

# Searching and Grouping in Ultimate Family Tree

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Presented by the  
**ROOTS Users Group of Arlington, Virginia**

Dick Cleaveland

**Hello, this is a presentation on Searching and Grouping in Ultimate Family Tree, presented by the ROOTS Users Group of Arlington, Virginia.**

**We will demonstrate with version 3.0 of UFT.**

**My name is Dick Cleaveland**

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### Navigating....

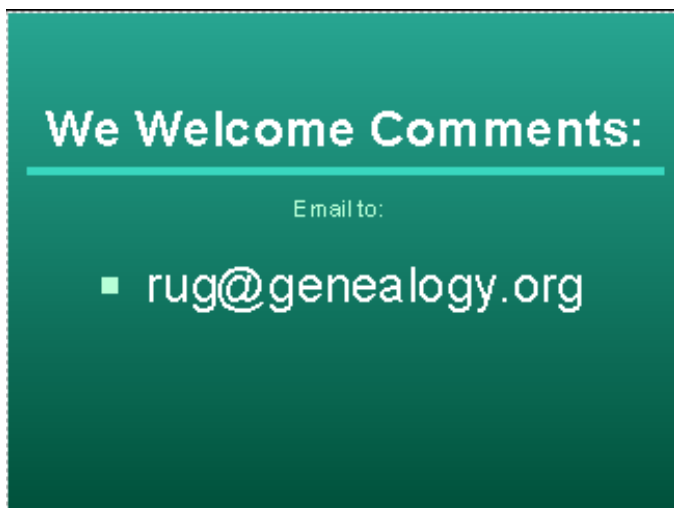
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Next slide	Page Down
First slide	
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Back track	Escape
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Next transition	Space
Stop sound	Enter
Repeat sound	Home
Increase volume	+
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Find highlighter	Ctrl-F
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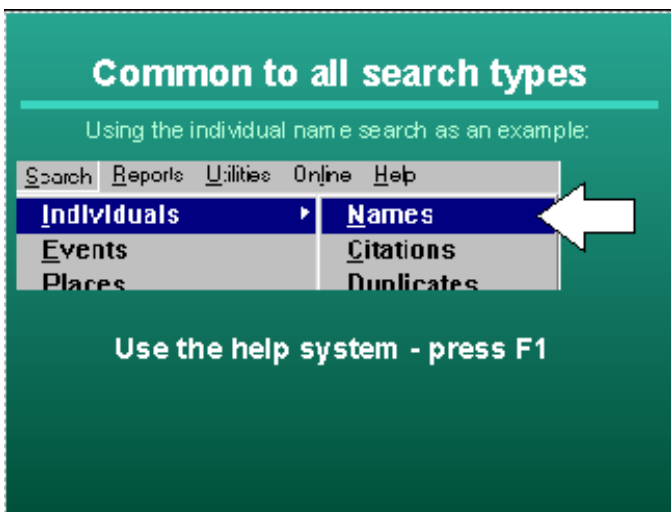
During the show  
Right-click to see these options and pause at the end of the current slide.

Hint: Tab is the same as Ctrl+G

**If you are watching this show from a Compact Disk on your computer, here are some things you can do if you wish to pause, repeat or move around in the presentation.**

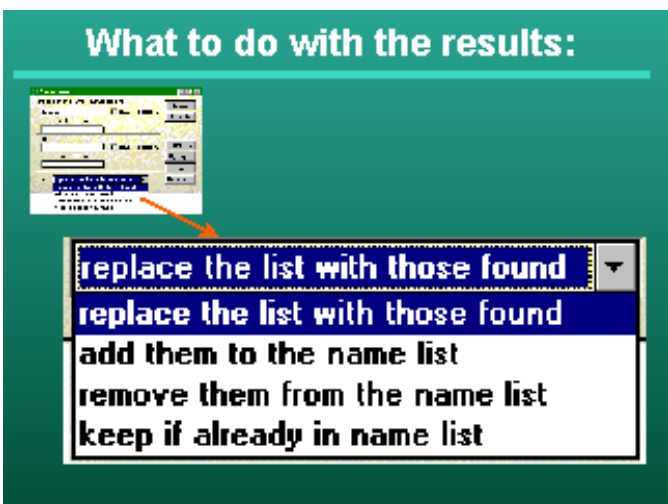


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There are many different routines available for searching. These different routines have certain elements in common. We'll use the Individual Name search to illustrate these common elements.

In this presentation we cannot possibly cover all of the details of the subject. On any of the screens you may use in UFT if you press the F1 function key you will get very valuable help on the feature you are using.



One of the first things you must think about when you are about to do a search is what to do with the results or the search. Down at the bottom of each search form is a list that expands and gives you the options to replace the list with those found, add them to the list, remove them from the list, or keep them if they are already on the list. Since a list with no one on it already exists, be sure to start out using the "replace the list with those found" option.

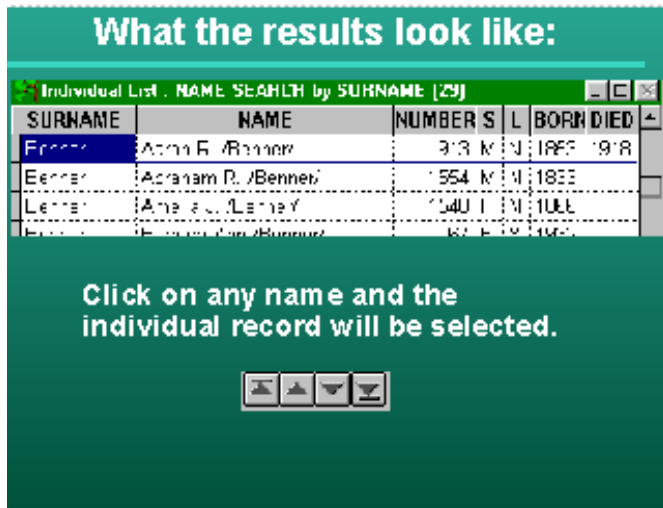
Don't get confused because you see the word NAME in these options, even though you may not be using the name search. Each type of search of individuals results in a different name list. You'll see this later when we talk about GROUPING.



There are several command buttons on the right hand edge of each search form. Close, Search, results, history, Group and Preview.

Close, of course, simply closes the form without doing any searching.

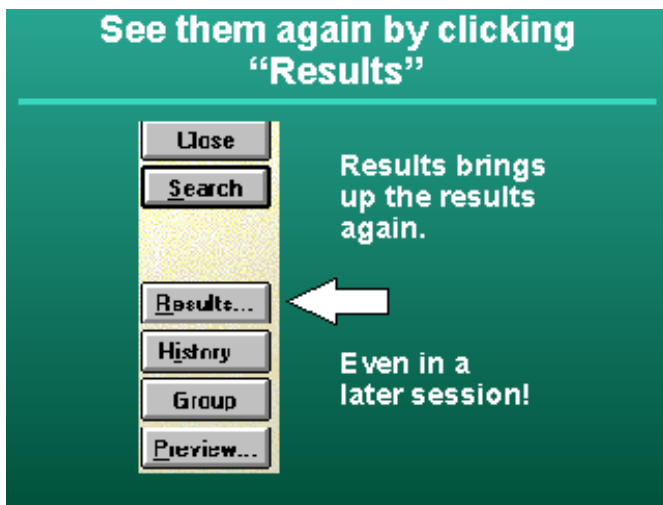
To start the search after filling out the fields and choosing the options in the rest of the form, click on SEARCH or press Alt-S.



Shortly after you select the search command, a results window will appear. It's a list of the individuals which satisfied the parameters of your search.

If you select any one of the entries in this list, such as the one that appears highlighted in the picture, and then move to the individual record window, that person's data will appear there.

While the results list is on your screen you can also use the navigation buttons to move among people on the list.

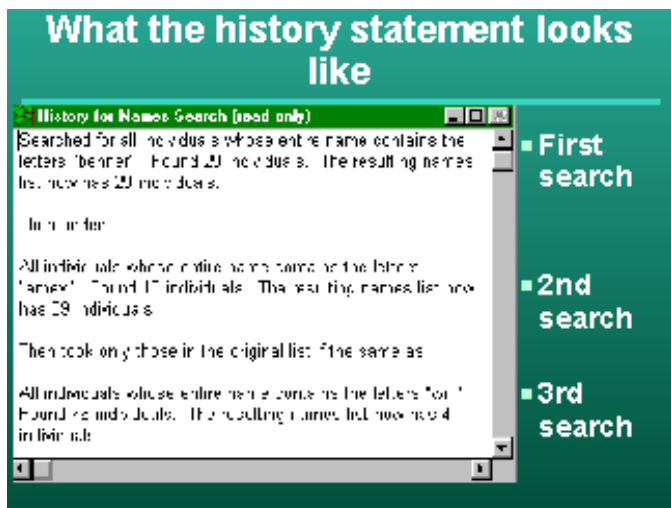


If at some later time you wish to review the results you got on a particular search, just open that search form and click on RESULTS. This works even during a later session.



As you probably have gathered by now, you can conduct several searches in a row on the same data and combine the results in different ways. Establishing a list, adding other items to the list, newly limiting the list to certain items, and so forth. By the time you have done several of these searches it might be good to review the combinations which led to the current results.

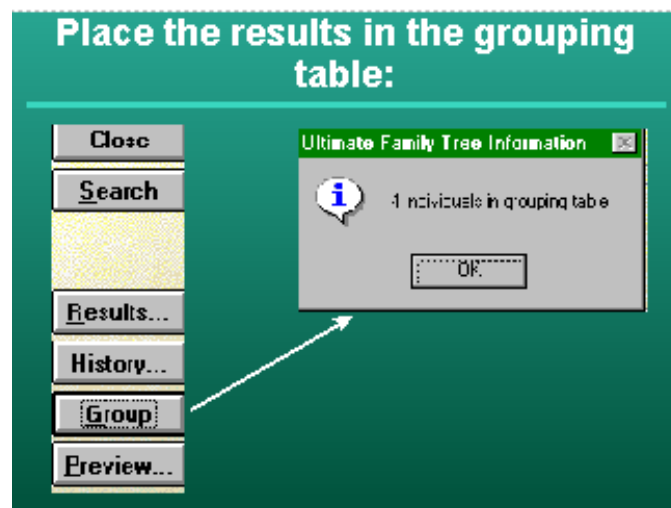
If you click on HISTORY you will find a description of your searches for this list.



For example, this one shows that I searched first for individuals with the name benner - 29 were found -, then added to that list with a search for amey which found ten more individuals making 39 in all.

Then I did another search choosing to keep in the list only those who had the letters W-I-L-L in their names - such as William and Willis. This search showed 76 individuals in the data base with will as part of their name.

But only four of them were in the list I had previously established, so the result list now is of four people.



After you've done a search and have the results you like, you can save the results in the GROUPING TABLE. All you have to do is reach down there and click on GROUP until you see that sign that says so many "individuals in grouping table."



### What is the grouping table?

Srcha	Srchb	Srcha_d	Srchb_d
F	F	F	-
F	F	F	-
F	F	F	-
F	F	F	-
F	F	F	-

Each line is a record, each column a field.

Fields you don't see in the individual record file. Each one is a search result list: "T" for True if that person is in the list, "F" otherwise. The Grouping table is one of these fields.

OK, so you want to know what the **GROUPING TABLE** is about. Well, each of those kinds of searches you can do of individuals - such as the one we just showed of the name search - results in the setting of a field in each of the records in the individual record table in UFT. You never see these fields directly, but here is a picture of a portion of that table as viewed with FoxPro.

Each line shown here is a part of an individual record - the first one may be mine, for instance. Each of the field columns srcha, srchb and so forth correspond to the results of one of the individual search types. Srcha might be the one

for the name search, for instance. The so-called grouping table is just another set of these fields.

When a person is selected in a search, the "F" for false is changed to a "T" for true.

### What is the grouping table for?

- New Projects
- GEDCOMS
- Setting flags
- Record selections
- Reports

You can use the grouping table for several things. First of all, if you are splitting your project you can limit the range of individuals in the new project to those in the grouping table by using the "use list" checkbox. The same thing is true for GEDCOMS you plan to export. You can set flags from it. If you have the results list displayed you can limit the range of motion of the record selector buttons on the toolbar, and when you print reports you can limit them to just those individuals with the "use list" check box.

### Previewing a Search

See what you're going to get before committing to it.

Using Preview you can see the results of this particular search before it affects any preceding searches.

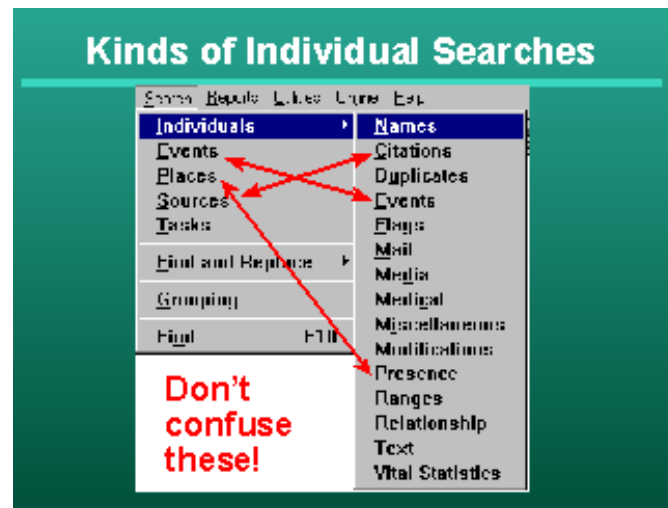
You may want to see what the results of a particular search are going to be before you are actually committed to it. This is especially useful if you have formed a complicated list using "add to list" Keep if already in list and so forth.

You can see what you're going to get by using the **PREVIEW** button.



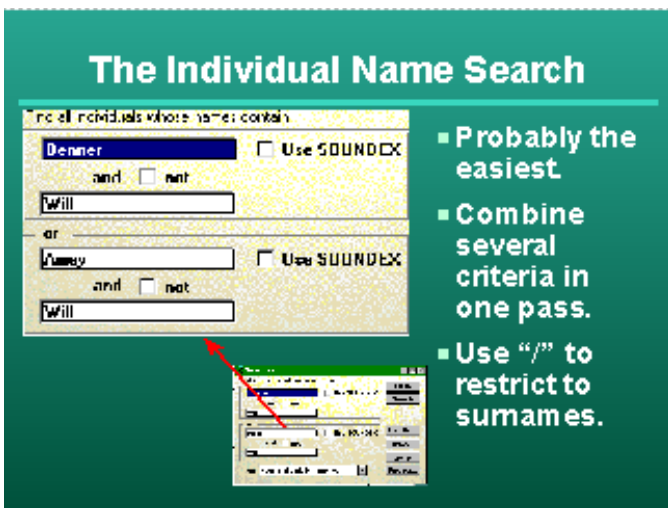
This completes our roundup of the features which are common to all searches.

For the remainder of the presentation we'll limit ourselves to discussing the searches for individuals, events, places, sources, tasks and Grouping.



You can do a lot of different kinds of searches of the individual records in your data base as shown here. The arrowed lines represent areas of possible confusion between individual searches and other kinds of searches. You can search SOURCES, but you can also search individual records for the CITATIONS of those sources. You can search PLACE records, but you can also search individual records for those having PRESENCE at those places for various events. And you can search EVENT records as well as individual records for people having certain events associated with them. In these areas be sure to check out each possibility to

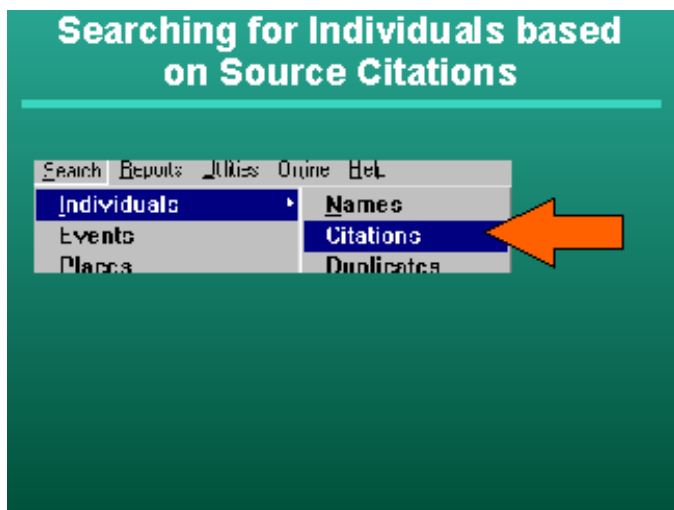
see which search you want to use.



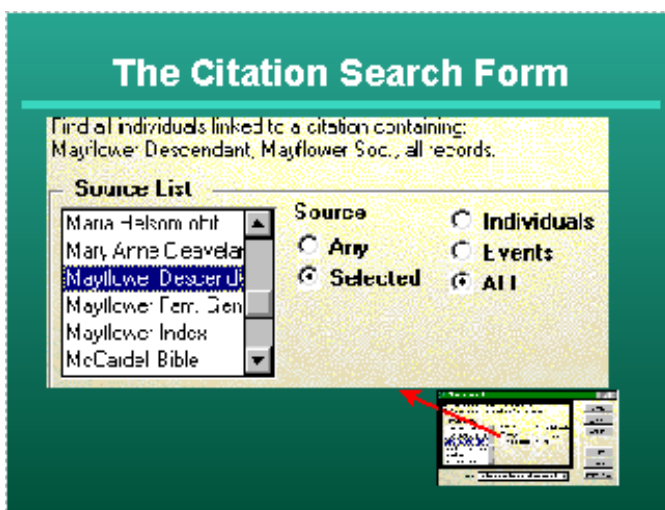
The individual name search is probably the easiest of the bunch. Notice that you can combine several criteria in one pass. The example I showed earlier, where separate searches were made for adding Benner and Amey and then selecting the wills from them could have been done with the setup I have shown here.

If you wish to identify a surname for search so that other names will not be found for that element, use the slash symbols at the beginning or end of the name or both.

The search will work on portions of a name, as the "Will" search indicates.



Next we'll cover searches for individuals based on Source Citations.

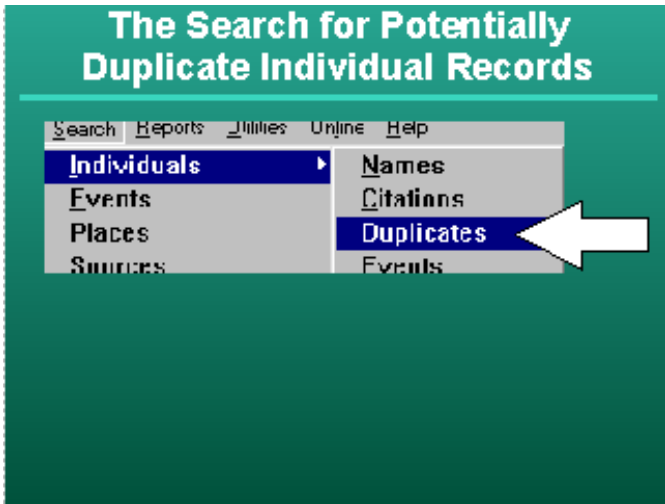


Here's what the citation search form looks like.

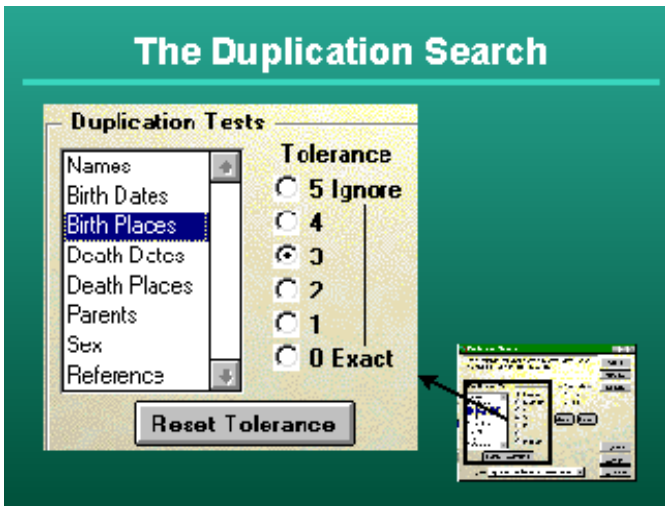
On the left side of the Citation Search Form is a selector list. This is where you can choose the specific source from your library which you wish to use as a criteria. On the other hand, by choosing the radio button "any" you can search for individuals for whom any source was cited.

You can limit your search to either citations in the individual records, event records associated with the individual, or both using the other radio buttons on the form. If you choose events, the search will return all individuals associated with events in which that source was cited - even non-principals.

Here's a trick: If you wish to find out which individuals in your data base have NO source citations, you can find all those who DO and then, using the grouping form we'll talk about later, subtract them from all those in your project and the remainder will be what you want.



After entering a bunch of data from various sources, perhaps even having imported a GEDCOM, you may feel it's possible you have the same person represented in your data more than once. The duplicates search can help you ferret out these cases.



Here's the Duplication Search Form. On the left you will see a pick list of various criteria you can use to see if records match, and the degrees of tolerance for each of them. To gain an understanding of the meanings of these levels of tolerance you must press F1 to see the first help screen and then select "tolerance Levels". Rather than going through each one of the eight tests, which would take a lot of time, I'll show just one - the one for the NAMES test.

### Duplication Search - Names test tolerance levels

- 5 The name test is not used
- 4 The surname SOUNDEX codes and the first character of the given name SOUNDEX codes for the two individuals must match
- 3 The surname SOUNDEX codes and the first 2 characters of the given name SOUNDEX codes for the two individuals must match.
- 2 The surname SOUNDEX codes and the first 3 characters of the given name SOUNDEX codes for the two individuals must match.
- 1 The surname SOUNDEX codes and the given name SOUNDEX codes for the two individuals must match.
- 0 The names of the two individuals must match exactly.

As you scan this list, you can get an idea of what the various tolerance levels are. I should point out that these definitions are copyrighted by The learning Company.

### Duplication Search - Sequencing

- **Next:** One suspected set at a time.
- **All:** Go through the entire data base at once.

You need to decide if you want to look at suspected duplicates one set at a time or to build a list of all possible sets. Until you get familiar with this search I recommend you choose the "next" option.

With this option, when you click on "Again" UFT will search for the first set of suspected duplicates and then stop and present them to you in the form of the usual result list. You can then look at them and decide if you wish to combine them or perhaps just delete one.

### The Individual Events Search

Next we'll explore the Individual Events Search.


### The Individual Events Search Form

- **Event**
- **Place**
- **Dates**
- **Roles**
- **Sure level**

This is a rather busy form. You can select individuals based on what kinds of events they participated in, where those events took place, when they took place, what role they played in the event as well as what sure level you assigned to the evidence for the overall event.



### Choosing the Event

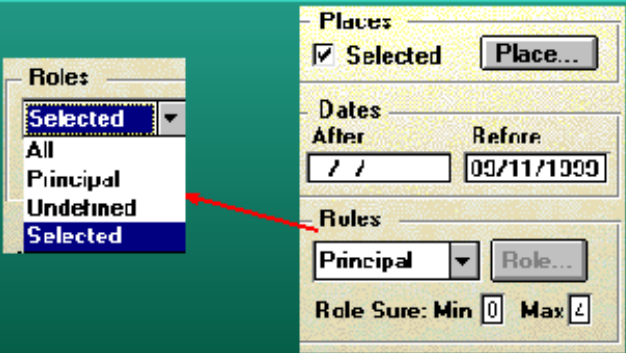


- Select an event or
- Opt for all events.
- Choose an Event Evidence Sure level.

Using the pick list you can choose a particular kind of event for the search or, if you wish, opt to have all events included.

You can limit the range of events considered by specifying the sure levels assigned to the overall event evidence.

### Places, Dates and Roles



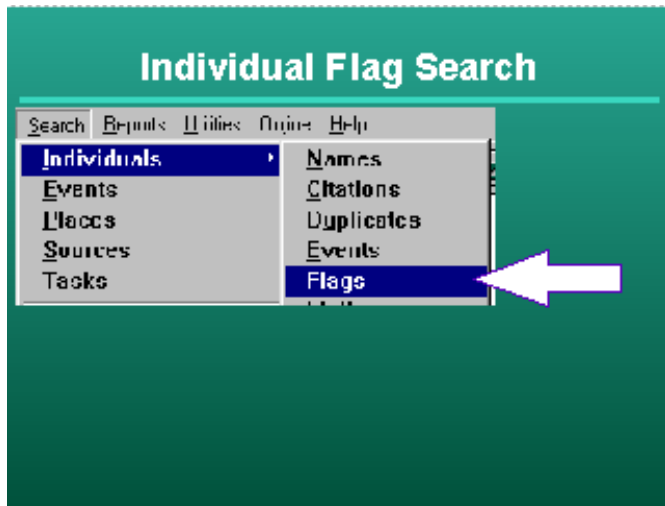
In the Individual Event search form you can specify what events you want considered by identifying the location in which the events must have taken place. You do this by clicking a check mark into the "Selected" box and then clicking on the "Place" button. That'll open up the usual "find place" window where you can make your choice.

You can specify what events will be included by the date of the event by declaring the date range.

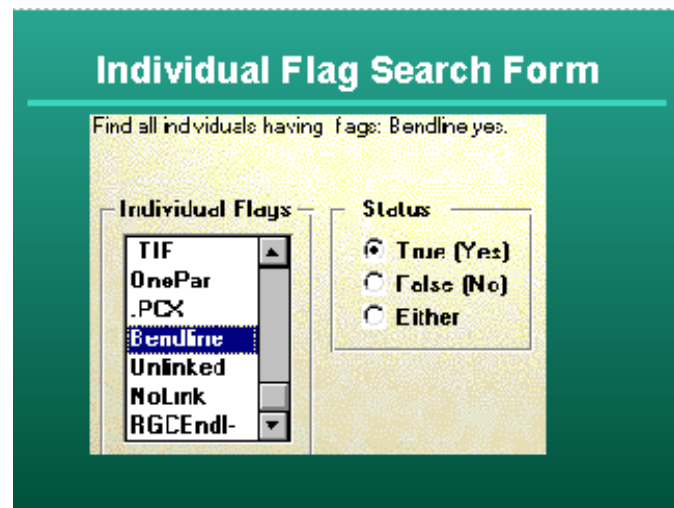
And you can say whether an individual selected could have played any role in the event, a principal role, an undefined role or a specifically selected role. If you choose "selected" then by clicking on the "Role" button you will be presented by a pick list of the roles associated with your event choice.

"Undefined" roles are created when an event is imported from ROOTS III or a gedcom where the event does not correspond with any of the templates in UFT. You can search for events with this undefined role in order to correct this problem.

You can also select what sure value must have been placed on the selected role or roles for the event by identifying the role sure range.



As you probably know, you can identify individuals with flags either through the grouping function (which we'll discuss later) or through use of the individual record miscellaneous screen. We will now look at the capability of searching for individuals marked with these flags.

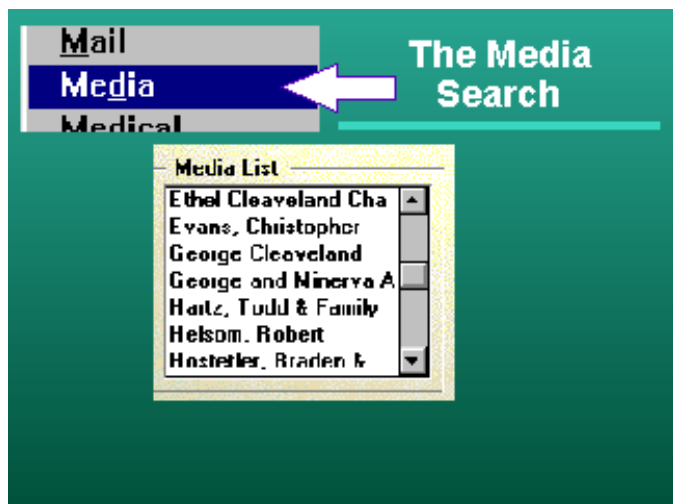


This is one of the simpler search forms. All you have to do is pick the flag you want to search on and then decide if you want those individuals which have the flag as true, false or either.

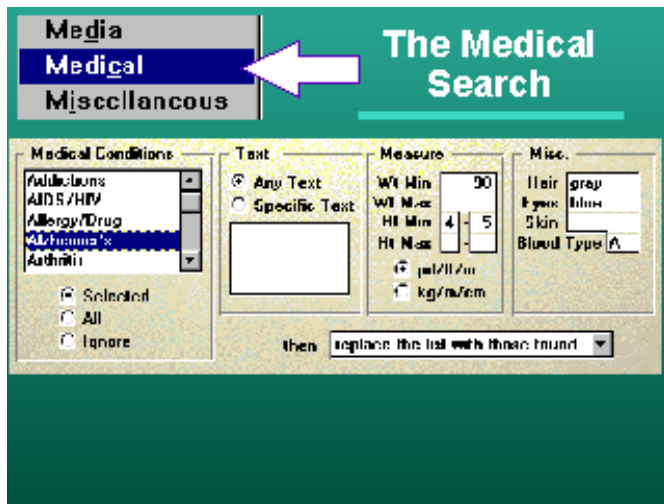
The flag I've selected is the one I've placed on individuals who are at the ends of a family line - those who beg for further research to extend the line. When we get to the end of the presentation, if we have time, I'll describe how to plant that flag.



Here is another relatively simple search form - the search for individuals based upon the mailing label entry in the miscellaneous screen. All you have to do is select the field that you want to search for and put in the criteria.



And another simple one - this one finds those individuals which have specific media linked to them. Just pick out the media identifier, click on Search and you have the list.



Now here's a much busier search form - for various medical and physical characteristics.

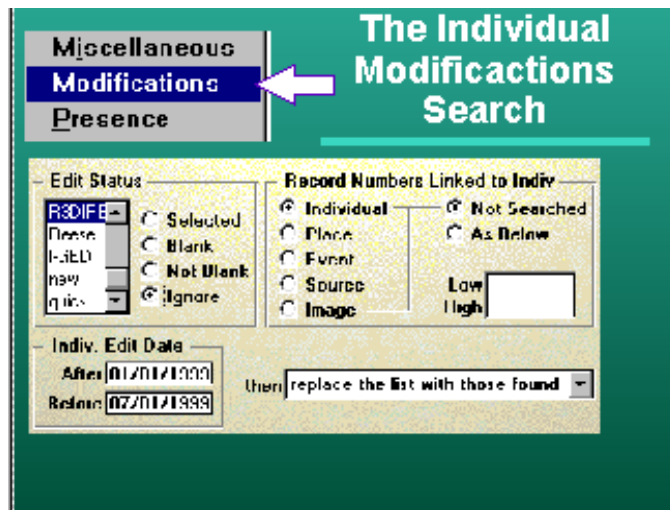
By now it should be obvious to you that you can select either a particular disease or all diseases or ignore them entirely for this search. You can search on any medical text entries that you may have in your data base, and you can specify criteria for weight and height as well as color of hair, eyes and skin and even blood type.

This form will get a lot of use by those people who are searching the genetic background of their family.



For the Miscellaneous search there's a pick list of various fields; the search box is active for you to specify details in those cases where appropriate.

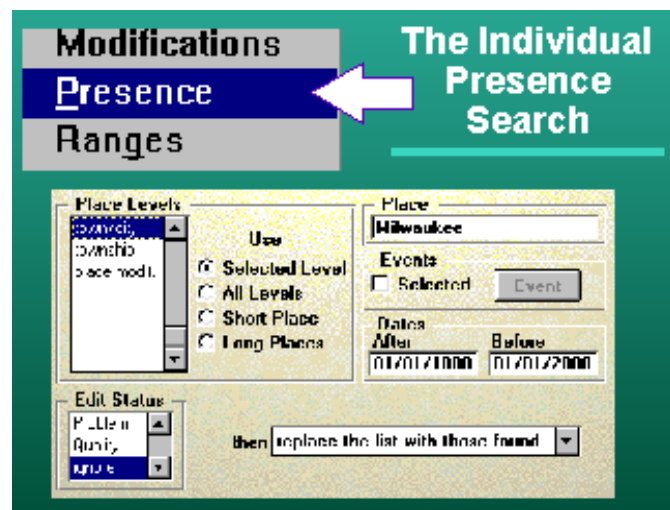




In the Individual Modifications search form you have many options as shown here.

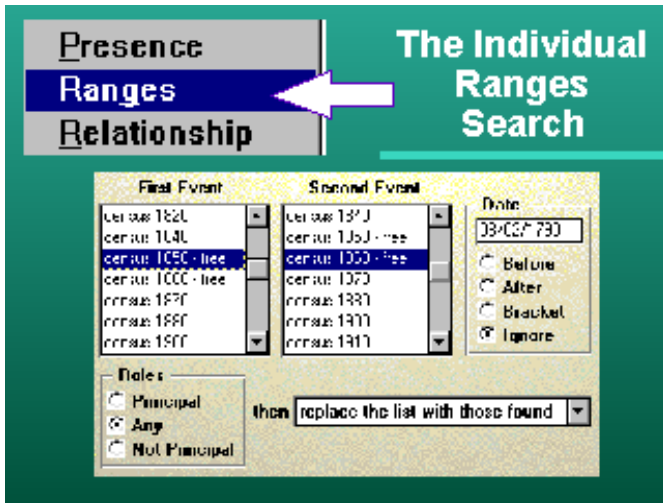
In this particular search I chose to get a list of all individual records edited in the first six months of 1999. The search could have been limited to individual records with a particular status or particular number or linked to particular place, event, source or image record numbers.

This search is especially useful for those cases when you think you might have done something wrong and want to review your work.



Here is the very useful Individual Presence search. You pick a place from your place library and you can find all individuals who were ever reported to be there. Great for preparing for research trips.

You can limit the search by edit status, kinds of events and dates. As an example, if you want to check records in a town, search on birth events in the date range when birth records were kept, then add to the list with another search on death records during the date range when THOSE records were kept, and so forth. Then you can group on the resulting list and print out reports limited to these items.

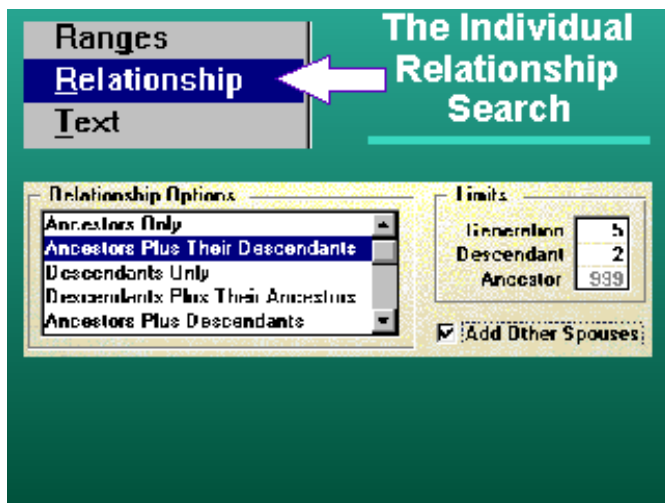


The individual Ranges search is an interesting capability. You can search for individuals based on their participation in both of two event types, specifying the class of role they played if desired and giving a date criteria.

In this example I searched for individuals who I had found in both the 1850 and 1860 census reports.

The "Bracket" option is interesting. If you select both event types as the same and the bracket option, you can find people who had two events of that same type, one before and one after the date specified.

I tried it on the marriage event with a date in 1900 specified and found people who were married more than once - once before AND once after that date.

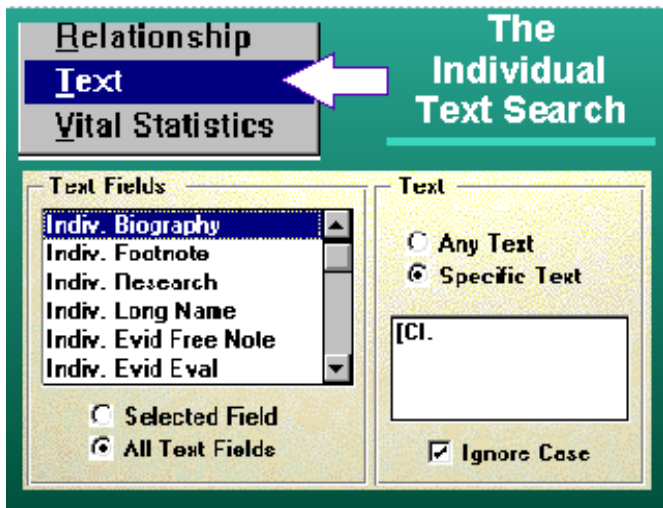


This is probably one of the the most useful searches. When people ask you for information on Aunt Bessie's family, you can use this search with grouping to limit the range of reports to her and her relatives.

The options are fairly obvious except for the limits. The generation limit is in the primary direction you choose - in this case it is 5 generations of ancestors. The other limit is in the opposite direction - in this case it will include descendants only to two generations below each ancestor found. If you choose a descendant option then the descendant limit would be dimmed and the ancestor limit would be active.

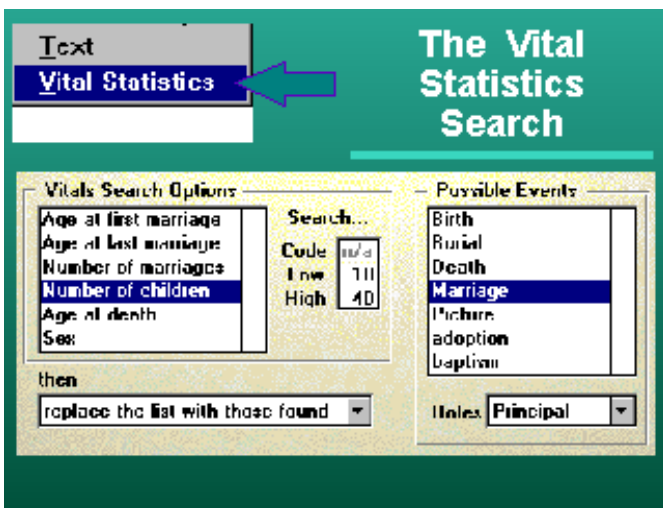
If you choose to add other spouses, it will add the spouses of descendants and other spouses of ancestors. In this case the list would include, for instance, Aunt Bessie's son's wife and her father's other wife, where if that option were not chosen they would not appear.

This search is also useful if you wish to split off a portion of your data base to another project.



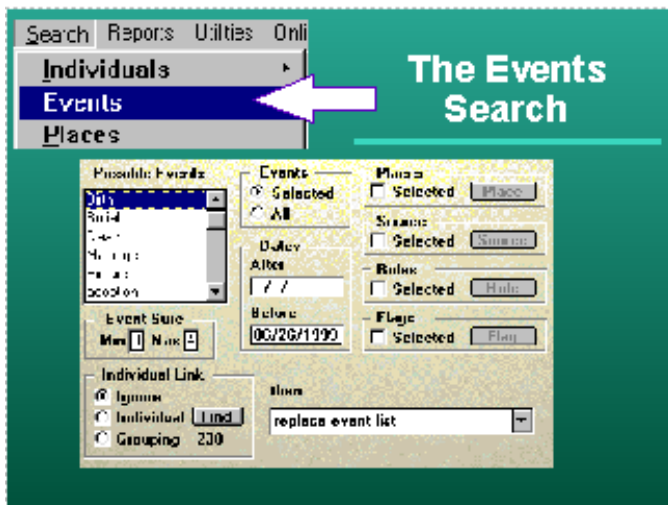
You can search any or all text fields which are linked to individual records with this search form. In this case I was interested in finding all cases where I had placed a source citation in biography fields, so I used one of the symbol sets that surround those citations.

Note that you can find individuals linked to text in regular source citations - the free note field does that. There are a good many other fields which can be searched than shown here.

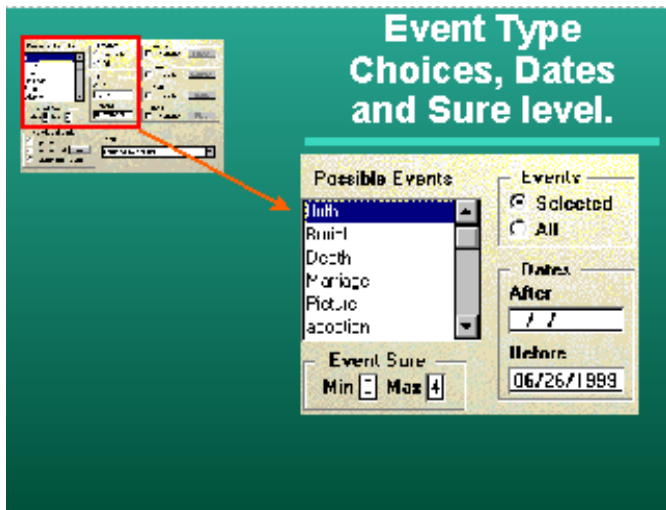


Now we come to the last of the individual search forms. Aside from the Vitals Search Options you see here you can also search for Living, Birth Code, Married, Children, Unrecorded parents, Age at the first of a selected event, and Age at the last of a selected event.

In the example, I have chosen to find out how many people in my data base are shown as having ten or more children. In this case the Possible Events pick list has no meaning.

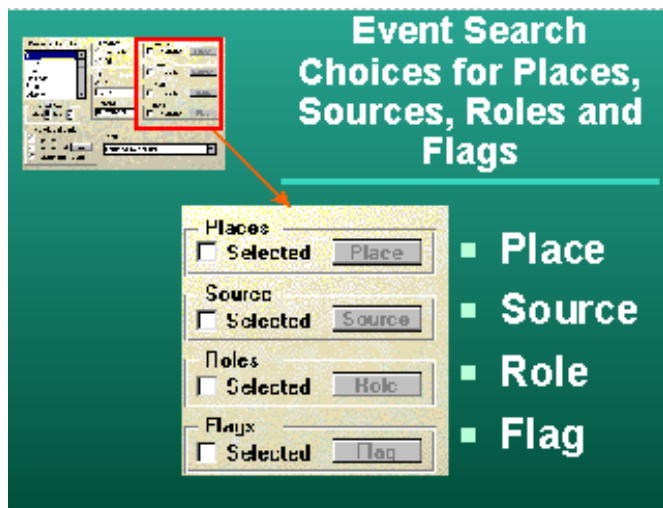


Now we'll look at searching events. Since this form has so many option areas we'll look at individual sections one at a time.

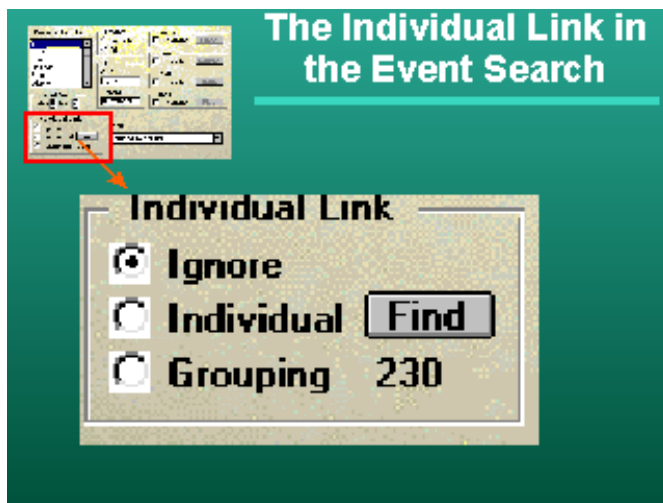


This part of the form allows you to limit the search to particular event types if you wish by using the "Selected" or "All" options and the event type pick list. You can also specify a limiting range of event dates.

The event sure level choice refers to the surety level assigned to the evidence associated with the overall event. Note that if you want to find out what events do not have ANY evidence assigned to them you can search on the range of sureties of 0 to 0.



You've seen all of these items in other searches associated with individuals, so I won't go into them any further except to note that they are more ways to direct the scope of an events search.

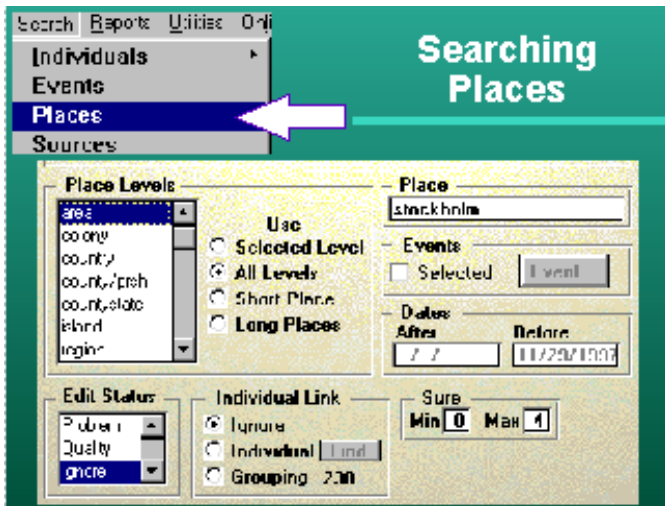


You recall that we can create a group of individuals with any of the Individual Search routines we covered earlier. With this option you can limit the event search to those individuals in that group if you wish.

Notice that the form tells you how many individuals are in the group, should you choose to use it.

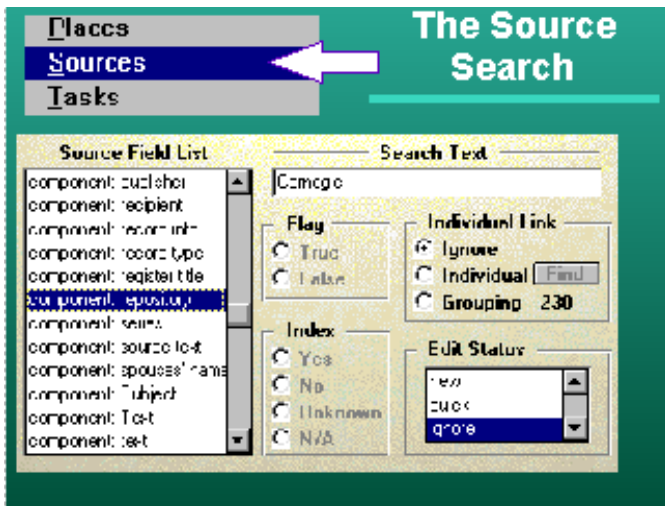
You can also limit the search to a particular individual using the find option, although it would probably be easier to just look at that individual's edit record to find the event of interest.





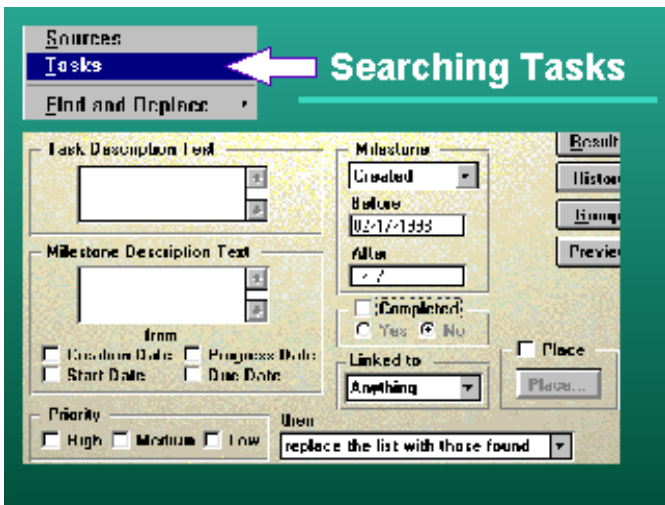
The Place search form has the same kinds of elements you have seen before in other searches. Here you can direct the search in several different ways, all of which should now be familiar to you.

One reason to use the place search is to develop a list of different records referring to the same place, so that they can be combined using the Utilities - Project - Combine - Places feature.

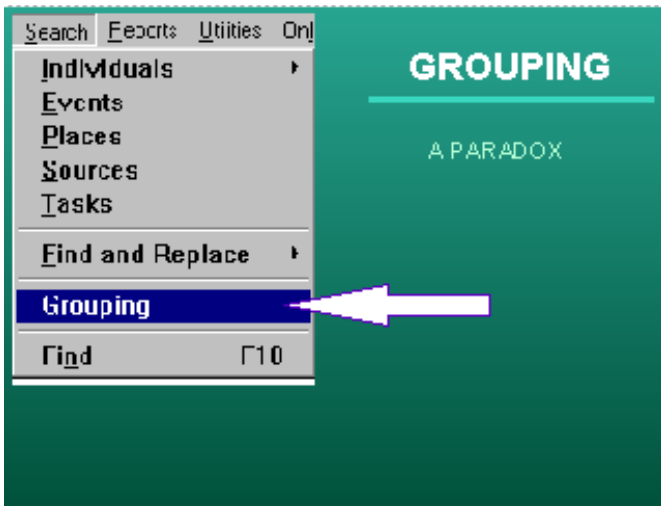


In the pick list associated with the source search form there are a great many items - one for each field in sourcereords. In this example I've chosen the Repository component, looking for sources I found in the Carnegie Library in Bucks County.

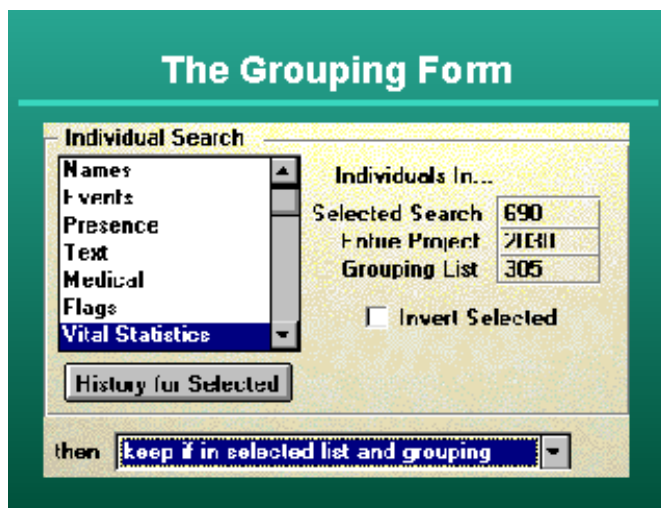
If you choose a flag component the flag option is enabled so you can choose between true and false. Again you can limit the source search to those cited in evidence for an individual or one of the individuals in the group. This includes citations in events linked to the individual as well as in the individual record.



If you use the task feature in working with your data in UFT, you are probably familiar with the terms in this form. You can find tasks containing text items, in ranges of various dates, and linked to any of a number of different record types.



Now we come to the most difficult of all items in the search world, grouping. In most respects it is simple, but for some reason or other many users seem to have great difficulty in grasping the concepts and making good use of the feature.



Here's what the grouping form looks like. The pick list contains a list of all of the different kinds of INDIVIDUAL SEARCHES you can conduct. It tells you how many individuals are in the grouping list at present (305) and how many are in the selected search - 690 are in the vital statistics search. It also reports the number of people in the entire project.

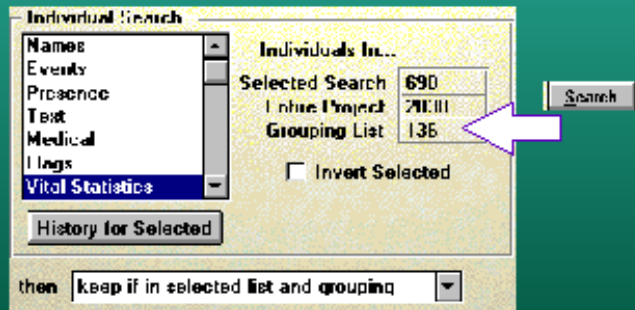
I'm going to illustrate some of the features with an example. I want to put flags on each individual record for people who are ancestors of either myself or my wife and who are end-of line folks - those who we should look at more if

we want to extend our lines.

The first thing I did was to do an individual relationship search with myself as focus and find all my direct ancestors, replacing the relationship list with those found. I got 273 individuals. I then shifted the focus to Barbara and did the same search, this time ADDING those found to the list. I now had 305 individuals. I then clicked on the "grouping" button on that individual search screen to put those 305 individuals into the grouping list - the ones you see identified here on this form.

Next I did a search using the vital statistics form, finding all those people with unrecorded parents, replacing the list with those found.. Now moving to the grouping form, it looks as seen here. Selecting the "keep if in selected list" will give me a list of all our ancestors for whom we have no parent data.

### Finding the End-Of-Line Folks



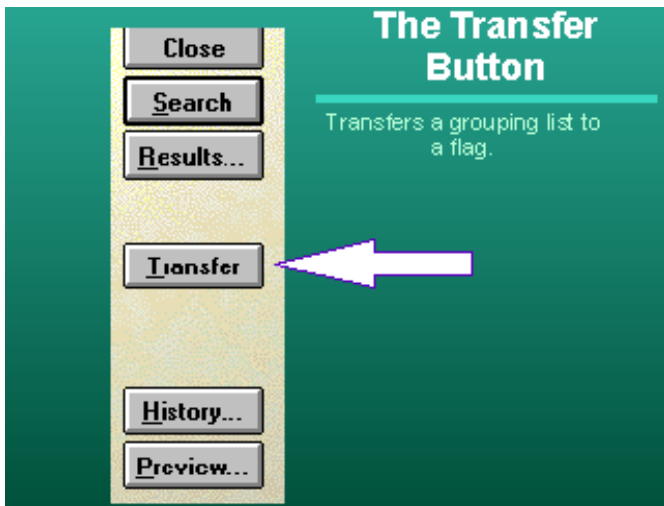
Here's what the form looks like after clicking on "search". You can see that the group has now been reduced to the 136 people who are not only end of line people but also who are Barbara's and my ancestors.

Incidentally, the term "search" is a little misleading. What actually happens is that the program combines the results of a previous search with the grouping list in the way you have specified.

If I wanted a listing of these people I could now choose a list report and limit it to the group. Or

I could use the list as a prompt when entering search information into one of the internet web search facilities. But for now I want to create a flag in the individual records reflecting this status.

### The Transfer Button



There is a new command button on the grouping form - the transfer button. When you click it you are presented with a menu of individual flags you can choose from to mark the individual records in the group.

### The Transfer Menu



With this transfer Grouping menu, you can select which flag you wish to use, and what label you want to use for it. One click on OK and that flag is created for all individuals in the group.



**OK, we're finished now. Just a reminder that what we have covered applies to version 3.0 of UFT. You can get updated information by going to the UFT web site, and you might consider joining our organization; get information at the web site shown.**

**While we have made every attempt to be accurate and fairly complete, it is possible that an error or two has crept into the presentation. If that's the case we apologize but can assume no liability.**

**A reminder: be sure to backup your data base before making any significant changes and after each major editing session.**