

Using Spreadsheets to Track and Organize Your Research

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What is a spreadsheet? A spreadsheet is an electronic document used to gather and track data. Information is stored in columns and rows to create a visual representation of the data.

How can a spreadsheet help track research?

- Simple to use
- Gather, store and sort data for analysis
- Find patterns, compare information and correlate data
- Use formulas for calculations

What type of spreadsheets can be created?

- Research logs
- Timelines
- Census data
- City directory data
- Tables to sort and analyze information
- Locality guides
- Glossary and word lists

Keyboard Shortcuts		
Task	MAC	PC
Undo	Command + Z	Control + Z
Redo	Command + Y	Control + Y
Copy	Command + C	Control + C
Cut	Command + X	Control + X
Paste	Command + V	Control + V
Bold	Command + B	Control + B
New Doc	Command + N	Control + N
Find	Command + F	Control + F
Add new line to cell	Command + Opt + Enter	Alt + Enter

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Creating and using an Excel spreadsheet:

- Excel is a Microsoft Office program. If the Windows Office package is not already on your computer, it will need to be purchased in order to use Excel.
- The program and documents created will be stored on your computer.
- Benefits: Excellent sorting capabilities with the table function, easy to use, has many detailed functions not available in Google Sheets.

How To Create and Use an Excel Spreadsheet		
Task	Step 1	Step 2
Open a new document	Command/Control + N OR use the “New Document “ icon	---
Name a new document	Click Save As (floppy disk icon)	Name file and specify a location
Save document	Save document manually by clicking Save (<i>do this often</i>)	---
Add data to cell	Double-click in a cell in order to input data	---
Adjust columns	At the top of the column, move the column dividers to the desired width	---
Auto-fill a cell	Start typing in cell and duplicate data will be automatically propagated into a sub window	Click on correct data to fill the cell
Fill a column with duplicate information	Click in cell to duplicate, then hover over the bottom right corner of the column until a black square appears	Double click to fill the column with repeat information
Add worksheets to a document	At the bottom of the page, click the sheet tab with the + symbol	Double click in the new sheet tab to name or rename the sheet tab
Use the “ find ” feature	Command/Control + F	In the pop-up window, enter the data you want to find
Turn Excel spreadsheet into table	Highlight table area	Insert >> Table
Clear a cell	Select cell	Press Delete key
Merge cells	Highlight desired cells to merge	In Home tab, click Merge or Merge & Center

Creating and using a Google Sheets spreadsheet:

- Google Sheets is a free spreadsheet program that maintains files online in your Google Drive.
- All Gmail accounts give access to your personal Google Drive.
- Benefits: free, accessible online from any computer, saves automatically, and is shareable with others.

How To Create and Use a Google Sheets Spreadsheet		
Task	Step 1	Step 2
Create a new document	Click on the New button in top left side of the page	Click Google Sheet
Name document	Click in the box named "Untitled Document" in upper left-hand side of the page	Type the desired document title
Save document	Document saves automatically when online	---
Add data to cell	Double-click in a cell in order to input data	---
Adjust columns	At the top of the column, move the column dividers to the desire width	---
Auto-fill a cell	Start typing and duplicate data will be automatically propagated into a cell	If the information is correct, tab out of the cell to fill, otherwise keep typing
Fill a column with duplicate information	Type data into the top cell in a column, then hover over bottom right corner of the cell to duplicate until a blue square appears	Double click and the column will fill the repeat information
Add multiple sheets to a document	Click the "+" button at the bottom of the page near the main tab	Double click in the new tab to name or rename the tab
Use the find feature	Command/Control + F , enter data to find	---
Clear a cell	Click into cell	Click Delete
Merge cells	Highlight desired cells to merge	In the toolbar, click the merge icon

How can I sort using an Excel table?

- Create table as noted above.
- The table will fill with colored rows. All items in a row will then be locked together as one element.
- Click on the arrow at the top of a column to open a sort window for that column.
- Start typing in the term you are looking for.
- All rows with that value will be sorted together.
- Move the sort window, if needed, to see data.
- Clear filter when you are finished.

How do I get help learning to use spreadsheets?

- Google the task you are trying to accomplish or the problem you are trying to solve.
- Read books:
 - Harvey, Greg, PhD. *Microsoft Excel 2016 All-In One for Dummies*. Hoboken, N.J. : John Wiley & Sons, Inc. , 2016.
- Visit my website to learn more: <https://lisastokesheritageresearch.com/>

Thank you for attending my class! Please feel free to contact me with questions or comments:

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