

# Using Master Genealogist – Advanced

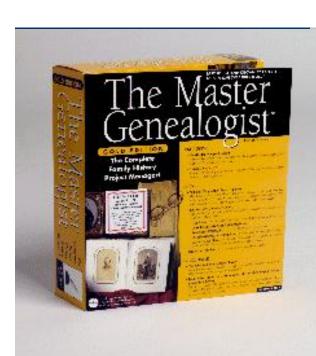
Teresa Pask Uridge, Euridge One-Name Study Pask, Paske One-Name Study

www.uridge.org, or www.pask.org.uk

uridge@one-name.org







# The Master Genealogist by Wholly Genes Software

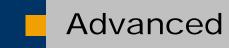
#### Introduction

**Advanced Features: Two Sessions** 

**Companion Products** 







#### **Advanced Features**

This course will significantly improve the ease of using the program and be very helpful in your understanding of TMG.

We will cover the more advanced concepts of:

- Data Set Manager, Accents, Focus Groups, Custom Flags, Advanced Report Options and designing report filters,
- Creating Sources and Repositories, Custom Roles, Witnesses, Sentence Structure, Source Templates, Citation output and **Exporting data.**
- In addition, companion products including Second Site, and TMG Utility.

#### Introduction

#### Release

■ TMG Release 7.00 (UK Version)
Released 30 December 2007

#### Hardware

- Windows 2000, XP, or Vista
- Pentium 166 with 64 Megs of RAM (256 recommended)
- A screen resolution of at least 1024x768 is strongly recommended.
- Web searching and chart uploading features require an Internet connection.

#### Personal Usage

- 2 x One-Name Studies 4,000+
- Basis for websites www.uridge.org www.pask.org.uk

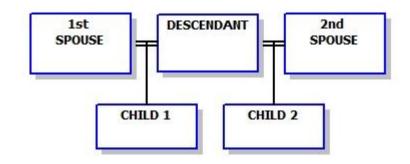
#### Other tools

- Second Site Version 2 generates web pages
- TMG Utility database modification tool for TMG
- Excel



#### TMG UK Version

- The "UK Edition" is a set of special UK-oriented customisations that are automatically applied to a standard installation of The Master Genealogist.
- English (U.K.) reflects UK spellings and phrases on the screens and menus.
- Five new UK-oriented timelines
- The internal spell checker supports 200+ additional UK spellings.
- 82 Custom UK source categories (including Apprenticeship records, GRO indexes, and others)
- Custom tag types, roles, and sentences, including Census 1841 -Census 1901; Deportation; Birth Reg, Death Reg Mar Reg



"The UK edition removes all those irritating Americanisms that so often mar otherwise excellent software, and it replaces them with the UK equivalent - a big improvement..."

Family Tree Magazine October, 2004

# TMG 7.0 Version - New Functionality

- New buttons, and text descriptions
  - Deactivate in Program Options > Data Entry
  - Report Definition screen
  - The Exhibit Log
- Resizing windows
- New Reminder Pop-Up Windows for Tag Types, Sources, and Source Types
- Check for Duplicates While Adding People
- New buttons on the Master Source List & Source Types allow you to Export and Import Sources – exchange with other users
- New buttons on the Tag Entry Screen make it easier to repeat the previous citation or select from a list of recent citations

- A new button on the Citation Entry screen allows you to add a new source without going first to the Master Source List.
- A new Sentence Preview helps you to predict what a sentence will look like in a report.
- New Associates Window shows principals and witnesses who share an event
- The List of Witnesses on the Tag Entry Screen now displays the specific name variation that has been associated with that event for each witness.
- The Relationship Calculator and the Automatic Relationship Tag now also display relationships as calculated through the spouse(s) of one of the two people.



### TMG 7.0 Version - New Functionality

- The Picklist and Project Explorer can now be sorted by the Last Edited Date.
- The Picklist and Project Explorer now support a variety of multi-level sorting options.

#### **New Narrative Features**

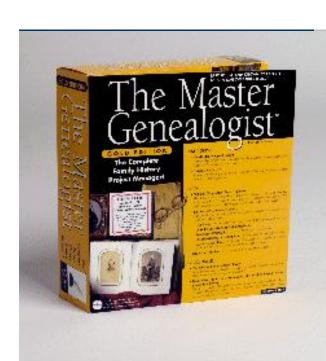
- A new sentence code, [+] at the beginning of a sentence will add it previous sentence.
- A new sentence code, [:NP:] no punctuation to the end of the sentence.
- A new standard tag type, NarrativeChildren, can be used to override the standard "Children of X and Y were:" text.

#### **Multimedia Enhancements**

- Exhibit Highlighting allows you to "draw" on an image to annotate it.
- Option to link Word documents, Powerpoint presentations or other non-standard exhibit types.
- A new Preferences page (Program Options > Exhibits) allows you to specify whether new images that you add to the Exhibit Log will be made internal or external by default (or ask each time).

These are the main new features, there are many more – see Wholly Genes Newsletter, 30 December 2007, Issue 2007-20,

or Wholly Genes website http://www.whollygenes.com/Merchant 2/merchant.mvc?Screen=TMGNEW7



# The Master Genealogist by Wholly Genes Software

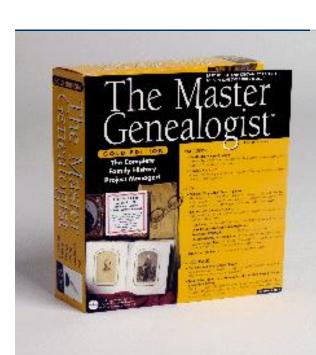
Introduction

**Advanced Features: Two Sessions** 

**Companion Products** 







# The Master Genealogist by Wholly Genes Software

Data Set Manager, Accents, Focus Groups, Custom Flags, Advanced Report Options, Report Filters

Creating Sources and Repositories, Custom Roles, Witnesses, Sentence Structure, Source Templates, Citation Output and Exporting Data







### Help & Aids - Check Out & Use

- Preferences
- Beginner vs Advanced Mode
  - Default Basic features (Beginner)
- Hot/Repeat Keys
  - Toolbar or Ctrl Keys
  - **■** Function (Hot) Keys F3 repeat
  - **Text Macros**
- F2 − Access a list of all the places
- Last Viewed Person
- Bookmarks
- Toolbars





The Data Set Manager, allows you to control and manage the data sets within your projects. You can:

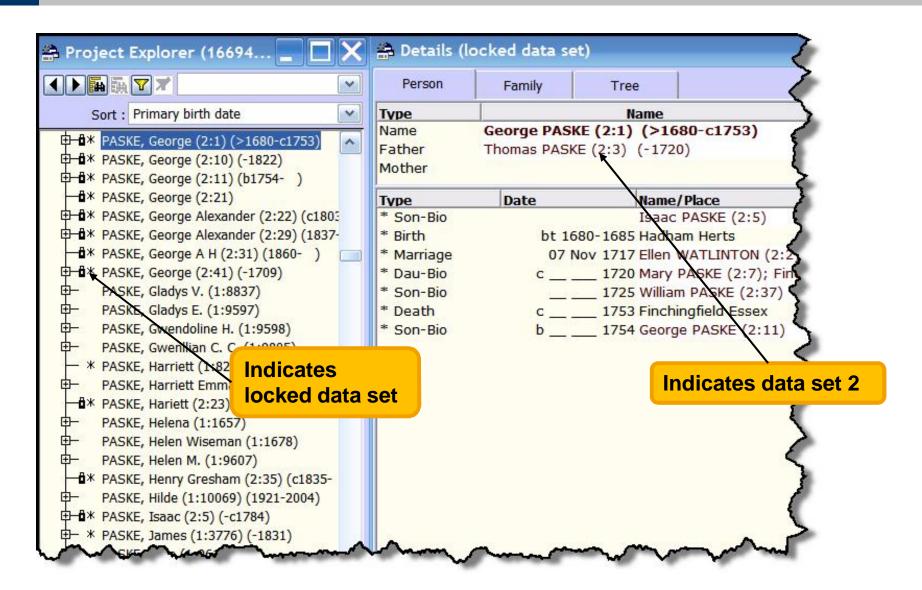
- Unlock data sets (make them read/write)
- Enable data sets (make them visible in the <u>Project</u> <u>Explorer</u> and <u>Picklist</u>)
- Create new data sets
- Edit data sets

You can create data sets

- By importing data from other researchers GEDCOMs
- From a sub-set of your own data

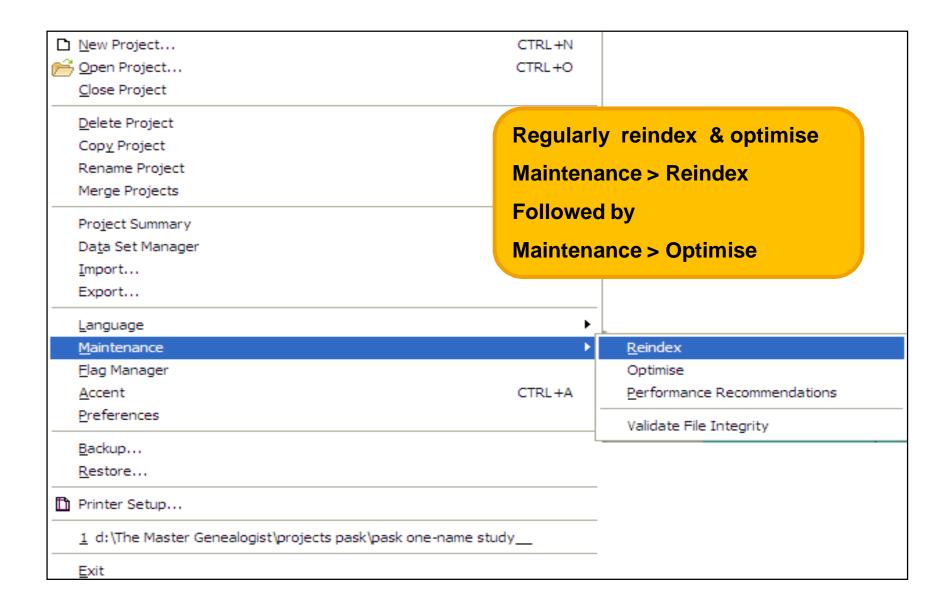


### Displaying Two Data Sets



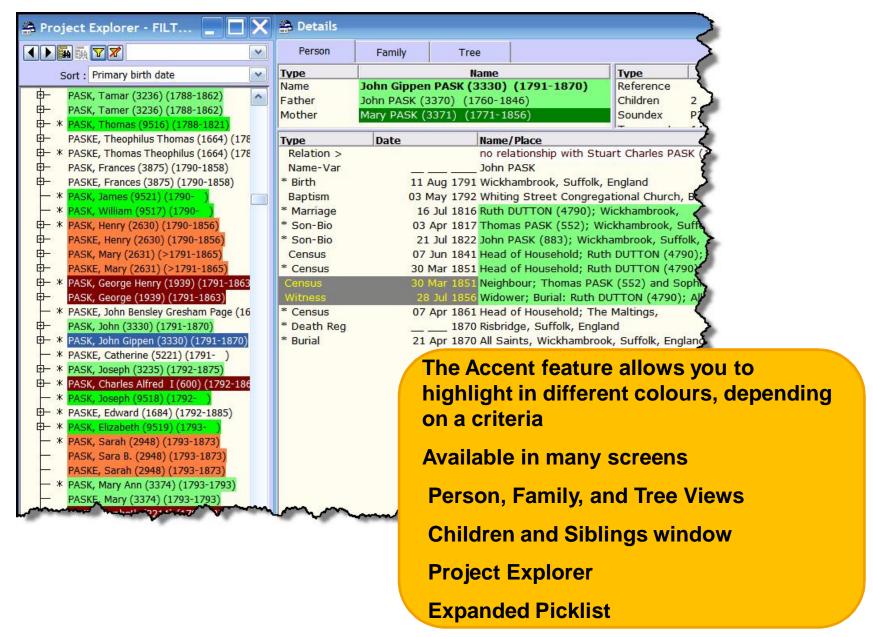
The Master Genealogist, Teresa Pask / 12 uridge@one-name.org

# Maintenance - Reindex & Optimise



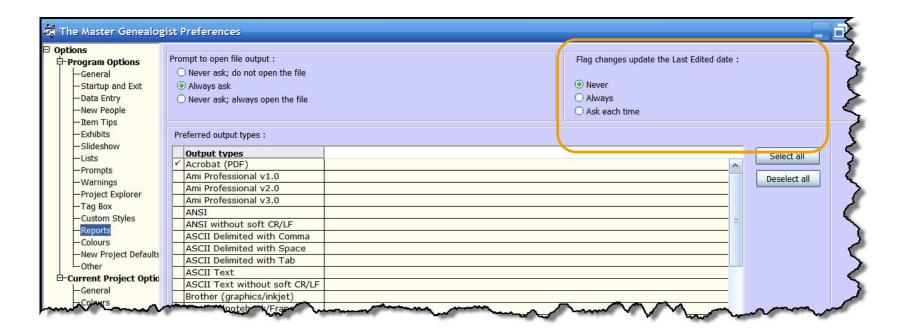
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#### **Accents**



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# Flag Changes



Before changing Flag changes Check Preferences > Reports

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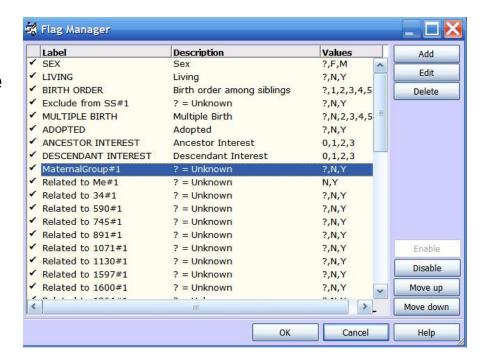


### Accents: Setting Up

#### **Two-step process**

Once you have determined the criteria – either or field or flag has a value to match the criteria.

- 1. Set up the value. For example, the Flag xyz = Y.
- 2. Define the accent.



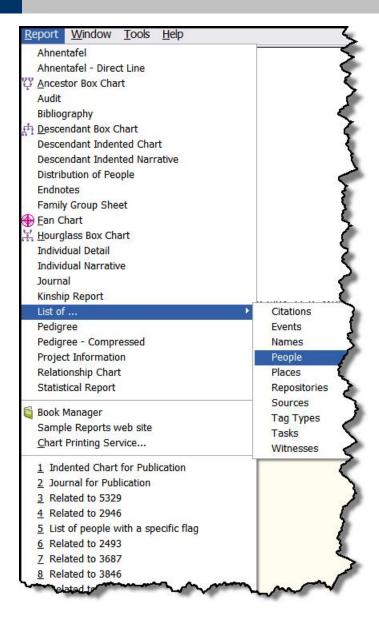
You can create a flag for most criteria – standard ones are provided.

# Maintaining Flags

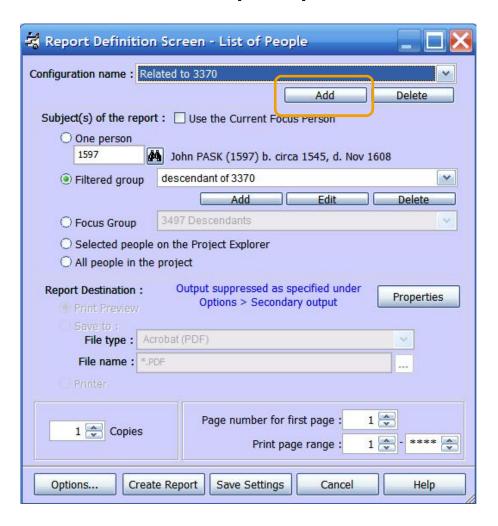
- Flags Identify certain features
  - **■** Control Accent colours
  - Select people for various operations
- Standard flags:
  - Sex
  - **■** Living
  - **■** Birth Order
  - Adopted
  - Multiple Birth
  - Ancestor Interest
  - Descendant Interest
- Customized flags
  - Create, Edit, Delete
  - **■** Enable, Disable



# Accents: Setting the Value - Define a Report

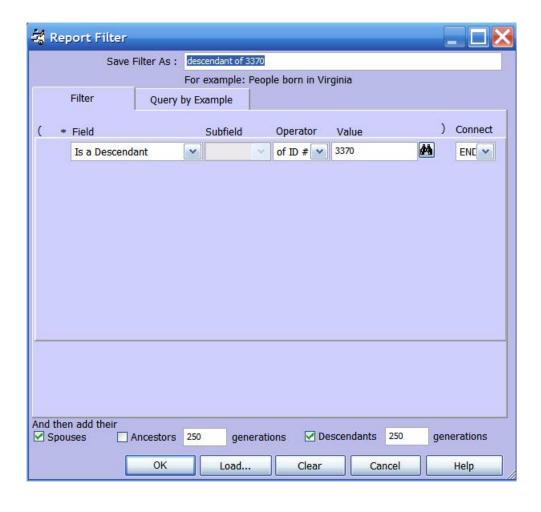


#### **Use the List of People Report**



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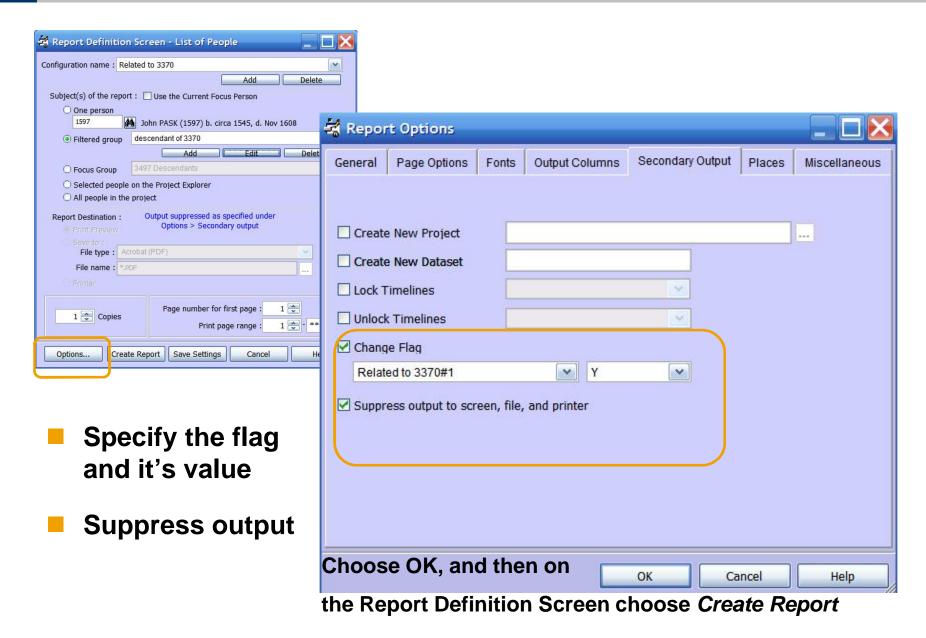
# Specify a Filter



- Specify the field that you will base your criteria on
- Add (if applicable) their
  - **■** Spouses
  - Descendants

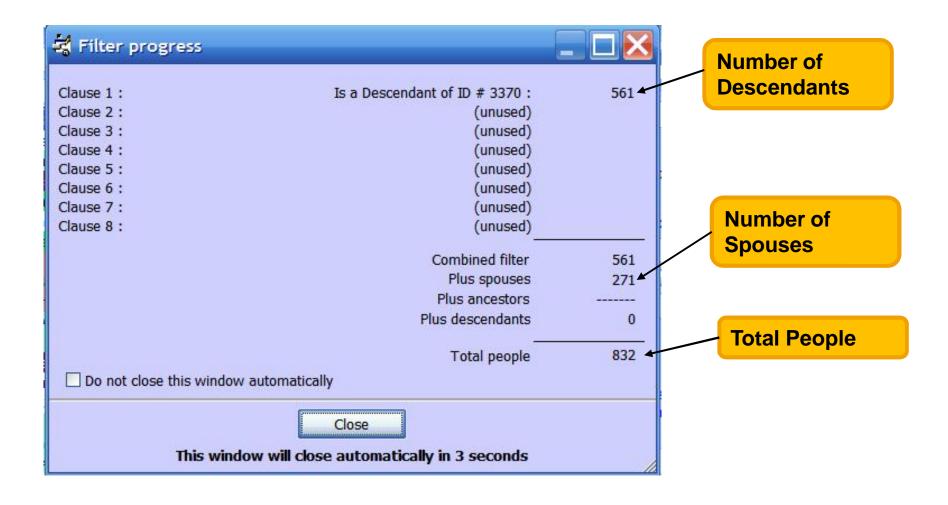
The Master Genealogist, Teresa Pask / 19 uridge@one-name.org

# Specify the Report Options



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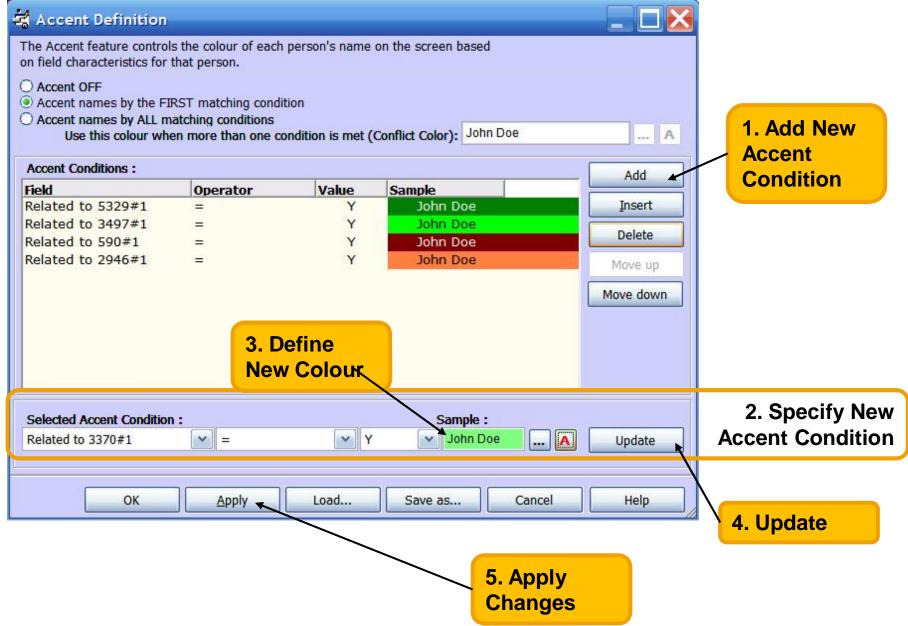
#### Filter Results



Flag is changed for all people.

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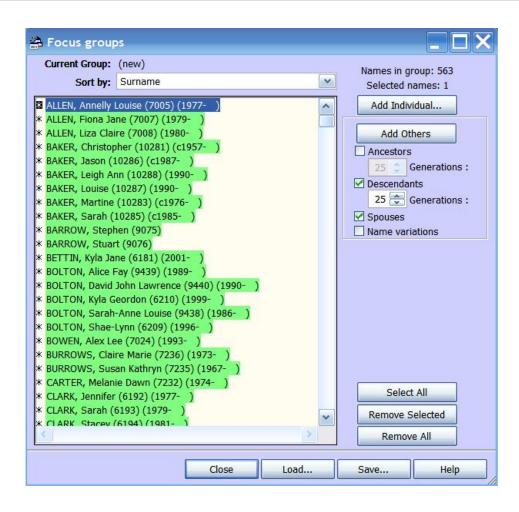
#### **Define Accent**



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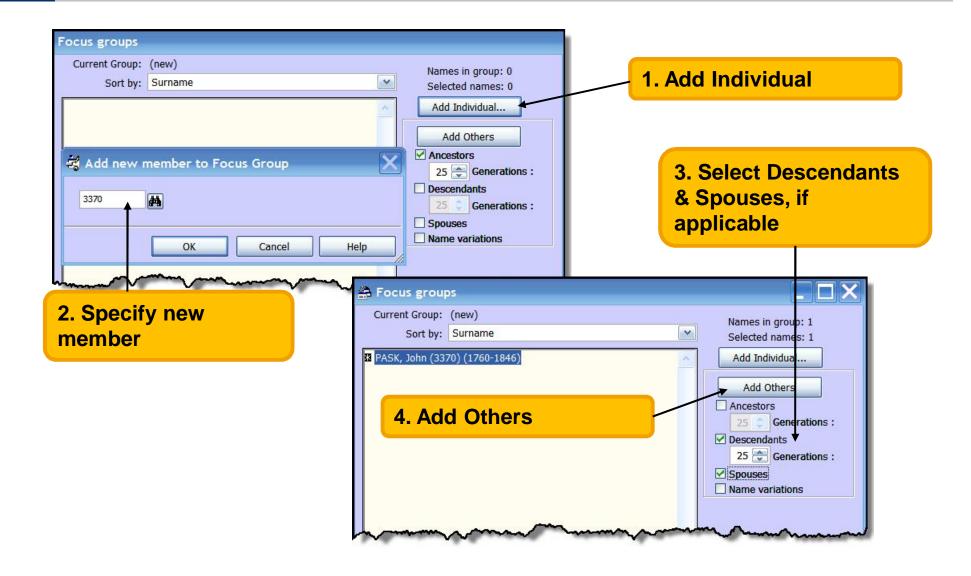
# Focus Group

- A focus group is a collection of individuals that may be used to specify Subjects when searching the web and for other purposes such as exporting.
- You can save Focus Groups for later use.



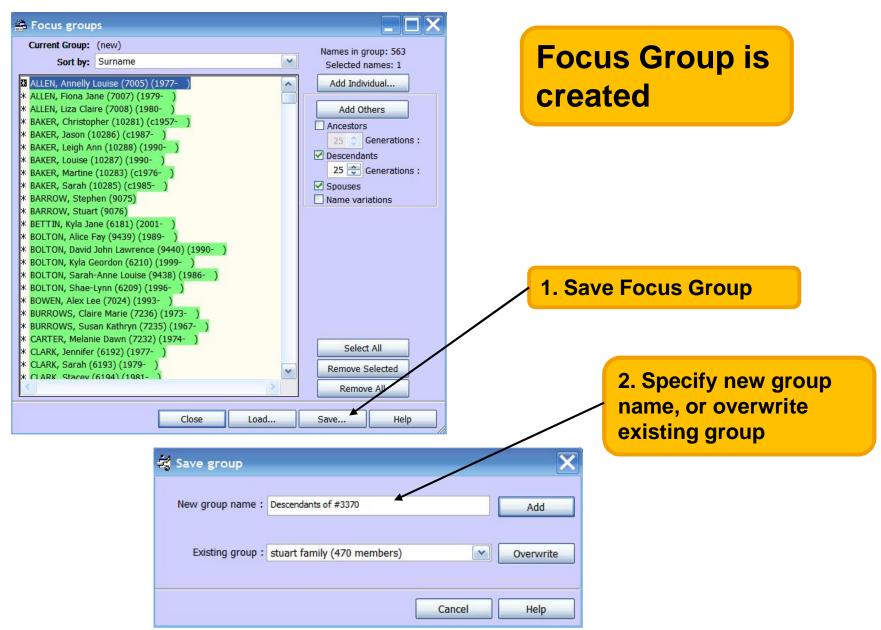
The Master Genealogist, Teresa Pask / 23 uridge@one-name.org

### Focus Group



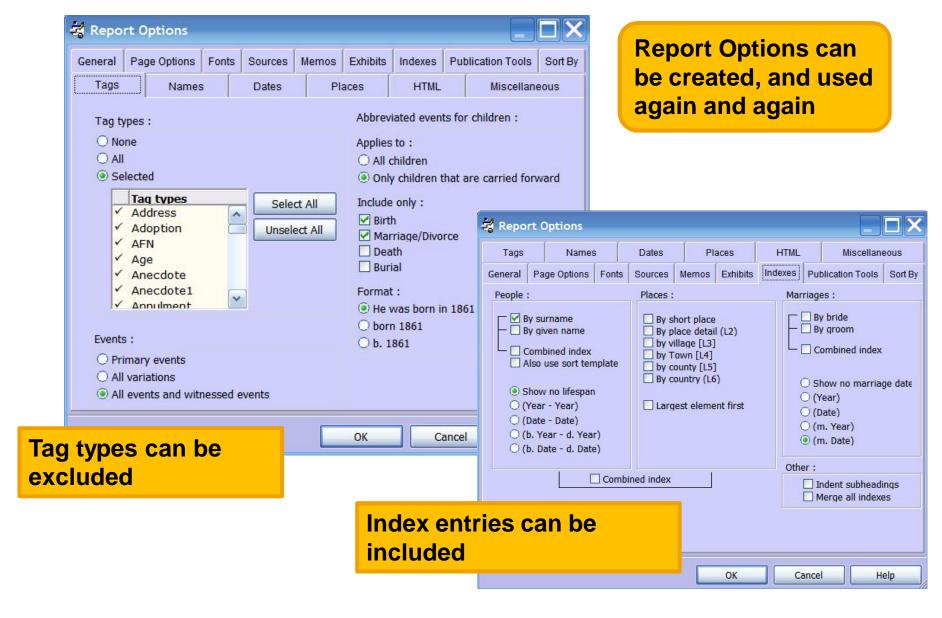
The Master Genealogist, Teresa Pask / 24 uridge@one-name.org

### Save Focus Group



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### **Advanced Report Options**



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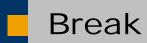
# Report Filters - Examples



Filters can be created and used again and again



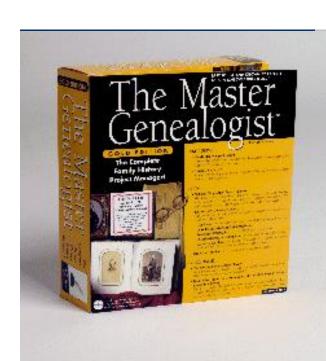
The Master Genealogist, Teresa Pask / 27 uridge@one-name.org



# Let's have a short break Only fifteen minutes though!



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# The Master Genealogist by Wholly Genes Software

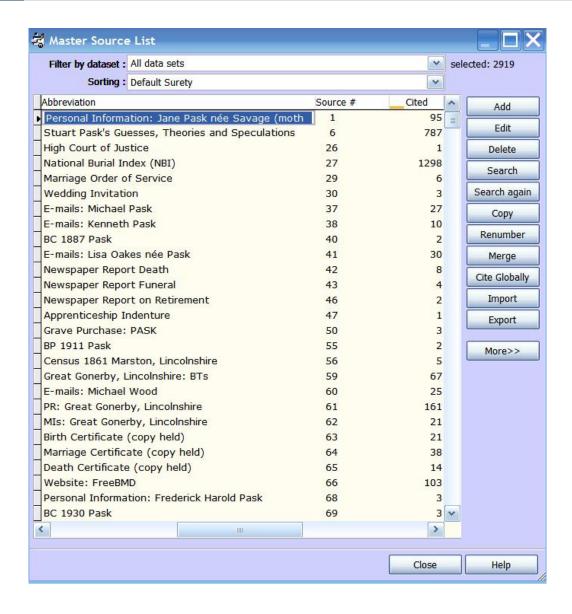
Data Set Manager, Accents, Focus Groups, Custom Flags, Advanced Report Options, Report Filters

Creating Sources and Repositories, Custom Roles, Witnesses, Sentence Structure, Source Templates, Citation Output and Exporting Data





### **Creating Sources**



The Master Source List is a list of all of the sources recorded in the project.

The default Master
Source List displays the
Source Abbreviation,
Source Number, Default
Surety, and the number
of times each source
has been cited for each
of the active sources in
the project.

To access the Master Source List:

From the Tools menu, select Master Source List.

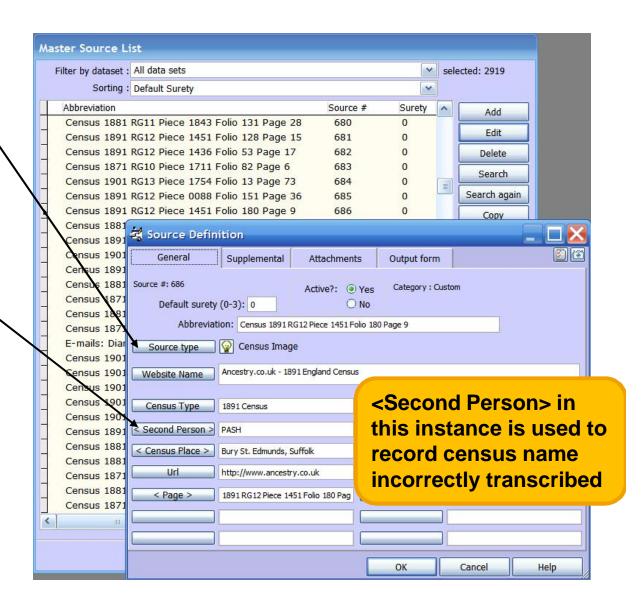
The Master Genealogist, Teresa Pask / 30 uridge@one-name.org

#### Source Definition: General Tab

Source type – determines the source templates, that contains the sources fields that will be printed in narratives

<... > Indicates whether optional or mandatory

Defaulted fields can be overridden in the output form – alternatively, you change the template

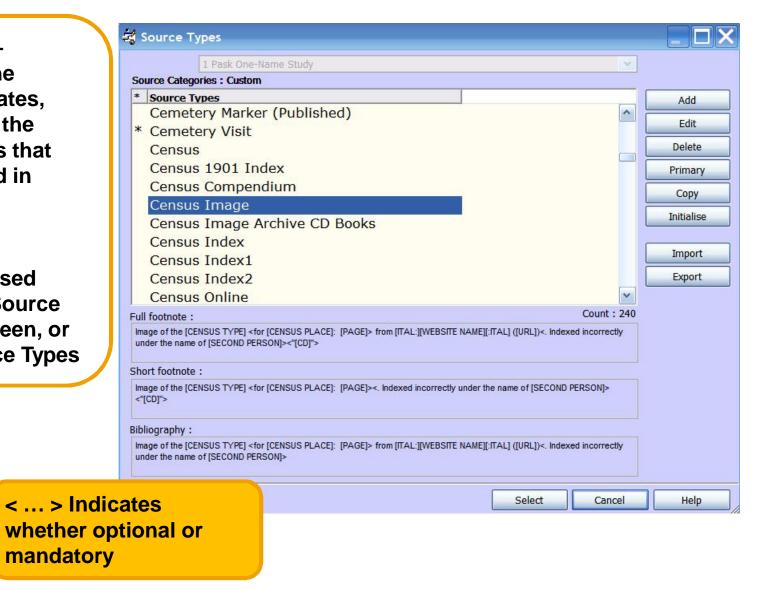


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### Source Type

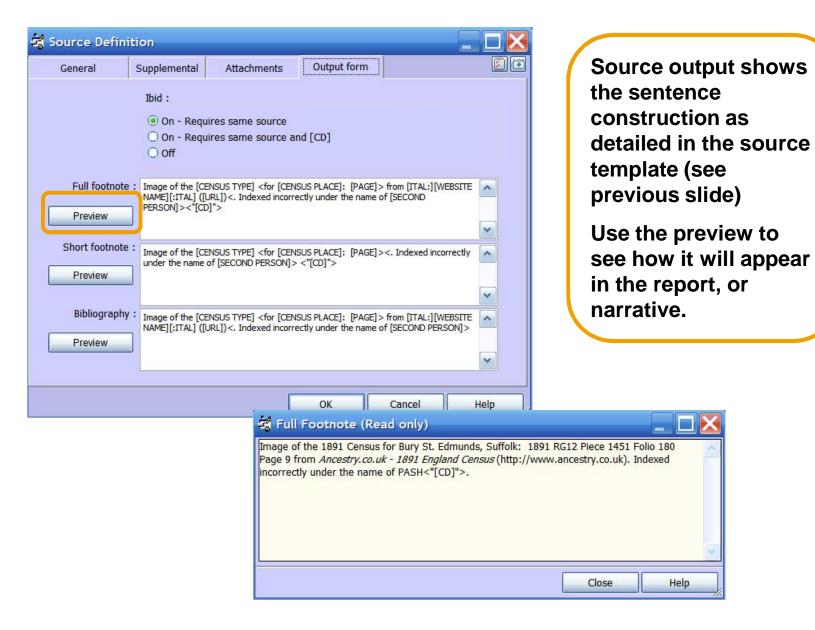
Source type – determines the source templates, that contains the sources fields that will be printed in narratives

Can be accessed through the Source Definition screen, or Tools > Source Types



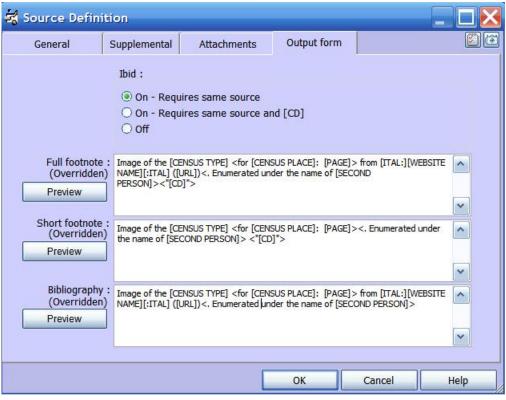
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# Source Definition: Output Tab



The Master Genealogist, Teresa Pask / 33 uridge@one-name.org

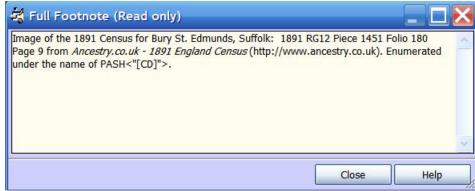
# Source Definition: Output Tab - Change Default



Source output can be overridden.

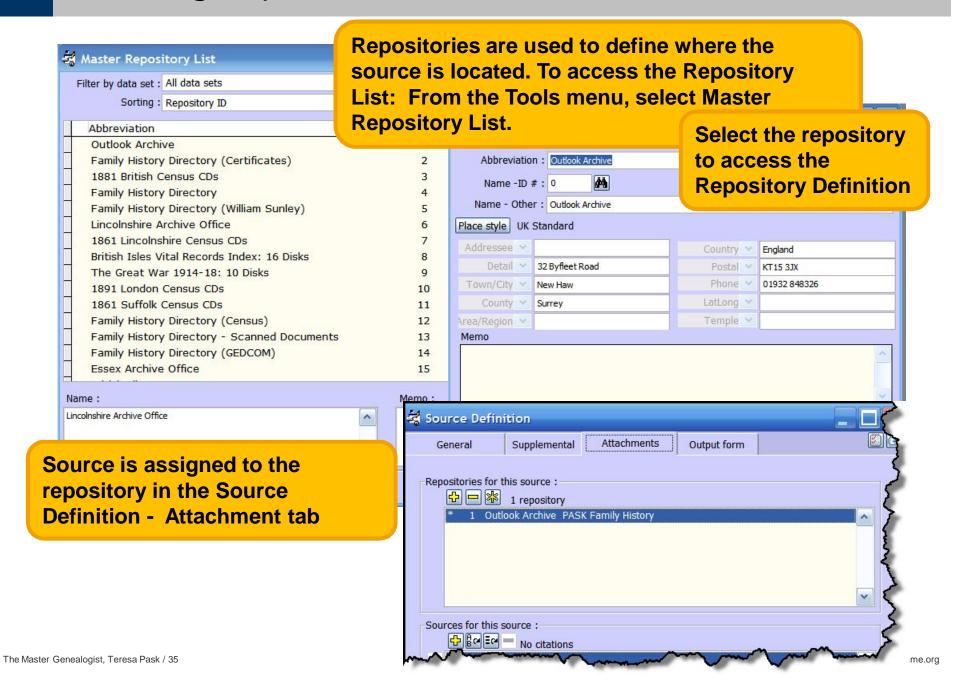
The word (Overridden) indicates that is the case.

Use the preview to see how it will appear in the report, or narrative.



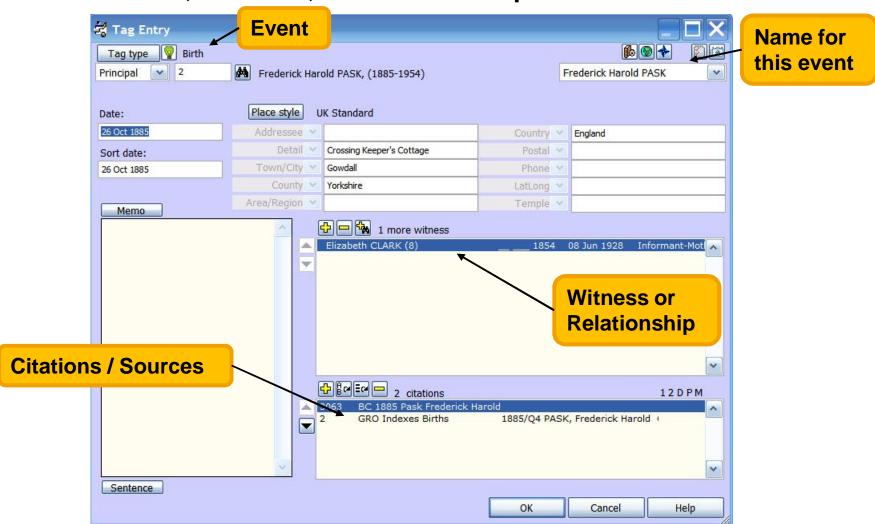
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# **Creating Repositories**



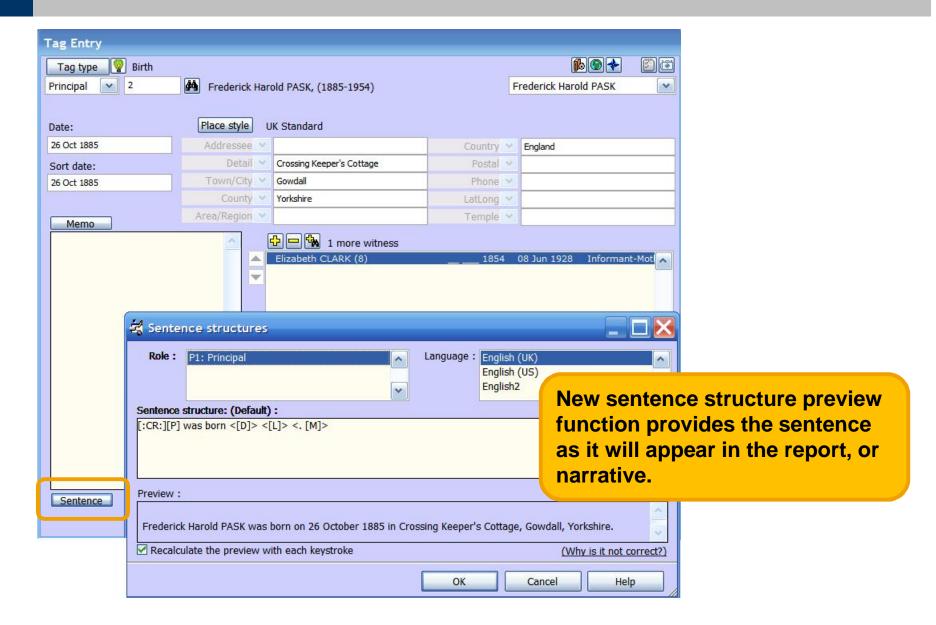


A tag is a collection of certain fields in which information is stored about a name, an event, or a relationship.



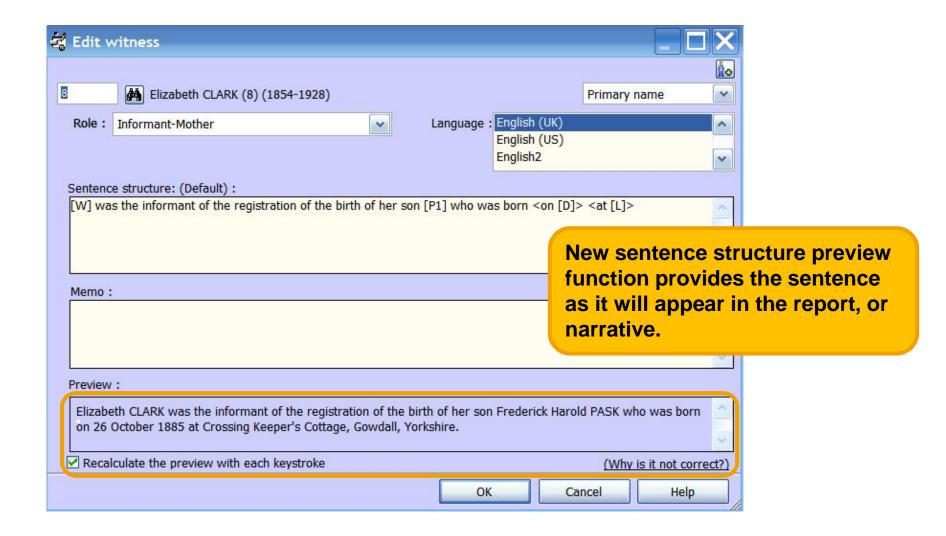
The Master Genealogist, Teresa Pask / 36 uridge@one-name.org

### Sentences



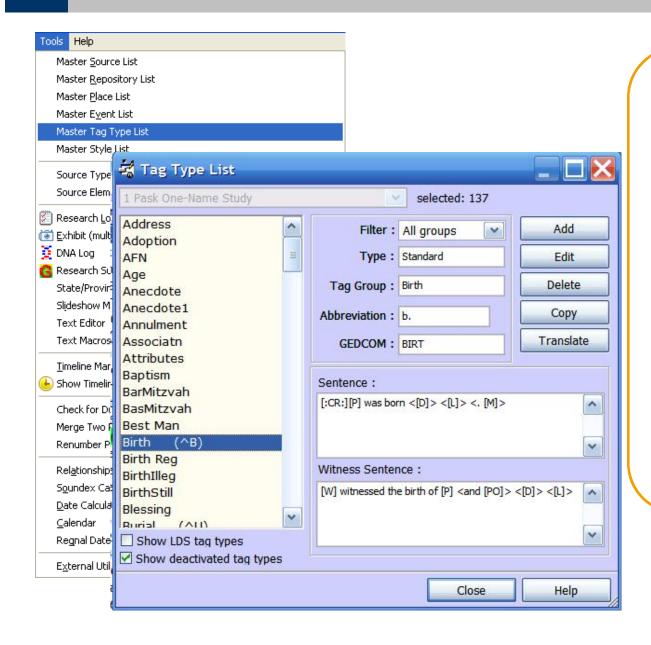
The Master Genealogist, Teresa Pask / 37 uridge@one-name.org

### Witness Sentence Construction



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# Tag Sentences Defaults from Tag Type List



The Tag Type List is a list of all of the tags detailed in the project.

To access the Tag Type List:

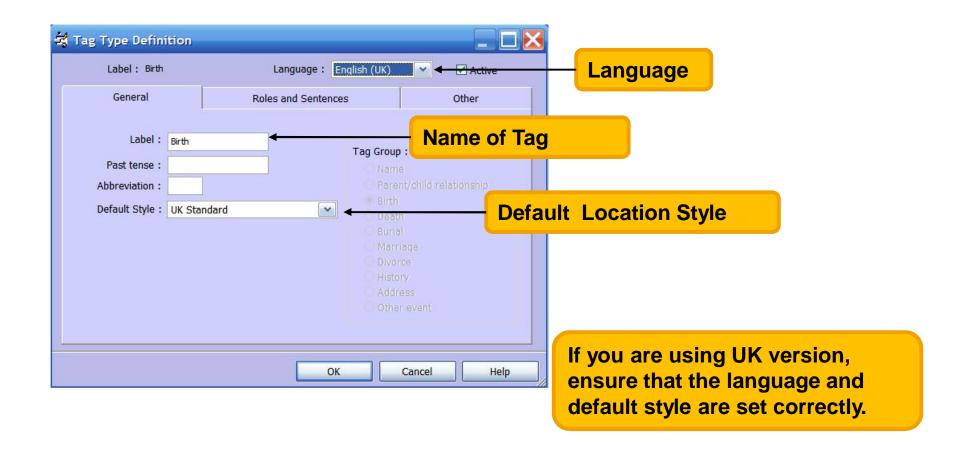
From the Tools menu, select Tag Type List.

The Tag Type List provides:

- Sentence
- Witness Sentence
- Roles and Sentences
- Other

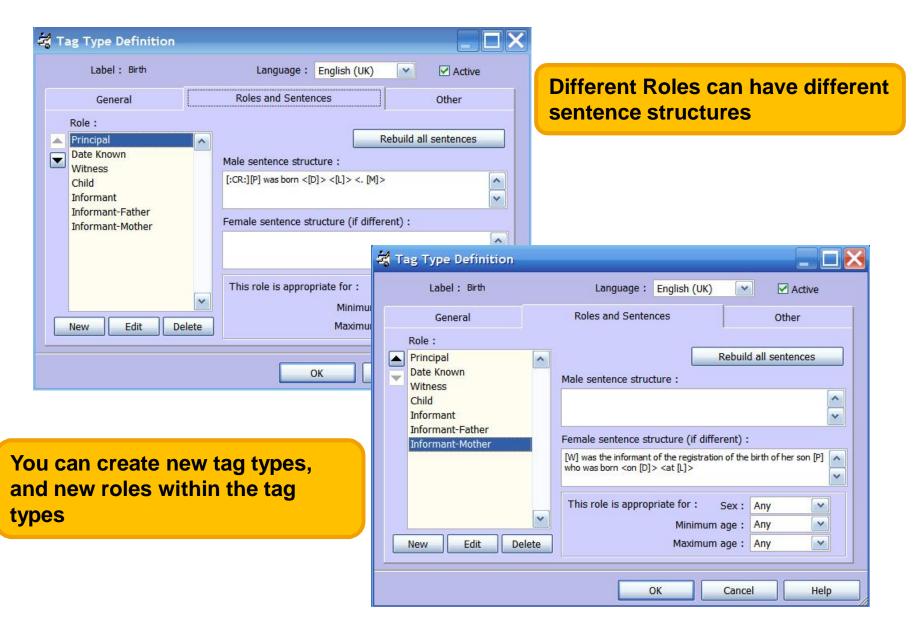
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### Tag Type Definition - General Tab



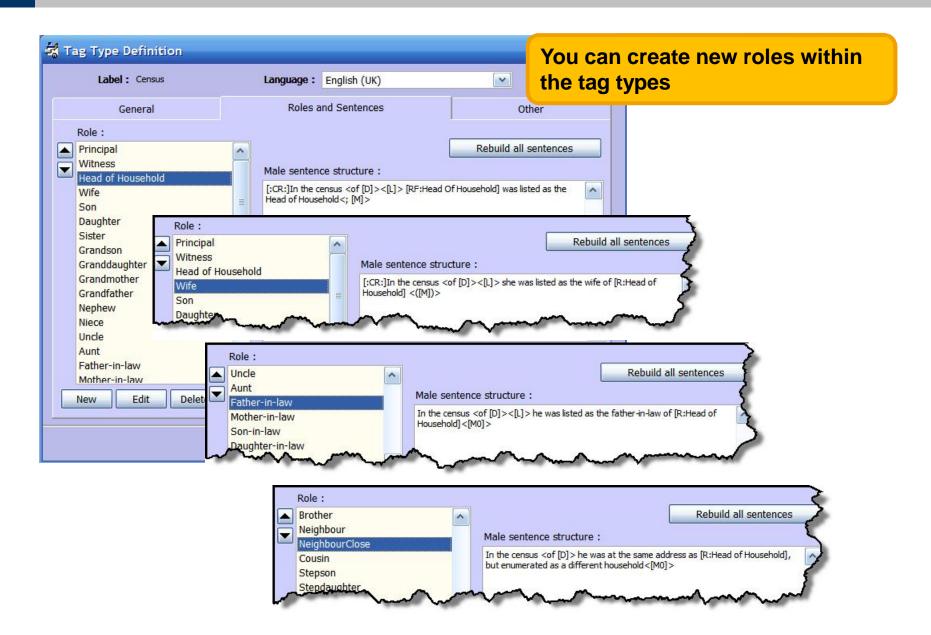
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### Tag Type Definition - Roles and Sentences



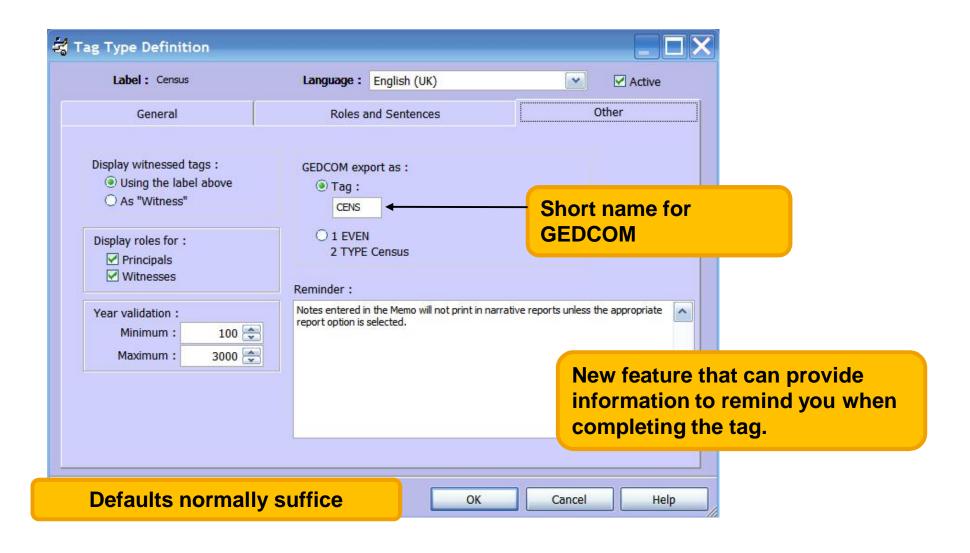
The Master Genealogist, Teresa Pask / 41 uridge@one-name.org

### Tag Type Definition - Roles and Sentences



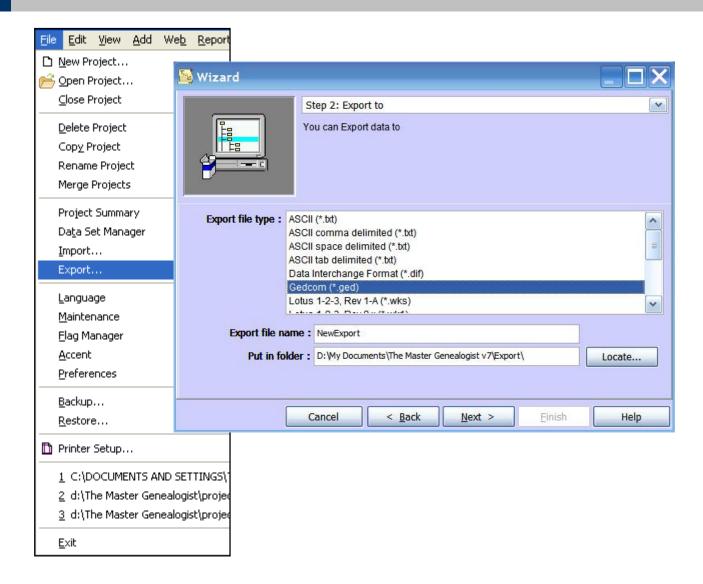
The Master Genealogist, Teresa Pask / 42 uridge@one-name.org

### Tag Type Definition - Other Tab



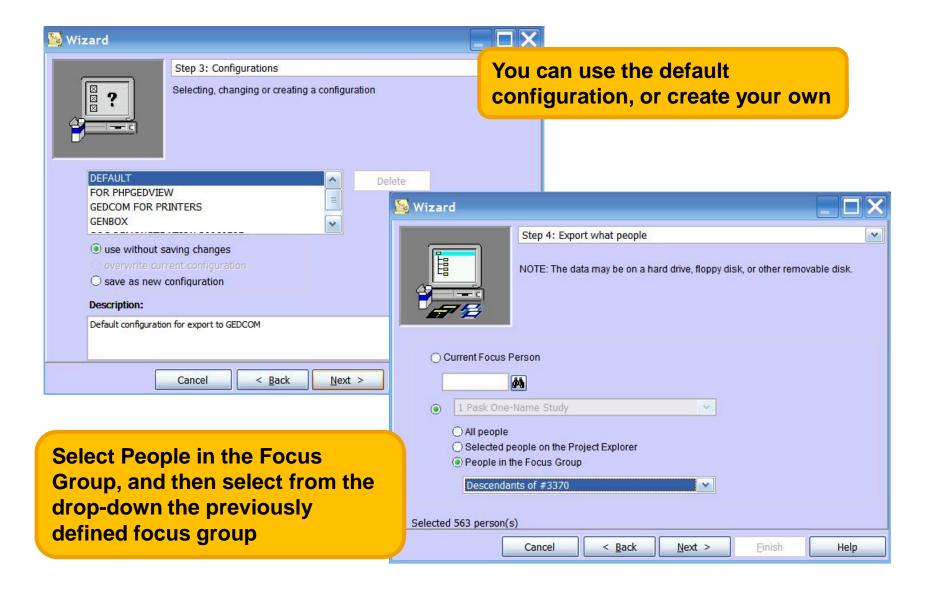
The Master Genealogist, Teresa Pask / 43 uridge@one-name.org

## Export Using a Focus Group: Step 1 & 2



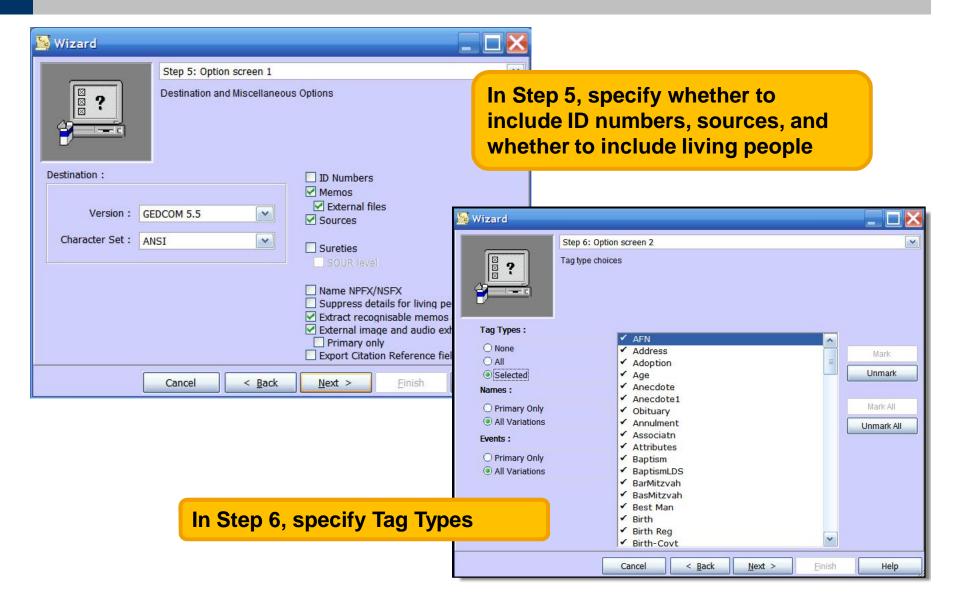
The Master Genealogist, Teresa Pask / 44 uridge@one-name.org

### Exporting Data - Using Focus Group: Step 3 & 4



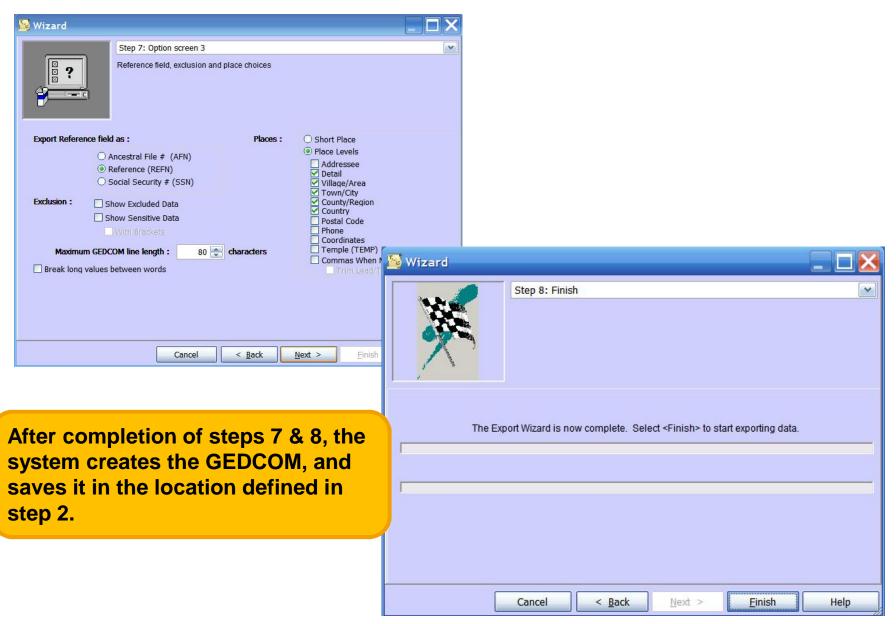
The Master Genealogist, Teresa Pask / 45 uridge@one-name.org

## Exporting Data - Using Focus Group: Step 5 & 6

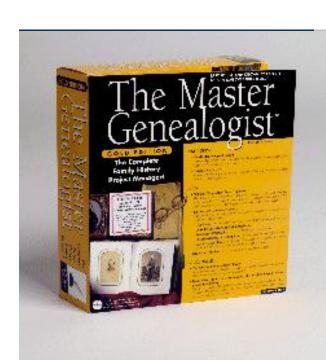


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### Exporting Data - Using Focus Group: Step 7 & 8



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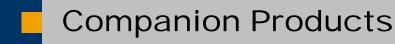
Introduction

**Advanced Features: Two Sessions** 

**Companion Products** 







- Second Site automatically transforms your genealogy data into web pages quickly and easily without knowing any HTML
- TMG Utility database modification tool for TMG



How did I create award winning websites?

At a push of a button, and a little help (or should I say a big help) from my friend John Cardinal.









### Second Site - Six easy steps:

- Start the program <u>Second Site</u>
   (available from http://www.johncardinal.com)
   TMG should *not* be running when you use Second Site.
- 2. Make a "Site Definition File"
  Use the File > New... command to make a new Site Definition File (SDF).
  Second Site stores the options you select to customize your site in this file. Select "English Standard" at the "Read default values from:" prompt.
- 3. Identify your TMG database Click the [Set Database...] button in the Data > Database section, navigate to your TMG database in the File Open dialog, and click [Open].
- 4. Give your site a title
  Key a title in the Pages > Site.Title textbox. Fill in the other textboxes in
  the Pages.Site section if you want.
- Identify yourself
   Key your name in the Pages > Compiler.Name textbox. Fill in the other textboxes in the Pages > Compiler section if you want.
- 6. Make the site
  Use the File > Make Site command to make the site. When Second Site is
  done making the site, a window will open with some status messages and
  some command buttons. Click the [Browse Site] button to open the main
  page of your site.

### Step 2: Make a "Site Definition File"

Use the File > New... command to make a new Site Definition File (SDF). Second Site stores the options you select to customize your site in this file. Select "English - Standard" at the "Read default values from:" prompt.

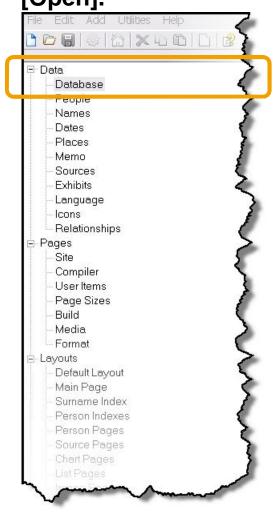


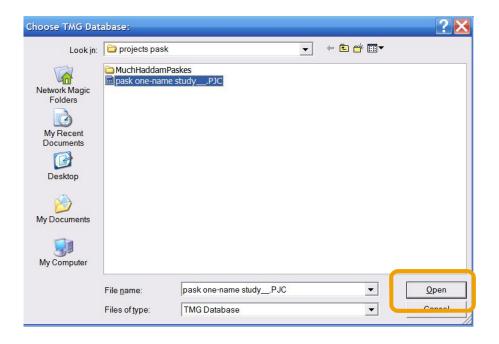


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# Step 3: Identify your TMG database

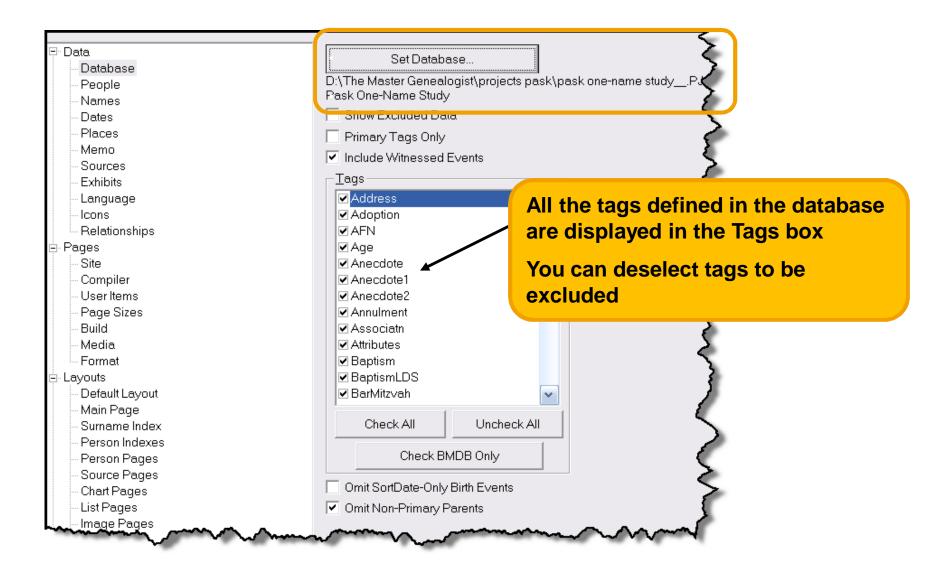
Click the [Set Database...] button in the Data > Database section, navigate to your TMG database in the File Open dialog, and click [Open].





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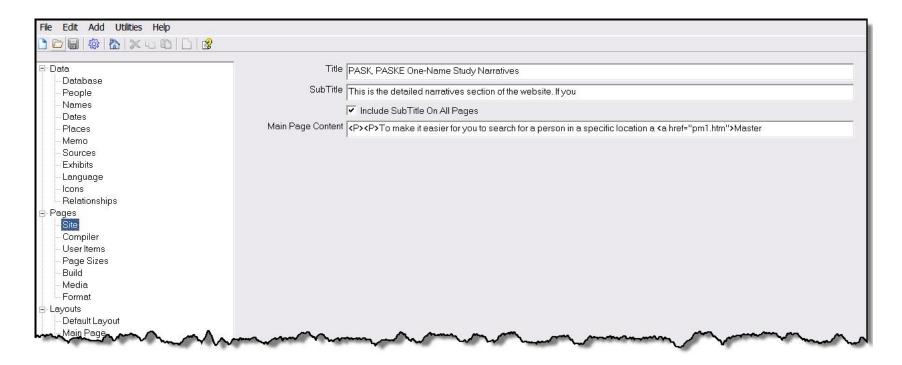
### Step 3: Identify your TMG Database



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# Step 4: Give your Site a Title

Key a title in the Pages.Site.Title textbox. Fill in the other textboxes in the Pages.Site section if you want.



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# Site Title - Impact

# Second Site 2

Title	PASK, PASKE One-Name Study Narratives
SubTitle	This is the detailed narratives section of the website. If you
ı	✓ Include SubTitle On All Pages
Main Page Content	<p><p>To make it easier for you to search for a person in a specific location a <a href="pm1.htm">Master</a></p></p>

### Website: Header

### PASK, PASKE One-Name Study Narratives

This is the detailed narratives section of the website. If you came here directly from a search engine it is recommended that you start at the home page of the Pask, Paske One-Name Study.

Narratives Info | Master Index | Surname Index | Master Place Index | Charts | My Family | New or Changed Narratives | Photograph Album | Pask DNA Project | Latest News [Blog] | Return to Home Page | Select by ID#

To make it easier for you to search for a person in a specific location a Master Place Index is available, sorted by Country, County, Town.

Family trees are provided in the Charts.

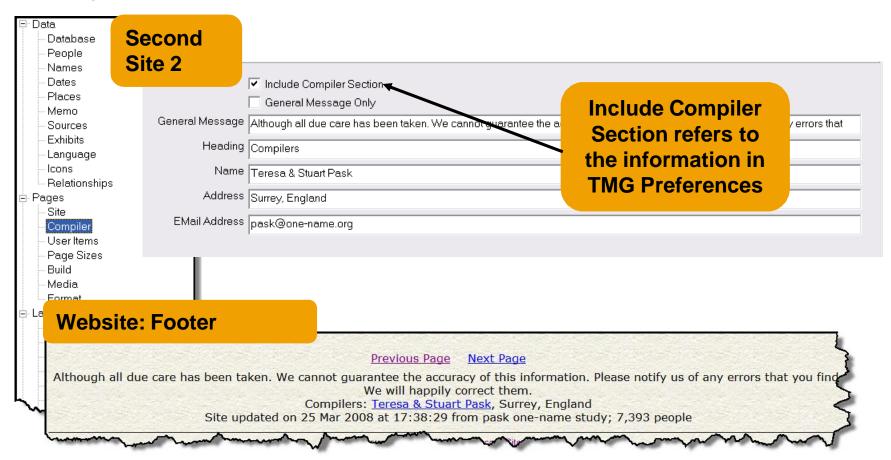
Photographs are provided in the Photograph Album.

Additional information is provided in the <u>sources</u>, including images. Some images require <u>Acrobat Adobe Reader</u>. Larger documents and images take longer to be added to the control of t

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### Step 5: Identify Yourself

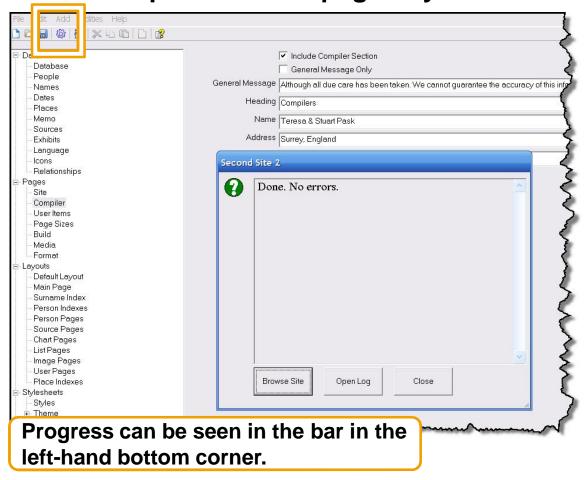
Key your name in the Pages > Compiler.Name textbox. Fill in the other textboxes in the Pages > Compiler section if you want.



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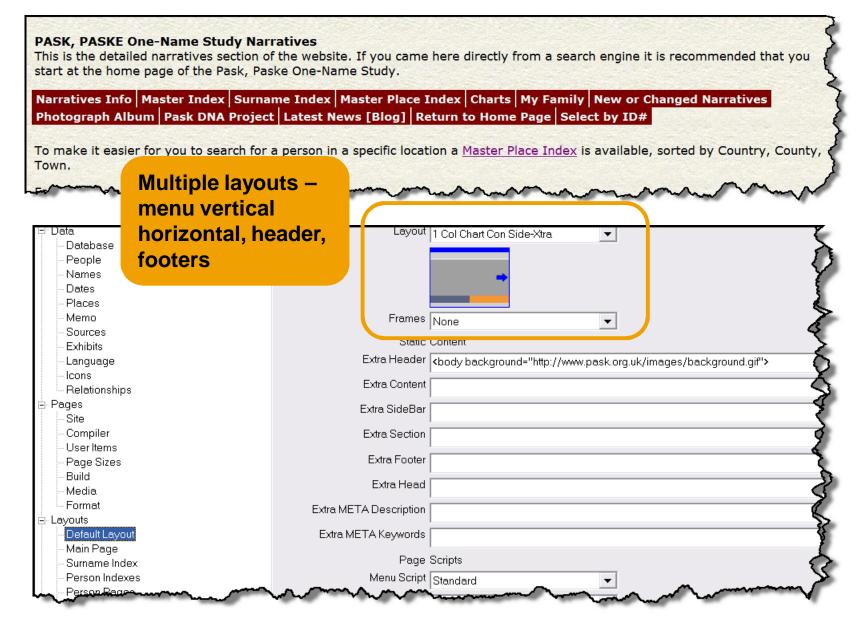
### Step 6: Make the Site

Use the File > Make Site command to make the site. When Second Site is done making the site, a window will open with some status messages and some command buttons. Click the [Browse Site] button to open the main page of your site.



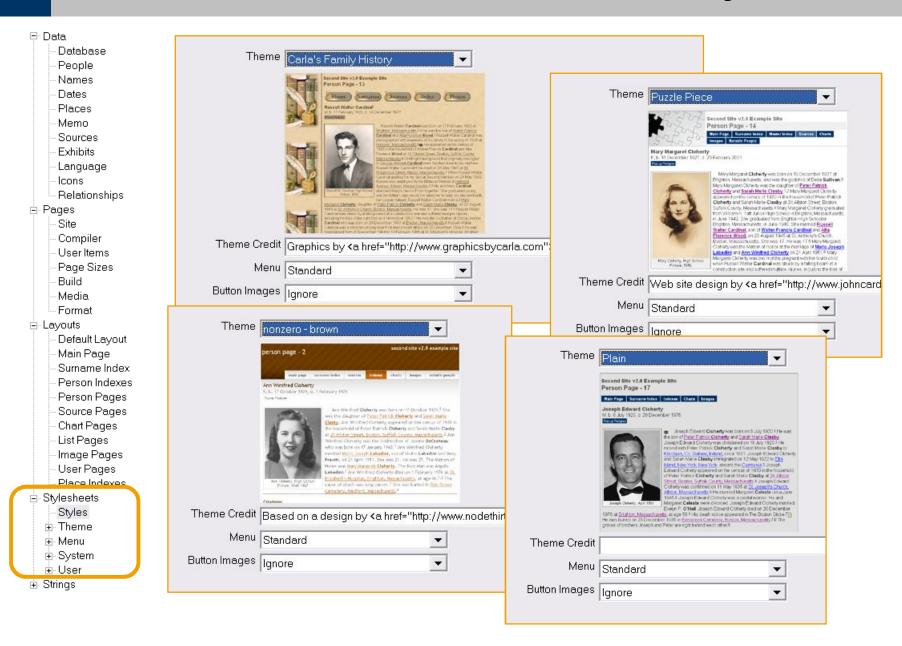
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### Features in Second Site 2 - Layouts



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## Features in Second Site 2 - Numerous Styles



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### Features: Sample Websites

John Edward PASK1.2

#774, b. 20 May 1873, d. 16 May 1916

Relationship=2nd cousin 2 times removed of Stuart Charles PASK Last Edited=22 Mar 2008

### Appears on charts

Chart 1: John Pask, (1760-) wife Alice Woodcock lived in Great Gonerby, Lincolnshire #34



John Edward was also known as John E. PASK. 4.5 John Edward was also known John Edward PASK was born on 20 May 1873 in Manthorpe, Lincolnshire. 1,2,7 and Ann BELL. 1,3 In the census of 3 April 1881 in Bottom Road, Manthorpe, L aged 7 born in Manthorpe, the son of Ann PASK. In the census of 5 April 1891 was listed as a General Labourer, aged 17 born in Manthorpe, the son of Ann I buried on 2 April 1892 in St. John, Manthorpe, Lincolnshire. 9,10 Between 1893 ar Royal Garrison Artillery for 19 years. He attained the rank of Sergeant in the R Coy. Service No. 7080.7.11 He was listed in the census of 31 March 1901 at Dist Germans, Cornwall, an unmarried N. C. Officer a Bombardier in the Royal Gar Grantham Lincolnshire. 6 He witnessed the marriage of Margaret Elizabeth LID on 8 December 1904 in United Free Church of Scotland, Stronsay, Orkney. 12

John married Elizabeth Ann MAGEE in 1905 in the St. Germans registration di married life they travelled with the Army, and lived in Northern Ireland, and for four years in Hong K His wife, Elizabeth, died in child birth on 8 June 1912 in Hong Kong. 14 On leaving the army he became Tibshelf's collieries.11

John married Lizzie L. TOMPKINS in 1914 in the Newark-on-Trent registration district. 15,16 He lived at Elm Tree Terrace, Tibshelf, Derbyshire. In accordance with army rules, he remained on 'reserve' the colours if an emergency warranted it. Therefore, at the outbreak of World War I, John was recald served initially in the Royal Field Artillery

Weymouth on Southern Coast Defences. the time he was stationed in Portland.3,7,1 John's obituary was recorded in The Derb

www.pask.org.uk

There are endless sites listed on http://www.johncardinal.com/ss/e xamples.htm.

The choice is yours!

All were achieved using Second Site.

> http://kerrysdavis.home.c omcast.net/~kerrysdavis/



### The Davis-Bean Trees

Our Davis-Bean ancestors began arriving in America from England in the early 1600s, first settling in Virginia, Maryland and New England



List of Wills Notable Women Ancestors Ann Alcock Our Salem Witch

Recently Updated

I first became vaguely interested in finding out more about my ancestors during the 1960s when my Davis grandmother, Alice Marie Kingman, gave me a binder of typewritten genealogy data compiled mostly during the 1920s and 1930s by her mother-i law and my great grandmother Rozina Phebe Fairchild. But I put the binder aside for another 10 years or so before looking at again.

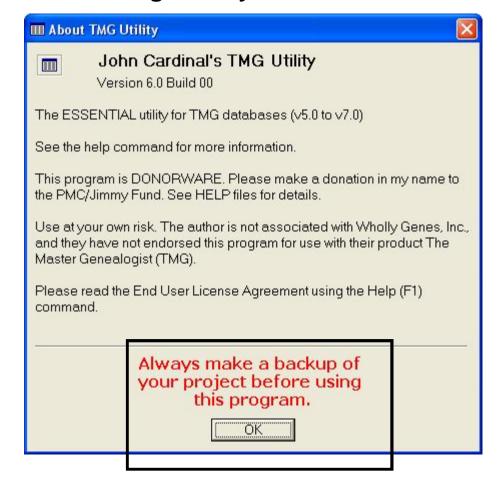
Then, in the 1970s, my mother, Margaret Bean Davis, her sisters, Barbara Bean Gale and Dorothy Bean Johnson, and brother Alfred Garvin Bean, pulled together some Bean, family history, which includes O'Bryans and Hiltons, among others. A good deal of my original Bean/Hilton data was based on information gathered, also in the 1930s, by another great grandmother on the



# TMG Utility

### Available from <a href="http://www.johncardinal.com">http://www.johncardinal.com</a>

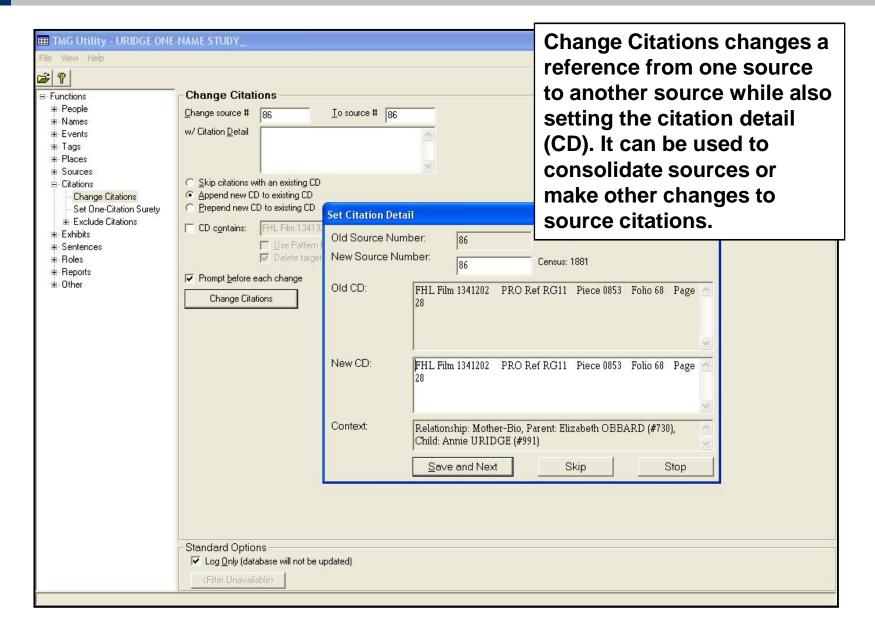
### TMG should not be running when you use Second Site.



### **Demonstration**

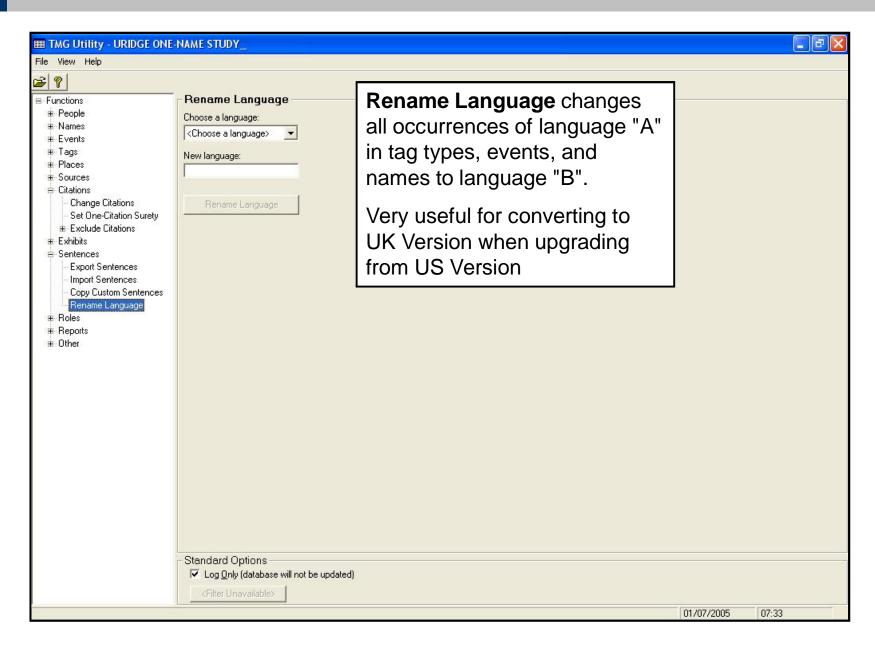
The Master Genealogist, Teresa Pask / 61 uridge@one-name.org

### Citations



The Master Genealogist, Teresa Pask / 62 uridge@one-name.org

## Sentences - Rename Language



The Master Genealogist, Teresa Pask / 63 uridge@one-name.org



# Using The Master Genealogist - Advanced

I hope that this course has significantly improved the ease of using the program and is helpful in your understanding of TMG.

We covered the more advanced concepts of:

- Data Set Manager, Accents, Focus Groups, Custom Flags,
   Advanced Report Options and designing report filters,
- Creating Sources and Repositories, Custom Roles, Witnesses, Sentence Structure, Source Templates, Citation output and Exporting data.
- In addition, companion products including Second Site, and TMG Utility.



### More Information: The Master Genealogist

### **Available from:**

### TWR COMPUTING

Clapstile Farm, Alpheton, Sudbury, Suffolk, United Kingdom, CO10 9BN Telephone 01284 828271 <a href="http://www.twrcomputing.co.uk/">http://www.twrcomputing.co.uk/</a>

The Master Genealogist Gold UK Edition v7.0 – download or CD £39.95 Includes free delivery

Or

### **Wholly Genes Software**

- www.whollygenes.com
- Download only: (includes electronic Users Guide\*) \$59.00
- Upgrade from 6.0 to 7.0 \$29.95
- There is an option to download a 30-day free trial (43.4 Megs)

The Master Genealogist, Teresa Pask / 65



### More Information: Web Sites

My websites <u>www.uridge.org</u> <u>www.pask.org.uk</u>

**TMG User Group** 

http://www.rootsweb.com/~ohcagg/tmg/ lists lots of links, handouts, information etc.

**Caroline Gurney** 

http://homepage.ntlworld.com/caroline.gurney1/TMG.htm provides UK Source Templates, Timelines, UK Place Styles, TMG Layouts, Tags and Sentences

**SecondSite & TMG Utility** 

http://www.johncardinal.com/