



# USING EXCEL TO TRACK BIRTH DEATH AND MARRIAGE RECORDS

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Have you ever purchased a birth, death or marriage record for your family history only to discover that you already had it?

Many genealogists waste money buying duplicate vital records. This Excel tracking system creates a list of your birth, death, and marriage certificates to help you avoid duplicate purchases and plan future research efficiently.

Birth, death and marriage records are essential sources in genealogy research, because they usually contain information which helps to establish identity and relationships between people. They also establish details around key events in a person's life. With a few exceptions, such as probate events, life events all occur between a person's birth and death.

Birth, death and marriage records may be government records, usually referred to as certificates; or church records, such as baptisms or burials. The BDM index can include all of these types.

Over the course of family history research, you will probably obtain hundreds of birth, death and marriage records. In some cases these records may be obtained for free, but often they cost money. Organising family history records becomes crucial as your collection grows.

You could keep track of the records by saving them all in a centralised folder and naming them appropriately. However, the added benefit of a BDM index is that it can be used to prioritise which records you need to obtain next. This makes it a useful tool in research planning.

These instructions assume a basic knowledge of Excel. If you do not know how to use Excel, I recommend viewing a YouTube tutorial first. This genealogy spreadsheet method works with any version of Excel and can be adapted to other spreadsheet programs.

## Step 1: Create your Excel BDM index

Create these columns and format them to stand out. I like bold headings with shading, and I alter the width of the columns as needed.

- |                                  |                 |
|----------------------------------|-----------------|
| A. Surname                       | F. Country      |
| B. First name                    | G. State/county |
| C. ID (unique identifier number) | H. Reference    |
| D. Type (of record)              | I. Status       |
| E. Year                          |                 |



*Explanation:*

ID – This is the unique identifier number from your Family History software, if you use such software. The ID helps to distinguish between two people of the same name.

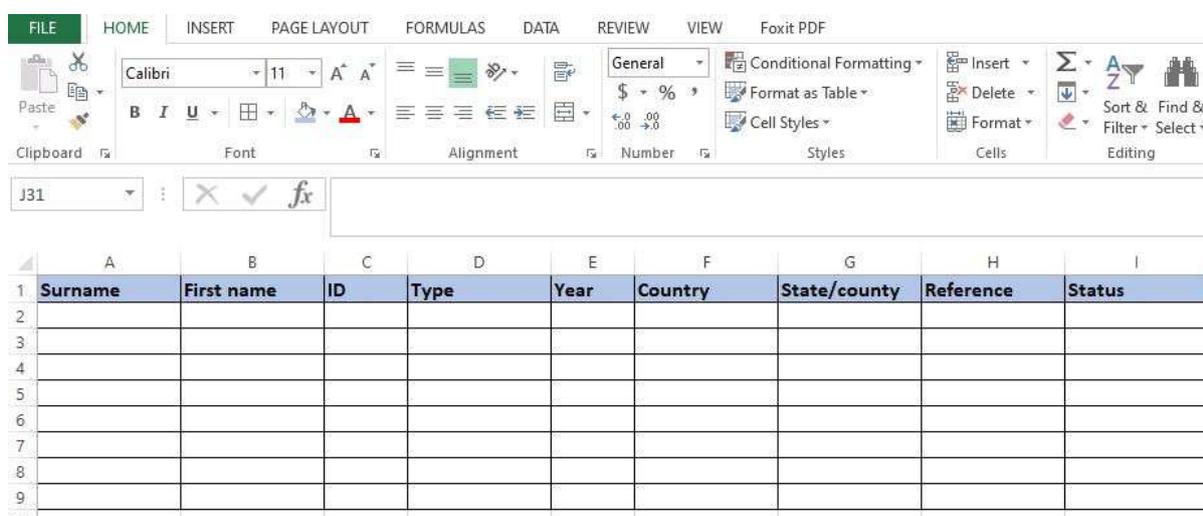
Type – Birth, baptism, marriage, death, burial.

Year – of the event or record.

Country and State/County – of the event or record. This helps you identify where to look for it.

Reference – any descriptors for the record, such as those provided by a Registry index.

Status – This is the column that records whether you have it yet. I use Order 1 (top priority), Order 2, Received, Blank.



**Step 2: Enter birth death and marriage data to your Excel index**

Start filling in the table. Each person needs to be entered two to three times, for birth, marriage and death. Be careful not to list a marriage event against both members of a couple. Choose one person to list them under. It does not matter which, provided you are consistent.

You do not have to enter everyone in your family tree. This vital records tracking system works best when you focus on active research subjects. You might take a systematic approach by adding your four grandparents first then working your way back in time.

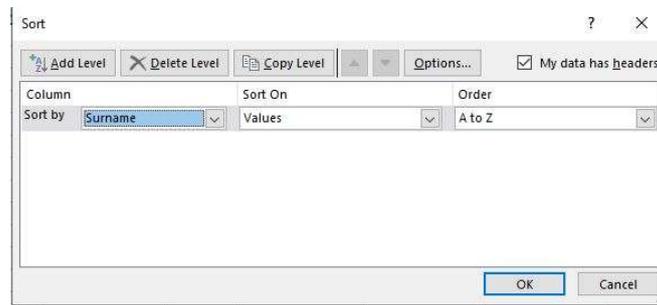
It does not matter which order you enter them in. You can sort them in Step 3.

	A	B	C	D	E	F	G	H	I
1	Surname	First name	ID	Type	Year	Country	State/country	Reference	Status
2	Hend	Henry	6	birth	1905	Australia	NSW	1905/9136	Received
3	Hend	Henry	6	marriage	1934	Australia	NSW	1934/9662	Received
4	Hend	Henry	6	death	1992	Australia	NSW	N/A	N/A
5	Rusten	Ivy	7	birth	1915	Australia	NSW	1915/43942	Received
6	Rusten	Ivy	7	death	1940	Australia	NSW	1940/723	Order 1
7	Hend	James	8	birth	1878	Australia	NSW	1878/24215	Received
8	Hend	James	8	marriage	1899	Australia	NSW	1899/9180	Order 2
9	Hend	James	8	death	1975	Australia	NSW	1975/616	Order 1



### Step 3: Organise your BDM records: Sorting and filtering tips

Sort the entries in a way that makes sense to you. I tend to sort by surname, but you can sort by any column. The Sort button is on the Data Tab.

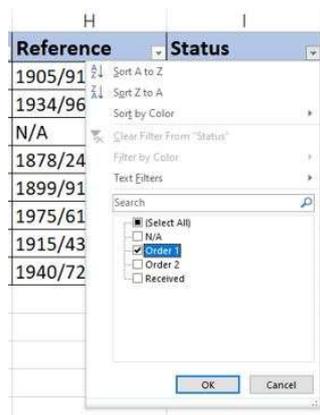


*Add filter buttons to each column:*

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.

For example, I can create a subset of my table which just shows the records that need to be ordered next. I click on the arrow in the Status column, unselect all options except for Order 1, click OK.



	A	B	C	D	E	F	G	H	I
1	Surname	First name	ID	Type	Year	Country	State/county	Reference	Status
7	Hend	James	8	death	1975	Australia	NSW	1975/616	Order 1
9	Rusten	Ivy	7	death	1940	Australia	NSW	1940/723	Order 1

You can use the filter button to create any subset you need, such as all the people of a particular surname or every record from a particular location.

To clear the filters and see the full table again, follow the same steps as you did to add the filters: Click in Cell A1, click on the Data Tab, then click on the Filter button. I like to clear the filters each time before I save and close the index, so that the full table is revealed next time I open it.



This Excel tracking system transforms chaotic family history records management into an organised research tool.

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