

EXCEL FOR GENEALOGISTS



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Excel and other spreadsheet applications are excellent for analyzing genealogical data. Spreadsheets can be built in any way that is needed to compare data side by side or calculate timelines. The program is malleable to whatever is needed. But it is not a genealogical application like FamilyTreeMaker or RootsMagic.

Analysis can be done simply by placing data adjacent to detect patterns and trends. Excel tools for analysis covered in this presentation are Sorting, Filtering, Color Coding, Pivot Tables, Calculations, Data Manipulation.

A spreadsheet is made of COLUMNS and ROWS. Where these columns and rows intersect is a CELL. The cell is the main unit of a spreadsheet that holds *one* data element. In class, you saw examples of custom spreadsheets used to

- create an immigration timeline
- a research log
- analysis of FamilySearch images to find all family members
- a newspaper database
- a pivot chart to calculate the average ages of family members based on several census records
- download DNA matches from 23andMe for analysis
- download search results for FamilySearch

Excel's strength lies in its formulas and calculations. For genealogists calculating the difference between two dates helps build a timeline. There are several ways of working with dates, as shown in the class, but DATEDIF is the most useful. In a cell type in the following formula and replace the variable with cell locations.

=DATEDIF(beginning date cell, ending date cell, "interval unit" in quotes)

The interval unit is chosen from the chart below.

Unit	Meaning	Explanation
Y	Years	Number of complete years between the start and end dates.
M	Months	Number of complete months between the dates.
D	Days	Number of days between the start date and end date.
MD	Days excluding years and months	The date difference in days, ignoring months and years.
YD	Days excluding years	The date difference in days, ignoring years.
YM	Months excluding days and years	The date difference in months, ignoring days and years.

An important limitation of Excel is that dates before 1900 are not recognized as dates but as text. Calculations cannot be performed on text. Excel transforms all dates into a background number, with 1 Jan 1900 equal to 1; 2 Jan 1900 equals 2; 3 Jan 1900 equals 3 and so on. It is these values in the background that are used for calculations. Dates before 1 Jan 1900, are not converted to numbers in the background because they would equal less than 1.

A method of overcoming this limitation is to add 2000 to the year of any date. Write January 1, 1800, as January 1, **3800** instead and Excel will now recognize it as a date and assign a background value for calculations.

One of the best free educational tools for Excel is YouTube. There are several YouTube channels dedicated to Excel teaching from beginner to expert levels. Below are some channel options. Each image is hyperlinked to the YouTube channel. Leila Gharani's channel is one of my favorites, but her teaching can be quite advanced.

