

Oh, The Wonderful Things You Can Do With a filter!

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This presentation is not intended to be a comprehensive lesson on how to create a filter. My goal is to provide some tips regarding situations where a filter might allow you to access information more quickly or more thoroughly. Some of these examples are probably obvious and you've most likely used them, but hopefully, others will be more unique situations that you haven't thought about. I've found that the more I use filters, the more comfortable I've become in using them, and as a result the more often I think of a filter when I need to retrieve some information from my database.

If you're just beginning to use filters and need to learn the basics, there are several sources available with detailed information including:

- A Primer for The Master Genealogist by Terry Reigel (pp 61-65)
- Terry's TMG Tips at <http://tmg.reigelridge.com/Filters.htm>
- TMG Help files (which actually have several good items on using filters)

But for now, all we need to know are a few very basic commands

- AND and OR
 - AND means that you want the filter to search for items which meet **BOTH** conditions
 - OR means that you want the filter to search for items which meet at least **ONE** of the conditions
- Parentheses
 - These are needed when you start mixing AND and OR operators.
 - For example:
 - Surname is Pickle AND (Given Name is John OR Given Name is Tom) would find everyone named John Pickle OR Tom Pickle. It would not find anyone with a surname other than Pickle. It would also not find anyone with a given name other than John or Tom.
 - But, (Surname is Pickle AND Given Name is John) OR Given Name is Tom would find everyone named John Pickle as well as everyone whose given name is Tom (with any surname)
 - It's important to think about what the results will be when you start mixing operators and to place the parentheses where they are needed to give the results you want.
- Use of the "|" (pipe)
 - Rather than using the OR at the end of a filter (and worrying about the parentheses), you can place the "or" condition within the value you are searching. For example, this filter will find any event which took place in Wyoming County New York or in Erie County New York

The screenshot shows the 'Filter' dialog box in The Master Genealogist. It contains two filter rows. The first row has 'Any Event...' selected for the field, 'County' for the subfield, 'Contains' for the operator, and 'WYOMING|ERIE' for the value. The second row has 'Any Event...' selected for the field, 'State' for the subfield, '= Equal:' for the operator, and 'NEW YORK' for the value. The 'Connect' column shows 'AND' for the first row and 'END' for the second row. A red circle highlights the pipe character in the first row's value.

(* Field	Subfield	Operator	Value) Connect
<input type="checkbox"/>	Any Event...	County	Contains	WYOMING ERIE	AND
<input type="checkbox"/>	Any Event...	State	= Equal:	NEW YORK	END

- Wildcards
 - A "?" is used to replace one character while an "*" is used to replace a string of characters. Note that these will only work with an operator of "like" not "equal" or "contains"
 - I often use Den*inger when searching for either Dentinger or Dendinger
 - If I used Den?inger, it would also find anyone with a surname of Dentzinger

- Use of [?] in the value field
 - This is one of my favorites, and I use it all the time when I set up a filter I plan to use over and over again.
 - When the filter is run, TMG will bring up the filter box where you fill in the value you want at the time you run the filter.
 - This way, you can use the same filter for multiple conditions. The example on the previous page was created with [?] in both conditions. I can use it to search for an event in any county or any state, so the filter becomes much more useful. The filter itself is coded as:

	* Field	Subfield	Operator	Value	Connect
<input type="checkbox"/>	Any Event...	County	Contains	[?]	AND
<input type="checkbox"/>	Any Event...	State	= Equal	[?]	END

Now that we know the basics, we need to talk about where we can use filters. This option is available in many places in TMG.

- Reports -The previous example came from the List of People report.

Report Definition Screen - List of People

Configuration name: List of People

Subject(s) of the report: ☐ Use the Current Focus Person

☐ One person: 35891 Donald REDING (35891)

☒ Filtered group: death in county state combination

☐ Focus Group: Adrian Martinez

☐ Selected people on the Project Explorer

☐ All people in the project

- You can also choose “filtered groups” when creating Journal or Family Group Sheet Reports:

Report Definition Screen - Journal Report

Configuration name: Journal Report

Subject(s) of the report: ☐ Use the Current Focus Person

☐ One person: 37423 Nicolaus NIEDERLANDER (37423)

☒ Filtered group:

☐ Focus Group: Niederlaender

☐ Selected people on the Project Explorer

☐ All people in the project

- You can also choose to filter the Picklist

Expanded Picklist (50597 names)

Data Set: All data sets

Sort by: Surname, Given name, Birth date

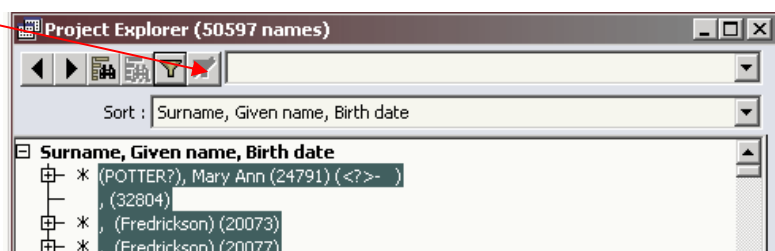
Search:

Person Name	Person ID	Birth	Death	Father's ID	Father's Name
* NIEDERLANDER, Nicolaus	37423				
* NIEDERLANDER, Nicolaus	37448	29 Sep 1842		37423	Nicolaus NIEDERLANDER
* NIEDERLANDER, Seraphina	37446	19 Jul 1838		37423	Nicolaus NIEDERLANDER
* NIEDERLANDER, Anne Marie	37413				
* NIEDERLANDER, Catherine	2960			2958	John NIEDERLANDER

Filter... Options... Event List

OK Cancel Help

- as well as the Project Explorer



Now we're finished with the basics! How can we use filters to aid our research? These are some of my favorites.....

Suppose you're surfing the web and you find someone who might fit into your tree. If you're like me, you have several people with the same name. For example, using Martha's presentation from last month, I found someone named John Dentinger in an 1871 newspaper. Since all the Dentingers in the US seem to come from the same area in Alsace, I'm quite sure he's going to fit into the tree, but I have lots of John, Johann, Jean and Joannes Dentingers. And, to complicate things further, some of them have also used the Dendinger spelling. So, I'll use a filter to narrow down the possibilities in my picklist.

The first line gives me my surnames of Dendinger or Dentinger. The next two lines will allow me to pick up anyone whose given name begins with John, Joannes, Johann or contains Jean (note the parentheses around these two lines). The next line limits the results to males to avoid picking up the female Jean or Jeanne. The final line narrows down the timeframe a bit. Since the article is in 1871, there's no point in looking at anyone born after that time. The resulting picklist is shown on the next page. If I wanted to limit it even further, I could have included a line to check for a "lived" tag with a specific state to match the newspaper article.

Person Name	Person ID	Birth	Death	Father's ID	Father's Name	Mother's Name	Spouse's Name
* DENDINGER, John	33542	c ___ 1841		33537	Lewis DENDINGER	, Christina (33538)	
* DENDINGER, John	32241	c ___ 1845		32232	Joseph DENDINGER	, Catherine (32233)	, Sarah (32242)
DENDINGER, John	32241	c ___ 1845		32232	Joseph DENDINGER	, Catherine (32233)	, Sarah (32242)
* DENDINGER, John	25994	14 Aug 1852	18 Feb 1928	17662	Ferdinand DENDINGER	WILLMAN, Magdalena (33 BALL, Mary (25995)	
* DENDINGER, John Anthony	16988	05 Oct 1857	06 Aug 1937	3120	Michael DENTINGER	WACKERMANN, Maria Ma DONAHUE, Elizabeth Ma	
* DENDINGER, John R.	35991	c ___ 1866	07 Nov 1925	35975	Joseph DENDINGER	, Ruthie (35989)	SORELL, Lulah (37247)
* DENTINGER, Jean	5845	02 Mar 1816		19107	Mathias DENTINGER	COLLARDO, Barbara (584	
* DENTINGER, Jean	34178	19 Jul 1826		1493	Jacob DENTINGER	LAZARUS, Veronique (155	
* DENTINGER, Jean	34175	16 Dec 1826		1788	Valentin DENTINGER	PHILIPPS, Catherine (182	
* DENTINGER, Jean Charles	19323	12 May 1808		19202	Anton DENTINGER	MATHERN, Marie Anne (14 FISCHER, Marguerite (1	
* DENTINGER, Jean Charles	19326	06 Jul 1852	03 Dec 1928	19323	Jean Charles DENTINGER	WEIGEL, Marie Anne (De ROY, Josephine (19349)	
* DENTINGER, Joannes	3956	27 Mar 1736	22 Jan 1812	2168	Joannes Henric DENTINGER	KLÜPSEL, Kunigunda (De KOCHER, Elisabetha (D	
* DENTINGER, Joannes	17308	15 Jul 1790		4337	Johannes DENTINGER	PHILIPPS, Agatha (Dentir	
* DENTINGER, Joannes Bernard	17307	06 Jan 1789	28 Oct 1867	4337	Johannes DENTINGER	PHILIPPS, Agatha (Dentir PHILIPPS, Maria Cathari	
* DENTINGER, Joannes George	17310	06 Apr 1767	24 Jun 1847	3480	Johannes Michael DENTINGER	AMAN, Maria Margaretha DENTINGER, Theresia (I	
* DENTINGER, Joannes Henric	2168	c ___ 1713	03 Aug 1753	2166	Johannes Michael DENTINGER	SCHENCK, Maria Eva (De KLÜPSEL, Kunigunda (I	
* DENTINGER, Joannes Henric	17894	20 Oct 1741	b ___ May 1815	2168	Joannes Henric DENTINGER	KLÜPSEL, Kunigunda (De PHILIPPS, Anna Maria (
* DENTINGER, Joannes Jacob	2163	14 Aug 1741	08 Apr 1761	2016	Franz Joseph DENTINGER	PHILIPPS, Margaretha (D	
* DENTINGER, Joannes Jacob	1754	16 Mar 1753	10 Jul 1833	1944	Johannes Jacob DENTINGER	BEIL, Maria Catharina (De BALL, Maria Anna (Dent	
* DENTINGER, Joannes Marcus	16993	25 Apr 1850		3120	Michael DENTINGER	WACKERMANN, Maria Ma	
* DENTINGER, Joannes Michael	3501	22 Jun 1747	06 Apr 1750	3480	Johannes Michael DENTINGER	FIX, Eva (Dentinger) (348	
* DENTINGER, Joannes Philip	3518	08 Nov 1716	10 Nov 1716	3458	Joannes Jacob DENTINGER	PHILIPPS, Maria Catharina	
* DENTINGER, Joannes Valentin	9190	31 Mar 1756		2194	Mathias DENTINGER	PHILIPPS, Anna Maria (De	
* DENTINGER, John	33506	c ___ 1841		33503	Benjamin DENTINGER	, Ann (33504)	
* DENTINGER, John	32249	c ___ 1869		32244	Fred DENTINGER	, Eliza? (32245)	

Another one of my current favorites is a search of all events with a specific source citation. This allows me to determine what I've already extracted from a particular film. I do this by using a filtered group in the List of Events Report. I've saved this filter as "source abbreviation contains a specific word" and it's set up using the [?] value so I can use it to search for multiple sources.

Report Definition Screen - List of Events

Configuration name: List of Events

Subject(s) of the report :

☐ Events associated with:

☒ Filtered group: source abbreviation contains specific word

Report Filter

Save Filter As: source abbreviation contains specific word

For Example: Events happened in 1845

*	Field	Subfield	Operator	Value	Connect
(Any Citation...	Src Abbrevia	Contains	[?]	END

Searching for an abbreviation which contains "St. Louis", I was able to quickly find all the events I'd extracted for the St. Louis Catholic Church in Buffalo, NY.

Date-----	Tag Type--	Print Last, Given-----	City-----	State-----	P1_ID-
28 Oct 1841	Marriage	Age, Cicero	Buffalo	New York	763
20 Oct 1841	Birth	Amann, Francis			17213
7 Nov 1841	Baptism	Amann, Francis	Buffalo	New York	17213
25 Oct 1841	Birth	Ambs, Catherine			21905
27 Oct 1841	Baptism	Ambs, Catherine	Buffalo	New York	21905
28 Oct 1841	Death	Ambs, Catherine			21905
28 Oct 1841	Burial	Ambs, Catherine			21905
9 Feb 1847	Birth	Ambs, Joseph			21908
10 Feb 1847	Baptism	Ambs, Joseph	Buffalo	New York	21908
	Research N	Ambs, Joseph			21631
8 Jan 1840	Birth	Ambs, Maria	Buffalo	New York	11061
12 Jan 1840	Baptism	Ambs, Maria	Buffalo	New York	11061
29 Oct 1837	Birth	Ambs, Maria Catharine			22214
26 Oct 1839	Death	Ambs, Maria Catharine			22214
27 Oct 1839	Burial	Ambs, Maria Catharine			22214
2 Nov 1837	Baptism	Ambs, Maria Catharine	Buffalo	New York	22214
14 Oct 1840	Birth	Andres, Jacob			21904
26 Dec 1840	Baptism	Andres, Jacob	Buffalo	New York	21904
5 Jan 1871	Marriage	Argus, Joseph	Buffalo	New York	3403
	Parents	Argus, Joseph			3403
6 Jan 1874	Marriage	Bach, August	Buffalo	New York	17419

Of course, you need to take care both in naming your sources and choosing the abbreviation you search to get the correct results, but you can see how this would work. The report options allow you to modify the output so it can be sorted to fit your needs, this one is by surname and date.

Going back to my favorite Dentinger/Dendinger family.... another search I like is the List of People where I can narrow it down to a specific area the family lived in. I've found these people living all over the US, so I usually try to break down the family into groups to do the research. The following example is handy for searching for obits. Once again I've used the [?] to make it more flexible.

Report Definition Screen - List of People

Configuration name: List of People

Subject(s) of the report : ☐ Use the Current Focus Person

☐ One person: 35891 Donald REDING (35891)

☒ Filtered group: death in county state combination

Report Filter

Save Filter As: death in county state combination

For example: People born in Virginia

* Field	Subfield	Operator	Value	Connect
Death Group...	County	Contains	[?]	AND
Death Group...	State	= Equal	[?]	END

Entering Seneca for the county and Ohio for the state gives me the following report (sorted by death date). Including parents and spouse names helps to verify that I have the correct person. Now I have everything I need to search for the obits!

List of people who died in Seneca County, Ohio

Name-----	Death Date-----	Death City-----	ID num	Father-----	Mother-----	Spouse-----
Willman, Magdalena	16 Feb 1879	near West Lodi	33362	Willman, Barnabus	Schutt, Catherine	Ferdinand Dendinger
Philipps, Frederick	13 Nov 1889	Bloom Township	36962	Philipps, Louis	Falter, Christena	
Weishart, Josephine	15 Dec 1889	Reed Township	25992			Ferdinand Dendinger
Dentinger, Roman Jos	11 Sep 1893		33383	Dentinger, Joseph	Meiser, Katie	
Meiser, Katie	1 Nov 1893	Thompson Townsh	33378			Joseph Dentinger
Philipps, Frank Loui	5 Nov 1893	St. Stephen	27177	Philipps, Jacob	Seifert, Mary	
Ball, Jacob Joseph	7 Nov 1898	Tiffin	32978	Ball, Francis	(--?--), Johanna	
Philipps, Helen	19 Dec 1899	Venice Township	27139	Philipps, Jean	Cross, Catherine	
Dentinger, Ferdinand	15 Oct 1902	Tiffin	17662	Dentinger, George	Philipps, Barbe	Magdalena Willman
Hammer, Anna	19 Jan 1911	Tiffin	33840			Ferdinand Dendinger
Dentinger, Mary Loue	1 Nov 1911	Reed Township	37206	Dentinger, Theodore	Marx, Nellie F	
Booth, infant female	18 Jul 1918	Tiffin	37208	Booth, William G.	Dentinger, Martha	
Philipps, Joseph	28 Jan 1919	Tiffin	27133	Philipps, Jean	Cross, Catherine	
Philipps, Joseph	31 Jan 1919		36812			Maria Angelina Stein
Laux, Mary Magdalena	21 Jun 1919	Bloom Township	33384			Joseph Dentinger
Dentinger, Rosa	18 Oct 1922	Tiffin	33337	Dentinger, Ferdinand	Weishart, Josephine	Herman Jos. Seitz
Dentinger, Edward	19 Aug 1923	Scipio Township	33375	Dentinger, John	Ball, Mary	
Philipps, Mary Rose	27 Sep 1926	Fostoria	27135	Philipps, Jean	Cross, Catherine	Frank A. Falter
Philipps, Martin	6 Oct 1926	St. Stephen	27134	Philipps, Jean	Cross, Catherine	
Philipps, Louis	19 Nov 1926	Tiffin	27132	Philipps, Jean	Cross, Catherine	Christena Falter

I can use this same type of filter to create a List of People to search for in the Ohio Death Certificates at www.search.labs.familysearch.org by adding search arguments to limit the date of death to the range of available certificates (1908-1952) and sorting the output by surname.

Report Definition Screen - List of People

Configuration name: List of People

Subject(s) of the report : ☐ Use the Current Focus Person

☐ One person: 35891 Donald REDING (35891)

☒ Filtered group: death in oh for lds online death certs

Report Filter

Save Filter As: death in oh for lds online death certs

For example: People born in Virginia

* Field	Subfield	Operator	Value	Connect
Death Group...	State	Contains	OHIO	AND
Death...	Year	> Is gre	1908	AND
Death...	Year	< Is less	1954	AND
Death...	Max Surety I	< Is less	3	END

I included the last line (Death DATE Surety < 3) to limit the results to those people for whom I haven't already located and entered the OH death cert.

List of people who died in OH between 1908 and 1953

Name-----	Death Date----	Death City-----	ID num	Father-----	Mother-----	Spouse-----
Dendinger, Fred	10 Feb 1933	Lyme Township	25984	Dendinger, Ferdinand	Mayer, Marguerithe	Mary Pfifer
Dendinger, Peter	14 Jun 1944	Adams Twp	32987	Dendinger, Fred	Pfifer, Mary	Bessie Hepperly
Dendinger, Susan F	18 Jul 1942	Tiffin	33365	Dendinger, John	Ball, Mary	Frank Gates
Dentinger, Caroline	14 May 1925	Bellevue	33390	Dendinger, Ferdinand	Willman, Magdalena	John Michael Reinhar
Dentinger, Joseph	15 Mar 1944		33369	Dendinger, Ferdinand	Willman, Magdalena	Mary Magdalena Laux
Dice, Frank J	26 Mar 1953	Republic	33692			Maude D Dentinger
Hagan, Francis Mehan	5 Jul 1945	Steubenville	24893	Hagan, Charles	Wernet, Mary Elizabe	Cecilia Eberhard
Hammer, Anna	19 Jan 1911	Tiffin	33840			Ferdinand Dendinger
Helmsing, Pearl Loui	19 May 1934	Cincinnati	35543			Leslie Erlanger Spah
Little, Anna	19 Dec 1950	Hanover Townshi	24752	Little, Mitchell Rob	Wernet, Margaret E.	Paul Lowry
Mayer, Marguerithe	a 1850		17663	Mayer, Joseph Bernar	Wagatha, Anne Marie	Ferdinand Dendinger
Philipps, Albert Leo	21 Mar 1951	Shelby	27174	Philipps, Jacob	Seifert, Mary	
Philipps, Anna	26 Mar 1944	Tiffin	27138	Philipps, Jean	Cross, Catherine	Daniel Unser
Philipps, Emil Jacob	29 Aug 1952	Columbus	27173	Philipps, Jacob	Seifert, Mary	
Philipps, Fannie	23 Apr 1940	Tiffin	27137	Philipps, Jean	Cross, Catherine	Philip Steinmetz
Philipps, Jacob	8 Jun 1930	Tiffin	27136	Philipps, Jean	Cross, Catherine	Mary Seifert
Philipps, Joseph	28 Jan 1919	Tiffin	27133	Philipps, Jean	Cross, Catherine	
Philipps, Martin	6 Oct 1926	St. Stephen	27134	Philipps, Jean	Cross, Catherine	
Phillips, Ervin	16 Feb 1943	Tiffin	27178	Phillips, Jacob	Seifert, Mary	
Phillips, Joseph	31 Jan 1919		36812			Maria Angelina Stein

This filter could also be written using [?] for each of the values (State and the Beginning and Ending Years) and then the same filter could be used for any of the online death certificates including OH, MO, etc.

Just to complicate things, an alternate means of doing the same thing is to use a List of Events report in which case you would set up the filter like this one:

Report Definition Screen - List of Events

Configuration name: List of Events

Subject(s) of the report :

☐ Events associated with: 35891 Donald REDING (35891)

☒ Filtered group: mo deaths 1910-1923

Report Filter

Save Filter As: mo deaths 1910-1923

For Example: Events happened in 1845

* Field	Subfield	Operator	Value	Connect
Tag Type Group is		Death		AND
State		= Equal	MISSOURI	AND
Date - Year		> Is gre	1909	AND
Date - Year		< Is les	1923	AND
Date Surety		< Is les	3	END

With all the new databases coming on line, you might want to set up a filter to locate all the people who might be in the database so you can attach a copy of the record. This filter will produce a list of people who have registered for the World War I Draft, but I haven't attached a copy of the record to them yet.

Report Definition Screen - List of Events

Configuration name: List of Events

Add Delete

Subject(s) of the report :

☐ Events associated with:

35891 Donald REDING (35891)

☒ Filtered group: ww1 draft reg without exhibit

Add Edit Delete

Report Filter

Save Filter As: ww1 draft reg without exhibit

For Example: Events happened in 1845

*	Field	Subfield	Operator	Value	Connect
	Tag Type...	Label	Contains	WWI	AND
	Number of Exhibits		= Equal	0	END

You can also use filters to create a group of people in the Project Explorer window. Say you have access to one of the many 1880 County Atlases which include biographies for prominent local people. You could run a filter for the Picklist to identify individuals you might find in the book. Then you can work down the names in the Project Explorer, adding a biography tag as you find them in the book. This filter locates males who do not already have a biography tag, who lived in a particular state (to be entered when the filter runs) and who were born between the years of 1780 and 1850 (which would make them the right age to be in the 1880 book).

Filter the Project Explorer

Filter Query by Example

*	Field	Subfield	Operator	Value	Connect
<input type="checkbox"/>	Biography...	# of Tags	= Equal	0	AND
<input type="checkbox"/>	Lived...	State	= Equal	[?]	AND
<input type="checkbox"/>	Birth...	Year	< Is less	1850	AND
<input type="checkbox"/>	Birth...	Year	> Is gre	1780	AND
	SEX		= Equal	M	END

Running the filter for the state of Ohio gave me the following set of people in project explorer

Project Explorer - FILTERED (9 names)

bio needed for specific state

Sort : Surname, Given name, Birth date

	Surname, Given name, Birth date
* DENDINGER, Ferdinand	(17662) (1822-1902)
* DENDINGER, Fred	(25984) (1849-1933)
DENDINGER, Frederick	(25984) (1849-1933)
DENDINGER, Ferdinand	(17662) (1822-1902)
* DIEBOLT, Andrew	(34858) (c1830-1899)
JUNG, Franz	(30680) (1821-)
* JUNG, Ignatz	(30680) (1821-)
* LEHMAN, Johannas	(36076) (1802-1856)
* SCHINDLER, Christian	(3333) (1814-1855)

And to wrap it up.... here's my most unique use of a filter so far, just created today. I found a death notice for a John S. Dentinger, husband of Minnie Koehler, which listed his siblings as Mrs. Edward Zeis, Daniel Krehler [sic], Mrs. John Reichel, Louis and Joseph Dentinger. I had John and Minnie in my files, but no parents identified for John. The obvious thing is to see if I have a Zeis or Reichel in the files – no luck there. The obit didn't provide the given names of his sisters. There are a ton of Louis, Joseph and John Dentingers in my tree so I needed a quick way to locate a family which had sons by all three names. So, I ran a List of People report with a filter to locate Dendinger/Dentinger men who were the father of John, Louis/Ludwig and Joseph.

* Field	Subfield	Operator	Value	Connect
<input type="checkbox"/> Son's Name Group...	Given Name	Contains	JOSEPH	AND
<input type="checkbox"/> Son's Name Group...	Given Name	Contains	JOHN	AND
<input type="checkbox"/> Son's Name Group...	Given Name	Contains	LOUIS LUDWIG	AND
Surname		Is like	DEN*INGER	END

It was a snap and using it I quickly found two potential families (the 2nd and 3rd lines are husband and wife).

Name-----	Death Date-----	Death City-----	ID num	Father-----	Mother-----	Spouse-----
Dentinger, François	11 Nov 1913	Rochester	4301	Dentinger, Franz Xav	Strasser, Magdalena	Ottilia Kerner
Dentinger, Ludwig	20 Feb 1890	Mankato	23532			Catherine Meyer
Meyer, Catherine	29 Jun 1914	Mankato	23533			Ludwig Dentinger

Many unique fields are available for use in the filters. My suggestion is to take a look at them, play with some of the fields, subfields, operators and values so you get an idea how to use them. Look at the results of your search and tweak the filter criteria until you get what you want. And then start thinking of filters whenever you need to locate some information from within TMG. Remember, the more you use the filters, the easier they will be to use.