

# Outside the Box Reports (Generation Numbers)

“I want to create a report that lets me identify the earliest and latest birth and death dates within each generation from a designated progenitor. How can I do that?”

This problem solution uses a traditional report in a very untraditional manner, and it's one of the few reports that is not affected by person TMG data entry protocols.

- This report must include a generation identifier. The generation identifier varies depending on the focus person, so there is no easy way to add this as a flag, a tag, or a reference number.
- This need for a fluid generation number limits the report choices to: Descendant Indented Chart, Descendant Indented Narrative, or Journal reports. Narrative reports include too much information, so this report uses the Descendant Indented Chart (DIC).

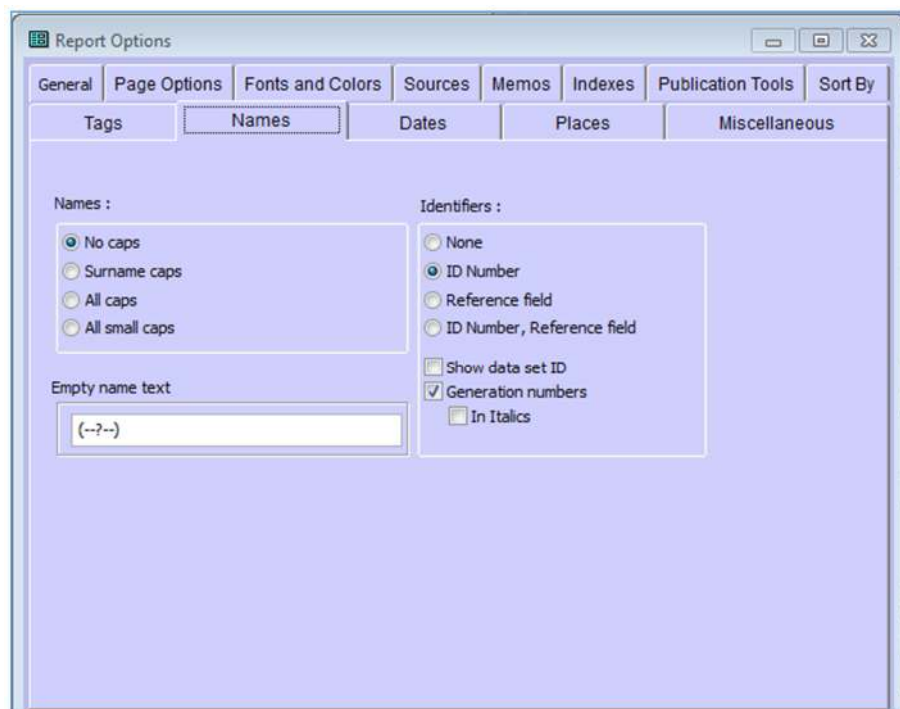
DIC outputs include only text forms (Word, ASCII, RTF, etc.), and these cannot be sorted by dates or filtered by generation number. Therefore, the selected output must be one that can be imported into Excel or another spreadsheet program.

Spreadsheets can import text files, but cannot import Word, RTF, etc. Unfortunately, I could not force the ASCII or ANSI report outputs into something that did not include an occasional line break that was imported as an extra row. Therefore, the initial TMG report output I chose was Word. That Word file could then be saved as a text file, and the text file imported into Excel.

## The Initial Descendant-Indented-Chart Report

---

What is wanted is a very bare-bones report that includes (1) Names, (2) Generation numbers, (3) ID numbers (optional), (4) Birth tag – date only, and (5) Death tag – date only. These screen shots show these options.



Report Options

General Page Options Fonts and Colors Sources Memos Indexes Publication Tools Sort By

Tags Names Dates Places Miscellaneous

Tag types

- ☒ Birth
- ☐ Marriage
- ☒ Death
- ☐ Burial

OK Cancel Help

Report Options

General Page Options Fonts and Colors Sources Memos Indexes Publication Tools Sort By

Tags Names Dates Places Miscellaneous

Date format :

- ☐ mm/dd/yyyy
- ☒ yyyy.mm.dd
- ☐ dd/mm/yyyy
- ☐ dd.mm.yyyy
- ☐ dd-mm-yyyy
- ☐ Mmm dd, yyyy
- ☐ MMM dd, yyyy
- ☐ dd Mmm yyyy
- ☐ dd MMM yyyy
- ☐ Years only
- ☐ Months spelled out
- ☒ Leading zeros (e.g., 09)

This date format is important. The yyyy.mm.dd format, with the leading zeros checked, will sort in chronological order.

**Report Options**

General | Page Options | Fonts and Colors | Sources | Memos | Indexes | Publication Tools | Sort By

Tags | Names | Dates | Places | Miscellaneous

**Places :**

☐ Use place styles  
☐ Use Short Place field  
☒ Use selected place fields

☐ [L.1] - Addressee  
☐ [L.2] - Detail  
☐ [L.3] - City/Town  
☐ [L.4] - County/Parish  
☐ [L.5] - State/Province  
☐ [L.6] - Country  
☐ [L.7] - Postal code  
☐ [L.8] - Phone  
☐ [L.9] - Lat/Long  
☐ [L.10] - Temple  
☐ Commas when missing  
☒ Trim leading and trailing commas

**Preposition :**

☐ At  
☐ In  
☒ (blank)

☐ Abbreviate states/provinces in the output  
 (Note: this option does not affect filters)

This is a method for eliminating place information in this report. Choose “Use selected place fields” and do not select any fields.

**Report Options**

General | Page Options | Fonts and Colors | Sources | Memos | Indexes | Publication Tools | Sort By

Tags | Names | Dates | Places | Miscellaneous

**Exclusion :**

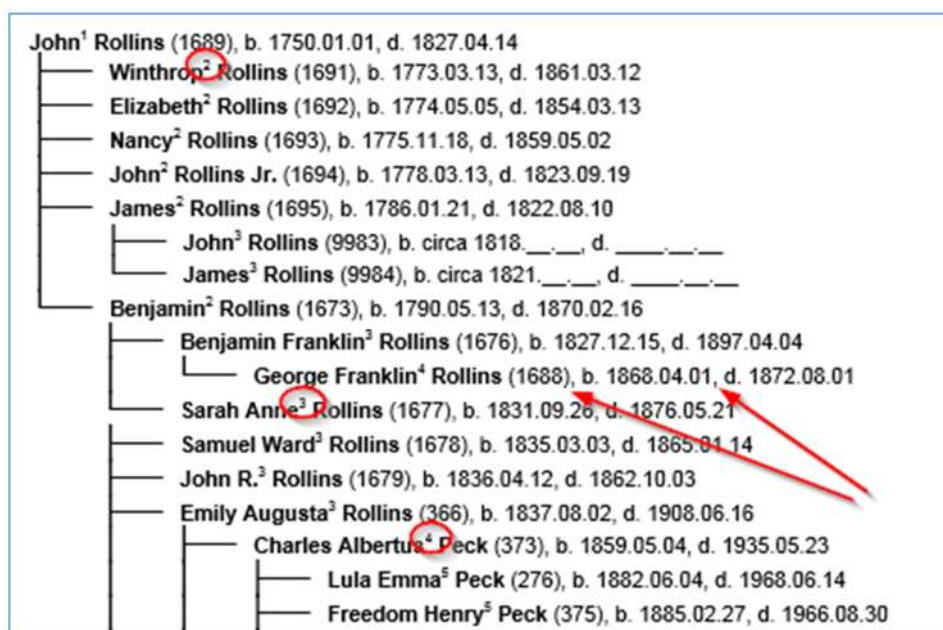
☐ Show excluded data  
☐ Show sensitive data  
☐ With markers

**Other :**

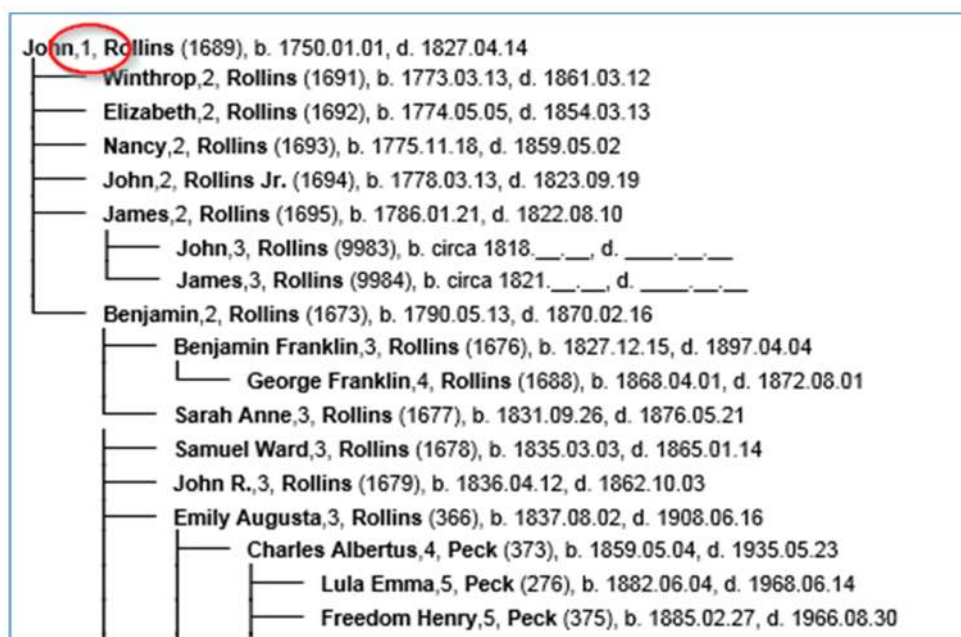
☐ Spouses  
☐ Unknown spouses  
☐ Repeat duplicate lines  
☒ Blanks for missing data  
☐ Suppress details for living people  
 Living text:   
☐ Follow surname only

Be sure to check “Blanks for missing data.” This guarantees that empty date fields will still sort correctly. If spouse information is also wanted, check the “Spouses” box. Don’t include the marriage tag, though. That causes problems in aligning spreadsheet columns correctly.

## Creating the Text File for Import



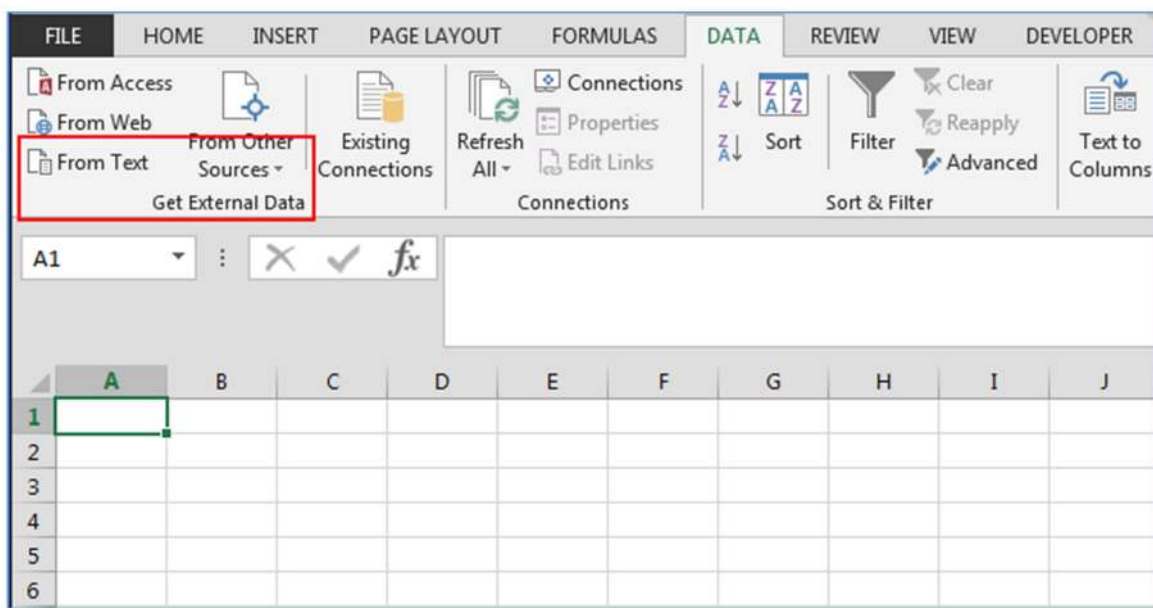
The Excel text import requires some kind of separator to identify each field/column in the row. The best separator available in this report is the comma, already present and separating the two date fields from the rest of the row. The generation numbers (circled) must be delineated. This can be done with a Word *wildcard* find-and-replace.<sup>1</sup> Find: (\*>) [with wildcard options and formatting superscript; Replace: ,\1, [with wildcard options and formatting standard]. This converts each generation number from superscript to standard font, and surrounds it with commas. Save as a *plain text* file using Word's default values.



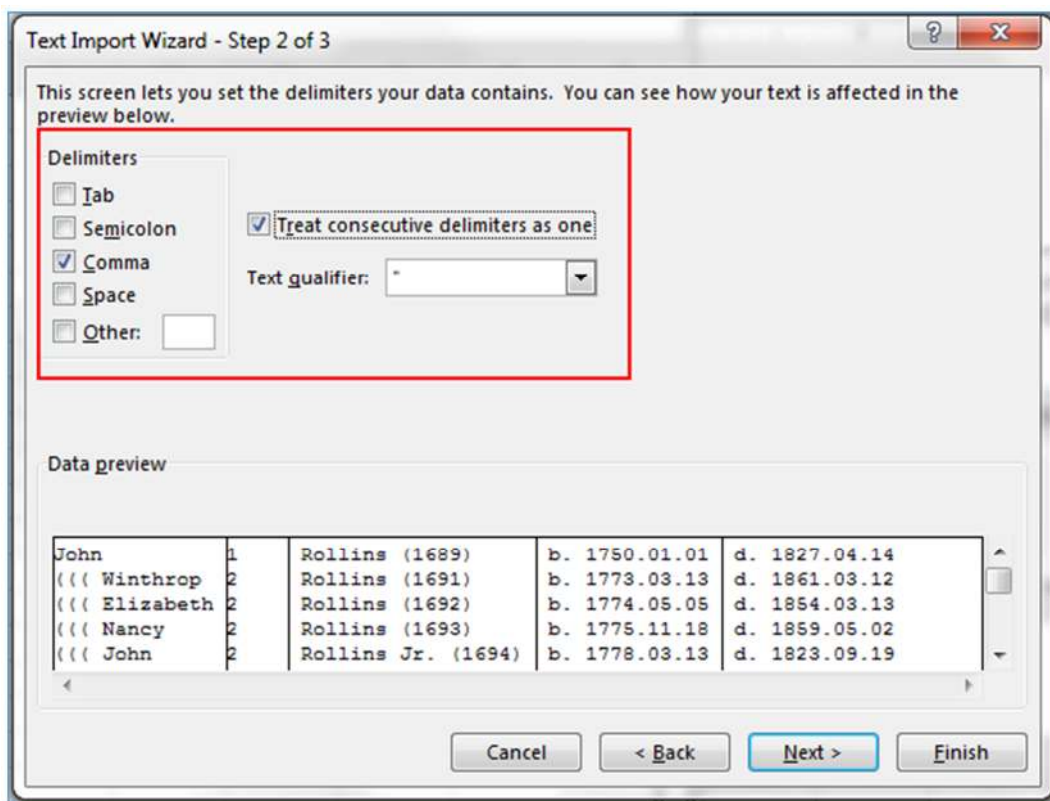
<sup>1</sup> This is a good site for learning more about Word and wildcards. <http://wordmvp.com/FAQs/General/UsingWildcards.htm> : accessed 26 April 2017.

## Importing the Text File

Open a blank Excel worksheet and import the text file. In Excel 2013, this command sequence is: **Data > (Get External Data) From Text > navigate to text file > Import.**



Excel places imported text data into fields based on one of two options, *Delimited* and *Fixed width*. Fields in this report are delimited by commas. The command sequence here is: **Delimited > Comma** and **Treat consecutive delimiters as one** (irrelevant here, but will become important) > **Column data format is General.**



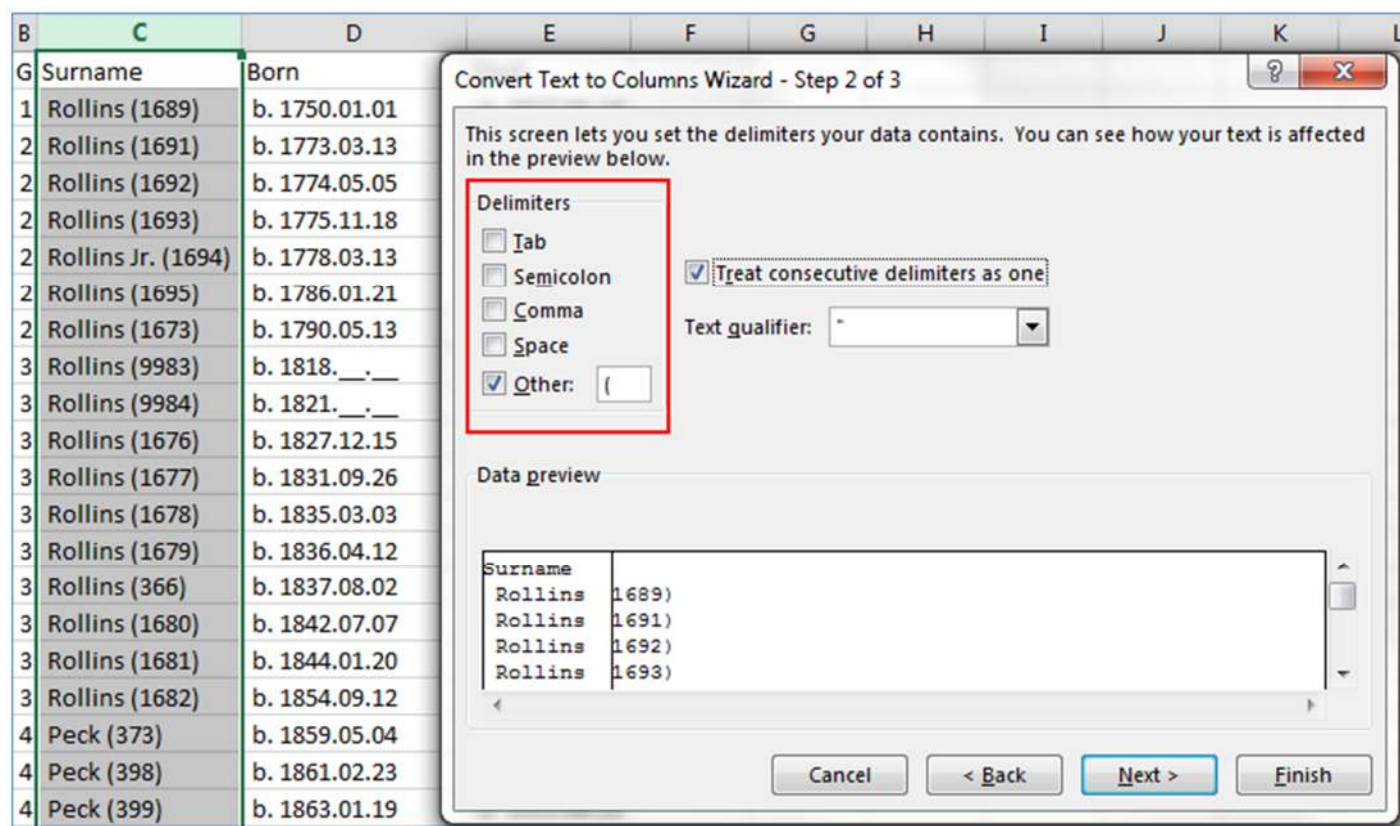


As is, this report works if there are no date qualifiers, e.g., *circa* or *before*. Those must be removed, so it's a good idea to clean up the columns. Select the first column; **find** all opening parentheses and **replace** with nothing. **Find** all date qualifiers, **b.**, and **d.** in the Born and Died columns and **replace** with nothing.

Include headers, if you want: Name, Generation number, Surname, ID number, birth date, and death date. The chart can now be sorted and filtered in any way you choose. Note that you cannot sort both birth date and death date effectively at the same time.

## Text to Columns

“Text to Columns” is an important spreadsheet function. It splits one column into two or more columns based on delimiters or fixed width options. If you included ID numbers in this report, those are now part of the surname column. They can be placed in their own column using the “Text to Columns” function, **Data > Text to Columns > Delimited > Other (**, and then remove the closing parenthesis with **find and replace**. Including ID numbers is irrelevant in this report, but it is necessary when enhancing this report and others.



Variations: (1) You can include places in the report, adding information that might highlight migration patterns. (2) If you choose, you can include spouses. (3) Assuming you've included ID numbers in your report, you can add a parent list report and, using Excel's VLOOKUP function, add columns to include parents, making the report more informative.