

## FAVORITE FILTERS

By Janis Parkison Rodriguez  
for Arlington RUG meeting 13 May 2006, rev. 3

Thanks to all who submitted their Favorite Filters, unfortunately, only a few people responded.<sup>1</sup> Below are a combination of submitted filters, filters gleaned from the TMG-List, and my favorites and modifications to the above. Understandably, many favorites use [?], for its repeat value. While not a “filter” the Output Columns on the Options screen are critical to the effective use of all filters so I’ll touch on them, too. Experiment with both your filter conditions and your output. If you can’t find a heading for the info you want to display in the output columns, try another type of report like the List of Events.

### 1. LIST OF PEOPLE FILTERS (PE & Picklist, too)

These filters can be created when in any of these three locations. You can “Save As” and then reuse them by “Load” ing the filter for an LOP, the PE or the Picklist. The filters are saved in the Project folder, either the one you have specified in Preferences or the Project folder under the TMG Program Files. Thus, you can instantly test an LOP filter in the PE or Picklist and tweak it until you have everyone you are looking for before Saving it for future use.

**1.1. People with Certain Names** – You can search any name field a couple of ways. Remember, to get to some name fields, you must scroll up since the default filter opens at Surname.

Field	Subfield	Operator	Value	Connect
Name Group	Surname	Contains	[?]	END

#### 1.1.1. People with a Certain Middle Name

*Paul E. Lawrence*

Field	Subfield	Operator	Value	Connect
GivenName		Contains	[?]	AND
GivenName		Does not begin with	[?]	END

**1.2. Searching for any person with an event in a certain place** – handy for research trips. Recommend using “Contains” to pick up all references in case field includes Co., County, Township, etc. Use Place field if data entry may not be consistent or imported inconsistently.

*Jill Morelli*

Field	Subfield	Operator	Value	Connect
Any event	Place	Contains	[?]	END

Include the following *Output Columns*, sorting Name first:

- ID #
- Name Group\* tag; Last, Given Names
- Spouse’s Name Group\* tag; Last Given Names
- Birth Group\* tag; Date
- Marriage Group\* tag; Date
- Death Group\* tag; Date
- Death Group; Place

NOTE: Make columns wide enough not to truncate data and then “Print & Save” to a Spreadsheet. Adjust columns as desired in spreadsheet and wrap text to show all the data.

**1.2.1.** Similar filter - Anyone with events, including witnessed events, in a certain County – handy for research trips to a specific county. Include Witnessed events to pick up everyone. See LOE version below. Use them together: run LOP to filter the PE for the people and run the LOE to identify the specific events you have.

*Janis Rodriguez*

Field	Subfield	Operator	Value	Connect
Any event	County	Contains	[?]	OR
Witnessed event	County	Contains	[?]	END

Output columns: Add Place for Birth and Marriage Groups to above columns.

<sup>1</sup> Attribution is given for filters people submitted in response to my requests or filters from the TMG-List. I apologize if I missed anyone. There are many ways to filter and many threads....

### 1.2.2. People with same Surname in a certain Place

*Lorna Henderson*

Field	Subfield	Operator	Value	Connect
Surname		Contains	[?]	AND
( Any event	Place	Contains	[?]	OR
Witnessed event	Place	Contains	[?]	END

### 1.3. People with Exhibits – Include tag type or not, as desired.

Field	Subfield	Operator	Value	Connect
# of Exhibits		> Greater than	0	END
<i>OR</i> by a specific tag				
CENSUS 1880	# of Exhibits	> Greater than	0	END

### 1.4. Memo contains [?]

*Kathryn Bassett*

Field	Subfield	Operator	Value	Connect
Any event	Memo	Contains	[?]	END

### 1.5. Identify Direct Ancestors of a specific person

*Janis Rodriguez*

Field	Subfield	Operator	Value	Connect
Is an Ancestor		of ID#	[?]	END

### 1.6. Identify End of Line Ancestors of a specific person

Field	Subfield	Operator	Value	Connect
Is an Ancestor		of ID#	[?]	AND
Father*		Is Not Known		AND
Mother*		Is Not Known		END

### 1.7. Unattached people

*David Ball*

Field	Subfield	Operator	Value	Connect
# of Children		= Equals	0	AND
# of Spouses		= Equals	0	AND
Father*		Is not known		AND
Mother*		Is not known		END

### 1.8. People with Incomplete Tasks

Field	Subfield	Operator	Value	Connect
# of Incomplete Tasks		> Greater than	0	END

### 1.9. Missing Marriages

*David Ball*

Field	Subfield	Operator	Value	Connect
# of Children		> Is greater than	0	AND
# of Marriage Group tags		= Equals	0	END

### 1.10. Multiple Births or Deaths

*David Ball*

Field	Subfield	Operator	Value	Connect
# of Birth Group tags		> Is greater than	1	OR
# of Death Group tags		> Is greater than	1	END

**1.11. Spousal Spouses** – Locates people with multiple marriages.

*David Ball*

Field	Subfield	Operator	Value	Connect
Dataset ID		= Equals	[?]	AND
Is not a Descendant		of ID#	[?]	AND
# of Marriage Group tags		> Is greater than	1	END

**1.12. People of a certain Surname born around a certain date**

Field	Subfield	Operator	Value	Connect
Surname		Contains	[?]	AND
Birth Group	Year	Is within 10 years of	[?]	END

**1.13. Men who might have registered for WWI draft** - for the ancestry.com database. Can be modified for the soon to be released WWII draft registration database!

*Janis Rodriguez & David Ball & Jim Byram*

Field	Subfield	Operator	Value	Connect
Sex		= Equals	M	AND
Birth Group	Date	> Comes after	10 Sep 1872	AND
Birth Group	Date	< Comes before	13 Sep 1900	AND
( Death Group	Date	> Comes after	5 Jun 1917	OR
Death Group	Date	Is empty		OR
Death Group	Date	Is irregular		OR
Death Group	# of tags	= Equals	0 )	END

**1.14. Census Candidates** – This filter catches many candidates. Change the years based on the census/event for which you are identifying candidates. Can adapt to any census/event.

*Janis Rodriguez*

Field	Subfield	Operator	Value	Connect
( Death Group...	# Tags	= Equals	0	OR
Death Group...	Date	≥ Does not come before	1880 )	AND
( Birth Group...	Date	< Comes before	1881	OR
Birth Group...	# Tags	= Equals	0 )	AND
Any Event	Date	> Comes after	1795	AND
Any Event	Date	< Comes before	1985	AND
( CENSUS 1880	# Tags	= Equals	0	AND
Witnessed CENSUS 1880	# Tags	= Equals	0 )	END

HOWEVER, I agree with Bob Gillis' comment that Census Candidates can be more accurately identified using a combination of Flags. See more comprehensive Flag solution, later.

**1.15. People with certain Roles** – Tip: use both the regular tag and witnessed tag if the roles could be for a Principal or a witness.

*Janis Rodriguez*

Field	Subfield	Operator	Value	Connect
Property	Role	= Equals	Grantee	OR
Witnessed Property	Role	= Equals	Grantee	END

**1.16. Search for people Last Edited after a certain date.** NOTE: requires a full date.

Field	Subfield	Operator	Value	Connect
Last Edited Date		> Comes After	[?]	END

This can also be limited to Ancestors or Descendants of a common ancestor:

Jim Byram

Field	Subfield	Operator	Value	Connect
Last Edited Date		> Comes After	[?]	AND
Is an Ancestor or Descendant		of ID#	[?]	END

Add the Last Edited date as an Output Column in the Options Window and place a 1 in the sort column so Report sorts by that date.

**1.17. Irregular Dates LOP** – negative for LOP, only lists people, not the event

Myrnice Roberts

Field	Subfield	Operator	Value	Connect
Any event	Date	Is irregular		END

**1.17.1. Irregular Dates LOE** – lists the events, but can't filter PE or create a Focus Group to work through.

Lee Hoffman

Field	Subfield	Operator	Value	Connect
Date		Is irregular		END

Output Columns: Tag Type Label; Date; Prin1 Last, Given; Prin1 ID

TIP: Use LOP to filter the PE and LOE so you know which event to fix. Sort both on ID # and you can easily find the “offending” events for each person.

**2. LIST OF EVENTS FILTERS**

**2.1. Events in Place LOE** – results in a timeline w/in place/county by ID – use w/ LOP

Lee Hoffman

Field	Subfield	Operator	Value	Connect
Place		Contains	[?]	END

Output Columns: Tag Type Label; Date (SORT 2); City; Prin1 Last, Given; Prin1 ID (SORT 1)

**2.2. Search memo fields for certain word or phrase.** Use List of ... Events report.

Bob Velke

Field	Subfield	Operator	Value	Connect
Memo		Contains	[?]	END

Output Columns: Prin1 Last, Given; Prin1 ID; Tag Type Label; Memo Increase the number of characters in the Memo column, send report to a spreadsheet then word wrap the memo column.

**2.2.1.** If this filter returns too many, and you know the tag type of the event you are looking for, **ADD** the Tag Type Label to the above filter:

Field	Subfield	Operator	Value	Connect
Tag Type ...	Label	Contains	Birth	END

**2.2.2.** Find all event tags with a citation embedded (or other codes) in the Memo

Field	Subfield	Operator	Value	Connect
Memo		Contains	[CIT:]	END

**2.3. Specific events types with no source citations** (Filter Request)

Bob Gillis

Field	Subfield	Operator	Value	Connect
Tag Type ...	Label	Contains	[?]	AND
Number of Citations		= Equals	0	END

- 2.4. Local Sentences** - Events where sentence is modified LOCALLY at the tag level. Use “Any Witness” to catch everyone because principals are a subset of witnesses. Unfortunately, this report does not indicate which sentence (principal, witnesses or role) is modified. Could run LOP for P1 and/or P2, but other witnesses would be missed. Output column for Principal and Witness sentences can be included but only prints default sentence structure.

Field	Subfield	Operator	Value	Connect
Any Witness	Sentence (local)	Is not empty	blank	END

- 2.5. Marriages not Primary** – This filter finds people whose marriage tag is not set to primary and consequently the marriage and people are missing from charts.

*Jon Reed*

Field	Subfield	Operator	Value	Connect
Tag Type...	Label	= Equals	MARRIAGE	AND
( Principal1...	Primary Marker is	Off		OR
Principal2...	Primary Marker is	Off		END

- 2.6. Tags with only Sort date**

*Janis Rodriguez*

Field	Subfield	Operator	Value	Connect
Date		Is empty		AND
Sort Date		Is not empty		END

### **3. LIST OF CITATIONS FILTERS**

- 3.1.** Citations associated with ID# - check Sources AND Citation Detail for a particular person. Does not print the full footnote. Does not catch citations attached to name tags.

*Peter R Thompson & Janis Rodriguez*

Field	Subfield	Operator	Value	Connect
Linked Event	Any Principal ID	= Equals	[?]	OR
Linked Event	Any Witness ID	= Equals	[?]	OR
Linked Relationship	Parent; ID Number	= Equals	[?]	OR
Linked Relationship	Child; ID Number	= Equals	[?]	END

- 3.2.** List of Citations – locate all citations to a specific source. Cannot change Output.

*Paul Lawrence & Terry Reigel*

Field	Subfield	Operator	Value	Connect
Source Number		= Equals	[?]	END

- 3.2.1.** List of Citations using LOE[vents] instead of LOC[itations]. In LOE you can't print [CD] or details about the source but you can vary column output and sort on designated columns. Adding Prin1 and Prin2 to output yields both principals' names.

*Jim Byram*

Field	Subfield	Operator	Value	Connect
Any Citation	Src Number	= Equals	[?]	END

- 3.3. CD field Contains**

Field	Subfield	Operator	Value	Connect
Citation Detail		Contains	[?]	AND

### **4. LIST OF WITNESS FILTERS**

- 4.1.** Locate all witnesses with certain Tag Type, *i.e.*, people with an Immigration tag.

Field	Subfield	Operator	Value	Connect
Tag type	Label	Contains	IMMIGR	END

## 5. LIST OF TAG TYPES FILTERS

### 5.1. Custom Tag Types

Field	Subfield	Operator	Value	Connect
Is custom		Yes		END

## 6. LIST OF TASKS FILTERS – Search for tasks which are incomplete, contain a certain keyword, or are linked to a particular repository.

### 6.1. Keyword Search

*Paul Lawrence*

Field	Subfield	Operator	Value	Connect
Keywords		Contains	[?]	END

### 6.2. Incomplete Tasks

Field	Subfield	Operator	Value	Connect
Completed date		Is empty		END

### 6.3. Linked Repository

*Teresa Ghee Elliott (I think)*

Field	Subfield	Operator	Value	Connect
Linked Repository	Repository ID	= Equals	[?]	END

## 7. LIST OF SOURCES FILTERS

### 7.1. Comments in Supplemental Tab not Empty (or Contains, etc)

*Jim Byram*

Field	Subfield	Operator	Value	Connect
Memo		Is not Empty		END

See “1880 Census Candidates Using Flags and Book Manager” for an updated  
version of the Census Candidates with Flags