

USING A SPREADSHEET TO RECORD YOUR RESEARCH FINDINGS

BY BOB DAWES

In my pursuit of this hobby I have amassed a large collection of disjointed research information about each of my family groups. These items range from official statutory registration certificates to handwritten lists scribbled on memo pads. I have binders, file folders, photocopies, memo pads, loose sheets of paper, computer print-outs and hundreds of images of documents on my hard-drive not to mention email messages with genealogical information imbedded in them. How do you manage all of this disparate information so that you can make sense of it to help in your family history research? My answer to this dilemma is to use a spreadsheet program.

While most people recognize spreadsheets such as Microsoft Excel and Corel Quattro-Pro as financial tools most don't realize their potential as database tools. They are also much easier to learn to use than their commercial database counterparts such as dBase, Access or Paradox not to mention much cheaper. If you have an Office Suite or a program such a MS Works then you likely have a spreadsheet program included in it and if you don't there are some free versions available such as Star Office and Open Office. Just Google those names to find them on the web.

Basically, a spreadsheet is a group of rows and columns but its power for genealogists lies in its ability to sort your data quickly and efficiently. Additional advantages are its printing options and the ability to transfer a file to your palmtop or laptop computer. Windows CE and Palm OS allow you to transfer Excel files to a stripped down version carried on your portable computer and in my case this is Pocket Excel. This means that I can easily take my research with me when I go on field trips.

We address the issue of inputting text data by thinking of fields and records as you would with a traditional database program. The columns are used for your Field Names and the rows are used for individual Records. By recording my information into a spreadsheet also means that I can file the originals and copies away and clear my desk space so I actually have some room to work

In my examples that follow I am using my own Field Names (Column Headings) but you can use anything you want with more or less detail depending on your requirements. That's the great advantage about using a spreadsheet as it's as flexible as you need and the limit on records to a single sheet is 65,536 so you won't run out of space for a while. Even though I could put all of my information into one spreadsheet, I prefer to divide up my research data geographically. More specifically, Scotland and Southeast England in my case although you could use family groups as well. Use the [Save As] command from the file menu to name your spreadsheet as soon as you've entered your Field Names.

1	A	B	C	D	E	F	G	H	I	J	K	L	
	SURNAME	GIVEN NAMES	YEAR	EVENT	ADDRESS	PLACE	COUNTY	SOURCE	REFERENCE	NOTES	BIRTH	EVENT DATE	SPOUSE/PARENTS
815	GIBSON	Robert	1849	Bapt		Beith	Ayr	NAS	CH3/1053/9	Outrider	27Mr1849	10Je1849	s/o GIBSON, Robert
816	KENNEDY	Jane Hamilton	1849	Bapt	So. Coburgh St.	Glasgow	Lanark	GA	CH3/770/9	Rope spinner	30Je1849	01My1853	d/o KENNEDY, John
817	KENNEDY	Thomas Hamilton	1849	Bapt	So. Coburgh St.	Glasgow	Lanark	GA	CH3/770/9	Rope spinner	30Je1849	01My1853	s/o KENNEDY, John
818	GEMMEL	William	1850	Bapt	Main St	Dalry	Ayr	NAS	CH3/1033/4		19De1850	23Ja1853	s/o GEMMEL, William
819	JAMIESON	Janet Robertson	1850	Bapt		Beith	Ayr	NAS	CH3/1053/9	Collier	21Je1850	04Oc1850	d/o JAMIESON, John
820	KINNEDY	John	1850	Bapt	Burnside	Dalry	Ayr	NAS	CH3/1033/4		13Apr1850	21Apr1850	s/o KINNEDY, Lauch
821	SOVAN	Jean	1850	Bapt	Ltonienoop	Glasgow	Lanark	GA	CH3/399/4	Papermaker	20Fe1850	10Mr1850	d/o SOVAN, William
822	GARDINER	Agnes	1851	Census	33 Castle St S,	Edinburgh	Midlothian	Mitchell		Head/W/47/Linen draper/Beith	xxxx1804	xxxx1851	
823	GARDINER	Jessie	1851	Death					AF Film 170438		04Je1806	19No1851	
824	JAMIESON	Janet	1851	Census		Beith	Ayr	EA-FHS		36/	xxxx1815	xxxx1851	
825	JAMIESON	Jean	1851	Census		Beith	Ayr	EA-FHS		9/	xxxx1842	xxxx1851	
826	JAMIESON	John	1851	Census		Beith	Ayr	EA-FHS		36/	xxxx1815	xxxx1851	
827	JAMIESON	Robert	1851	Census		Beith	Ayr	EA-FHS		16/	xxxx1835	xxxx1851	
828	JAMIESON	William	1851	Census		Beith	Ayr	EA-FHS		6/	xxxx1845	xxxx1851	
829	LAMB	Agnes	1851	Census	98 Main St	Lochwinnoch	Renfrew	Mitchell	570/4/pg23-24	Wife/M47/Spinners Wife/Beith	xxxx1804	xxxx1851	George LAMB
830	LAMB	Agnes	1851	Census	98 Main St	Lochwinnoch	Renfrew	Mitchell	570/4/pg23-24	Son/U/3/Scholar/Lochwinnoch	xxxx1848	xxxx1851	
831	LAMB	Andrew	1851	Census	98 Main St	Lochwinnoch	Renfrew	Mitchell	570/4/pg23-24	Son/U/13/Scholar/Lochwinnoch	xxxx1838	xxxx1851	
832	LAMB	Archibald	1851	Census	98 Main St	Lochwinnoch	Renfrew	Mitchell	570/4/pg23-24	Son/U/15/Scholar/Lochwinnoch	xxxx1836	xxxx1851	
833	LAMB	Christina	1851	Applicant		Edinburgh	Midlothian	GA	MS CASSILS	Call # D-HEW 10/6/1(B) Pg 129	xxxx1801	xxxx1851	
834	LAMB	David	1851	Census	98 Main St	Lochwinnoch	Renfrew	Mitchell	570/4/pg23-24	Son/U/9/Scholar/Lochwinnoch	xxxx1842	xxxx1851	
835	LAMB	George	1851	Census	98 Main St	Lochwinnoch	Renfrew	Mitchell	570/4/pg23-24	Head/M46/Wool Spinner/Musse	xxxx1805	xxxx1851	Agnes LAMB
836	LAMB	Jane L	1851	Census	98 Main St	Lochwinnoch	Renfrew	Mitchell	570/4/pg23-24	Dau/U/20/Millworker/Lochwinnoch	xxxx1831	xxxx1851	
837	LAMB	Mary	1851	Census	98 Main St	Lochwinnoch	Renfrew	Mitchell	570/4/pg23-24	Dau/U/16/Millworker/Lochwinnoch	xxxx1835	xxxx1851	
838	LAMB	Thomas	1851	Census	98 Main St	Lochwinnoch	Renfrew	Mitchell	570/4/pg23-24	Son/U/5/Scholar/Lochwinnoch	xxxx1846	xxxx1851	
839	SEIVEWRIGHT	Agnes	1851	Census	Calton	Glasgow	Lanark	Mitchell	622-parish 597	Dau/U/13/PLW/Montrose	xxxx1838	xxxx1851	
840	SEIVEWRIGHT	Ann	1851	Census	Calton	Glasgow	Lanark	Mitchell	622-parish 597	Wife/M44/Housekeeper/Montros	xxxx1807	xxxx1851	George SEIVEWRIGHT

The above image is an excerpt from my Scotland Research file and as you can see I have fields for the following information.

FIELD NAME	FORMAT	INFORMATION (examples)
SURNAME	Uppercase; () for other spelling	Persons surname
GIVEN NAMES	Normal case	All known given names or initials
YEAR	4 digit year	Year of the event being recorded (Note 1)
EVENT	Type of event	Birth; Bapt; Death; Marr; Census; Informant
ADDRESS	Location of event, if known	Street address; Suburb; Church; Farm
PLACE	Place of event	Town; City; Area
COUNTY	County of event	County
SOURCE	Where the information is from	Library; Archives; LDS; FreeBMD
REFERENCE	Source details	Call/film/batch or library reference numbers
NOTES	Additional details about person	Occupation; census entries; outrider (Note 2)
BIRTH	8 character format DDMmYYYY	Birth date if known (Note 3)
EVENT DATE	8 character format DDMmYYYY	Event date other than if not birth
SPOUSE/PARENTS	Uppercase surnames	Spouse or s/o, d/o for parents (Note 4)
DOCUMENT	Source name of document	Book, IGI, Directory, Image; OPR Index
FOUND	Source of the information	2004 trip; Internet; FamilySearch; Site
LOCATION	Your storage information	File; Binder; Archival Box (Note 5)
INPUT SEQUENCE	4 digit number	Sequence in which data was input (Note 6)

- Note 1 While spreadsheets can format dates they don't like ones earlier than Jan 1, 1980 and especially don't deal well with those in the 1800's and 1700's so I get around it by entering just the year for sorting purposes.
- Note 2 I use this field for a variety of additional data such as census information or the occupation of the individual (separated by slashes). In cases where I've recorded an informant or a witness, I use this space for their relationship to the primary party. I use the term "outrider" to identify information that I've collected that doesn't yet relate to my family.
- Note 3 For both the birth and event dates, I use a personal date shorthand with only 8 characters (DDMmYYYY eg. 03Ja1861) so Excel won't try to format it as a date. Some spreadsheets will try to automatically format fields as numbers, text or dates based on their entries and this avoids that from happening. Where a date is imputed by subtracting the age from the year, as in a census, I add 4 x's (xxxx) in front of the year so I know it's calculated and not actual. For months I use Ja; Fe; Mr; Ap; My; Je; Jl; Au; Se; Oc; No; De and since their letters are all unique they can't be confused.
- Note 4 If I know the spouse from a marriage certificate, I enter the name in the usual format of uppercase surname followed by the given name but in the case of an assumed entry from a census, I reverse the name sequence and put the given name first. Parents are preceded by s/o or d/o to indicate them as a child of and their sex.
- Note 5 Since we're doing this to clear up our work space it's important to identify where to find the information if you need to refer to it again for verification. If I've taken something off the web and not printed it out I note that fact here along with the web URL.
- Note 6 Usually you will enter your data in logical groups after a research trip. This information can be important so I added this field that allows me to sort my entries back into the sequence they were when I entered them. This also keeps family groups together from census entries.

The great advantage of using something as flexible as a spreadsheet is that you can add or change whatever you want. Your field name requirements may be different from mine so use the ones that make sense to you. If you discover that you need a new field for additional information then simply highlight the column to the right of where you want it and use the [Insert Column] command to create a new one. If you are inputting repeated information such as the address, place & county from a census, use the copy and paste utility to save keystrokes. Click on the borders between columns to readjust their width to fit the content which will change as you add more information and use the freeze frames option to lock your field names in place at the top of the screen otherwise they'll scroll up and you can't keep track of which field you're entering. Freezing is done by placing your cursor in cell B-1 and selecting [Freeze Frames] from the Window menu. Finally and most importantly, save your work often by pressing <CTRL> + S or clicking the save icon. Alternately, you can set a timed, automatic save like Word Processors have but by default this is turned off in spreadsheet programs.

Now that you've collected your data lets look at using it. The easiest feature to use is the sort utility found under the Tools Menu in Excel. Before sorting make sure you've saved your file and then highlight the

sort area by placing your cursor in cell A-1, use <CTRL> + <HOME> to get there from anywhere in the spreadsheet. Next, hold your Control and Shift keys down while pressing END to highlight the entire data portion of your spreadsheet. Don't leave any blank lines in your spreadsheet or this won't work so make sure that your field names row and your data records are all contiguous. Now select the Data – Sort function from the menu bar at the top of the screen.

The sort function should pick up that you've got a Header Row but if it doesn't click the appropriate Radio Button on the dialogue box to the right. Sorting can be done in three levels and my favourite is by Year and then Surname and Given Name. Clicking the down arrow in each sort criteria window will display a list of your field names. When you've got the sort criteria set up the way you want press <OK> and your data is re-ordered for you. To get back to the order you had before starting, just use your Input Sequence field as a single criteria and you're back since it started at number one and increased with each record you entered in the sequence that you used.



The first thing I do after sorting like this is to scroll through my data looking for duplicates that I've entered since there are times I've copied information I had already gathered or two sources have the same material like FreeBMD and 1837Online. These redundant rows can be quickly deleted to reduce the size of your spreadsheet.

My only caution when sorting is to remember to highlight your entire data area before doing so or you will sort only part of your spreadsheet making it useless and unless you use UNDO <CTRL >+ Z right away it will be difficult to fix. For this reason, I make a duplicate copy of my master spreadsheet and save it under a different name using the [Save As] Command before I mess with it. Add the word "master" to the file name you select so you can differentiate it from your working copy.

Finally, if you want to use a form to enter your data or to do quick and easy searches, place your cursor in the Home Cell (A-1) again and select Form from the Data Menu. You should see the following dialogue window where you can either enter, correct or search for information.

To search, select the Criteria Button and enter the required date in the appropriate field and then click Find Next. Your entry that corresponds to the criteria will be shown and using Find Next again will cycle through all of the ones that match if there are more than one.

To enter additional data either fill in the appropriate field on an existing record or click the New button to clear all fields. If you prefer to use a form for entering your data, just enter your Fieldnames on the first row of the spreadsheet and then pick the Form option to use it. Use the <TAB> key to move through your form as you would the spreadsheet.

I also use spreadsheets to catalogue all of my certificates and original copies or images and

to record extractions from the 1861 Sussex census. The possibilities are endless but we'll leave those for another article. Enjoy your research!