



westchester
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

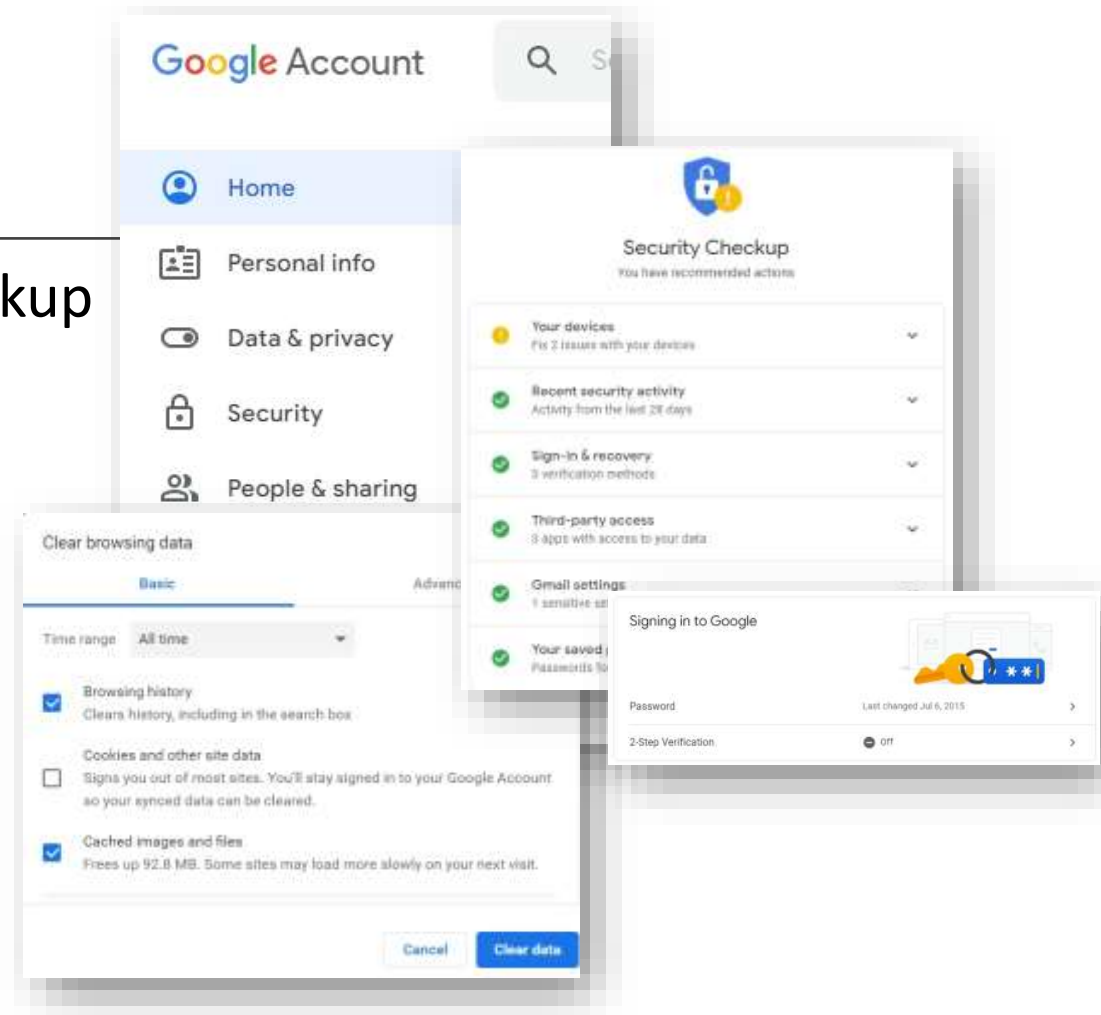
Essential Security

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!

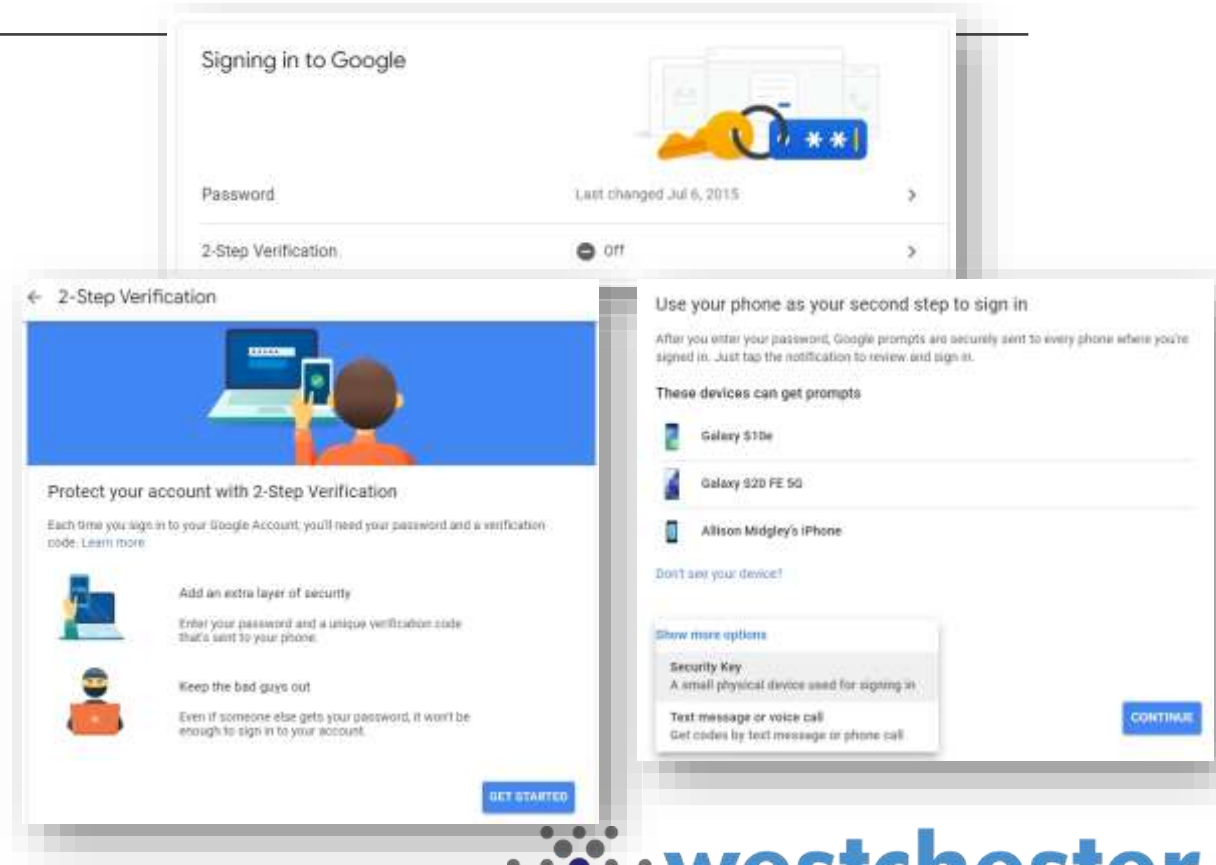


Secure Multifactor Authentication

Sign into Google and

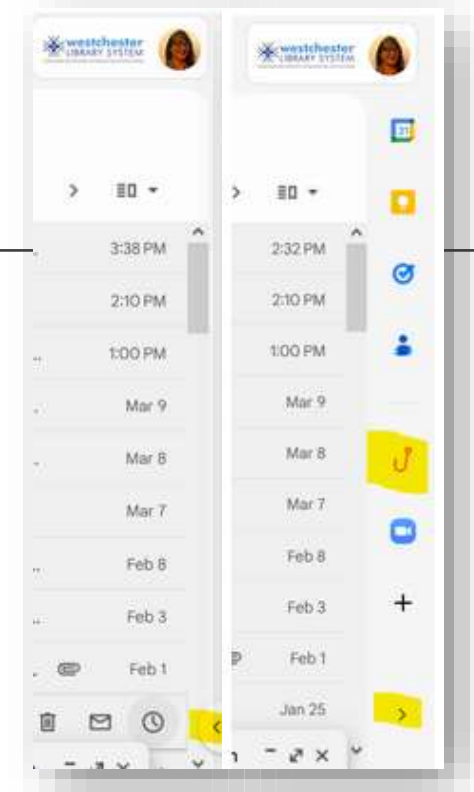
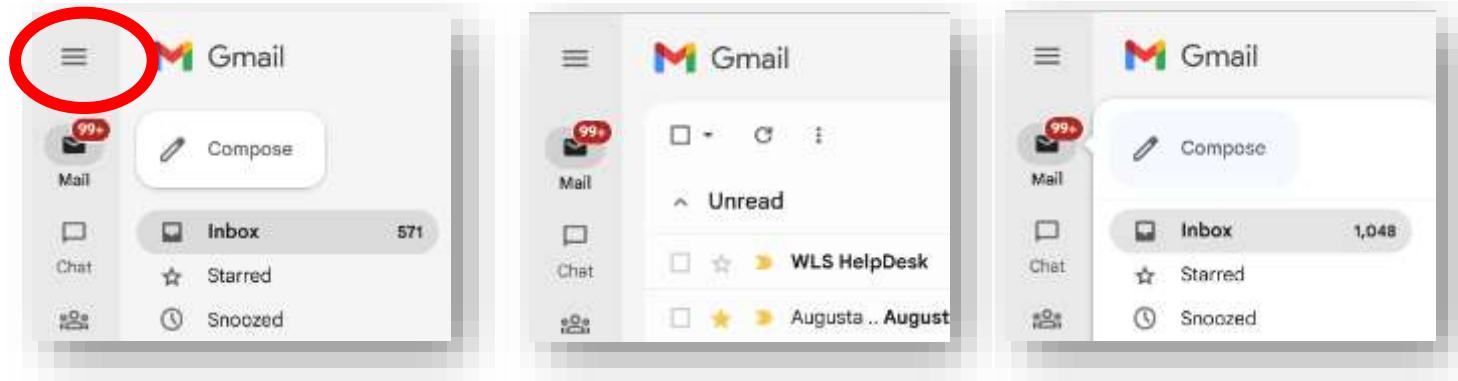
- Turn on 2-Step Verification (Multifactor Authentication or MFA)
- Use an add-on like [Authy.com](https://authy.com), [Google Authenticator](https://play.google.com/store/apps/details?id=com.google.android.apps.authenticator2), another email address, or your phone

[The Simple Reason Why Google Thinks Everyone Should Use 2-Step Verification](#)



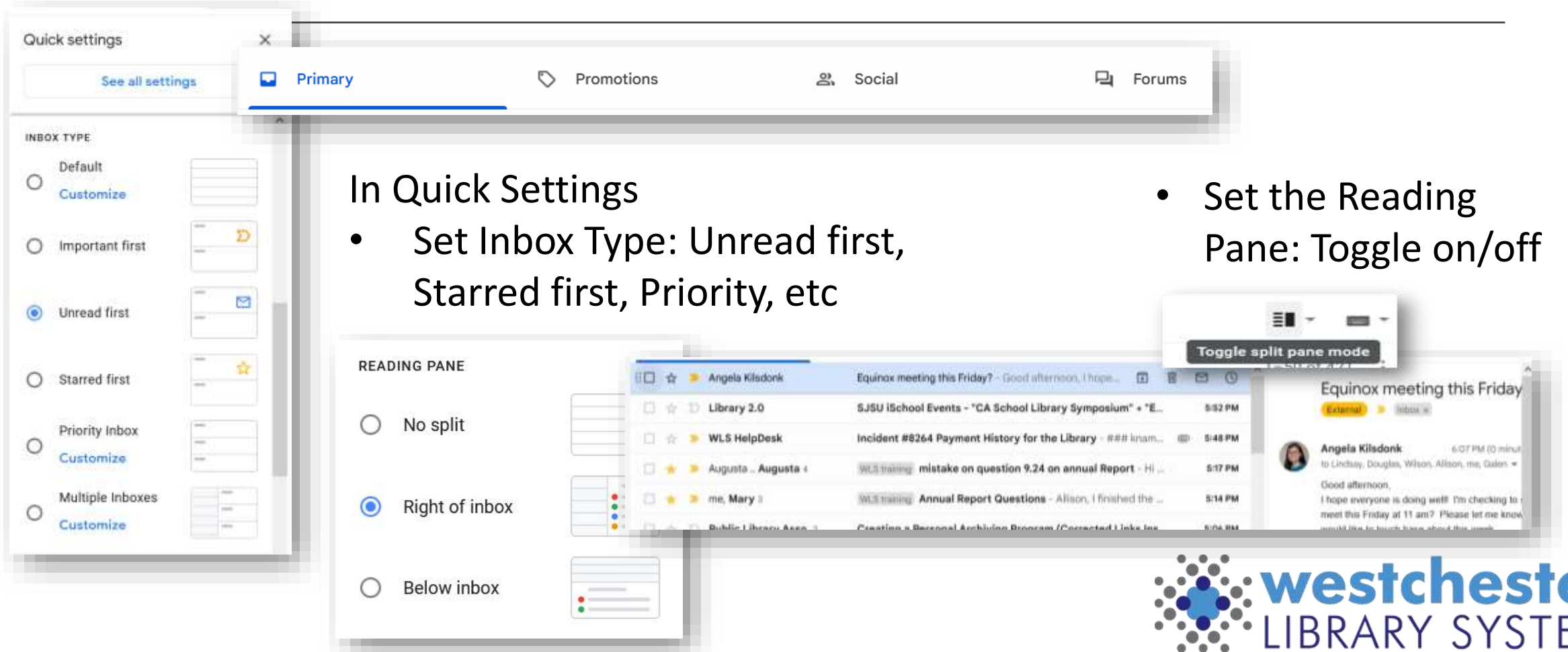
Make More Display Space

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



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

Inbox Display Options

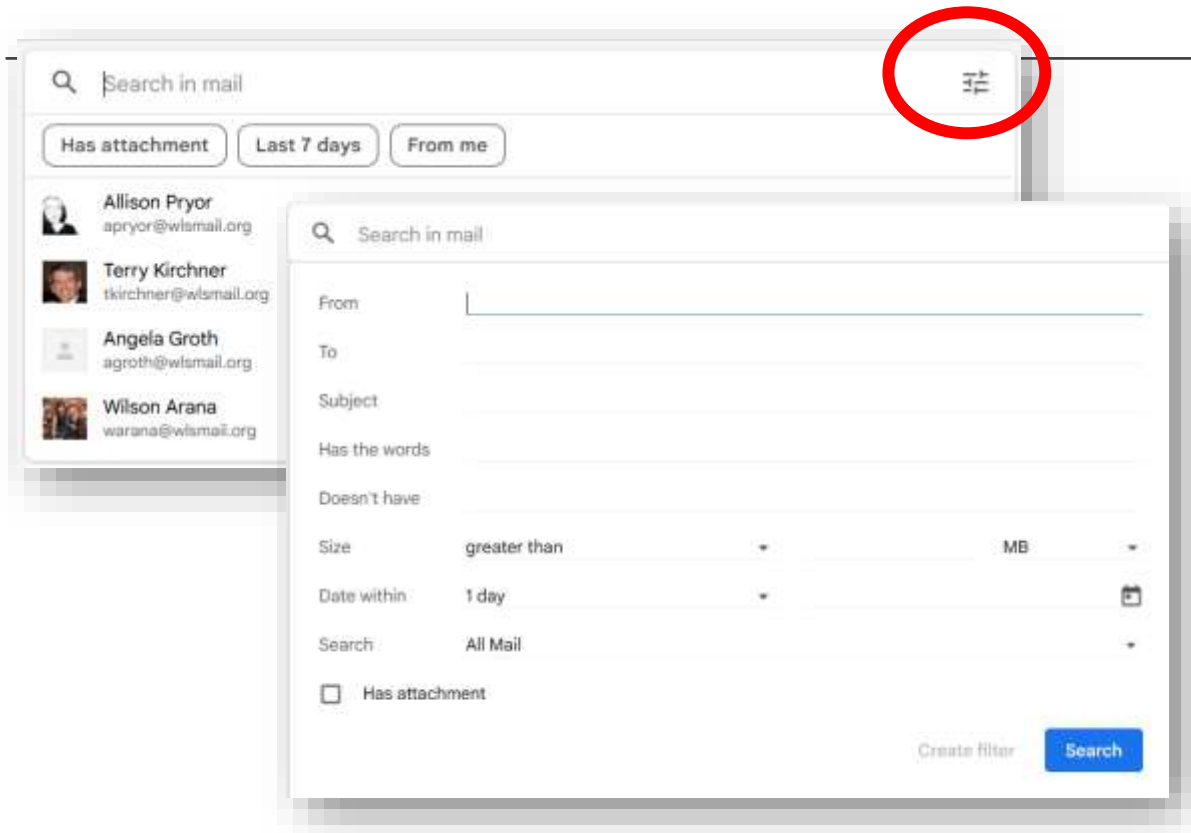


The image shows a screenshot of the Gmail 'Quick settings' interface. On the left, the 'INBOX TYPE' section has four radio button options: 'Default' (with a 'Customize' link), 'Important first', 'Unread first' (which is selected), and 'Starred first'. Below these are 'Priority Inbox' (with a 'Customize' link) and 'Multiple Inboxes' (with a 'Customize' link). On the right, the 'READING PANE' section has three radio button options: 'No split', 'Right of inbox' (which is selected), and 'Below inbox'. In the background, a Gmail inbox is visible with a list of emails. A 'Toggle split pane mode' button is overlaid on the right side of the inbox. The top navigation bar shows 'Primary', 'Promotions', 'Social', and 'Forums' tabs.

In Quick Settings

- Set Inbox Type: Unread first, Starred first, Priority, etc
- Set the Reading Pane: Toggle on/off

Quick and Full Search



Quick search

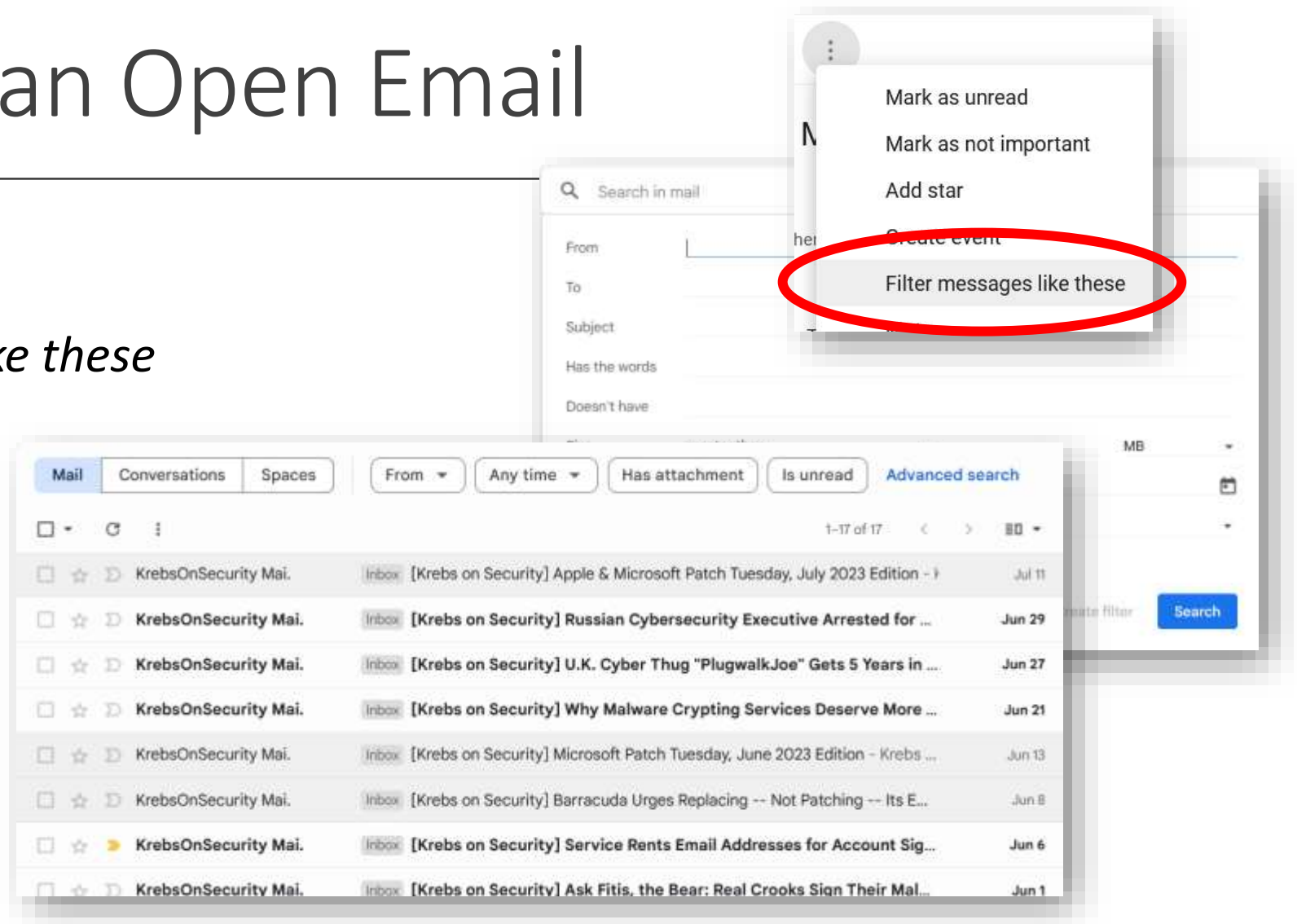
Full search is often most effective. Search by

- 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

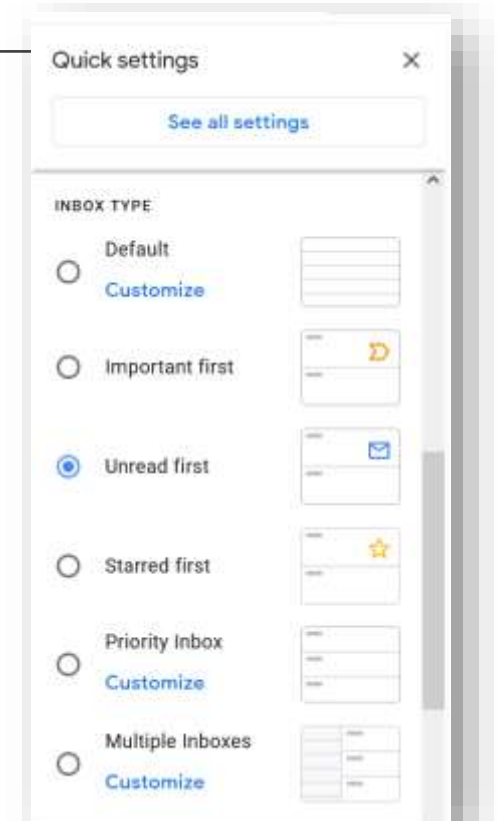
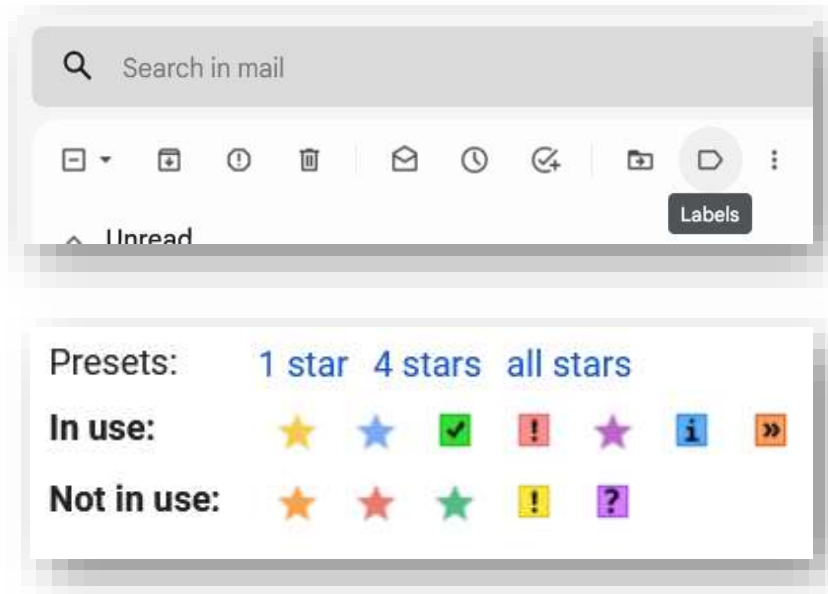


Categorizing, Filtering, and Sorting

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

- Labels
- Stars
- Inbox Type

**Tips for filtering
& sorting emails**



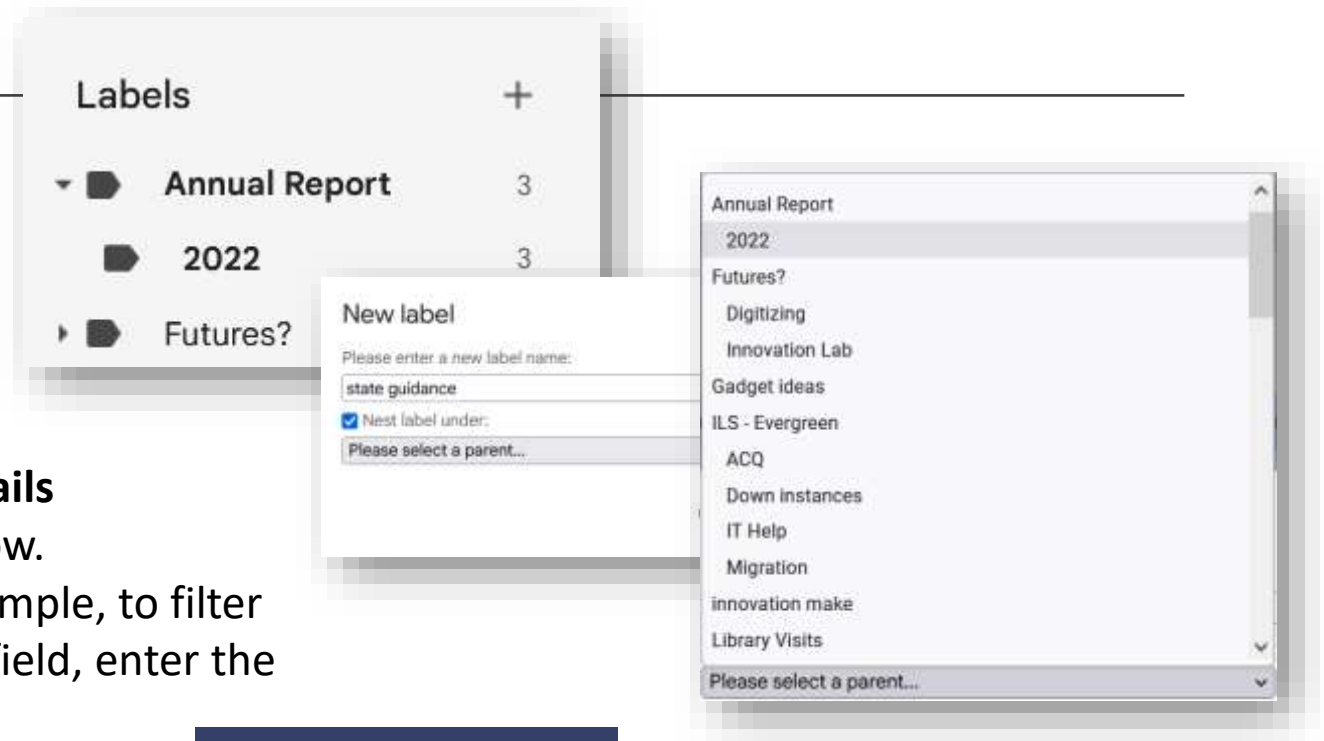
Labels

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**.

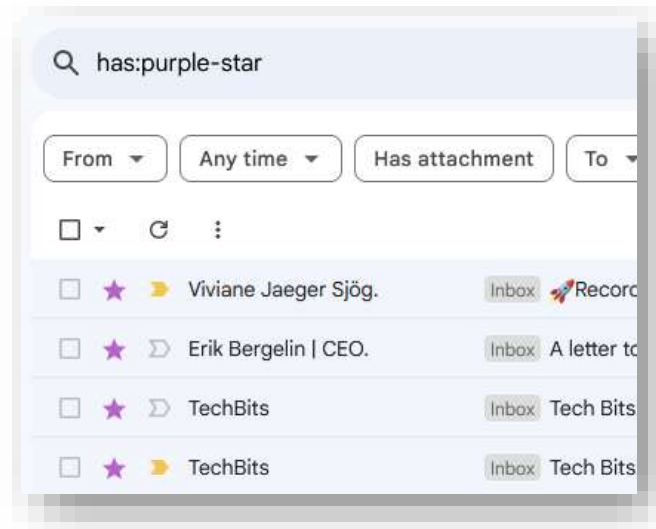


You can also create labels from individual or selected emails.

Stars

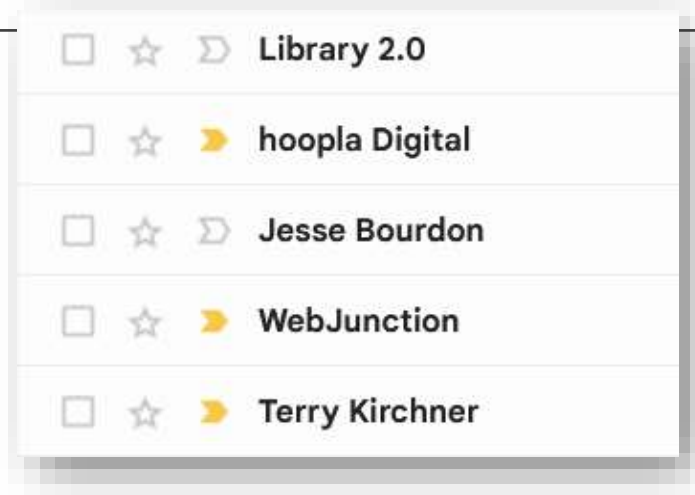
In *Settings > General*, choose an icon for a purpose.

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

Importance Markers



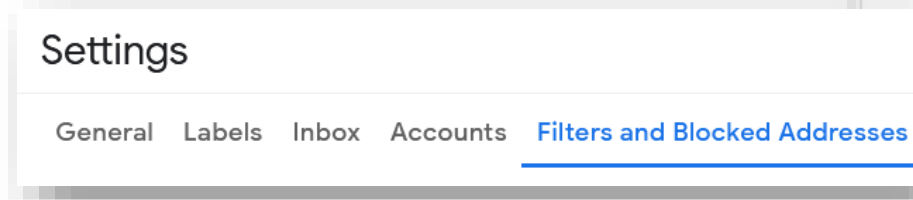
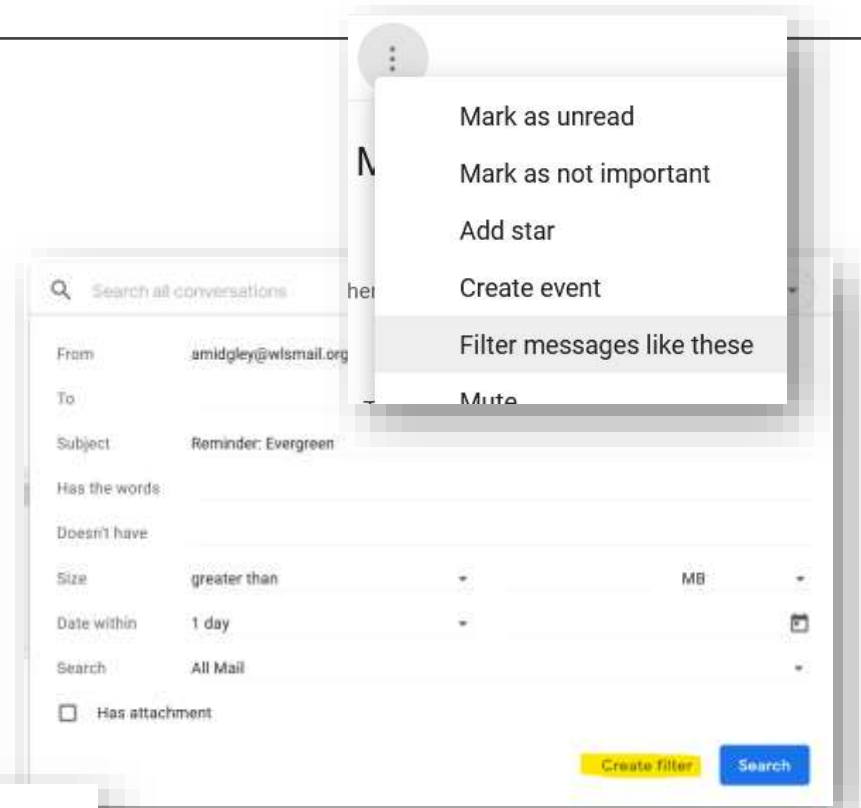
- Selecting and deselecting markers will train Gmail to know what's important to you
- The category can be hidden from your folders if you don't use it



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*



Setting Up a Filter

Has attachment

Create filter Search

← When a message is an exact match for your search criteria:

- ☐ Skip the Inbox (Archive it)
- ☐ Mark as read
- ☐ Star it
- ☐ Apply the label: Choose label... ▾
- ☐ Forward it [Add forwarding address](#)
- ☐ Delete it
- ☐ Never send it to Spam
- ☐ Always mark it as important
- ☐ Never mark it as important
- ☐ Categorize as: Choose category... ▾
- ☐ Also apply filter to matching conversations.

Learn more

Create 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**.

Snooze, Archive, and Mute

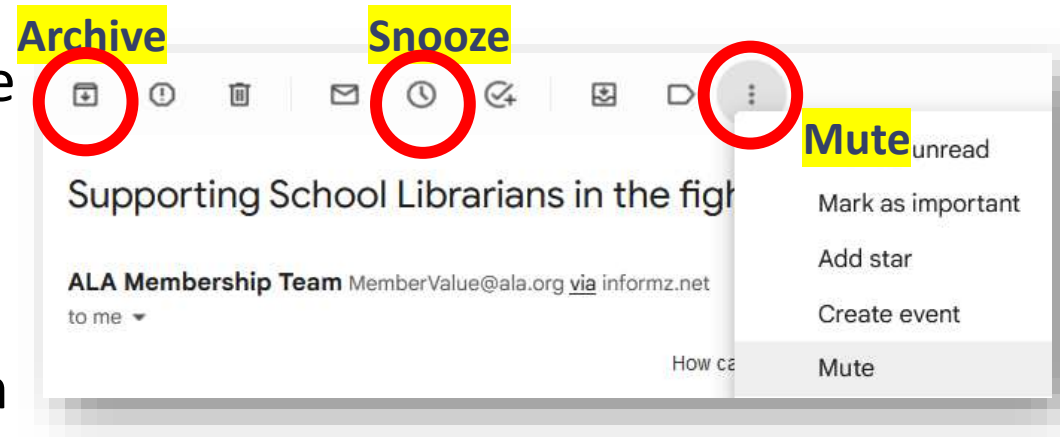
You can clean up your inbox without deleting emails using snooze, archive or mute. Your emails are moved to a label called “All Mail.”

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

The screenshot shows an email signature configuration window. On the left, there are two signature templates: 'Main Signature' (selected) and 'Training'. The 'Main Signature' template displays the following text: Allison Midgley, Senior Technology Training Coordinator, Westchester Library System, 570 Taxter Road, Suite 400, Elmsford, NY 10523, tel: [914-231-3221](tel:914-231-3221). Below the templates is a '+ Create new' button. On the right, there are formatting options: a font dropdown set to 'Sans Serif', a size dropdown set to '11', and buttons for bold (B), italic (I), underline (U), and text color (A). Below these is a 'Signature defaults' section with an 'EMAIL ADDRESS' dropdown menu. The dropdown menu is open, showing three options: 'amidgley@wlsmail.org' (selected), 'amidgley@wlsmail.org', and 'training@wlsmail.org'.

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

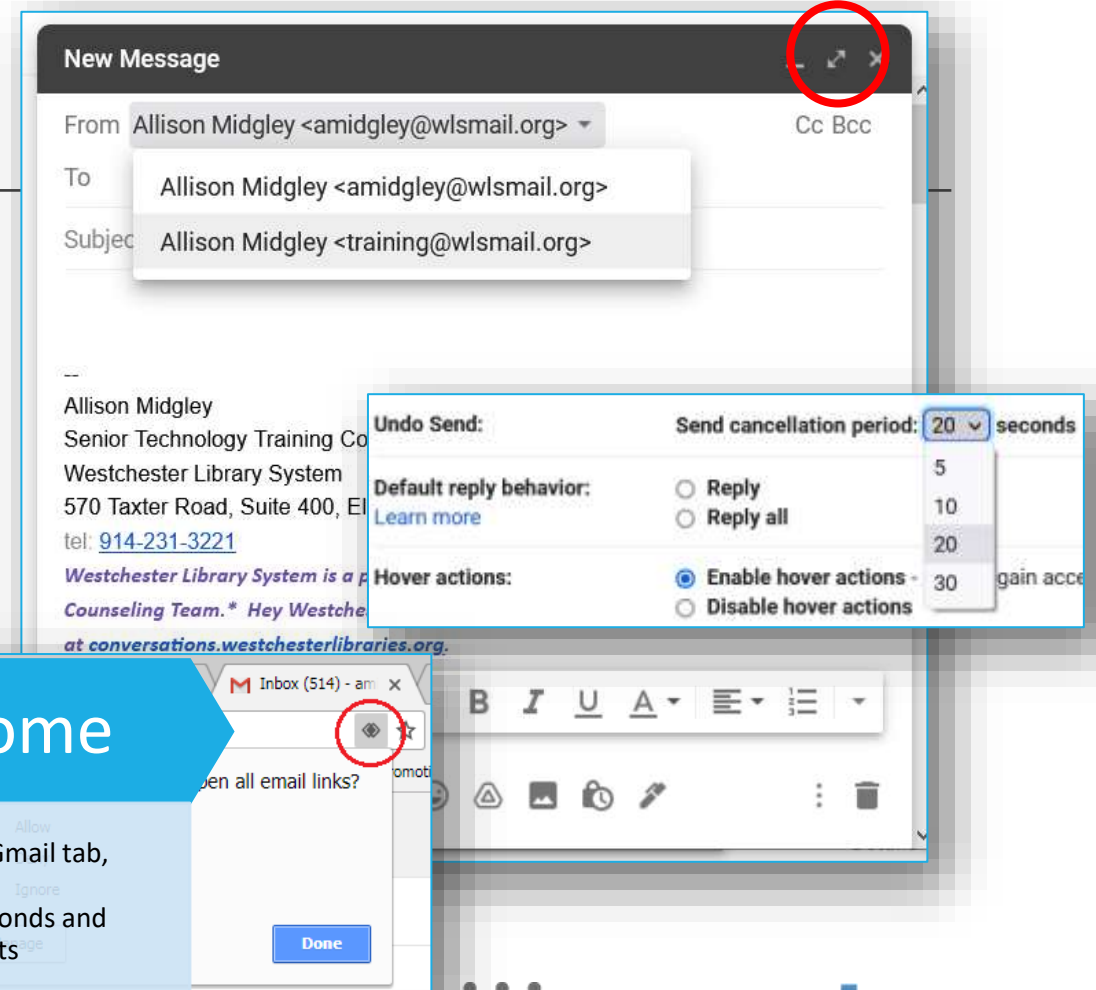
Set up your browser to open Gmail when you click a link to send an email

Firefox

In Firefox, go to Options>General>Applications

Chrome

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



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](#)

Vacation responder: (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 on**

First day: **Last day:** ☒

Subject:

Message: [Rich formatting »](#)

Hello, I am out of the office and will return on October 13, 2022. If you have an urgent question, please contact the WLS help desk at support@wlsmail.org or call 914-674-3616.

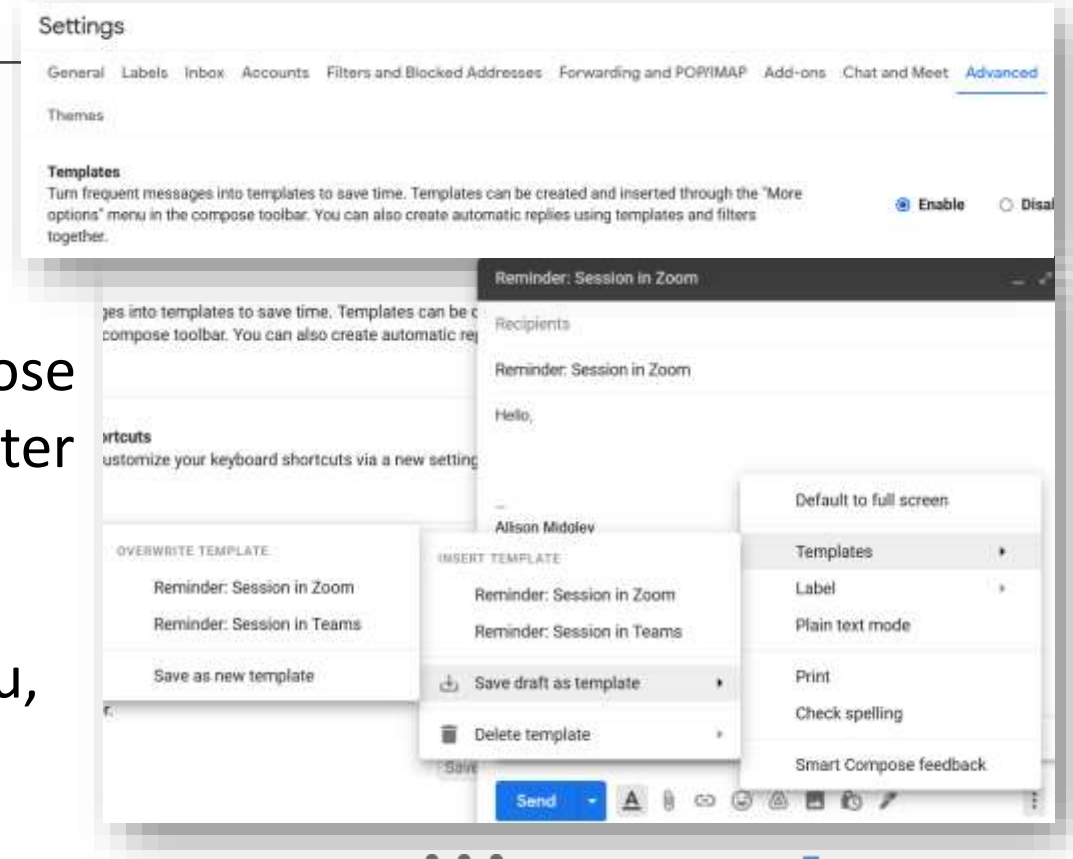
All the best,
Allison

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.

Using templates

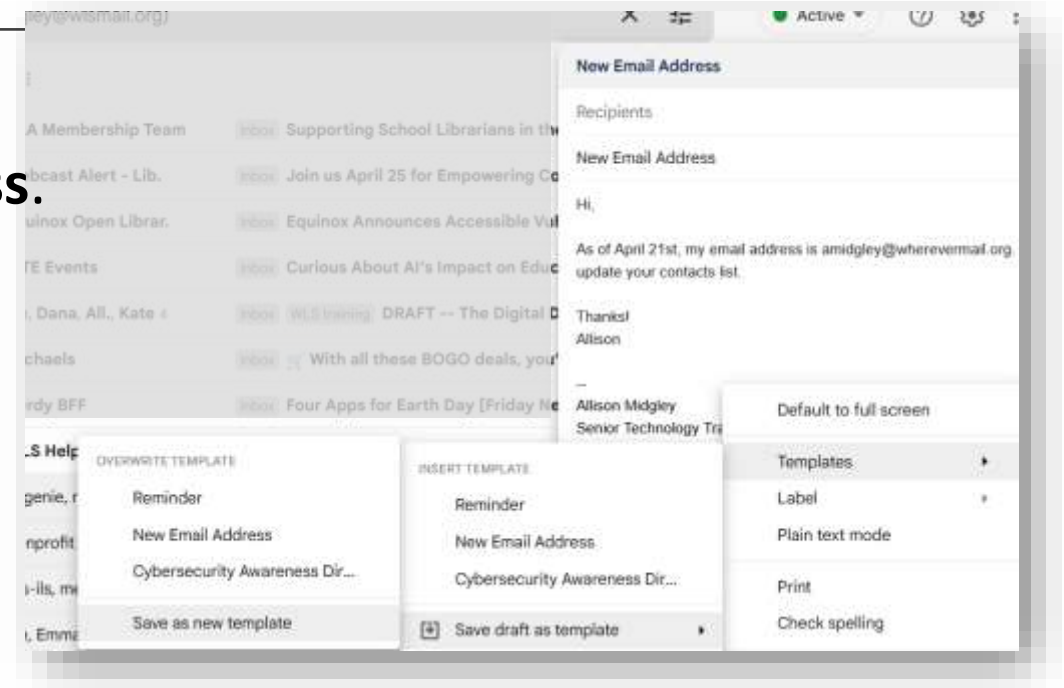
Try other *Settings > Advanced* options like Auto-Advance to show the next conversation instead of your inbox after you delete, archive or mute a conversation.
See what works for you!

- 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*

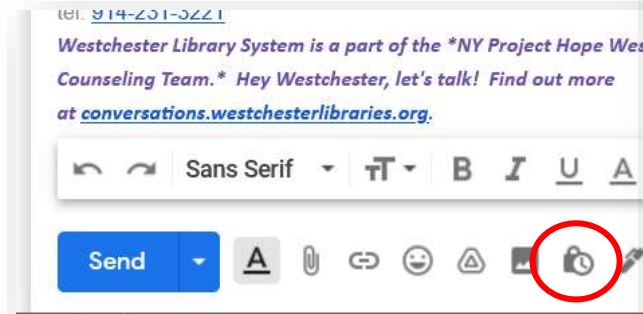


Confidential Mode and Scheduling

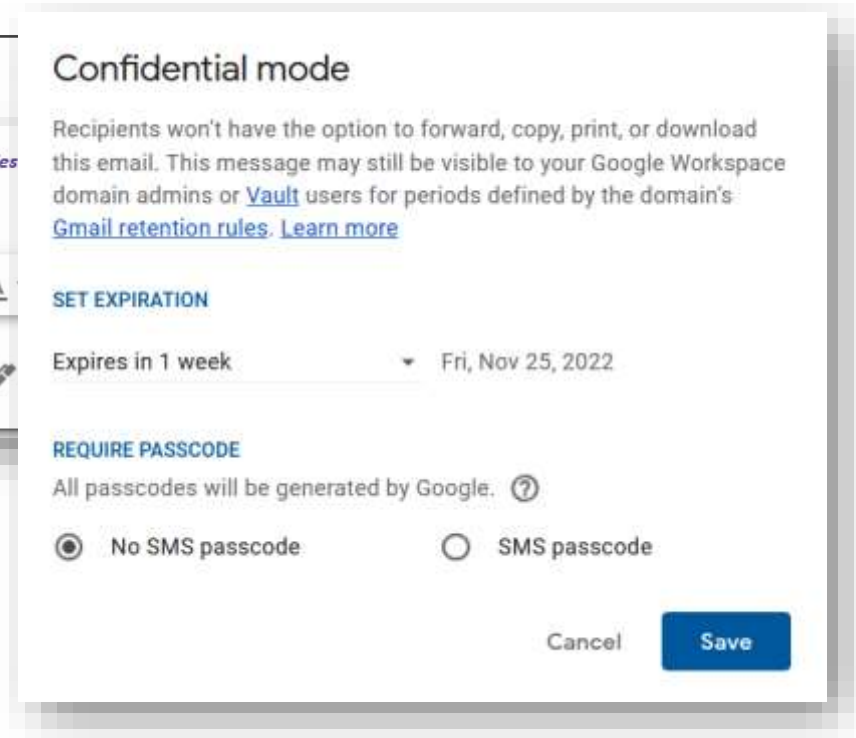
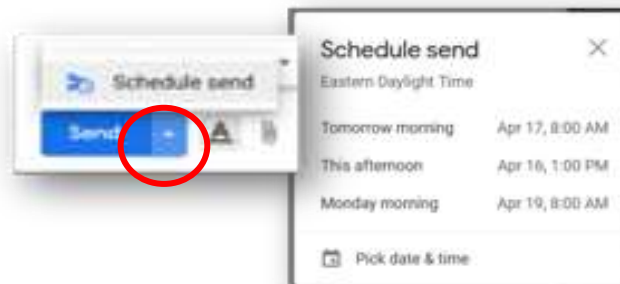
Schedule send Choose a suggested or custom chosen time

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



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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

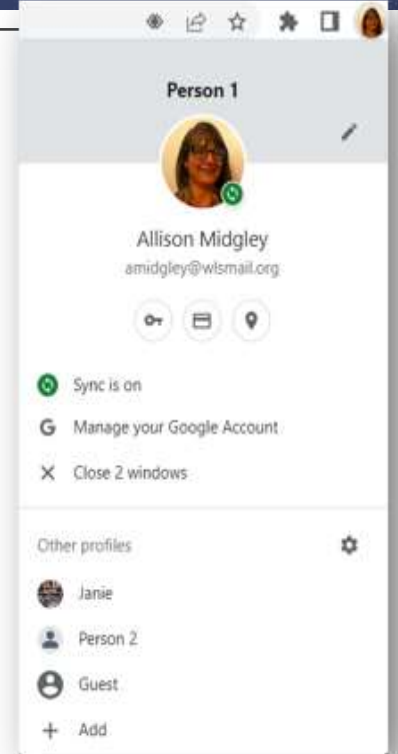
Multiple accounts

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.



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