

Transferring from UFT to TMG5

by Paul Lawrence



An article I wrote on transferring data from UFT (Ultimate Family Tree) to TMG (The Master Genealogist, developed by WhollyGenes Software) appeared in the September 2000 issue of the *RUG Newsletter*. That article dealt with transferring UFT data to TMG version 4a. I have updated that article in regards to TMG version 5 to assist those UFT users who may be considering transferring to the current version of TMG.

The only method available to transfer data to the majority of the existing genealogy programs is through the use of GEDCOM. Unfortunately using GEDCOM to transfer UFT data may result in the lost of data that does not fit into the GEDCOM format. TMG is a program that is similar in concept to UFT and provides a direct transfer of UFT data via their GenBridge technology. In 2000 WhollyGenes prepared a document that compared what data is transferred to TMG version 4 using GEDCOM versus what data is transferred using the GenBridge technology. The document also indicates where the transferred UFT data can be located in TMG once the transferred is made. This document is still relevant to transferring UFT data to TMG version 5. An Excel version or PDF version of this document is available for downloading at the WhollyGenes web site at <http://www.whollygenes.com/downloads.htm>.

You should plan on importing your data several times and examining the results. You may find it easier to make any necessary changes to your data in UFT since you are more familiar with the program. Depending on the size of your database you may want to import just a representative subset of your data to become familiar with TMG and the import process. Even after your final importation of UFT data there probably will be things that you will need to edit in TMG. The amount of editing required will vary from user to user and depends on how you made use of some of UFT's features.

Although there are similarities between UFT and TMG, there are terminology differences, structural differences, and operational differences. For example, in UFT you have Events plus additional data that is entered under the More button on the Individual Record window. In TMG, basically all data is entered through "Tags". An event is a Tag. Data that were contained in the More section in UFT, such as Common Name, Alias, Social Security Number, etc., are imported as Tags. UFT has individual projects. TMG version 5 also has individual projects but each project can consist of multiple data sets were a single data set equates to a single UFT project.

Preparing Your UFT Project for GenBridge Import Into TMG

There are a few things that you can do in UFT and TMG to prepare for an import. First, TMG version 5 does not support GIF image format and they will not be imported. If you have GIF images in UFT you may want to change them to another format such as JPG prior to import.

Second, if you have used a "old style date" format such as 4 January 1456/57 in UFT for dates prior to 1583 you will want to make a change in TMG Preferences>Program Options>General. The default date range for "old style dates" in TMG is 1583 to 1752. You will want to change the lower end of that range to a year earlier enough to cover any dates you may have entered in the above format. I changed mine to 100 to be safe. If you don't make that change in Preferences then dates like the above will be imported as between dates such as "between 4 January 1456 and 1457."

Third, if you have used long free form dates in UFT they may be truncated in TMG. TMG does not have a separate free form date field as UFT does but dates that do not conform to a normal date format can be entered as “irregular dates.” However, the length of the date field (29 characters) in TMG is shorter than the free form date field in UFT and your free form dates may be truncated. A list report summarizing the result of the import is created by TMG and will identify those dates that are truncated. You can use that report to locate those dates either in TMG or back in UFT, make appropriate adjustments, and then import your data again.

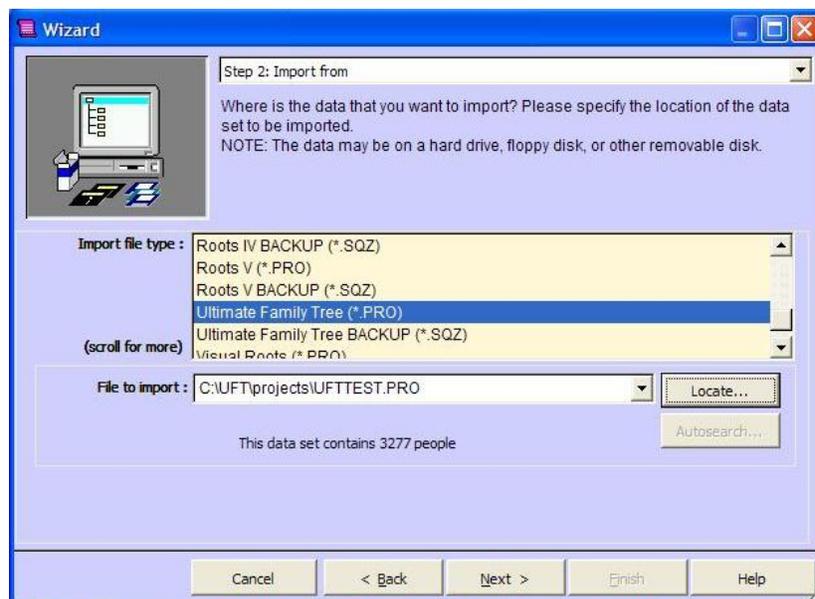
You can import your data directly from a UFT project or from a backup (.sqz file) of your UFT project. If you are importing from a backup, then that backup must contain all of your library and multimedia files as well as your project files. TMG cannot import from one backup containing your project and another backup containing your library. Importing from a backup also will take longer and use more temporary disk space as TMG has to expand the backup into a temporary directory prior to beginning the import process. Unless you have a good reason for importing from a backup, I would import directly from your UFT project.

Beginning the Import Process Using the Import Wizard

To begin the import process click on the Import button in the Welcome window or, if you have a TMG project open select File>Import from the Menu Bar. You will be presented with the Import Wizard at **Step 1: Welcome**. You have two choices, Simple Wizard or Advanced Wizard. I suggest that you select the Advanced Wizard in order to step through all of the options available in importing UFT data. In most cases the default settings for UFT import will suffice but there are a few minor changes to the defaults that you may wish to make. Click the **Next** button to go to Step 2.

In **Step 2: Import from**, you select the source of your import. Scroll down to the near the bottom of the “Import file type:” list and select the source of your import. Users of UFT and some of its predecessor products can select from Roots IV, Roots V, Ultimate Family Tree, and Visual Roots

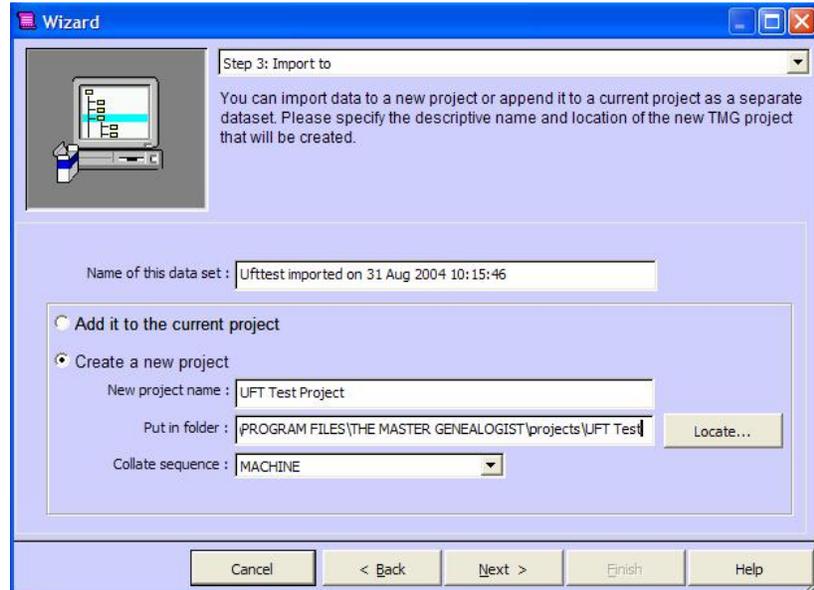
either the .PRO file of the .SQZ file. Once you have selected the type of file you wish to import you need to identify the specific file you wish to import. You can click on Autosearch to automatically search your system for all files of the specific type or click on Locate and navigate to the proper folder and select the correct file for import. I prefer to do the latter as to sit and wait for the search routine to search all active drives on the system. If you use the Autosearch the drop down “File to Import:” list is used



to select the file from those found. Click **Next** to go to the next step. (Note: At any time you can click on **Cancel** to cancel the import process or click on **Finish** to skip the remaining steps and jump immediately to the last step to begin the import. You can also click on the **Back** button to return to the previous step and make adjustments if necessary.)

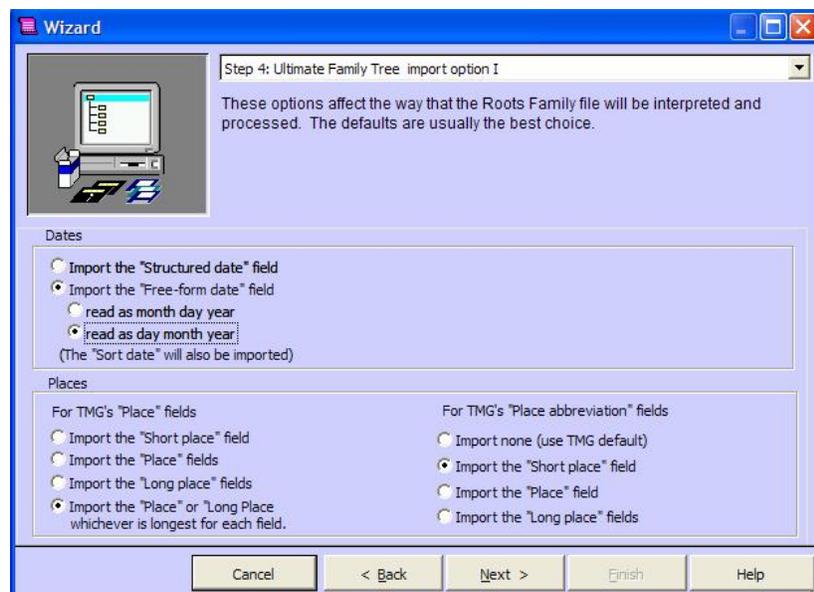
In **Step 3: Import to**, you identify the destination of your import. The default “Name of this data set:” is the file name of the data set being imported along with the date and time of the import.

You may override this default by erasing and entering whatever name you wish to identify the data set. This name is used to identify the data set in the list of data sets with in the Data Set Manager in TMG. If you have initiated the import process from within an open TMG Project you will see two selections under the “Name of this data set:” field, “Add it to the current project” and “Create a new project”.



If you initiated the import process from the Welcome window meaning that there is no open TMG Project you will not see these two options as the only option is to create a new project. If you want to import you data set as a separate data set into the current open project in TMG select “Add it to the current project,” To create a new separate project select “Create a new project.” If you select the latter then the “New project name:”, “Put in folder:”, and “Collate sequence:” fields will be activated. Enter the name for the new project that will be used as the file name for the project. TMG has a default projects folder which can be changed under Preferences>Program Options>General, Default Project Path. I suggest leaving this set to the default projects folder but also recommend that you create subfolders for each of your projects within this default projects folder. To create a new subfolder type the name of the subfolder at the end of the path indicated in the “Put in folder:” line and tab out of the field. If the subfolder does not exist you will be asked if you wish to create a new folder, click **Yes**. For most users the “Collate sequence” does not need to be changed. Click **Next** to go to the next step.

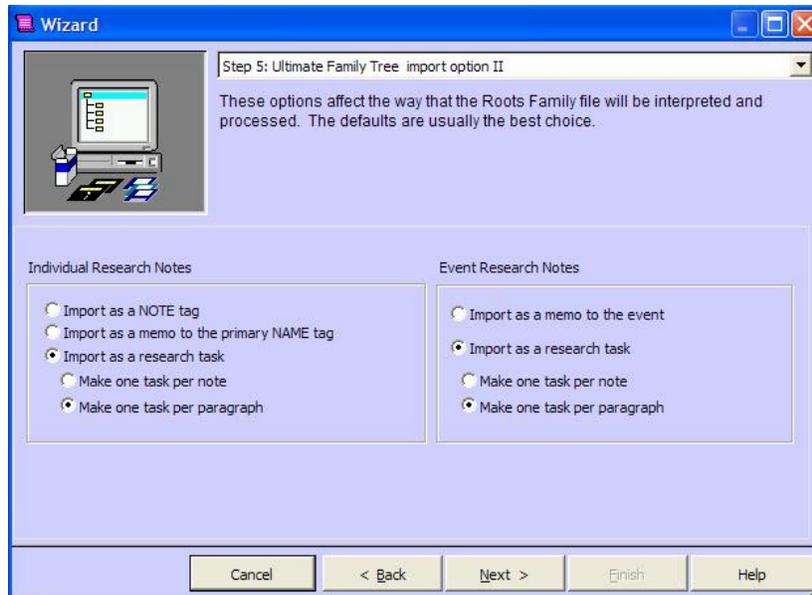
In **Step 4: Ultimate Family Tree import option I**, you make selections concerning the importation of dates and places. You can import the “Structure date” field or the “Free-form date” field. You will probably want to



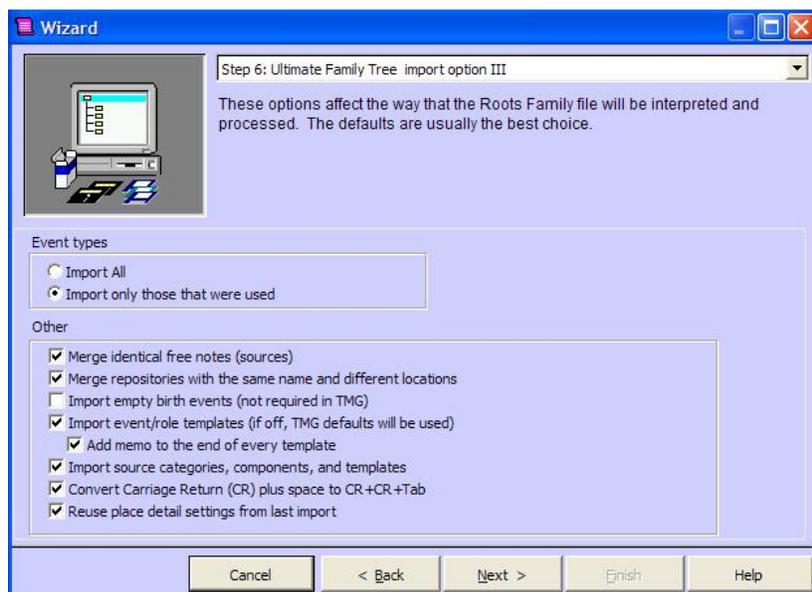
import the “Free-form date” field unless you have not made use this capability in UFT. If selected you need to indicated whether the date in the “Free-form date” field should be read as “month day

year” or “day month year”. Note that the Sort date also will be imported and will be placed in a similar Sort date field within TMG. For Places the default settings are probably sufficient. By default, TMG will import the “Place” or the “Long Place” fields whichever is the longest. TMG will also import the “Short Place” field by default. TMG has a setting in Preferences>Program Options>New Project Defaults, Short place template: which identifies which place fields are to be used when “Short Place” is selected for reports. This template is overridden by the contents of the Short Place field in the Master Place List, the location where the UFT Short Place is placed upon import. Click **Next** to go to the next step.

In **Step 5: Ultimate Family Tree import option II**, you select how your “Individual Research Notes” and “Event Research Notes” are to be imported. For Individual Research Notes, you can choose to have them import as a separate “Note tag,” import as “a memo to the primary Name tag,” or import as “a research task.” If you select “research task” you indicate whether to make one task per note or one task per paragraph. For Event Research Notes, you can choose to have them import as “a memo to the event,” or “import as a research task.” If “research task” is selected, you again indicate whether to make one task per note or one task per paragraph. Click **Next** to go to the Next step.



In **Step 6: Ultimate Family Tree import option III**, you make decisions concerning the importation of Event types and other miscellaneous items. The default settings are probably sufficient. You can import all of the event types in UFT or only those that you have used in the project being imported. If you wish to have all of the event types defined in UFT available you should change the default selection to “Import All.” Keep in mind that TMG probably has similar tag types that correspond to the UFT event types so “Import All” is probably not necessary. Those event types that are imported are matched to corresponding TMG tag types automatically where possible, i.e., birth to birth, death to death, marriage to marriage, etc. You also



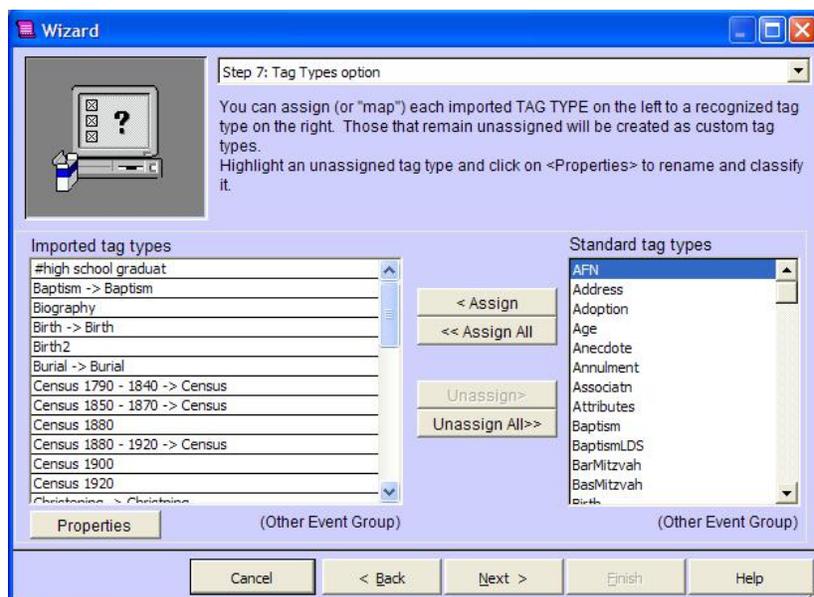
have the option in the next step to match imported UFT event types to existing TMG tag types if desired or import them as completely new custom tag types for TMG.

Under Other, there are several decisions to be made.

1. **Merge identical free notes (sources).** Free notes from UFT are created as sources in TMG. Selecting this option will merge those free notes from UFT that are identical into one source rather than having a source for each one. Default is checked.
2. **Merge repositories with the same name and different locations.** This merges repositories with the same name into one repository record rather than multiple repository records. Default is checked. Note that if you have many repository fields such as “County Clerk” in various locations, you would be wise to uncheck this item.
3. **Import empty birth events (not required in TMG).** Unlike UFT, TMG does not require that a birth event be present. Default is unchecked. Unless you have some need to see a blank birth event, I would leave this selection unchecked.
4. **Import event/role templates (if off, TMG defaults will be used).** You should check this option to import your event/role templates as they appear in UFT. Default is checked. You also probably want to check to **Add memo at the end of each template.** Default is checked. Event text fields are imported as memo fields in the event tag in TMG. To ensure that they print after the event sentence as they do in UFT, you will need to check this item to add the Memo variable [M] to the end of the template sentence.
5. **Import source categories, components, and templates.** Checked by default. If you uncheck this option then TMG defaults will be used. I recommend leaving this checked and at a latter clean up time convert the imported UFT sources to a TMG source.
6. **Convert Carriage Return (CR) plus space to CR+CR+Tab.** In UFT a return plus a space was used to space between and indent paragraphs. Checking this converts these to codes to cause the same spacing in TMG. You will probably need to take a look at some of your longer text entries of multiple paragraphs to ensure that the formatting is as you desire. TMG uses codes for Carriage returns [:CR:] and Tabs [:TAB:] that can be inserted for formatting. Default setting is checked.
7. **Reuse place detail settings from last import.** If checked subsequent imports will use the same settings as previously used for the place detail settings (discussed below.) Default is checked.

Click **Next** to go to the next step.

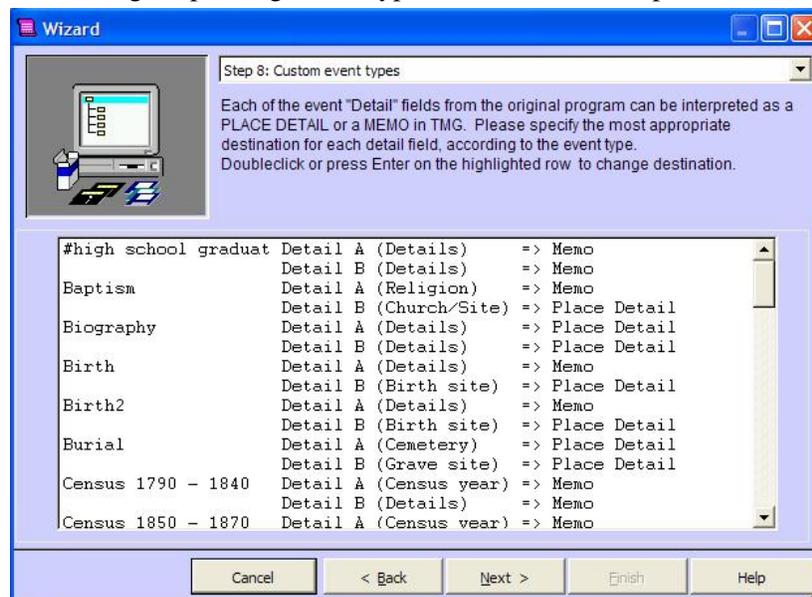
In **Step 7: Tag Types option**, you can assign UFT event types to a TMG tag type. Most are assigned automatically to a corresponding TMG tag type. For example, UFT Birth is assigned to TMG Birth, UFT Birth2 is assigned to TMG Birth, UFT Death is assigned to TMG Death, etc. UFT event types that are not assigned to TMG tag types will be created as custom tag types in TMG. For example, UFT Birth2 event type is not assigned to a TMG



tag type and will be created as a custom tag retaining the UFT sentence templates for the roles assigned to that tag. You also will see a Biography tag in the list. This is a custom tag that is created to contain the Individual Text for individuals in UFT. To assign a UFT event type to a TMG tag type highlight the unassigned event in the Imported tag types list and highlight the TMG tag type in the Standard tag types list and click Assign. Likewise you can unassign a UFT event type by highlighting it in the Imported tag types list and clicking Unassign. When you highlight an event in the Imported tag types list or in the Standard tag types the Tag Group that the event or tag has been assigned is shown at the bottom of the list. If you need to change the Tag Group that has been assigned to the Imported tag types click on Properties. Only unassigned Imported tag types can have their group changed. Also, when assigning an Imported tag type to a Standard tag type it must be assigned to a Standard tag type in the same group. The default settings in this step usually are sufficient and do not need to be changed. Click **Next** to go to the next step.

In Step 8: Custom event types. Events in UFT have two detail fields, Detail A and Detail B. These detail fields have different meanings depending on the type of event. When imported into

TMG, they will be placed in either the Place Detail field or in the Memo field. In some cases, such as the cemetery in a burial event, the detail field is appropriate for the TMG Place Detail field. In other cases, such as the occupation and organization fields of an employment event, it is more appropriate to place them in the memo field. It is possible to end up with two separate items in a Place Detail field of TMG and multiple items in the memo field of an event tag when you consider that there also may be event text. These multiple items are separated by two pipe symbols (||) and can be individually selected in the sentence structure by [Detail1] and [Detail2] variables, and [M1], [M2], [M3] variables respectively where [Detail1] and [M1] variables correspond to the UFT Detail A field, [Detail2] and [M2] variables correspond to the UFT Detail B field, and [M3] corresponds to the UFT event text. If the UFT Event did not make use of the Detail A or Detail B fields then the event text is place in the Memo field and represented by [M] in the sentence template. The imported UFT sentence templates are adjusted to reflect the proper variables according to the settings in this step. During clean up in TMG never remove the pipe symbols (||) unless you have full understanding of the sentence structure and have made any adjustments to the variables contain within to reflect the removal of the pipes. The default settings in this step are probably sufficient and do not need to be changed. Click on **Next** to go to the final step.



TMG and multiple items in the memo field of an event tag when you consider that there also may be event text. These multiple items are separated by two pipe symbols (||) and can be individually selected in the sentence structure by [Detail1] and [Detail2] variables, and [M1], [M2], [M3] variables respectively where [Detail1] and [M1] variables correspond to the UFT Detail A field, [Detail2] and [M2] variables correspond to the UFT Detail B field, and [M3] corresponds to the UFT event text. If the UFT Event did not make use of the Detail A or Detail B fields then the event text is place in the Memo field and represented by [M] in the sentence template. The imported UFT sentence templates are adjusted to reflect the proper variables according to the settings in this step. During clean up in TMG never remove the pipe symbols (||) unless you have full understanding of the sentence structure and have made any adjustments to the variables contain within to reflect the removal of the pipes. The default settings in this step are probably sufficient and do not need to be changed. Click on **Next** to go to the final step.

Step 9: Finish. At this point you will begin the import. If you have initiated the import from the Welcome window the only action in this step is to click Finish to begin the import process. If you initiated the import from the Menu selection File>Import from within an open TMG project then you must choose one of the following from the drop down list at the bottom of this window.

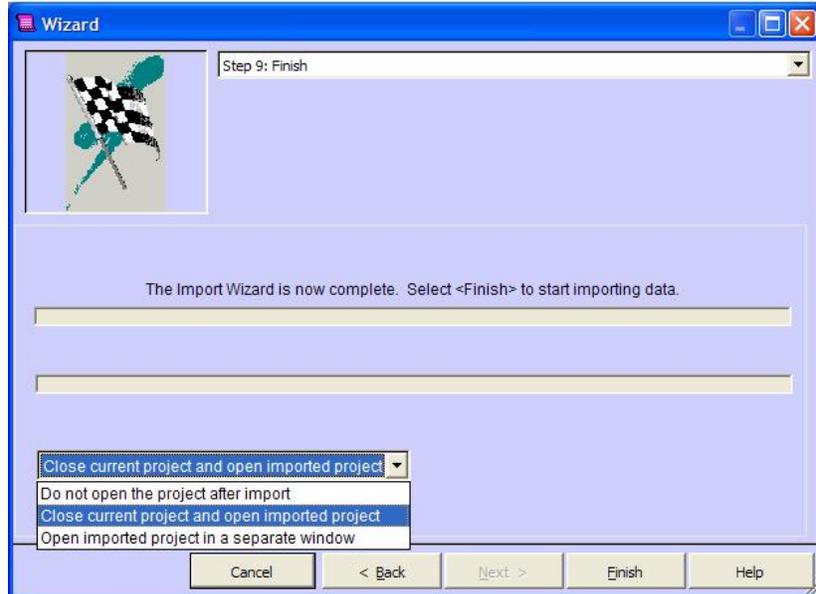
Do not open the project after import – the project will not be opened after import.

Close current project and open imported project – the current open project will be closed and the imported project opened.

Open the imported project in a separate window – the imported project will be opened in a separate window or separate instance of TMG version 5. You can have multiple copies of TMG version 5 opened at any time unlike UFT or TMG version 4, and the multiple instances of TMG can even have the same project open.

After selecting on of the above click **Finish** to begin the import process.

The time it takes to import your database will vary depending on the size of your database particularly the number of individuals and number of events, and the speed and resources of your computer. My database of over 32,000 names took approximately one and one-half hours to import on a Pentium IV 1.7 Ghz, 512MB of memory.



After the Import Process Is Completed

At the end of the import process, you are asked if you want to view the list file that shows any problems or comments on the import process. Click on Yes to view the list. If you wish to print the file, locate the file using Windows Explorer. It will be named with the project name you assigned in Step 3 with a .lst extension and is located in the project subfolder you selected at import. Double click on it to open it in Notepad. This list will indicate any problems that were found in the import process, show an import/conversion summary indicating where some of the data types were imported into TMG, indicate which UFT files were used in the conversion process, how long the import took, and what options were used in the import process.

After opening the import list or responding No to opening the list, if you have chosen not to open the project in the final step of the import you will be returned to the previously opened project and the following actions will take place when you first open the imported project. Otherwise, TMG prepares to open the project and you are asked if you wish to have thumbnails created for your images. If you have a lot of images, thumbnails will speed up the processing of the Exhibit Log in TMG. If thumbnails are not created each time you open the Exhibit Log TMG has to create a thumbnail to display the image. The downside is that this increases the size of your backup as the thumbnails are part of the project data. You can turn the thumbnail feature on or off under Preferences>Project Options>Advanced but checking or unchecking “Save image thumbnails.” After responding to the thumbnail message, there will be a slight delay as TMG initializes files and builds various indices for the dataset. You will then be asked if you wish this data set to be Locked or Unlocked. You will want to select Unlocked as you cannot edit or make additions to a Locked data set.

You should examine your imported data thoroughly to determine any problems you may have with the way the data was imported. You may want to go back to UFT and make changes or corrections and rerun the import or rerun the import with different option settings. I would not do any massive editing or additions to your dataset until you feel comfortable with the way your data was imported.

Recommended TMG Sources

There are several sources that can be utilized to assist you in learning TMG. You may want to review some of these before you do your final import.

- **TMG-L mailing list on Rootsweb** – this list is a user to user help list. To subscribe to TMG-L in the MAIL mode, send a message to <TMG-L-request@rootsweb.com> (to <TMG-D-request@rootsweb.com> for the Digest mode) with just the word "subscribe" (no quotes) in the text and turn off your signature.
- **TMG Tips** – Tips and suggestions submitted by several experience users can be found at <http://www.tmgtips.com/> . The web page is maintained by Lee Hoffman.
- **Terry's TMG Tips** – Web page of tips at <http://tmg.reigelridge.com/>
- **WhollyGenes Community** – Quoting WhollyGenes' description of this site in their 29 August 2004 Newsletter: "This extensive site is the new home for all of the important TMG resources, including Frequently Asked Questions (FAQ's), users groups, sample reports, TMG-related web sites, Tips & Hints and much more. The new discussion forums make it easy to get your questions answered directly from Wholly Genes technical support and experienced users. With the help of a powerful search feature, the message board also serves as a valuable knowledgebase of previous questions and answers - so it is a great place to start when you have a question that is not covered in the Users Guide or Help file." Located at <http://www.whollygenes.com/forums/> .
- **"Getting the Most Out of The Master Genealogist"** – Compiled by Lee Hoffman this book contains chapters for various TMG subjects that have written by experienced TMG Users. The book can be purchased at <http://www.whollygenes.com/gettingthemost.htm> .
- **Video training tapes for TMG** – Getting Started, Intermediate, or Advanced. The tapes can be purchased at <http://www.whollygenes.com/videotapes.htm> .

These are just a few of the resources available in addition to the on-line Help within TMG and the Reference Manual provided with the project. You also should visit John Cardinal's site for additional tools that can assist you in your use of TMG. His site is located at <http://www.johncardinal.com/> .