

- ① **Enabling Sources** – you enable Source notes by choosing to use Footnotes or Endnotes. In narrative reports, you can also choose to have them embedded in the text.

Once Sources are enabled, a number of useful options are available:

- ② **Unique Endnotes** – are available if you choose Endnotes. With *Unique Endnotes*, if an endnote would be exactly the same as any previous endnote, it is not repeated, and the reference number refers to the previous instance of that note.
- ③ **Name Sources** – may be included. If they are, their reference numbers for the Primary Name Tag appear immediately after the first mention of the person's name.
- ④ **Relationship Sources** – may be included as well. If they are, their reference numbers appear immediately after those for the Primary Name. Since they cannot readily be distinguished from those for the Name, and often refer to the same Sources, many users find this option produces confusing results.
- ⑤ **Ibid.** – replaces a note with “Ibid.” when it refers to the same Source as the previous footnote. Ibid., short for the Latin *Ibidem*, meaning “the same place,” was once common in formal works but is used less now. There are also controls on the Output Forms tab of the Source Definition screen that control how Ibid. will be used for a given Source, if at all.

- ⑥ **Combine Consecutive Notes** – combines several citations in a single Tag into a single footnote, eliminating the string of note reference numbers that would otherwise occur.

Footnotes, endnotes, and bibliographies are included in reports in slightly different form depending on where the finished report is sent:

- **Screen** – if you send the report to screen the endnotes or footnotes and bibliography you specify are included in the report. Endnotes or footnotes are “live,” meaning they are removed if you delete the note reference numbers in the text, and subsequent notes are renumbered.
- **Printer, or PDF File** – if you send the report directly to your printer, or have it created as a PDF file, the endnotes or footnotes and bibliography you specify are included in the report as plain text.
- **Word Processor or RTF File** – if you have the report created as a word processor or rich text file (RTF), the footnotes or endnotes will be included in the file. They will be encoded using the word processor’s footnote or endnote format, which means that all the automatic functions of the word processor for processing footnotes and endnotes will be available if you edit the file in the word processor. For example, if you delete a note, the remaining notes will be renumbered. If you edit the report so that the pagination is changed, footnotes are relocated to other pages as needed. (Exception: If you use the Unique Endnotes option, the notes are produced as plain text, and the word processor’s note features do not apply.) If bibliographies are specified they will also be included in the file.



TIP

If you create a report containing footnotes or endnotes as a word processor file and do not see them in the word processor, the problem is usually the view setting in the word processor. To have the notes display, change the view to Page Layout, Print Layout, or similar, depending on the version you are using.

- **Text File** – if you have the report created as a text file, source notes can only be embedded in the text. Footnotes and endnotes are not available, nor is a bibliography.

Controlling Formatting

There are a wide variety of controls on the various report Options tabs to control the formatting of the data elements that appear in reports, as well as the page layout itself. For example, options on the Names tab allow names to appear in mixed case or upper case and control the display of identifiers, such as the ID number. The Date and Places tabs allow control of formatting of those elements. The Page Options and Fonts tabs allow control of the page itself. Most of the reports have a Miscellaneous tab which controls options specific to that report type.

The best way to learn about the available options is to scan each of the tabs on the Options screen. If the meaning of any is unclear, click the **Help** button, which leads to a description of each item on the screen.

Chapter 13 – Roles

The **Roles** feature in TMG is a powerful tool for recognizing the various parts individuals played in an event. Roles are a means to specify a person's part in an event and cause screens and reports to reflect that part. In a Marriage tag, for example, one might have persons with the Roles of Bride, Groom, Minister, Maid of Honor, Best Man, and many more.

TMG's Standard Roles

Whether the user notices or not, every person entered in TMG is assigned a Role in every Tag in which they are entered. By default, every person entered as a Principal in a tag is assigned the Role "Principal." Every person entered as a Witness is assigned the Role "Witness."

Some standard tags offer additional Roles. For example, the Marriage tag offers the Roles of "Bride," "Groom," "Best Man," "Bridesmaid," "Mother of the Bride," "Minister," and many more. The first two are essentially duplicates of the standard Principal Role and offer little advantage other than providing a label in certain windows and reports. The others however, can be very useful in accurately describing the roles of those entered as Witnesses to the event.

What Can Roles Do?

Roles provide four separate, but related, functions:

- **Apply descriptive labeling** about the person's part in events in the Person View, the Associates window, and in Family Group Sheet and Individual Narrative reports.
- **Create appropriate text** in narrative reports for the participants playing each part. For example, in a Will Tag, the narrative about the testator would say he or she wrote the will, while the narratives for the executor and the heirs will say they were named executor or heirs, etc.
- **Allow reference by Role name** for each group of participants in the narratives about the others. For example, in a Will Tag, the narrative about the testator might say that he "named the following persons as heirs" and then name them. It might also say that others were witnesses and name them. Likewise, in the narratives about the other participants, such Roles make it easy to create Sentence Structures for one participant that correctly refer to other participants, something difficult to do without the use of Roles.
- **Allow you to create a "library"** of Sentence Structures within a single Tag Type. When you create a Tag to record an event, you can simply choose an appropriate Role for each participant, and the narrative output correctly describes that participant's role in the event. For example, in a Marriage Tag you can create different Sentences for first, second, and third marriages and select the appropriate one by choosing a Role.

When you use Roles, you might use any or all of these functions. But it helps to understand that they are separate, so we can apply them to achieve the results we expect.

Assigning a Role to the Witness automatically assigns the Sentence Structure from that Role so that participant is correctly described in his or her own narrative.

Some Thoughts on Design of Roles

Giving some forethought to exactly how you intend to use the Roles before you create them can improve the chances of quickly obtaining your desired results. The following points may help in designing custom Roles:

- The default “Principal” Role is automatically applied to each person entered in a Tag as a Principal. The default “Witness” Role is automatically applied to each person entered in a Tag as a Witness.
- You cannot apply the “Principal” Role to those entered as Witnesses, nor the “Witness” Role to those entered as Principals.
- Other than the “Principal” and “Witness” Roles, you can apply any Role to any person entered in the Tag, both those entered as Principals and those entered as Witnesses.
- In designing a custom Role, I find it a good practice to decide whether the Role will be assigned to people entered as Principals or Witnesses. Trying to create Roles that can be used for both complicates the design of Sentences and precludes use of some helpful techniques.
- One can use the Role name variables within the Sentences for a Role to refer to the participant with that Role. For example, we might use [R:Heir] here instead of [W] to refer to this heir. There is generally no need to do that, and typing in the longer variables seems to me to invite errors. I recommend using [W] for Roles to be used for Witnesses and [P] for Roles for Principals unless there is a specific reason to do something else.

The Confusing Term “Witness”

In this example, we use the term “witness” in two different ways. TMG uses the term “Witness” to describe any participant in an event. One or two of them are also called “Principals” and are entered in the upper-left corner of the Tag Entry screen. Everyone else is called an “Other Witness,” or more commonly, just a “Witness.” The Other Witnesses are entered in the Witness area of the Tag Entry screen, as shown in the outlined box below in the screenshot on the next page.

People entered as Witnesses may be witnesses in the ordinary sense, meaning they witnessed the event, such as our witnesses to the signing of the will. They may be associated with the event in another way, such as our executor or heirs. In the screenshot on the next page, we see five people entered as Other Witnesses in TMG terms, meaning they are not Principals (there is one Principal in this example, entered at the top left of the screen). Of the Other Witnesses, only the first two are assigned the Role of “Witness,” meaning that they actually witnessed the signing of the will. A third Other Witness is assigned the Role of “Executor.” Two more persons entered as Other Witnesses are assigned the Role of “Heir.” Note the label “5 more

witnesses” above the Witness field, which tells us that five persons have been entered as Other Witnesses (“more” meaning in addition to the Principals).

The screenshot shows the 'Tag Entry' window with the following details:

- Tag type:** Will
- Principal:** 5 (John JONES)
- Principal:** 0
- Date:** 03 Mar 1853
- Sort date:** 03 Mar 1853
- Place style:** U.S. Standard Place
- Address fields:** Addressee, Detail, City, County, State
- Location fields:** Country, Postal, Phone, LatLong, Temple
- Witness List:**

Name (Count)	Date	Role
Marvin BLACK (3)	03 Mar 1850	Witness
George WHITE (4)		Witness
Robert JONES (7)		Executor
Mary JONES (6)		Heir
Martha EVENS (8)		Heir
- Other fields:** No citations, 1 2 D P M

More About Using Roles

The discussion of Roles in this chapter is necessarily limited to some general concepts. For examples of other applications, including some that are much more complex, see the sources listed in Appendix A – Other Resources.

- **“Not Married” Couples** – users with a number of couples in their data who had significant relationships but were not married sometimes create a custom Tag Type called “Liaison,” “Partners,” or the like to record a relationship other than a formal marriage.
- **Standardized Names** – those with ancestors that changed the spelling of their surnames several times sometimes find it difficult to find a particular person in their Project when they cannot recall which spelling was used by a particular generation. By adding to each person who used an alternate spelling a Name-Standard tag with a standardized spelling, the person can be found by that spelling regardless of the spelling used in the primary Name Tag. Generally this Tag Type would be omitted from reports.

Creating a Custom Tag Type

Tag Types are created by using the **Tools > Master Tag Type List** menu command to open the Master Tag Type List. On that screen, click the **Add** button to open the Tag Type Definition screen:

In this example, we are creating an “alt” birth Tag to record information about births that conflicts with data from other sources. We complete four entries on the General tab:

- 1 **Tag Group** – is probably the most often missed entry. By default, the new Tag Type is assigned the same group as the Tag Type that was selected when we clicked **Add** in the Master Tag Type List. If we select an incorrect group the Tags we create will not function

as we expect. For example, custom name Tags must be in the Name group, or you cannot create a functioning name with them. Tags in the Birth, Marriage, Death, and Burial groups all have special functions and are treated in special ways in various reports.

In this case we choose the Birth group. We want our custom Tag to be in the Birth group so we can change a Birth-alt Tag to a regular Birth Tag, and the reverse. We might want to do that if we later decide that the data we entered in a Birth-alt Tag is, in fact, more likely correct than what we have entered in the regular Birth Tag. You cannot change an existing Tag of one type to another type unless they are in the same group.

Note: It is important that the correct group be selected before you click **OK** because the group cannot be changed after the Tag Type is created. Changing the group after the Tag Type is created requires deleting that Tag Type and creating a new one. All fields other than the group can be edited later if desired.

- ② **Label** – can be whatever we want, but consider that it will be listed alphabetically in the Tag Type List when we add a new Tag, and we want to be able to find it easily. The Label also appears in the Type column of the Person view when a Tag of this type is created, so we want the label to be meaningful but not too long to fit in that column. Finally, the Label appears in the Family Group Sheet and Individual Detail reports, so we want it to be meaningful there. Here we have entered “Birth-alt” as the Label.
- ③ **Past Tense** – is used in the list of children in the Journal report to create the brief statement about the child’s events. We have entered “born” as the Past tense.
- ④ **Abbreviation** – is used to identify the Tag in charts such as the Pedigree, where space is limited. We have entered “b.” as the Abbreviation.
- ⑤ **Tag Label Color** – can be used to “color code” Tags of this type in the Tag Box in the Person View and the Associates window. To apply a color, select “Custom” and choose colors for the text and background with the two buttons at the right.

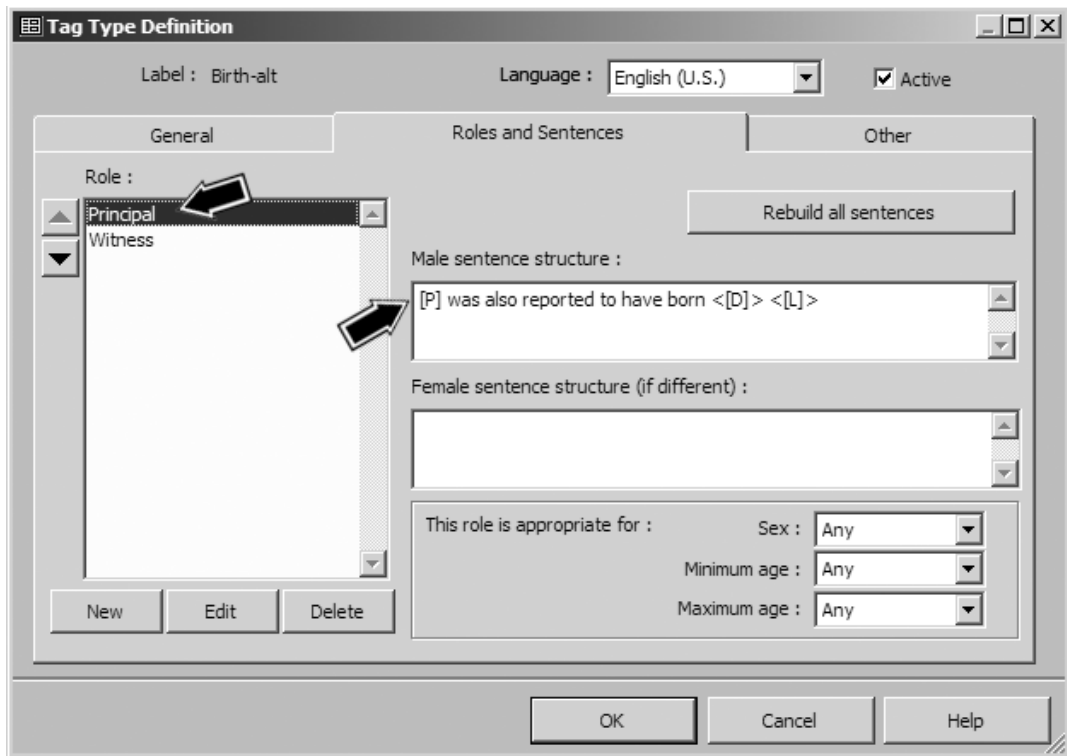
Adding Roles and Sentences

If you are sure you will never want to create narrative style reports, you can ignore the Roles and Sentences tab of the Tag Type Definition. But if you think you might want to eventually use that report style, it is good to create Sentences for your custom Tag Type. By establishing the Sentence initially, as you create Tags of this type you can enter data that will produce the expected output. (You must be using the Advanced Data Entry mode to use Sentences.)

Sentences and Roles are entered on the Sentences and Roles tab of the Tag Type Definition screen, as shown in the screenshot on the facing page.

First, we make sure the Principal Role is selected, and enter a Sentence for the Principal. Generally, there is no need for a separate Female Sentence, but if we were using any words that would be different for males and females, such as “he” and “she” or “executor” and “executrix,” we would also enter a Female Sentence. (See Chapter 11 – Working with Sentences, for information on how to construct Sentences.)

In this case we do not intend to use the Witness feature for this Tag Type, so we do not create a Sentence for that Role. If we did plan to enter Witnesses, we would select Witness in the Role list and also enter a Sentence for Witnesses. (Witnesses are discussed in Chapter 12 – Witnesses.)



If we wanted to create any custom Roles, we could also create them and add Sentences for them as well. (Custom Roles are discussed in Chapter 13 – Roles.)

Adding a Reminder

We may want to create a “hint” on how to use our custom Tag Type that will appear in the Reminder window when we create a Tag of this type (see page 35). Do that by entering the text of the reminder in the Reminder field on the Other tab of the Report Definition screen, as shown in the screenshot on the following page.

Here we have added a Reminder that we are to enter a Sort Date for our Birth-alt Tags so they will appear after the regular Birth Tags in the Person View and in reports.

The other options on this tab can generally be left at their default settings.