



HOW TO CREATE A GENEALOGY RESEARCH PLAN IN EXCEL

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Have you ever found yourself going around in circles or wondering what you should do next? Genealogy research involves a lot of ancestors, lines of inquiry and sources. It can be difficult to stay focused. That's where a simple Excel spreadsheet can make all the difference. By creating a structured, trackable plan, you can work more efficiently and get back on track if you wander off. Let me show you how to create a flexible, customisable research plan using Excel—no fancy tools, formulas or complicated templates required.

Why you need a Genealogy Research Plan

Sure, it is fun to wander and chase interesting stories. That's part of the attraction of family history research. But if you want to achieve something, you need a plan. Having a plan allows you the luxury of wandering off now and then. If you have one, you can always find your way back.

A genealogy research plan identifies:

- the questions that you want to answer
- the information that you need, and
- the sources you need to examine.

You can also include a research log to track your progress.

Why use Excel for Family History Research Planning?

Excel, or a similar spreadsheet program, is available for free. And it is pretty simple to use.

Excel is also very flexible, so you can customise it to your own needs.

Genealogy Research Planning Unit

To create a research plan you first need to choose the research planning unit. By that I mean - Are you going to produce a plan for:

- each research question
- each person



- each family group
- each surname, or
- a project?

The example I have used here is for a family group, which is the unit that I find most useful in my own research.

How to Structure your Genealogy Research Plan

You can have multiple worksheets in a spreadsheet and this is very useful for a research plan, because each worksheet can have a different function and format, but are still kept within a single file.

For this demonstration we will use three worksheets:

- a summary of information about the family
- a plan and log, and
- a search plan.

At the bottom of each worksheet there is a tab. Double click on Tab 1 and rename it Family Group. Use this sheet to summarise key information about the family, such as

- their names,
- name variants,
- birth date and location,
- marriage date and location,
- death date and location, and
- their literacy levels.

	A	B	C
1		Husband	Wife/partner
2	Names or subjects (& ID)		
3	Name variants		
4	Birth date / place		
5	Marriage date / place		
6	Death date / place		
7	Literacy - can they read / write?		
8			
9	Other locations		
10			
11	Research objectives, key issues		
12	Comments		

Example of a Family Group worksheet



Double click on Tab 2 and rename it Research Plan. This is your main worksheet.

On worksheet no. 3, create a Search Plan for this family group (follow the instructions in my blog post Using Excel to Manage Searches) and rename the Tab.

Key Columns for your Genealogy Research Plan

A key benefit of creating a research plan in Excel is that you can include a lot of information in a single plan, then manipulate the information into manageable subsets using filters.

Where possible, set up columns that can utilise the filter feature. To do this, you need to standardise how you enter data in the column – for example, Column I below has just two answers, Open or Closed.

Here are the columns that I use:

Column A – Research question or hypothesis. List all of your research questions and hypotheses for this family group.

Column B – Information needed. List the information needed to answer each question or hypothesis. You will need more than one row per question/hypothesis.

Column C – Source. List the sources you intend to search for the information. You should have more than one source for each piece of information.

Column D – Repository. List the repositories you intend to search for the sources. You may have more than one repository for each source.

Column E – Source citation. When you find the source, add the source citation here.

Column F – Analysis. Analyse the source and the information and summarise key points here.

Column G – Notes. Has the question has been satisfactorily answered, has the hypothesis been supported or refuted? Is more research required?

Column H – Tree updated. Update your family tree and mark it off here.

Column I – Status. This allows you to track whether the research task has been completed or whether it still needs work. Open = still being researched, Closed = research on this question or hypothesis is complete

	A	B	C	D	E	F	G	H	I
1	Research question or hypothesis	Information needed	Source	Repository	Source citation	Analysis	Notes	Tree updated	Status
2									
3									
4									
5									
6									
7									
8									

Columns for the Research Plan worksheet. Adjust column widths as required.



Add your Data and Filter the Information for Planning

Start filling in the columns, then add filters.

To add filter buttons to each column: Click in Cell A1, click on the Data Tab, then click on the Filter button. This adds a little drop-down arrow to each column.

	A	B	C	D	H	I
	Research question or hypothesis	Information needed	Source	Repository	Tree updated	Status
1	Who were Sophia's parents?	Birthdate and birthplace	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
2	Who were Sophia's parents?	Name of mother	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
3	Who were Sophia's parents?	Name of father	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
4	When did Sophia marry John Squires?	Date of marriage	Sophia's death certificate	NSW Registry Births Deaths and Marriages	Yes	Closed
5	When did Sophia marry John Squires?	Date and place of marriage	Sophia's marriage certificate	NSW Registry Births Deaths and Marriages	Yes	Closed
6	What were the names of Sophia's children?	Names, dates of birth, father's names	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
7	What were the names of Sophia's children?	Names, dates of birth, father's names	birth certificates	NSW Registry Births Deaths and Marriages		Open
8						

Data entered and filters added to each column. Columns E-G hidden in this example.

You can use the drop-down arrows to filter the data using any column. This is particularly useful if you end up with a large plan and you want to focus in on just a subset of the data for planning or printing purposes.

Here are just a couple of filtering examples:

	A	B	C	D	H	I
	Research question or hypothesis	Information needed	Source	Repository	Tree updated	Status
1	Who were Sophia's parents?	Birthdate and birthplace	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
2	Who were Sophia's parents?	Name of mother	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
3	Who were Sophia's parents?	Name of father	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
4						
9						

Use a filter on Column A to show all tasks for a particular research question. Columns E-G hidden in this example.

	A	B	C	D	H	I
	Research question or hypothesis	Information needed	Source	Repository	Tree updated	Status
1	Who were Sophia's parents?	Birthdate and birthplace	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
2	Who were Sophia's parents?	Name of mother	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
3	Who were Sophia's parents?	Name of father	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
4	What were the names of Sophia's children?	Names, dates of birth, father's names	Sophia's death certificate	NSW Registry Births Deaths and Marriages		Open
7	What were the names of Sophia's children?	Names, dates of birth, father's names	birth certificates	NSW Registry Births Deaths and Marriages		Open
8						
9						

Use a filter on Column I to show just the tasks that are still open. Columns E-G hidden in this example.



Get started with your Excel genealogy research plan today

An Excel genealogy research plan will help you navigate your way through family history research. By recording your research questions, identifying your sources and tracking your searches you'll stay focused. Whether you've been researching for years or just getting started, this approach brings clarity and direction to your work. Give it a try—and see how a simple spreadsheet can transform the way you research.

For more articles and information about using Excel in family history, head to the Excel page.

For more on research planning, see Plan Your Family History (<https://generationsgenealogy.com.au/research-methods/plan-3/>)

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