

Setup Guide

For Google G Suite

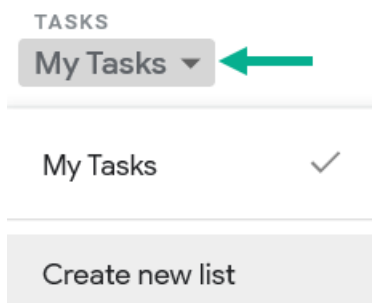
Tasks

Creating Lists in Google Tasks

1. Open Gmail.
2. Click the Tasks icon to open the Tasks window in the right panel. You'll find this on the right side of the Gmail window, next to the Settings icon.



3. Click on the drop-down arrow below TASKS and choose Create new list. (Yours may say My Tasks or a different list name. That's fine.)



4. Add new lists, one at a time, by repeating step 3. Here are the lists we suggest:

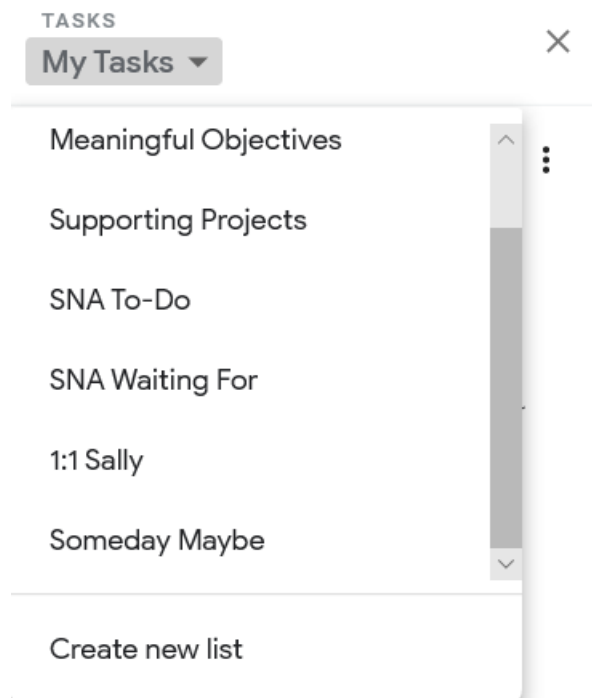
Meaningful Objectives
Supporting Projects

SNA To-Do
SNA Waiting For

1:1 [Meetings/Person]
Someday Maybe

You will likely have several 1:1 lists, for people or teams you meet with regularly. Add them as separate lists (e.g. 1:1 Bob, 1:1 Marketing Team, 1:1 Jenna, etc.)

5. When all your lists are set up, they will appear like this in Tasks:



Note:

Lists are sorted in the order they were entered (not alphabetically). The only way to change the order would be to delete the lists and enter them again, in the exact order you wish.

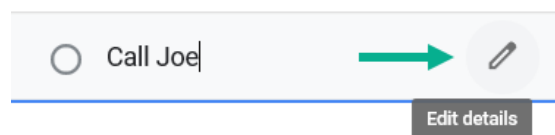
Cleaning Up Old Task Lists

If you have any lists you no longer need or want to merge with your new lists, here are your options:

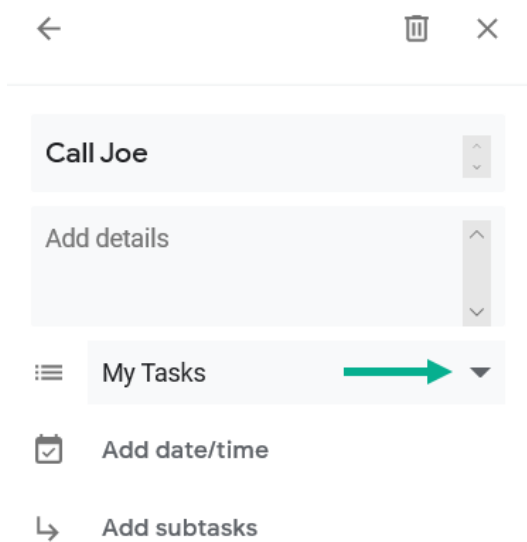
- Move the tasks to your new lists and then delete the list
- Delete the list (which will also delete all tasks within the deleted list)

To move a task to a new list:

Click on the edit icon to the right of the task description

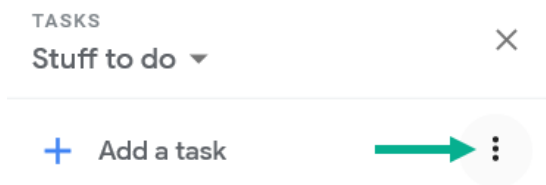


Click on the drop-down arrow next to the current task list it is assigned to and choose a new list from the menu.

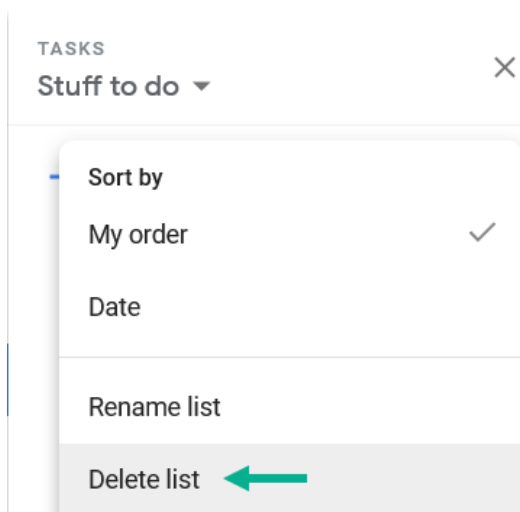


To delete a list:

Go to the list and click on the More icon (3 dots):

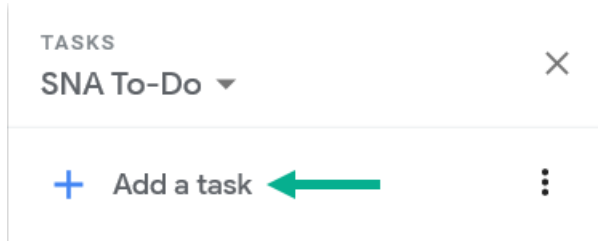


Select Delete list from the drop-down menu:

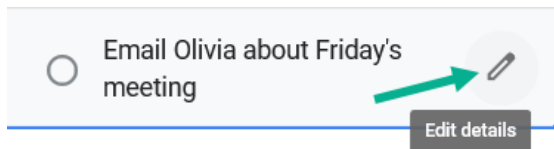


Adding Tasks

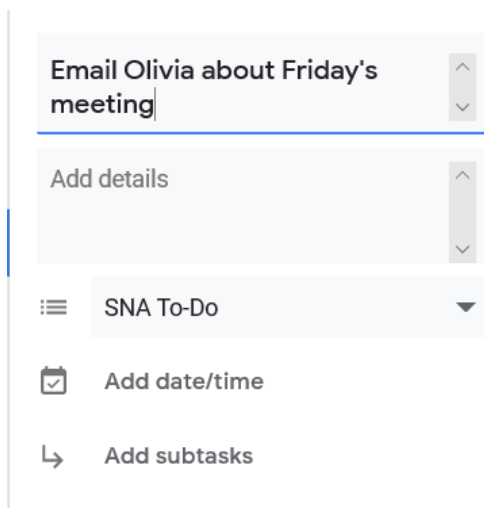
To add a new task, click the Add a task button in the list you want the task assigned.



To add additional details to the task, click the Details button to the right of the task description:



In this window you can add additional details, assign a date and time, and add subtasks.

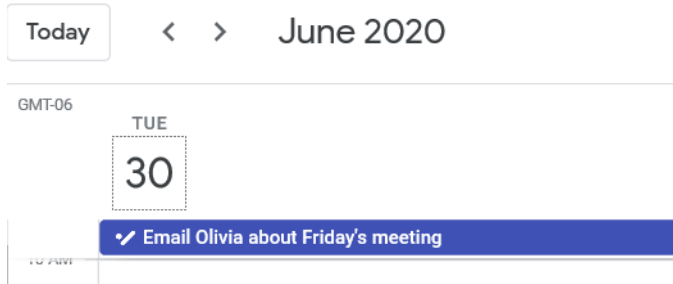


Click the left arrow key at the top of the task window to save and return to your list view.

Notes:

- The details field only accepts text, not file attachments. If you want to attach a file, paste in the URL if it's stored in the Cloud.

- Adding a date and time will add the task to your Google calendar as well:



Completed Tasks

To mark a task complete, simply click the circle to the left of the task.

To unmark a task complete, uncheck the circle.

Completed tasks appear at the bottom of the list where they were originally stored.

Completed (1)

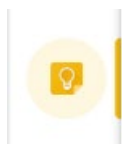


- ~~Email Olivia about Friday's meeting~~
--does she want to meet on Zoom? -
-Agenda?

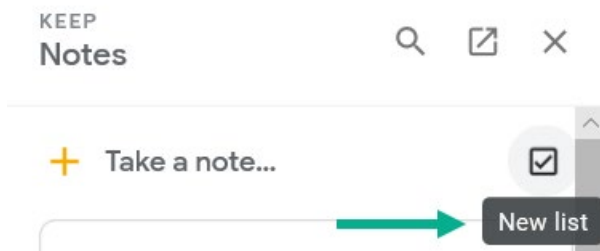
Using Google Keep

Another option for managing your task lists, instead of Google Tasks, is Google Keep. The advantage of Google Keep is that you have more options for formatting, add labels, add collaborators, and can view your lists in a much larger window (<https://keep.google.com>). The disadvantage is you cannot currently turn an email into an item on a Keep list, like you can with Google Tasks. It will come down to personal preference.

You'll find an icon for Keep to the right of your Gmail inbox:



You can setup Google Keep lists from within Gmail:



Or by opening Keep in a new tab, for a larger view:



You would create the same 6 lists as recommended on page 1.

Or, you may find Google Keep useful for reference and keep project and action lists in Google Tasks. Experiment to see which one works best for you.

Synching Tasks

Tasks sync seamlessly to the Google Tasks app. Keep note sync to the Google Keep app. Both are available for Android and iPhone.

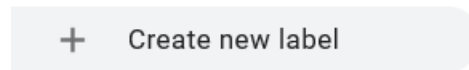
Email

Creating Labels

Gmail works differently than most email programs in that you don't create email folders. Instead, you create Labels and assign emails to those Labels to move the item out of your inbox.

To create a Label:

Scroll below your Inbox to Create new label



Enter name and click Create

New label ×

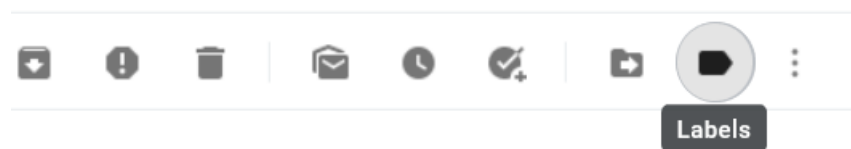
Please enter a new label name:

Nest label under:

Cancel Create

To assign an email to a Label:

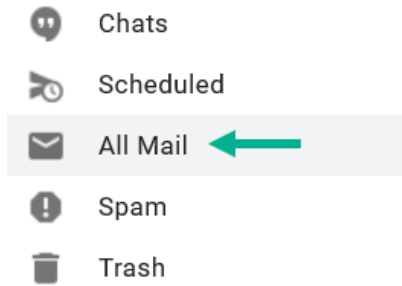
Open the email and click on the Labels icon in the menu at the top of the email and select your Label from the drop-down options and click Apply:



Next, click Archive to move the email out of the Inbox.

Instead of assigning a Label, you can instead drag it to a Label in your left navigation menu by clicking on the email from your inbox view, holding down your mouse, and dragging it to the new Label. This will automatically remove the Inbox label.

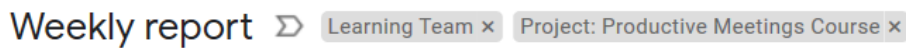
You also simply Archive an email without adding a Label. Archiving will move the email to All Mail.



Notes:

All emails in the inbox are automatically labelled with Inbox Label. So simply adding a new Label won't move it out of the inbox. Archiving or dragging the email to a new Label is required to move it out of the Inbox.

The power of Labels is that you can assign multiple labels to the same email. For example, assigning it to a specific project and department it relates to:

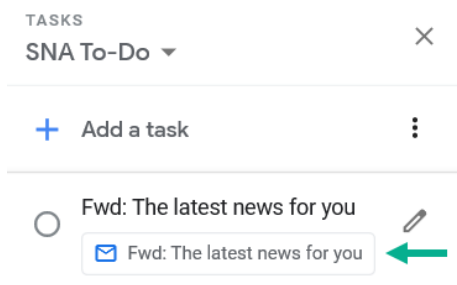


Creating Tasks from Emails

To create a task from an email, click on the Add to tasks icon at the top of the open email:



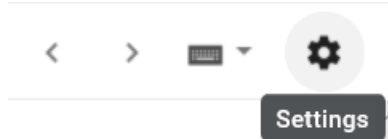
A link to the email is automatically added to the most recent Task list you viewed. A link to the email is added to the Task. The email stays in your inbox until you Label or Archive it.



Clicking on the email in the task will open the email.

Turning Off Notifications

To turn off email notifications, for greater focus, click on the icon in the top-right corner of Gmail and choose Settings from the menu:



Scroll to mail notifications and set to off.

Desktop notifications:

(allows Gmail to display popup notifications on your desktop when new email messages arrive)

[Learn more](#)

[Click here to enable desktop notifications for Gmail.](#)

- New mail notifications on** - Notify me when any new message arrives in my inbox or primary tab
- Important mail notifications on** - Notify me only when an important message arrives in my inbox
- Mail notifications off** ←

Shortcuts

To see a full list of keyboard shortcuts, type ? anywhere in Gmail. If keyboard shortcuts are working for you, be sure they are enabled in Settings.