Teaching Genealogists AI™
Instructor: Sylvia Vargas

Getting Started in Genealogy

Google Sheets Templates – Setup Guide

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Overview

This guide provides specifications for three Google Sheets templates you can build for free. Each template includes column headers, sample data, and guiding questions embedded as cell notes to help beginners stay on track.

To create each sheet:

1. Open https://sheets.google.com
2. Click **Blank spreadsheet**

3. Rename the spreadsheet (see naming suggestions below)
4. Set up the columns as described
5. Add the guiding questions as **cell notes** (right-click a header cell > "Insert note")
6. Enter the sample data in Row 2 as an example for users

Template 1: Family Information Tracker

Spreadsheet name: My Family Information Tracker
Purpose: Record the basic facts about each person in your family tree (Module 1)
Tab name: Family Info

Column Headers (Row 1)

Column	Header	Width	Guiding Question (add as cell note)
A	**Full Name**	200px	What is this person's full legal name? Include both surnames if known.
B	**Relationship to Me**	150px	How is this person related to you? (e.g., mother, maternal grandfather, paternal great-grandmother)
C	**Date of Birth**	120px	When were they born? Use the format: DD Mon YYYY (e.g., 15 Mar 1905). Write "unknown" if you don't know.
D	**Place of Birth**	200px	Where were they born? Include pueblo and barrio if in Puerto Rico, or city and state if in the US.
E	**Date of Marriage**	120px	When did they marry? If married more than once, add a note.
F	**Place of Marriage**	200px	Where did they marry? (church name, pueblo, or city/state)
G	**Spouse's Full Name**	200px	What is the full name of their spouse? Include maiden name for women.
H	**Migration**	250px	Did they move? From where to where? When and why?
I	**Date of Death**	120px	When did they die? Write "living" if still alive. Do NOT share details about living persons publicly.
J	**Place of Death**	200px	Where did they die?
K	**Source of Information**	250px	How do you know this? (e.g., "Mom told me," "birth certificate," "FamilySearch record")
L	**Notes**	300px	Anything else? Nicknames, alternate spellings, questions to research.

Sample Data (Row 2)

A	B	C	D	E	F	G	H	I	J	K
Juan Vargas Rivera	Maternal grandfather	15 Mar 1905	Barrio Pueblo, Rincón, PR	~1928	unknown	María López Santos	Moved to New York ~1945 for factory work	22 Nov 1980	Bronx, New York	Interv with Mom, Feb 2

Additional Setup Notes

- **Freeze Row 1** so headers stay visible as you scroll (View > Freeze > 1 row)
- **Bold Row 1** and give it a light background color (e.g., light blue)
- **Start a new row for each person**, working backward from yourself
- Suggested order: You > Parent 1 > Parent 2 > Grandparent 1 > Grandparent 2 > Grandparent 3 > Grandparent 4

Template 2: Research Log

Spreadsheet name: My Family Research Log
Purpose: Track every search you conduct, including negative results (Module 4)
Tab name: Research Log

Column Headers (Row 1)

Column	Header	Width	Guiding Question (add as cell note)
A	**Date**	100px	When did you do this search? Use YYYY-MM-DD format.
B	**Ancestor**	180px	Who are you researching? Use their full name.
C	**Search Goal**	200px	What are you trying to find? Be specific. (e.g., "Find birth record" not just "research")
D	**Where I Searched**	300px	What website, collection, or archive did you search? Be specific: include the collection name, pueblo, and date range.
E	**What I Found**	300px	Describe what you found. If nothing, write "NOT FOUND" – this is important!
F	**Source / Citation**	300px	Write enough info so you could find this record again. Include: collection name, entry number, page, website, and date accessed.
G	**Next Step**	250px	Based on this result, what will you do next? Every search should lead to a next action.

Sample Data (Row 2 – Successful Search)

A	B	C	D	E	F	G
2026-02-17	Juan Vargas Rivera	Find birth record	FamilySearch, "Puerto Rico, Civil Registration, 1885-2001," Rincón, Nacimientos 1900-1910	Found: born 15 Mar 1905, Barrio Pueblo, Rincón. Parents: Pedro Vargas Colón, María Rivera Santos. Entry #47, p.24	PR Registro Demográfico, "Rincón, Nacimientos, 1905," entry 47, p.24; digital image, FamilySearch; accessed 17 Feb 2026	Search for parents' marriage record in Rincón, ~1900-1905

Sample Data (Row 3 – Negative Result)

A	B	C	D	E	F	G
2026-02-17	Juan Vargas Rivera	Find marriage record	FamilySearch, "Puerto Rico, Civil Registration, 1885-2001," Rincón, Matrimonios 1920-1930	NOT FOUND – no marriage record for Juan Vargas Rivera in this collection and date range	–	Try church records (Parroquia de Rincón); check neighboring pueblos Añasco and Aguada

Additional Setup Notes

- **Freeze Row 1**
- **Bold Row 1** with a light background color
- **Color-code the "What I Found" column:** Use light green fill for found records, light red or pink fill for NOT FOUND. This makes it easy to scan your log.
- **Sort by date** (newest first) so your most recent work is at the top
- Consider adding a **Data Validation dropdown** for Column E prefixes: "Found:" and "NOT FOUND" (Data > Data validation)

Template 3: Document Checklist

Spreadsheet name: My Document Checklist
Purpose: Track which key documents you have, need, or have searched for each ancestor
Tab name: Document Checklist

Column Headers (Row 1)

Column	Header	Width	Guiding Question (add as cell note)
A	**Ancestor Name**	200px	Full name of the person.
B	**Birth Record**	150px	Do you have their birth record? Use: HAVE / NEED / SEARCHED-NOT FOUND / N/A
C	**Marriage Record**	150px	Do you have their marriage record? Use: HAVE / NEED / SEARCHED-NOT FOUND / N/A
D	**Death Record**	150px	Do you have their death record? Use: HAVE / NEED / SEARCHED-NOT FOUND / N/A
E	**Baptism Record**	150px	Do you have their church baptism record? (May differ from civil birth record)
F	**Census Records**	150px	Have you found them on any census? List which years.
G	**Obituary**	150px	Do you have an obituary?
H	**Photos**	150px	Do you have photos of this person?
I	**Interview Notes**	150px	Have you interviewed anyone about this person? Who?
J	**Notes**	300px	Any additional details, questions, or leads.

Sample Data (Row 2)

A	B	C	D	E	F	G	H	I	J
Juan Vargas Rivera	HAVE (FamilySearch)	NEED	NEED	NEED	1910, 1920 (found); 1930 (not found)	NEED – check Bronx newspapers	Yes – 1 photo from Mom	Mom, 17 Feb 2026	Mom says he came to NY ~1945. Check passeng lists.

Status Values (for Columns B–I)

Use these consistent labels so you can filter and sort:

- **HAVE** – You have a copy or have seen the record. Add where in parentheses.
- **NEED** – You haven't searched yet. This is your next action.

- **SEARCHED-NOT FOUND** – You searched but the record was not there. Note where you searched in the Notes column.
- **N/A** – Not applicable (e.g., death record for a living person).

Additional Setup Notes

- **Freeze Row 1 and Column A** so you can scroll in both directions (View > Freeze > 1 row and 1 column)
- **Bold Row 1** with a light background color
- **Add Data Validation dropdowns** for columns B through I with the four status values above (Data > Data validation > Dropdown)
- **Conditional formatting** (optional but helpful):
  - HAVE = green fill
  - NEED = yellow fill
  - SEARCHED-NOT FOUND = red fill
  - N/A = gray fill
- Add one row per ancestor, starting with yourself and working backward

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Putting It All Together

These three sheets work as a system:

1. **Family Information Tracker** – Your master list of what you know about each person (use from Module 1 onward)
2. **Research Log** – Your diary of every search you conduct (use from Module 4 onward)
3. **Document Checklist** – Your at-a-glance view of which documents you have and which you still need (update as you go)

> **Tip:** You can put all three sheets as separate tabs in a single Google Sheets workbook. Name it something like "My Puerto Rican Family Research" and keep it bookmarked for easy access.

Privacy Reminder

- Do NOT include personal details about living people (addresses, Social Security numbers, phone numbers) in shared spreadsheets.
- If you share your research with others, remove or hide information about living relatives first.
- Google Sheets sharing defaults to "private." Only share with people you trust.