

Online Document Storage Process

Section 1 Introduction

These instructions will walk you step by step through the process of scanning documents and uploading them for storage on the internet in a Google Docs account. If you do not already have such an account, the instructions will assist you to create one. For this process, you will use an Apple Macintosh computer with an attached document scanner. Internet access will use Apple's Safari browser. The sections below combine written instructions with screenshot images of what you will see on the computer screen. You will be walked through the following steps in the noted sections:

- 1 Collect your documents at home and take them to the scanning center. **(Section 2)**
- 2 Set up the computer provided to you for your use. **(Section 3)**
- 3 Prepare a Google Docs account for storage of your documents - this will be your personal account. **(Section 5)**
- 4 Scan all your documents into your computer. **(Section 6)**
- 5 Print paper copies of the scanned documents (optional). **(Section 7)**
- 6 Upload the documents to your Google Docs storage. **(Section 8)**
- 7 Log out of the computer - you're through. **(Section 9)**

Conventions used in these instructions:

- 1 Field names on screen will be indicated by square brackets, e.g. [Name:]
- 2 Action buttons on screen will be indicated by curly brackets, e.g. {Log in}
- 3 Text you will see on screen is shown in double quotes, e.g. "Untitled"
- 4 Text you will type into a field is shown in single quotes, e.g. 'Guest'
- 5 Menu selections and submenu selections are separated by right angle brackets, e.g. File > Import image...

Section 2 Take your documents to be stored online to the scanning center

Documents you might want to take include birth certificates, drivers licenses, passports, marriage licenses, etc. - in other words, legal documents. This service is not for storing photo albums, scrapbooks, personal correspondence, genealogies, journals, etc.

Section 3 Prepare your computer at the scanning center for your use

3.1 Open the Guest account

You will use the Guest account so that you will find the computer unchanged by any prior users, and so that when you are through with it any changes you make will be removed in order that your privacy is protected and the computer is ready for the next user.

In the Login window, type 'Guest' in the [Name:] field, leave the [Password:] field blank, click {Log in}

3.2 Open the Safari browser

Click the {Safari} icon (a compass)



Section 4 Questions to tailor your next steps (in section 5)

4.1 Do you have a Google Docs account?

Only answer Yes if you remember how to log into it and can use it now

Yes - go to [5.3](#)

4.2 Do you have online access to your email?

Only answer Yes if you remember how to log into it and can use it now

Yes - go to [5.2](#)

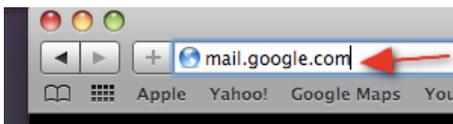
No - go to [5.1](#)

Section 5 Create a Google Docs account

5.1 Create a Google Mail account (if required - when you create a new Google Docs account you will need to confirm it by email if you're not using an existing Google account)

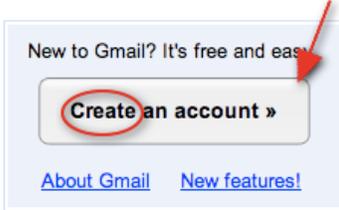
In browser, go to: mail.google.com

5.1.1 Enter the URL in the browser address bar



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5.1.2 {Sign in} to your existing Google account, if you have one, or {create} a new one



5.1.3 To create a Gmail account, fill in the fields in the Create form. Enter your actual first and last names. Your "Desired Login Name" will be fictitious - make something up. Click {check availability} to see that it is not already taken. Make up a "password" and write it down before entering it - it won't show up as you type it.

Create an Account

Your Google Account gives you access to Gmail and [other Google services](#). If you already have a Google Account, you can [sign in here](#).

Get started with Gmail

First name:

Last name:

Desired Login Name: @gmail.com
Examples: JSmith, John.Smith

If your desired name isn't available, try another

Choose a password: [Password strength:](#)
Minimum of 8 characters in length.

Re-enter password:

Stay signed in

Creating a Google Account will enable Web History. Web History is a feature that will provide you with a more personalized experience on Google that includes more relevant search results and recommendations. [Learn More](#)

Enable Web History.

Security Question:

If you forget your password we will ask for the answer to your security question. [Learn More](#)

Answer:

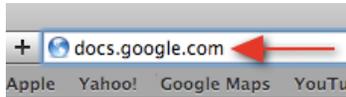
Secondary email:
This address is used to authenticate your account should you ever

5.2 Create a Google Docs account (if you don't already have one)

In browser, go to: docs.google.com

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5.2.1 Enter the URL in the browser address bar



5.2.2 {Sign in} to your existing Google account, if you have one, or {Get started} with a new one

5.2.3 To create a Google Docs account, fill in the fields in the Create form. Enter your actual first and last names. Your "Desired Login Name" will be fictitious - make something up. Click {check availability} to see that it is not already taken. Make up a "password" and write it down before entering it - it won't show up as you type it.

Create an Account

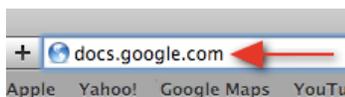
Your Google Account gives you access to Google Docs and [other Google services](#). If you already have a Account, you can [sign in here](#).

5.2.4 Confirm your Google Docs account creation if you are so instructed. This will entail logging into your email account and opening a confirmation request from Google. In it there will be a link to click for confirmation.

5.3 Open Google Docs

In browser, go to: docs.google.com

Enter the URL in the browser address bar



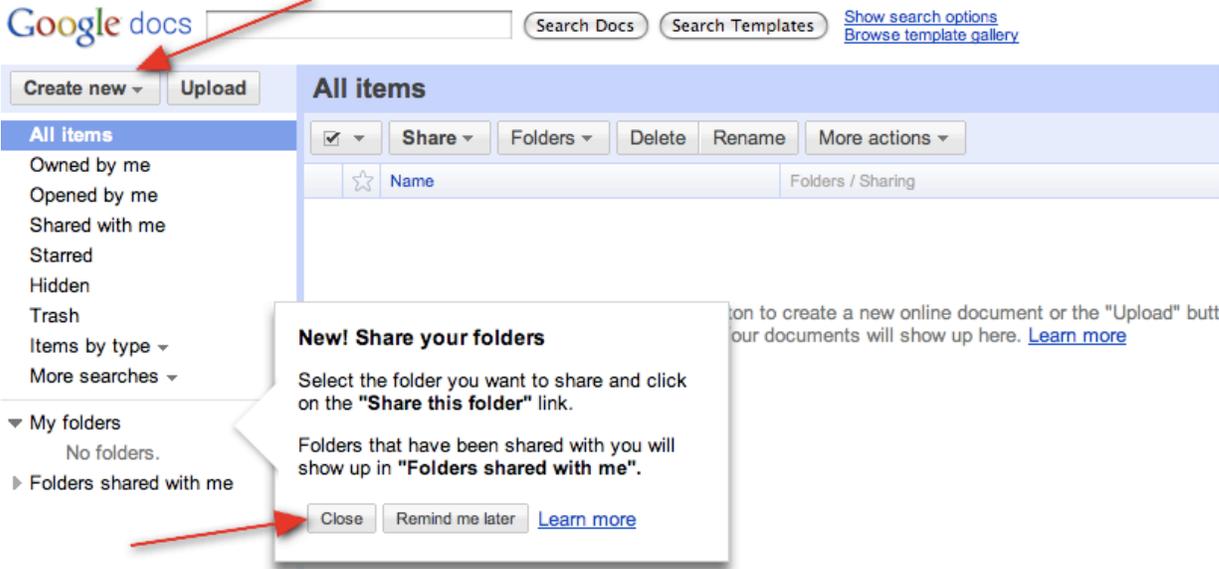
5.4 Create a new Folder for your documents, and name it whatever is meaningful for you.

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5.4.1 In the opening screen, close the "New! Share your folders" box by clicking {Close}. Then click {Create new}.

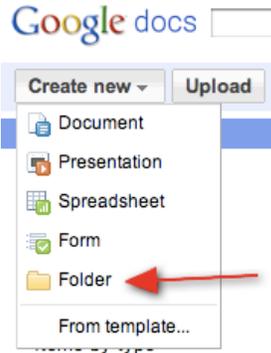
[Gmail](#) [Calendar](#) [Documents](#) [Reader](#) [Web](#) [more](#) ▼

docstoreonline@gmail.com | [New! Share a folder](#) |

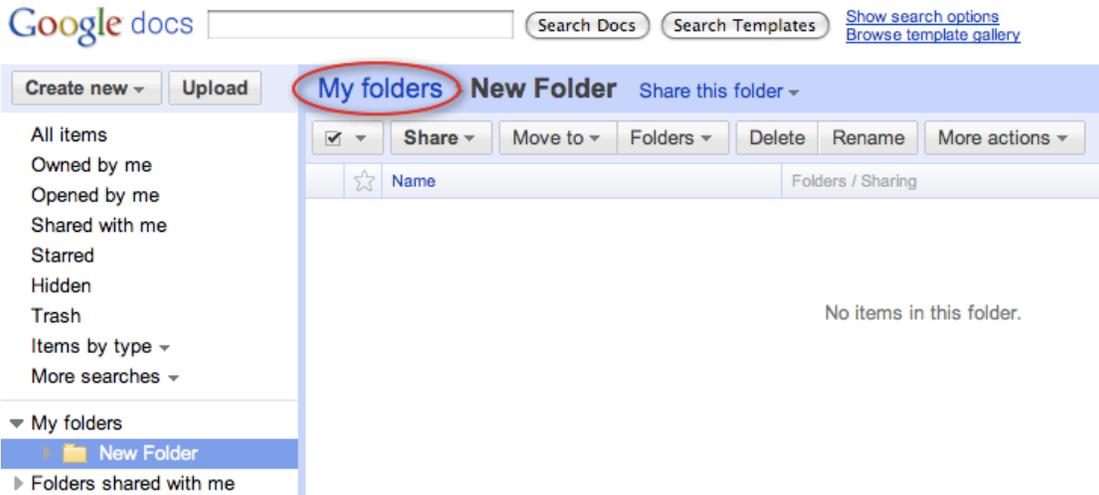


on to create a new online document or the "Upload" butt our documents will show up here. [Learn more](#)

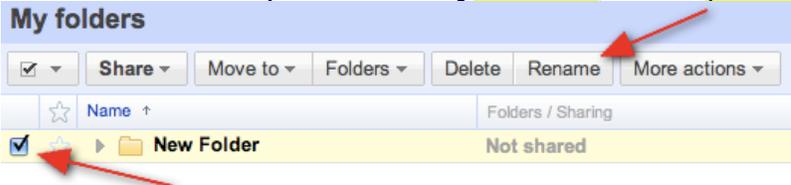
5.4.2 From the drop-down list that appears, click {Folder}



5.4.3 In the blue bar, click "My folders"

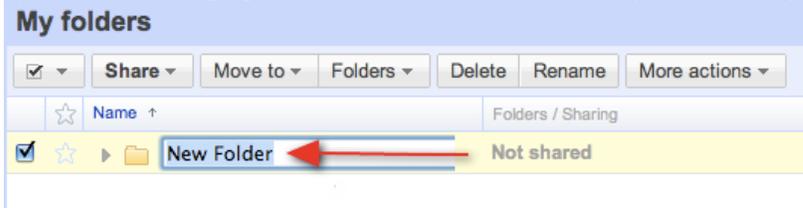


5.4.4 Click in the checkbox in the yellow bar containing "New Folder", then click {Rename}

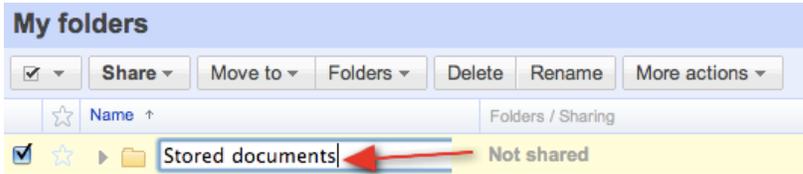


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5.4.5 Type over the blue-highlighted entry, "New Folder" with the name you want to call your documents folder, e.g. 'Stored documents'



5.4.6 The result should look like this



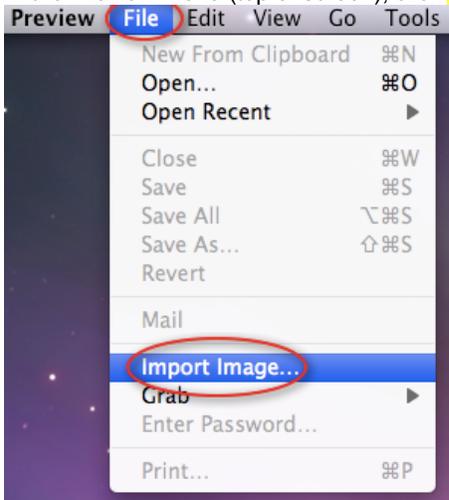
Section 6 Scan your documents into PDF files

6.1 Open the Macintosh program named Preview

Click the {Preview} icon (a couple photos and a magnifying glass)



6.2 In the Preview menu (top of screen), click File > Import image... . The scanner should scan a preview image.

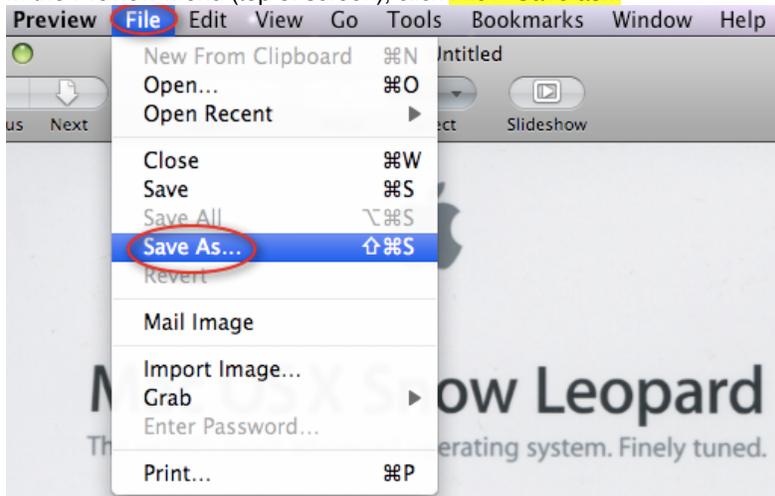


6.3 With the mouse, drag a box around the portion of the scanner preview image to be scanned, and click {Scan} (note - this may differ with different scanners - if you can't figure out what to do, ask the instructor for help).

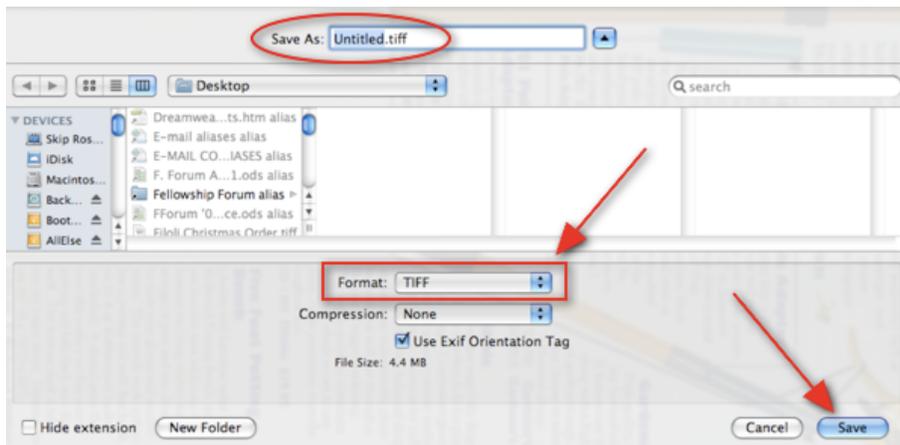


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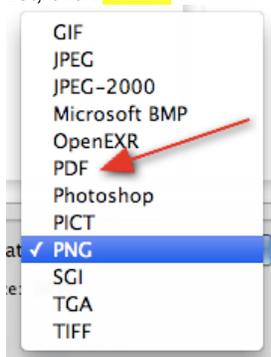
6.4 In the Preview menu (top of screen), click **File > Save as...**



6.5 Type over "Untitled" in the [Save As:] box (see red ellipse in figure) with the name you choose for the document, e.g. 'Birth certificate - John Doe'



6.6 Click the spinner at the right of the [Format:] box (see red arrow and red rectangle in figure above) and, from the drop down list, click "PDF"



6.7 Click {Save}. The scanned image file will go to your desktop.

6.8 Repeat the above steps until all documents have been scanned

Section 7 Print the PDF files for paper copies to take home (if you want them)

7.1 Double click a file icon on the Desktop

7.2 In the Preview menu (top of screen), click **File > Print...**

7.3 Inspect the preview image to be sure it is as you want it printed. If not, adjust print parameters to get it the way you want it

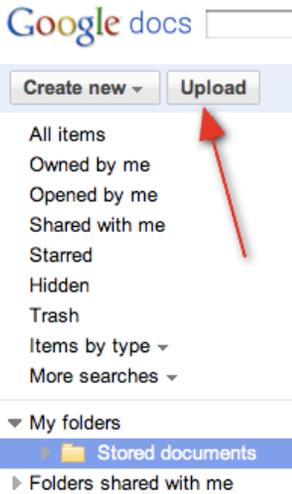
7.4 Click {Print}

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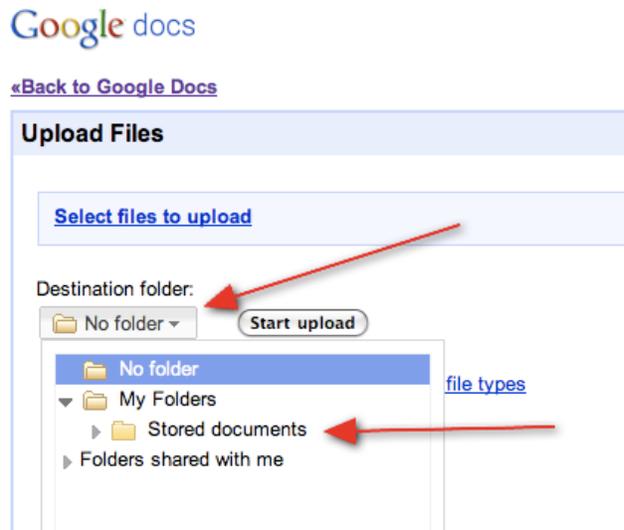
7.5 Repeat the above steps until all documents have been printed.

Section 8 Upload the PDF files into the Google Docs folder

8.1 Return in Safari to your Google Docs page - it should still be open in the browser. If not, open it at "docs.google.com". Click **{Upload}**



8.2 Select your documents "**Destination**" folder by clicking **{No folder}** and then your folder name, e.g. "**Stored documents**" from the drop-down list



8.3 Choose the document(s) to upload by clicking "**Select files to upload**". A Finder window will appear. Click **{Desktop}** in the left sidebar, and then click on the name of one of the documents to be uploaded. Now hold down the **{Command}** key on the keyboard (it's to the left of the spacebar and has a picture of an apple on it) while you click the names of all other documents

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to be uploaded. When all documents are selected, click **{Start upload}**

[Gmail](#) [Calendar](#) [Documents](#) [Reader](#) [Web](#) [more](#) ▼

Google docs

«Back to Google Docs

Upload Files

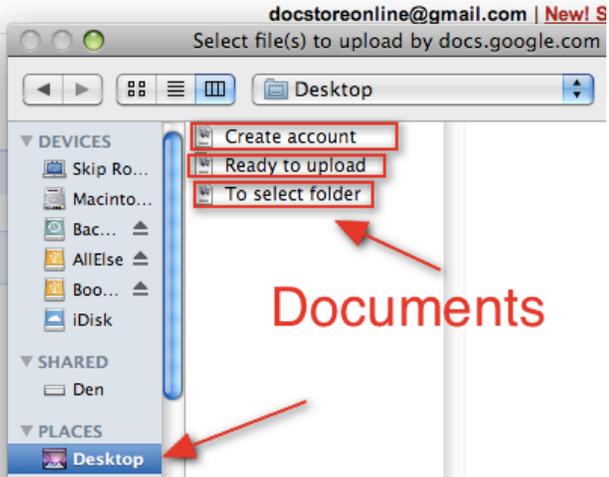
Select files to upload

Destination folder:

Stored documents ▼

Start upload

[+ Show conversion limitations and supported file types](#)



Documents

8.4 When uploading is complete, you will see the documents listed. Check the list to be sure you got them all. If not, repeat the previous step to get the one(s) missed. When you're finished, click **"Back to Google Docs"**

Google docs

«Back to Google Docs

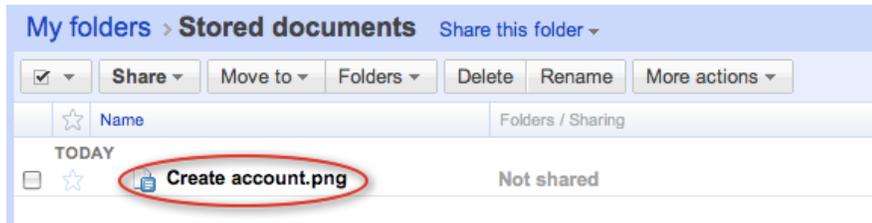
Upload Files

✓ Create account.png 61.6 K

61.6 K

Upload complete. [Upload more files](#)

8.5 Again you should see a list of the uploaded documents. You can double click the name of one or more to view them and be sure they uploaded properly.



Section 9 Log out of Guest account

Logging out will permanently delete any files, folders and settings you made here. This protects your privacy.

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Click the Apple icon at the top left corner of the screen;



Click [Log out Guest Account...]; in the popup window, click

{Log Out} You're through - congratulations.

