

# Organize Your Research With Google Drive

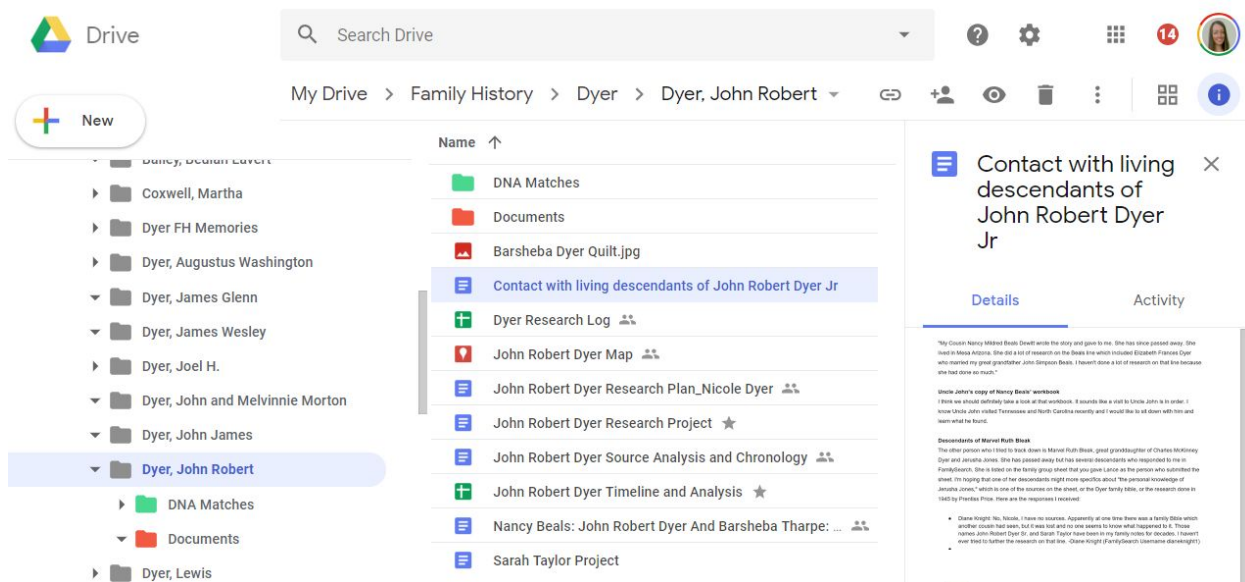
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*Do you work from multiple devices? Laptop, desktop, work computer, home computer, smartphone, iPad? Learn how to utilize the free tools at Google Drive and Google Docs to help you keep your genealogy research organized. You can create research logs with Google Sheets, transcribe records into Google Docs, add document links to records you have saved within your Google Drive files and share your work with other genealogists. The comment feature is a powerful collaborative tool that allows you to give and receive feedback from others. Upload your image files, scanned records, and saved research documents to Google Drive to access them from any device. Sync your devices to back up your precious research online. Search through your Google Drive to easily find documents. No longer will your research documents be scattered in dusty file folders, desktop computers, and under-the-bed boxes. Putting all your research in one place will help you find what you need and make more progress.*

Online Syllabus and additional info: <https://familylocket.com/organize-your-research-with-google-drive/>



## What is Google Drive?

- A safe place for all your files - keep photos, documents, recordings, videos, and more.
- 15 GB of space free with your Google Account, including files and folders you upload or sync; also includes unlimited Google Docs, Sheets, Slides and Forms that you create
- See your files from any smartphone, tablet, or computer
- Easily invite others to view and collaborate on files without an email attachment
- <https://www.drive.google.com> and Mobile Apps: <https://get.google.com/apptips/apps/#!/all>

## Get started with Google Drive

- How to use Google Drive - upload files, create files, share and organize files.<sup>1</sup>
- System requirements and browsers <sup>2</sup>
  - Computer Browsers: Chrome, Firefox, Internet Explorer 11, Microsoft Edge, Safari
  - Computer Operating systems for Backup and Sync: Windows 7+, Yosemite (10.10)+
  - Android: version 4.4 or up for Google Drive app, Android version 5.5 or up for Google Docs, Sheets, and Slides apps
  - iPhone & iPad: iOS 10 or up for Google Drive and Google Docs, Sheets, & Slides apps
- Use files offline with the Google Docs Offline Chrome extension or with Backup and Sync <sup>3</sup>
- 15 GB of free storage to use across Google Drive, Gmail, and Google Photos, or buy more <sup>4</sup>

## Store and view files in Google Drive

- Upload files/folders to Google Drive at drive.google.com or with Backup and Sync <sup>5</sup>
- Download a file by right-clicking, then choosing "download."
- File types supported include .PDF, .XLSX, .DOCX, .JPEG, .ZIP, MP3, MPEG4, .MOV and more
- View and open files like videos, PDFs, Microsoft Office files, audio, photos
- Convert PDF and photo files (like newspaper clippings and funeral programs) to text files.<sup>6</sup>
  - Start with a .JPEG, .PNG, .GIF, or PDF
  - Upload the file to Google Drive. Right click and select "open with google docs."

## Organize and find your files

- View your files online at drive.google.com in either list or grid view
  - View details panel with activity log for each item/folder: at top right, Info ⓘ > Activity.
  - View relevant files in the Quick Access panel (to turn off, go to settings)
  - View recently edited files by clicking Google Drive then Info ⓘ (top right).
- Sort your files by name, last modified, last modified by me, last opened by me <sup>7</sup>
- Organize your files in Google Drive <sup>8</sup>
  - Create a folder - on left click New > Folder. Enter a name. Click Create.
  - Move a file or folder - several methods
    - Right click the item and click **Move to** > choose folder; or drag release
    - Save an item to multiple folders: click on the item, press **Shift + z**, then choose the folder you want, and click **Add here**.
  - Make a copy of the file: right-click a file, then **Make a copy**. (files only, not folders)
- Find files using the search bar

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<sup>1</sup> How to use Google Drive <https://support.google.com/drive/answer/2424384>

<sup>2</sup> System requirements and browsers <https://support.google.com/drive/answer/2375082>

<sup>3</sup> Use Google Drive files offline <https://support.google.com/drive/answer/2375012>

<sup>4</sup> Buy more Google storage <https://support.google.com/drive/answer/2375123>

<sup>5</sup> Upload files and folders to Google Drive <https://support.google.com/drive/answer/2424368>

<sup>6</sup> Convert PDF and photo files to text <https://support.google.com/drive/answer/176692>

<sup>7</sup> Sort your files <https://support.google.com/drive/answer/2375177>

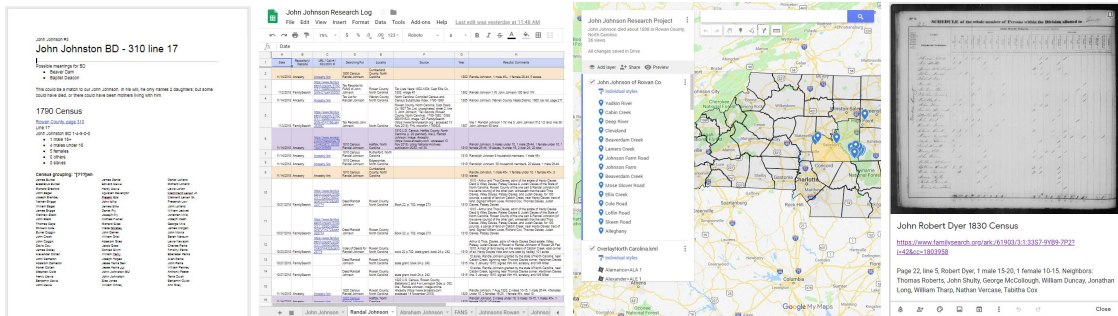
<sup>8</sup> Organize your files in Google Drive <https://support.google.com/drive/answer/2375091>

- Search for keywords in the file title, file contents, items featured in pictures/PDF files/etc.
- Use Advanced Search by clicking the down arrow on the search bar <sup>9</sup>
  - Search for an exact phrase by "using quotes around the phrase"
  - Search by file type - type:spreadsheet (document, PDF, map, audio, video, etc.)
  - Search by owner (owner:dad@gmail.com) and who shared with you (from:)
- View activity & file versions; also save and restore recent versions <sup>10</sup>

## Collaborate with Google Drive

- Share files and folders with relatives, fellow researchers, professional genealogists, clients, etc.
  - You control whether people can edit, comment on, or only view the file
  - Click the file you want to share, click Share
  - Choose to share with specific people, share a link to the file, or share a file publicly
  - Add files to a folder and click Share to share the entire folder. You can share a folder with individuals by email or a Google Group at <https://groups.google.com> <sup>11</sup>
  - Two folder permission options: view only or organize, add & edit
- Make comments on Google Docs, Sheets, Slides: highlight text/cell and click Add comment
- Comment on Microsoft Office files, PDFs, images: At the top right, click Add comment <sup>12</sup>

## Docs, Sheets, Slides, and other apps



Census Transcription Doc

Research Log Sheet

Google My Maps

Note in Google Keep

- Docs - word processor
  - Transcriptions and abstracts of records - place in same folder with record images
  - Research reports - use Ctrl+Alt+F to quickly insert a footnote
  - Sources document - Insert images of records with the citation into a Google Doc - you can have unlimited Google Docs, they do not count against your storage quota in Drive.
  - Type with your voice by clicking Tools > Voice Typing <sup>13</sup>
  - Google Docs Quick Create extension<sup>14</sup> - add this to your browser to start a doc quickly

<sup>9</sup> Find or recover a file > Advanced Search [https://support.google.com/drive/answer/1716222#advanced\\_search](https://support.google.com/drive/answer/1716222#advanced_search)

<sup>10</sup> View activity & file versions <https://support.google.com/drive/answer/2409045>

<sup>11</sup> Share folders in Google Drive <https://support.google.com/drive/answer/7166529>

<sup>12</sup> Comment on Microsoft Office files, PDFs, images, and other files <https://support.google.com/drive/answer/7650301>

<sup>13</sup> Type with your voice <https://support.google.com/docs/answer/4492226>

<sup>14</sup> Google Docs Quick Create Extension <https://chrome.google.com/webstore/category/extensions> > Google Docs Quick Create

- Sheets - spreadsheet
  - Timelines - put your data in chronological order to help you see what's missing
  - Research Logs
    - Within log, create multiple sheets for spouses, various generations, etc.
    - Include URL for the Google Doc transcription and image in Google Drive
    - Sort results in log by record type, repository, locality, etc.
  - Sort DNA matches
- Slides - presentations
  - Present your research to family, your genealogy society, etc.
  - Cheat Sheet <https://gsuite.google.com/learning-center/products/slides/cheat-sheet/>
- Keep - to do lists, notes, etc.
  - Create color coded checklists, voice memos, web clippings, images with notes, etc.
  - Easily create a record transcription with the Google Keep Chrome Extension.<sup>15</sup>
  - Copy notes to a Google Doc by clicking More ☰ then **Copy to Google Docs**.<sup>16</sup>
  - Use Google Doc and Google Keep side by side by using the sidebar.<sup>17</sup>
  - Cheat Sheet <https://gsuite.google.com/learning-center/products/keep/cheat-sheet/>
- Maps - add places to your own maps
  - Create custom maps with Google My Maps <https://www.google.com/maps/>
  - Manage your maps in Google Drive<sup>18</sup> - add them to folders about ancestors
  - About My Maps <https://www.google.com/maps/about/mymaps/>
- Google Photos
  - How Google Photos works with Google Drive<sup>19</sup>
  - Sync photos from Google Drive to Google Photos at <https://photos.google.com/settings> by turning on the Google Drive setting.
  - Organize Photos & Videos using Google Drive
    - Move photos into folders without creating or affecting albums in Google Photos - organize photos into the research folders you have for ancestors
    - Add a photo to multiple folders using the shortcut **Shift + z**, choose folder, click **Add here**. This doesn't make a copy of the photo or take up more storage space, but lets you see an image to more than one location.

## Sync files to your computer

- Backup and Sync files with Google Drive<sup>20</sup>
- On your computer, click Backup and Sync ☁, click more > Preferences.
  - Choose which folders from your computer to back up
  - Choose which folders from your Google Drive to sync for offline use
  - Chose what to do when an item is deleted - delete everywhere or ask
- Back up your .gedcom files and other family tree program files on Google Drive so the file is stored in multiple locations - your hard drive, the cloud, laptop, etc.



Keep your files safe by storing multiple copies in multiple locations.

<sup>15</sup> Google Keep Chrome Extension <https://chrome.google.com/webstore/category/extensions> > Google Keep

<sup>16</sup> Send a Keep note to another app <https://support.google.com/keep/answer/6320648>

<sup>17</sup> Use Google products side by side <https://support.google.com/docs/answer/106237>

<sup>18</sup> Manage your maps in Google Drive <https://support.google.com/drive/answer/6138031>

<sup>19</sup> How Google Photos works with Google Drive <https://support.google.com/drive/answer/6156103>

<sup>20</sup> Back up & sync files with Google Drive <https://support.google.com/drive/answer/2374987>