# LIBRARY SYSTEM

Empowering libraries. Empowering communities.

**Tech Tune-Up: Gmail** 

# Agenda

Today, you'll learn how to

- Security
- Manage your Gmail account displays
- Manage your Inbox with labels and filters
- Use templates to send emails
- Set up auto-replies



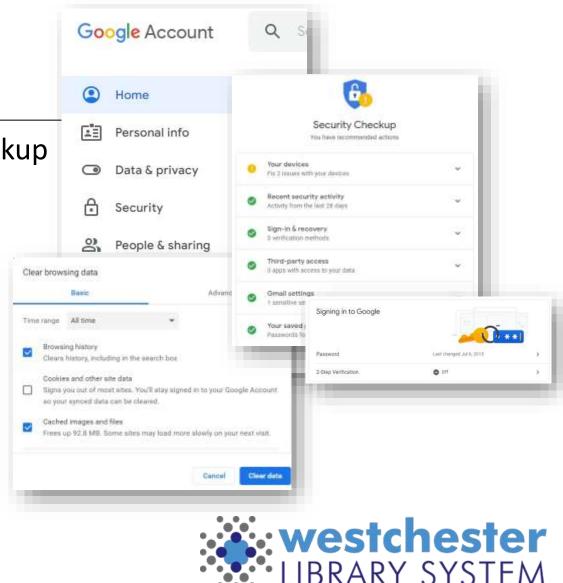
# **Essential Security**

Manage your Google account > Security Checkup

- Devices and Recent activity
- Sign-in & Recovery
- Sign into Google Chrome to
  - see your setup
  - use multi-factor authentication

Google Chrome stores lots of browsing information. To keep it running well, clear your browsing data regularly.

- Get started in the 3-dot menu at More Tools > Clear Browsing Data
- Set a monthly task or reminder on Google Calendar to cut down the clutter!

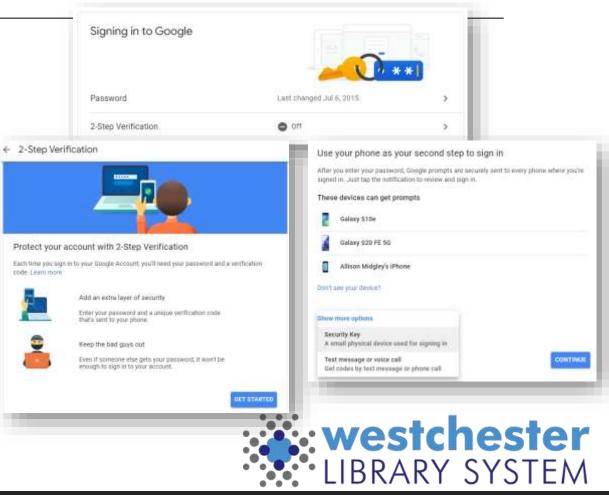


## Secure Multifactor Authentication

#### Sign into Google and

- Turn on 2-Step Verification (Multifactor Authentication or MFA)
- Use your phone, another email, or an add-on like <u>Authy.com</u>, <u>Google</u> <u>Authenticator</u>

The Simple Reason Why Google Thinks Everyone Should Use 2-Step Verification



# Make More Display Space

Collapse the folder pane at any time to make more space to read contents. Mouse over an icon to open a menu

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Open the side panel to see integrations like Calendar, Tasks, Phishing Alert Button



### **Inbox Display Options**

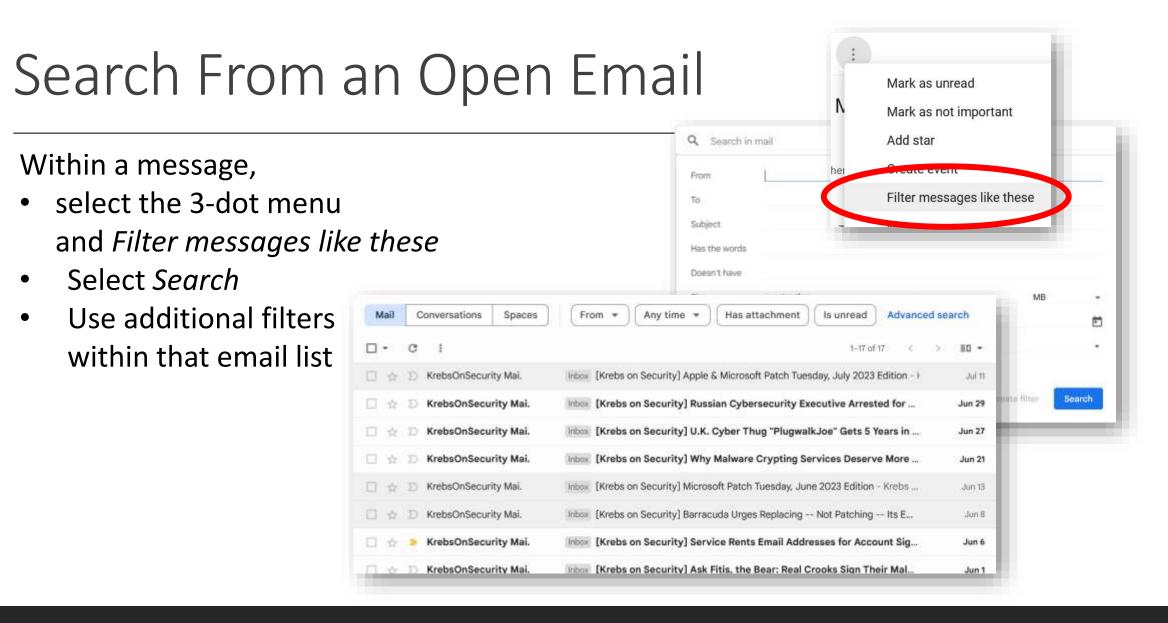
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	_	O Belov	v inbox				Westcheste

### Basic Search

Search in mail				荘	
Has attachment	t 7 days Fro	om me			
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Terry Kirchner tkirchner@wlsmail.org	From				
Angela Groth agroth@wlsmail.org	То				
Wilson Arana warana@wtsmail.org	Subject Has the words				
	Doesn't have				
	Size	greater than		MB	
	Date within	1 day	*		Ē
	Search	All Mail			
	Has attac	chment			
				Create filter 5	earch

#### Quick search or search by

- Sender
- Receiver
- Subject
- Exclude words
- Size
- Date
- Folder
- Attachments



# Categorizing, Filtering, and Sorting

Automatically label by sender, project-related messages, or customized category

- Labels
- Stars
- Inbox Type

Tips for filtering & sorting emails

Q Search in mail	O Customize
	O Important first
Labels	Ourread first
Presets: 1 star 4 stars all stars	O Starred first
In use: 🔶 🛧 🗹 🚺 🛧 🗓 💌	O Priority Inbox
Not in use: 🔺 🌟 🌟 👖 👔	O Customize

Quick settings

NDOY TYPE

See all settings

## Labels

#### Step 1: Create a label

- 1. On the left, scroll down, then click **More**.
- 2. Click Create new label.
- 3. Name your label.
- 4. Click **Create**.

#### Step 2: Create a filter that automatically labels emails

- 1. In the search box at the top, click the Down arrow.
- 2. Enter terms to match specific messages. For example, to filter and label emails from an account, in the **From:** field, enter the email address.
- 3. At the bottom of the search window, click **Create filter**.
- 4. Scroll to Apply the label: and choose a label.
- 5. Click Create filter.

You can also create labels from individual or selected emails.

New label

state guidance Nest label under

Please enter a new label name:

Please select a parent.

+

3

3

Annual Report 2022

Futures?

Digitizing

Gadget ideas

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Please select a parent..

Down instances IT Help

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Labels

Annual Report

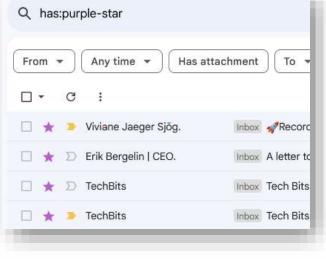
2022

Futures?



#### Stars

In Settings > General, choose an icon for a purpose. Mouse over the icon to see its name. Then search for matching emails with *is starred*: or *has:yellow-star* (No spaces)  $\bigcirc$  has:purple-star



blue-star green-check red-bang blue-info orange-guillemet



#### Importance Markers



Click to teach Westchester Library System Mail this conversation is important.

- Selecting and deselecting markers will train Gmail to know what's important to you
- The category can be hidden from your folders if you don't use it



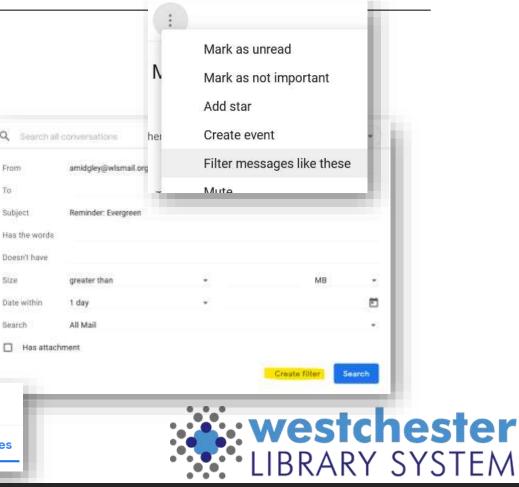
# Managing your Inbox with Filters

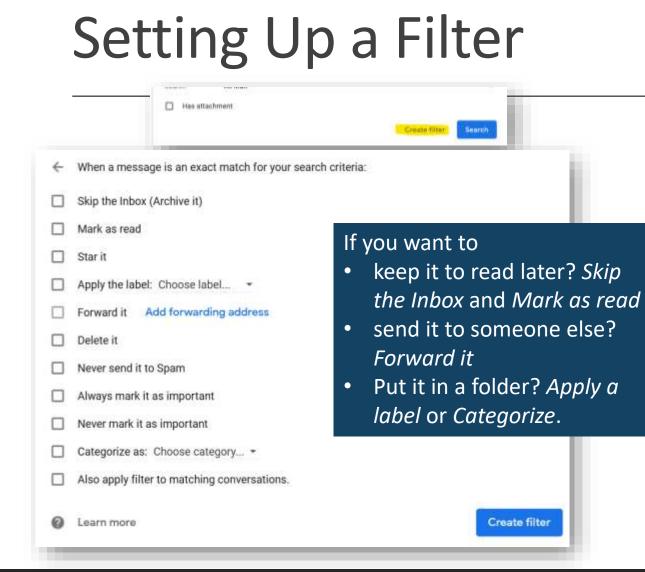
Filters allow you to bring more important email to your attention. There are 3 ways to set them up

- Within a message, select the 3-dot menu and *Filter messages like these*
- From a search (include sender, subject, age, etc.)
- In Settings > Filters and Blocked Addresses, scroll down to *Create a new*

filter

Setting	S				t		
General	Labels	Inbox	Accounts	Filters and Blocked Addresses	l		





All methods lead you to the Search form.

- Select Create filter.
- Choose one or more actions that you'd like the filter to perform on all matching messages as you receive them.
- Click Create filter.

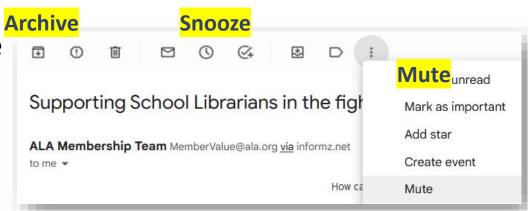


# Snooze, Archive, and Mute

You can clean up your inbox without deleting emails, using snooze, archive or mute. them. Your emails are moved to a label called "All Mail."

Snooze: temporarily remove it from your inbox until you need it. The email will come back to the top of your inbox when you want it.
Archive: The message will come back to your inbox when someone replies to it.
Mute: Any replies stay out of your inbox. You can search for the conversation if you want to find it again.

Archive and Mute Details





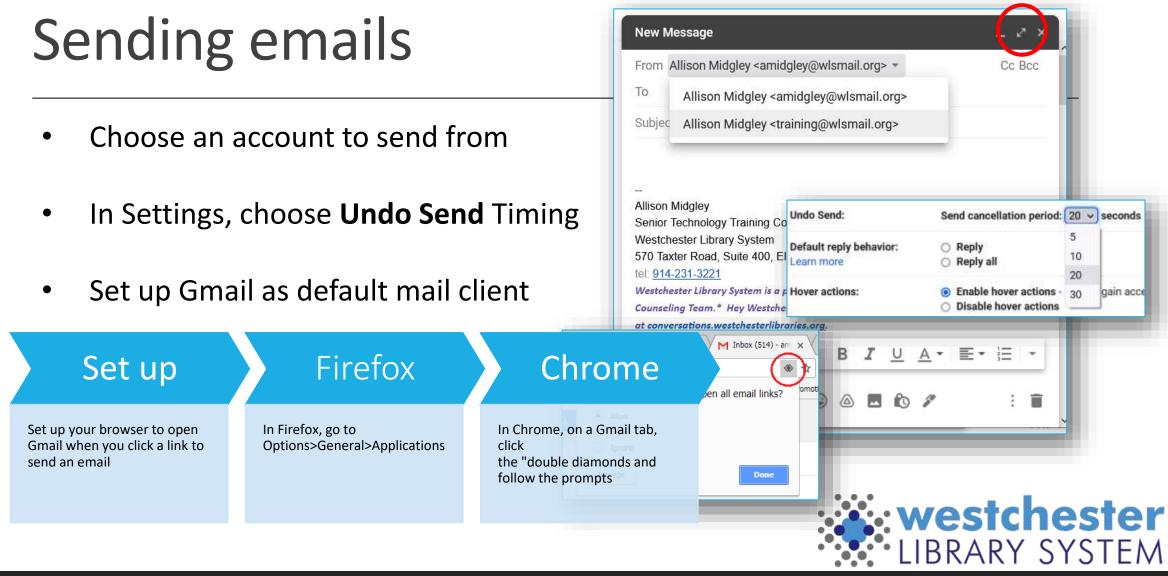
# Set Up Multiple Signatures

Your signature tells people who you are

- Set up different new message and reply to signatures
- Use different signatures for different audiences, for example, for internal library information and for patrons

Main Signature 🖍	Allison Midgley Senior Technology Training Coordinator Westchester Library System 570 Taxter Road, Suite 400, Elmsford, NY 10523 tel: <u>914-231-3221</u>
	Sans Serif • • • • • • • • • • • • • • • • • • •
+ Create new	
Signature defaults	
EMAIL ADDRESS	
amidgley@wlsmail.org	✓
amidgley@wlsmail.org	
training@wlsmail.org	
training@wlsmail.org	 





## Set Up A Vacation Responder

In settings > General,

- 1. Turn on the vacation responder
- 2. Choose dates to start and stop
- 3. Enter a subject
- Enter a message it's a good idea to include alternate contact information

 Vacation responder:

 Vacation responder off
 (sends an automated reply to incoming messages. If a contact sends you several messages, this automated reply will be sent at most once every 4 days)
 Learn more
 Vacation responder off
 Vacation responder off
 Vacation responder off
 Vacation responder on
 Vacation responder on

○ Vacation	responder on	
First day:	October 6, 2022	✓ Last day: October 12, 2022
Subject:	Away October 6 - 12, 2	022
Message:	Rich formatting »	
	have an urgent ques	e office and will return on October 13, 2022. If you tion, please contact the WLS help desk at g or call 914-674-3616.
	All the best, Allison	
	acation respo	nder to tell neonle that you

You can use a vacation responder to tell people that your email has changed – set it up to run for 1 or more months, and include your new address in the message.



5. Save

# Using templates

- In *Settings > Advanced,* enable Templates
- To create a template
   In the Compose window, write an email.
   Before sending, use the 3-dot menu to choose
   Templates > Save Draft as template, and enter a name.
- To use a template,

open a *Compose* window, in the 3-dot menu, choose *Templates > your Named Template*. The message text will load so that you can customize it and then send.

Try other Settings > Advanced options like Auto-Advance to show the next conversation instead of your inbox after you delete, archive or mute a conversation. See what works for you!

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# Set up an "I've Got a New Email" message

- 1. Log into your *old* email account.
- 2. Create a template called New Email Address.
- 3. Set up an auto-reply filter
  - 1. In the *To* field, enter your **old** email address, i.e. jsmith@wlsmail.org,
  - 2. Click Create filter
  - 3. Check the box for *Send template*
  - 4. Choose template > New Email Address
  - 5. Click Create Filter

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New Email Address



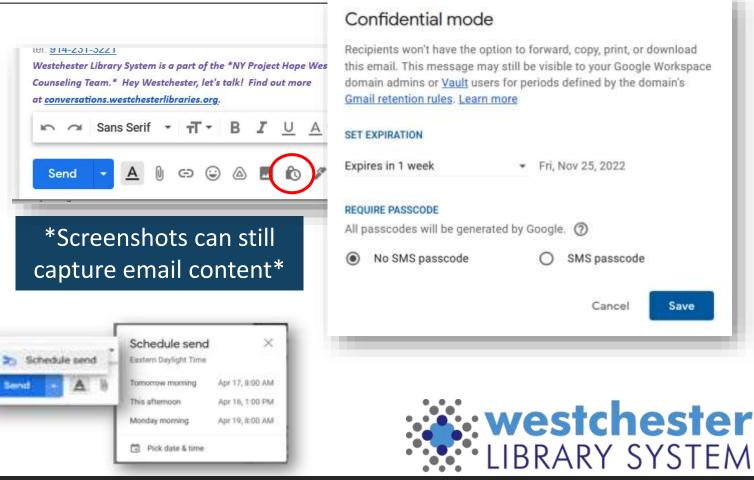


# **Confidential Mode and Scheduling**

#### **Confidential Mode**

- Send mail only to the person intended
- Protect from download, print, forward
- Set an expiration date to limit email access

Schedule send suggested or custom chosen time



Save

# Using Aliases As Filters

With Aliases - add categories after your username

- For example, messages sent to the following aliases will all go to janedoe@gmail.com:
- janedoe+school@gmail.com
- janedoe+notes@gmail.com
- Aliases can be used to register for newsletters and websites so they're easy to organize later



# Setting Up Aliases

Step 1: Choose aliases

- Think of how you want to sort your email, then choose an alias for each category. For example:
- Use <a href="mailto:yourname+work@gmail.com">yourname+work@gmail.com</a> for work emails.
- Use <u>yourname+news@gmail.com</u> to sign up for newsletters.
- Use <u>yourname+shopping@gmail.com</u> to create an account with an online retailer.

Step 2: Filter your messages

- <u>Create filters</u> to take automatic actions, like:
- Adding a label or a star
- Forwarding to another account
- Archiving or deleting

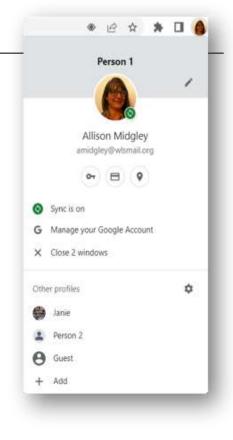


# Multiple accounts

Have multiple Google accounts? Switch between them quickly using Chrome Browser profiles.

- In the <u>Chrome Browser</u>, in the top-right corner next to the address bar, click your profile image.
- Click Manage People.
- Click Add Person.
- Enter a name, choose an image, and click Add.
- Sign in with the Google Account you're adding. All settings and bookmarks automatically sync.

**Note:** Not sure which account you're currently using? Click your name and see which profile is at the top.





# Gmail Links & Support

- <u>Integrated Gmail</u> (mail, chat, meet, etc) <u>Tips for filtering & sorting emails</u>
- Gmail Helps on the IT WIKI

- Allison Midgley
- <u>Training@wlsmail.org</u>
- <u>Support@wlsmail.org</u>

