

TMG Family Reunion Reports

At our June meeting, Bob Velke returned for his second presentation this year. See our February 2012 newsletter for his January 2012 presentation featuring the debut of TMGv8. For this meeting we asked Bob to focus on the report features in TMGv8. Rather than just showing how each report in TMG works, we asked Bob to suggest how the reports in TMG can be used for a family reunion. The goal is to manage tasks associated with the reunion, and perhaps generate materials to make the reunion interesting and fun for all attendees. During the presentation, Bob described his personal experiences with reunions and several attendees added their own observations. This article attempts to capture key concepts and provide an overall road map for using TMG for a family reunion.

Not all the words are Bob's, especially those regarding the filters and the "How-To"s. For any discrepancies we apologize to Bob and to you. Let us know if you find any and send us your suggestions for future publication in the newsletter.

Reunion Preparation

The first task would be to send out invitations to possible participants. If you have entered snail mail addresses in TMG you can create a list using TMG. However, first we need to create a flag to identify the ancestors and their living descendants who we want to attend. Bob used the SAMPLE.pjc, but this article uses generic examples you can easily adapt to your own projects. We will set up a number of flags throughout this article, some we use more than once. Right now we need a flag to identify two of the ancestors who are the focus of this reunion. Frank's descendants are flagged by 'F' in DESC_FAM, Harry's descendants by 'H'. *Figure 1. Create a Flag (DESC_FAM) to Identify the Descendants of a Person* shows the flag definition screen.



Figure 1. Create a Flag (DESC_FAM) to Identify the Descendants of a Person

TMG automatically sets the flag to the default setting, '?', when you close Flag Manager. Now we can use descendants of Frank and Harry. You need to know their ID numbers. A simple List of ... People report will let you set the flags for each ancestor line using Secondary Output and the flag DESC_FAM.

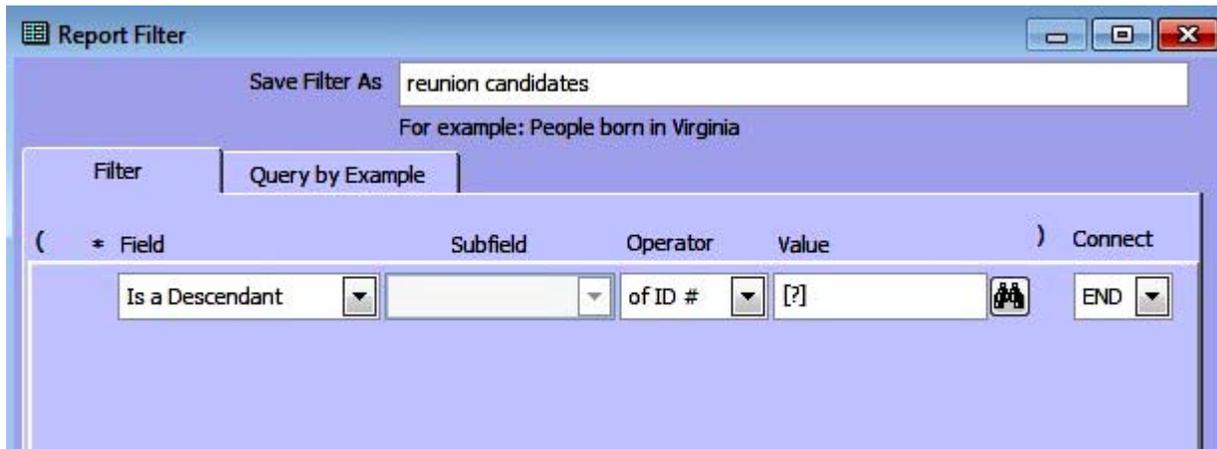


Figure 2. Selection Criteria for a Descendant

The example above shows the filter to flag the reunion candidates. Click 'OK'. Open the Options Tab and select Secondary Output. Check the box 'Change Flag', select 'DESC_FAM' and fill in the value for the first ancestor, say 'F'. If you are satisfied with the output to be flagged, respond 'Y' to the TMG prompt. Repeat the process for the other ancestor, 'H'. Don't forget to uncheck the 'Change Flag' setting when you complete the last ancestor. You can use as many ancestors as you need.

Now that the ancestors and their descendants have been identified and flagged we can get the invitations ready to send.

Invitations

To generate an address list for invitations, the natural inclination would be to go to the Menu Report> List of...>People, but to send invitations, the addresses of the people are required. Instead one needs to go Report> List of...> Events.

Report Definition Screen – List of Events appears. The Configuration name is 'List of Events'. Click the radio button for Filtered group and type in the empty box Address List.

There are many addresses in the project so a filter needs to be created to select only those of interest. Use Report> List of... Events. In the Report Definition Screen use the Add button, the name Address List was entered.

Pull down the selection arrow in the default entry 'County' and select 'Tag Type Group' near the bottom. The default event filter group for Address appears. Because we need to add more criteria, change 'END' to 'AND' and pull down the selection arrow in the 'Address' line. Choose Principal1 from the drop down list. In the Subfield select or type Living; in the Value field type Y. Continue building the filter as in *Figure 3. Filter Selection Criteria for the Address List* below.

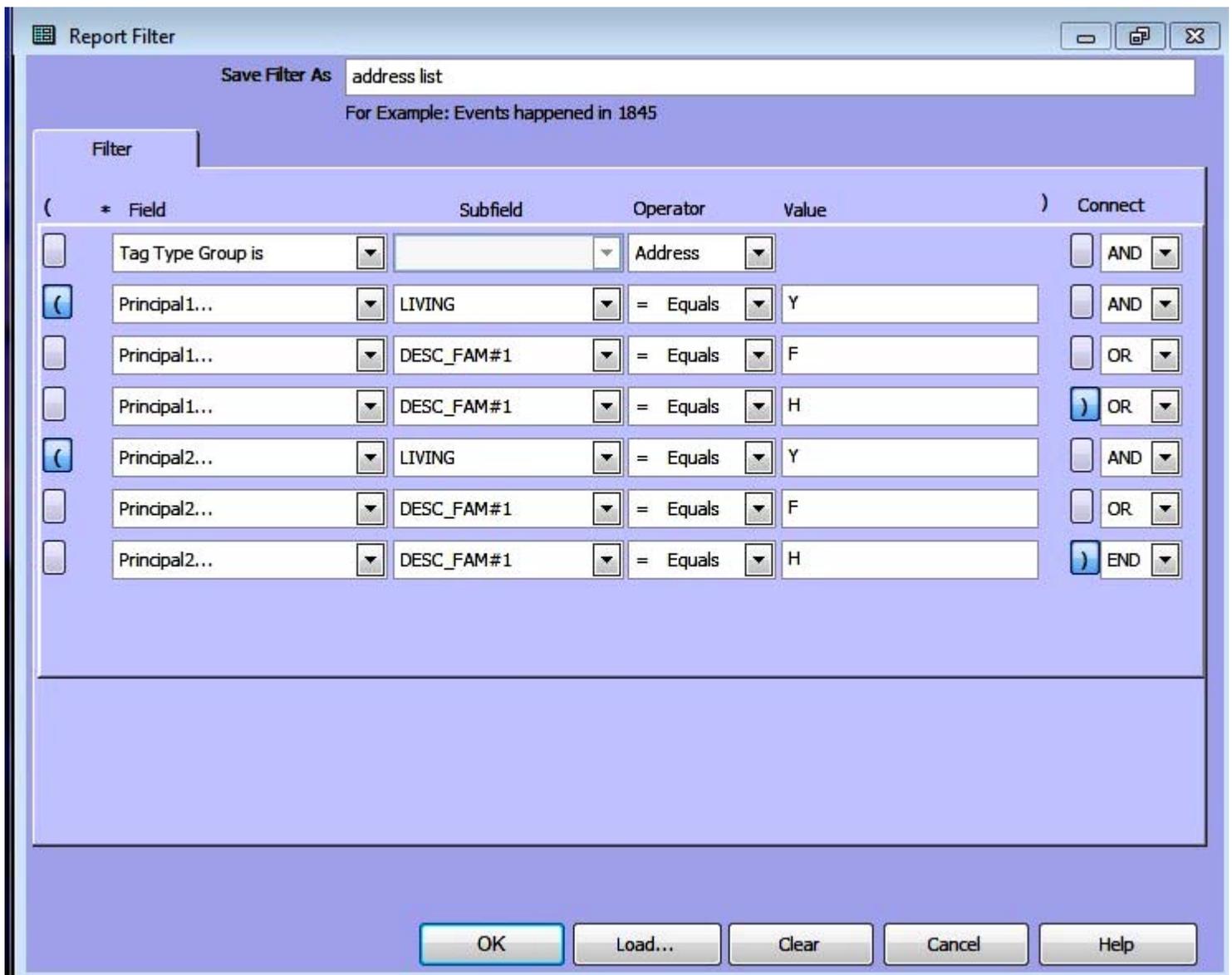


Figure 3. Filter Selection Criteria for the Address List

Strictly observe the 'AND's, 'OR's, and parentheses. 'OK' button to quit the filter. Back on the Report Definition screen choose the Options tab, then the Output Column's tab. Enter the fields that follow: 'Prin1 Given, Last', detail, city, state, postal, etc. (Assume that the street address is in the detail field.) [You may need to adjust the place fields to get the desired results in your address list. Select your Address List Report>Options>Places>Use selected place fields and check or clear the fields needed to prepare your address list.] See *Figure 3a. Address List Output Format*.

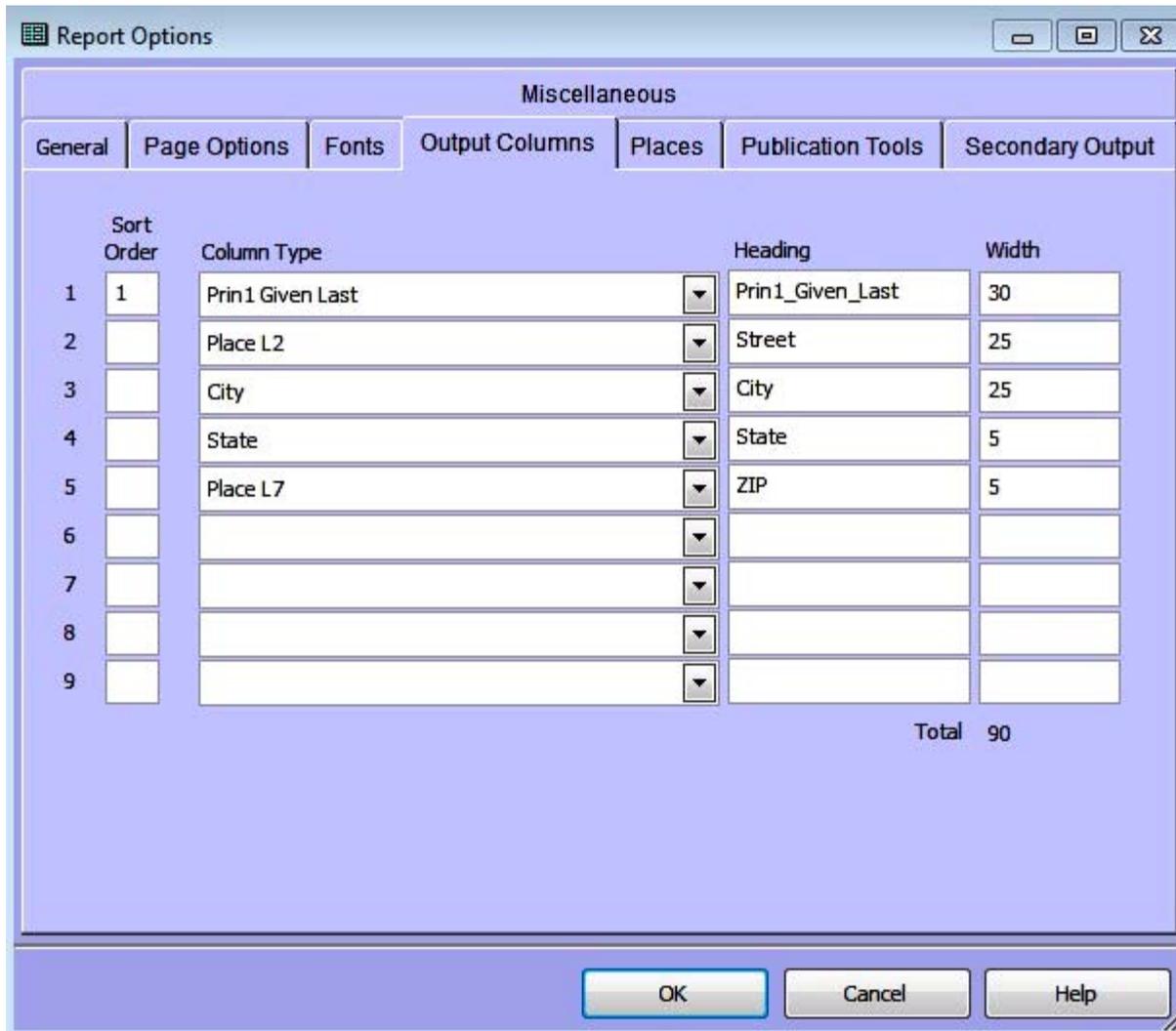


Figure 3a. Address List Output Format

Next create an INVITE flag. It only has three entries: '?', 'N', and 'Y'. Prepare the flag as before. We'll use it shortly. Still in the Options area, switch to Secondary output. Check the 'Change Flag' box for the flag INVITE, value 'Y'. NOTE: You may want to delay setting the INVITE flag until you have run the report several times to verify the output is what you want.

Back on the Report Definition screen: In the Report Destination area Click the radio button 'Save to:' and in 'File type:' use the pull down arrow to select 'Microsoft Excel v5 (XLS)'. On the 'File name:' line add the name you want, like "Reunion Addresses 2012". Then choose the Create Report button. A splash screen appears with the records available and records that pass the criteria. When the output report appears, check the results for their reasonableness. The address list results have been exported to Excel. *See Figure 3b. Excel Output for Address List.*

	A	B	C	D	E	F	G
1	Name	Street	city	state	zip		
2	Frances Annette Jones	1333 Twin Ponds Dr	Williams	IN	47470		
3	Jenny Rebecca Jones	215 Davidson St	Chula Vista	CA	91910		
4	Kevin Broc Smith	619 Bur Oak W	Lafayette	IN	47909		
5	Margaret Jane Jones	8805 Royal Meadow Dr	Indianapolis	IN	46217		
6	Mark Benham Jones	7457 Donegal Ln	Indianapolis	IN	46217		
7	Mary Jo Jones	159 FM 2976	Haskell	TX	79251		
8	Megan Marie Hugo	780 W G Street Apt 467	San Diego	CA	92101		
9	Michael E. Jones	9407 Canterring Pl	Springfield	VA	22153		
10	Ruth Eleanor O'Hannon	5 Banta Road	Indianapolis	IN	46217		
11							
12							

Figure 3b. Excel Output for Address List

WORD's Mail Merge function can be used to add the addresses to a 'boiler plate' letter for each attendee and also to prepare mailing labels. Mail Merge is beyond the scope of this discussion, but is described in your word processor documentation. WORD's Help for Mail Merge is very good.

Figure 3c. Example of Mailing Labels shows an example of the address labels produced from the Excel Output using Mail Merge. The labels used are standard labels 1.33 inches by 4 inches and can be found in most office supply stores.

Frances Annette Jones
1333 Twin Ponds Dr
Williams, IN 47470

Jenny Rebecca Jones
215 Davidson St
Chula Vista, CA 91910

Figure 3c. Example of Mailing Labels

Note that a filter is associated with a particular report, and is not always available for other reports.

Back to the reunion, now that invitation letters have been prepared and sent, you need to keep track of the invitee's responses. We will prepare an RSVP flag for that.

RSVP

The INVITE flag can assist in tracking invitee responses. The possible flag values are "?", "Y", and "N". Create the flag and set it to "Y" with the same criteria you used to create the Address List, i.e., *Figure 3. Filter Selection Criteria for the Address List*. Setting the Project Explorer filter using the flag INVITE with value set to 'Y' displays only those relatives who were sent an invitation. This makes it easier to locate and update the RSVP flag for the invitees and also the RSVP flags of others living with the invitee's family, like spouse, children, and possibly others who also plan to attend.

To track the response of our invitees and family members, we'll create a customized flag named RSVP. From the Menu Toolbar select File>Flag Manager. See *Figure 4. Create RSVP Flag* below for the design.

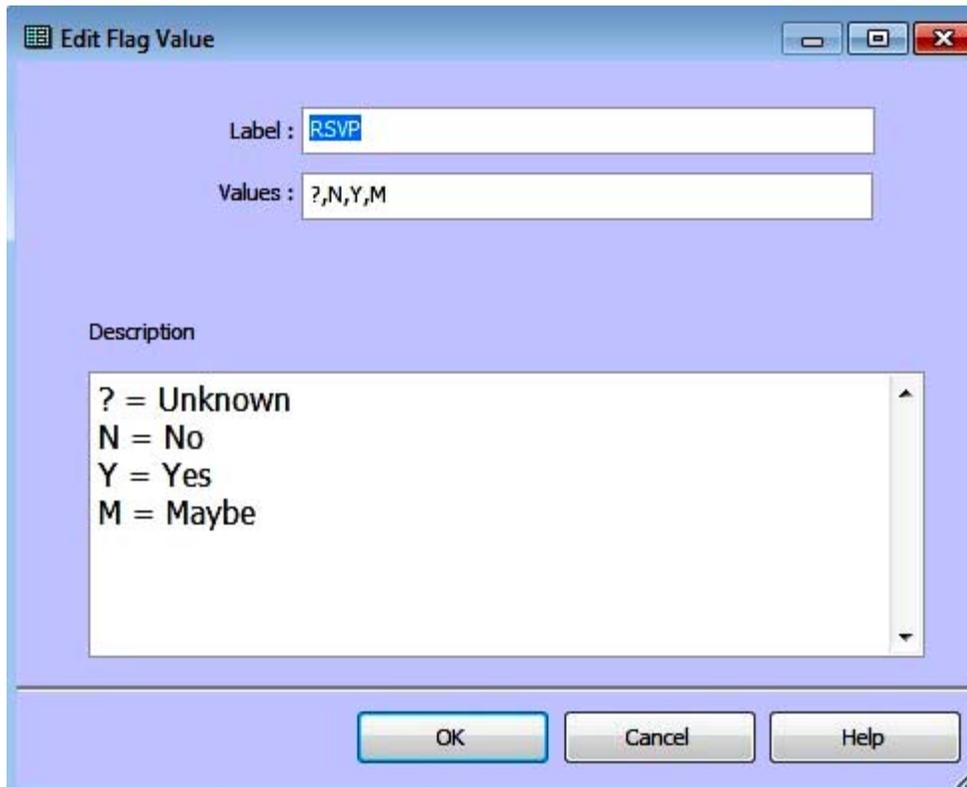


Figure 4. Create RSVP Flag

Again the Add button allows the creation of values shown in *Figure 4. Create RSVP Flag*. In this window four possible values have been included. The order of appearance in the Values field is important since the first value '?' - Unknown will be the default. [Note: '?' is the standard for an unknown value.] The RSVP Flag will be set to '?' for all records when the Flag Manager is closed.

As invitations are returned, the RSVP flag of the respondents can be changed to reflect their plans. Since the responses will arrive sporadically, make the changes in status directly via the flag window as described in the opening paragraph of this section. A response of "maybe" would call for additional reminder letters. Once the deadline for responding has been reached, the resources required to support the participants can be ordered.

Name Tags

Name tags are essential to help people associate faces with names. Bob described his name tag format. He prints first name followed by their surname on a line below. The last line of the name tag would be "descendant of ..." (filling in an ancestor's name). For those adults who are not direct descendants but are spouses, their third line would be "Spouse of Descendant of ..." (the ancestor's name).

For the preparation of Nametags we will use two flags we created earlier, DESC_FAM and RSVP. We want the descendants of Frank and Harry (from DESC_FAM) and we want to make name tags only for relatives who have said they will attend (from RSVP). And we also want to retrieve the spouses of the descendants. With this information we have enough to make the name tags. Use the filter in *Figure 5. Filter Selection for Name Tags*.

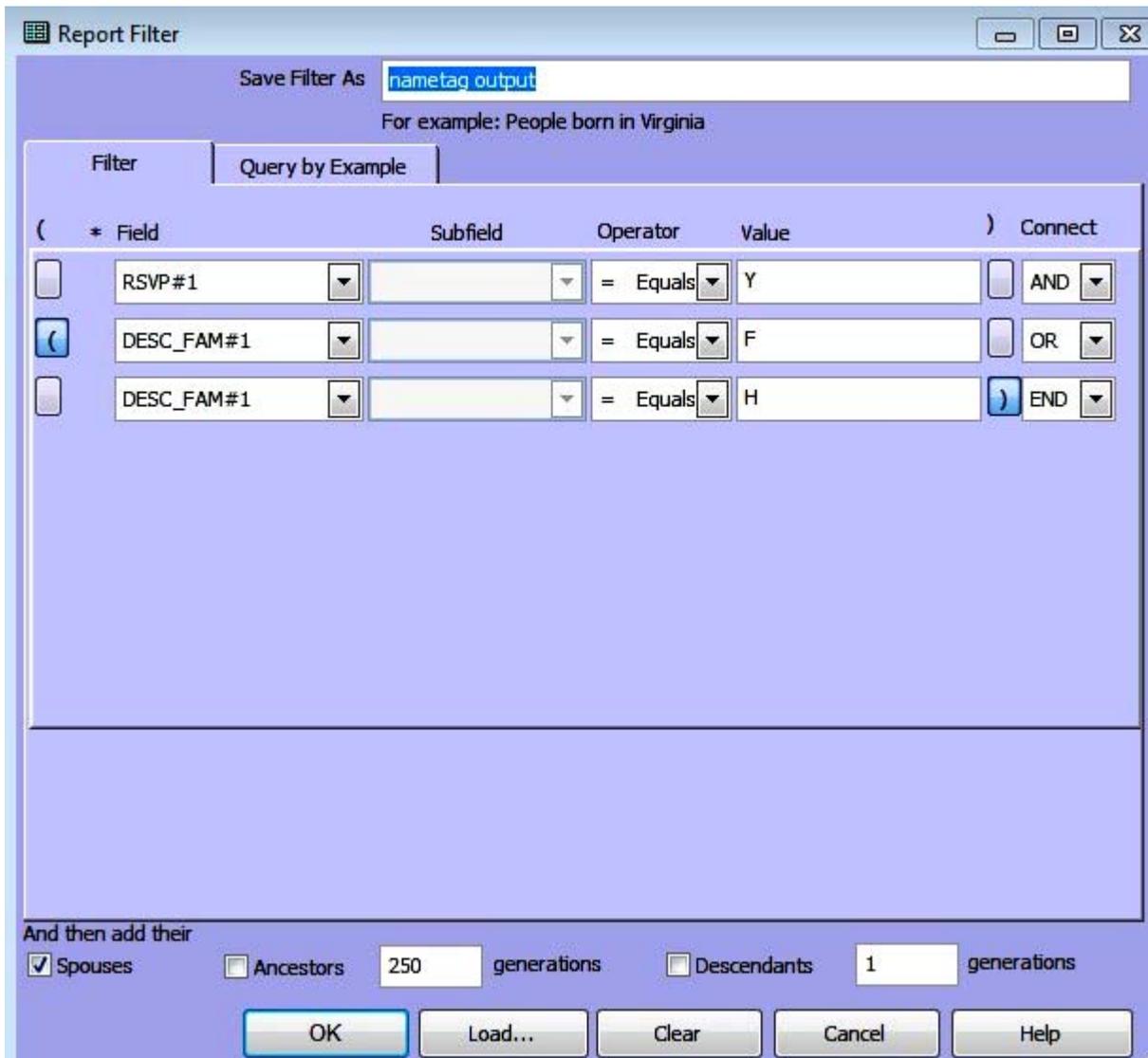


Figure 5. Filter Selection for Name Tags

Note that the box for 'Spouses' is checked. Verify the accuracy of your report. Then send the report to Excel as we did earlier for addresses. See *Figure 5a. Name Tag Output Layout*.

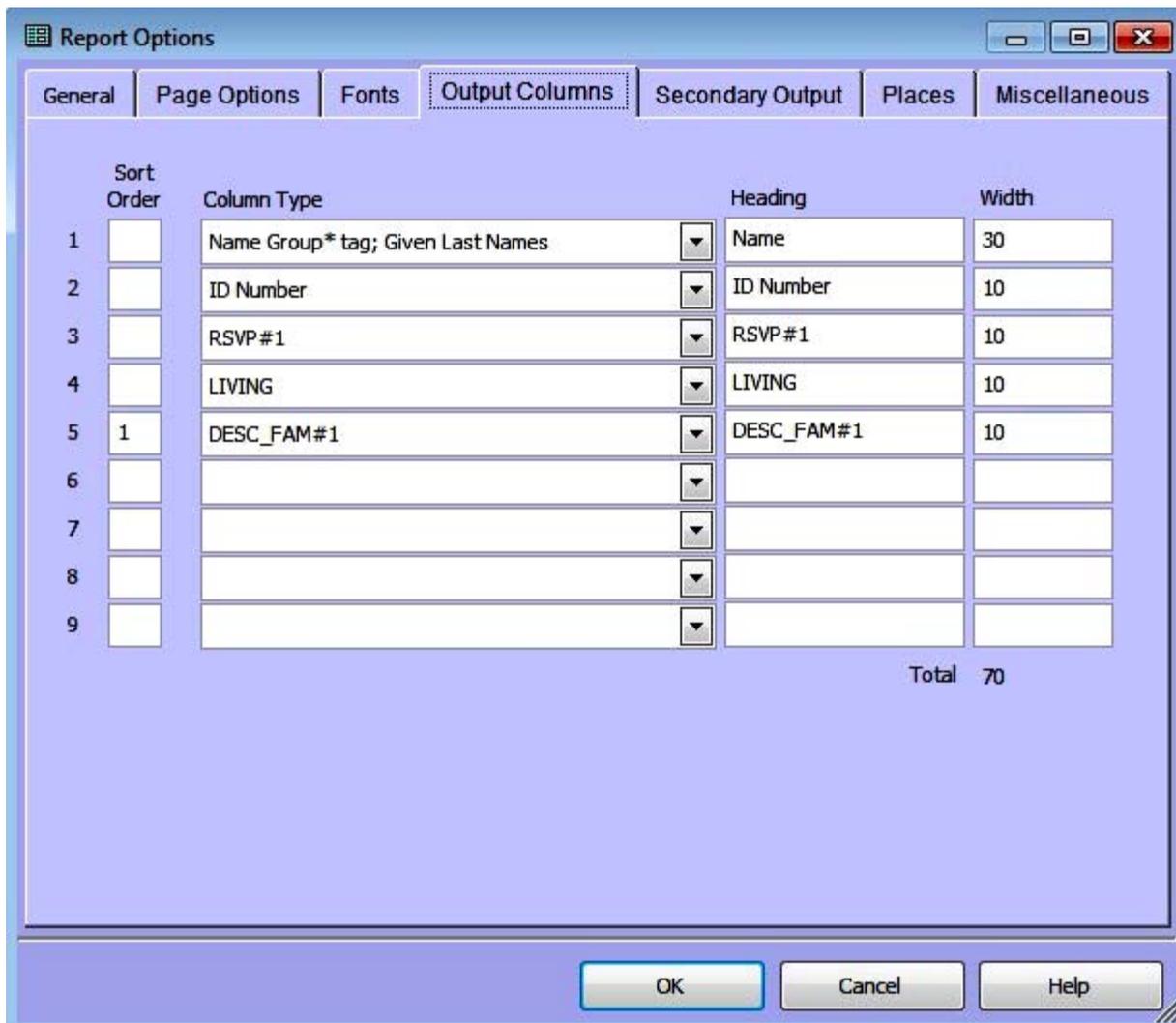


Figure 5a. Name Tag Output Layout

There are a few edits to make to the Excel output. The lines below are a part of the total file. They have been edited using the description below *Figure 6. Excel Output*.

A1	First Name	Surname	idnum	rsvp1	living	FAM	Relationship	Ancestor
1	Anna Maude (Brown)	Jones	369	?	N	?	Spouse of Descendant of Frank C Jones	Descendant of Frank C Jones
2	Cathy (Apple)	Jones	6142	Y	Y	?	Spouse of Descendant of Frank C Jones	
3	Daniel Christopher	Maroon	2527	?	Y	?	Spouse of Descendant of Frank C Jones	
4	Frances Annette (Jones)	Smith	418	Y	Y	F	Descendant of Frank C Jones	
5	Frank C Jones		368	Y	N	F		
6	Heather Lynn (Service)	Smith	5052	Y	Y	?	Spouse of Descendant of Frank C Jones	
7	Elaine (Dallas)	Jones	364	Y	Y	?	Spouse of Descendant of Frank C Jones	
8	James Nicholas Smith		419	N	N	?		
9	James Patrick Hugo		421	Y	Y	?	Spouse of Descendant of Frank C Jones	
10	Jenny Rebecca Jones		1274	Y	Y	F	Descendant of Frank C Jones	
11	Kevin Broc Smith		1166	Y	Y	F	Descendant of Frank C Jones	
12	Klara Kellen Smith		6141	Y	Y	F	Descendant of Frank C Jones	
13	Margaret Jane (Jones)	Hugo	420	Y	Y	F	Descendant of Frank C Jones	
14	Mark Benham Jones		416	Y	Y	F	Descendant of Frank C Jones	
15	Megan Marie Hugo	Medium	1163	Y	Y	F	Descendant of Frank C Jones	
16	Melissa Christine (Smith)	Maroon	1165	Y	Y	F	Descendant of Frank C Jones	
17	Michael E Jones		1	Y	Y	F	Descendant of Frank C Jones	
18	Ruth Eleanor O'Hannon		417	N	Y	?	Spouse of Descendant of Frank C Jones	
19								
20								

Figure 6. Excel Output

Column A contains the full name of descendants and non-descendant in Frank's line. The entry in cell A2 is included, even though, deceased) because spouses of descendants were retrieved. Column B was inserted into the spread sheet to hold the surname. Column B is filled either by adding the married name of the female spouse or by moving the Surname of a male entry from Column A. Column A is modified to show the maiden name of female entries by including her surname in parentheses.

We will return to Column G later. Column J contains the name of the ancestor for all the descendants. This name will be used to construct the third line of the name tag.

Before we describe the contents of Column G we need to learn a little about two functions of Excel: IF and CONCATENATE.

The 'IF' function is made up of three arguments. The first argument is an expression to test, the second is an output if the expression is true, and the third is an output if the expression is false. The arguments are separated by commas. The cells in Column F are the arguments to test. The values in Column F are the flag values from DESC_FAM. In this case the '?' indicates the person is not a direct descendant and the F indicates the person is a direct descendant of Frank. The second argument of the 'IF' function makes use of the CONCATENATE function; it adds two phrases together, "Spouse of " and the phrase that is in cell J2, "Descendant of Frank C. Jones"; the third argument of the 'IF' function uses the phrase in cell J2 as it is. So if we put all of these elements into one formula, it looks like this. Note that an = sign precedes each computation in Excel.

```
=IF(F2="?", CONCATENATE("Spouse of ", $J$2), $J$2)
```

For the person in row 2, the expression to test is F2="?". The answer is true.

And that equates to "Spouse of Descendant of Frank C Jones"; it appears in cell G2 rather than the formula. The reason for the \$ before each element of the cell ID \$J\$2 is to keep it static as the formula is copied from cell G2 to the last entry in cell (G19 in the total report). As we copy the formula down Column G, the cell number being tested in Column F changes from F2 to F3 to F4 all the way to the bottom of the list. In Row 7 the formula would look like this:

```
=IF(F7="?", CONCATENATE("Spouse of ", $J$2), $J$2)
```

To complete our edit we copy the formula in G2 into each cell down to the last entry. Then we complete the filling of Column B with the surnames and parenthesizing the maiden names in Column A as described above.

Note: Frank and his wife Anna are the main focus of the reunion along with Frank's brother Harry and his wife. (The mailing list to descendants of Harry will be developed later in the preparation process.) They are spiritually present, so a member of the family made the 'yes' RSVP for Frank. Anna is included because she is a spouse.

The elements we need for name tags are in Column A, B, and G, that is, the name tag's First name in line 1, Surname in line 2 and Relationship in line 3. An example follows in *Figure 6a. Name Tag Examples*. The name tags use the same size labels as the address labels.

Cathy (Apple)	Daniel Christopher
Jones	Maroon
Spouse of Descendant of Frank C	Spouse of Descendant of Frank C
Jones	Jones

Figure 6a. Name Tag Examples

Reports

A gathering of family members presents an opportunity to obtain missing information. Generate individual narrative reports with ample space to allow participants to fill in the missing blanks. For each adult attendee make Individual Narrative Reports for that person and their parents. Ask them to fill in the missing data. Bob said that people enjoy the challenge of supplying missing data on the spot, but they do not like to read a lot of background information.

To obtain blank lines in the report for missing information, start with Report>Individual Narrative>Options...>Miscellaneous>. Check the box 'Blanks for missing data'. Review all the options, if no more than to see what is available. Use large fonts, not everyone will have their reading glasses handy. One of the members in the audience suggested adding a footer to allow the informant to give their name, date and e-mail address. Bob's approach was to use this new information as a lead that will be examined to find the original source. Bob didn't include the sources of the information with the narrative reports. Only a few people will be interested in those details and if they express an interest, the information can be sent later.

On the day of the reunion, Bob takes pictures (head and shoulders) of participants as they arrive, and logs the number of the photo against their names on a report generated beforehand of persons who replied yes to the invitation. Bob did mention that he brings a printer to his reunions.

When the reunion covers more than one day, overnight Bob places the pictures on a large descendant box chart. Bob said that people interested in the same thing tend to go off together, and only get together as a group at dinner at night. As a game for the kids, he has them find their name on the descendant chart and sign their name. Another attendee has found that a game like a scavenger hunt gets the children to mingle. By the time the hunt is over the ice is broken and the kids have found new friends and met their older relatives. Bob makes a quiz for children who try to find the answers by looking at the name tags or asking questions. This encourages mixing since people now have several ready-made topics to start a conversation. The adults might favor a quiz show panel format where whoever can answer the most questions gets a door prize. Questions are made, such as, who lives in Florida, who has been married over 50 years, or who has a middle name of Andrew. Questions are tailored based on the participants attending.

Family Group Sheets

Family Group sheets can also be used to collect missing information. Use bold print for surnames and large fonts. Of course, include children and spouses.

Kinship reports can be useful for direct descendents. In Bob's opinion reports that are long, like journal reports, are not well received, and generate no useful information. Also the Relationship Chart between cousins, Ahnentafels, and ancestor box charts were not useful.

Miscellany from Bob Velke's Presentation

The topics below do not directly relate to preparing Reunion Reports; however, they were part of the same presentation.

Audit

There is no special reason to execute an audit report for family reunion purposes but it is a matter of routine to check the data for obvious errors. In the case that Bob illustrated, a birth discrepancy was highlighted where the birth date was entered with the wrong century. In another case, Bob cited a death event after the death date. In this case, Bob could not tell which was correct, and until that determination is made both were to be kept. If you haven't conducted an audit of your database, it's time to do so. An additional check for distribution of people might yield other insights in outlying values.

Accents

As a reminder, Bob color codes the ancestor flag. TMGv8 provides for colors on the tags. Bob used a case of clergy designated with one color and military experience a second color. What would happen if a person were both a veteran and a member of the clergy? Third color is now given as shown in the following figure.

The Accent Definition dialog box contains the following table of conditions:

Field	Operator	Value	Sample
CLERGY#1	=	Y	John Doe
VETERAN#1	=	Y	John Doe

The 'Selected Accent Condition' is currently set to 'CLERGY#1'.

Bob made the point about entering data in a query. He used state as an example. To obtain results one must use the state as entered in the database; if the state data is stored as VA, a query using Virginia would fail. Bob suggested querying using the "pipe" character, the straight vertical line, which appears uppercase above the enter key on keyboards. For example, a query would be state = VA|VIRGINIA. The input is not case sensitive.

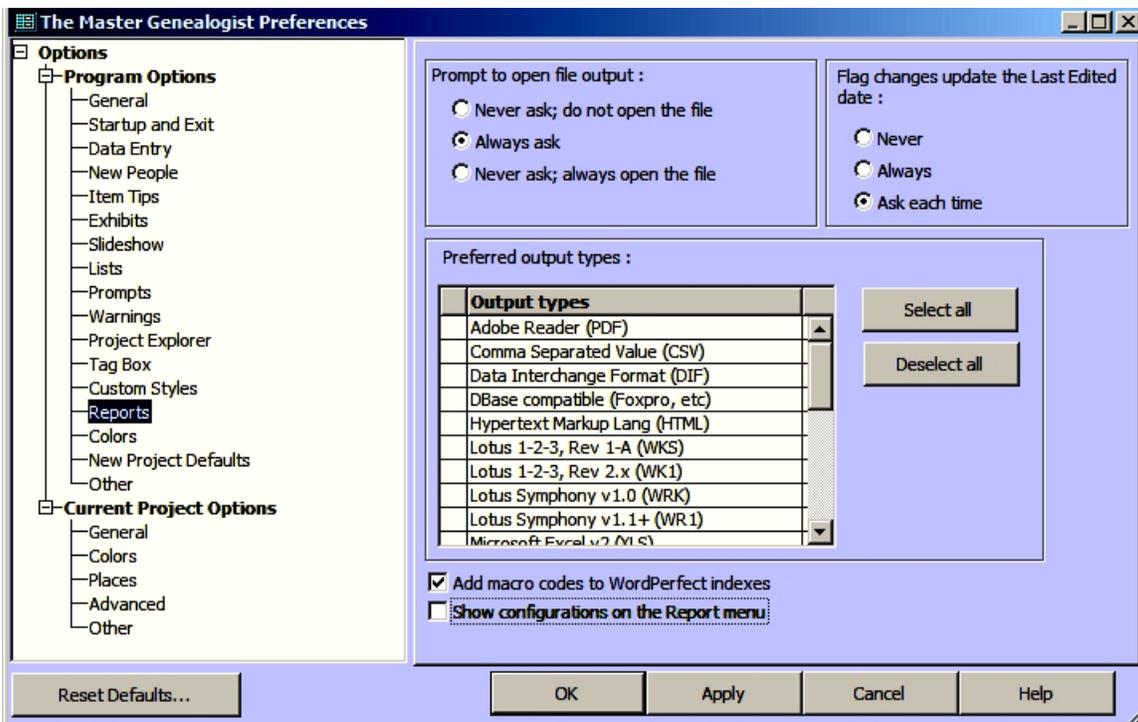
Bob also mentioned that one can't add new conditions on a query responding to a [?].

The Research Journal deserves attention. It is useful in citing not only what needs to be researched, but also what was accomplished, which was not necessarily a success. A full treatment of this area needs further consideration. For now note that upon entering the screen, the focus person is carried over to the screen.

Notice that in TMGv8 the drop down menu Report>List of ... >Events creates a selection in the drop down menu labeled Address List in addition to List of Events. So Address List appears both in the box associated with Configuration name and the drop down menu. This feature is new in TMGv8 and is not available in TMGv7.

If you find this feature annoying or confusing, Bob showed the group how to turn this feature off.

At the Menu bar, select File>Preferences>Reports (under "Program Options"); a screen appears on the right. Now on the very last entry at the bottom of the screen, uncheck the box labeled "Show configurations on the Report menu" as shown in the following figure.



This will cause TMGv8 to suppress the extra reports list in the drop down menus. With the box unchecked, TMGv8 acts like TMGv7 for this feature. Turn this feature on or off to suit your preferences.