

FILTER BASICS

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Filters are basically searches of your database. The search can be simple or complex. A filter consists of one or more conditions. Conditions contain three to five elements [**Field, Subfield, Operator, Value, and Connector**] and can contain parentheses and a primary marker. Up to eight conditions can be included in a filter. The filter files are located in the Projects folder. If you pointed TMG to a different Project folder, you can copy all the filters to that folder.

PEOPLE FILTERS

People filters (*.flp) are used to filter the Project Explorer or Picklist. People filters are used for the List of People report and the following reports: Ahnentafel, Audit, Descendant Indented Charts, Descendant Indented Narrative, Distribution of People, Family Group Sheet, Individual Narrative, Journal, List of Names, Pedigree-Compressed, and Statistical Report. People filters are reusable in any of these report, the PE or the picklist.

Start your filter one of three ways: 1) Project Explorer - click on the yellow funnel at the top left of the PE; 2) Picklist - click the Filter button; 3) Report Definition Screen (after selecting a report which uses a people filter, i.e., List of People) - in the "Subject of Report" section of the screen, click "Filtered Group," then click on the Add button under the filter name to create a new filter to open the Report Filter window.

Once in the filter window there are two tabs: Query by Example and Filter.

QUERY BY EXAMPLE

The Query By Example tab is a shortcut for creating simple People Filters for the Picklist, Project Explorer, or the List of People report. It is not available for any other report, even people reports that use saved *.flp filters. It is easier for beginners because you do not have to build filter conditions. Simply fill in the blanks and click on <OK> to filter the list. Many of the conditions available on the regular filter tab are NOT available in the QBE tab.

Use the Query By Example tab to learn how to use TMG's more powerful filtering features. After entering info in search field of the QBE, click on the Filter tab to see how you can represent the same conditions using a filter. Once on the regular filter window, you can further customize the filter, add other conditions, etc. It can help you learn to use some of TMG's most powerful features, including filter operators, AND/OR connectors, parentheses, etc.

The screenshot shows the 'Filter the Project Explorer' window with the 'Query by Example' tab selected. It features a 'Find' section with radio buttons for 'Any person', 'Males', and 'Females'. Below this is a section for 'with a name that contains (optional):' with input fields for Title, Given Name, Surname (containing 'PARKISON;PARKINSON'), and Suffix. There are also checkboxes for 'Only consider primary names' and 'Only consider primary events'. The 'AND' section has two radio buttons: 'Any of the following event characteristics' and 'All of the following event characteristics'. Below this are input fields for 'Date' and 'Place contains' for Birth, Marriage, Death, and Burial groups. An 'Any event group' field contains 'BEF 1890' and 'OHIO/PENNSYLVANIA'. At the bottom, there are buttons for 'OK', 'Load...', 'Save as...', 'Clear', 'Cancel', and 'Help'.

The screenshot shows the 'Filter the Project Explorer' window with the 'Filter' tab selected. It displays a table of filter conditions:

Field	Subfield	Operator	Value	Connect
Surname		Contains	PARKISON;PARKINSON	AND
Any Event...	Year	<	Is le: 1890	AND
Any Event...	Place	Contains	OHIO;PENNSYLVANIA	END

At the bottom, there are radio buttons for 'Primary names', 'Non-primary names', and 'Both'. The same set of buttons ('OK', 'Load...', 'Save as...', 'Clear', 'Cancel', 'Help') is at the bottom of the window.

FILTER TAB

The other tab available for filtering is the Filter tab. Many more options are available than the QBE tab. You create conditions by clicking on the drop-down arrows to select the items to search, then, if you want, you can save the filter. If filtering the PE or Picklist, click "Save as ..." button to save the filter and name the filter. If filtering a report, name the filter at the top in the Save filter as box and click the OK button to save the filter.

FIELDS The field is selected from a drop-down list. The list includes:

- all name fields, including custom name fields
- all flags
- all tag groups (birth, marriage, divorce, death, burial, history, address)
- all name groups (father, mother, spouse, child, son, daughter)
- all tags in your database, including custom tags
- witnessed tags or tag groups
- # of spouses, children, sons, daughters
- # of events, exhibits, task or incomplete tasks
- # of tags by tag group (*same as above*)
- # of witnessed tags by group (*same as above*)
- age, age at death, age today
- any Focus Group
- Dataset ID
- Last Edited Date
- Several Questions:
 - Is/Is not an ancestor
 - Is/Is not a descendant
 - Is/Is not an ancestor or descendant

Primary Indicator: Father* and Mother* only search for the primary parent. To limit other searches to primary events, names, etc., click the box to the left of the field which adds an asterisk to that search condition.

SUBFIELDS Fields followed by three dots have subfields to choose from. The subfields vary based on the field selected. Most contain all the fields included in the tag entry screen, including nine memo fields, plus "Any Place Field," Role and Sentence or Sentence (default). (NOTE: I do not see a way to search the Witness Memo...) Subfields also include selections for finding the number (#) of citations, tasks, tags, exhibits. The principals and witnesses cannot be specified in people searches.

OPERATORS These vary widely and depend upon the Field and Subfield. When text is involved, the following operators are usually available:

<	Comes before	Begins with	Is between	Is not like
<=	Does not come after	Contains	Is empty	Soundex equals
<>	Does not equal	Does not begin with	Is like	
=	Equals	Does not contain	Is not	
>	Comes after	Does not end with	between	
>=	Does not come after	Ends with	Is not empty	

For Date, the list changes:

<	Comes before	Contains "?"	Is empty	Is not empty
<=	Does not come after	Does not contain "?"	Is exactly	Is regular
<>	Does not equal	Has modifier	Is irregular	
>	Comes after	Has no modifier	Is not 'Old	
>=	Does not come after	Is 'Old Style'	Stlye'	

For Year, the list is a little different from the list for Date:

<	Is less than	>=	Is not less than	Is circa	Is not exactly
<=	Is not greater than			Is empty	Is within 10 years
>	Is greater than		Includes	Is exactly	Is within 2 years
				Is not empty	Is within 5 years

For # fields or subfields:

<	Is less than	<>	Does not equal	>	Is greater than
<=	Is not greater than	=	Equals	>=	Is not less than

VALUE Entered when the operator requires a value. Values are not case sensitive. You can enter [?] instead of a value and when the filter is run, it will ask you to enter a value. See examples in the Favorite Filters section.

Pipes: A vertical line (|) may be used in the value field and the terms will be searched as if connected by OR. For example, BOB|ROB will match BOB OR ROB. You may use more than one OR; for example, ELLS|EELLS|ELS|EALLS. Another example might be: Any Birth Group tag; State Contains VIRGINIA|TENNESSEE|NEW YORK, which is interpreted as VIRGINIA OR TENNESSEE OR NEW YORK.

CONNECTORS Lastly, the connector is added to the condition. Three connectors are available: AND, OR and END. Which connector, depends on the search being conducted.

OTHER CONSIDERATIONS

Primary or Non-Primary: In addition to the Primary indicator box by the conditions, at the bottom of the filter screen for the PE and Picklist there are radio buttons which will limit the output to Primary or Non-primary names or Both.

Add Relatives: For the Report filters (not the PE or Picklist) the last filter step is to decide what relatives to add to the filter. Check the box(es) at the bottom of the screen to add Spouses, Ancestors or Descendants and identify the number of generations to add. The Focus Group add relatives function is more comprehensive and can select some vs. all of the individuals in the group.

Dates with Modifiers: The Operators for the Date and Year filters can produce very different results when the date includes a modifier. There is a significant difference between the condition "Year > is greater than 1880" and the condition "Date > Comes after 1880". The "Year >" condition turns up dates such as "after 1750," whereas the "Date >" search results do NOT include dates which are input as "after YYYY" when YYYY is 1880 or earlier. Also, remember, if you only use the year with a date search, it considers the date to be 1 Jan.

Principal vs. Witness: A condition that searches a specific Tag type, will only find principals with that Tag type. A search of the "Witnessed" Tag type will turn up the "Other" witnesses.

Unfiltering the Project Explorer: Remember to unfilter the PE. If the PE is filtered, the word Filtered appears at the top and the unfilter funnel is in color.  Just click on that funnel to clear the filter.

COMBINING FILTER CONDITIONS

Boolean logic applies and the NOT operator is usually available either in the operator field or in the Field or Subfield. No more than eight conditions can be included in a filter. The more conditions, the longer the filter takes to run. Some conditions are slower than others. Experiment.

When the OR connector is used parentheses become available. Click on the boxes to the left or right to add parentheses. Make sure all parentheses are properly enclosed or the filter will not run. Searches without parentheses can easily miss some of the intended people. For example, suppose you want to find all the people with a certain surname except those born in the last half of the 19th century. The filter must use parentheses:

<u>Field</u>	<u>Subfield</u>	<u>Operator</u>	<u>Value</u>	<u>Connect</u>
Surname		Equals	NAME	AND
(*Birth Date		Comes before	1850	OR
*Birth Date		Comes after	1899) END

Without the parentheses, this filter would find people with the Surname NAME who were born before 1850 and all people born after 1899, not the intended universe!

The List of People report can perform secondary actions including creating a new project, a new dataset, or setting the value of a flag. All of these secondary actions can be checked first before accepting the change by viewing the report first. If you are not happy with the output in the report, just close the report and then say "No" to changing the flag.

SAVING FILTERS

After you develop a filter that works, you can save the filter for future use. Name it something descriptive so you can find it later. People filters can be used in the PE, picklist, LOP reports and the other reports identified above. (*.flp) The other filters can only be used for their reports. Remember, you can also save the Report Definition, including the correct filter and whatever options you have selected or changed on the Options tab. Saving the report is especially helpful when you change Output Columns or Secondary Output. Reset TMG's standard reports by "deleting" the report. A window comes up asking whether you want to reset the options to the default. Answer Yes if you want square one.

FOCUS GROUPS

After you filter the PE to locate the desired people, if you just leave the filter on, it reruns when you change a person who was covered by the filter. Instead, put the people in the filtered PE into a Focus Group and Export/Save the Focus Group to work through later. This works great for clean-up and researching particular databases. To create a new Focus Group:

- click on the  icon on the toolbar
- click on the Remove All button
- move cursor over PE and right click
- select "Add all names to Focus Group" and names appear in Focus G
- click Export button to Save the Focus Group
 - Load a saved Focus Group by "Importing"

OTHER FILTERS - REPORTS

List of Event Filters

Besides being able to search all the fields in a Tag like the LOP filters, you can filter for Principal1 or Principal2, Tag Type or Tag Type group; any citation, any witness and sureties. You can filter for Date/Sort date by Century, Day, Day of Week, Month, and Year. Like people filters you can search on the number of witnesses, of other witnesses, citations, exhibits, task or incomplete tasks. The LOE's different fields have very different subfields. Experiment. You can use the LOE to change various Flags, too. See below.

Filters for Other List Reports

The filters for other reports differ. You need to experiment. The filters for the List of Tasks are VERY different. Sometimes the names on the drop-down list are not intuitive. For example, to search the "Comments" tab of a Source, you select "Memo" vs. Comments which is not an option. (Below list courtesy of *Glenn Gilbert*.)

<u>File Type</u>	<u>Where used</u>
.flp	List of People, etc.
.flc	List of Citations
.fle	List of Events
.flk	List of Tasks
.fli	List of Places
.fln	List of Names
.flr	List of Repositories
.fls	List of Sources
.flw	List of Witnesses
.fly	List of Tag Types

FLAGS

The List of People report can set the value of a FLAG. The ability to set flags greatly extends the capabilities of the filters which are limited to eight conditions per filter.

The Flags window is not open in TMG's standard layout. To see the Flags, open the Flags window by clicking the Flags window toolbar icon -  - or use the Windows > Flags menu command. Besides the Ancestor and Descendant Interest flags, the Standard Flags are:

FLAG	Values	Meaning
Sex	?,M,F	Control sex of person. Used for pronoun in narrative reports.
Living	?,N,Y	Used when report or export option "Suppress details for living people" is selected. Also used for Age in box. Shows "Dec'd" if flag set to N.
Birth Order	?,1,2,3,4,5,6,7,8,9,10	May use if order known but dates not known.
Multiple Birth	?,1,2,3,4,5,6,7,8,9	May be used to record multiple births. No TMG function.
Adopted	?,N,Y	May be used to mark adopted children. No TMG function.

The List of Events report can also set the value of a FLAG. Go to the Secondary Output tab on the LOE Options window. Using the LOE, you can change Flags selectively. Change them for All Witnesses, P1, P2, both Principals, Other Witnesses or just a certain Role.