

Google Docs and Google Sheets for Genealogists

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Accessing Google Docs and Sheets

Everything created in Google Docs, Sheets, or the other Google Apps is accessible via Google Drive (<http://drive.google.com>). Google Drive is an easy way to create new docs/sheets as well. Otherwise, each program is accessible through their respective websites: <http://docs.google.com> and <http://sheets.google.com>.

Google Docs

Google Docs does have some built in templates, but I haven't found them to be quite as useful as those in Sheets. Feel free to explore and try them out!

Text Format Bar/Menu

1. Text Styles: Normal text, Headings, Title, etc.
 - a. Can either use the presets, or "update style to match" what you design it to be.
 - b. Using text styles creates an outline which can be viewed by clicking the "Show document outline" button in the top left of the document window.
2. Fonts: Use "More fonts" to add more to the fonts selection list.

File Menu

1. Standard menu options: Open, New, Rename, Page Setup, Print, etc.
2. Sharing: Give others access to the document for real-time collaboration.
 - a. Sharing options: Viewer, Commenter, Editor
 - b. Share via email or URL link, or add to a Google Calendar event.
 - c. Up to 100 people can edit/view simultaneously

3. Download: Can be downloaded in lots of different formats.
4. Offline availability: Set a file to be available and editable without an internet connection.
 - a. If this file has been shared, your updates will not appear to others until you regain an internet connection.
5. Version History: Can view (and restore!) past versions of your document since auto-save to the cloud is constant.

View Menu

1. Turn on/off: Print Layout, Ruler, Full Screen etc.
2. Mode (can also change on the right hand side of the text format bar)
 - a. Editing = changing document directly (default)
 - b. Suggesting = changes appear as suggestions to you and anyone else.
 - i. The owner of the file can approve or reject suggestions through the comments button (top right chat bubble)
 - c. Viewing = shows final document for viewing prior to printing

Insert Menu

1. Standard options: Insert Image, Page numbers, Headers & Footers, etc.
2. Drawing: A basic, integrated drawing tool with a lot of uses
 - a. Create a basic pedigree chart, insert and mark up images (mark land on a map, etc.), land graphing, etc.
3. Footnote: Note that footnotes are not part of the text styles options like is typical in most word processors.
4. Table of Contents: Either page numbers or links to document headings.

Format Menu

1. Options similar to Text Format Bar, including access to text styles, text spacing, alignment, etc.
 - a. Paragraph Styles: Up to Heading 6 available.
 - b. Bullets & numbering: bulleted list, numbered list, or checklist options available.

Tools Menu

1. Spelling and grammar check, Word count, Review suggested edits, Compare documents, Citations (bibliography), etc.
2. Translate document: Can translate your entire document into any language Google Translate uses.

3. Voice typing: Uses your device microphone to convert speech to text.
 - a. Useful for interview situations, or even analysis and brainstorming.
4. Preferences > Substitutions: Can add anything you would like Google Docs to substitute in for you.
 - a. Turn common abbreviations (dates, locations) into the full word.
Helpful for data entry (substitutes in the case you use).

Google Sheets

Text/Cell Format Bar/Menu

Many options are the same as in Google Docs. Other buttons include quick cell format options (currency, percent, increase or decrease decimal places), cell border and merge options, text alignment and rotation.

Templates

1. Some templates and their potential uses: To-do list (research checklist); Travel planner (for research trips); Pros and cons (evidence analysis tool); Invoice/Timesheet/Expense reports; Assignment tracker (project/blog management).

Edit Menu

1. Paste Special: Allows you to paste only a portion of what you copied.
 - a. Paste values (cell contents), formatting, even column width.
2. Delete options: Also available via the right-click menu.

View Menu

1. Freeze: Set rows or columns to remain in view while scrolling through the spreadsheet.
 - a. Useful for sheets with a lot of entries (research logs, timelines) - headings remain visible while scrolling.
 - b. Can freeze both columns and rows simultaneously.

Insert Menu

1. Inserting Rows/Columns: Select rows/columns in the sheet *first*, insert that many rows/columns at once. (Same via right-click menu.)
2. Checkboxes: Easily turn cells into items that can be checked off.

Format Menu

1. Number: Customize how dates and other data appear.
2. Conditional formatting: Set rules so that cell style automatically changes based on content.
 - a. Useful for drawing attention to locations, names, record types, duplicates, etc. (Duplicates: COUNTIF (range, starting cell))
 - b. Can be based on cell contents, dates, values, or custom formulas.
3. Alternating colors: Automatically set alternating colors for easy viewing.

Help Menu

1. Keyboard shortcuts: Selecting all or portions of the sheet, quick navigation, etc.
 - a. My favorites: Ctrl+Space = select column; Shift+Space = select row, Ctrl+Shift+(left, right, up, down) Arrow = select in the chosen direction to end of values or sheet

Helpful Tips

1. Selecting multiple rows/columns prior to resizing changes the entire selection to match.
2. Clicking the square between A and 1 selects the whole sheet.
3. Right-click on a sheet to view sheet options menu: renaming, copying, color coding, etc.
4. Ctrl+Enter = New line in a cell (since Enter sends you to the next cell down).
5. Right-click on a cell: See edit history for that cell.
6. Hover between column/row letters/numbers until the double arrow is visible, double click to auto resize column/row to fit content.

Examples

1. Research Log: <https://bit.ly/2MfDyEZ>
2. Family Timeline: Same as above, see sheets at the bottom of page.
3. Census Chart: <https://bit.ly/3HOREqf>
4. Timesheet: <https://bit.ly/3nYtMov>
5. Goal Tracker: <https://bit.ly/2KyLHUB>