

# Fun with Microsoft Excel® - Manipulate Your Genealogy Data

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Lab2636 Thursday & Saturday

RootsTech2016

As genealogists we have many software tools at our disposal – some are purpose built for our family history research (genealogy management software); others are tools that we might be familiar with but we haven't considered using with our genealogy. For many of us, Microsoft Excel ("Excel") is one of those tools. It is a powerhouse tool for gathering, sorting, filtering, manipulating, and analyzing our genealogy data. In this computer lab session, we are going to take a hands-on approach and work through 15 tips for setting up our Excel workbooks to get the most out of them. Even if you have never used it before – you can get started today and have fun with Excel.

1st

## Why and how we can use spreadsheets with our genealogy

Simply put, we want to use the right tool for the job. Our genealogy management software has come a long way in the past ten years – we now have mapping, source citations, timelines, charting, to-do lists, research guidance, and a host of other tools right in our software. Whatever platform our software is built on, we often have the capability to export any of our data, lists, and reports to csv (comma separated value) or pdf (portable document format). In either case and with corresponding software, we can take that data and do more with it. In addition, the process of gathering large amounts of data (whether from a research facility or an website database) and then organizing and working with it to suit our own needs can easily be done by placing that data in a csv file. Once we learn the basics of working with a spreadsheet (here we are using Excel), there are few limits to how we can use it to increase our productivity.

Some examples include: (1) abstracting or transcribing information from record sets; (2) downloading data from websites for further research; (3) keeping track of work flow with a research log; (4) keeping track of education sessions, research websites, special projects, contacts and/or expenses with a projects log; and, of course, (5) performing statistical analysis or "numbers crunching."

2nd

## How our computer lab will work

RootsTech gives us several ways to learn – whether that is through a lecture presentation, a panel presentation, or a hands-on computer lab. We know there are several methods to learn (by listening, by watching, by reading, by doing, and/or a combination of any of these learning methods). One of the best ways to learn a skill is to watch someone do it and then try it yourself – and that's what we will be doing in our session.

At the outset of our session, I will provide you with a detailed handout with each of my 15 tips for setting up our Excel workbooks (the tip and all of the steps will be included so you can follow along during the computer lab, make notes, and take away a "cheatsheet" of your new skills). I will demonstrate 3 tips at a time while you "watch and learn." Then we play - each of you will select whichever tip you want to "try and master." While you are "doing" I (and my lab aides) will be encouraging you, answering questions, and/or helping you master that tip. Then I will demonstrate the next 3 tips and we do it all over again. This will be a high intensity Excel workout: you can simply follow along with the demonstrations and take notes, or go full out and try at least 5 tips. Either way, we will come to play and have fun.

3rd

### 15 tips for setting up our Excel workbooks

Once we learn how to set up our Excel workbooks in a consistent manner, we will proceed to learn how to work with the basics as well as some of the quirks of a spreadsheet (including a very few math functions). We will learn how to make our software do more of the work for us, and how to use some of its best features to manipulate and analyze our data. Learning these 15 tips and getting comfortable with Excel at the start of a project will save time in the long run. My best advice: spend the time at the beginning and learn to do it right – work smarter, not harder!

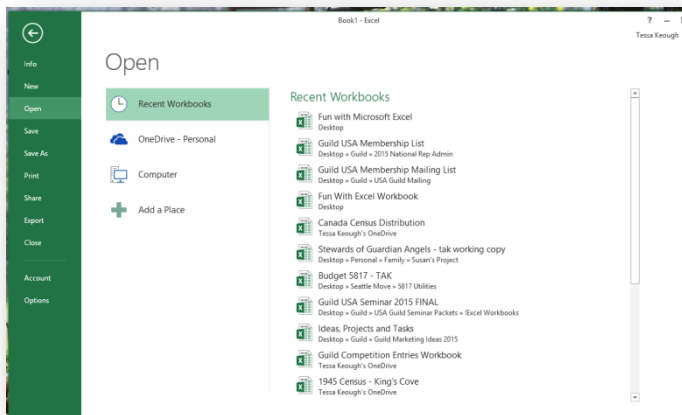
- ◆ Using Properties
- ◆ Preparing Instructions
- ◆ Working with columns and rows
  
- ◆ Understanding the "date issue" in Excel and how not to get tripped up
- ◆ Setting up your worksheets to mirror the documents you are indexing or abstracting
- ◆ Making it clear and colorful with Labels & Colors
  
- ◆ Entering data in Excel cells
- ◆ Checking your work via Quality Control features
- ◆ Learning to use some basic formulas and macros (only the ones that do the math for you!)
  
- ◆ Learning how to "transpose" to save yourself time and effort
- ◆ Downloading data from websites to your worksheet
- ◆ Filtering and Sorting to work with your data
  
- ◆ Saving and Using your workbook
- ◆ Publishing and Sharing your workbook
- ◆ Using a workbook with a specialized genealogy project

How we will get through it all in an hour? It is going to take being involved the entire time (no distractions for you or your session mates, i.e., cell phones), being prepared to watch, learn, and do (no worries if you don't get it the first time, we will have the detailed instructions to take away and you can keep learning at home with your "cheatsheet"), and a willingness to budget our time and move through each of the tips.

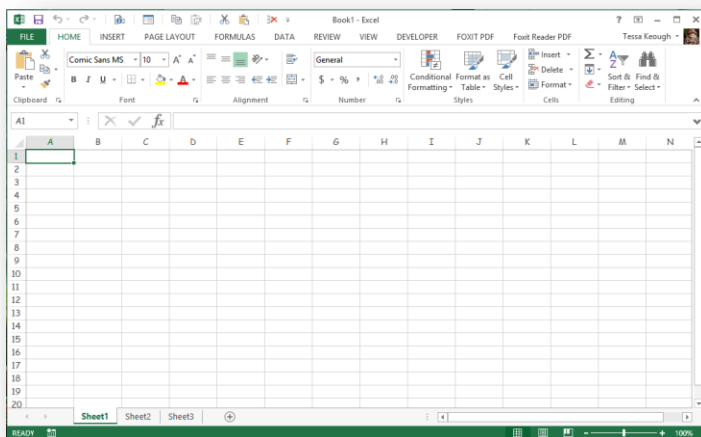
4th

### If you have not used Excel before, here are a few basics so that we are all on a level playing field at the start of our computer lab session.

On your PC, if you do not use the Start Menu in Windows 7, 8 or 10, use your File Explorer to go to Programs → Microsoft Office → Excel. We will be using Excel 2013 which is interchangeable with Excel 365 (the Sky Drive and Mobile App versions). You may have another version at home, but the tips will work in any of the versions with the ribbon system. When we open Excel, these are the first views we will see.

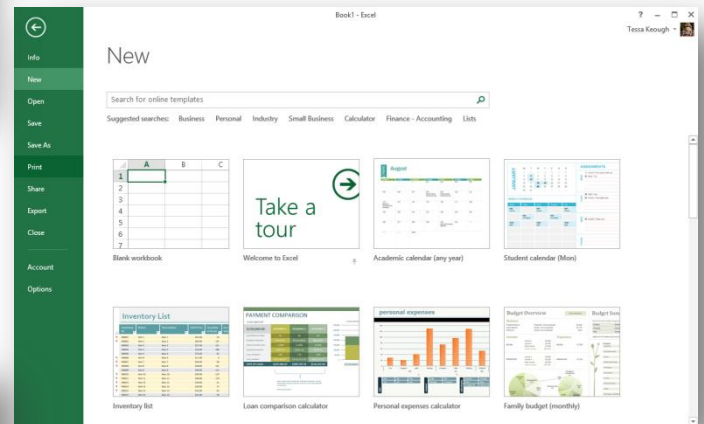


**Blank Workbook** gives us a clean slate to get started having fun with Excel! Now we are all on the same page.



**Open** shows our recent workbooks, our online (in the cloud) storage, our computer storage, and the option to add a place (great tip right there!).

**New** gives us several choices. We can use a blank workbook or the templates provided and adapt them to our needs.



5th

**Do you want to learn more about it? There are several excellent resources to help us learn how to use Excel with our genealogy. Here are a few to check out:**

**Microsoft Office Tutorials** – go right to the source (<https://support.office.com/en-us/article/Excel-2013-videos-and-tutorials-aaae974d-3f47-41d9-895e-97a71c2e8a4a>); Microsoft writes and updates this software and they have some excellent tutorials and help sections.

**Your local Library or Bookstore** – an excellent place to find books about how to use Excel (as well as related Microsoft Office products). Take advantage of your local library to check out a few books and learn the basics and more:

Marmel, Elaine. 2013, *Office 2013 the fast and easy way to learn*

Cronan, John, and Martin S. Matthews. 2013, *Microsoft Excel 2013*

Dodge, Mark, and Craig Stinson. 2013, *Microsoft Excel 2013 inside out*

Frye, Curtis. 2013, *Microsoft Excel 2013*  
Harvey, Greg. 2013, *Excel 2013 for dummies*  
Miller, Michael. 2014, *Microsoft Excel 2013*

**Online and Social Media Sites** – both Facebook and Google+ have groups for anyone interested in learning more about Excel (the various groups are great places to share knowledge, learn the latest tips, and get your questions answered quickly). Groups (or Communities) with a focus on Excel for beginners and Excel for genealogists are:

**On Facebook**

Excel-ing Genealogists (<https://www.facebook.com/groups/130530510310027/>)

Microsoft Excel (<https://www.facebook.com/microsoftexcel/?fref=ts>)

**On Google+**

Microsoft Word/Excel/PowerPoint ([https://plus.google.com/u/0/collection/4J\\_n6](https://plus.google.com/u/0/collection/4J_n6))

Excel Tips (<https://plus.google.com/u/0/communities/110881933236217514198>)

**On YouTube**

Excel for Beginners ([https://www.youtube.com/results?search\\_query=excel+2013+for+beginners](https://www.youtube.com/results?search_query=excel+2013+for+beginners))

Excel with Genealogy ([https://www.youtube.com/results?search\\_query=excel+with+genealogy](https://www.youtube.com/results?search_query=excel+with+genealogy))

**Cyndi's List** – in a class by herself, Cyndi's website is a collection of links for all things genealogy-related and that includes technology. So be sure to check out Cyndi's List (<http://www.cyndislist.com/cyndislistsearch/?q=Excel>) to learn more about using spreadsheets with genealogy.

*And be sure to type your specific question or topic in the search box, to filter or limit your search results at the various social media sites.*

**Online Courses** – Whether you check out genealogy-related courses offered by *Legacy Family Tree Webinars* (<http://familytreewebinars.com/>) or a host of sessions offered by local, regional and national genealogical societies, be on the lookout for sessions on using spreadsheets with genealogy.

Be sure to check out courses offered by online learning companies (most have free as well as cost-based courses) like GCFLearnFree.org (<http://www.gcflearnfree.org/office2013/excel2013>) and Udemy (<https://www.udemy.com/courses/search/?ref=home&src=ukw&q=excel+2013&lang=en>) to name just a few examples.

**Browser Searches** – learn to ask your questions about Excel in the search box of whatever browser you use (and don't limit yourself to one browser, be willing to switch things up and see the difference in your results).

**My contact information**

6th

If you have questions about what we do in our session or the handout we use, please contact me. I would love to hear your suggestions for additional tips or even easier ways of doing something in Excel. And take advantage of the hour after our session (I will be outside to take your questions) or use the RootsTech mobile app to ask me a question. I will post some short video tutorials on my YouTube channel (TessaWatch) with links especially for those who attend the computer lab session. For those interested in how I (and others) use Excel with a one-name study or other specialized studies, please stop by the Guild of One-Name Studies' booth in the Exhibit Hall. I look forward to seeing you at the Thursday or Saturday session.

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