LIBRARY SYSTEM

Empowering libraries. Empowering communities.

Tech Tune-Up: Gmail

Agenda

Today, you'll learn how to

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



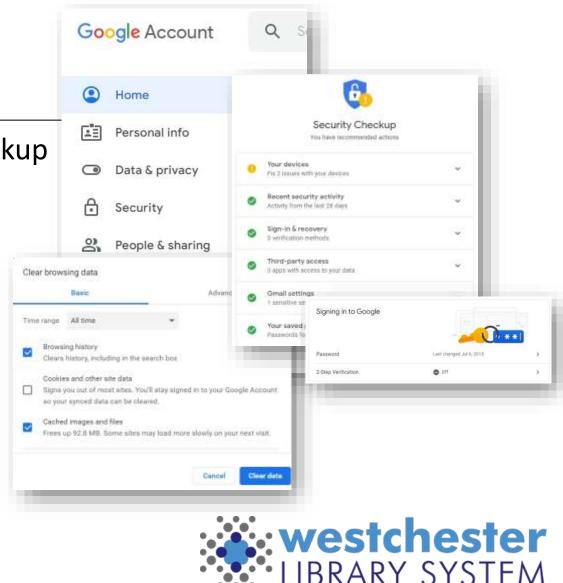
Essential Security

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!

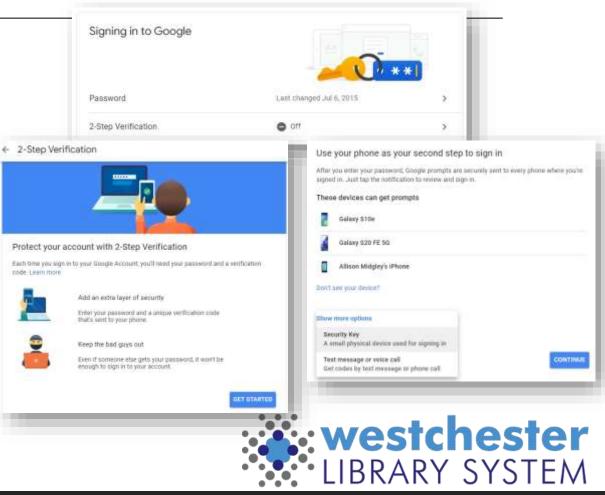


Secure Multifactor Authentication

Sign into Google and

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

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

≡	M	Gmail	- 1	=	M Gmail	≡	M	Gmail	
Mail	0	Compose	- 1	Mail	□• œ i	Mail	0	Compose	
		inbox	571		~ Unread			Inbox	1,048
Chat	\$	Starred		Chat	📋 👷 🍺 WLS HelpDesk	Chat	\$	Starred	
8	0	Snoozed		:8:	🔲 👷 🔉 Augusta August	:8:	0	Snoozed	



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



Inbox Display Options

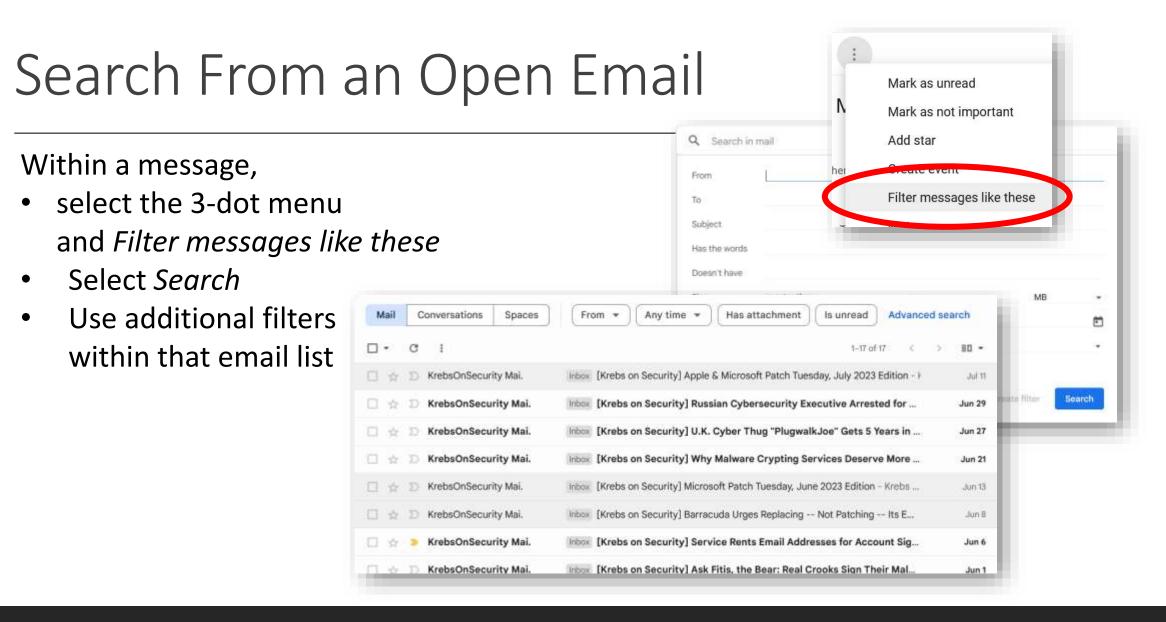
lick settings	× P	rimary	🟷 Pror	notions	왕, Social	🖳 Forum:		
See all settings		rinnar y		notions			5	
OX TYPE								
Default Customize		In Qui	ck Settin	gs		٠	Set t	he Reading
Important first	D	• Se	t Inbox T	ype: Unread	d first,		Pane	e: Toggle on/off
Unread first		Sta	rred firs	t, Priority, e	tc			·
Starred first	*	READING PAN	E	🗐 🕁 🍃 Angela Kilsdonk	Equinox meeting this Friday? - Good after	meon, Thope 🗊 🗃	Toggle split	
Priority Inbox		🔿 No spli	t	🗌 🛊 D Library 2.0	SJSU ISchool Events - "CA School Lib Incident #8264 Payment History for th		6-52 PM	Equinox meeting this Friday
Customize -	-			 Augusta Augusta Augusta Augusta Mary 1 	WLT mining mistake on question 9.24 MLT mining Annual Report Questions		5:17 PM	Angefa Kilsdonk 6.07 PM (0 minut to Linchay, Douglas, Wilson, Altaon, me, Galen = Good afternoon, Linope everyone is doing well! Pm checking to r
Customize	-	Right o	finbox	Bublic Library Ase	Contraction of the second s		5 74 PM	meet this Enday of 11 am? Please let me know model like to buch have about the week
		O Below	nbox				X V	vestchest
								IBRARY SYST

Quick and Full Search

as attachment	t 7 days Fro	om me		
Allison Pryor apryor@wlamail.org	Q. Search i	n mail	_	
Terry Kirchner tkirchner@wlsmail.org	From			
Angela Groth agroth@wlsmail.org	То			
Wilson Arana warana@wtsmail.org	Subject			
_	Has the words			
	Size	greater than	MB	ā
	Date within	1 day		Ē
	Search	All Mail		
	Has atta	chment		
			Create filter	iearch

Quick search Full search is often most effective. Search by

- Sender
- Receiver
- Subject
- Include words
- 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

	O Important first
Labels	 Unread first
Presets: 1 star 4 stars all stars	O Starred first — ☆
n use: 🔶 🛧 🗹 💶 🛨 🖬 💌	O Priority Inbox
lot in use: 🌟 ★ ★ 💶 👔	O Customize

Quick settings

INBOX 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

ILS - Evergreen

Migration

innovation make Library Visits

Please select a parent..

Down instances IT Help

ACO

Innovation Lab

Labels

Annual Report

2022

Futures?



Stars

Presets: 1 star 4 stars all stars In *Settings > General*, choose an icon for a purpose. In use: Not in use: Mouse over the icon to see its name. Then search for matching emails with is starred: or has: yellow-star (No spaces) blue-star Q has:purple-star green-check red-bang From Any time 👻 Has attachment То

Inbox MRecord Viviane Jaeger Sjög. D Erik Bergelin | CEO. Inbox A letter to D TechBits Inbox Tech Bits TechBits Inbox Tech Bits

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



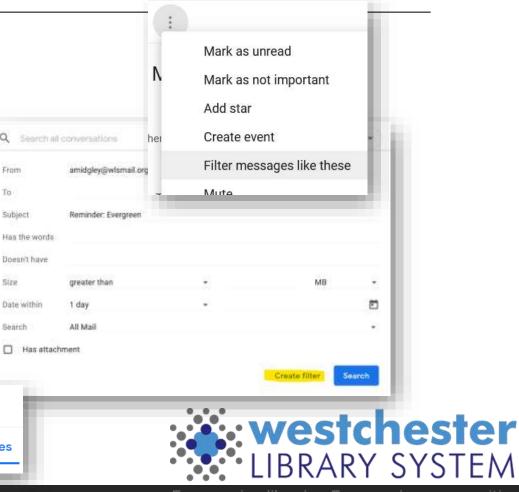
Managing your Inbox with Filters

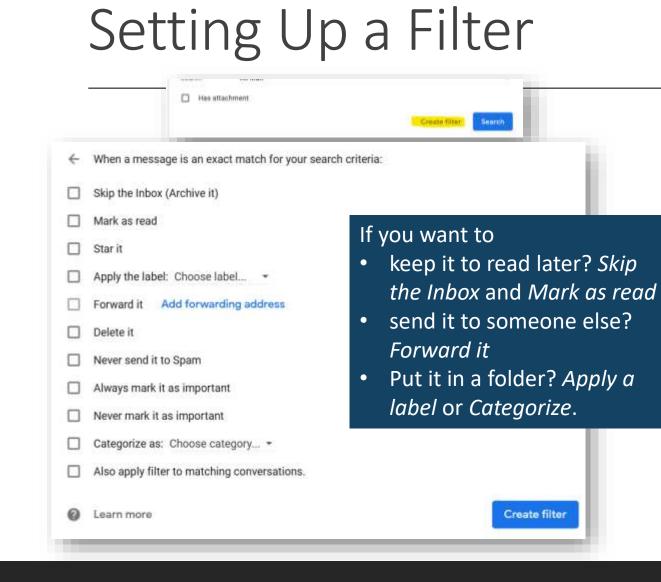
Filters allow you to bring more important email to your attention. There are 3 ways to set them up

- 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			





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.



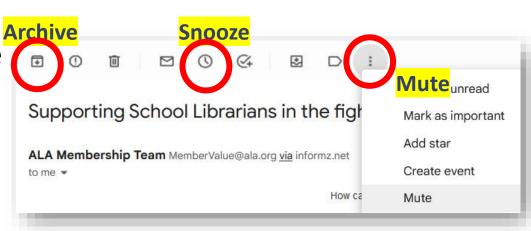
Snooze, Archive, and Mute

You can clean up your inbox without deleting emails using snooze, archive or mute. 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.







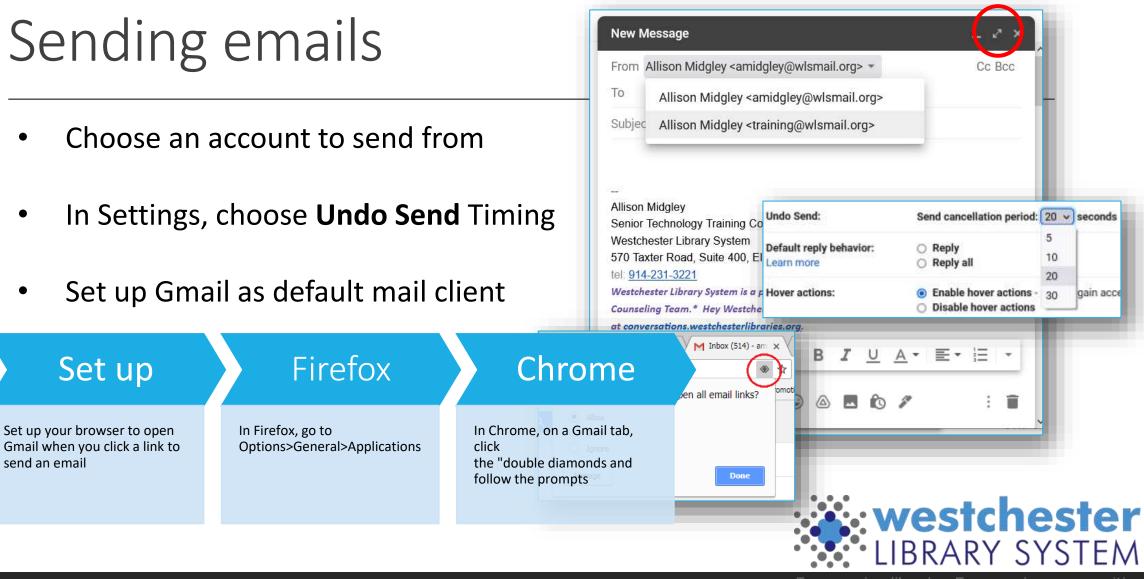
Set Up Multiple Signatures

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 🖍 📋 Training	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						





Set Up A Vacation Responder Securely

In Settings > General,

- Turn on the vacation responder
- Choose dates to start and stop
- 3. Enter a subject
- Enter a message it's a good idea 4. to include **general** alternate contact information
- 5. Save

Vacation responders can present security risks, especially for users in administration. Include as little information as possible to prevent scammers from sending phishing emails that look like they come from you. The Dangers of OOO Messages

Vacation responder:	-	responder off			
(sends an automated reply t incoming messages. If a	•• Vacation	responder on			
contact sends you several messages, this automated	First day:	October 6, 2022]	✓ Last day: Octo	ober 12, 2022
reply will be sent at most	Subject:	Away October 6 - 12,	2022		
once every 4 days) Learn more	Message:	Rich formatting »			
		Hello, I am out of th have an urgent que support@wlsmail.o	stion, please conta	ct the WLS help d	
		All the best, Allison			
You can us	se a vac	ation respor	nder to tel	l people t	that

your email has changed – set it up to run for 1 or more months and include your new address in the message.



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!

		s can be created and inserted through the omatic replies using templates and filters		00
	_	Reminder: Session in Zoom		
jes into templates to save compose toolbar. You can				
		Reminder: Session in Zoom		
75 - 25		Hello,		
 vrtcuts ustomize your keyboard st 	ortcuts via a new settin			
			Default to full screen	
OVERWRITE TEMPLATE	INSE	Alison Midolev	Templates	
Reminder: Session	in Zoom	Reminder: Session in Zoom	Label	
Reminder: Session	in Teams	Reminder: Session in Teams	Plain text mode	
Save as new templa	ate 🕁	Save draft as template +	Print	
r.		Delete template	Check spelling	
	saw		Smart Compose feedba	ack
		Send - 🛕 🕴 🖾 🕼	6867	

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

l	late		Cybersecurity Awareness D		
	il Addr	ess	i, Emme	Save as new template	
	Send template:	Choose	template		
	Always mark it a	Reminde	r		
	Never mark it as	New Ema	ail Address		
	Categorize as: (Cyberse	curity Awar	eness Dire	



X New Email Address Recipients noon Supporting School Librarians in the New Email Address Join us April 25 for Empowering Co uinox Announces Accessible Vu As of April 21st, my email address is amidgley@wherevermail.org ious About Al's Impact on Educ update your contacts list aming DRAFT -- The Digital D Thanksl Allison With all these BOGO deals, your Apps for Earth Day [Friday Ne Allison Midaim Default to full screen Senior Technology Tra .S Help OVERWRITE TEMPLATE Templates INSERT TEMPLATE genie. Reminder Label Reminder New Email Address Plain text mode New Email Address Cybersecurity Awareness Dir... Print Check spelling [4] Save draft as template

Confidential Mode and Scheduling

Confidential mode Schedule send Choose a Recipients won't have the option to forward, copy, print, or download 101. 914-201-0221 Westchester Library System is a part of the *NY Project Hope Wes suggested or custom this email. This message may still be visible to your Google Workspace Counseling Team.* Hey Westchester, let's talk! Find out more domain admins or Vault users for periods defined by the domain's Gmail retention rules. Learn more at conversations.westchesterlibraries.org. chosen time 🗠 冲 Sans Serif 🝷 🕂 🕶 🖪 SET EXPIRATION **Confidential Mode** Expires in 1 week Fri, Nov 25, 2022 Ð Send Send mail only to the REQUIRE PASSCODE All passcodes will be generated by Google. (?) *Screenshots can still person intended No SMS passcode SMS passcode capture email content* Protect from download, Cancel Save print, forward Schedule send × • Set an expiration date Schedule send Eastern Daylight Time Apr 17, 8:00 AM Tomorrow morning to limit email access This afternoon Apr 16, 1:00 PM

Monday morning

Pick date & time

Apr 19, 8:00 AM



Using Aliases As Filters

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 yourname+work@gmail.com 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



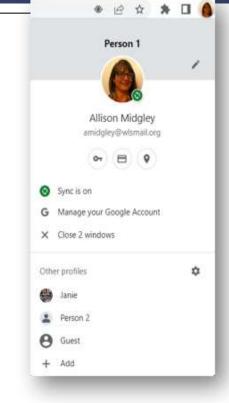
Multiple accounts

Integrating work and personal email accounts is **not** recommended. It puts all your accounts at higher security risk and can make your personal email and devices subject to search or seizure in police investigations.

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>

