

Final Project: Outlook to Gmail Transition Training

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Executive Summary

Users will be trained on Google's Gmail product. Gmail contains many products that are contained within it. Gmail contains email functions as well as calendars, note taking, task lists, and chat functions. The main Gmail program allows users to send and receive emails. Emails can be created with attachments and sorted into folders for better organization. The calendar section of Gmail allows for scheduling of private or public events. Private events can only be viewed by the organizer and those invited to it while public events are viewable to anyone. The task list and note taking functions can be used similarly to generate basic lists, with some key distinctions. The task list can have subtasks and due dates while the note app can have attachments like web links and photos. The chat function allows for real-time communication between coworkers or even others outside the company who have a Google account. This includes the sending of various file types such as pictures, audio, or documents.

The manual will consider the needs of the business and the various skill levels of the end users. End users with low technical skills will be provided detailed step-by-step instructions on how to perform the actions required by the company. Most end users will only require basic training such as sending and receiving emails, instant messages, and working in the calendar and contacts sections of the Gmail website. More advanced users will also be given training on how to use the task list and note taking application as well as advanced features such as calendar sharing and advanced search functions. Users of all levels will have access to the trainings so that they may grow their skill set in their free time.

Each training will be broken down into step-by-step instructions for each task. Tasks will be ordered in an order that each new training builds on the skills learned in the previous one. For example, learning how to log into the Gmail website will be first, followed by how to create a

contact, followed by how to compose an email with attachments. This will be followed by additional trainings that build on these initial skills.

By creating this training document, it becomes a document that users will be able to reference later if they forget what they learned. This will prevent the need for additional refresh training later down the line. Also, this will allow users to study at their own pace as opposed to an instructor led training which may be too fast for new users or too slow for advanced users. Additionally, this document can be easily posted on internal company websites or easily emailed as a PDF to users to in case they lose the copy that has been provided to them. Videos would also have this capability but require much more bandwidth and aren't as simple to pick up and put down or study in employee down time.

Purpose of this training

The purpose of this training is to show new users how to complete the basic tasks necessary to perform their job, regarding using email and scheduling appointments. This guide is intended to only show the basics of each task and how to complete it and is in no way meant to be comprehensive or include all the features of the Gmail product and service. Additional training available for those who desire or require it. Upon completion of this training, the user should be able to navigate to the Gmail web page, log into the service, add/edit/remove contacts, send emails with and without attachments, and schedule appointments that may or may not need attendees invited. The training includes references to products or services that are not trained on in this guide but may be in other user trainings that are available.

Signing into the Gmail service

To begin using Gmail, first log into the website. There are multiple ways to get to the email section of Google, however the easiest is to go to <https://www.gmail.com> and it will

redirect to the login screen seen below (Fig. 1). From here, enter the company email address to begin the sign in process. The full email address is required for the sign in, ex user@xyzcomapny.com to make sure the correct account is signed into. Once the email address is entered, click the Blue next button seen in figure 1. Next, will be taken to the next screen shown in figure 2 below.

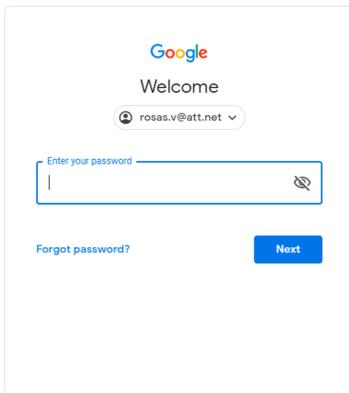


Figure 1

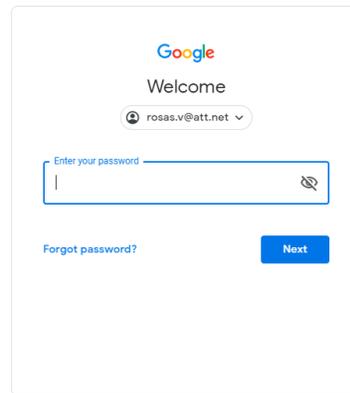


Figure 2

Once the password has been entered, click the blue next button to be taken to the main Gmail screen seen below in figure 3. The eye icon can be clicked to view the password that has been entered before clicking next, however take care that no one else can see what has been entered.

As seen in figure 3 below, there are multiple folders created automatically to help keep the inbox clutter free. To begin sending emails, simply press the + sign in the upper left corner and enter the email address. Gmail automatically searches the address book to look for matches.

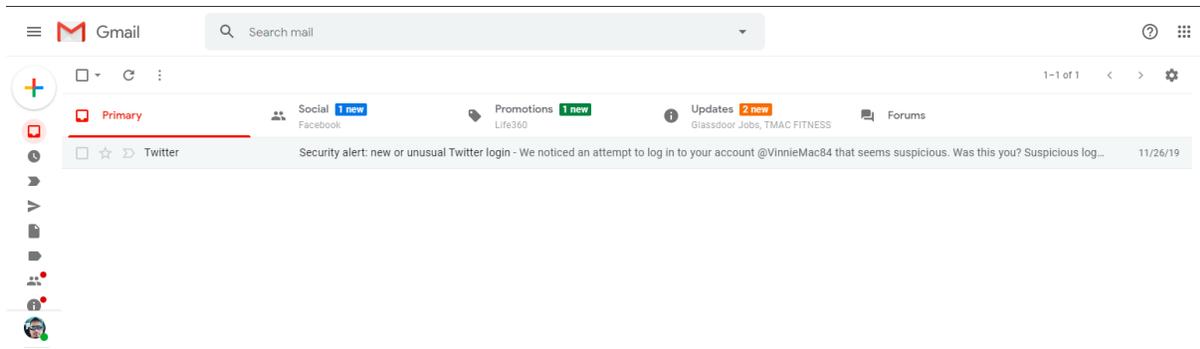


Figure 3

Managing contacts in Gmail

Emails can be sent by simply entering the email in the compose window seen below in figure 4, however, storing contacts in the integrated address book will make contacts easier to find and keep track of. There are multiple ways to save a contact to the address book. The first is by clicking the menu button inside an email and select “Add [sender’s name] to Contact List” and the send will be added to the contact list with the name displayed in the email and the email address it was sent from. To manually add a contact, or edit an existing contact, go to <https://contacts.google.com>. If already signed in, the contacts page shown (fig. 4) below will be displayed, otherwise the sign in screen from figure 1 will be displayed.

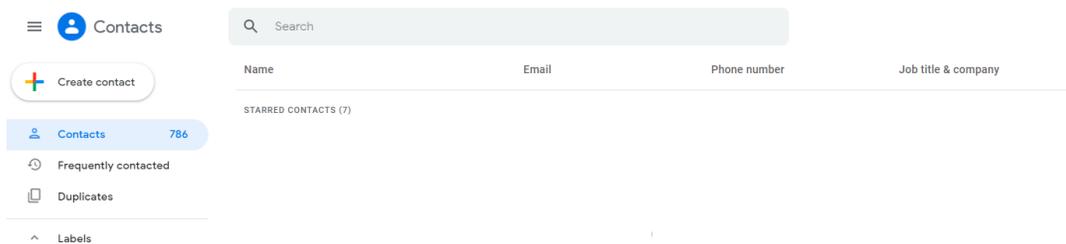


Figure 4

From here, a new contact can be created, or existing contacts can be edited. The search bar at the top allows for quick access to contacts if the contact list is large. To create a new contact, simply click the “+ Create contact” button shown in figure 4. That will show the new

contact box shown in figure 5 below. Fill in any information for that contact and click save in the bottom right corner of the new contact dialog. Once it is saved it is immediately searchable and usable to send messages to. To remove a contact after saving it, enter the name in the search or scroll to find the contact, click on it to open it, click the menu button, and select the trash can icon. To edit the contact, follow the same steps but click the pencil in the upper right corner and the edit contact screen will appear. It is the same as the new contact screen shown below but the information is already filled.

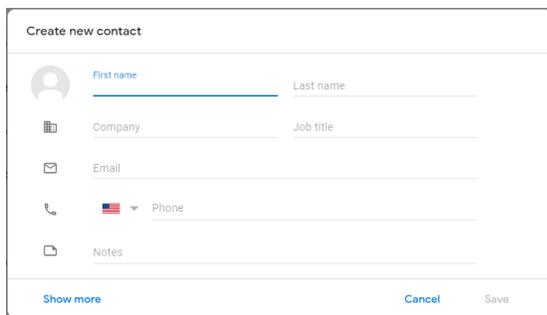


Figure 5

Composing emails in Gmail

To send a new email, there are multiple ways. If already in the contact list, select the person who will receive the email, then click their saved email address. A new window will open, and the new message can be composed. Shown in figure 6 below. The selected contact will be automatically filled in. If in the Gmail email page, clicking the “+” in figure 3 above will give you figure 7 in a small pop-up window at the bottom right of the screen. This can be expanded to full screen if designed by clicking the opposing arrows in the upper right corner of figure 7. Composing a new message this way will not autofill any contacts, but the contact list is searchable from the “To” field, just start typing the name or email address. If no file attachments are necessary, simply fill in the fields and click the blue send button in the bottom left corner.

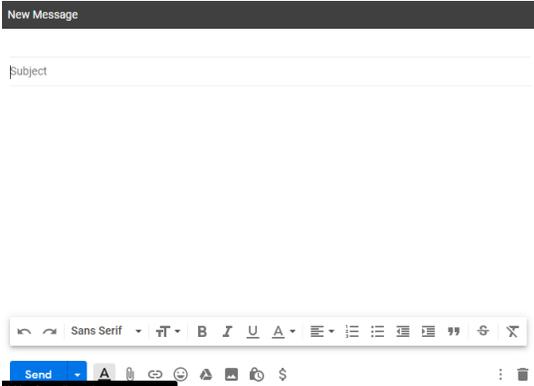


Figure 6

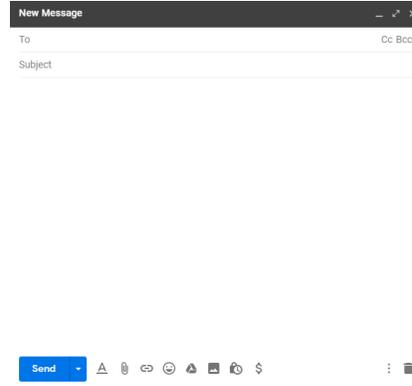


Figure 7

If an attachment, such as a document or other file is needed, there are multiple ways to do that. The first is to find the file on the computer being used, then drag and drop the file into the new message window. This works for any file type. Another way is to click the paperclip icon at the bottom of figures 6 and 7 and finding the file. If a photo is dragged into the new message window it automatically displays the image instead of being an attachment.

Also, files can also be added from the integrated online storage called Google Drive. To add files from Google Drive, click the triangular shaped icon, which is the 5th from the left. This works the same as if the user clicked the paperclip icon. This, however, only shows the files in the user's Google Drive account. For attaching photos, users can click the photo icon instead of the paperclip. Doing it this way, users are given the option of the photo being inline, which displays the image inside the email body, or as an attachment, which is not displayed in the body.

Scheduling calendar events in Gmail

Appointments are easy to schedule from Gmail. As with everything else there are multiple ways to access the calendar. The simplest is to go to <https://calendar.google.com>. This will show the full calendar view shown below in figure 8. There is also a mini calendar view

built into the Gmail email page, shown below in figure 9. Calendar entries can be viewed or deleted, but not edited in this view. To go to the full calendar view from here, click the “Edit in Calendar” button after selecting an appointment, or click the arrow next to the trash can in the upper right corner of the screen.

By default, all day appointments show at the top of the day it is scheduled for. Holidays can be added automatically in the settings. The left side shows navigation options including a mini month calendar to jump to any day in the month or using the left and right arrows “<>” to move forward and backward a week at a time.

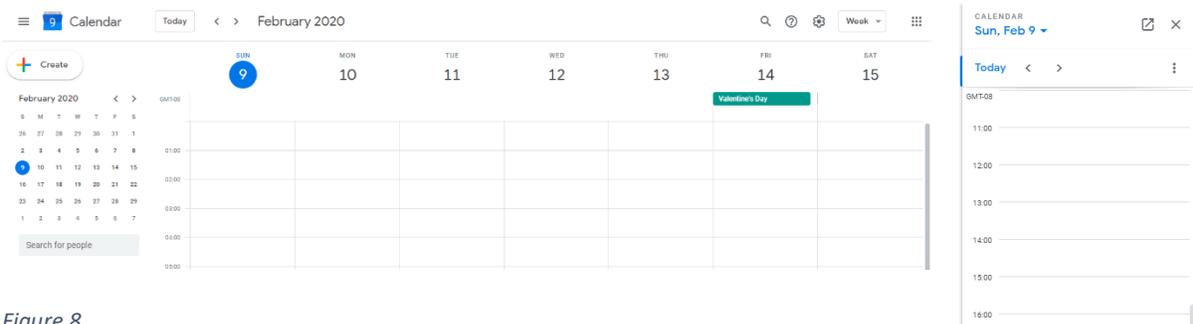


Figure 8

Figure 9

To create a new entry, first click the “+ Create” button in the upper left corner of figure 8 to be shown the new appointment screen, shown below in figure 10. From this screen, the entry can be named and scheduled. Other pertinent information can also be added such as location, notes, and other attendees. If no one needs to be invited, then the “guests” box can be left empty and it will only be on the calendar of the person who created it. If guests need to be added later, simply click on the entry on the calendar and any of these fields can be updated. Figure 11 below shows the quick view of an appointment that has already been created and shows the options for editing or deleting the entry. If details need to be changed, click the pencil icon shown in figure 11. From there, the user will be directed to a new page, shown in figure 12. This will show all the

fields that can be edited, including date, time, attendees, details, or whether it is a recurring appointment.

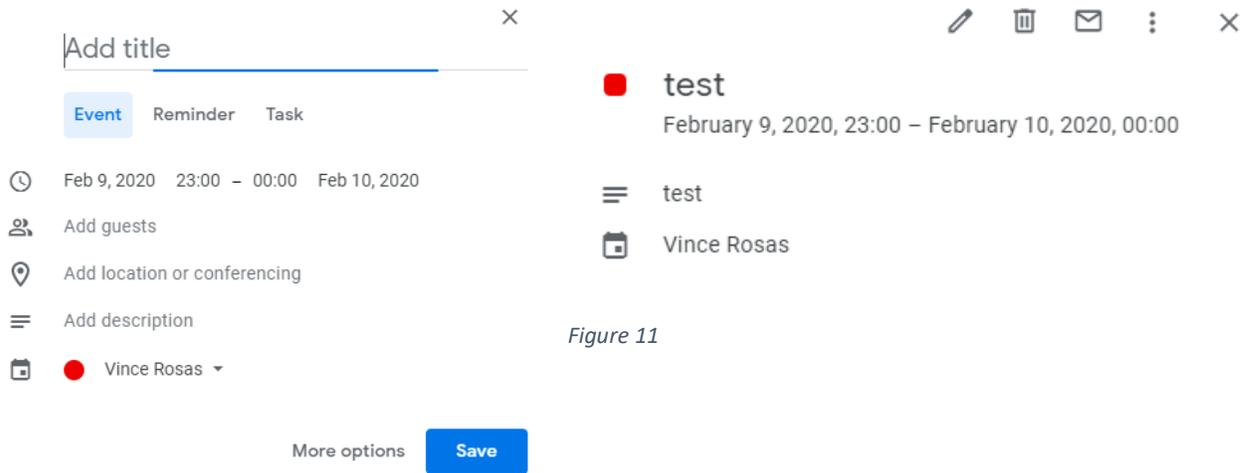


Figure 11

Figure 10

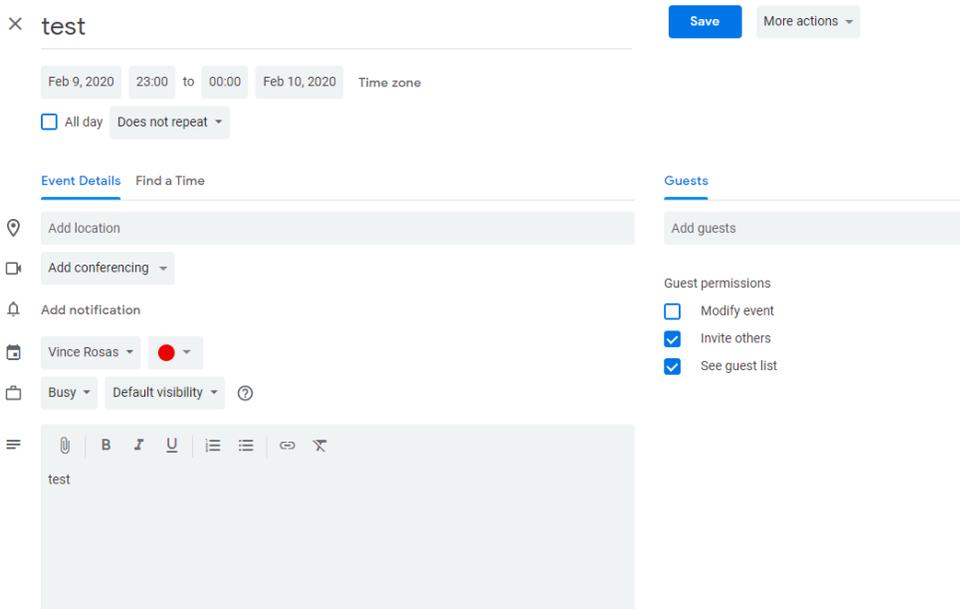


Figure 12

Purpose of this training

The purpose of this training is to show intermediate users how to perform additional tasks that may be necessary to complete their jobs. In addition to the skills learned in the basic user training, the intermediate training will include tasks such as uploading files to Google Drive, using the notes application called Google Keep, and how to manage tasks in the Google Tasks app.

Upon completion of the training, users should be able to perform all tasks in the basic user training as well as how to upload files to Drive, create notes in Keep, including with attachments, and how to create tasks in the Tasks app. Users should also be able to combine skills such as emailing files from Drive as attachments or sharing notes as attachments in emails. While this training is for intermediate users, any user is welcome to learn from it. This training is not meant to be comprehensive and may mention products or services from Google that aren't included in the training

How to upload files to Google Drive

To use Google Drive service, begin by logging into the website, <https://drive.google.com> and sign in with the same credentials used to access the company email. There is also a desktop sync application but that is optional. The desktop sync application allows accessing the Google Drive service like it is another folder on the computer. Even when using the website, the easiest way to think of Google Drive is as another folder

Once signed into the website, users will be presented with a screen like the one below (Fig. 1). As new users, there will not be anything on the page, this is just an example. To begin uploading files to the Drive service, there are multiple simple ways to do so. Firstly, find the file to be uploaded on the computer, then simply drag and drop the file into the browser to upload the file. This works for any file type, be it pictures, documents, audio, or video. It also works for folders as well. Secondly, the “+ New” in the upper left corner can be used to upload files or

folders. This is also where new folders can be created to keep uploads organized. The Google Docs service can also be accessed through this menu. Also, by right-clicking on the empty space in the center of the page, the context menu will appear. This menu is the same as clicking the “+ New” menu but may be faster to access. The Google Drive service also allows for simple sharing of files and folders with other users. The search bar at the top of the page is able to search file names and the contents of files to find the keywords entered and can be limited to specific file types as well.

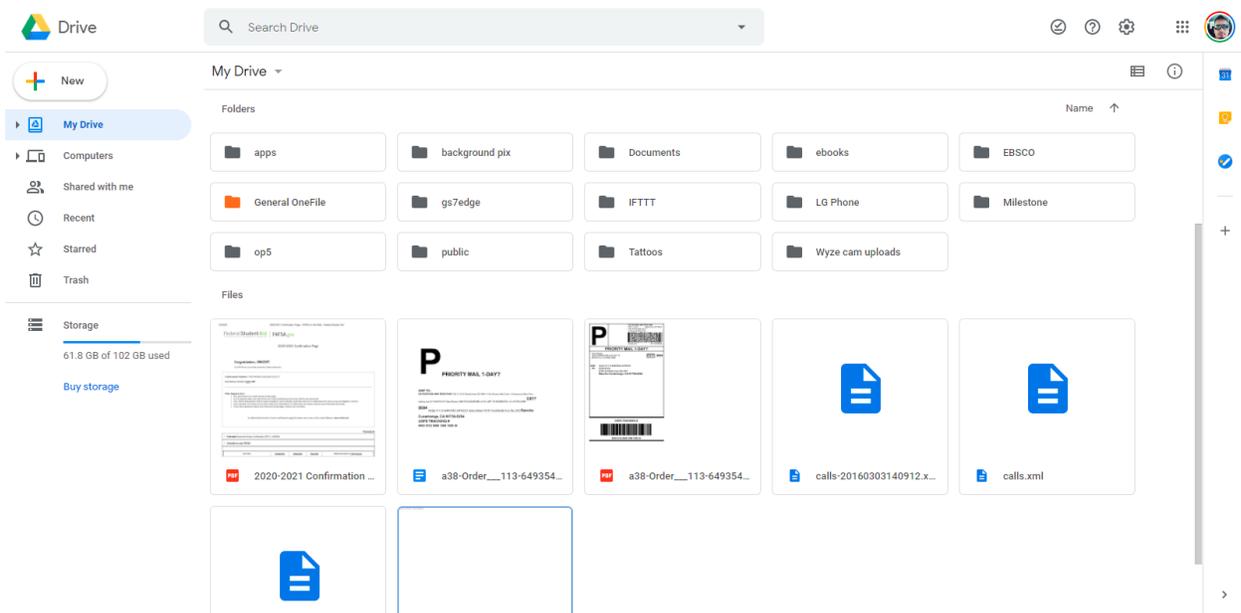


Figure 13

The Google Drive service can be used to upload files for safe keeping, archiving, sharing internally, or sending to others via email. Sharing internally, or via a clickable link are not covered in this training. Sharing via email sends the actual file and is the most common way to share files that are not overly large. To send a file via email, begin by going to <https://mail.google.com>. Sign in will be automatic since the user is already signed into the Google Drive service. Remember from the basic training the new email screen below (Fig. 2)

with the various option for attaching files. This time, the triangular shaped icon will be chosen instead of the paper clip. This will bring up a new window showing the contents of the users Google Drive account (Fig. 3). Simply select the file to be sent and click the blue “Insert” button.

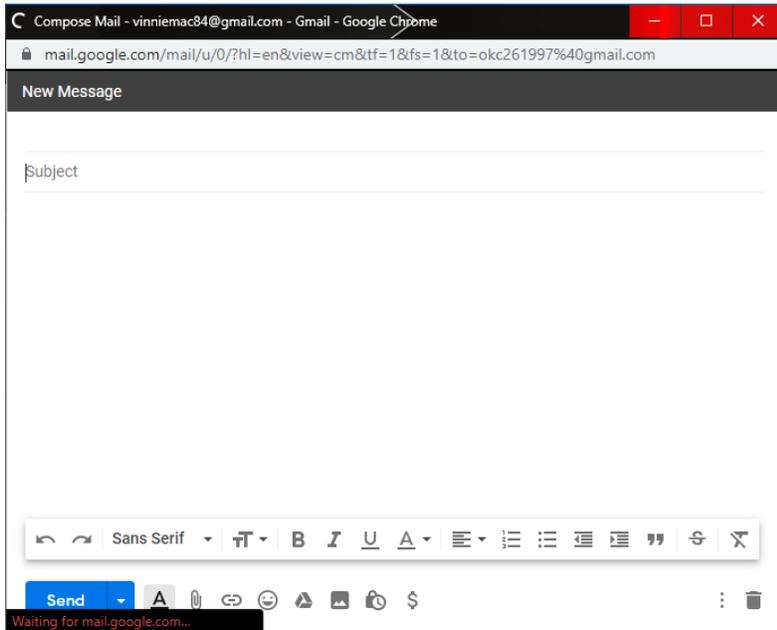


Figure 14

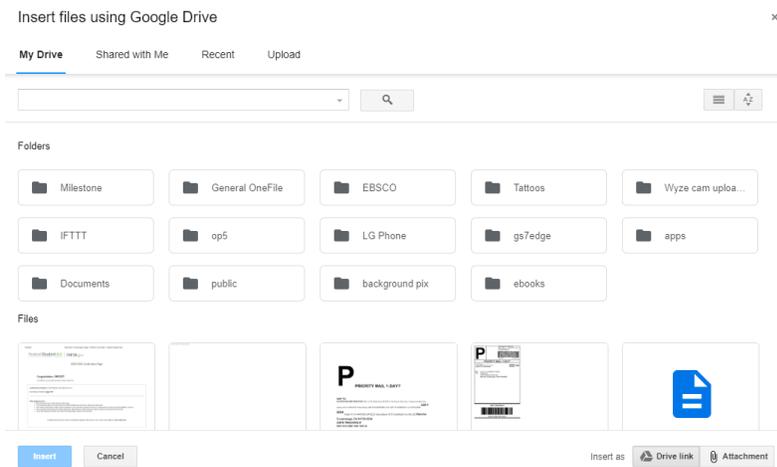


Figure 15

Notice in Fig. 3 the two buttons on the bottom right corner. These are important. The first option, “Drive link” will only insert a link to the file that the receiver will need to click to be able

to download from the company's Google Drive account. This may not work as sometimes links are removed from emails from external senders or the receivers firewall may prevent accessing file sharing sites. Unless working with large files, the best way is to click the second button "Attachment" so the actual file is sent. This may cause the email to go into a receiver's spam folder or be temporarily blocked but should still be delivered.

Once the file or files are attached, simply continue composing the email as normal, add any additional receivers, and click send. The file will be attached and sent to all users. Gmail lets users attach many types of files to emails, not just documents. One such additional file are notes from Googles Keep app.

How to create notes in Google Keep

To begin using Google Keep on the desktop, begin by signing into the Google Keep website at <https://keep.google.com>. Again, if already signed into the company Gmail account, users will be signed into Google Keep automatically, see Fig 4 below.

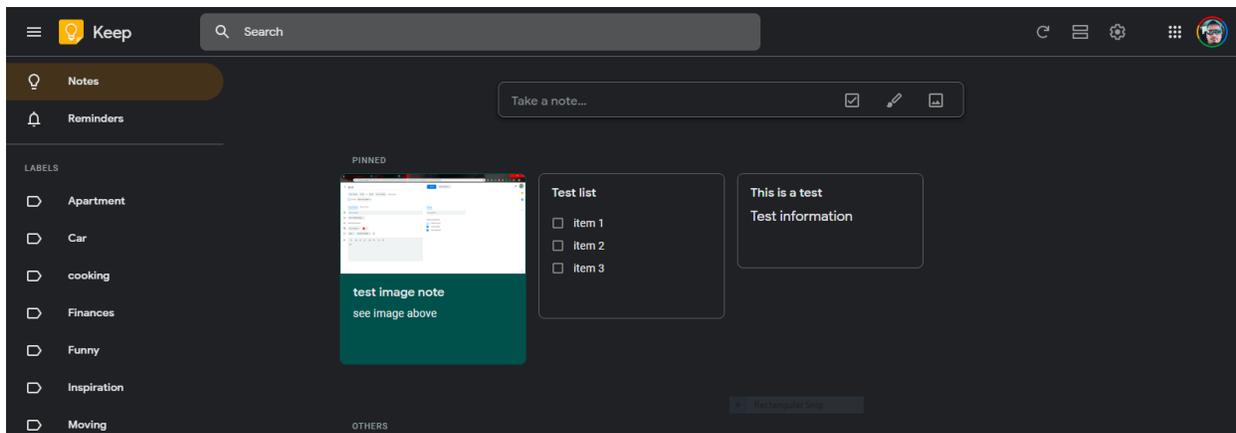


Figure 16

Some example notes are included in Fig. 4 above to show a basic list of what can be attached. The typical text only notes can be created, item lists can be created, even image notes

can be created. For image-based notes, they can be created using picture files on stored on the computer, or drawings using a touch screen computer or by using a mouse. Notes can be categorized by creating labels. Multiple labels can be attached to the same note to make sorting and organization easier. Notes can be created quickly and easily by using the toolbar at the top of the page. This allows for quick creation of basic text notes, checklists, image notes, or drawing notes. Users simply need to click on the icon for the type they want to create and begin. Notes can be shared different ways. To be shared internally, click the “Add collaborator” button and add any users who will be able to view and edit the note. To email, open a note (Fig. 5) click “Copy to Google Docs”, make any additional changes if any, then, using the file menu in Google Docs, click “Email as attachment”. Users will be presented with Fig. 6 below. This gives users the option to choose what type of file to send the note as. As shown, there are many options.

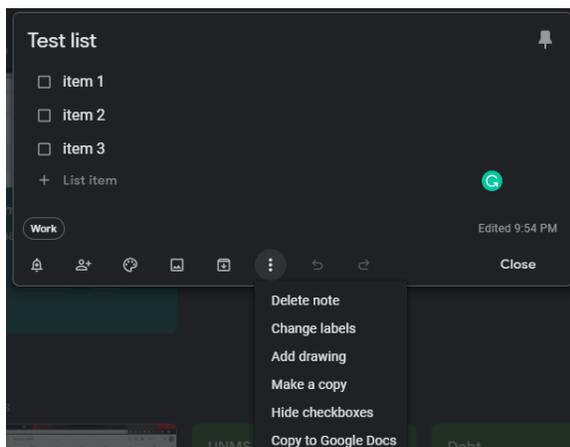


Figure 17

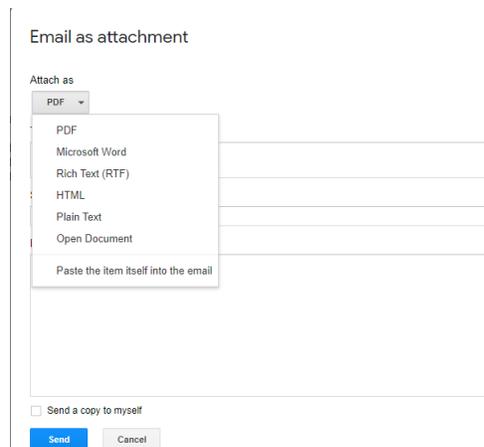


Figure 18

How to create tasks in Google Tasks

Tasks can be thought of as notes with due dates. Google Tasks doesn't have a dedicated website like Mail, Calendar, Keep, and the others, but it is accessible quickly and easily through Mail, Calendar, and Drive. There is a small icon on the right side of each of those pages, a blue circle with a check (Fig. 7). This will open the side bar and allow users to view and edit their

tasks as well as create new ones (Fig. 8). Once a task is created, it can be edited by clicking the pencil icon that appears next to each note. Figure 9 below shows the editing window. This gives users the ability to add more details, add a due date, and add additional tasks to the main task. The task can have multiple subtasks, but the subtasks themselves can't have additional subtasks but they can have additional details and due dates. If multiple task lists have been created, then this screen also gives the ability to move a task from one list to another.

Tasks can only be marked completed from the main screen, but subtasks can be marked as completed from the main screen or the editing screen. By clicking on the edit icon for a subtask, additional details can be added to the subtask. Due dates for specific subtasks can be added here as well (Fig. 10).

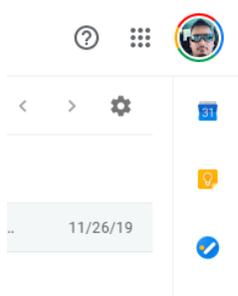


Figure 19

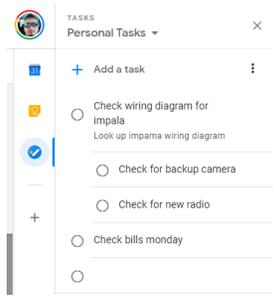


Figure 20

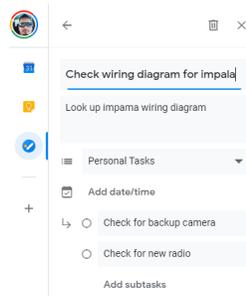


Figure 21

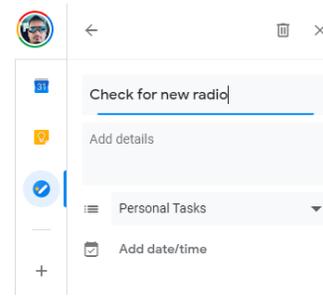


Figure 22

Disclaimers

For internal use only. This training document is not to be considered as a comprehensive training on all Google products included in the Gmail subscription, it is solely to be used as a guide to accomplish the basic tasks necessary for employees to complete their day to day job requirements. XYZ company is providing this training solely to assist in the transition from

Outlook to Gmail. This document does not supersede any previously published security guidelines pertaining to the distribution of company information. Any questions pertaining to the security of the Gmail products or services should be directed to the appropriate IT personnel. XYZ company will not be held liable for any misuse of company systems, the Gmail service, other products and services included in the Gmail services, or this manual. Any misuse of the training material, Google products or services, or XYZ company resources are the sole responsibility of the user committing the inappropriate acts. Misuse of the manual, Google products or services, or XYZ company resources can result in disciplinary action up to and including termination from the company.

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