

Technology your "Connected Family" Can Use to Facilitate Collaborative Projects

If your family, trustees or staff are geographically dispersed or work different schedules, you may find challenges in coordinating collaborative work.

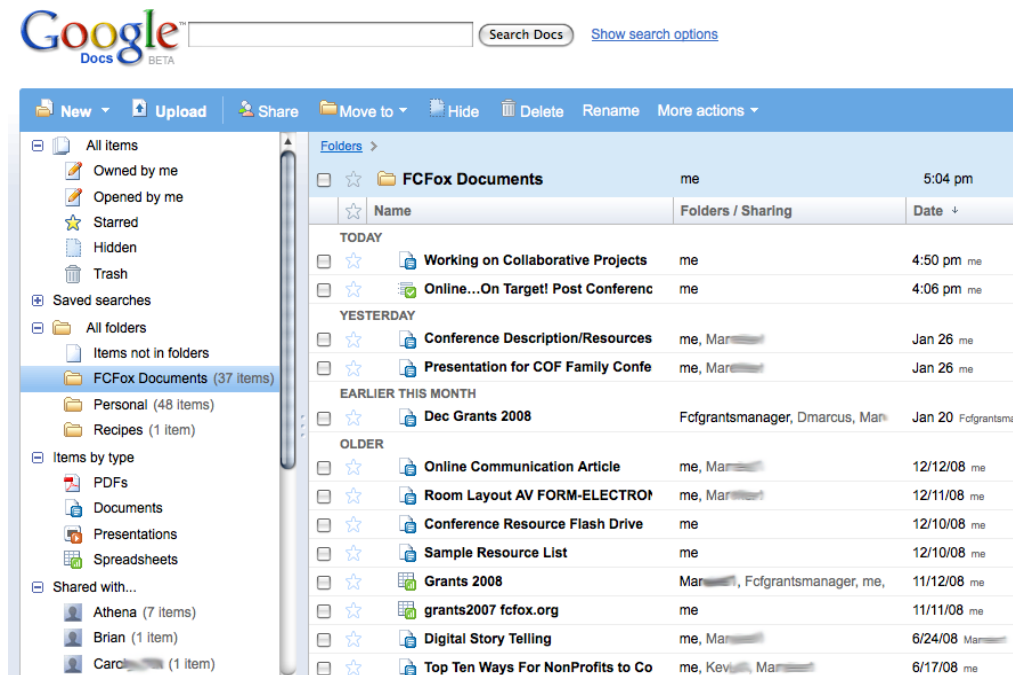
Most of us have experienced difficulties in sharing a document for comment by multiple users. Following the email thread and various versions in circulation can prove frustrating and undermine the entire process and goals. In other situations, we find ourselves hindered in gathering or sharing information by virtue of distance or scheduling conflicts.

Once the sole domain of programmers and "techie", technologies for shared documents, spreadsheets, and data collection surveys are now available to the average user, courtesy of several companies including ZoHo Writer, Microsoft Office Online, Survey Monkey and Google Docs.

In this session, we'll feature Google Docs, because it is free, easy to use, and accessible to anyone with a free Google account log-in. With Google Docs, you have several services and organizational functions available to you, including the ability to share documents you created in MS Word, or Excel, for example, with others, stored online where collaborators can work on the same document at the same time without revision confusion. And, Google Docs auto-saves everyone's work, so that even if your Internet goes down, or your hard drive crashes, your work is safe and you can access it from any computer anywhere!

Google Docs - The basics

The graphic below is a screenshot of the Google Docs interface.



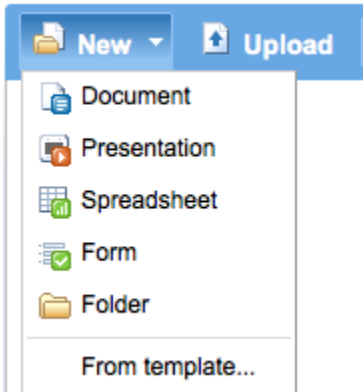
Main Window: The main window displays all your individual projects, in date order, most recent first. It also shows you whom you have invited to collaborate with you on each document.

Left Menu: The left side of the screen lets you

- Sort and find your documents by owner, or folder or type of document
- See all the contacts you have collaborated with in the past, and
- Label important, frequently used or unfinished documents with a "star."

Top Menu Bar: The blue menu bar across the top is your quick access for tasks such as:

- Creating new documents
- Uploading documents from your computer
- Sharing documents with family, friends and other collaborators
- Moving documents into folders
- Hiding, deleting, renaming as well as many more actions



You can create four types of documents using Google Docs.

Document: If you can use MS Word, you can use Google Docs which has many functional similarities. You can move text between the two programs.

Presentation: If you use PowerPoint, you'll find Google Presentation to be similar in function. Not only can you create your slides, but you can also publish those slides online as a slide show and share easily with your family, board, nonprofits or anyone that else you need to share information with.

Spreadsheet: Like Microsoft Excel spreadsheets, you can create budgets, mailing lists, set up calculations.

Form: You can easily create questionnaires with multiple types of questions (drop down menus, check boxes, text boxes and more). You can publish the questionnaire online, or email it to your family, grantees, or others, and see their responses all collated and graphed for you with no work necessary on your part!

PDFs: You can also view documents created in Adobe .pdf format. Any document you receive can be uploaded, or saved to Google Docs from your Gmail. It can be stored, shared, and viewed in Google Docs. Any attachment sent to you in an email to your gmail address doesn't even have to be downloaded, but can be saved directly to Google Docs. What a great way to organize effectively and reduce clutter.

How do multiple people work on one document?

Have you ever had this happen to you?

User 1 creates document and emails to User 2

User 2 edits that document and sends it to User 1 and User 3

User 1 edits document and sends it back to User 2 and User 3

User 3 edits document and sends it to User 1 and User 2

But, User 3 was working on his computer while User 1 was working on her document, so now there are multiple versions flying around and everyone is confused.

With Google Docs

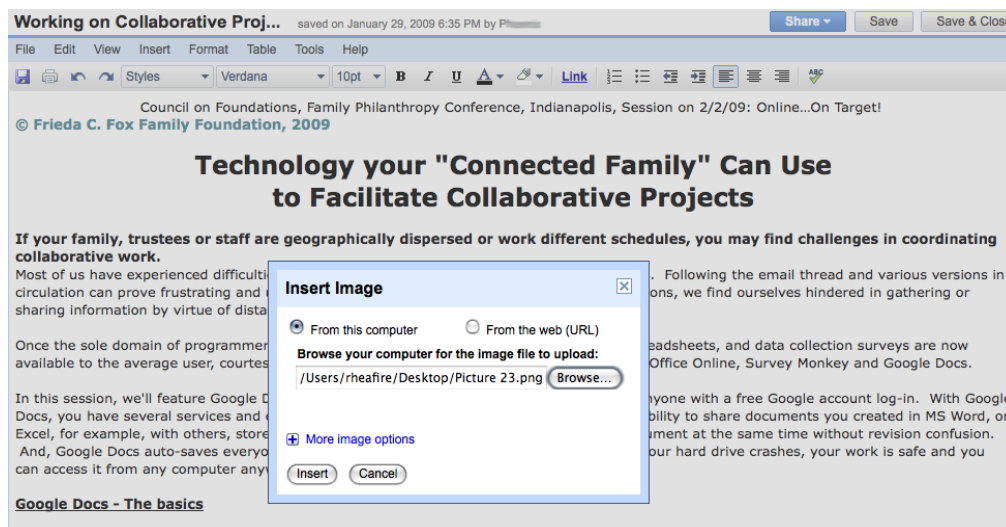
- Create your doc in either Google Docs, or MS Word, or other word processor. Save it as a Google Doc when you're ready to share.
- Invite others to collaborate. The system sends them an email, with your invitation and your specific text comment.
- Each user makes changes, and Google Docs keeps all changes saved to just ONE document.
- You can look back to see which collaborator made which edit, and when.
- Users can leave notes to others, within the document, as to their thoughts or revisions.
- All users can hold a telephone conference call and see the same document, at the same time, with real time revisions on everyone's screen!
- It doesn't matter where in the world or what computer anyone is on, as long as they have Internet access they can log in to gmail.
- And, you never lose a document, or forget where you saved it.

A Little About Each Type of Document

Google Documents

Google Documents is a program similar to Microsoft Word, but web based rather than computer based.

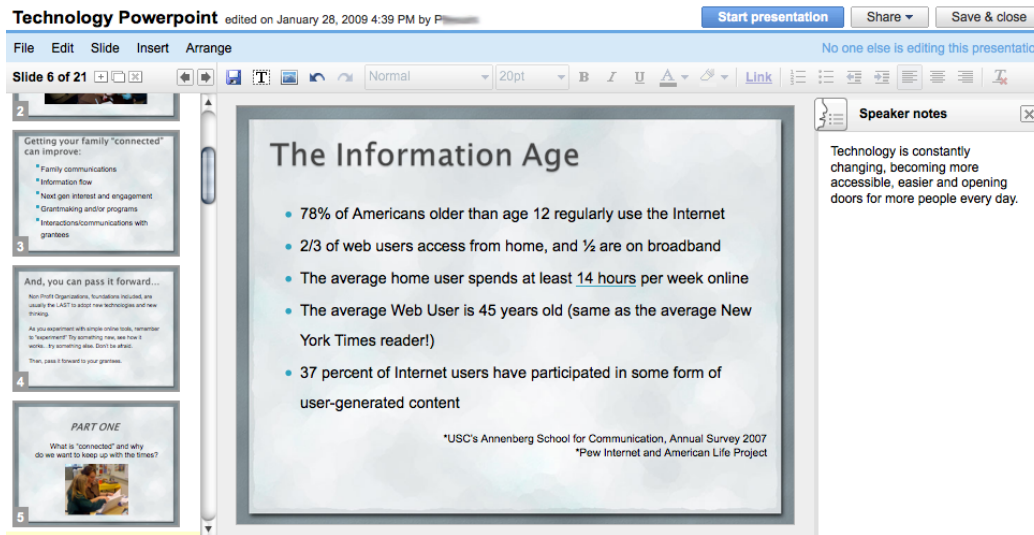
While Google Documents may not have all of the functionality of the Microsoft Word, but it does have many of the features you are used to, is laid out in a similar format, and is fairly easy to use. Below is a screenshot including a dialog box that allows you to insert images from your desktop, or from anywhere on the Internet.



Google Presentation

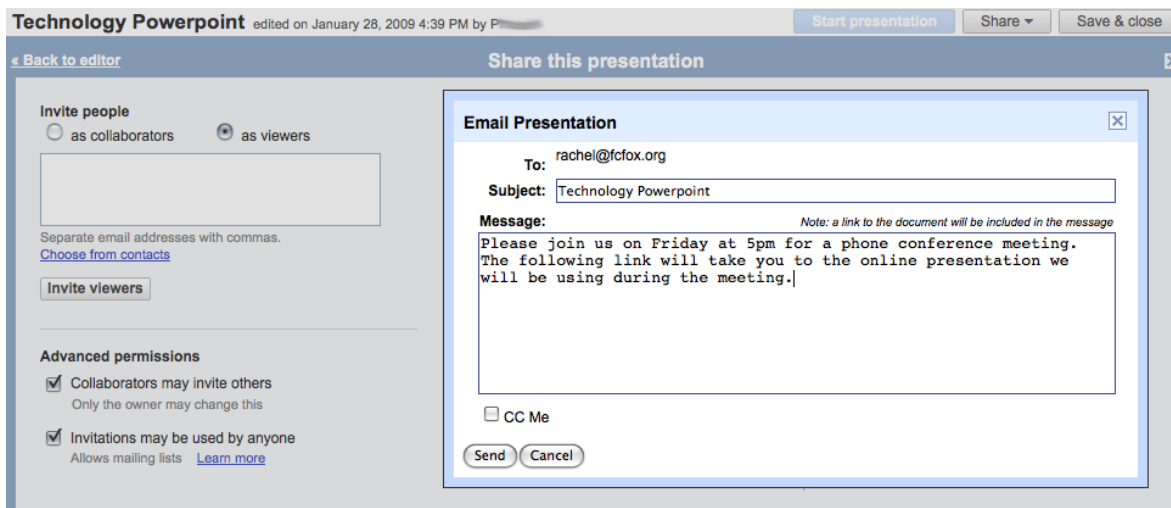
Much like Microsoft PowerPoint, Google Presentation can help you create a slide show or presentation. It can also help you publish those slides online so that you can share them with your family, board, nonprofits, etc. Need to have a meeting with board members in different cities or states? Setup your presentation online and then hold a phone or video conference where everyone can look at the same slides, no matter where they are.

Here's a screenshot of what that looks like, in Google Presentation:

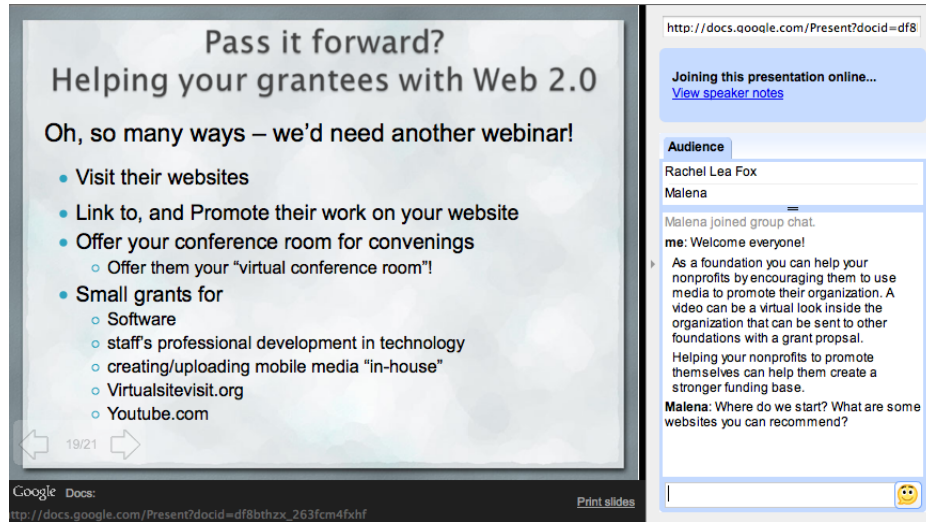


Similar to Google Documents, Google Presentation has a menu bar along the top that allows the user to format, organize, and display information in a variety of ways. You can view thumbnails of each slide along the left side. The selected slide appears in the middle and can be edited in this position. The "Speaker notes" is an option, at right, which allows the presenter to add his/her notes.

You can share your Google Presentation via email in advance of your board meeting or telephone call. Just choose "viewers" instead of "collaborators," like this:



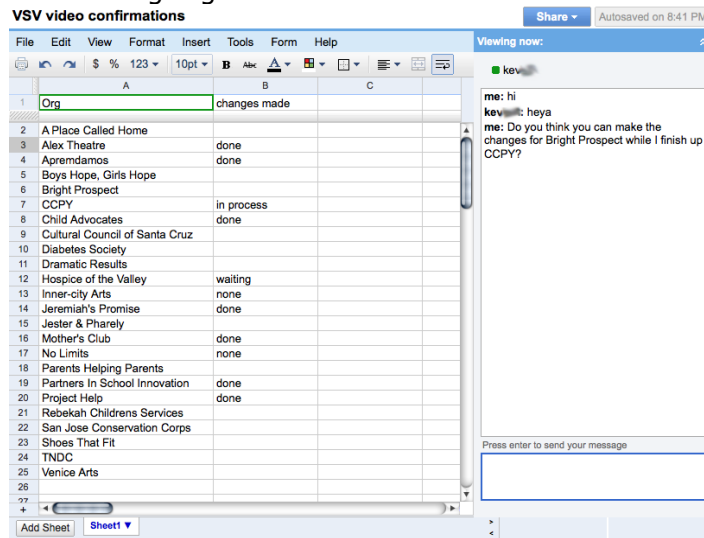
In your presentation, Google also offers an optional chat window built right in. Here's an example of what that looks like.



Viewers will need to have a gmail login to participate in the chat function. If they need a download to update their browser with the most recent plug-ins, Google will let them know when they enter, with a blue box beside the slideshow, and a link to the download for the free update. Or, if no chat or blue box directions appear, the viewer can just enter the presentation from Google Docs instead of through the email invitation.

Google Spreadsheet

Google spreadsheet is much like Microsoft Excel that is used to create budgets, mailing lists, grantee dockets, etc. A wonderful use is to share tasks, like in the screenshot below. You see a project, "VSV video confirmations" and an spreadsheet, along with a chat box at the right. Board members, trustees or staff can look at a list together, chat with each other about delegating items on the list, and make changes from either computer to the SAME document. No more email threads to follow. One spreadsheet, two (or more) people inputting, and discussing together in the box.



If you are working on a Spreadsheet with someone else, a box will appear that says "Viewing now:". You can click on the double arrow at the side of the box to make a chat window appear and initiate discussions with others who are also working on or viewing the same spreadsheet. If you'd rather not be distracted, just click on the little double arrow again and the chat window will disappear. You can review budgets, build mailing lists, discuss a grants docket, and make the changes needed as you discuss the data with others.

Google Forms (An Online Survey)

Google Forms can be used to survey grantees, trustees, family, or whomever you wish. You can either start a form from scratch, or from an existing spreadsheet you routinely use. For example, you may keep an excel spreadsheet of grantee names, addresses and staff. Perhaps you would like to send all grantees a quick survey form to update their staff list or whatever information you track. You can create a Google form that will take their responses and enter it straight into the spreadsheet.

To build a form, either choose the "new" option in the Google Docs interface and then select forms, or create a spreadsheet in Google Spreadsheet and then select the "forms" menu at the top of the spreadsheet. Once you have begun a form you can add, delete, or rearrange questions. You can create questions using several methods (shown below) and then publish your form to the web. Once you begin a form, do not make any further changes to the spreadsheet - simply work in the Form Edit view. Below are examples using all the possible styles of question available in Google Forms.

Google Forms Edit View

Technology Questionnaire

Please answer the following questions to help us create better sessions in the future.

Name

Technology Comfort
Please rate how comfortable you are with technology

1 2 3 4 5
Poor Great

Your Current Technology Use
Which of the following best describes you

- We use computers
- We have internet access
- We communicate using email (primarily)
- We communicate using email (occasionally)
- We have a website for our foundation
- We use websites to look up information on nonprofit and foundations.
- We use social media tools such as YouTube, Flickr, Vimeo, Video Conferencing, Blogs, Online Chat, etc
- We currently do not use any computer technology at all

Interest Area
Which topic would you want more training in?

- Working on Collaborative Projects (Google documents, online forms, etc)
- Online Presence - Having a visual presence on the web
- Conversations Over Long Distances
- None

Interest in Online Technology for Foundations/Nonprofits
After attending this session do you consider yourself more or less likely to attend a session on the same or a similar topic?

More Likely

Comments
Please leave any comments or suggestions you have for the session leaders.

You can view the published form here: <http://spreadsheets.google.com/viewform?key=pe7lm6GR80r2uVHkLFsY2IXQ>

Google Forms Online Public View

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Powered by Google Docs

At the bottom of your Edit View, in the dark bar across the bottom, there is a URL which is where the form will be found for the addressee to complete. If you have your own website and are able to edit it yourself you can also take advantage of the Embed feature. Under the "More Actions" tab, you can select the "embed" option that provides the code to copy into your site. Your survey can now be used as a function of your website. Or, you can use the email option that will allow you to email a link of your form directly from within the form.

You can see responses as they come in, either by looking at your spreadsheet, or by looking at the graphs for you automatically. Under the "See Responses" menu, select and then choose the "Summary" option. Below are examples of responses for this survey. All answers shown below are dummy answers inserted for demonstration purposes only.

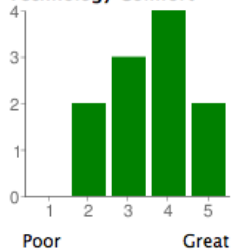
11 responses

Summary [See complete responses](#)

Name

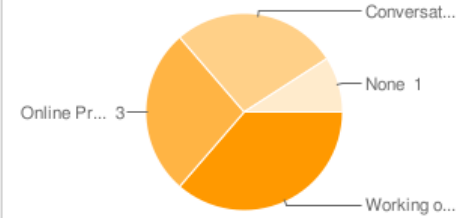
Rachel, Fox, Lyndsey, This Foundation, That Foundation, FCFox Foundation, Nym, Indiana, Milo, Thomas, Kevin

Technology Comfort

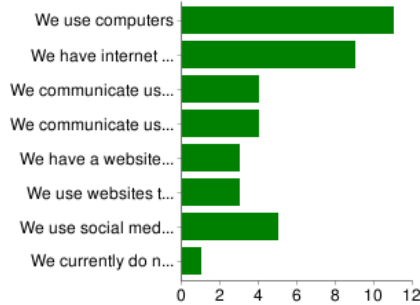


1 - Poor	0	0%
2	2	18%
3	3	27%
4	4	36%
5 - Great	2	18%

Favorite Topic

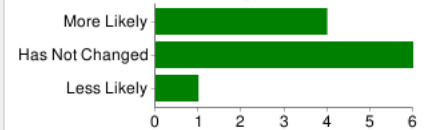


Your Current Technology Use



We use computers	11	100%
We have internet access	9	82%
We communicate using email (occasionally)	4	36%
We communicate using email (primarily)	4	36%
We have a website for our foundation	3	27%
We use websites to look up information on nonprofit and foundations.	3	27%
We use social media tools such as YouTube,	5	45%

Interest in Online Technology for Foundations/Nonprofit



Comments

totally cool, it was okay, thanks so much.

Google PDFs

PDF documents may not be edited in Google PDFs, however you can organize and store all of your PDFs using the Google Documents interface. Any pdf can be uploaded to Google Documents. Also, any PDF sent to you in your email can be automatically saved to your Google Documents without downloading to your computer. This can save time, hard drive space, and lots of clutter.

Resources & Links

Online Document Sharing

Google Documents

(free) Online documents including Word Documents, Spreadsheets, Presentations & Forms/Surveys.

Share documents online, work simultaneously with coworkers in your office or internationally. Track changes, work together, always have the latest version, A Google/Gmail Account is needed to use this service.

<http://docs.google.com>

ZoHo Writer

Provides online document services.

<http://writer.zoho.com/jsp/home.jsp?serviceurl=%2Findex.do>

Microsoft Office

Allows you to upload/download documents and share with coworkers.

<http://office.microsoft.com/en-us/FX102855291033.aspx>

Surveys

Google Forms Surveys

(free) Use your Google Documents to create online forms and poll your board, nonprofits, etc. You need to have a Google/Gmail Account to use this service.

<http://docs.google.com>

HowTo Create a New Form/Survey

<http://docs.google.com/support/bin/answer.py?answer=87809&topic=15166>

SurveyMonkey

Create online forms and poll your board, nonprofits, etc.

<http://www.surveymonkey.com/>