



# USE EXCEL TO PLAN & MANAGE FAMILY HISTORY SEARCHES

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Are you tired of repeating the same family history searches without realising it? Or struggling to remember which repositories you've already checked for your ancestors? An Excel genealogy search plan can transform your research from haphazard to systematic. This simple tracking system helps you document your searches, avoid duplicates, and plan your research more effectively.

## Why Most Family History Searches Fail (And How Excel Fixes This)

I used to think that the mistake I was making with my genealogy research was that I was conducting searches that I had already undertaken. I was wrong.

In fact, duplicating your search is a good strategy, in the right circumstances. If you repeat a search you may discover sources that were not available last time you checked. You may also get improved results because your knowledge about the family or about the sources has improved, or because there are new search tools available.

No, the biggest problem with the way most of us search is that we are not systematic enough and we do not make decent notes about what we have searched.

An Excel genealogy search plan solves both of these problems and it gathers information that you can then use to create your source citation.

## When to Use a Genealogy Search Plan

I do not use a search plan all the time, but there are situations where it can be useful. For example, if I am having a lot of trouble finding someone or something, or if there is conflicting evidence and a systematic approach is required to resolve the conflict.

A genealogy search plan can also be useful if you are researching a location which is unfamiliar to you and you want to be sure you do not miss any important collections.

## Step 1 Create Your Excel Genealogy Search Table

A good search plan documents: when, where, what and how. This information can then inform subsequent searches.

Create these columns and format them:

- A. Name
- B. Objective
- C. Date



- D. Repository
- E. Collection
- F. Criteria – date range
- G. Criteria – surname
- H. Criteria – location
- I. Criteria – any other details

**Explanation:**

**Objective** – what information are you looking for? Having a specific objective helps you target your search. It determines where you look and what search criteria you use.

**Date** – the date you searched

**Repository** – this could be online or offline, e.g. Ancestry or NSW State Library

**Collection** – repositories gather sources into collections or databases. Which one did you search?

**Criteria** – which search terms and date ranges did you try?

	A	B	C	D	E	F	G	H
1	Name	Objective	Date	Repository	Collection	Criteria - dates	Criteria - location	Criteria - other
2								
3								
4								
5								
6								
7								
8								
9								

**Step 2 Add Filters to Your Table for Better Research Management**

The main benefit of creating your search plan in Excel is that you can add filters. This helps you manage the data and plan new searches based on what you have already done.

**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.

You can use the drop-down arrows to filter the data using any column. You could, for example, filter the plan to show all searches conducted for a particular objective or for a particular repository and/or collection. Do this before you decide on your next search.

	D	E
	Repository	Collection



### Step 3 Create Genealogy Research Checklists

You often need to conduct similar searches for different people, because they have something in common. You can systematise these searches by creating checklists for different categories.

For example, you might make a checklist of collections to search for everyone who lived in London or a checklist of collections to search for everyone who was transported to Australia as a convict.

Create a new file and then start a new worksheet for each category and save the file. I call mine Search Checklists. Whenever you have a search plan that relates to one of your categories, copy the worksheet for that category from the Search Checklists file to the search plan file for that person.

**To copy a worksheet:** right click the tab for that worksheet and select Move or Copy, tick the box that says Create a Copy and select the file that you want to copy it to.

If you search the internet you may find that someone has already created a checklist for your category, or has a guide that you can use to create your own. For example, I used the NSW State Archives Convict Guide and the Australia-Convicts page on the FamilySearch Wiki to create this example checklist for convict research.

	A	B	C
1	<b>SEARCH CHECKLIST - CONVICTS</b>		
2	<b>Repository</b>	<b>Collection</b>	<b>Searched (Y/N)</b>
3	NSW State Archives	Convicts Index 1791-1873	
4		Convicts Indents 1788-1801	
5		Convict Assignments 1821-1825	
6		Convict Applications to Marry 1825-1851	
7		Convict Exiles Index 1849-1850	
8	Ancestry	Convict Records Index 1787- 1867	
9		List of Convicts with Particulars, 1788-1842	
10	National Archives UK	Convict Transportation Registers 1787-1870	
11			

Please note that this is just an example checklist for convicts for demonstration purposes. It is not an exhaustive list of repositories or collections for convict research.

The purpose of a checklist is to suggest collections for searching. You still need to add the actual searches to your search plan.



## Improve Your Family History Searches with Excel

This Excel genealogy search tracking system transforms haphazard family history research into an organised, systematic approach. By documenting your searches, you'll avoid wasted time and conduct a more thorough search for the best sources.

### Related Articles:

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