Using Excel for Genealogy

Video Link

Using Excel for Genealogy can be very helpful in a variety of ways. Most often genealogist use it for correlating evidence such as records found in census, vital records, bibles, military, city directories, and more.

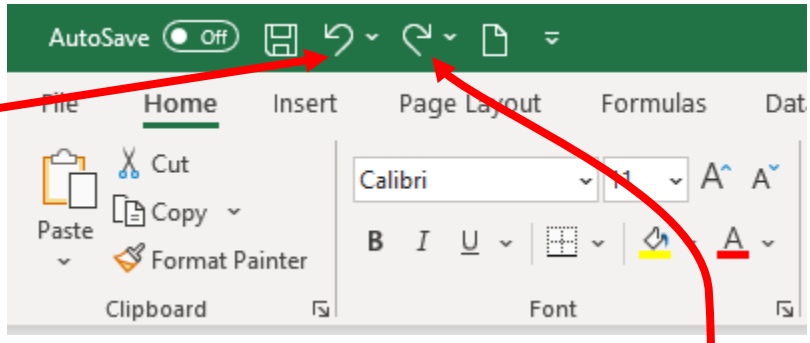
Below is a list of commonly used functions for genealogy. This is demonstrated using Excel for Microsoft Office 365. Older versions of Excel might not have all the same functionality, but much of it will be the same.

SAVE EARLY – SAVE OFTEN!

Start by saving your document to the location where you want this file to reside. Then all you will need to do is hit the save icon that looks like an old-fashioned disc drive.

AutoSave – is for Excel 365 users. It saves to your "OneDrive" Office 365 account if you have one. It does not save to your computer automatically. Therefore, **if you are saving your files to your computer, SAVE EARLY and SAVE OFTEN.**

Oops! I made a Mistake



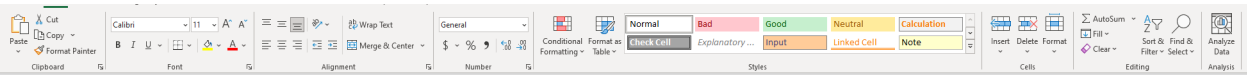
Undo

If you make a mistake and wish to undo your last function, click the undo button as shown or use the short cut code **CNTL+Z** to undo your last item. "By default, Microsoft Excel keeps track of **16** "undo" levels" per Microsoft.

Redo

Redo works the same way as Undo. Even after you have saved your document, Undo and Redo will continue to remember your last 16 entries.

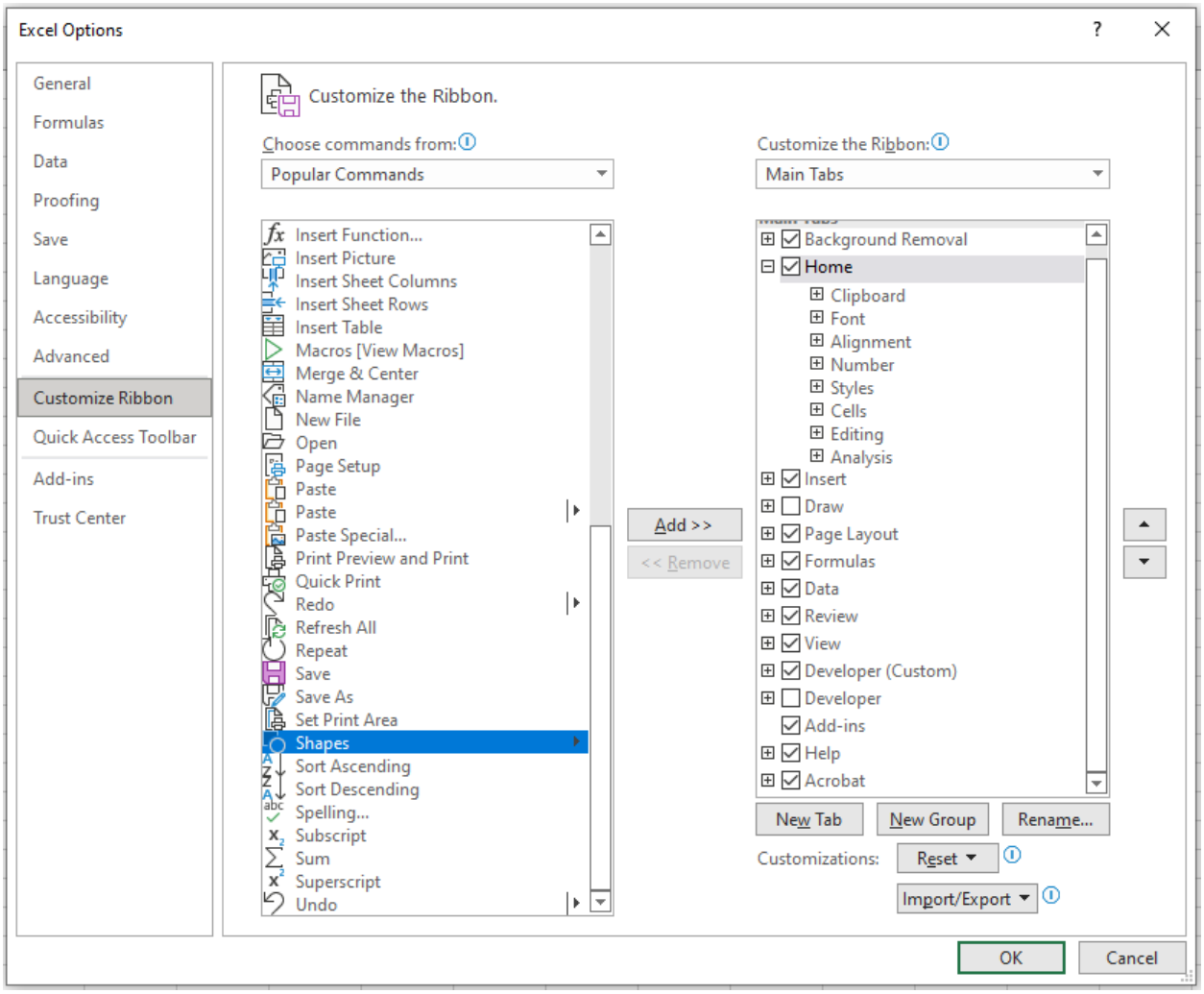
The Top Ribbon



If you don't see the functions in the top ribbon, put your **mouse over a clear spot on the top ribbon** and **right click and choose to Customize Ribbon**.

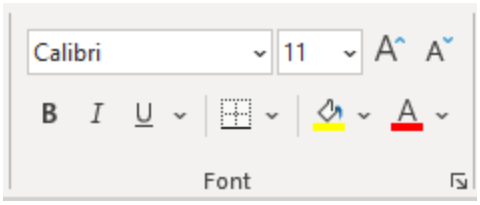
From there you can add items to the ribbon by **selecting the item from the left side** column and **Add** to move it to the right. Items on the right are what shows in your top ribbon. Most of what you saw in the video are there by default.

Same goes for removing from the ribbon. **Select the items on the right and click Remove**.



Font Features

You can Bold, Italics, Underline, change Font, change font Size, and more simply by selecting the cell and choosing the item from the Font area of the ribbon.

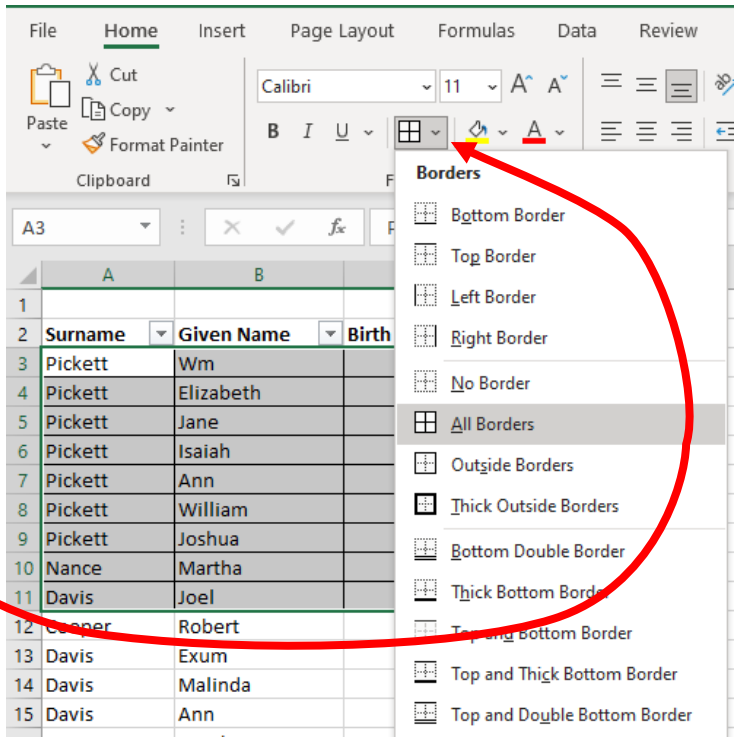


Gridlines

Not covered in the video... but useful, is adding grid lines.

While you see a faint gray grid when working in Excel, they don't print. Also, it is helpful to define sections of your spreadsheet.

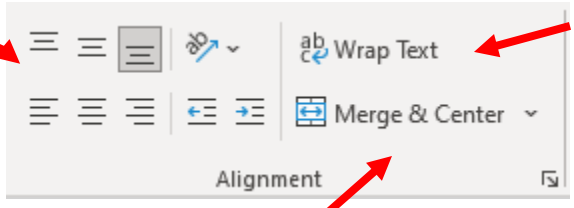
Highlight the area you want gridlines and choose the **gridline menu** and select the type of lines you want.



Align Text

Highlight the cell(s) you want to align and use the **alignment tools** in the alignment section of the ribbon.

Know that some of these tools align left, right and center, while the upper set of tools align top, middle and bottom of the cell.



Wrap Text

Text wrapping is useful when you are trying to fit a little in the width of your view or when there is a lot of text in a single cell**. Highlight the cell and choose Wrap Text.**

Merge and Center

You can merge several cells into one cell while leaving unhighlighted cells alone. **Highlight the cells** you want to merge and choose the **Merge & Center** button in the Alignment section of the ribbon. Alternatively, use the dropdown arrow to the right of the Merge & Center button, for other options.

Copy & Paste from Census

Often, we use Excel to extract data from online indexes so we can filter the data. The trick is how you paste the information in Excel so it doesn't all go into one column (see below).

Copy

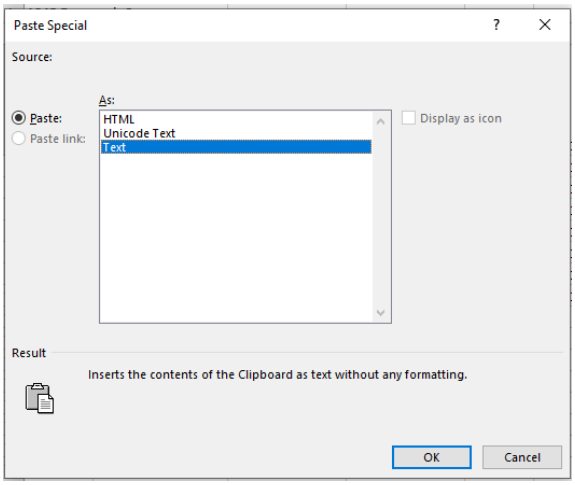
Family Number	Name	Maiden Name	Gender	Marital Status	Age	Birth Date	Birth Place	Residence Date	Residence Address	Residence Place	Relationship
6	Christiane Bech				2	1843	Kolding	1845	Tedersilliegade 156 B	Danmark (Denmark)	Barn (Child)
7	Peder Heinsen		Mandlig (Male)	Gift (Married)	45	1800	Lygum Holster	1845	Tedersilliegade 156 C	Danmark (Denmark)	
7	Maria Nissen		Kvinde (Female)	Gift (Married)	39	1806	St. Andst	1845	Tedersilliegade 156 C	Danmark (Denmark)	Haus Kone
7	Pretorius Heinsen				12	1833	Kolding	1845	Tedersilliegade 156 C	Danmark (Denmark)	Barn (Child)
7	Marine Heinsen				6	1839	Kolding	1845	Tedersilliegade 156 C	Danmark (Denmark)	Barn (Child)
7	Rasmine Kramer				5	1840	Kolding	1845	Tedersilliegade 156 C	Danmark (Denmark)	Plejedatter (Foster Daughter)
8	Peder Rugshel		Mandlig (Male)	Gift (Married)	77	1768	Bogsted	1845	Tedersilliegade 157 B	Danmark (Denmark)	
8	Cecilie Nielsdatter		Kvinde (Female)	Gift (Married)	64	1781	Smedstrup Sogn	1845	Tedersilliegade 157 B	Danmark (Denmark)	Haus Kone
8	Jens Jensen Ingerster				2	1843	Kolding	1845	Tedersilliegade 157 B	Danmark (Denmark)	Deres Pleie Søn

Paste As > Special > Text

To paste into an Excel is a littler trickier than a simple paste function. If you were to simply paste everything coped by using the Paste function in the top ribbon or CNTL+V it would paste everything into one column. This causes more work than it is worth.

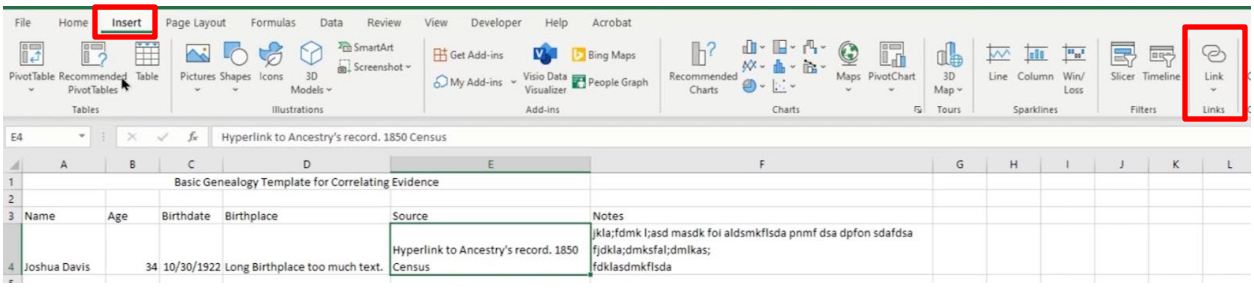
To Paste put your cursor in the upper left cell in Excel, where you want to start your data to be pasted.

Then **right-click** on your mouse and choose **Paste Special**, then choose **Text,** then **OK**. This will allow all the columns to be the same as the index from which you copied the data.



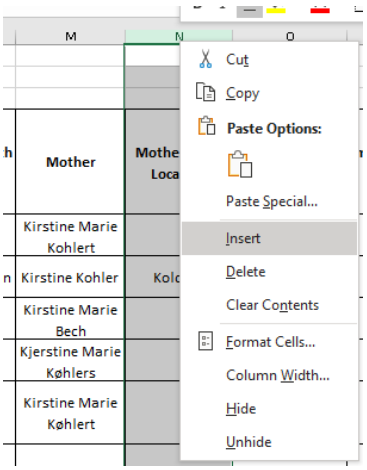
Insert Hyperlinks

To insert a hyperlink in a cell start by copying the hyperlink from your file or website. Then in Excel, select the field. You can type text in the cell first if you choose. Then from the **Insert Tab,** choose **Link on the ribbon**.



Insert Columns

To insert a column, simply click in the column header to the right of where you want the column inserted (where the letters are at the top of the spreadsheet) to highlight the entire column. Then right-click and choose Insert and the new row will be inserted to the left the highlighted row.

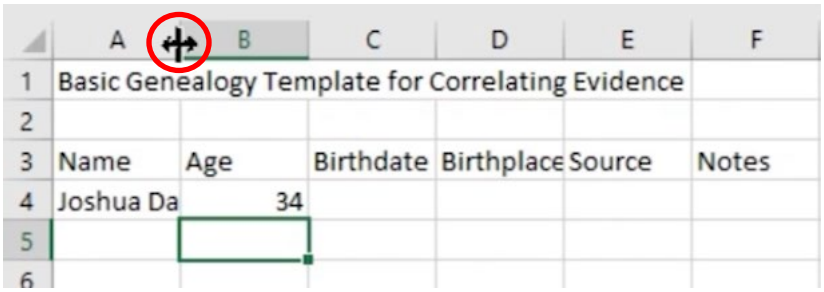


Insert Rows

Like inserting columns, the same function works for inserting rows. Click on the numbered row below where you want to column to be inserted. This will highlight the entire row. Then right-click and choose Insert, and the new row will be inserted above the highlighted row.

Resizing Columns & Rows

To resize columns, **select the column(s)** you wish to resize, **hover on the right side** of the column headers until you get the **double arrow icon**, **click and drag** to resize. Same goes for rows.

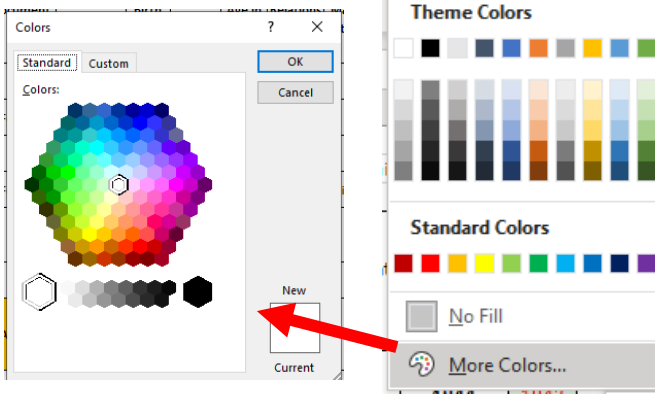


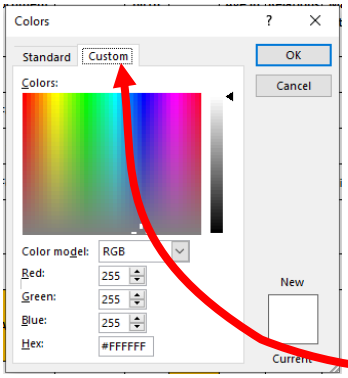
Moving Cells

Hover over the edge of a selected cell(s) until you see a black + symbol, click and **drag** the selected cell(s) **to the new cell**.

Color Cells

To colorize a cell, group of cells or a column or row. Select the cells you wish to colorize and choose the bucket tool in the ribbon in the Font section of the ribbon at the top of the page. A faster way is to right-click and click the **Fill Color** bucket tool from the mini menu.



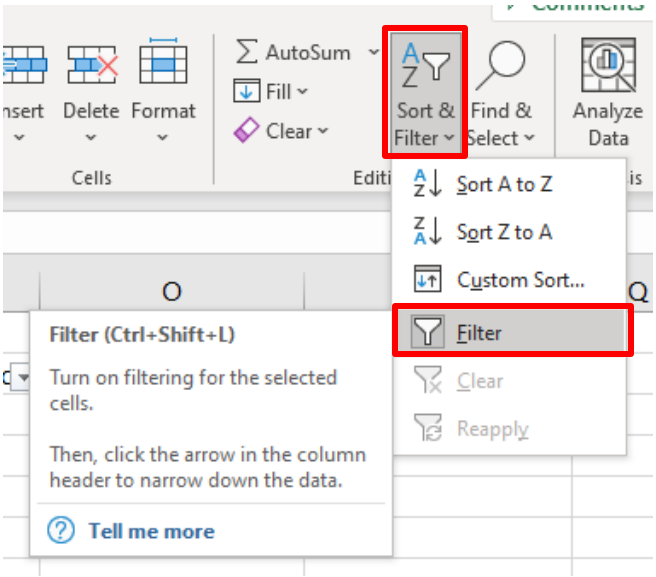


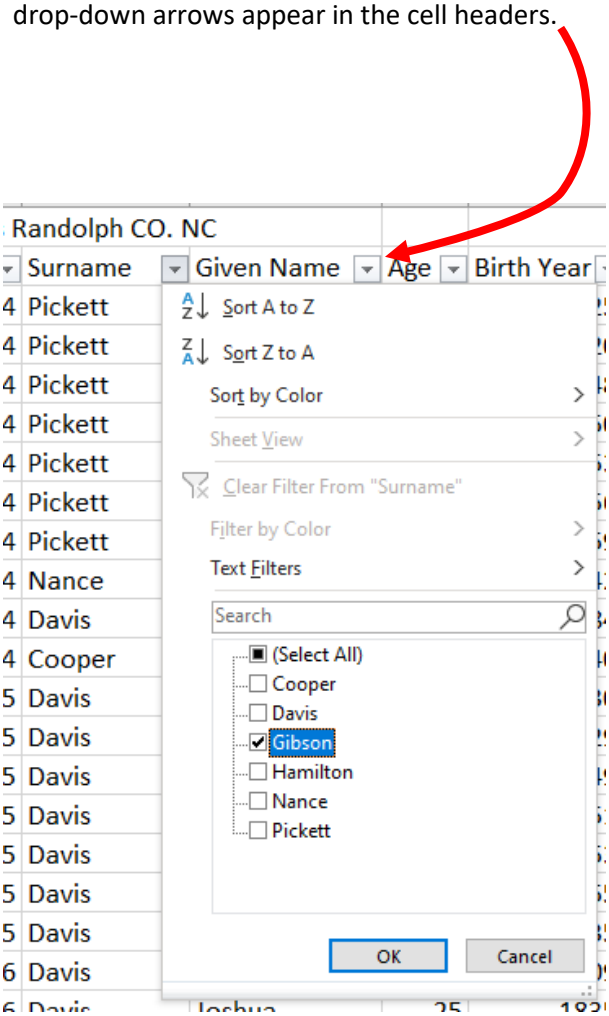
You can choose from a variety of pre-defined colors shown in the top section, standard primary colors or you can choose More Colors to give you a larger color pallet or use the **Custom tab** for colors to match your branding.

Filtering Columns

This is a popular feature. This allows you to filter by any column.

To do so, **select a cell in the row you wish to filter** (where you have put column headings), and choose the **Sort & Filter** drop-down menu and select the **Filter** button. You should see new drop-down arrows appear in the cell headers.





You can then **click the down arrow next to the column** you wish to sort and either **type the name** of the item you wish to filter to OR **check mark one or more items**. Once you **click Okay**, you will see a truncated list of the filtered items you chose.

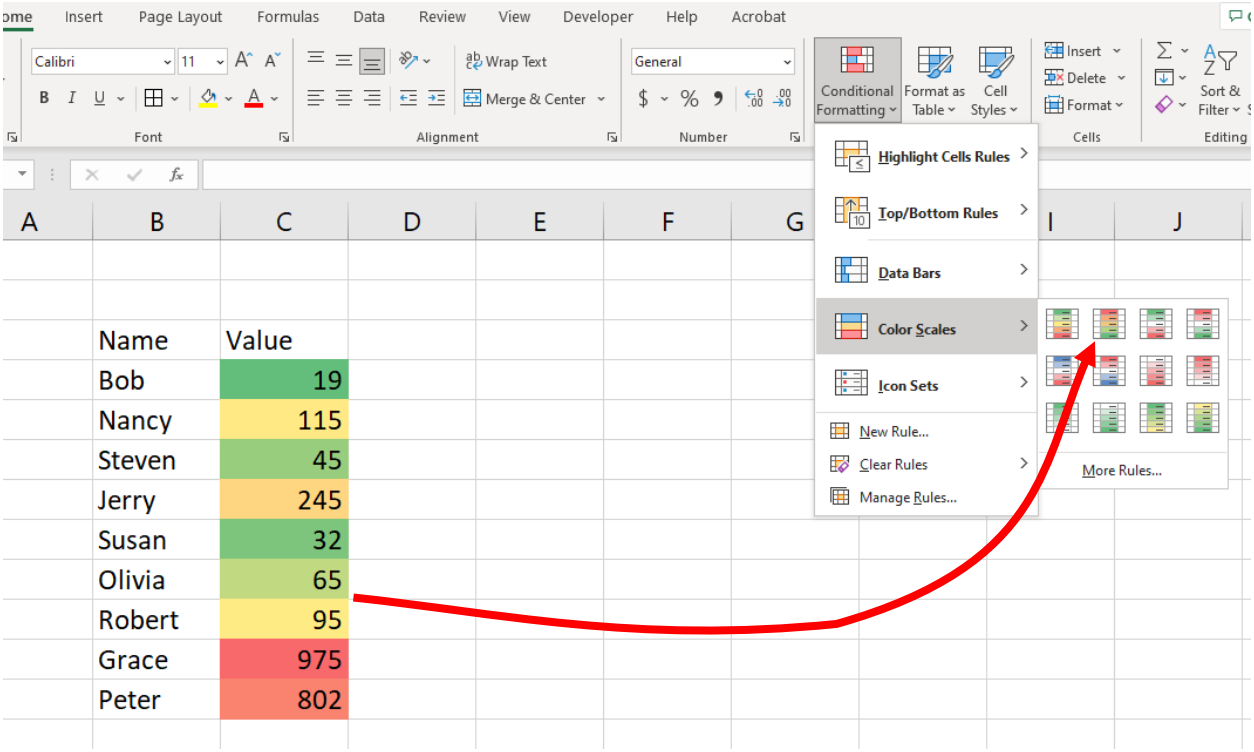
Conditional Formatting

Conditional Formatting allows you to use scales or other predefined conditions based on the value of a cell... or group of cells. To do this as demonstrated in the video, make sure the cells you want the condition applied is a number (if you want the condition to be numerical).

This could work with text as well, but it must be exact.

For numerical Conditional Formatting, **Select the cells** for the condition to be applied and choose the **Conditional Formatting** drop-down menu. In the video I used **Color Scales**.

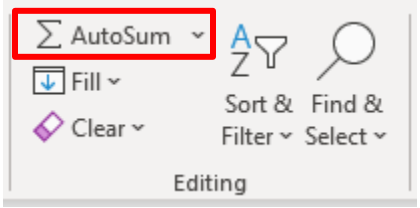
Below is a simple example, showing how the larger numbers are darker shades of red and smaller numbers are darker green, with middle values in yellow. I've pointed out the one used in this example (top row, second from the right. In the video, I used second row, second from the right.



Basic Formulas

Sum a Column

You can sum a column (not demonstrated in the video). Simply click the cell under a column of numbers and choose the AutoSum button in the Editing area of the ribbon.

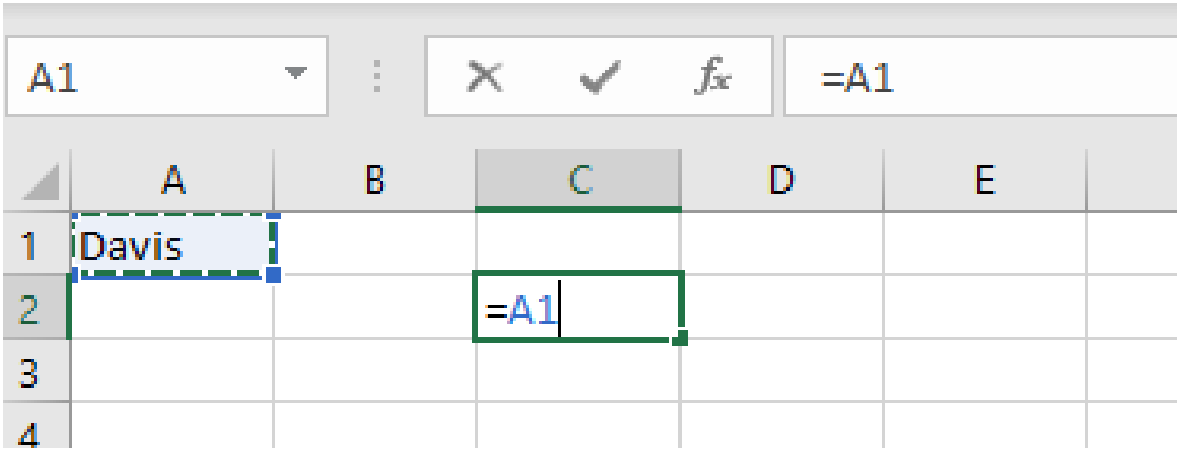


Simple Addition and Subtraction

Basic formulas start with an = sign. Select the cell for the result. To add two numbers together, in the formula bar, type **=2+2 and enter**. The cell you selected should result in the answer **4**. Use a minus to subtract.

This Equals That (Connie's nomenclature) – Duplicate One Cell to Another

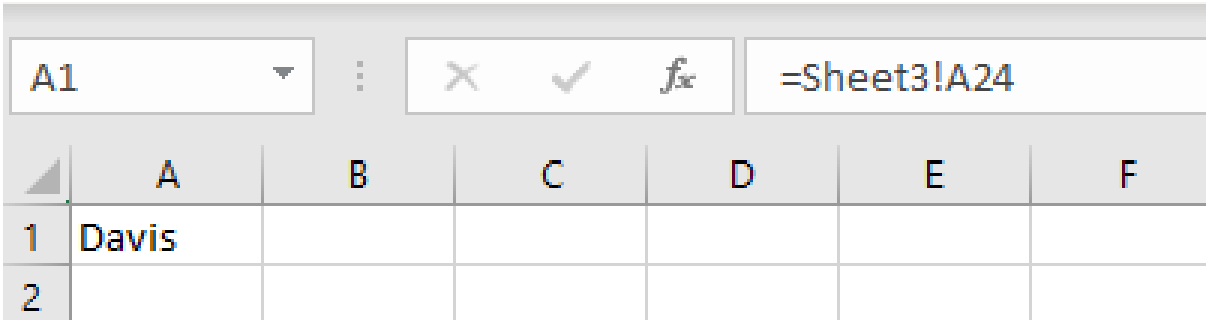
Easy. **Type = in one cell and then choose another cell to copy from and hit enter.** (Shown below)



Duplicating Cell(s) to Another Sheet

To have one cell equal another on another sheet works the same way. For example, having a number appear from one cell on sheet 2 appear on another cell in Sheet 3, you can use what I call "This Equals That".

Highlight the cell you want to copy TO, in the formula bar type =, then go to the cell you want to copy FROM (even if it is on a different sheet) and **click the from cell**. You will see dashed lines around that cell you are copying from. **Hit enter**. When you do it will take you to the new cell with the information copied from the previous cell.



In other words, THIS cell EQUALS THAT other cell.

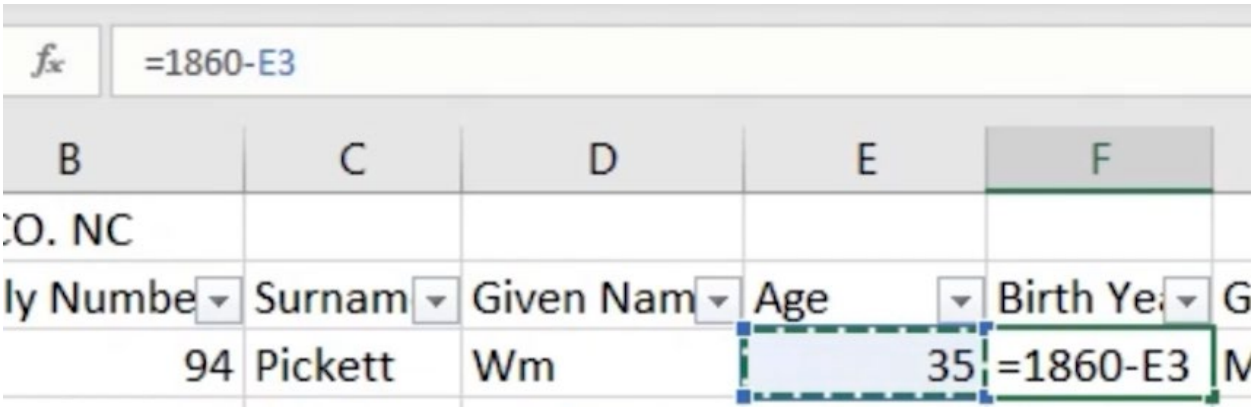
The video best demonstrates this starting at 36:39 in the video.

Changing the original *from* data will change the *to* cell automatically.

Calculate a Birth Year from an Age Column

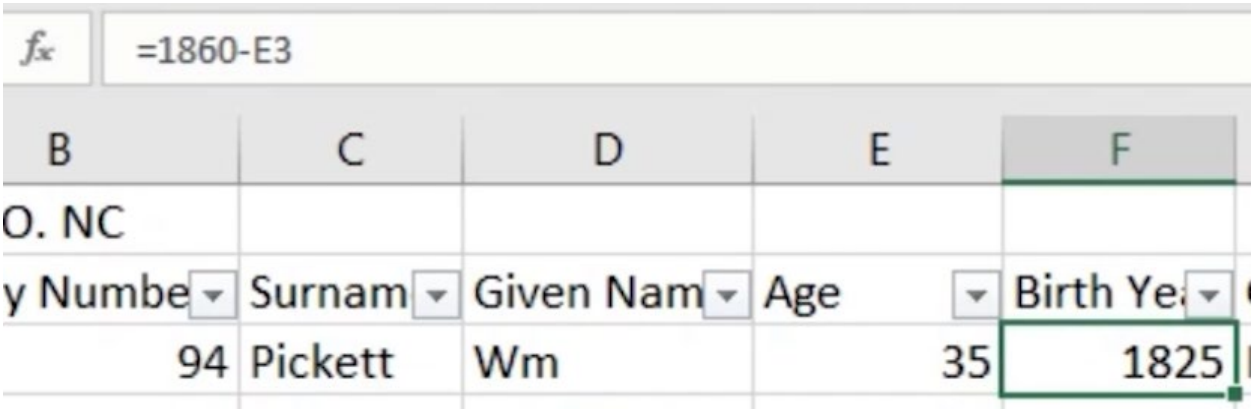
Demonstrated at 34:05 in the video.

To use a simple formula to calculate the birth year from an age column, **select the cell where you want the results** to go, then use "**=**" then **type the year** of the record **minus** the **cell with the age** (in our case cell E3). In the video we used the 1860 record and were using the ages provided to create an estimated year of birth.



For example, **"=1860-E3**" Then hit **enter**.

The result is 1825 (below).



This means the cell you started on has a formula that says this cell equals the 1860 year (from our census example) minus the cell E3 (where the age 35 was listed).

Keyboard Shortcuts for Windows

CNTL Z = Undo

CNTL Y = Redo

CNTL S = Save

CNTL X = Highlight Cell

CNTL C = Copy

CNTL V = Paste

ALT Enter – To add a return in the formula bar

Double Click between the column headers to autofit the width of the column to the left.

Double Click between the rows to autofit the row above.

Create Filters = CNT Shift L

Right-Click over any cell, for shortcuts from the mini menu.

Other Videos Using Excel for Genealogy

Organize DNA Cousins Using Excel Spreadsheets

#1 Way to Break Down Brick Walls - Trick to Making Cluster Research Faster (2018, See also the 2020 updated version)

#1 Way to Break Down Brick Walls: Updated 2020

Extract and Filter City Directories Using Excel

Extracting Census Data into Excel to Find More Ancestors: Tiny Tip Clip