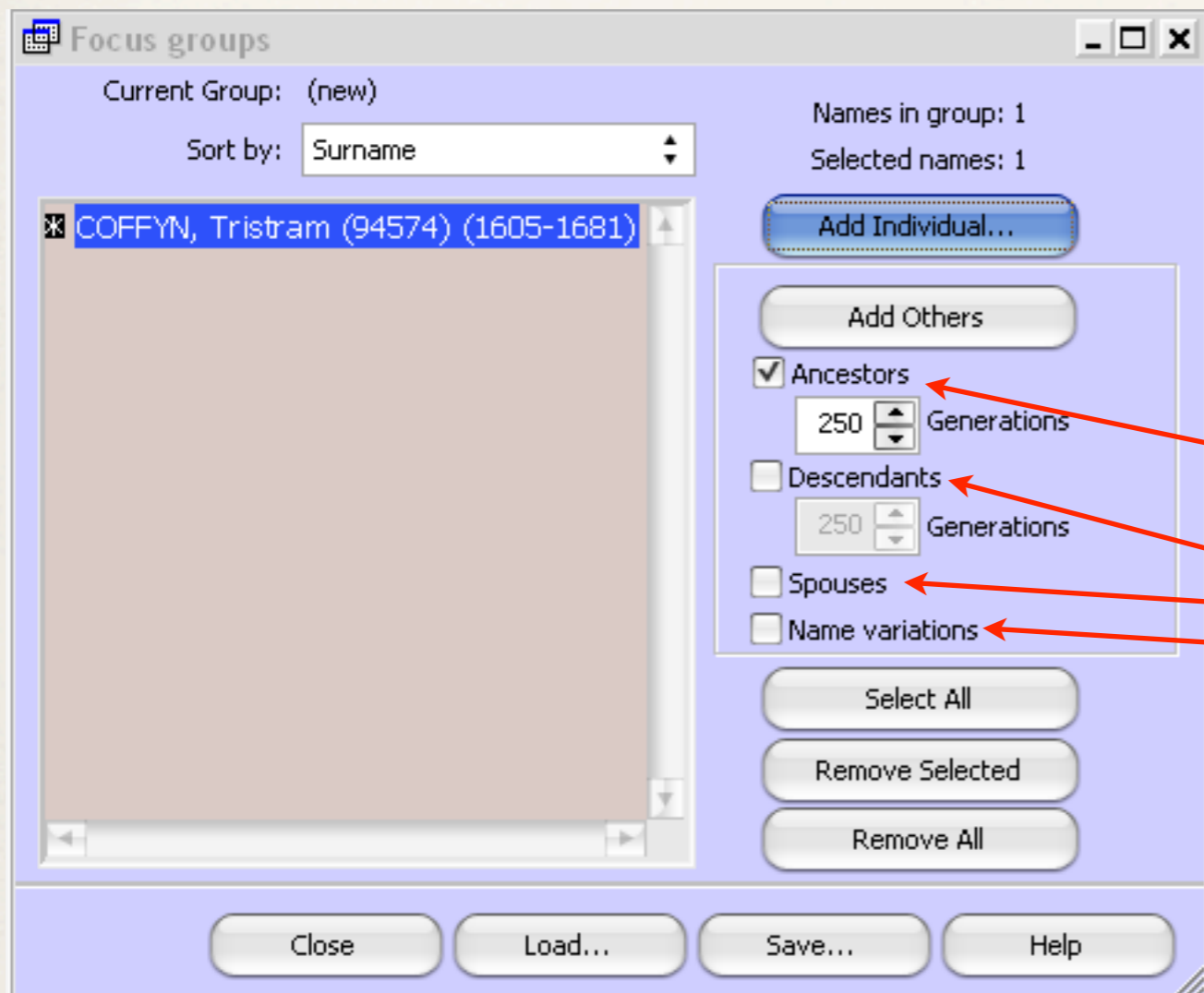


This is the starting point in the Focus Group.

Since the interest for this exercise is to create a line of descent from Tristram Coffyn, do the following.

1. Uncheck Ancestors.

Focus Group

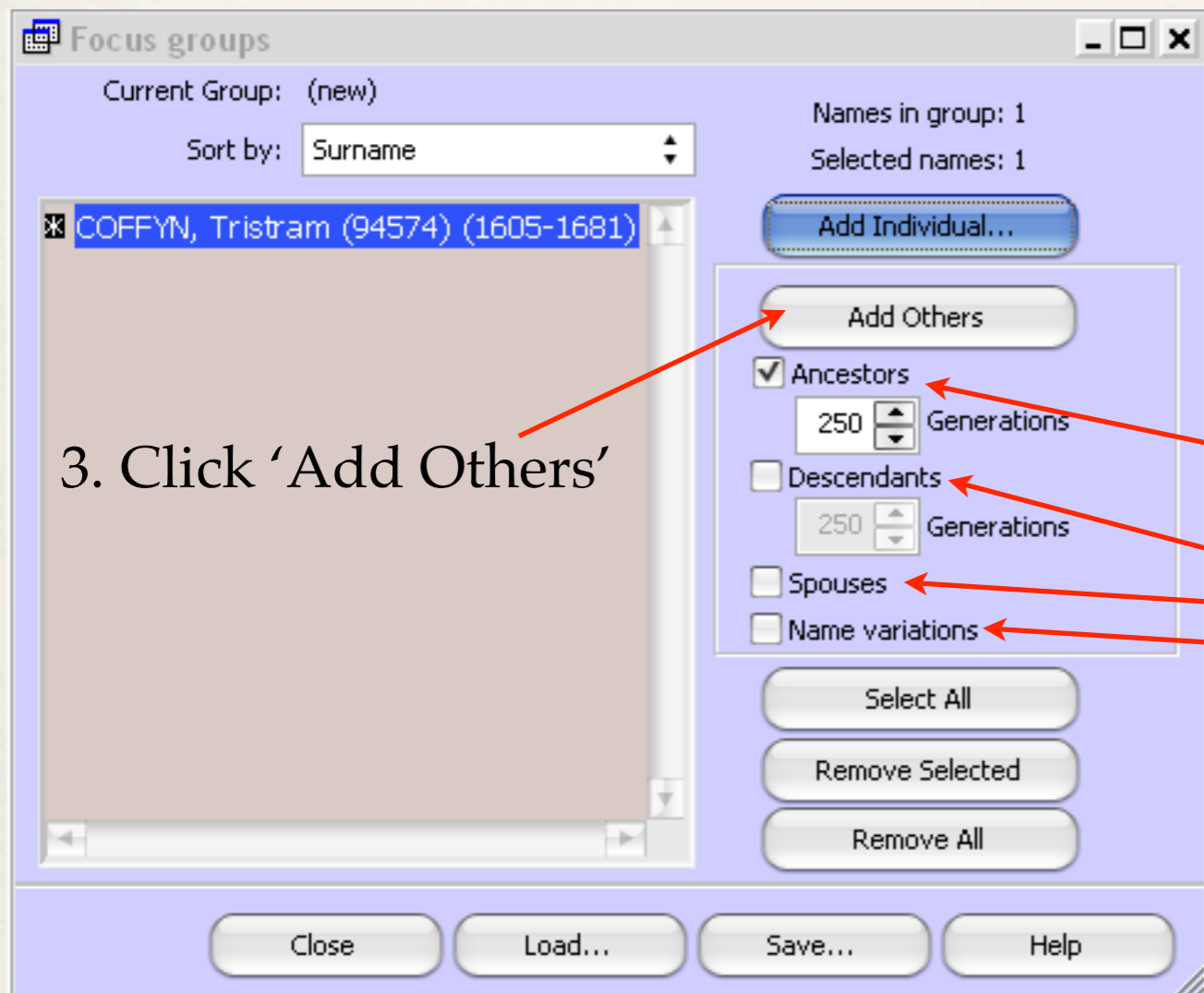


This is the starting point in the Focus Group.

Since the interest for this exercise is to create a line of descent from Tristram Coffyn, do the following.

1. Uncheck Ancestors.
2. Check Descendants, Spouses & Name Variations.

Focus Group



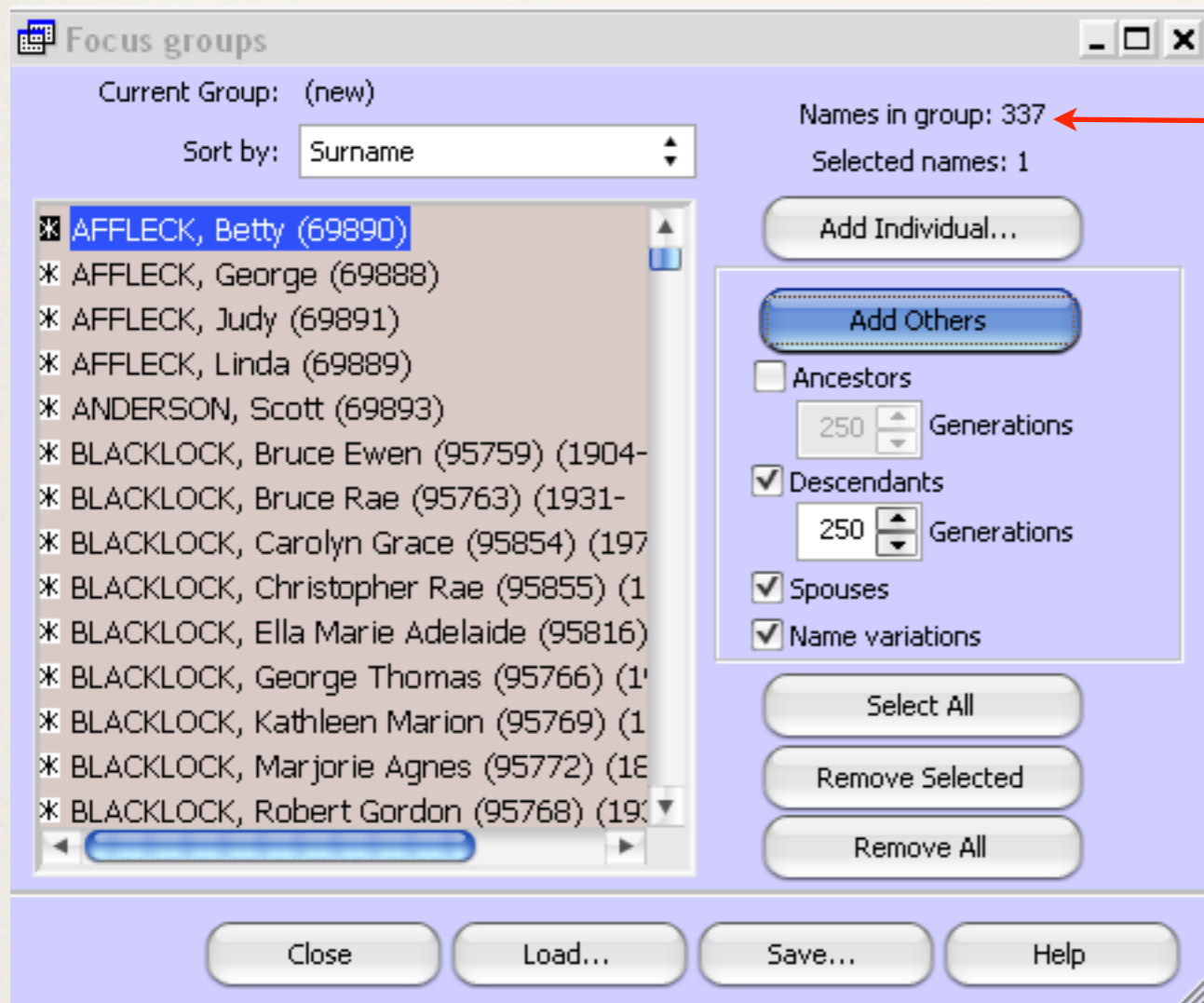
This is the starting point in the Focus Group.

Since the interest for this exercise is to create a line of descent from Tristram Coffyn, do the following.

1. Uncheck Ancestors.

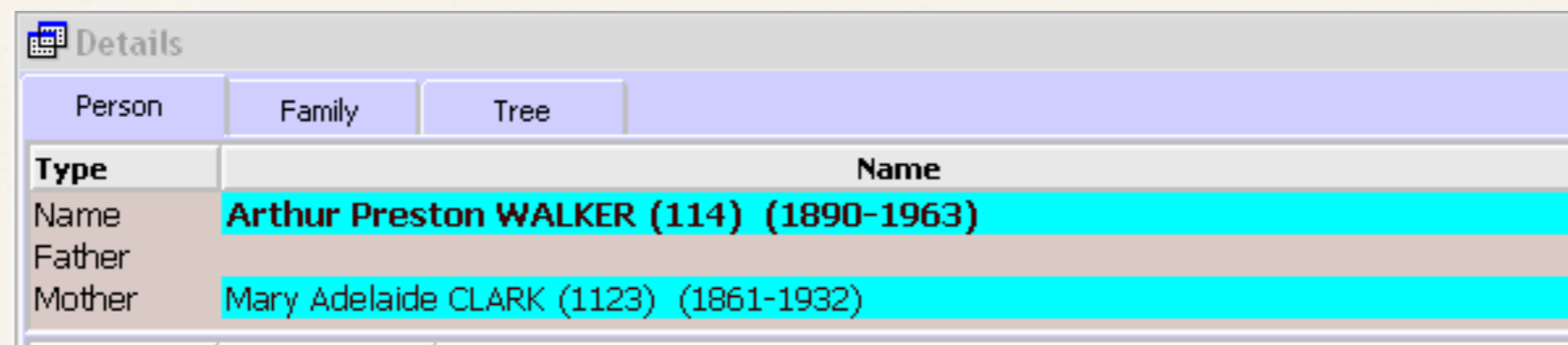
2. Check Descendants, Spouses & Name Variations.

Focus Group



This is the first iteration, with a list of 337 names.

Result From First Iteration



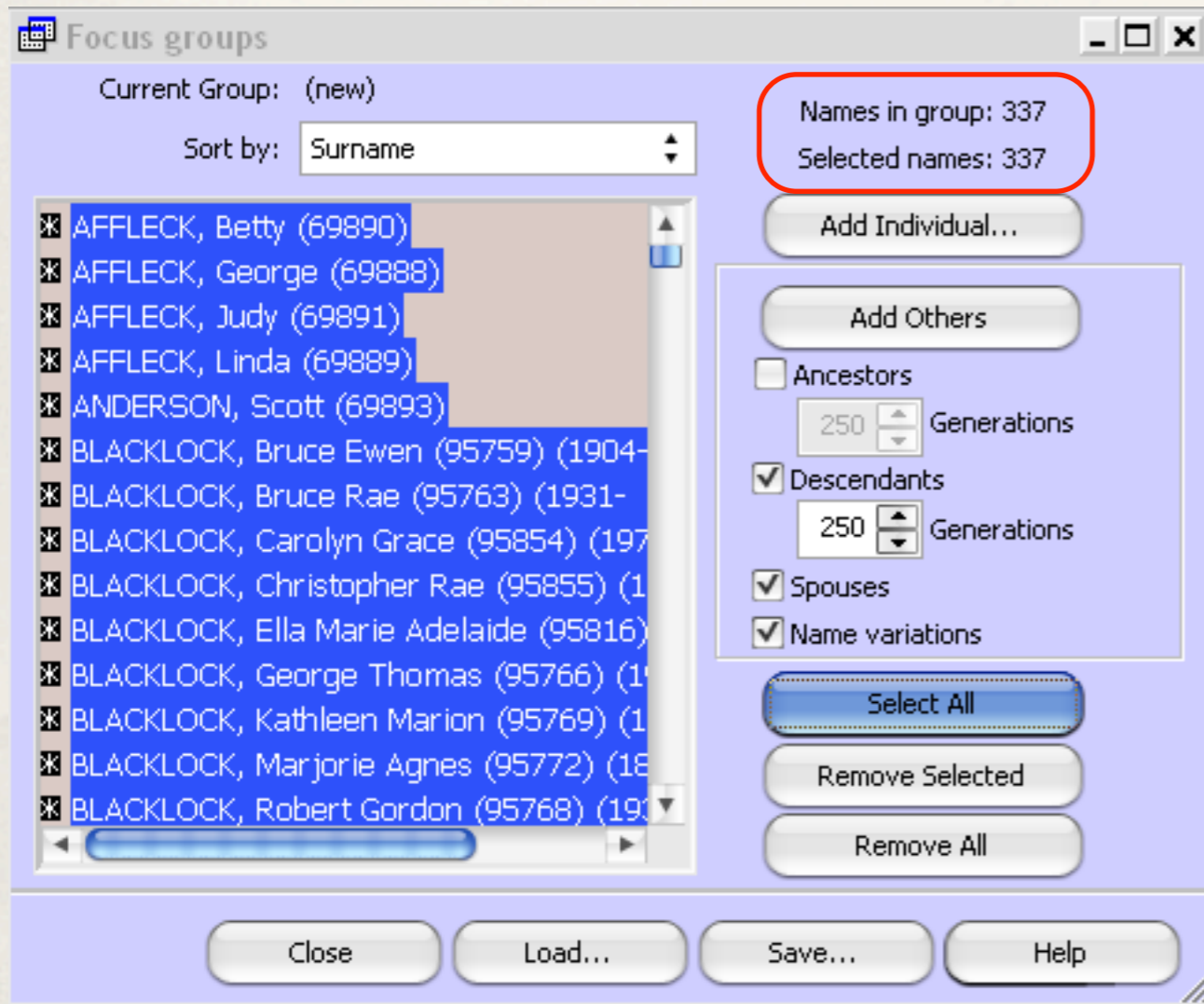
The screenshot shows a 'Details' window with three tabs: 'Person', 'Family', and 'Tree'. The 'Person' tab is active. Below the tabs is a table with two columns: 'Type' and 'Name'. The table contains three rows: 'Name' with the value 'Arthur Preston WALKER (114) (1890-1963)', 'Father' with a blank space, and 'Mother' with the value 'Mary Adelaide CLARK (1123) (1861-1932)'. The 'Name' and 'Mother' rows are highlighted in cyan.

Type	Name
Name	Arthur Preston WALKER (114) (1890-1963)
Father	
Mother	Mary Adelaide CLARK (1123) (1861-1932)

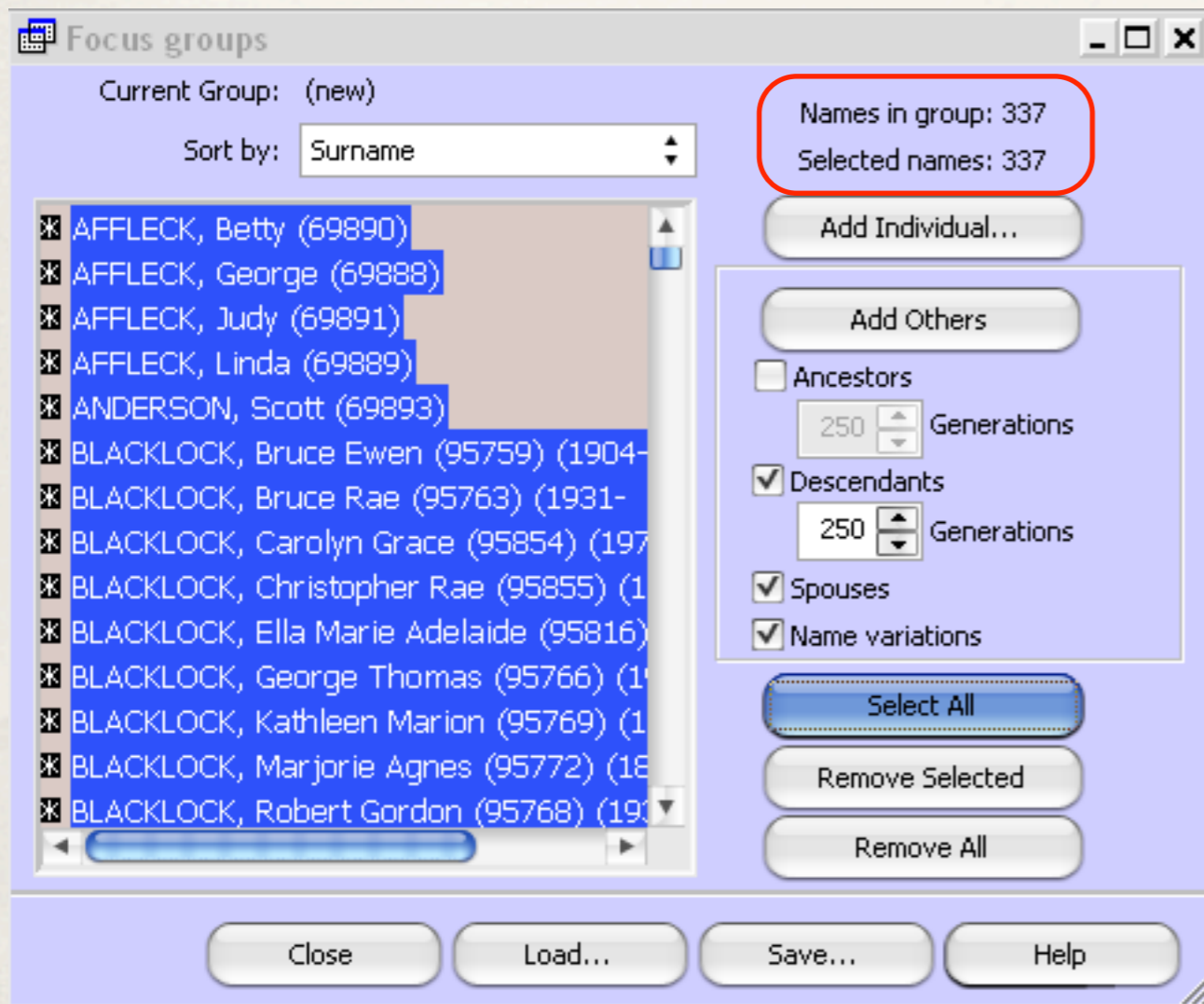
Using just the first iteration, we find there are several instances where there is a missing parent. In this case, the father of Arthur Preston Walker is not in the direct line from Tristram Coffyn.

Another iteration is required to add more spouses.

Focus Group

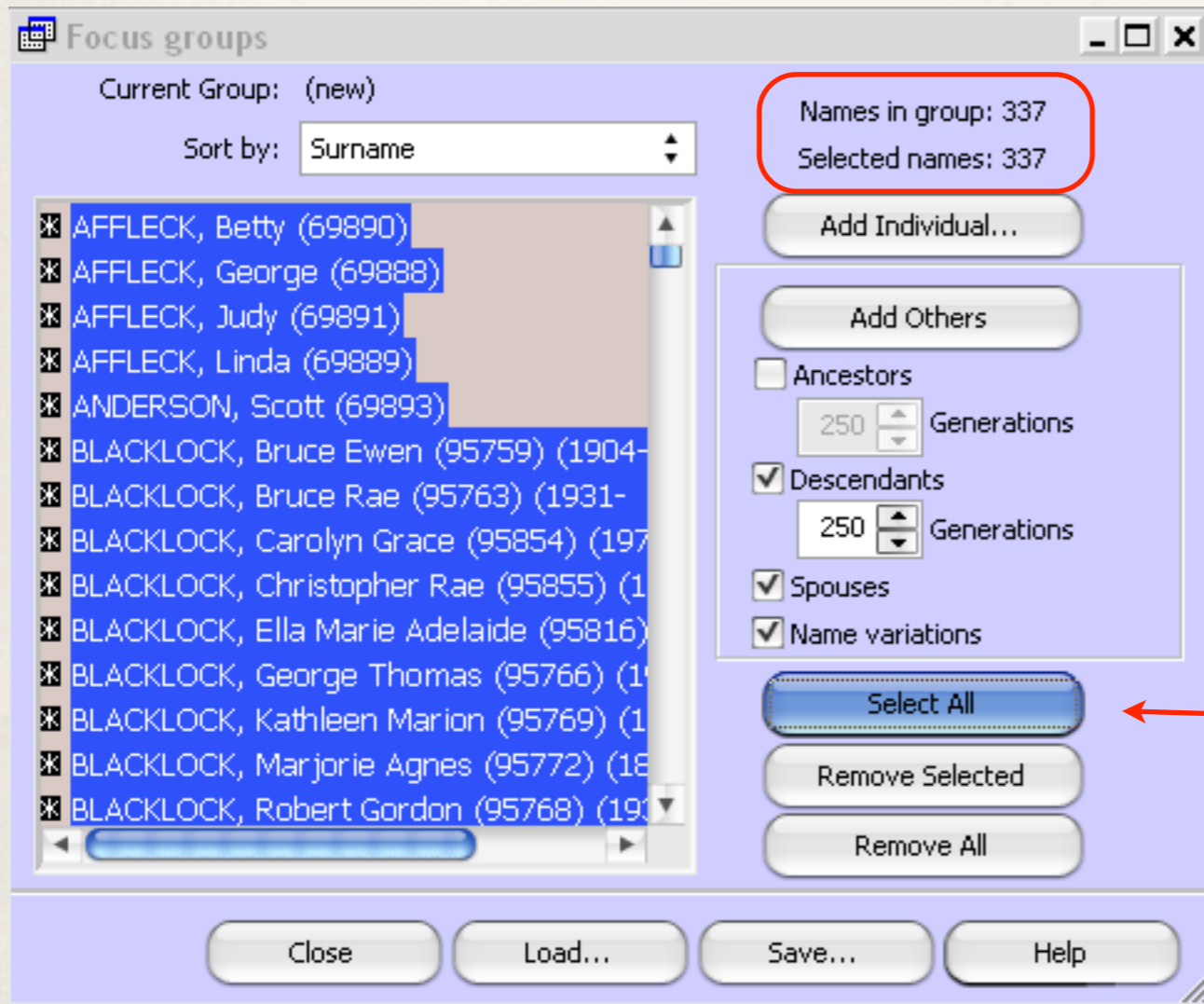


Focus Group



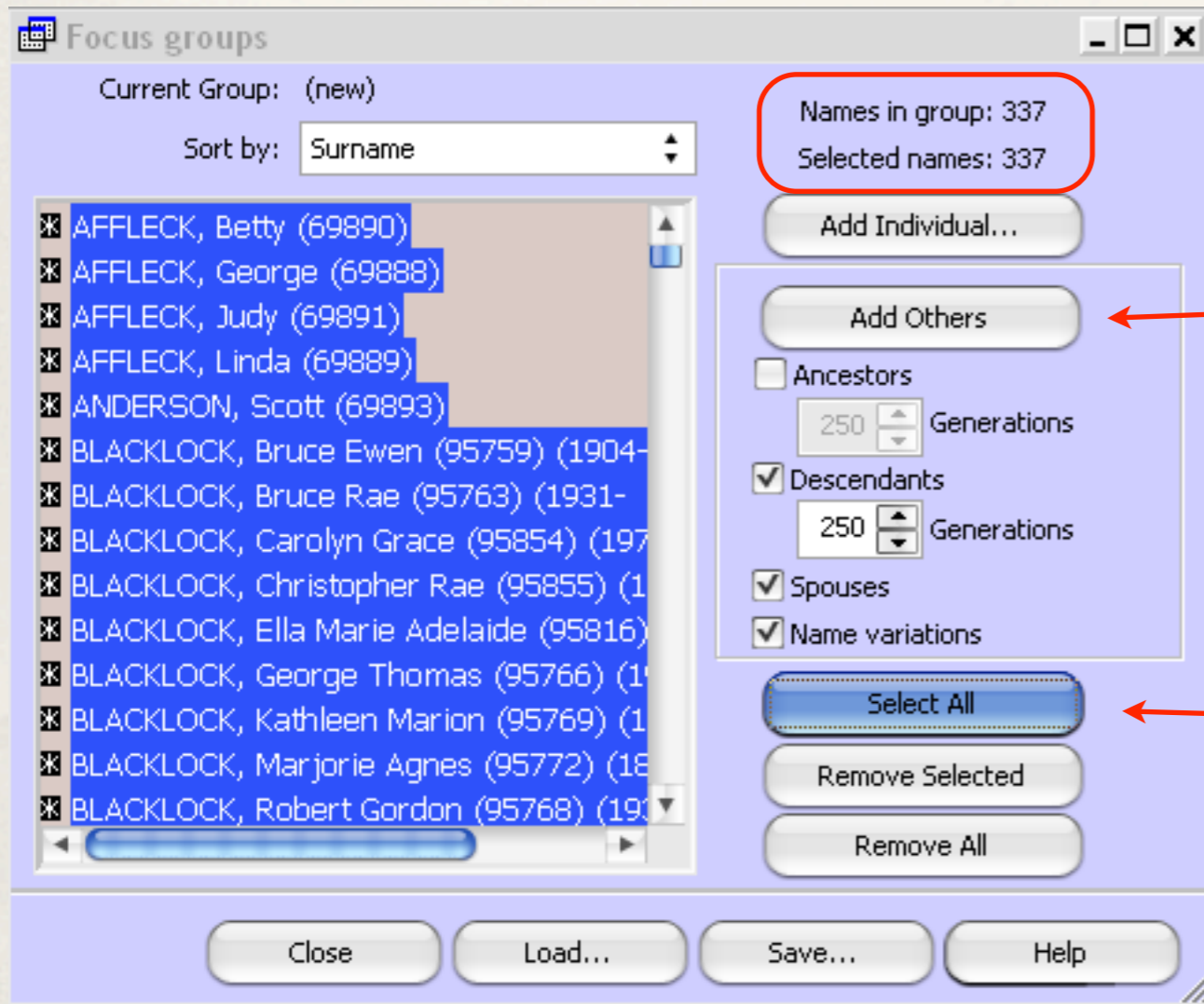
1. Click 'Select All'

Focus Group



1. Click 'Select All'

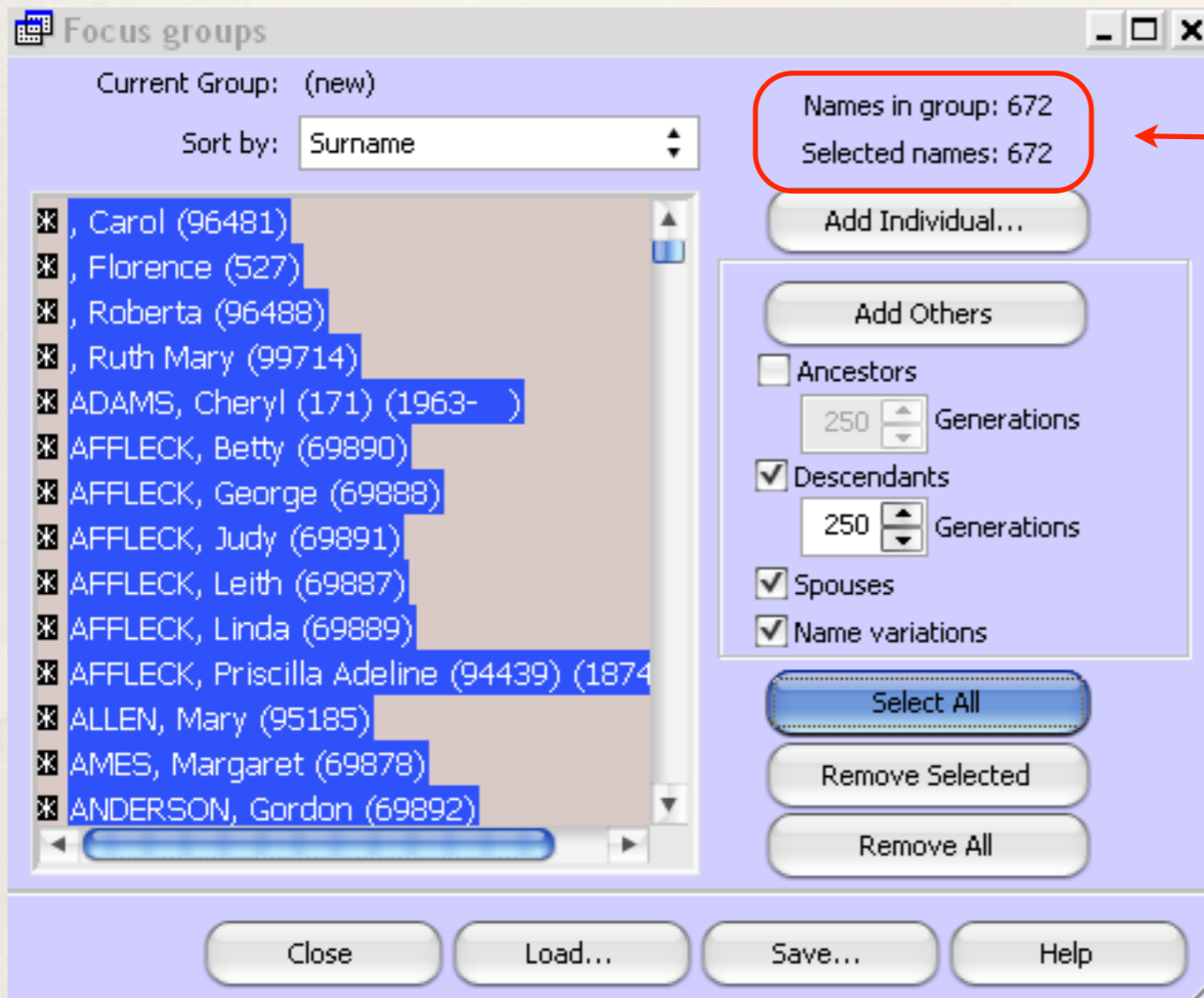
Focus Group



2. Click 'Add Others'

1. Click 'Select All'

Focus Group



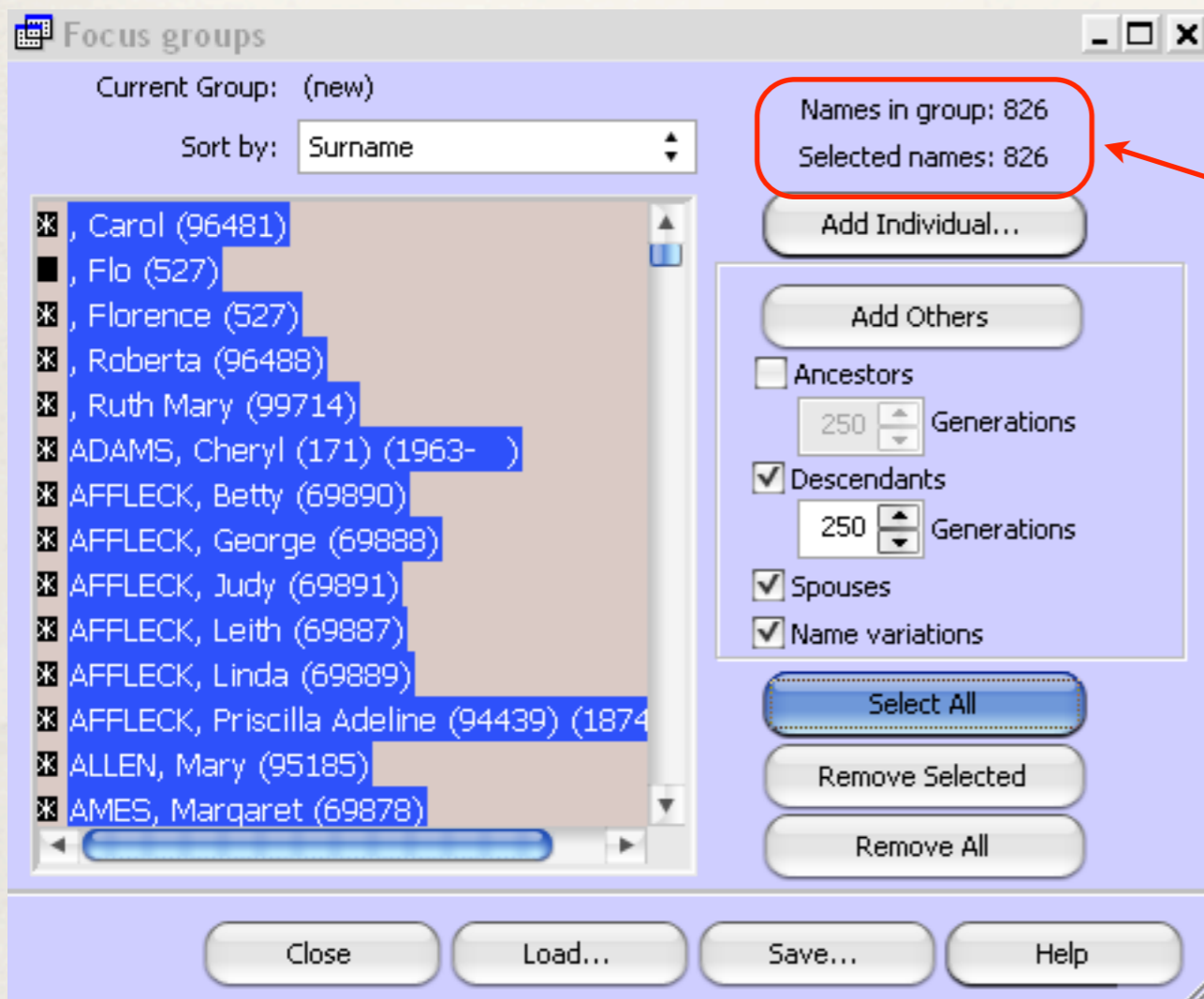
The second iteration has increased the number of names from 337 to 672.

Result From Second Iteration

Details		
Person	Family	Tree
Type	Name	
Name	Arthur Preston WALKER (114) (1890-1963)	
Father	George Price WALKER (153) (1857-1938)	
Mother	Mary Adelaide CLARK (1123) (1861-1932)	

The second iteration was successful in adding the father for Arthur Preston Walker.

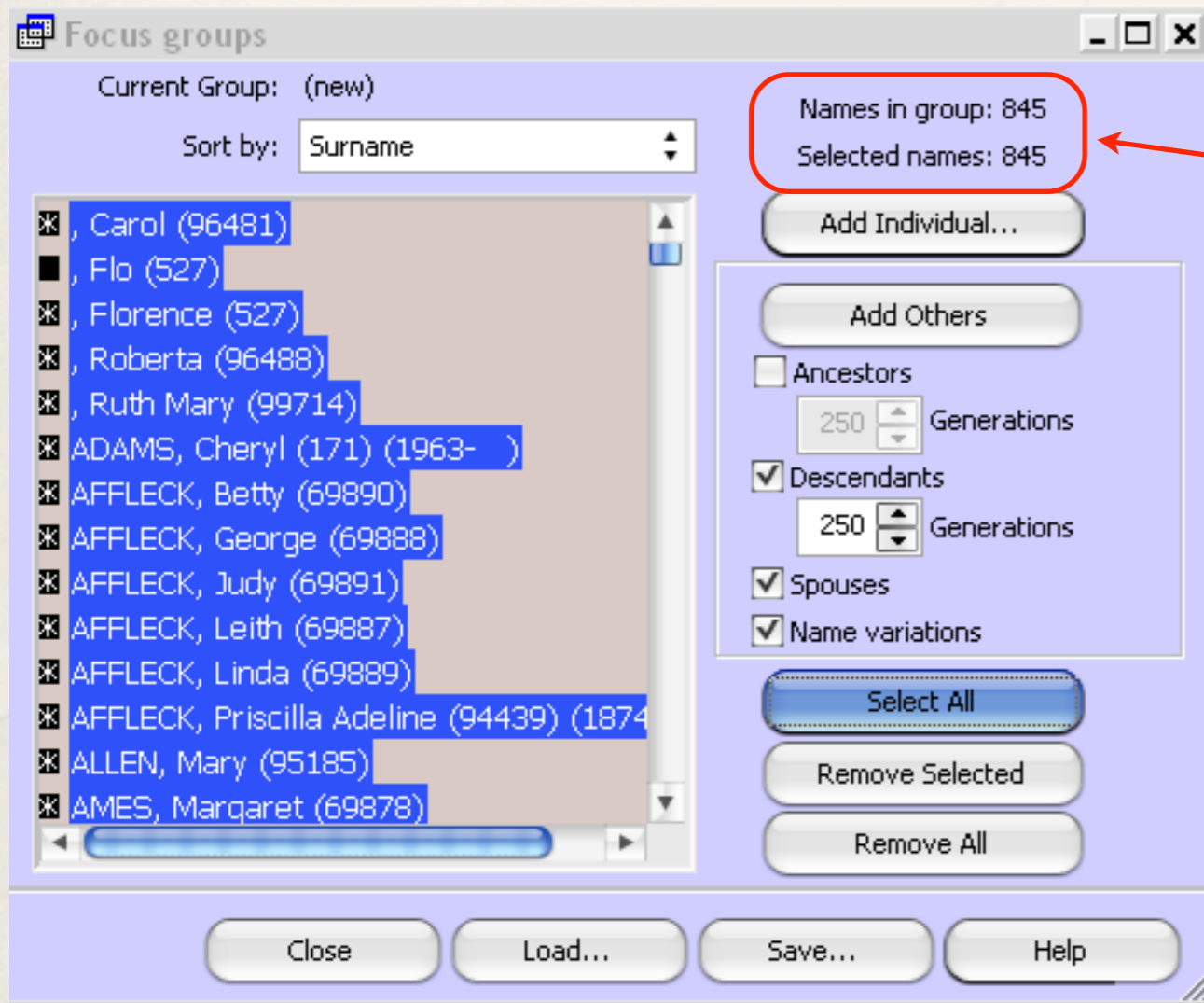
Focus Group



Repeat the process until there is no increase in the number of names.

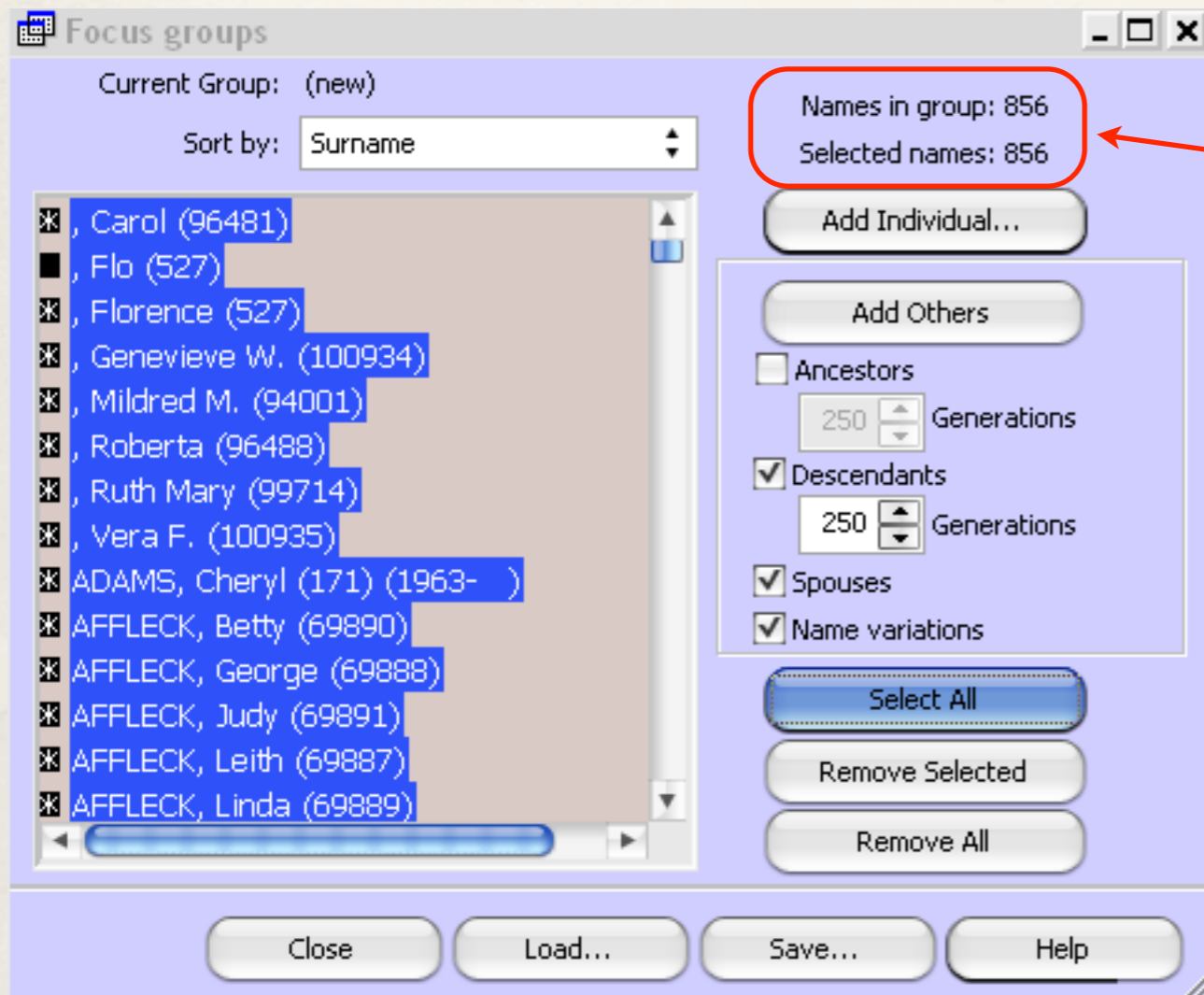
A third iteration has increased the number of names from 672 to 826.

Focus Group



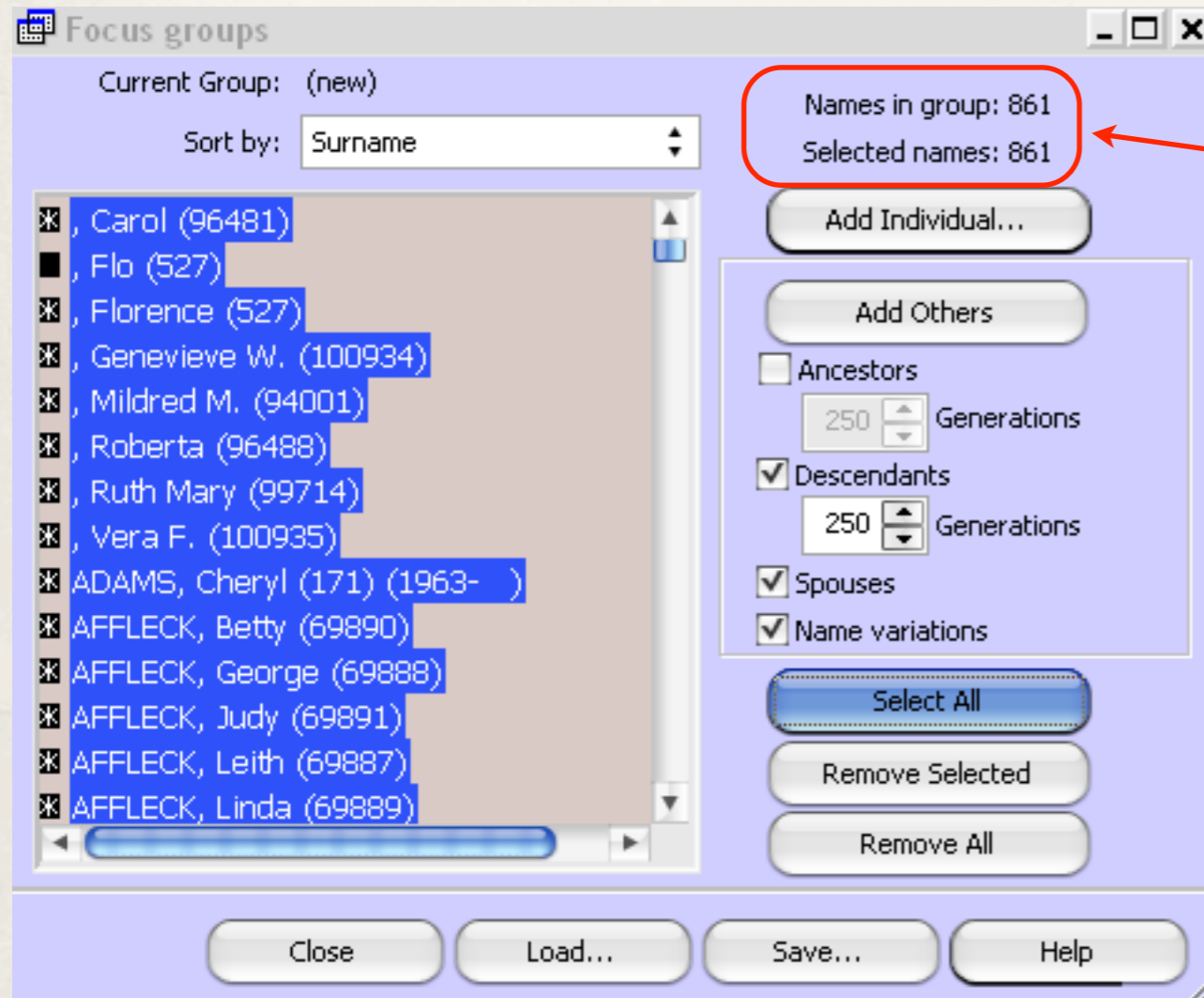
A fourth iteration has increased the number of names from 826 to 845.

Focus Group



A fifth iteration has increased the number of names from 845 to 856.

Focus Group



This sixth and final iteration has resulted in a maximum of 861 names.

Report Definition Screen

From the TMG Report drop down menu, select List of People.


Report Definition Screen

Report Definition Screen - List of People

Configuration name: List of People

Add Delete Reset Defaults

Subject(s) of the report : Use the Current Focus Person

One person
94574  Tristram COFFYN (94574) b. 1605, d. 03 Oct 1681

Filtered group

Add Edit Delete

Focus Group Current group

Selected people on the Project Explorer

All people in the project

Report Destination : Properties Watermark

Screen Preview

Save to :
File type : Adobe Reader (PDF)
File name : *.PDF

Printer

1 Copies

Page number for first page : 1

Print page range : 1 - 32767

Options... Create Report Save Settings Cancel Help

Report Definition Screen

1. Select Focus Group, Current group

The screenshot shows a software dialog box titled "Report Definition Screen - List of People". The interface is light blue and contains several sections for configuring a report.

- Configuration name:** A dropdown menu set to "List of People". Below it are "Add", "Delete", and "Reset Defaults" buttons.
- Subject(s) of the report:** A section with a checkbox "Use the Current Focus Person" (unchecked). Below are radio buttons for "One person", "Filtered group", "Focus Group" (selected), "Selected people on the Project Explorer", and "All people in the project". The "One person" option has a text input "94574" and a preview "Tristram COFFYN (94574) b. 1605, d. 03 Oct 1681". The "Filtered group" option has a dropdown menu. The "Focus Group" option has a dropdown menu set to "Current group". Below these are "Add", "Edit", and "Delete" buttons.
- Report Destination:** Radio buttons for "Screen Preview" (selected), "Save to:", and "Printer". The "Save to:" option has a "File type:" dropdown set to "Adobe Reader (PDF)" and a "File name:" input set to "*.PDF" with a browse button "...". To the right are "Properties" and "Watermark" buttons.
- Page Settings:** A "Copies" spinner set to "1" and a "Page number for first page:" spinner set to "1". Below these is a "Print page range:" spinner set to "1 - 32767".
- Bottom Buttons:** "Options...", "Create Report", "Save Settings", "Cancel", and "Help".

Report Definition Screen

1. Select Focus Group, Current group

Report Definition Screen - List of People

Configuration name: List of People

Buttons: Add, Delete, Reset Defaults

Subject(s) of the report : Use the Current Focus Person

One person
94574 Tristram COFFYN (94574) b. 1605, d. 03 Oct 1681

Filtered group

Buttons: Add, Edit, Delete

Focus Group

Selected people on the Project Explorer

All people in the project

Report Destination :

Screen Preview

Save to :

File type : Adobe Reader (PDF)

File name : *.PDF

Printer

1 Copies

Page number for first page : 1

Print page range : 1 - 32767

Buttons: Options..., Create Report, Save Settings, Cancel, Help

Report Definition Screen

1. Select Focus Group, Current group

2. Click Options

Report Definition Screen - List of People

Configuration name: List of People

Add Delete Reset Defaults

Subject(s) of the report : Use the Current Focus Person

One person
94574 Tristram COFFYN (94574) b. 1605, d. 03 Oct 1681

Filtered group

Add Edit Delete

Focus Group Current group

Selected people on the Project Explorer

All people in the project

Report Destination : Properties Watermark

Screen Preview

Save to :
File type : Adobe Reader (PDF)
File name : *.PDF

Printer

1 Copies

Page number for first page : 1

Print page range : 1 - 32767

Options... Create Report Save Settings Cancel Help

Report Options

The screenshot shows the 'Report Options' dialog box with the 'Secondary Output' tab selected. The dialog has a title bar with a minimize, maximize, and close button. Below the title bar are seven tabs: 'General', 'Page Options', 'Fonts', 'Output Columns', 'Secondary Output', 'Places', and 'Miscellaneous'. The 'Secondary Output' tab is active, showing several options:

- Create New Project: A text field contains the path '\\psf\Home\Documents\The Master Genealogist v8\Projects\' followed by a browse button (...).
- Create New Dataset: A text field contains 'User Defined Name'.
- Lock Timelines: A dropdown menu.
- Unlock Timelines: A dropdown menu.
- Change Flag: Two dropdown menus, the first containing 'SEX' and the second containing '?'.
- Suppress output to screen, file, and printer.

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

Report Options

1. Select Secondary Output

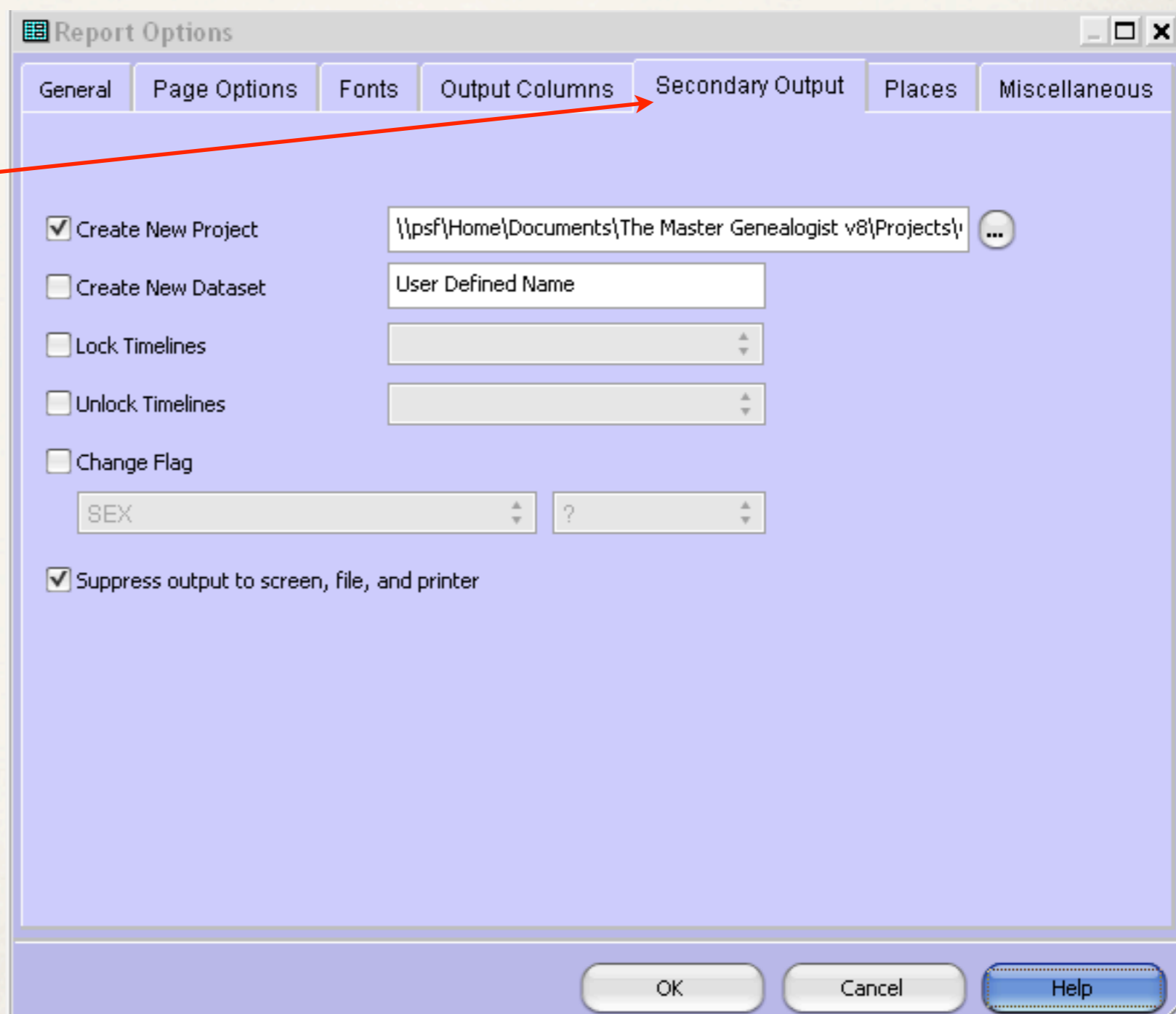
The screenshot shows the 'Report Options' dialog box with the 'Secondary Output' tab selected. The dialog has a title bar with a minimize, maximize, and close button. The tabs are: General, Page Options, Fonts, Output Columns, Secondary Output (selected), Places, and Miscellaneous. The 'Secondary Output' tab contains the following options:

- Create New Project: The path is set to '\\psf\Home\Documents\The Master Genealogist v8\Projects\'. There is a browse button (three dots) to the right.
- Create New Dataset: The text 'User Defined Name' is entered in the adjacent text box.
- Lock Timelines: An empty dropdown menu.
- Unlock Timelines: An empty dropdown menu.
- Change Flag: Two dropdown menus, the first containing 'SEX' and the second containing '?'.
- Suppress output to screen, file, and printer.

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

Report Options

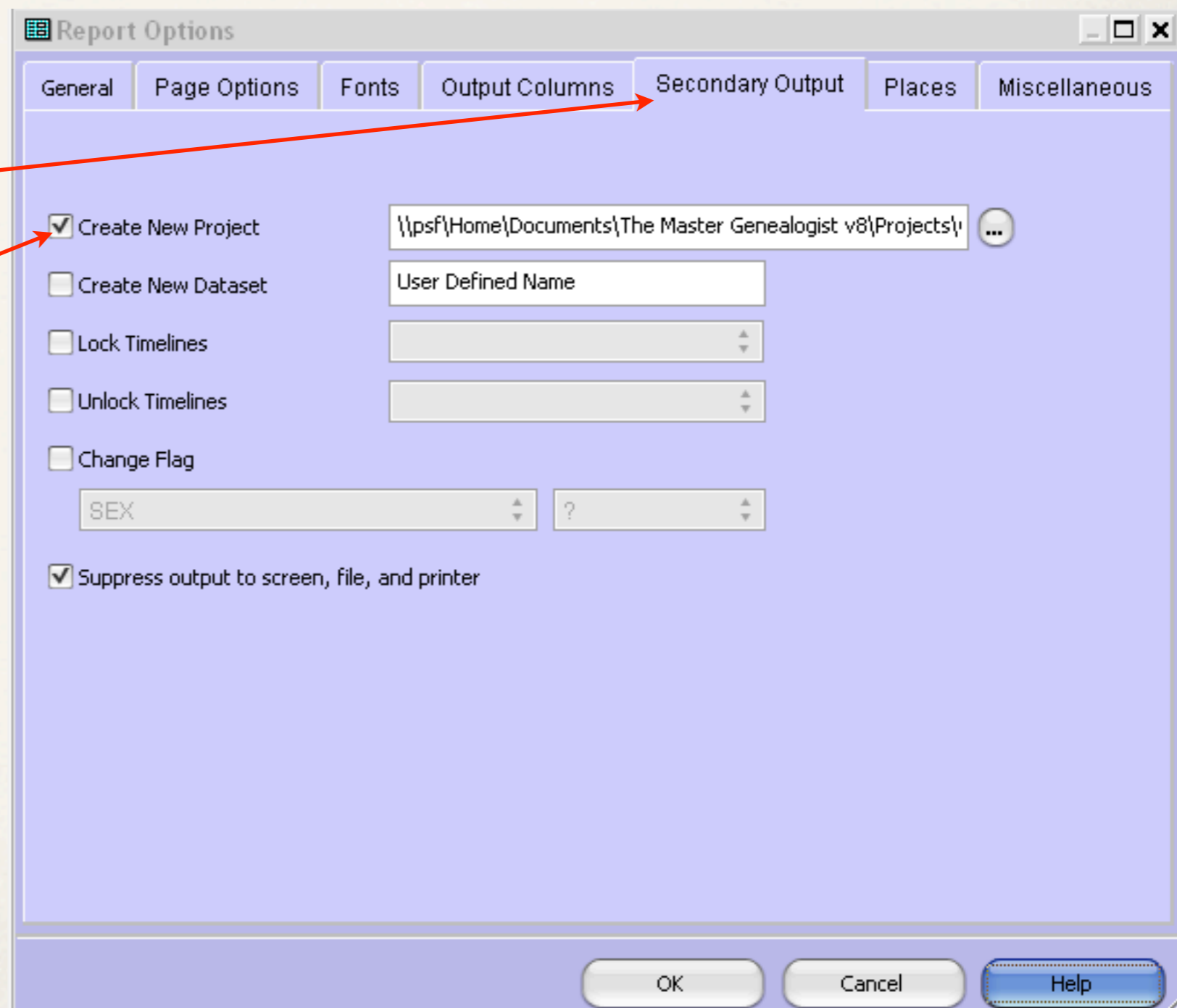
1. Select Secondary Output



Report Options

1. Select Secondary Output

2. Check Create New Project

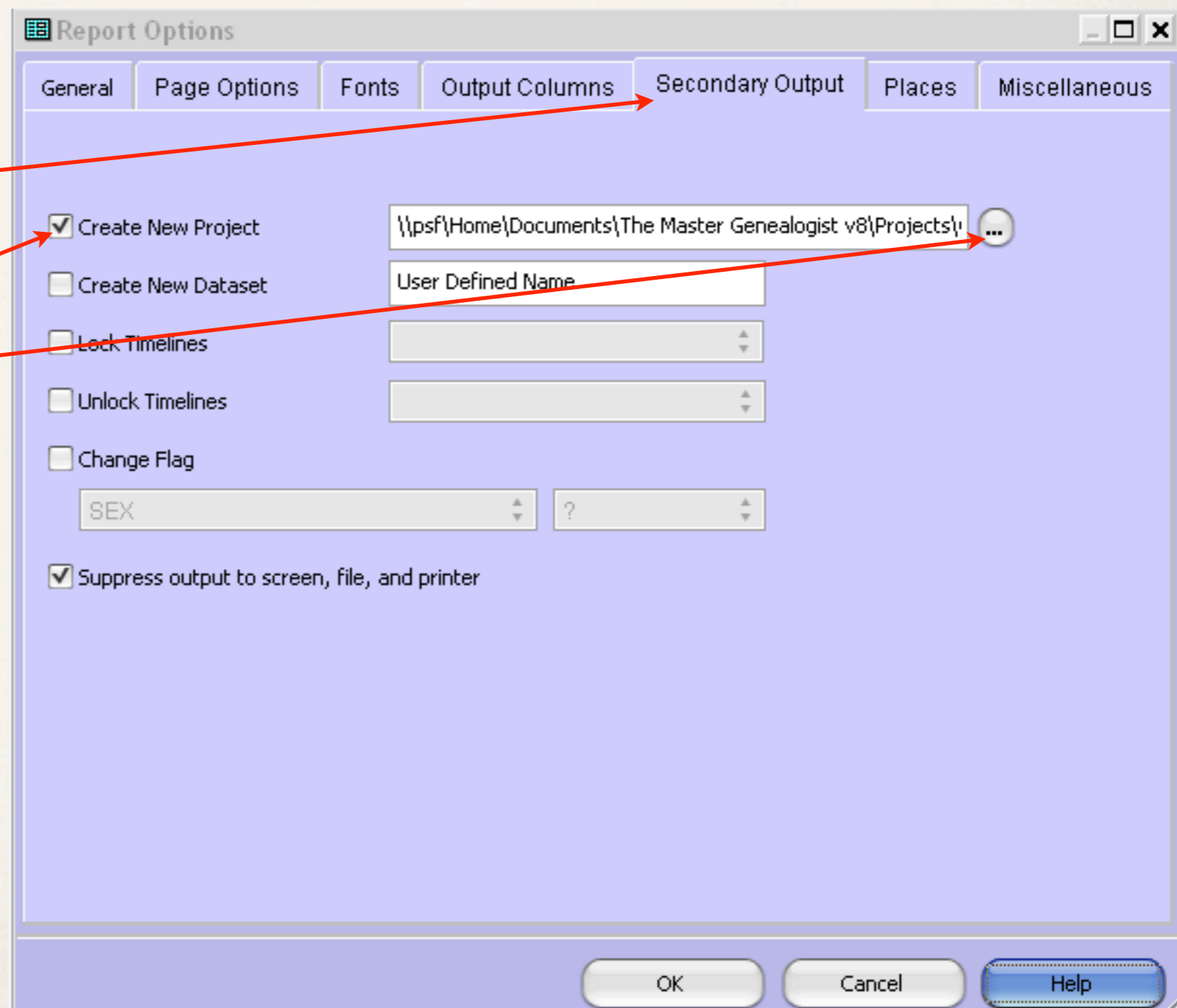


Report Options

1. Select Secondary Output

2. Check Create New Project

3. Click here to define project and path



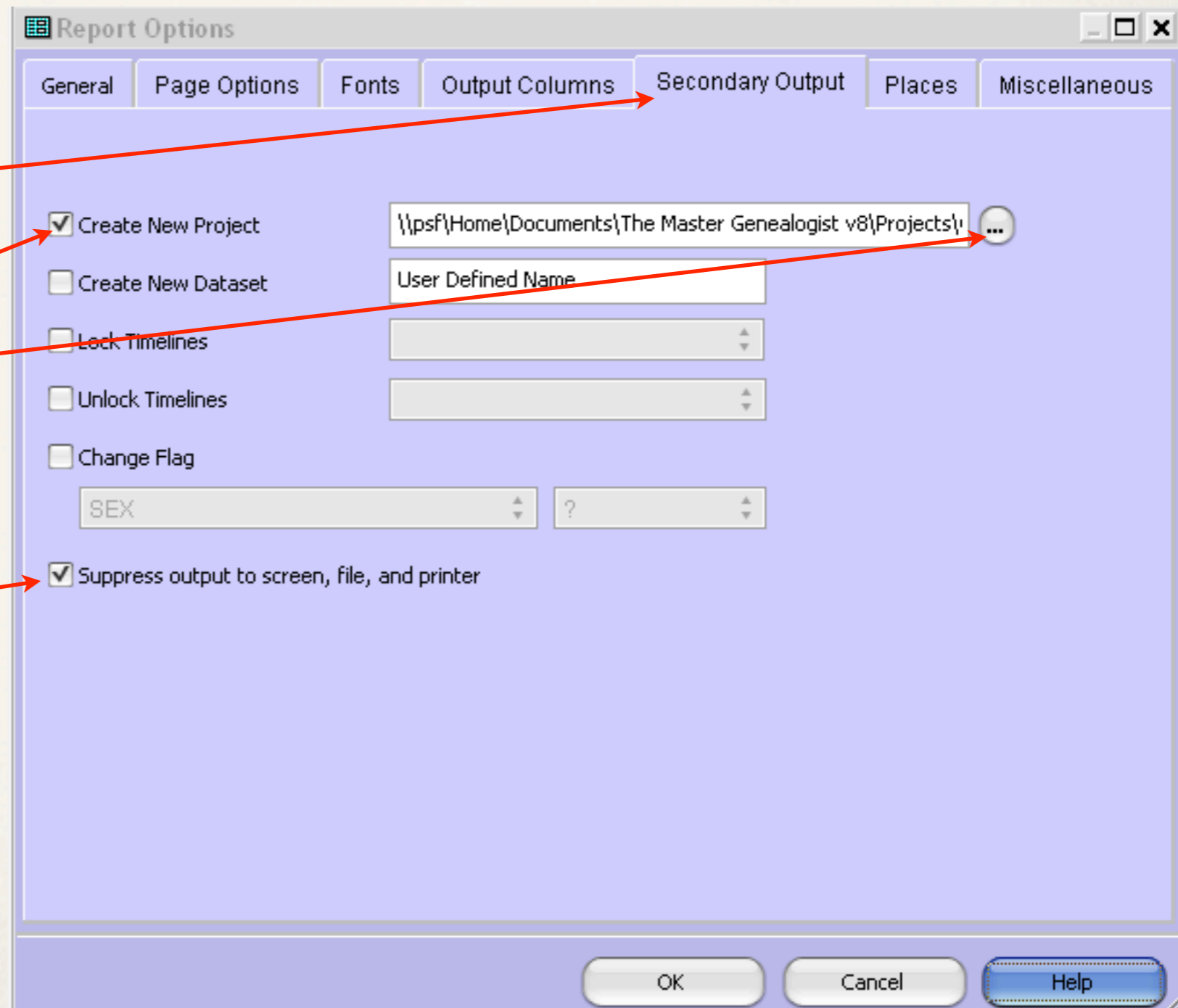
Report Options

1. Select Secondary Output

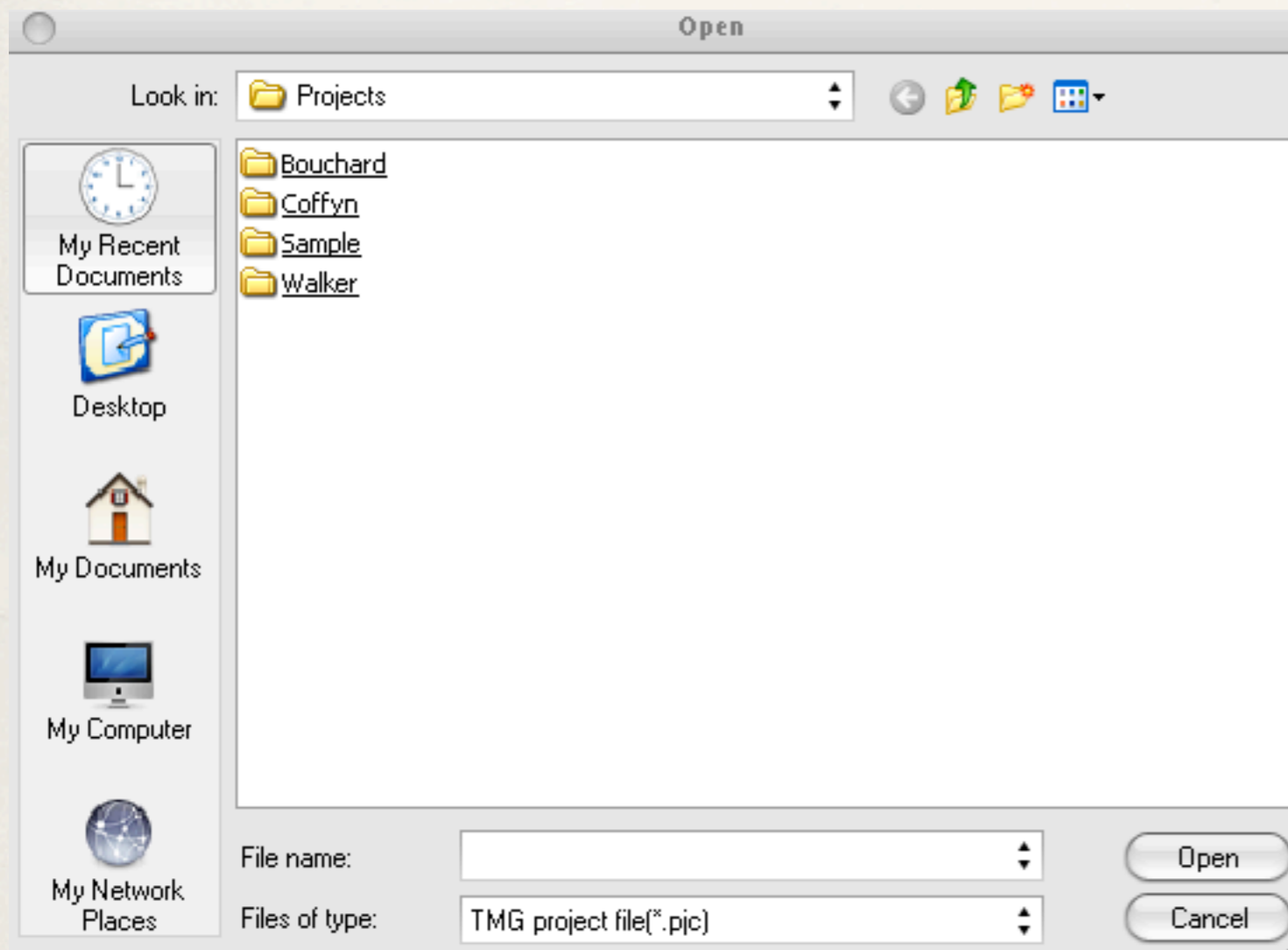
2. Check Create New Project

3. Click here to define project and path

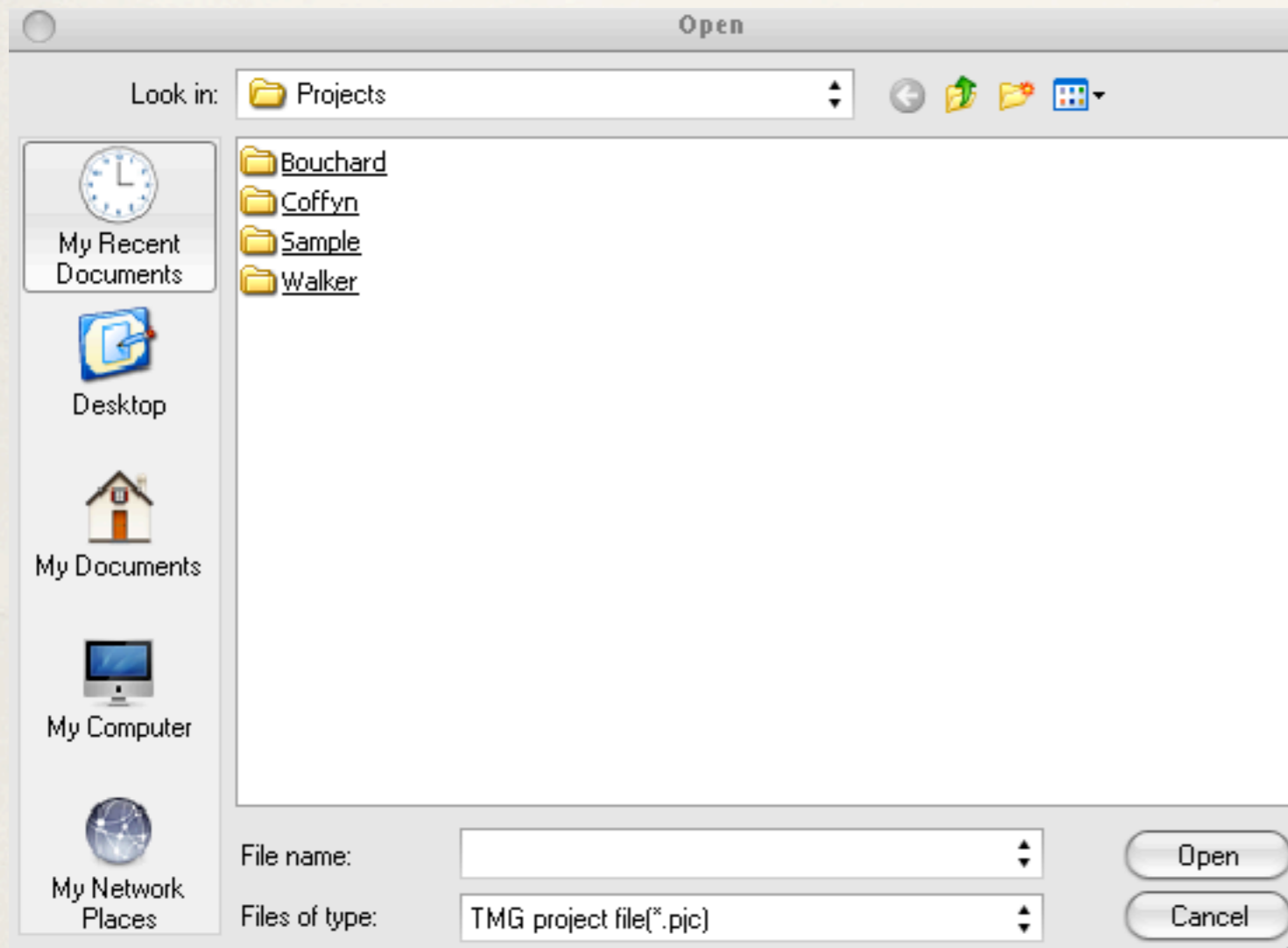
4. Check Suppress output to screen, file, and printer



Project Path

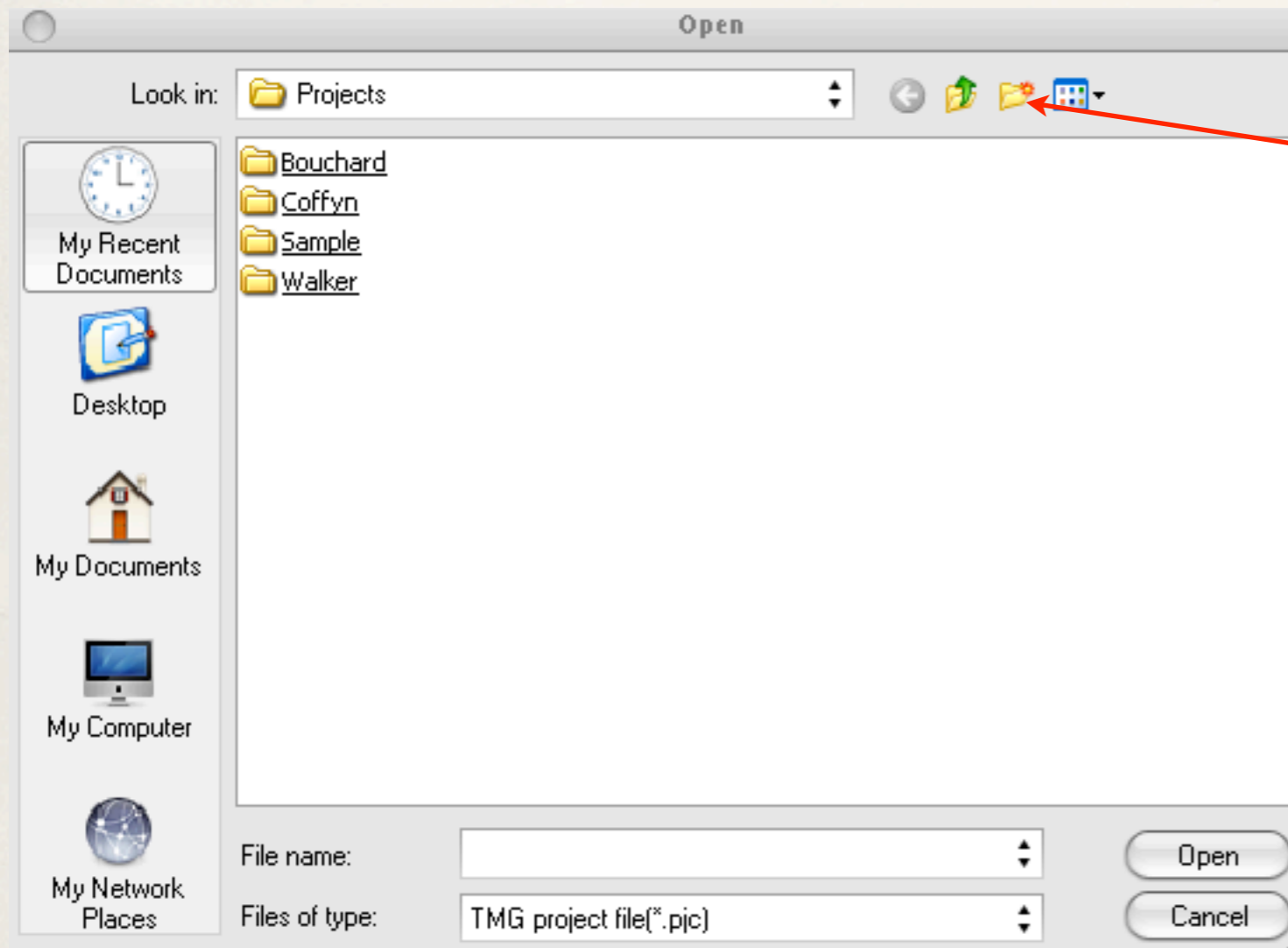


Project Path



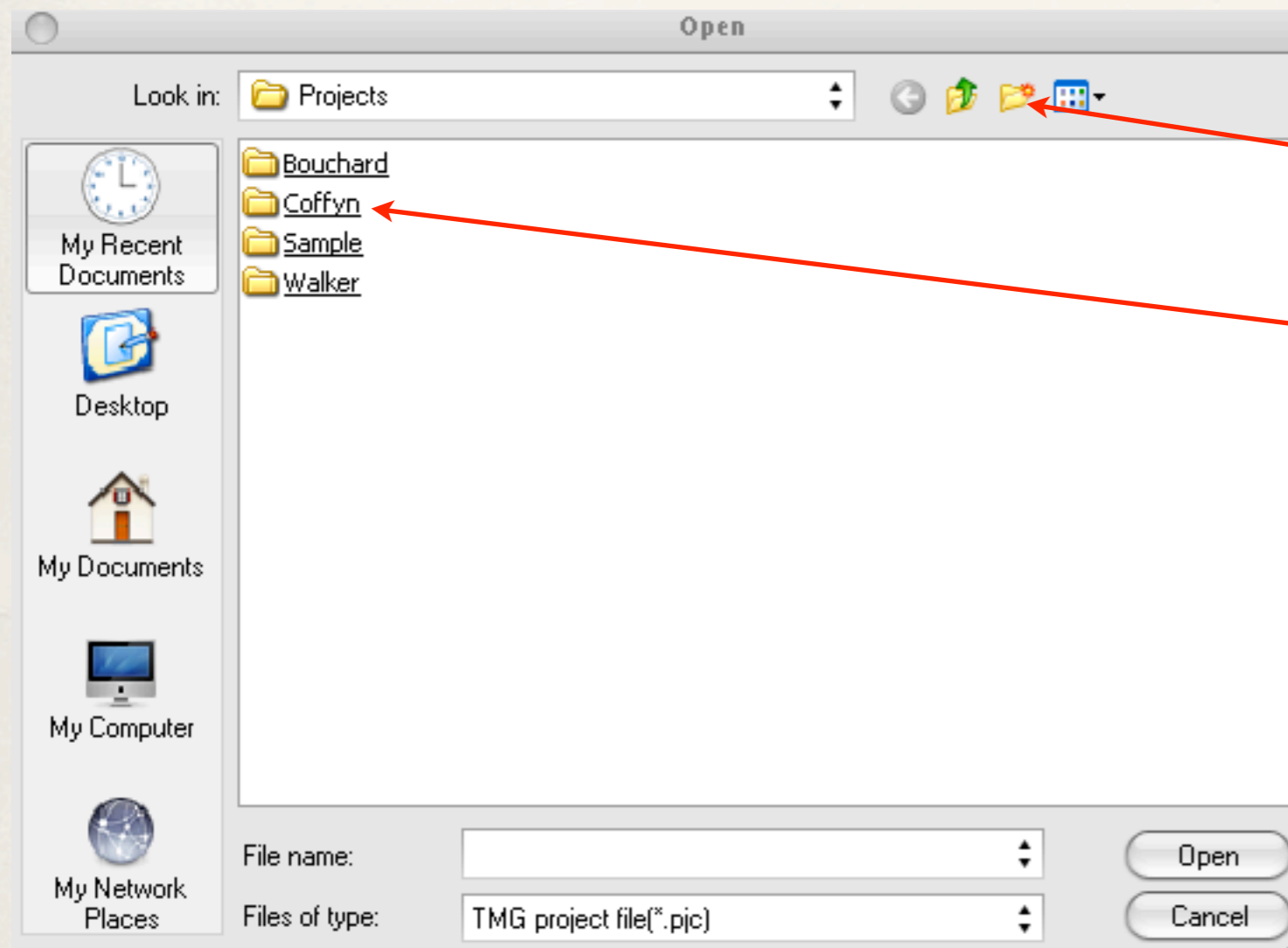
1. Click here to create a new project folder

Project Path



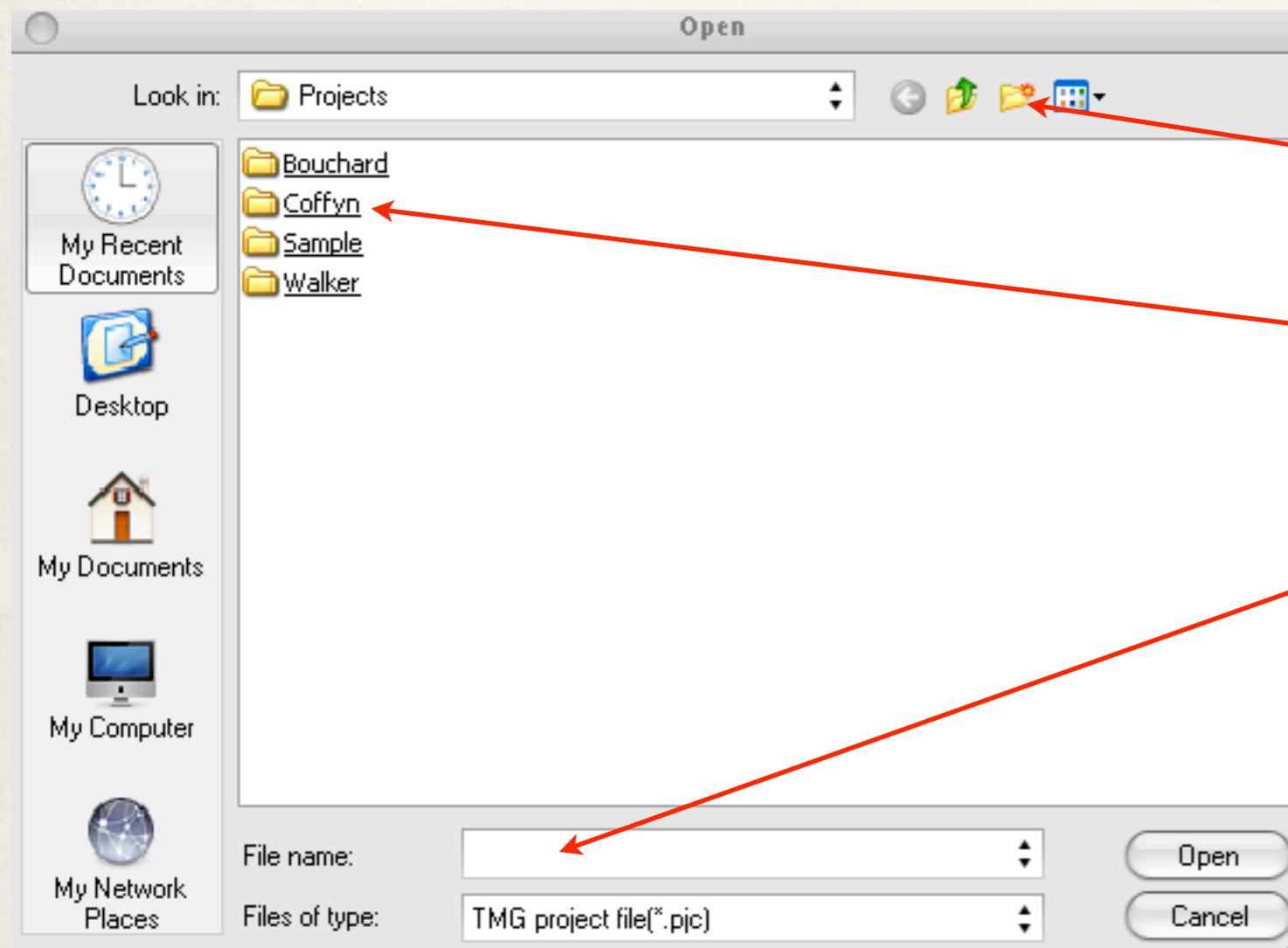
1. Click here to create a new project folder

Project Path



1. Click here to create a new project folder
2. Open the new project folder

Project Path



1. Click here to create a new project folder

2. Open the new project folder

3. Type a name for the new project here

New Project

Click OK to confirm the name and path for the new project.

Confirm New Project

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

Please confirm the name of the new project.

\\psf\Home\Documents\The Master Genealogist v8\Projects\Coffyn\Desc. of Tristram Co

OK Cancel Help

Add Edit Delete

Focus Group Current group

Selected people on the Project Explorer

All people in the project

Report Destination : Output suppressed as specified under Options >
Secondary output

Screen Preview Watermark

Save to :
File type : Adobe Reader (PDF)

File name : *.*PDF

Printer

1 Copies

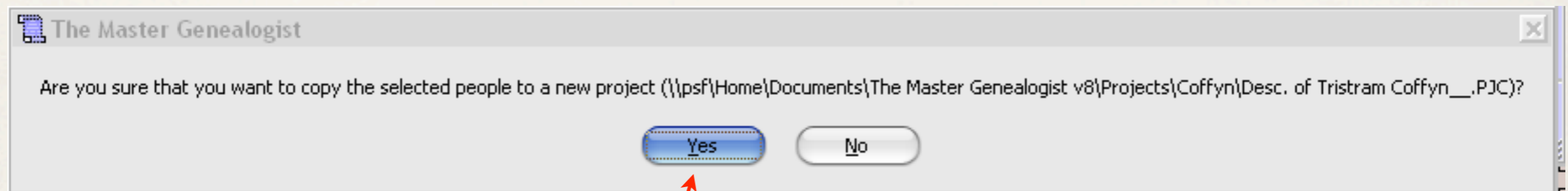
Page number for first page : 1

Print page range : 1 - 32767

Options... Create Report Save Settings Cancel Help

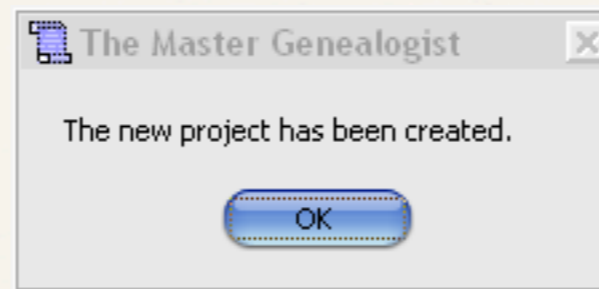
New Project

This window gives you a second option to accept or reject the path of the new project.



Click Yes to accept.

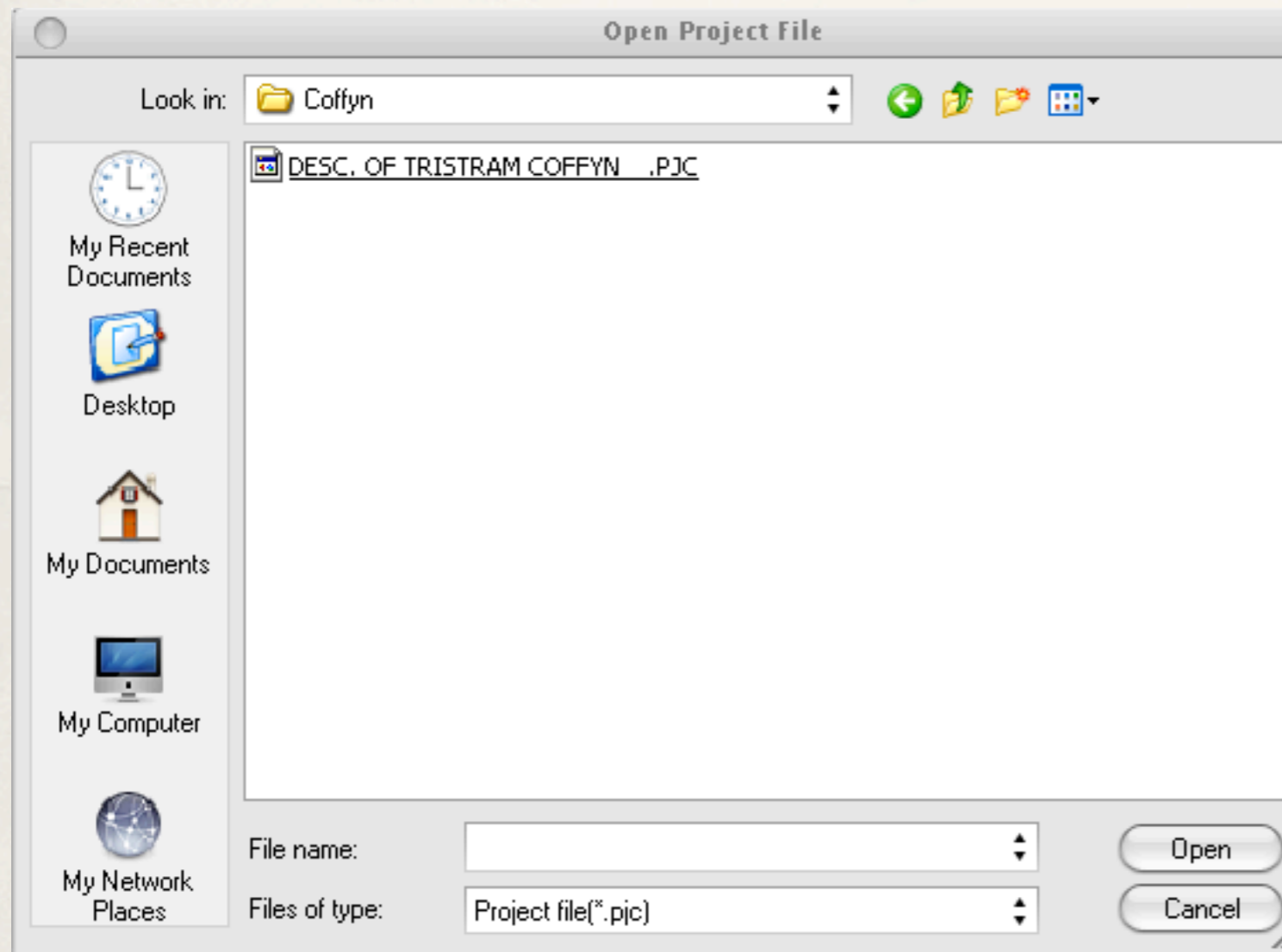
New Project



This window appears to advise you that the new project has been created.

New Project

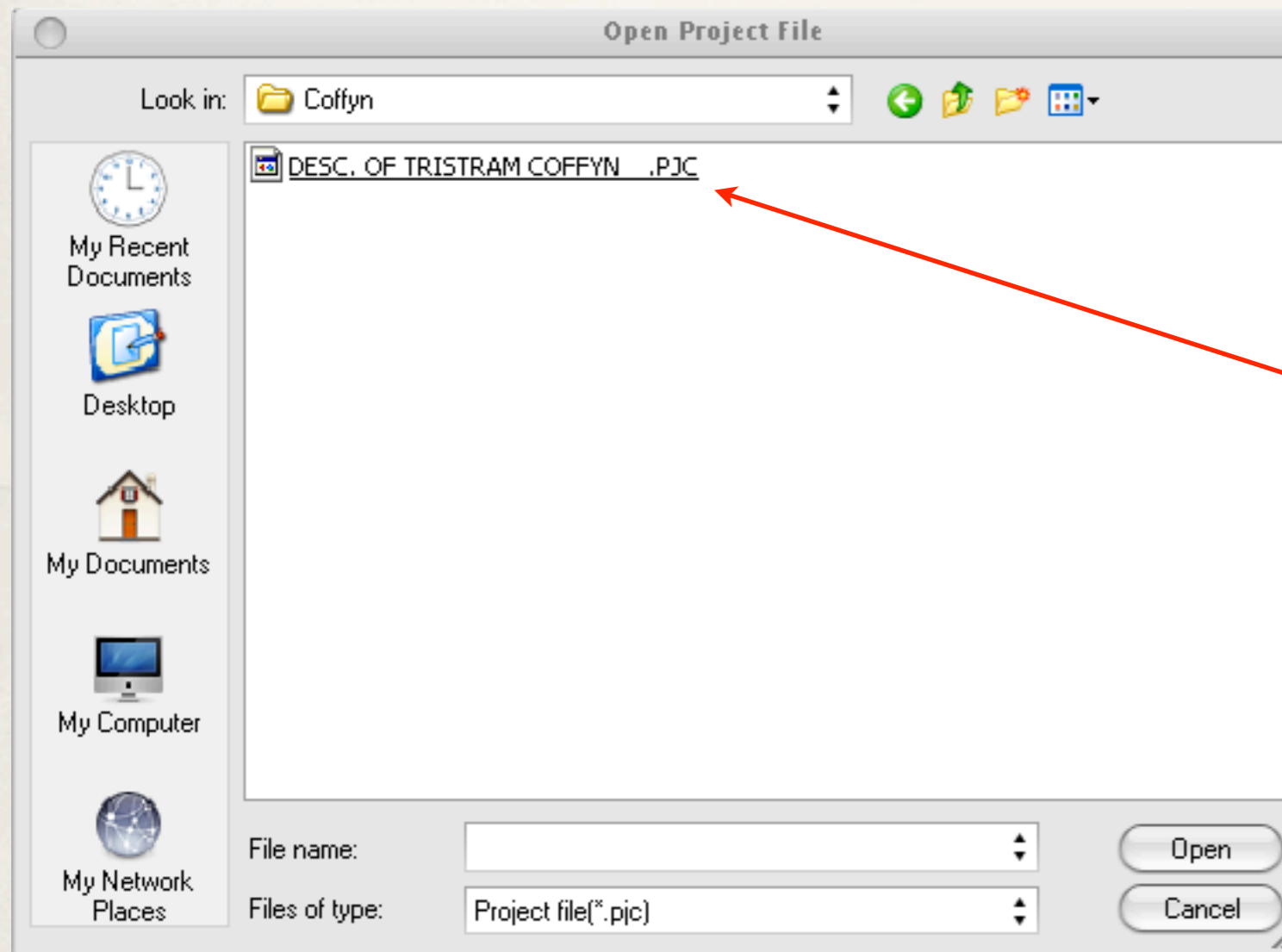
From the TMG File drop down menu, select Open File



Open the folder containing the new project.

New Project

From the TMG File drop down menu, select Open File

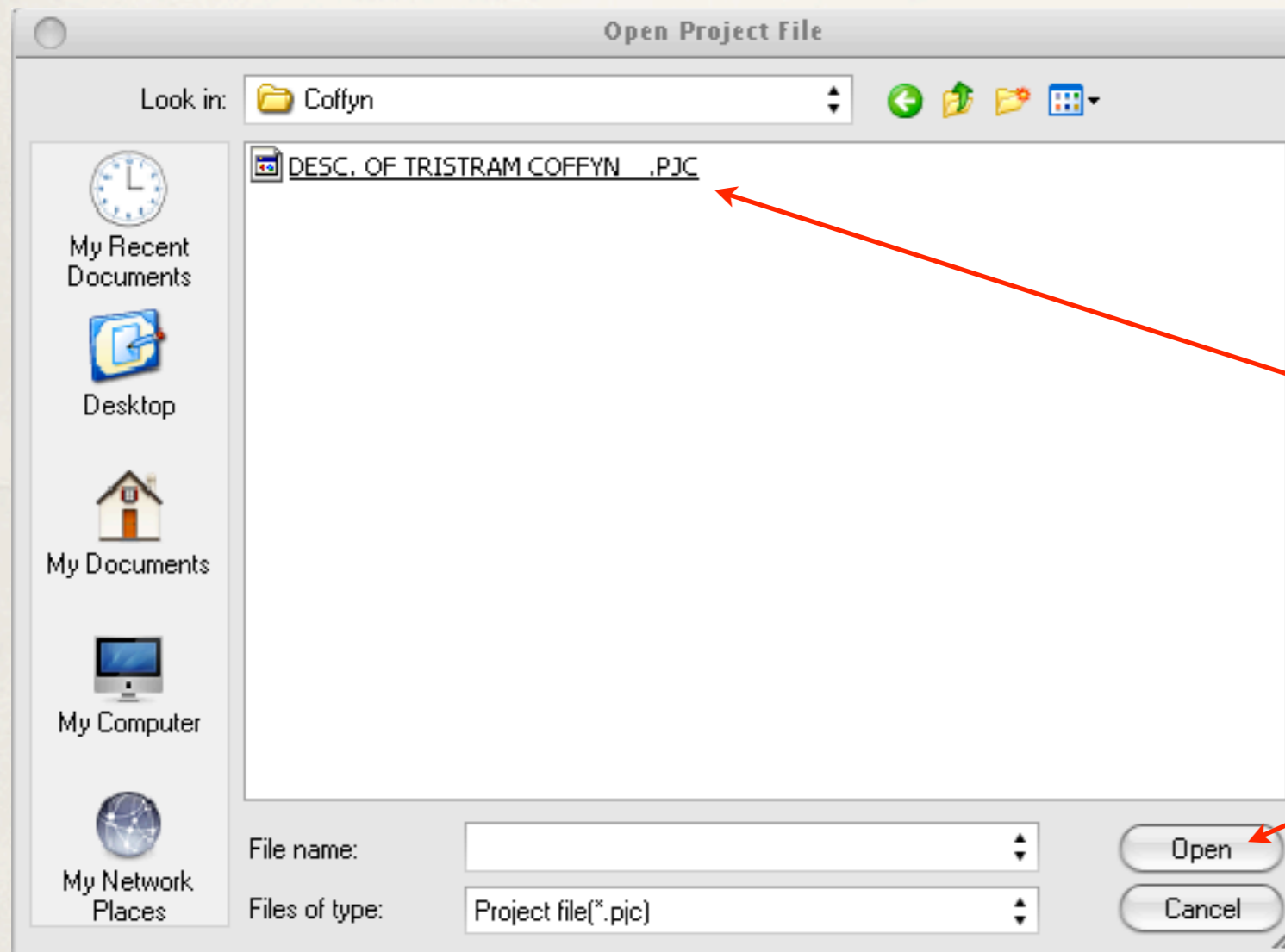


Open the folder containing the new project.

1. Highlight the new project pjc file.

New Project

From the TMG File drop down menu, select Open File



Open the folder containing the new project.

1. Highlight the new project pjc file.

2. Click Open.

New Project

Person detail window of the chosen progenitor in the new project

Details

Person Family Tree

Type	Name	Type	Value
Name	Tristram COFFYN (94574) (1605-1681)	Reference	
Father		Children	9
Mother		Soundex	C150

Type	Date	Name/Place	Age	M	S	E	T
Name-Var		Tristram COFFIN			✓		
* Birth	1605	Brixton Parish, Plymouth, Devonshire, England	~0		✓		
Baptism	11 Mar 1610		~5		✓		
* Marriage	1630	Dionis STEVENS (94575); (probably) Devonshire, England	~25		✓		
* Son-Bio	1631	Peter COFFIN (95033); Brixton, Devonshire, England	~26		✓		
* Son-Bio	1632	Tristram COFFIN Jr. (95037); probably, Brixton, England	~27		✓		
* Dau-Bio	1635	Elizabeth COFFIN (95042); England	~30		✓		
* Son-Bio	12 Aug 1640	Hon. James COFFIN (94572); Brixton, Devonshire, England	~35		✓		
* Son-Bio		John COFFIN (95044); England			✓		
* Immigratr	1642	Newbury, Massachusetts, accompanying Tristram were his wife, five small children, his widowed	~37	✓	✓		
* Dau-Bio	16 Nov 1642	Deborah COFFIN (95045); Haverhill, Massachusetts	~37		✓		
* Dau-Bio	20 Feb 1645	Mary COFFIN (95046); Haverhill, Massachusetts	~40		✓		
* Son-Bio	20 Oct 1647	Lieutenant John COFFIN (95048); Haverhill, Massachusetts	~42		✓		
* Son-Bio	10 May 1652	Stephen COFFIN (95052); Newbury, Massachusetts	~47		✓		
* Settled	1660	Nantucket, Massachusetts, ; he was successively of Haverhill, Newbury, Salisbury and Nantucket.	~55	✓	✓		
* Death	03 Oct 1681	Nantucket, Massachusetts	~76		✓		

Add
Edit
Delete
Primary

Project Summary of Original Project

The original (main) project contains 93,275 people.



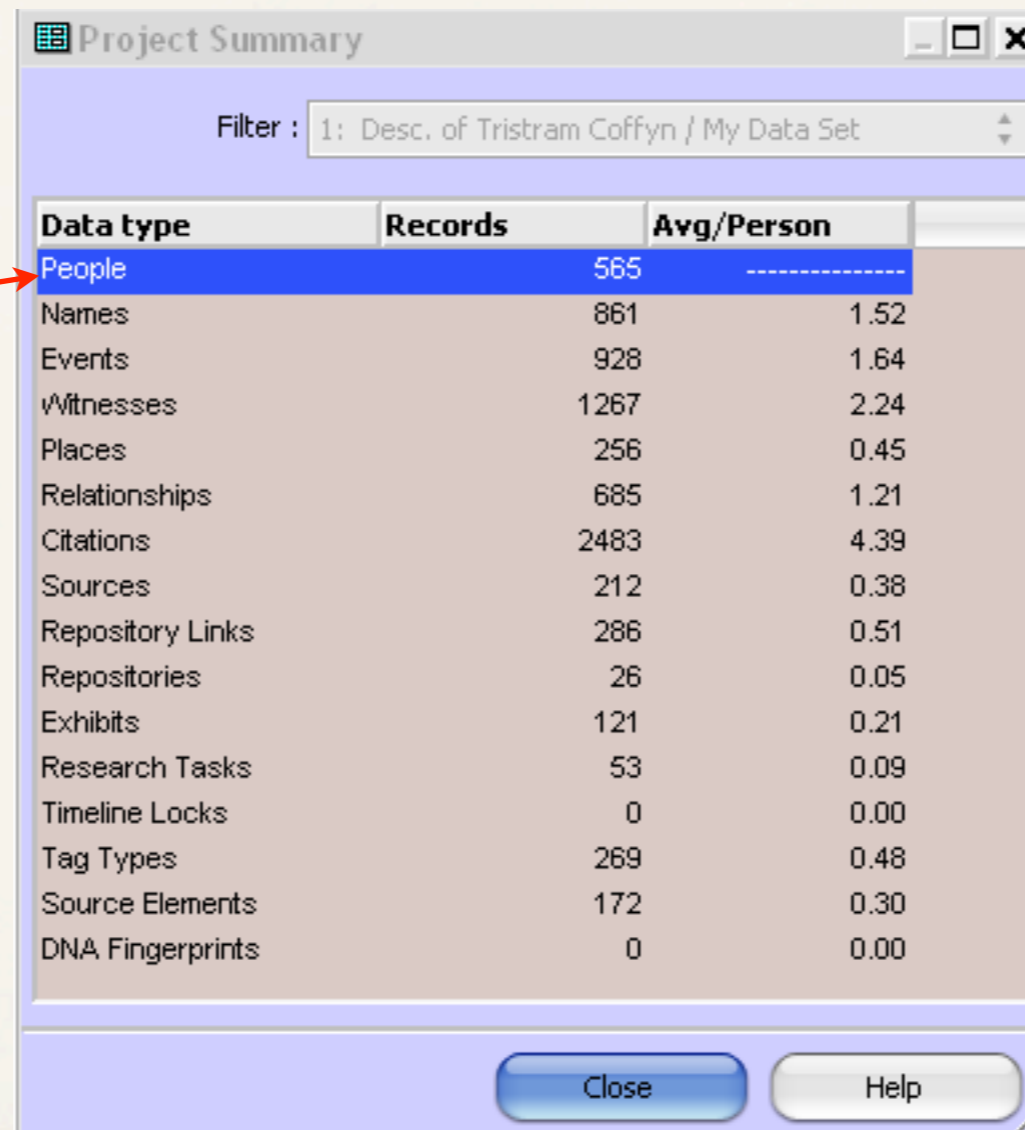
Filter : 1: Walker imported on 02 Oct 2003 12:16:05

Data type	Records	Avg/Person
People	93275	-----
Names	120873	1.30
Events	133744	1.43
Witnesses	165702	1.78
Places	17223	0.18
Relationships	122307	1.31
Citations	202693	2.17
Sources	7378	0.08
Repository Links	14275	0.15
Repositories	244	0.00
Exhibits	5874	0.06
Research Tasks	745	0.01
Timeline Locks	1	0.00
Tag Types	269	0.00
Source Elements	172	0.00
DNA Fingerprints	0	0.00

Close Help

Project Summary of New Project

The new project contains 565 people.



Project Summary

Filter : 1: Desc. of Tristram Coffyn / My Data Set

Data type	Records	Avg/Person
People	565	-----
Names	861	1.52
Events	928	1.64
Witnesses	1267	2.24
Places	256	0.45
Relationships	685	1.21
Citations	2483	4.39
Sources	212	0.38
Repository Links	286	0.51
Repositories	26	0.05
Exhibits	121	0.21
Research Tasks	53	0.09
Timeline Locks	0	0.00
Tag Types	269	0.48
Source Elements	172	0.30
DNA Fingerprints	0	0.00

Close Help

Sharing Your New Project

All you need do from this point is to make a backup of the new project and send that to whoever you wish.

Credits

Thanks to Mike More & Terry Reigel for providing tips.