

Data Sets

Notes:

1. TMG stores related files within one or projects. It is useful to have a separate project for someone else's family or for special projects otherwise most people will store all their family data within one project.
2. Data can be in 1 or more data sets within the same project. Also data can be grouped into 1 or more focus groups.
3. You can view the data sets either separately or together by enabling/disabling them one at a time (using the dataset manager). The ID numbers will be prefixed by the dataset number.
4. Data sets can be refreshed – but this only works on locked datasets. Once you unlock a data set you can't lock it again. You can view and report on a locked dataset, but can't change anything in it. Useful for datasets that are shared with other people. Datasets can be locked as part of the Import process.
5. Some of the reasons for using multiple data sets are:
 - Collaboration between researchers
 - Use subsets for special reporting purposes
 - Training
 - Split main data set along family lines

Advantages and disadvantages of these are discussed on page 14.

If using subsets for special reporting purposes, consider creating a separate "Special Reports" project just for these datasets. Import each special report data set into the project as they are defined and extracted from your master data set. Save each data set with a memorable name and the date of import.

Creating Datasets:

1. Copying a group of people.

- A new data set must already exist in the same project – it can be created using the dataset manager [File => Data Set Manager] and given a name and description.
- Select the group of people by using the project explorer &/or define them as a focus group.
- Then Add => Copy Person(s) and choose the destination data set.
- Alternately, you can use Edit => Move Person(s) the same way to permanently move a person from one data set to another in the same project.

2. Generate from reports.

- Create a flag to use for the selected group of people.
- Set the flag from the List of People report, using secondary output to change the flag.
- Repeat this process until all required people have the flag set as required.
- Make the new data set using the List of People report, with make new dataset as the secondary output using the flag as a filter.
- [You also have the option to select people for secondary output directly from the project explorer or a focus group using the List of People report.]
- Additionally, this process will allow you to make a new dataset in a new project.
- Use the new dataset to generate special reports as required.

3. Import data into a new data set.

- There is an option to lock a dataset as part of this process.