

Dear Genealogist:

This electronic handout is intended as an accompaniment to the lecture *Spreadsheet Tricks for Genealogists* presented by Pamela Boyer Porter, CG<sup>SM</sup>, CGL<sup>SM</sup>. The syllabus material for this lecture was included in the handout at the conference or seminar.

In the presentation, I demonstrated several uses of Excel for analyzing genealogical data. These “tricks” used numerous features of Excel, which proved too lengthy and unwieldy for me to fully document here without, in effect, writing a new user guide to Excel. A list of very helpful online tutorials from Microsoft itself is included in the latest revised version of the *Spreadsheet Tricks* syllabus material, which can be downloaded from [www.MoMemoryLane.com/resources/revspreadsyllabus.pdf](http://www.MoMemoryLane.com/resources/revspreadsyllabus.pdf). I urge you to try Microsoft’s online help and tutorials, some of which are interactive so you can learn as you go.

The exact instructions provided in this handout should work with Microsoft Excel 2003 and, for the most part, with previous versions of Microsoft Excel. The spreadsheet function in Microsoft Works does not support all the features of Excel.

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I hope that you try some of these “tricks” and that they help some of your family history research in a new and helpful way.

Happy computing!

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## Why use a spreadsheet?

A spreadsheet can help you organize your research better or see your data in a new way. Sorting and viewing it in a spreadsheet is different than seeing the information in your genealogy database. You may see some obvious answers in information that you've already collected. It's also easy to import and export information from a word processor or database. Let's learn to use a few features of Microsoft Excel that may help you with your genealogical research.

## A Spreadsheet is Flexible

It's easy to change a spreadsheet, formatting on the fly as you work. Here are just a few of the ways you can customize your spreadsheet.

### Stretch or shrink columns


If a given column on your spreadsheet is too narrow to see all the text, simply move the cursor to the upright line after the column label (A, B, C, etc.). When the cursor turns into a cross, click and drag to the right to make it wider or to the left to make it narrower. This action changes the width of the entire column below that letter. [screenshot]

### Add or delete columns, rows

1. Place the cursor in the column where you want a new column or the row where you want a new row.
2. Choose Insert > Rows (or Insert > Columns).

### Combine cells

Sometimes it's convenient to merge two or more cells into one. For example, you might have some column headings like *City*, *County*, and *State* on one row (see Row 2 in the example below). It would be nice to center the title "Residence in 1880" in one field centered in the row above these three fields.

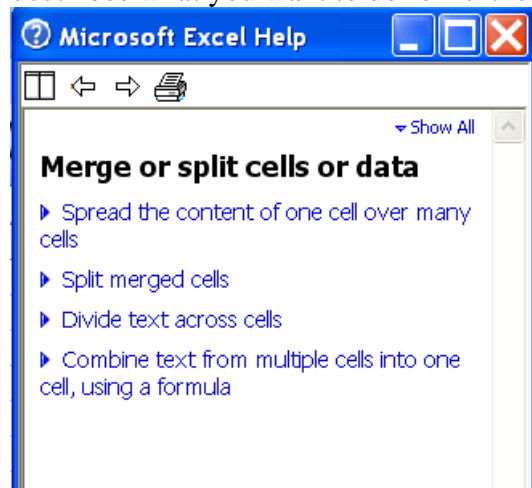
1. Click and drag the mouse to select the three cells in the row above the column headings (cells A1, B1, and C1).
2. Then click the Merge and Center icon  in the toolbar.

	A	B	C
1			
2	City	County	State
3	Barlow	Ballard	Kentucky
4	Barlow	Ballard	Kentucky
5	Barlow	Ballard	Kentucky
6	Horse Cave	Hart	Kentucky
7	Albany	Clinton	Kentucky
8	Sartain	Metcalfe	Kentucky
9	Hays	Clinton	Kentucky
10	Edmonton	Metcalfe	Kentucky

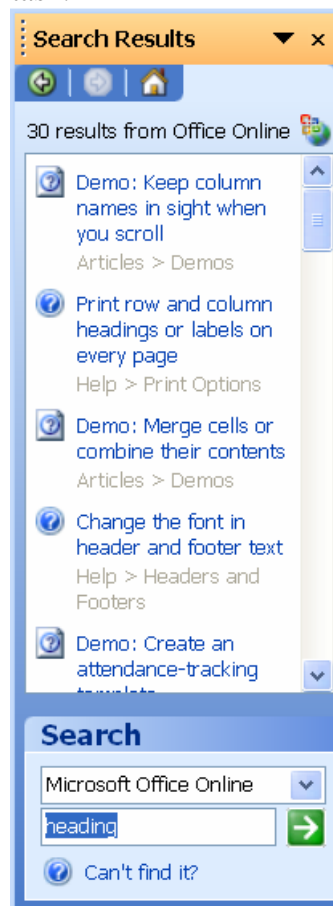
	A	B	C
1	Residence in 1880		
2	City	County	State
3	Barlow	Ballard	Kentucky
4	Barlow	Ballard	Kentucky
5	Barlow	Ballard	Kentucky
6	Horse Cave	Hart	Kentucky
7	Albany	Clinton	Kentucky
8	Sartain	Metcalfe	Kentucky
9	Hays	Clinton	Kentucky
10	Edmonton	Metcalfe	Kentucky

## Use the Help Features

Microsoft Excel has excellent built-in-help. You can search offline for the topic you want. For example, a search for the word *heading* in Excel help provides several topics. If you choose **Merge or split cells or data**, the following help displays. You can then click the link that best describes what you want to do for further instructions.



If you have an always-on Internet connection such as highspeed DSL or cable, you can take advantage of Microsoft's online help, including online demonstrations of how to do a particular task.



If you can't remember or simply don't know how to accomplish a task in Excel, your first step should be to click that Help menu in the upper right corner.

### ***Undo is your best friend***

Don't be afraid to try things in Excel. You can't go too wrong with your friend, the Undo button



sitting on the toolbar. Didn't mean to sort the data in that order? Click Undo. Didn't want to bold that column? Click Undo. If you've tried a series of tasks, keep clicking Undo several times to backtrack and undo your last action(s).

### ***Look at every menu option***

Be a little like your pioneer ancestors—*explore!* Hover the cursor over each button on the toolbar to see what it is. Click on the menu options and see all the sub-options available to you.

### ***Search Google for help***

If you can't find what you need in Excel's offline or online help, or you just can't figure out how to phrase the query, you may want to try another great resource. Chances are, someone else in the world has had the same question or problem that you have. The Internet makes it possible for

you read all about it. Just access [www.google.com](http://www.google.com) and type in a question or phrase that describes your problem or what you want to do, for example, “slant title cell 45 degrees.”

## **What Tricks Did She Do?**

If you attended the lecture or purchased a tape of the lecture, you might want to know which features of Excel I demonstrated so you can look them up in Excel or online Help and try them for yourself. Following is a list.

### ***Embed comments***

### ***Sort***

### ***Format the date***

#### ***For dates before 1900:***

I demonstrated the use of a small shareware add-in called Xdate. For more details, see [jwalk.com/ss/excel/files/xdate.htm](http://jwalk.com/ss/excel/files/xdate.htm)

### ***Worksheets***

**Copy or rename**

**Move them around**

### ***Hide columns and rows***

### ***Freeze columns and rows***

### ***Prepare for printing***

**Rows to Repeat at Top**

**Print Preview**

**Page Headers/Footers**

### ***Import GEDCOM files with WebtoExcel***

I demonstrated the use of the WebToExcel program to convert GEDCOM files into Excel-readable files. For more information, see [erosenbaum.netfirms.com/webtoexcel.shtml](http://erosenbaum.netfirms.com/webtoexcel.shtml)

### ***Create a Template***

### ***Census Tools Templates***

In the *Spreadsheet Tricks* lecture, the use of special templates for collecting census data, ship passenger lists, and other information was shown. These templates are available from [www.censustools.com](http://www.censustools.com).

***Make a Census Worklist***

I demonstrated how to create a list of ancestors names—one column for first name, a second column for surname; then add headings for the census years from 1790 to 1930.

**Rotate headings**

**Format column width**

***Shortcuts***

**Insert a line break: Alt/Enter**

**Set Text Wrap: Ctrl/1 > Alignment > Wrap Text**

**Move between sheets: Ctrl/Page Down – Ctrl/Page Up**

**Zoom in/out: Control/Mouse wheel**

**Double-click on the right side of a cell to expand cell contents**

**Right Click to bring up menu**

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