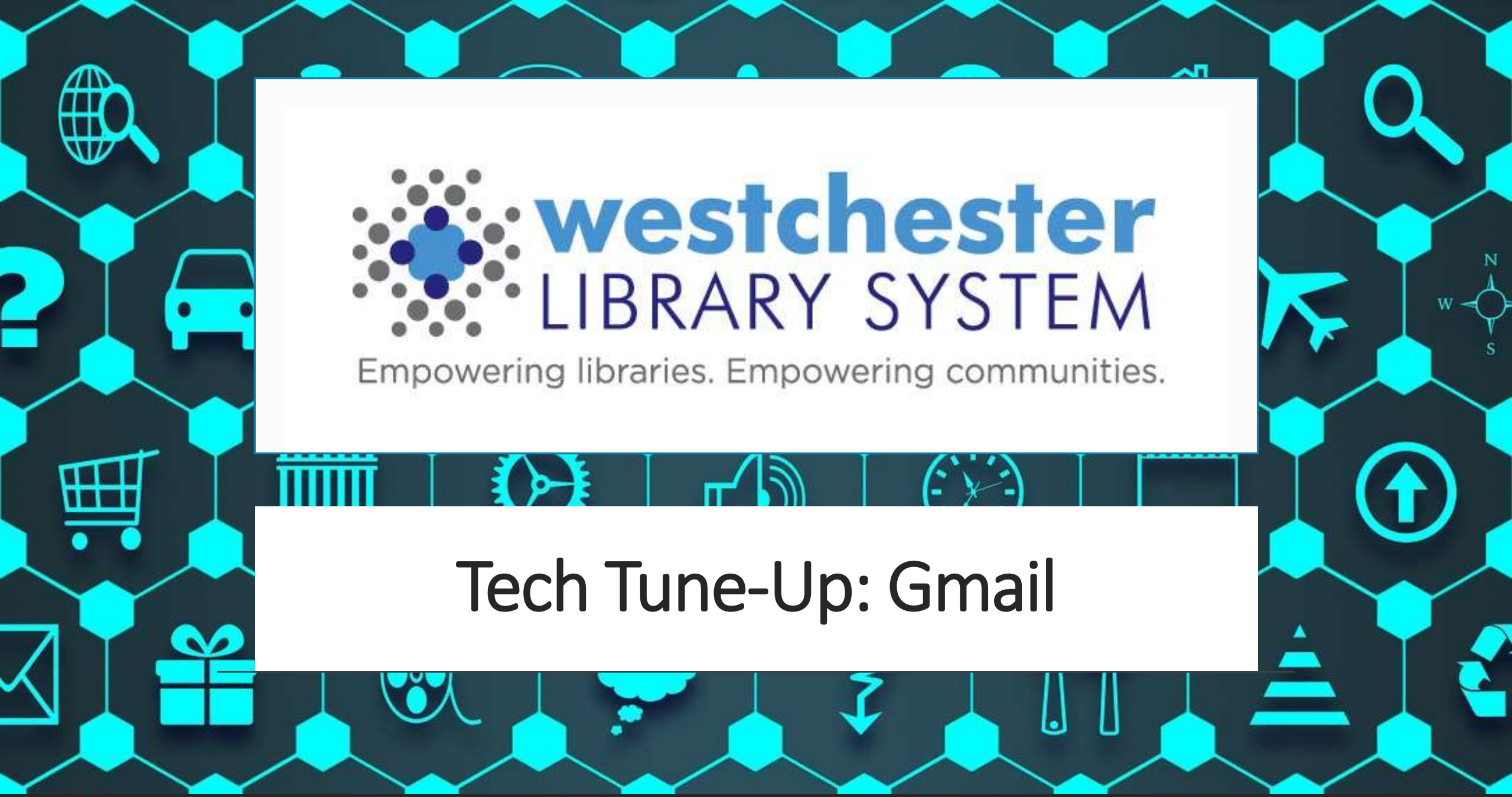


Tech Tune-Up: Gmail

Agenda

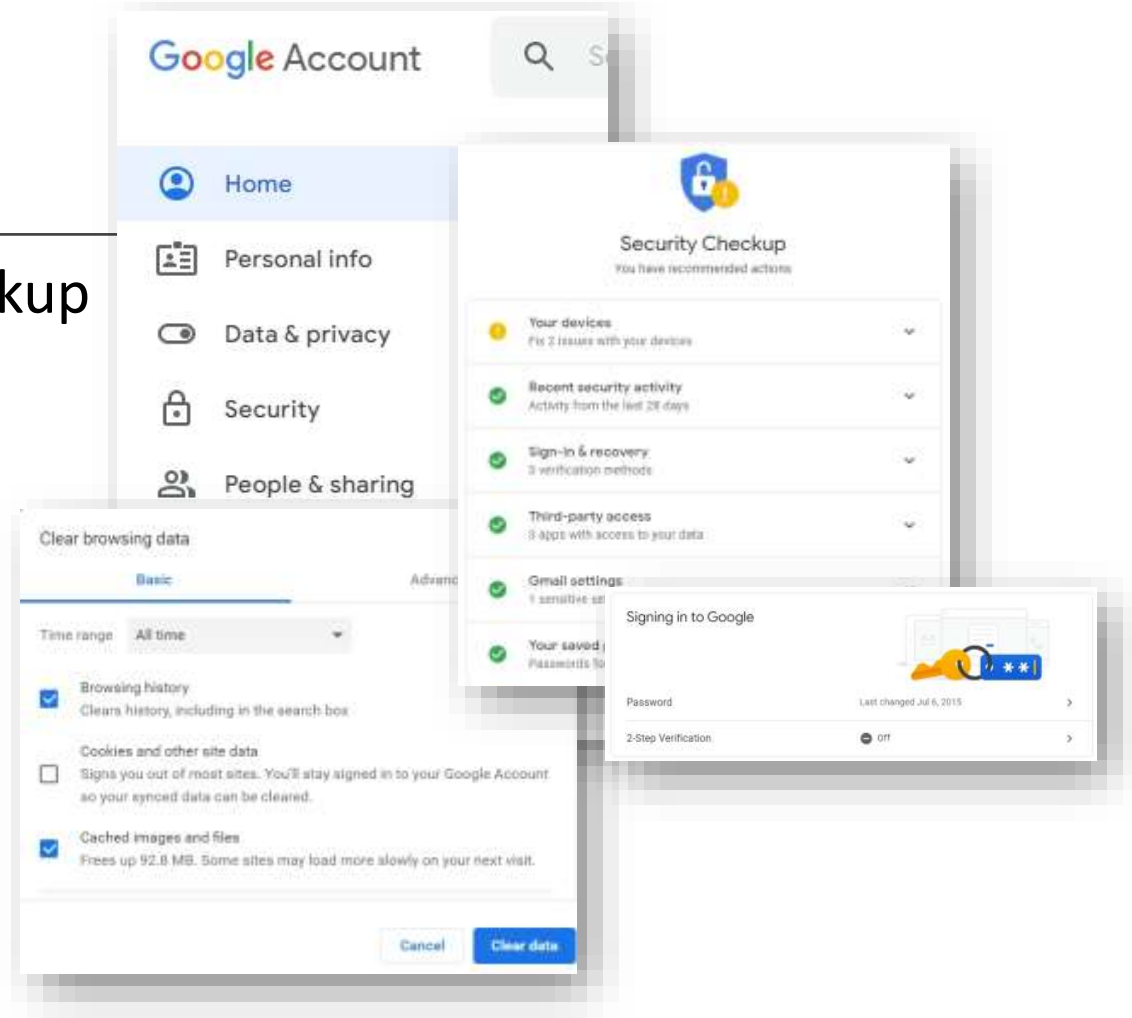
Today, you'll learn how to

- 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!

westchester LIBRARY SYSTEM

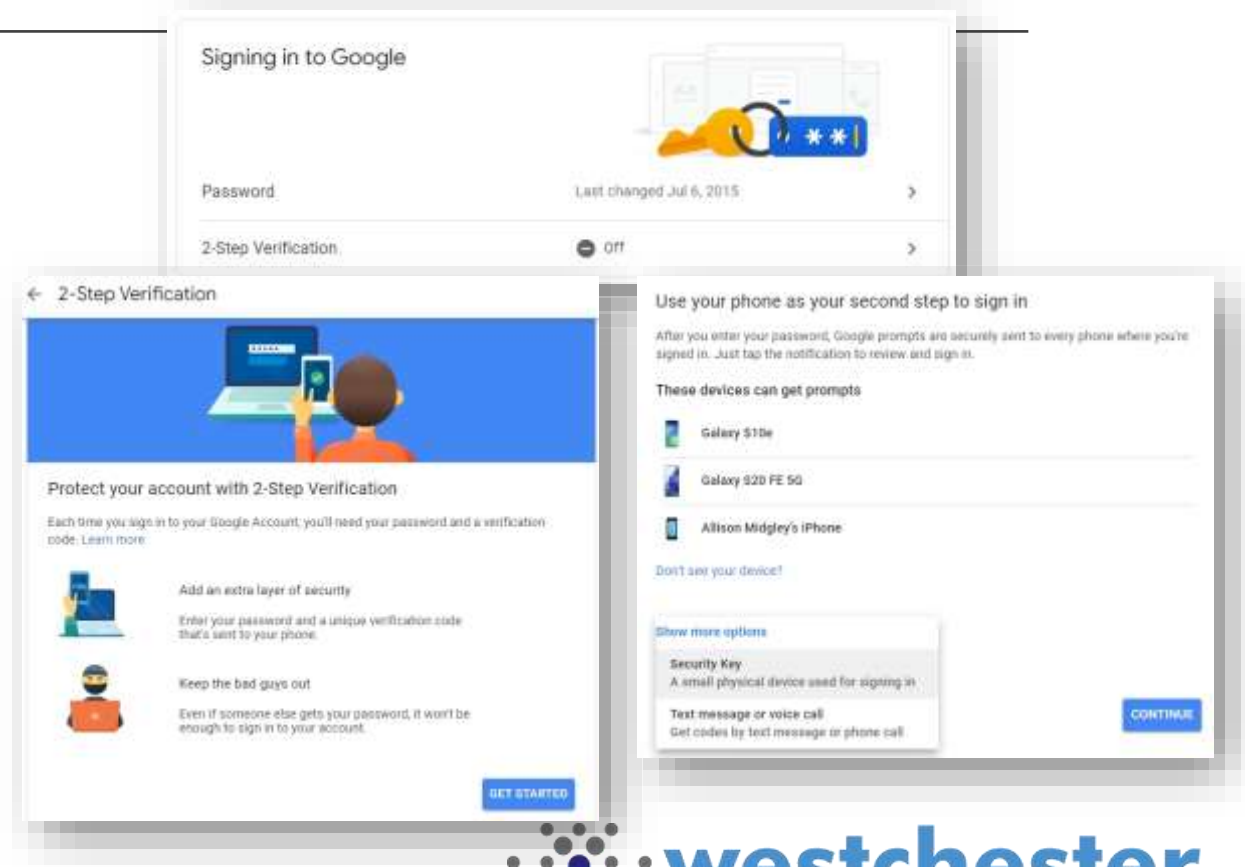
Empowering libraries. Empowering communities.

Secure Multifactor Authentication

Sign into Google and

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

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

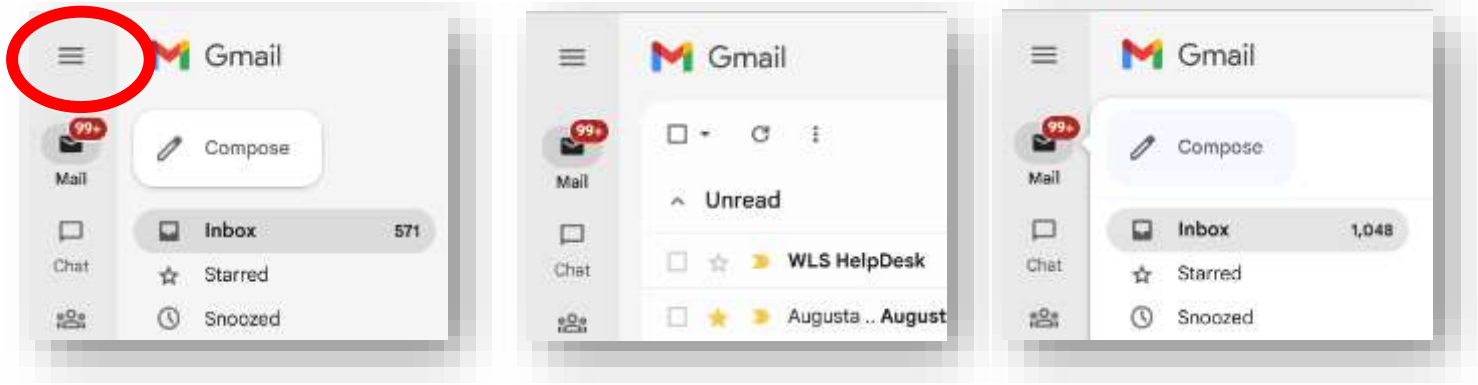


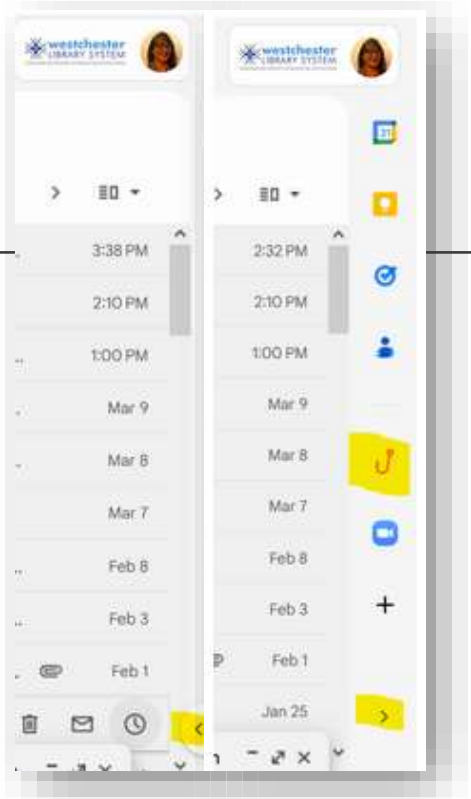
westchester LIBRARY SYSTEM

Empowering libraries. Empowering communities.

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

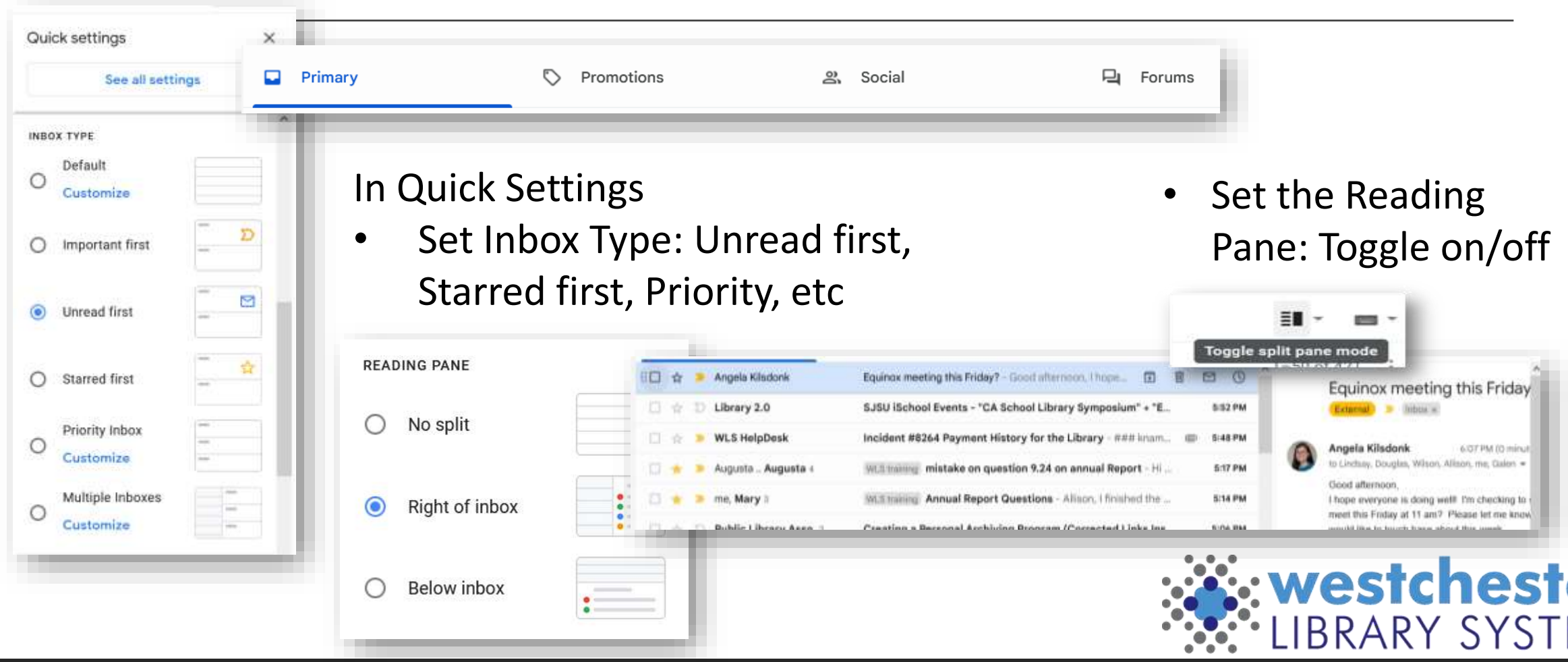




Open the side panel to see integrations like Calendar, Tasks, Phishing Alert Button

westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

Inbox Display Options



In Quick Settings

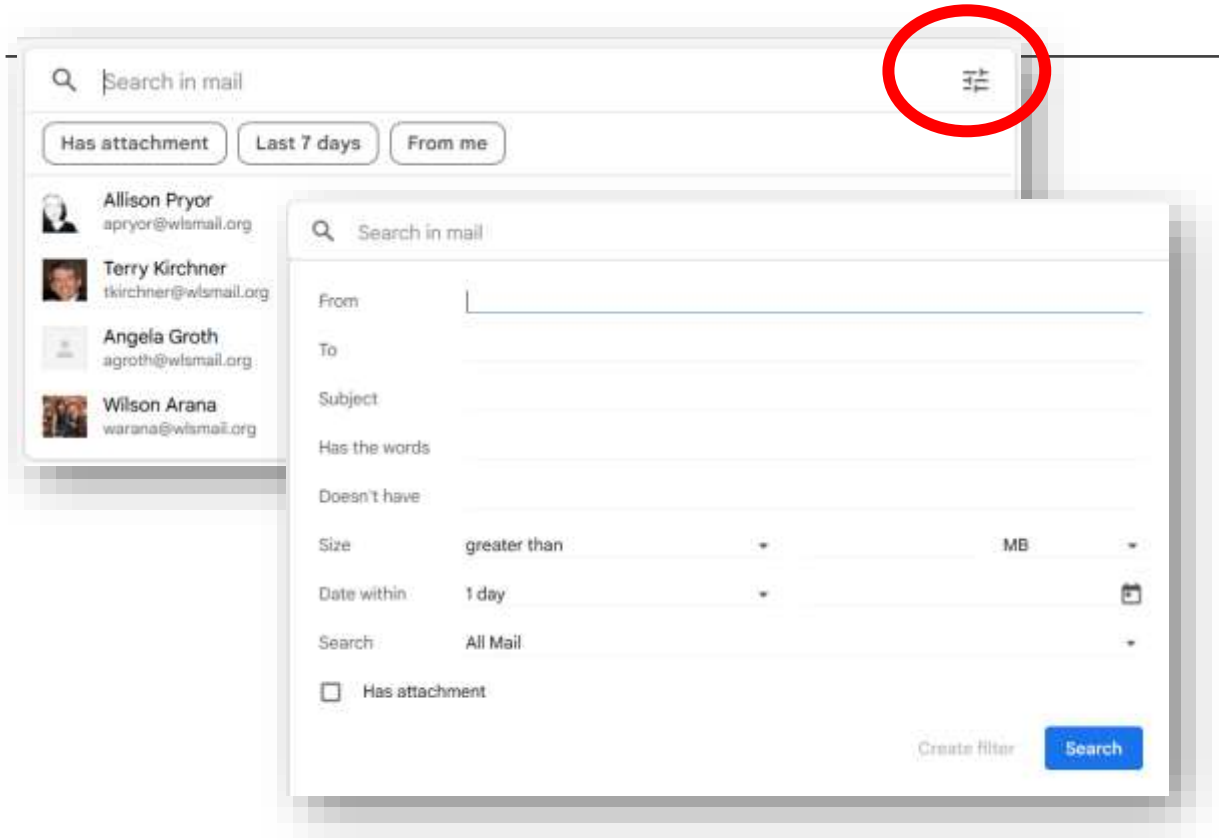
- Set Inbox Type: Unread first, Starred first, Priority, etc

- Set the Reading Pane: Toggle on/off

westchester LIBRARY SYSTEM

Empowering libraries. Empowering communities.

Quick and Full Search



Quick search

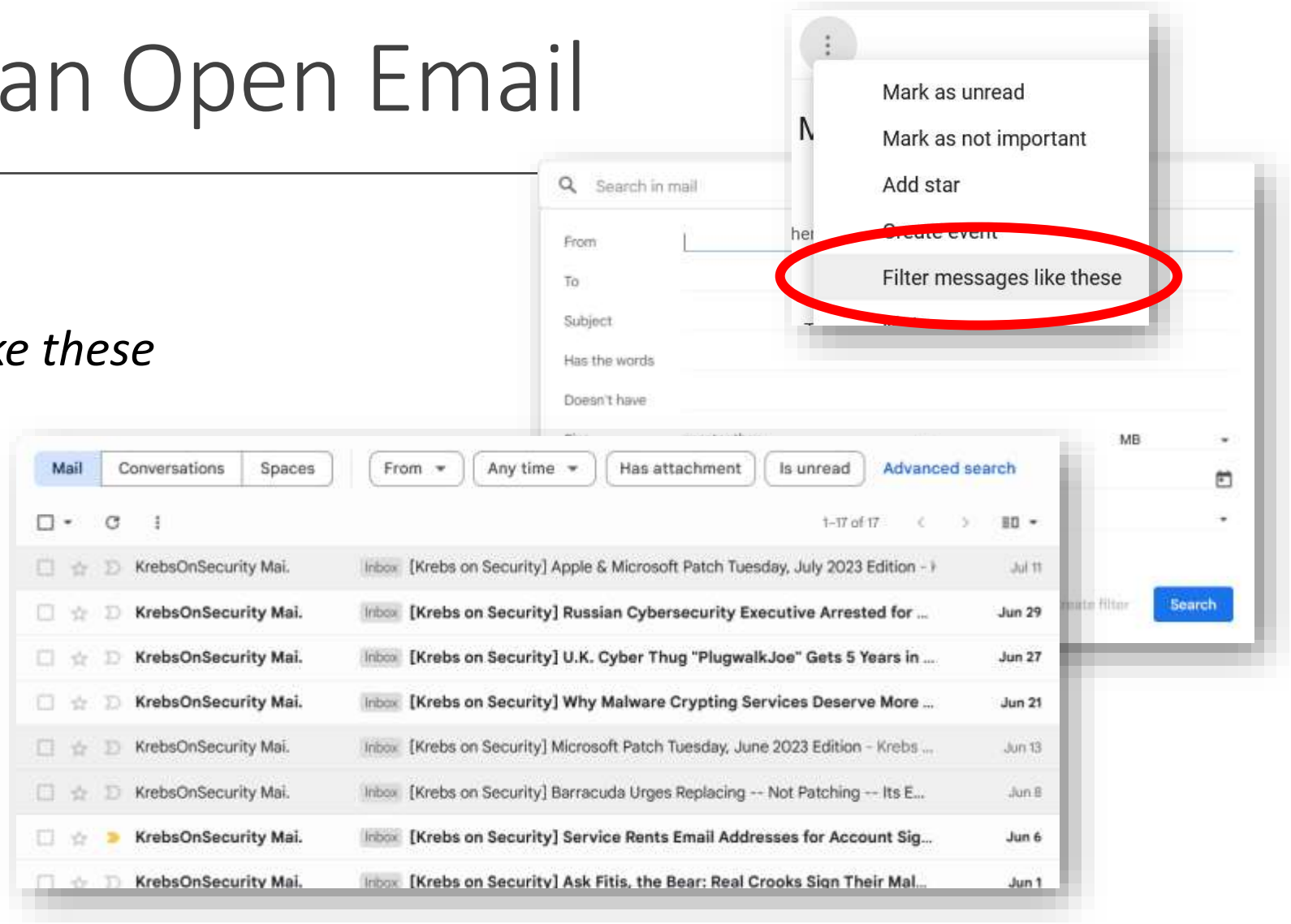
Full search is often most effective. Search by

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

Search From an Open Email

Within a message,

- select the 3-dot menu and *Filter messages like these*
- Select *Search*
- Use additional filters within that email list

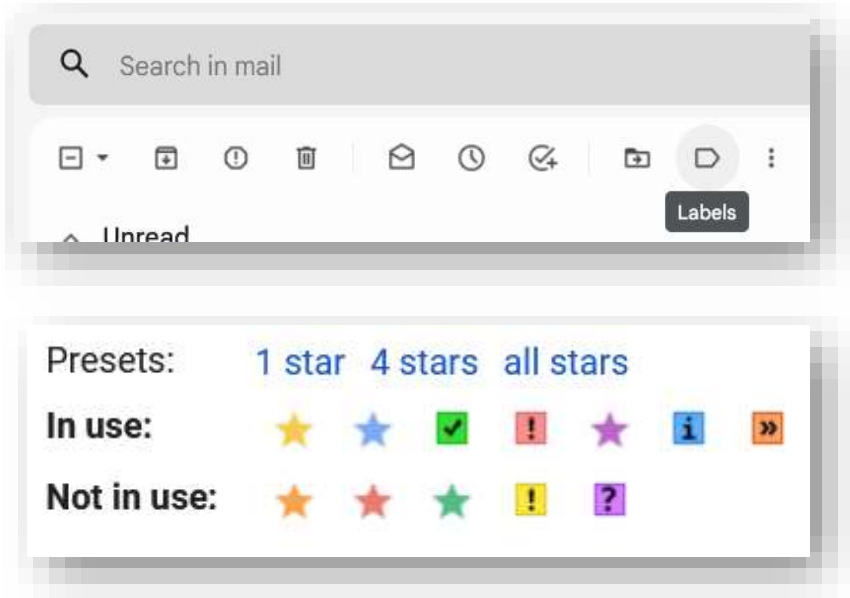


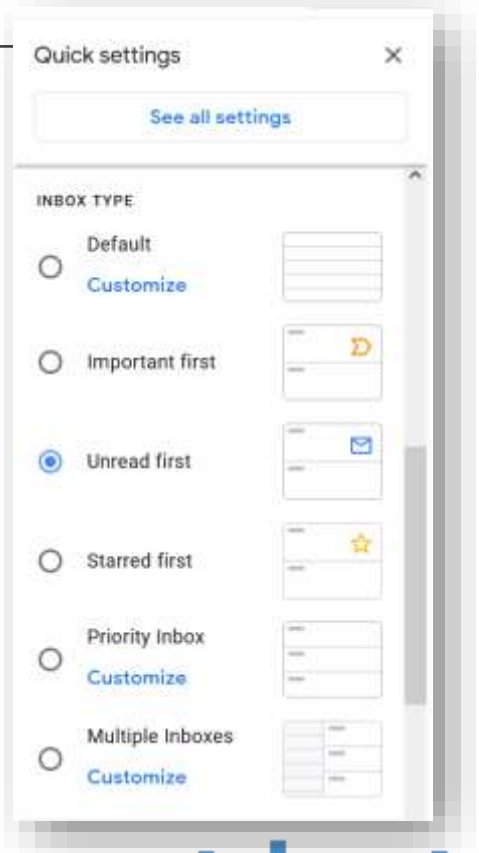
Categorizing, Filtering, and Sorting

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

- Labels
- Stars
- Inbox Type

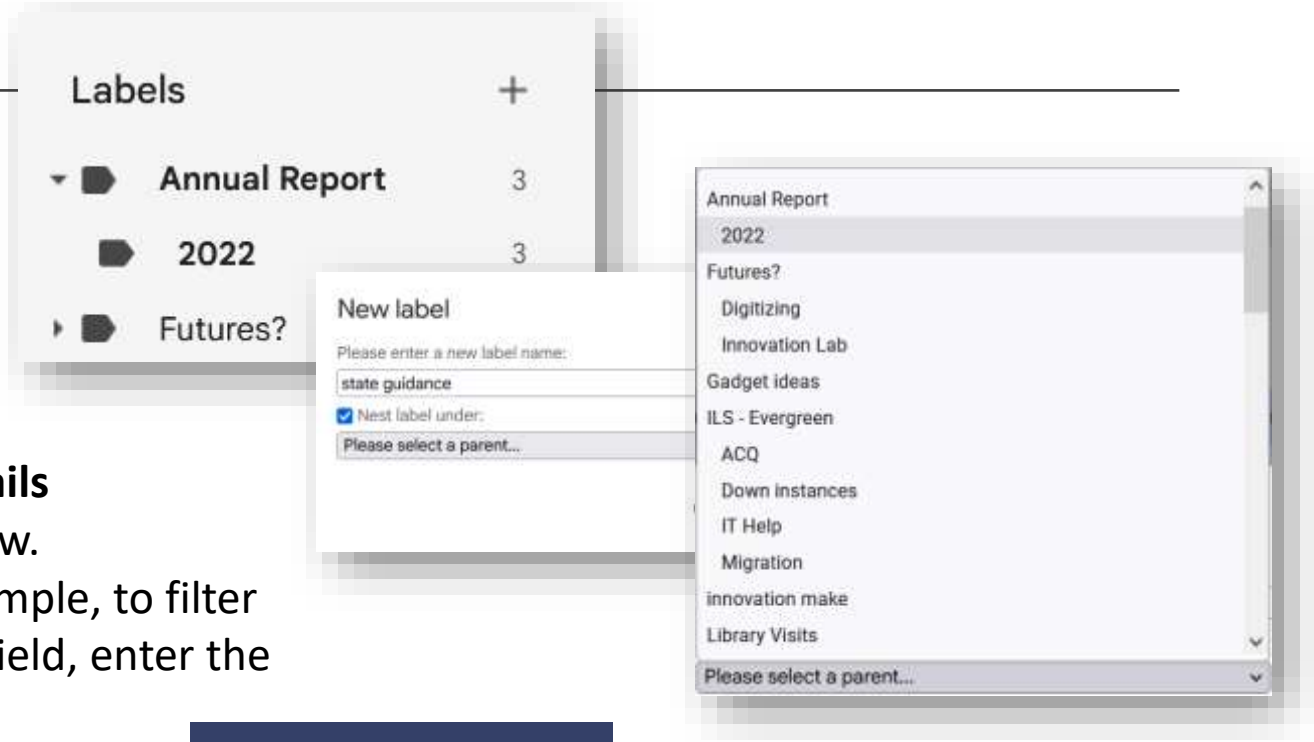
Tips for filtering & sorting emails





westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

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**.

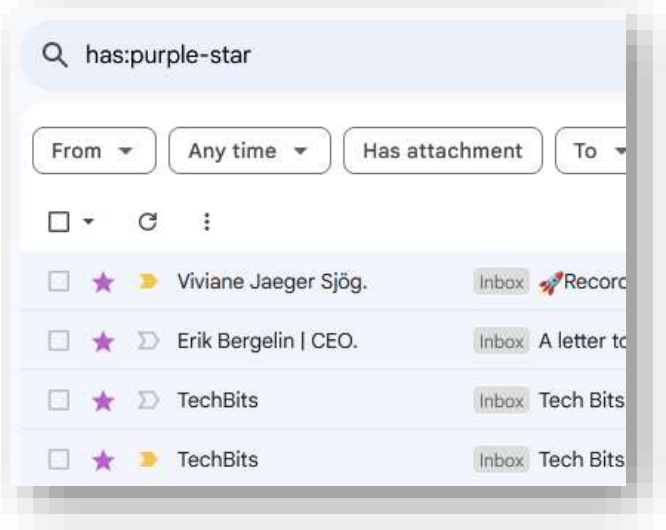
You can also create labels from individual or selected emails.

westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

Stars

In *Settings > General*, choose an icon for a purpose.

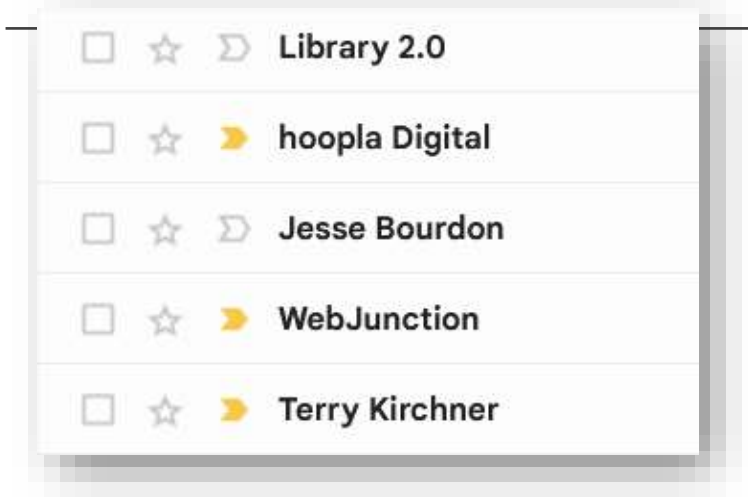
Mouse over the icon to see its name. Then search for matching emails with *is starred:* or *has:yellow-star*
(No spaces)



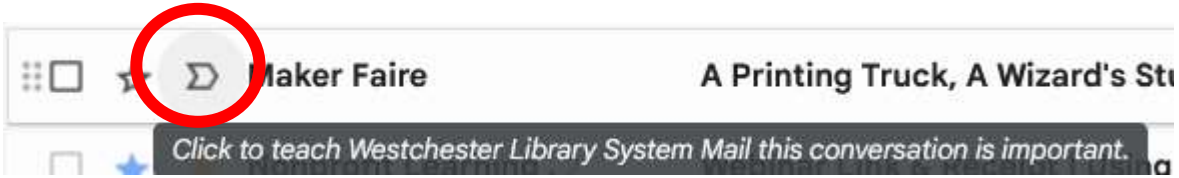
blue-star
green-check
red-bang
blue-info
orange-guillemet

westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

Importance Markers



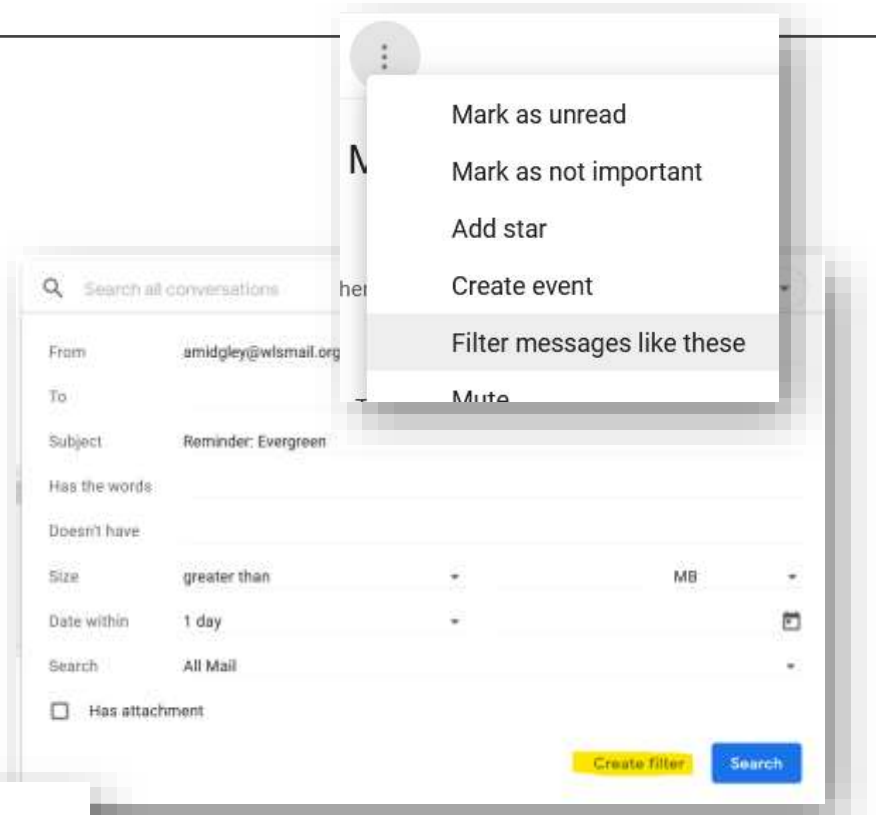
- Selecting and deselecting markers will train Gmail to know what's important to you
- The category can be hidden from your folders if you don't use it

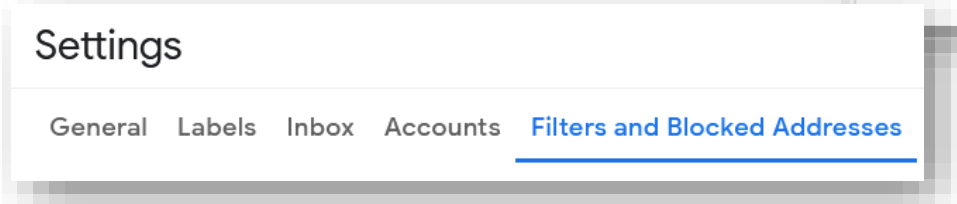


Managing your Inbox with Filters

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

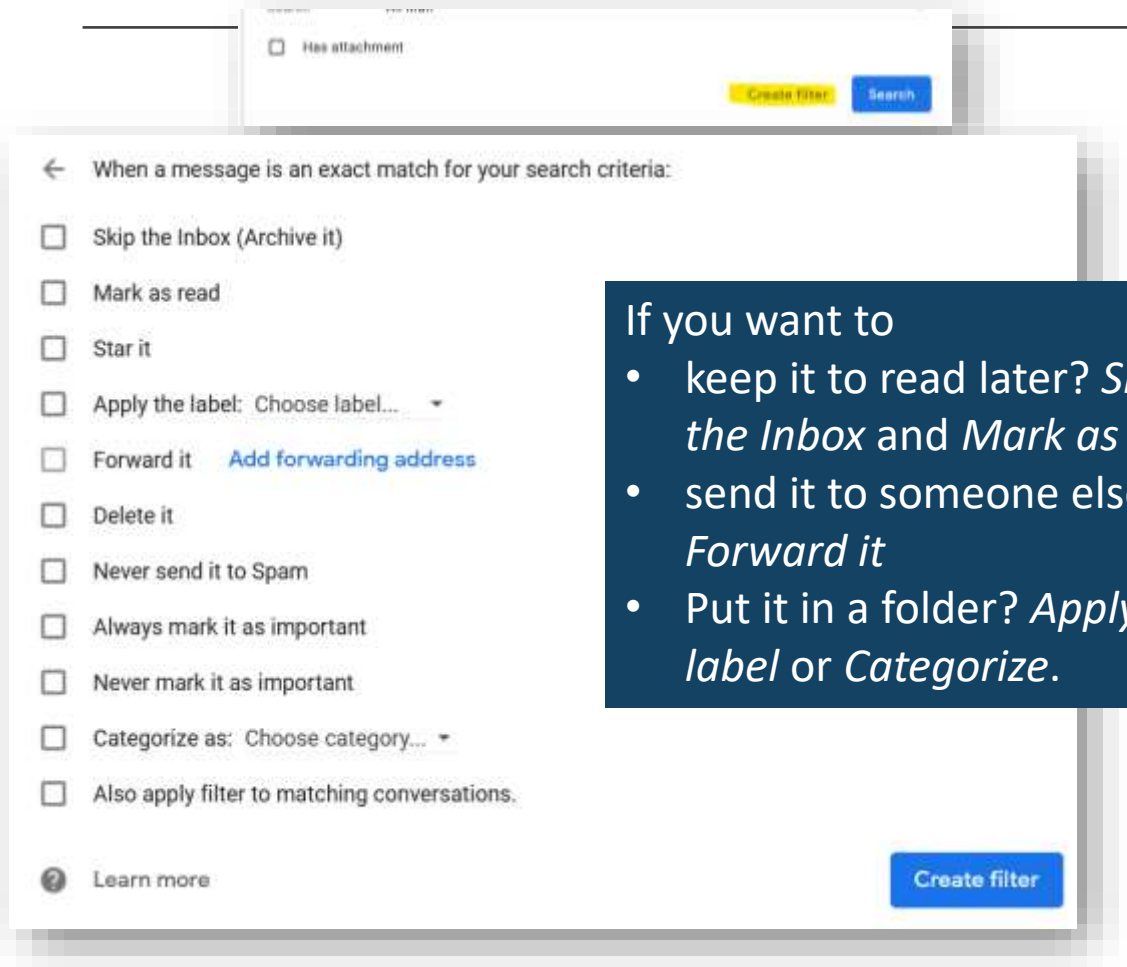
- Within a message, select the 3-dot menu and *Filter messages like these*
- From a search (include sender, subject, age, etc.)
- In Settings > Filters and Blocked Addresses, scroll down to *Create a new filter*





westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

Setting Up a Filter



If you want to

- keep it to read later? *Skip the Inbox* and *Mark as read*
- send it to someone else? *Forward it*
- Put it in a folder? *Apply a label* or *Categorize*.

All methods lead you to the Search form.

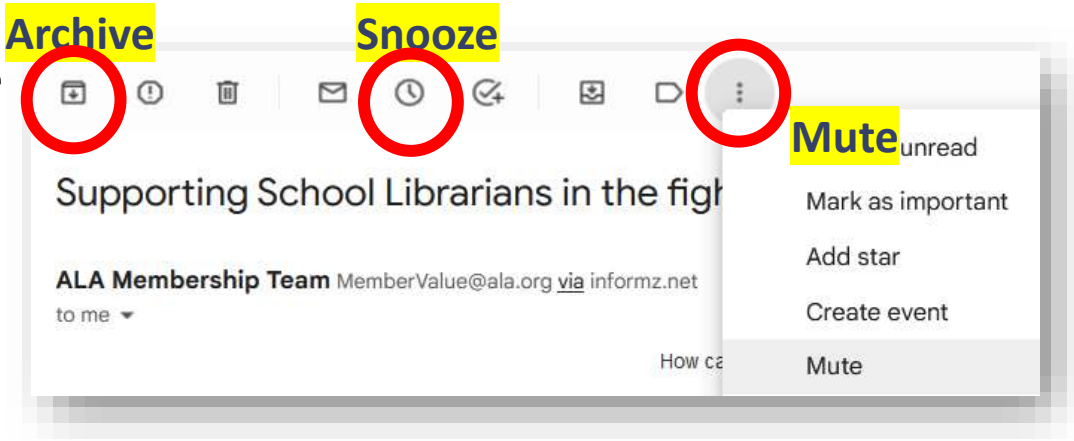
- Select **Create filter**.
- Choose one or more actions that you'd like the filter to perform on all matching messages as you receive them.
- Click **Create filter**.

westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

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.

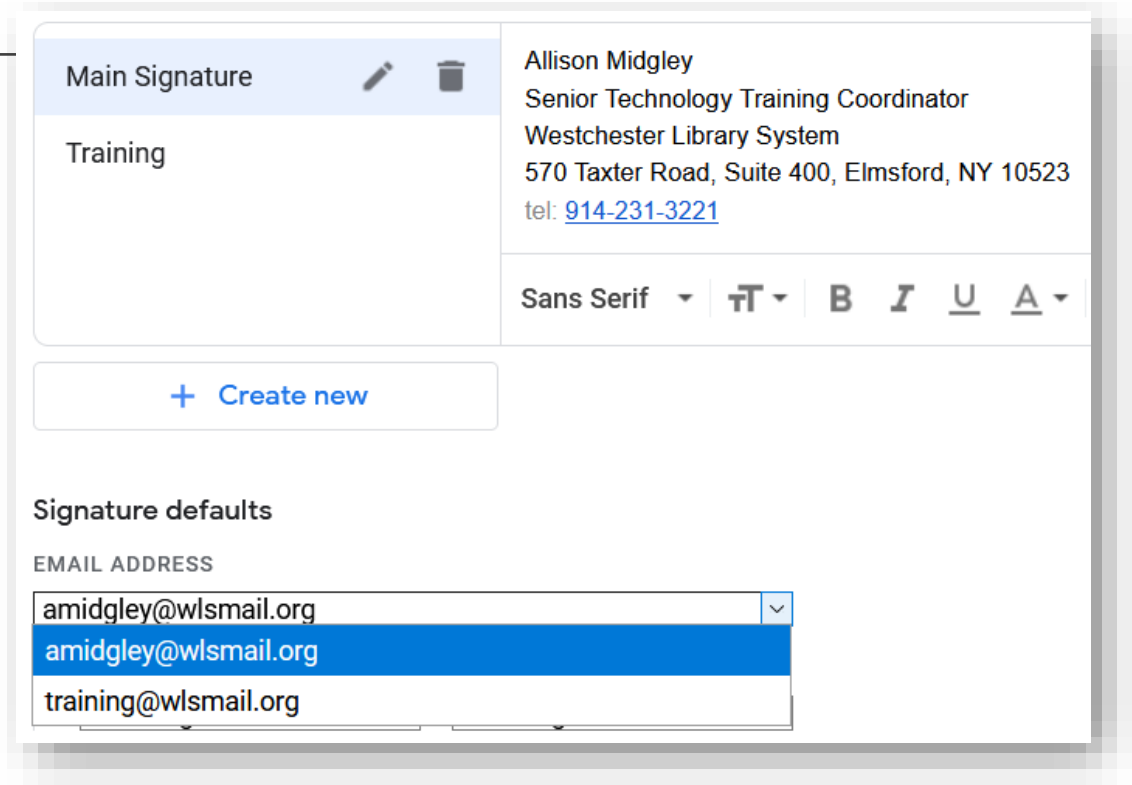


Archive and Mute Details

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

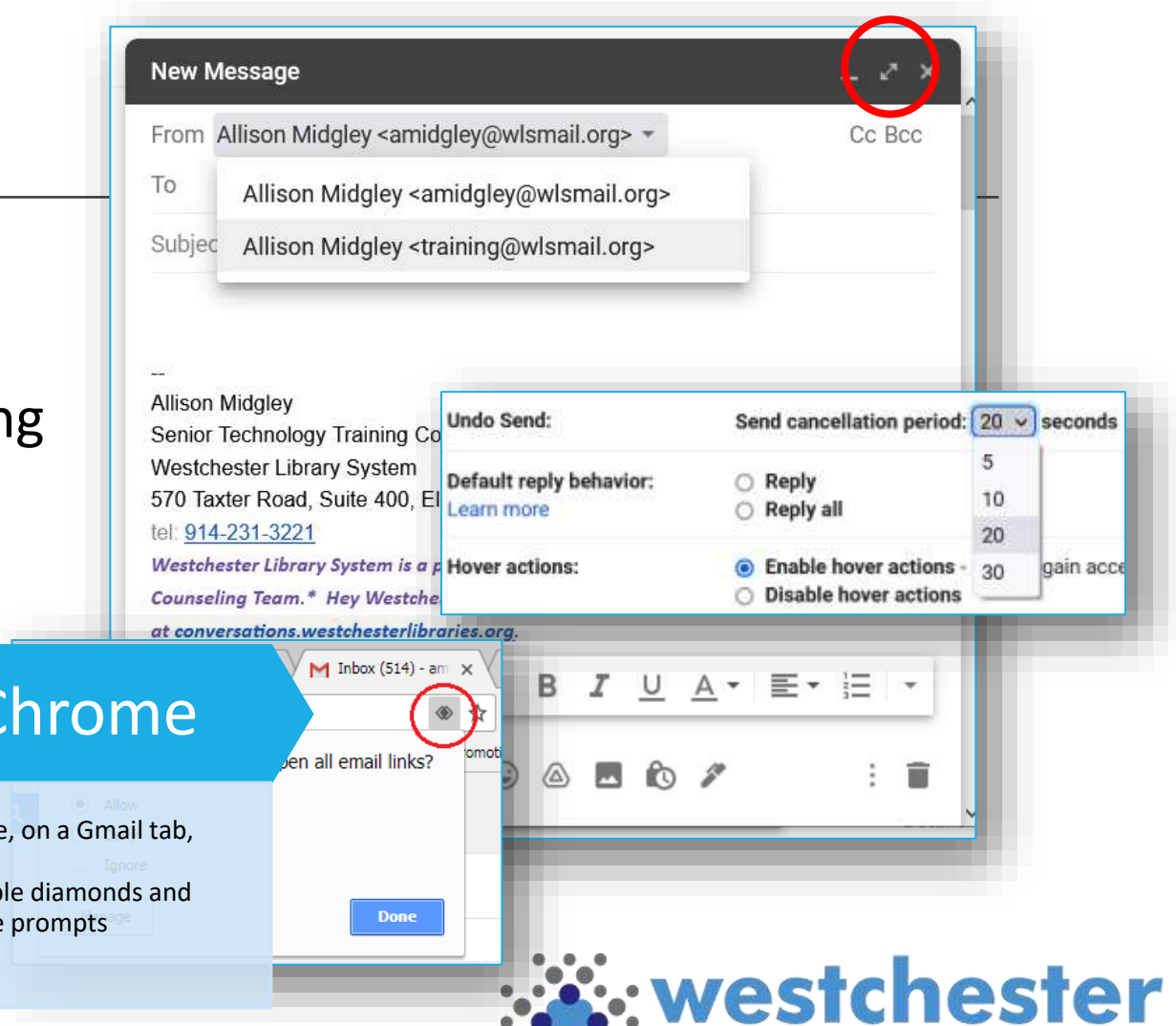


westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

Shift-click here to open an email you're composing in its own window

Sending emails

- Choose an account to send from
- In Settings, choose **Undo Send** Timing
- Set up Gmail as default mail client



Set up

Set up your browser to open Gmail when you click a link to send an email

Firefox

In Firefox, go to Options>General>Applications

Chrome

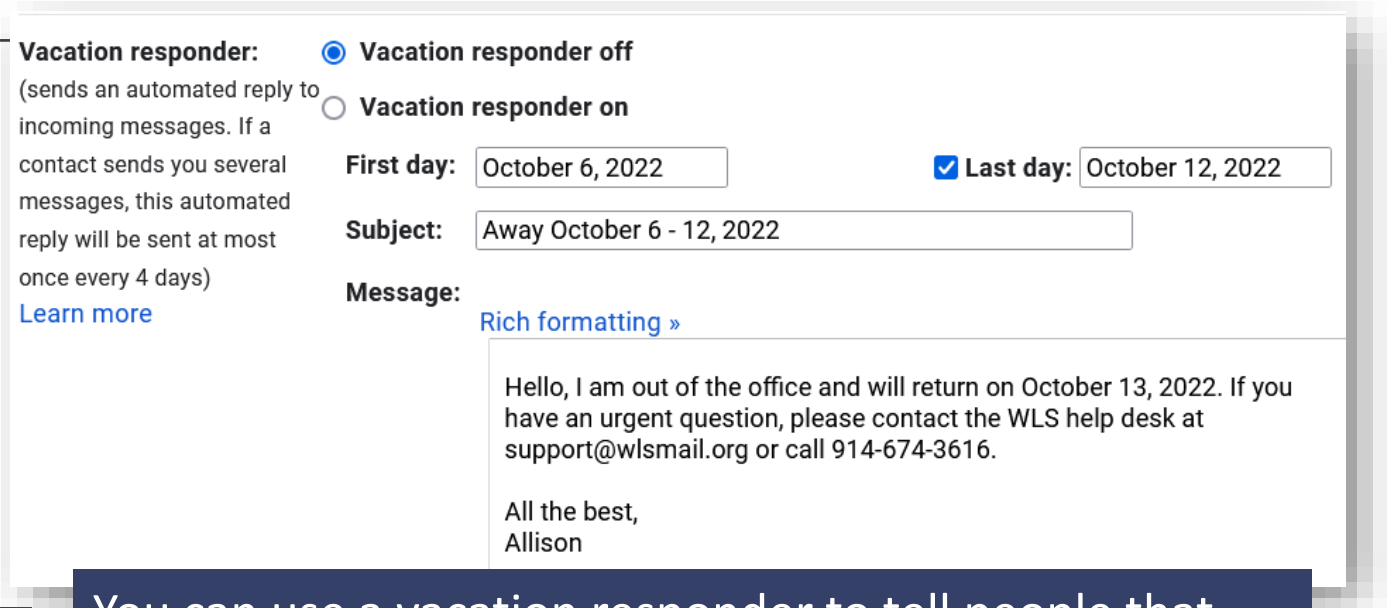
In Chrome, on a Gmail tab, click
the "double diamonds and follow the prompts

westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

Set Up A Vacation Responder Securely

In Settings > General,

1. Turn on the vacation responder
2. Choose dates to start and stop
3. Enter a subject
4. Enter a message – it's a good idea 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

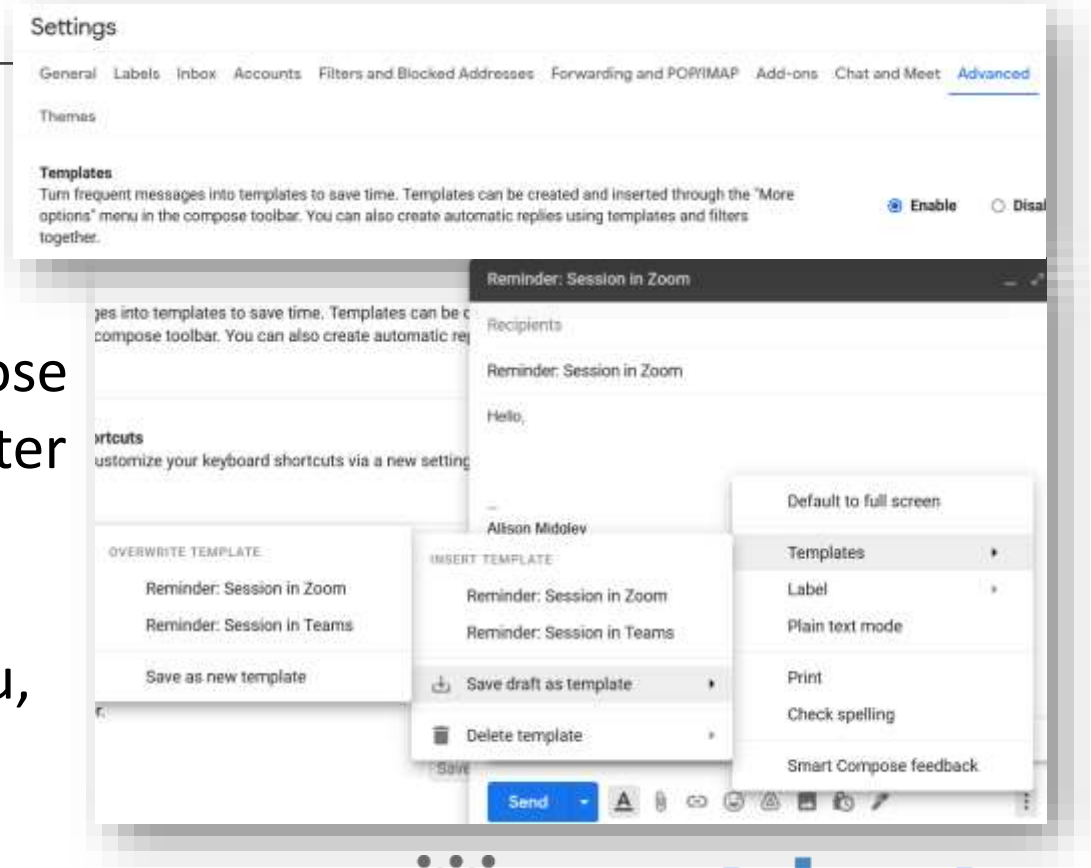
You can use a vacation responder to tell people that your email has changed – set it up to run for 1 or more months and include your new address in the message.

westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

Using templates

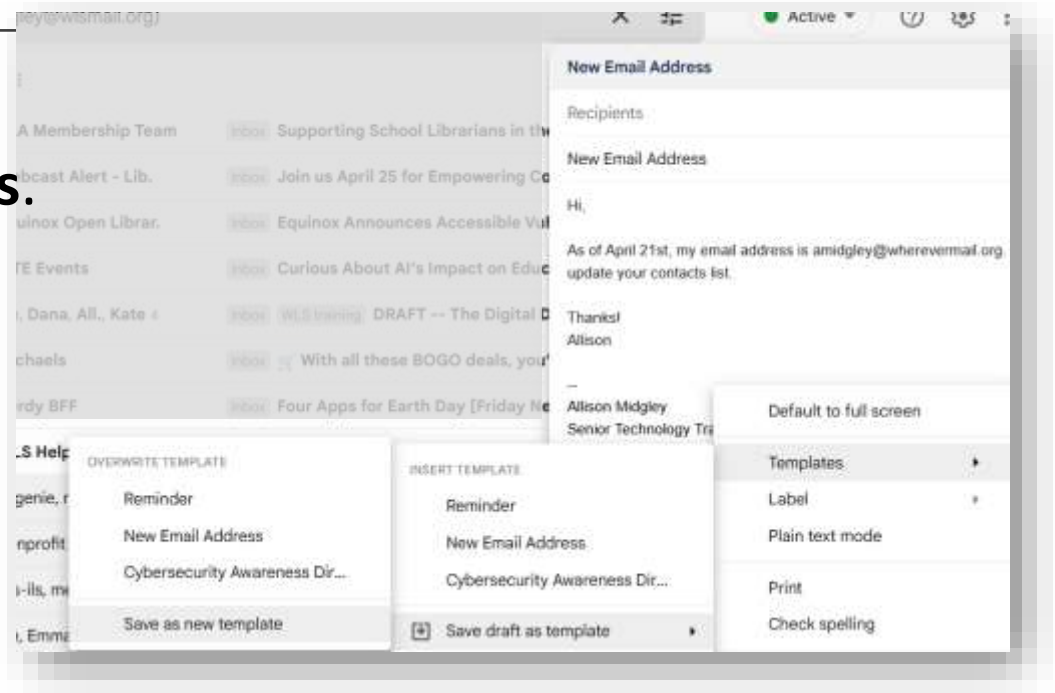
Try other *Settings > Advanced* options like Auto-Advance to show the next conversation instead of your inbox after you delete, archive or mute a conversation.
See what works for you!

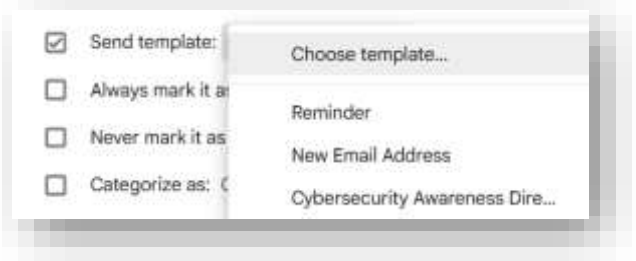
- In *Settings > Advanced,* enable Templates
- To create a template
  In the *Compose* window, write an email.
  Before sending, use the 3-dot menu to choose *Templates > Save Draft* as template, and enter a name.
- To use a template,
  open a *Compose* window, in the 3-dot menu, choose *Templates > your Named Template*.
  The message text will load so that you can customize it and then send.



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*





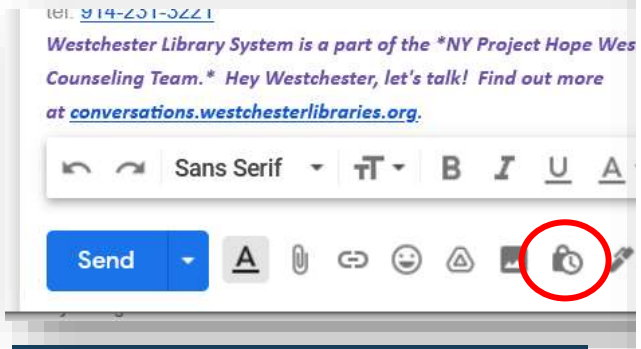
westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

Confidential Mode and Scheduling

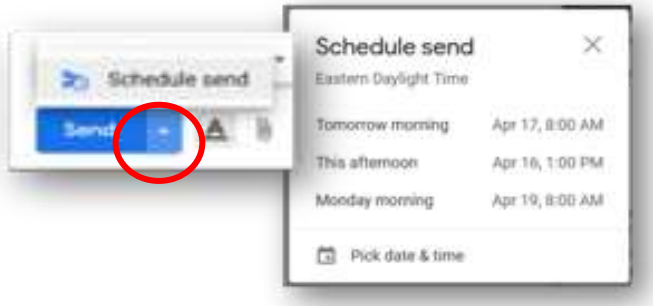
Schedule send Choose a suggested or custom chosen time

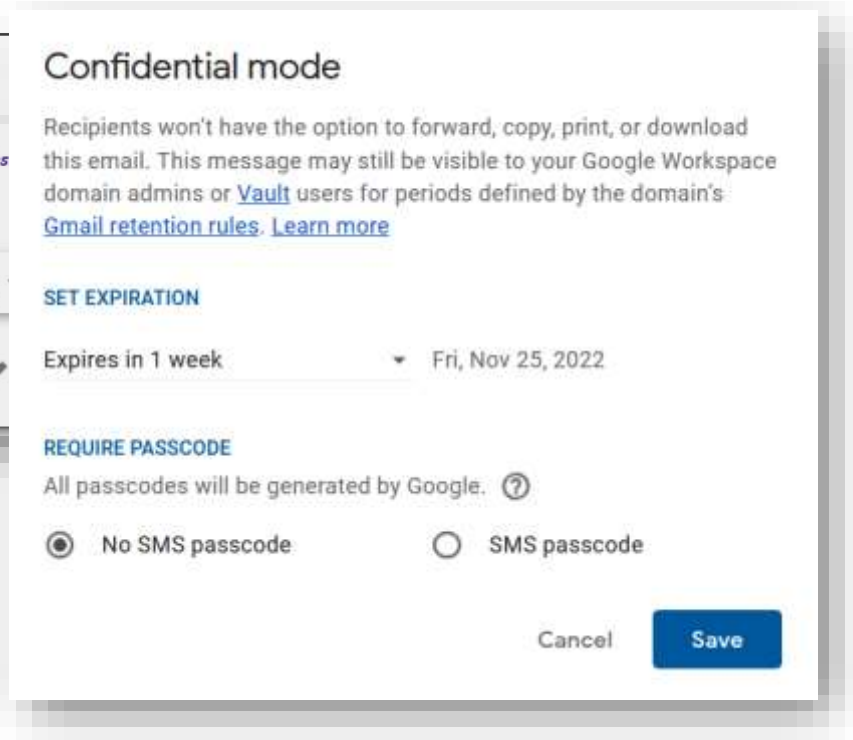
Confidential Mode

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



Screenshots can still capture email content





westchester LIBRARY SYSTEM

Empowering libraries. Empowering communities.

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 yourname**+news**@gmail.com to sign up for newsletters.
- Use yourname**+shopping**@gmail.com to create an account with an online retailer.

Step 2: Filter your messages

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

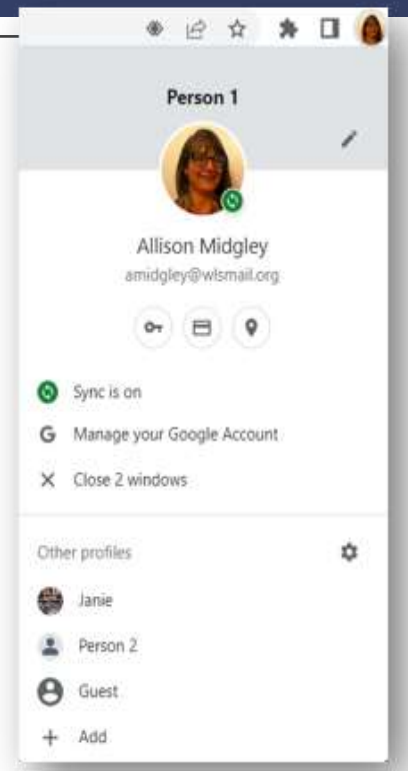
Multiple accounts

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 Chrome Browser, 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.



westchester LIBRARY SYSTEM
Empowering libraries. Empowering communities.

Gmail Links & Support

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

- Allison Midgley
- Training@wlsmail.org
- Support@wlsmail.org