CHA Admin Toolkit

As a CHA Administrative Assistant you will need additional functionality to perform your job tasks. The Administrative Assistant Toolkit will walk you through setting up both your account and your Executive's/Manager's Gmail and Calendar accounts in order to best perform your daily responsibilities.

Look for this logo to locate SADA-recommended best practices:

Tip - Click a list item below to directly skip to that toolkit topic

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Executive's/Manager's Actions

Granting Access to Gmail (Delegating Access)

(This should be your first step as it grants you the ability to work within the Executive's email account.)

Note: While this access can always be removed or changed later, it does give visibility of all messages to you, the Assistant. Also, keep in mind that changing most settings (label names, colors, filters, etc) will also change them for the Executive.

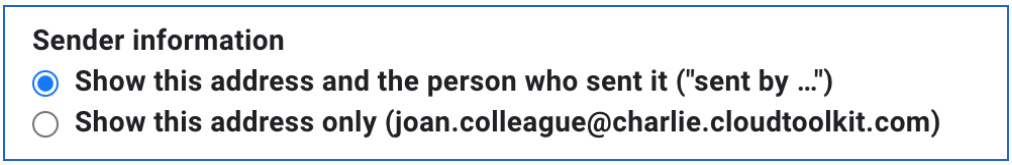
Mobile Access: You can only access your own Gmail account via the Gmail mobile app. Your Executive's delegated account requires non-mobile access.

Configuring the Executive's Gmail settings

1. Log into the Executive's Gmail Account
2. From the Executive's Gmail click on the **Settings icon** in the upper right corner
3. Click **See all settings**
4. Select the **Accounts** option at the top
5. Go to **Grant access to your account**
6. Click **Add Another Account**, then enter the email address for whom access is being granted in the Email address field
7. Click **Next Step**
8. Select **Send email to grant access**
    a. The listed email address will receive a confirmation email that will need to be accepted → Upon acceptance, access is Granted

The account owner will have the option to select if opened messages will appear read for everyone who has access to the account.

The account owner will also have the option to select how sender information appears (Note: This setting applies to all sent messages and cannot be applied to specific recipients or messages).



Enabling 'Send Mail As' Executive

(Allows an email to be sent as the Executive from the Assistant's Gmail - no "Sent by" designation)

1. Log into the Assistant's Gmail Account and click the **Settings** icon
2. Click on **See all settings**
3. Select **Accounts**
4. Under **Send mail as**:
    a. Click **Add another email address**
    b. In the **Name** box, replace your name with the Executive's name
    c. In the **Email address** box, enter the Executive's email address
    d. **Uncheck** the **Treat as an alias** box
5. If replies are to go to your own email account (instead of the Executive's)
    a. Click **Specify a different "reply-to" address**
6. Click **Send Verification**
    a. Your Executive will receive an email and must click the verification link to complete the process
    b. If you already have access to the Executive's mail, you will be able to accept the verification yourself from the Executive's inbox

Once completed, follow the steps to Send Mail as Executive.

Granting Access/Subscribing to Calendar

(This should be your first step as it grants you the ability to manage the Executive's Calendar.) Gmail access and Google Calendar access are independent of each other and must be granted separately.

Note: Delegated calendars CAN be accessed in the mobile app, unlike delegated Gmail accounts.

1. Log into the Executive's Calendar and click **Settings**
2. In the left panel locate **Settings for my calendars**
3. Click on the Executive's calendar
4. Under **Share with specific people** click **Add people** to add the Assistant's email address

a. **Permission options**
   There are two recommended options for EAs:
   i. Make Changes - View and change events (this includes visibility to events marked as private)
   ii. Make Changes and Manage Sharing - Add, delete, and edit events, as well as invite others to the calendar

Once completed, use the My Calendars section to enable (by ticking the checkbox) and work within the Executive calendar.

Granting Access to Contacts

(This should be your first step as it allows you to manage the Executive's Contacts list - i.e. address book)

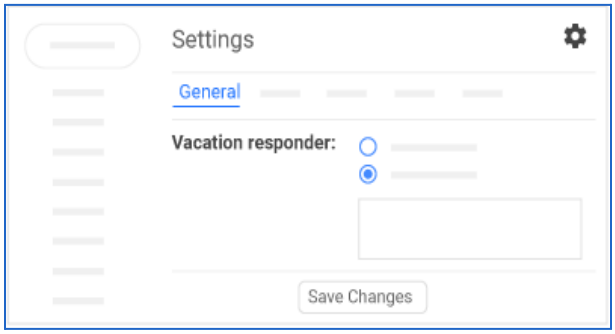
1. Log into the Executive's Contacts and click **Settings**
2. Click **Delegate Access**
3. Click **Invite Delegate**
4. Enter and select your name to delegate access

Gmail

Vacation Responder (Out of Office) and Undo Send

Vacation Responder (Out of Office)

- From within your Gmail select **Settings** (located in the upper right corner)
- Under the **General** tab scroll down to **Vacation responder**
  - Select **Vacation responder on** to enable it
  - Complete the open fields (First Day, Last Day, Subject & Message)
    - **Last day** is optional as Gmail will remind you from the inbox that your Vacation Responder is on



  - Check either or both of the following boxes (if desired):
    - **Only send a response to people in your Contacts** - Select if you wish to ONLY send responses to people in your personal Contacts

- **Only send a response to people in CHA** - Select if you wish to ONLY send responses to people within CHA
  - Check neither box if you wish for **ANYONE** sending you an email to receive this response

Undo Send

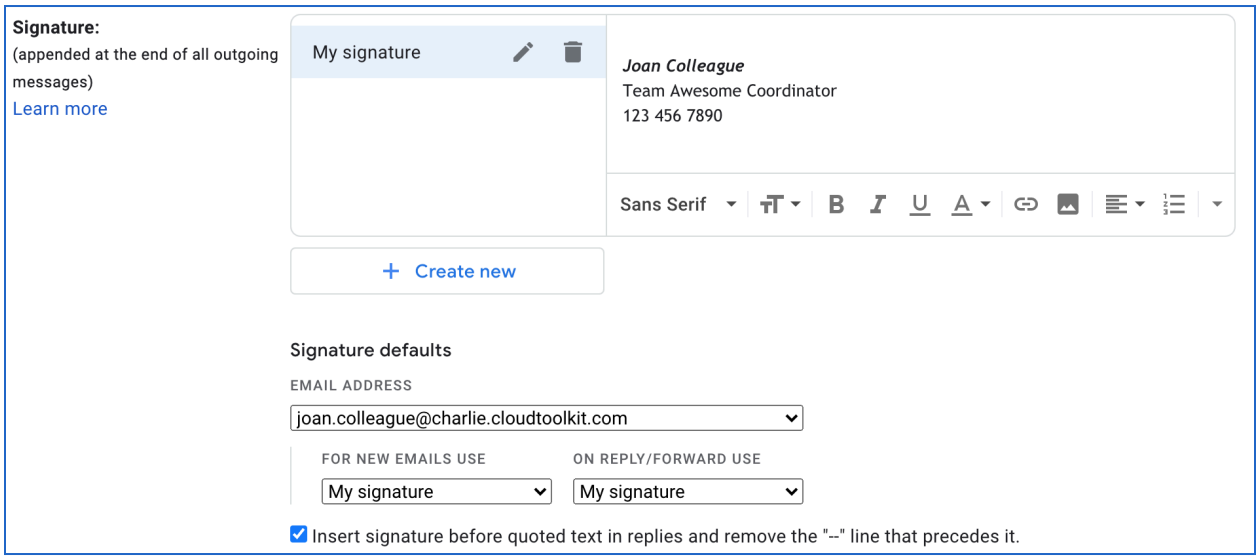
This feature is essentially a grace period between when you click Send and when the message actually gets sent. This is not a message recall feature.

1. In Gmail, select **Settings** (located in the upper right corner)
2. Under the **General** tab scroll down to **Undo Send**
3. You are able to set your cancellation period to a maximum of 30 seconds (5 secs is the default)

Creating Signatures

1. From within your Gmail select **Settings** (located in the upper right corner)
2. Under the **General** tab scroll down to **Signature**
3. Copy and Paste your existing signature into the signature textbox, or select **+ Create new** to create a new signature
   a. If you wish to use a graphic, use the **Insert image** icon in the toolbar below the signature box or copy and paste your graphic into the box.
   *Tip - To recreate your signature seamlessly, copy and paste your [Legacy] signature into a Google Doc. From the Google Doc, copy and paste into the signature box.
4. Use the **Signature defaults** section to apply your signature of choice to New and/or Reply/Forward emails
5. Check the box that says “Insert signature before quoted text in replies and remove the "--" line that precedes it.”

6. Click **Save Changes**



Managing Multiple Signatures

1. From within your Gmail click **Settings**
2. Under the **General** tab scroll down to **Signature**
3. Refer to steps 4 and 5 in the previous **Create Signature** section above to choose your default signature for new emails and/or replies and forwards
4. Once created, you can select a signature other than your default from within the message compose window using the icon.

Revoking Access to Your Gmail

1. From within Mail click **Settings**
2. **Accounts** tab
3. Go to **Grant access to your Account**
4. Select **delete to** the far right of the email account whose access needs to be removed

Send on behalf of...

Sends the message on behalf of your Executive as opposed to sending (and appearing) as your Executive.

Send mail on Executive's behalf

(Allows you to send email as your Executive - with a 'Sent by')

1. Log into your Gmail Account
2. Click your **Google Account profile photo** in the upper right corner

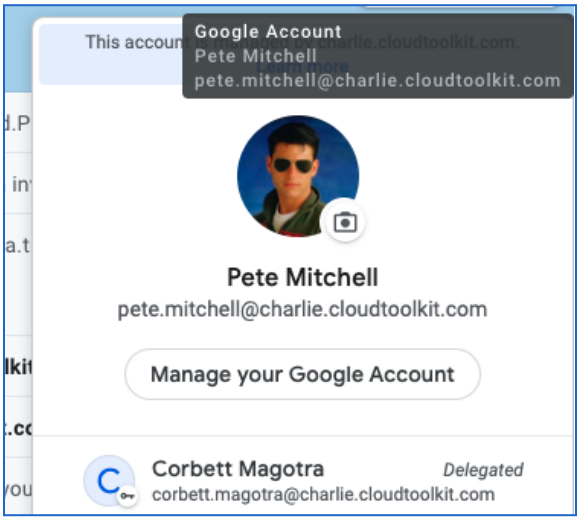
3. Select your **Executive's email address**
4. Upon clicking, you will be directed to the selected email account
    a. The Executive's account will open in a different tab or browser depending on your setup
5. You can now send emails on behalf of your Executive
6. Messages will appear to come from your Executive's account. Recipients will see messages as sent on your Executive's behalf by you with 'Sent by' referenced before your name.

Send mail as Executive

(Allows you to send the email as your Executive - with no Sent by)

Note: follow set-up instructions here first.

1. Log into your Gmail account
2. Click on your **Google Account profile photo** in the top right corner
3. You will now see all of the accounts you have been delegated underneath of your account



4. Select the account from which you want to send email
5. A new Gmail tab will open for the selected account
6. Click **Compose**
7. Notice while composing an email, the **From** field now has a dropdown

8. You can now send an email '**As**' your Executive without **the Sent by** in the received email
    a. No Signature (unless manually added)
    b. Manage how your replies will be treated using the '**Send Mail As**' option under **Settings > Accounts**

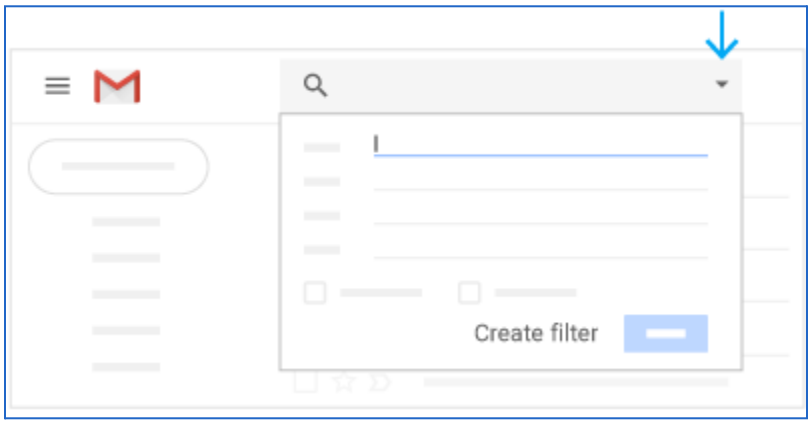
Note: Messages sent as your Executive do not appear in their Sent mail. To give them visibility, consider adding them under the BCC field when composing the message.

Creating Filters

Filters are equivalent to the Rules feature in other email platforms. They give you the ability to apply actions on messages that fit the search criteria you set.

Filter email from the Search bar

1. In the Gmail search box, click the **down arrow** ▾
2. Enter your search criteria, then click **Create filter**
3. Check the **Apply the label** box or any other actions you want to add to your filter
    a. (Optional) Check **Also apply filter to X matching conversations** to apply your filter to existing/matching conversations in your Gmail
4. Click **Create Filter**



Filter email from an existing email

1. Go to your Gmail inbox
2. Select the checkbox next to the email you want to filter
3. Click **More** on the above toolbar
4. Click **Filter messages like these**
5. Modify your search criteria, then click **Create filter**
6. Check the **Apply the label** box or any other actions you want to perform
    a. (Optional) Check the last box **Also apply filter to X matching conversations** to apply your filter to existing/matching conversations
7. Click **Create Filter**
    a. This feature will filter all messages similar to the selected email

*Note: You can always modify or delete filters by clicking on the **Settings** icon in the top right corner of the screen, next click **See all settings**, and then select the **Filters and Blocked Addresses** tab. From there you can use Ctrl-F (Cmd-F on a Mac) to find and modify the desired filter.*

Distinguishing Between Accounts

By default, your mailbox will look similar to your Executive's mailbox. In order to prevent confusion, and add some flare in the process, consider choosing a theme, by following these steps:

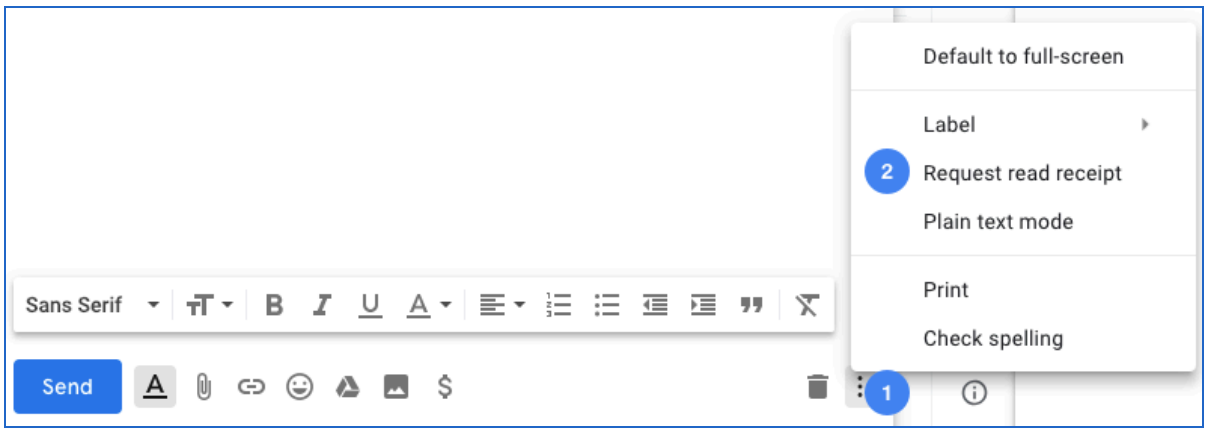
Change your theme

1. Go to your Gmail inbox
2. Click the **Settings** icon in the top right corner of your window
3. Click **View all** in the *Theme* section of the quick settings
4. Choose a theme that fits your preference
5. Make adjustments such as **blur** , or **vignette**, at the bottom of the theme window
6. Click the blue save button to apply your theme

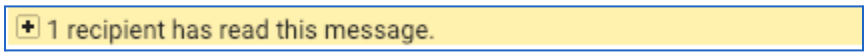
Note: You can only apply a theme to your own mailbox, not your executive's mailbox

Requesting a Return Receipt

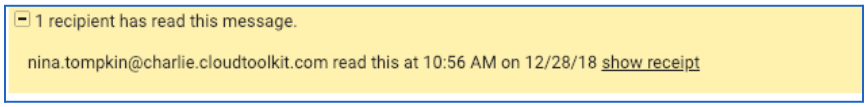
1. While composing an email click the **More options** (three vertical dots) options icon
2. Click on **Request read receipt**



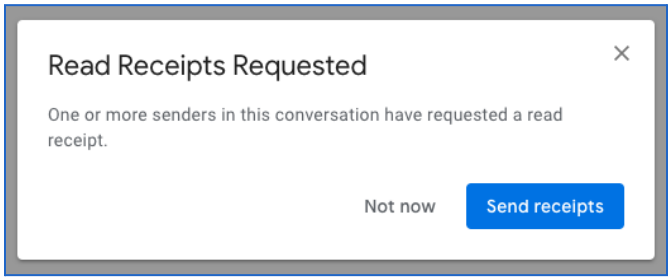
3. You will receive an email that will inform you who has read the message



You can drill into the message to see more detailed information.



The recipient will receive a pop-up that informs them you are requesting a Return Receipt. They have the option to select **Send receipts** or **Not now**.

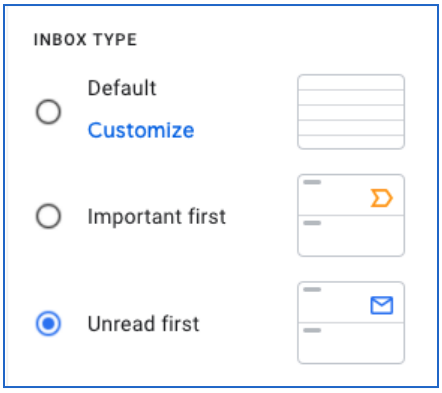


Note: You cannot force a read receipt to be sent. The recipient has to allow it to be sent.

Show Unread Messages First

1. In Gmail, go to **Settings** by clicking on the gear icon
2. In the *Quick settings* panel, click the **Unread first** box in the Inbox type section

a. This option will show all unread messages first, followed by 'Everything else'

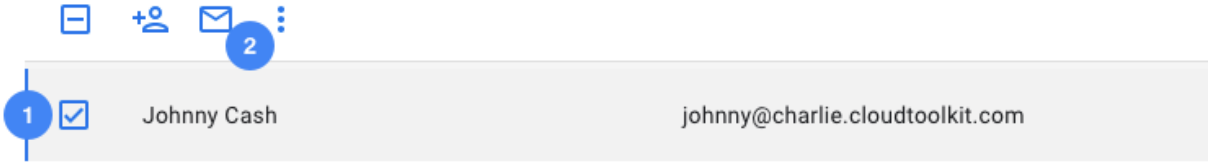


Finding and Using the Directory

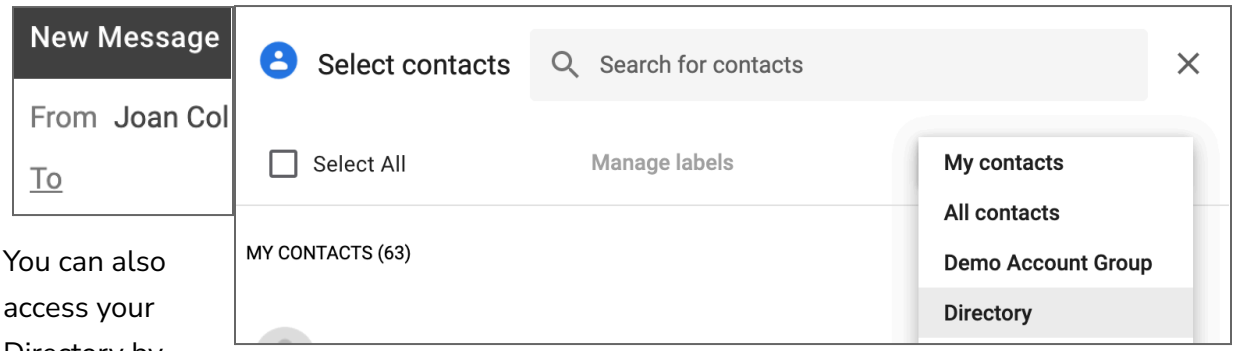
To find/use the Directory

1. Access **Google Contacts**
   a. From any Google tool click on the **Google apps** icon in the top right corner
   b. Select **Contacts**
2. On the left side panel locate and click **Directory**
3. Scroll down to see all of the users in your Directory
4. You can use the **Search** field to look for specific users

5. To email someone from Contacts
   a. **Check the box** for each contact you want to email
   b. Click the **Send email** icon on the toolbar above



6. A message draft will open in a new tab with the selected user(s) in the To: field

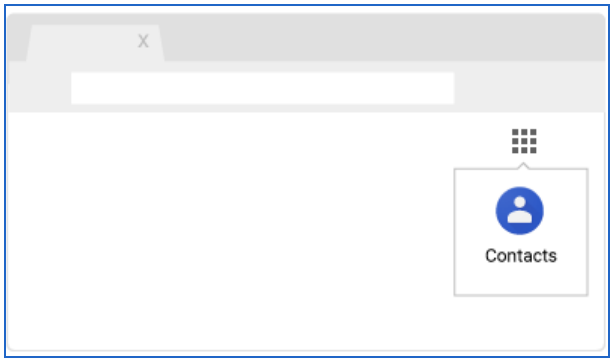


7. You can also access your Directory by clicking “To” in the compose window

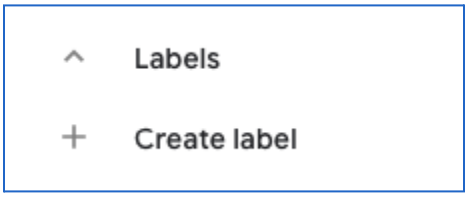
Creating a Contact Label

Contact Labels are essentially personal distribution lists. Once created, they can be used in the same way as an individual Contact in other Google applications, but will populate all of the included members of the Label (e.g., add multiple recipients to an email using a Contact Label in the To: field instead of entering them individually).

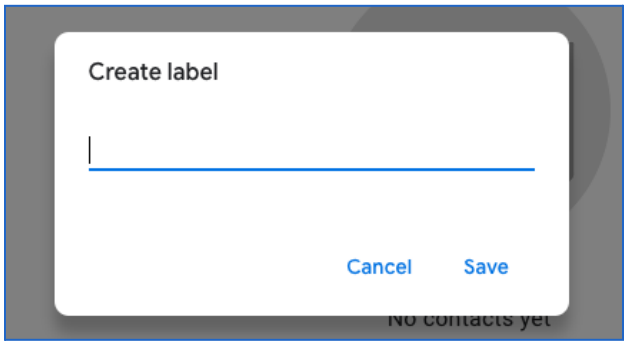
1. Access Google Contacts
    a. From any Google tool click on the **Google apps** icon in the top right corner
    b. Select **Contacts**



2. In Contacts, locate the **Labels** section in the left panel and click **+ Create label** (Labels are your personal distribution lists)

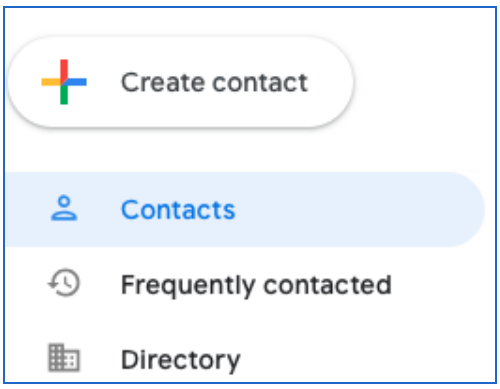


3. Enter in a name for your Label and click **Save**

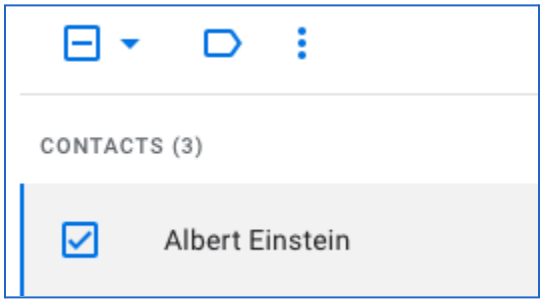


Label Contacts

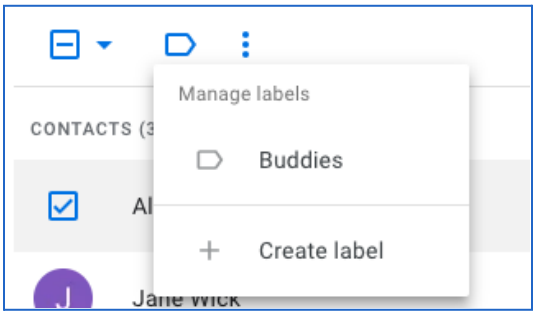
1. Access your Contacts list



2. Select the contacts to label



3. In the toolbar above your Contacts, click the **Manage Labels** icon



Google Calendar

Calendar Delegation

Assistant's action

1. Navigate to calendar.google.com
2. Under **My calendars** (on the left sidebar)
    a. You should see your Executive's name in the list of calendars you can view and/or modify (if not, ensure you have been granted access from your Executive's account)
3. When checked it will display their Calendar entries on your calendar

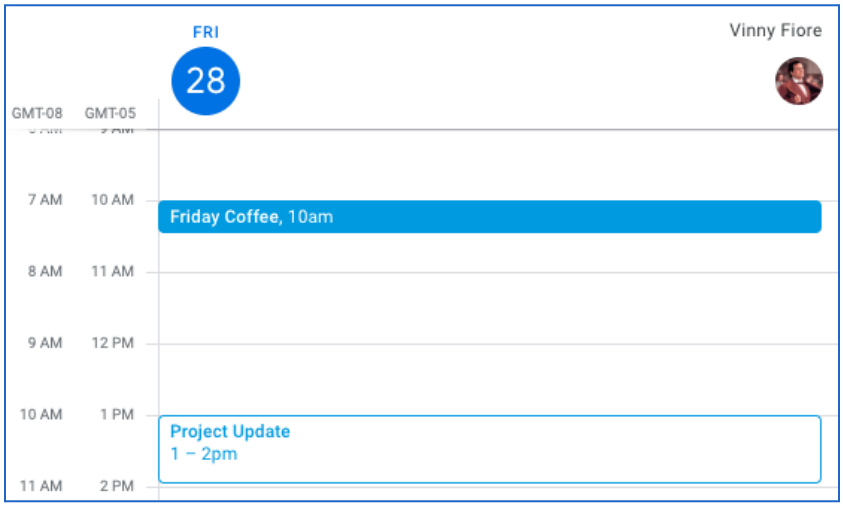
** Tips:

1. Select the three vertical dots next to your Executive's name to change their calendar color in your Google Calendar
2. To view calendars in a side-by-side view, change your calendar view (located to the left of Settings) to *Day*.
3. You can also view your Executive's calendar within Gmail by clicking on the Calendar add-on in the right sidebar, click the icon, choose **Select calendars**, then select your Executive's calendar from the list
4. The Executive's calendar will also be available in the Google Calendar mobile app by selecting the menu in the top left corner

Adding Time Zones and World Clock

Adding Time Zones

1. From within your Calendar click **Settings**
2. Scroll to **Time zone**
3. Check **Display secondary time zone**
4. Select your **Secondary time zone**
   The Secondary time zone will appear next to your Primary time zone.



Adding the World Clock

1. From within your Calendar click **Settings**
2. Scroll to **World clock**
3. Check **Show world clock**

4. Add your desired time zone(s). The World Clock will now appear under your Calendar **Tip: While creating a Calendar event the World Clock will update to show you what time it will be in those time zones.

Specify Hours of Operation (Working Hours)

Enable working hours to let people know what times you are working and when you are available for meetings. This feature will warn people if they try to invite you to a meeting outside of these preset hours.

1. From within your Calendar click **Settings**
2. Scroll down to **Working Hours**
3. Make sure **Enable working hours** is checked
4. Modify the Days/Hours as needed

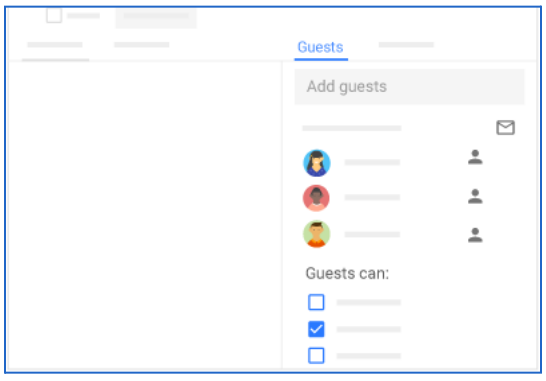
Creating Events

Inviting Guests to a Meeting

In Google Calendar, you no longer invite or add Guests by forwarding them a meeting invitation. Instead, you simply add them to the event as an additional Guest.

1. Double-click your Calendar event
2. Locate the **Guests** tab
3. In the **Guests** tab, go to **Add guests** and enter the guest's name or email address. Matching names and addresses in your organization's directory appear as you enter text.

4. After Guests have been added and the meeting description is complete, click **Save**



Note: Below the list of added guests, as the Organizer you can control the permissions granted to your guests in the **Guest permissions** *section. Here you can check the boxes to allow them to see the entire guest list, add additional guests, or give them full access to modify all details of the event.*

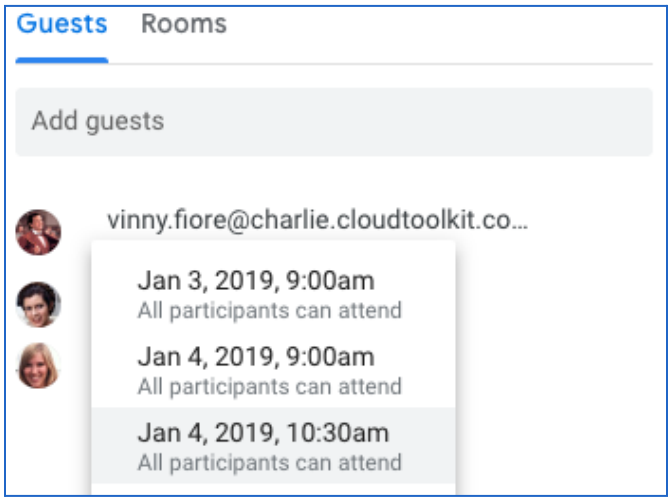
Marking Guests as Required or Optional

1. Hover over a guest's name to view the following options:
    a. = Required (Default) icon shows the guest is required
    b. = Optional icon shows the guest is optional
2. Click the icon to toggle between Required/Optional

Suggested Times

Google saves time when scheduling a meeting by showing suggested times and displays the first available time for all participants to attend.

1. While creating/editing your Calendar event, enter at least one name in the **Add guests** field
2. After all guests have been added, click **Suggested Times** under the attendee list
3. A dropdown list will appear with the available times for ALL guests listed
   ***Note**: Best Practice is for all users to configure their working hours in order for suggested times to not show times that are outside of those working hours.*



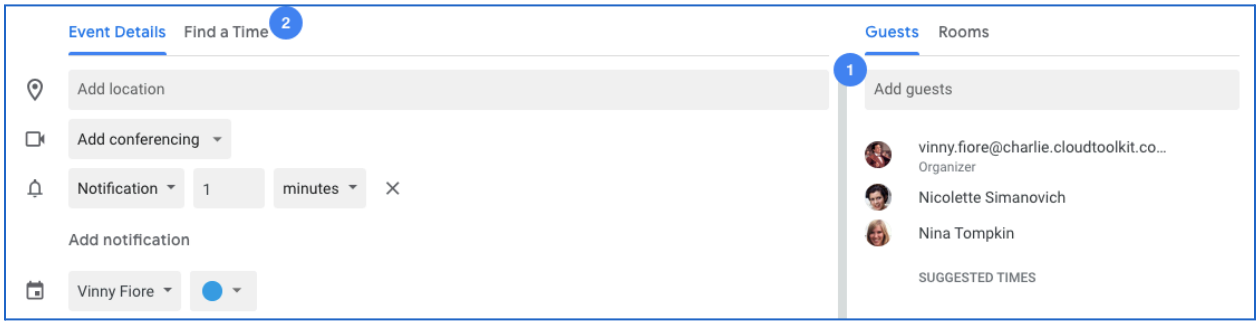
Find a Time

Find a Time allows you to view all guest's schedules at one time, side-by-side.

1. While creating/editing your Calendar event, add guests
    a. = Required (Default) icon shows the guest as required

b. = Optional icon shows the guest is optional - Default needs to be clicked to toggle)

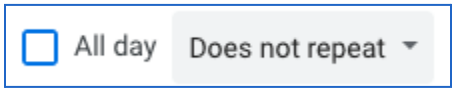
2. Select **Find a Time**



3. You can show *All guests* or only the *Required guests*' time
    a. Display options: All guests - Required guests (default) - No guests
4. Toggle between views of availability
    a. Options: Day - Week

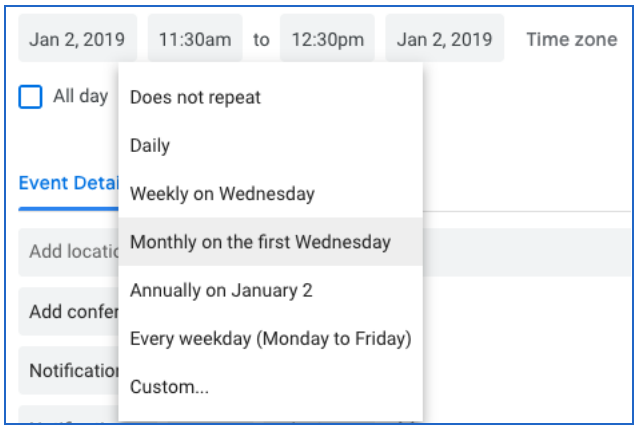
Repeating/Recurring Events and All Day Events

1. Open your Calendar Event
    a. Best Practice: enter your Event Title first
2. Set the event date and time (and timezone if needed)
3. You can set the event to an **All day** event or make it a repeating event

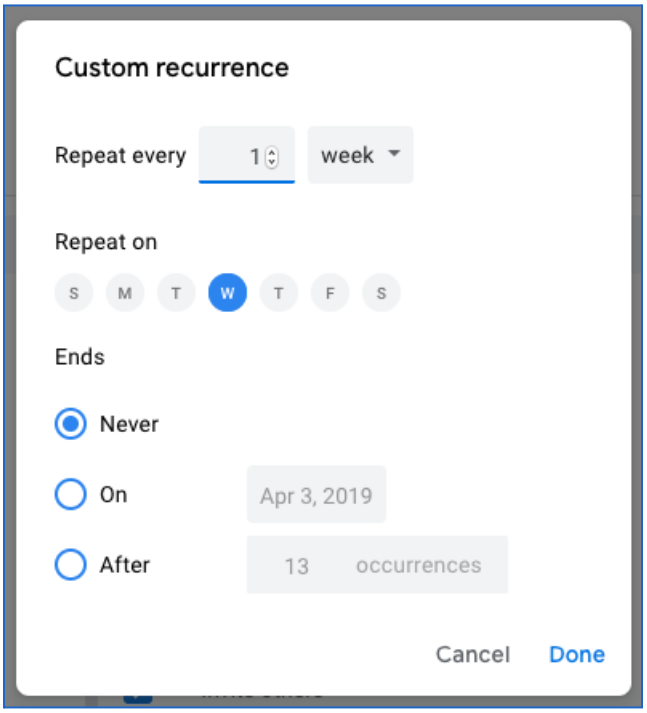


4. Select which applies:
    a. **All day**: Removes the time/timezone and leaves the date
    b. **Repeating**: A drop down appears with multiple repeating options
        i. Default is **Does not repeat**

        ii. Can select from default options

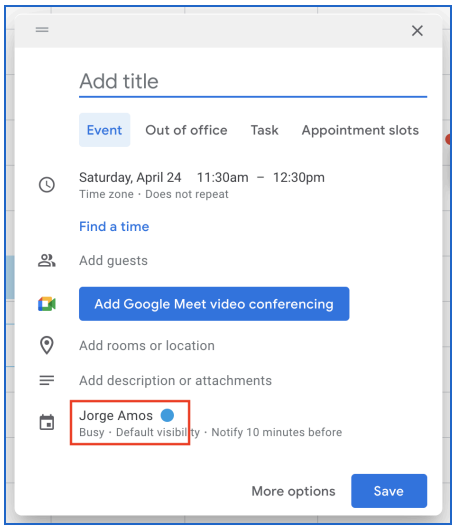


iii. Or select Custom recurrence
**Tip - It is best practice to recreate all recurring events that have migrated to Google Calendar.



Creating an Event (Appointment) on your Executive's behalf

1. Click the appropriate time within your Calendar and enter the name of the event in the **Add title** field of the pop-up window
2. Click your name (default calendar) to switch the event to your Executive's calendar

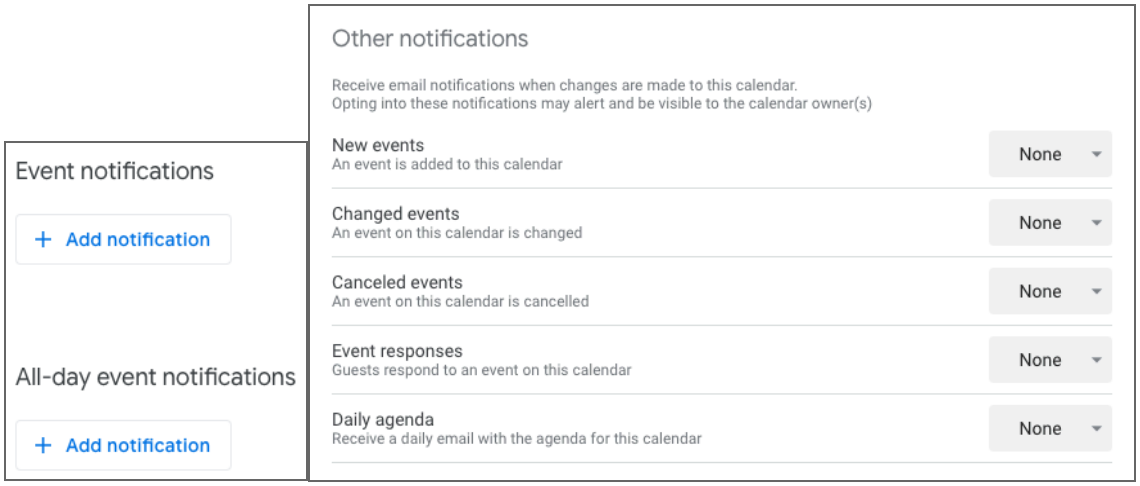


3. **Create event** (The event will be placed on your Calendar in its designated color as well as on your Executive's calendar)
4. Click the **Event** within your calendar
5. Add **Description**, **Guests** and **video conferencing** option (if applicable)
6. Click **Save**

Note**: Once created, you can always modify an event (e.g., switch it to another calendar, add additional attendees, etc.) by left-clicking the event and then clicking the **Edit event icon in the event details window or simply double-click the event

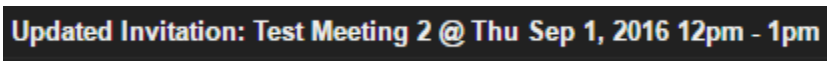
Receive Notifications for Your Executive's Calendar

1. Under **My calendars** click on the **Options** icon next to your Executive's name, then select **Settings and sharing**
2. Scroll down to **Event notifications**
3. **Notifications delivered to the Executive**
    a. To change the notifications your Executive receives your Executive must perform the following steps from their account:
        i. In **Settings and sharing**, scroll down to **Event notifications**
        ii. If *no alerts* are wanted, do not select the **+ Add notification** option under **Event notifications** or **All-day event notifications**, and all **Other notifications** settings should be set to **None**

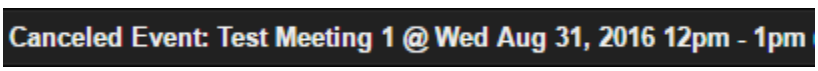


4. **Notifications delivered to the Assistant**
    a. To change the notifications you receive for your Executive's calendar you must perform the following steps from your account:
        i. In **Settings and sharing**, scroll down to **Event notifications**
        ii. Add notifications (up to 5) you want to receive for **Event notifications** and **All-day event notifications**
        iii. Scroll down to **Other notifications** and specify if you would like to receive **Email** or **None** for each notification type
5. If you choose to receive email updates for your exec's calendar, you can tell the Event type by the syntax that is used. Email notifications that are for new calendar events on your Executive's calendar are labeled "New Event". Email notifications for new calendar events on your own calendar are labeled "Invitation".
    a. Invitations that go to the Assistant 'for' your Executive are labeled '**New Event**'

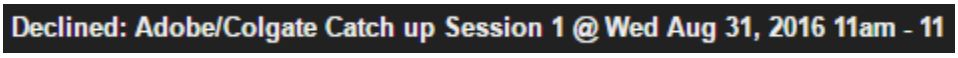
    b. Updated events sent to your (Assistant) inbox are labeled '**Updated Invitation**'



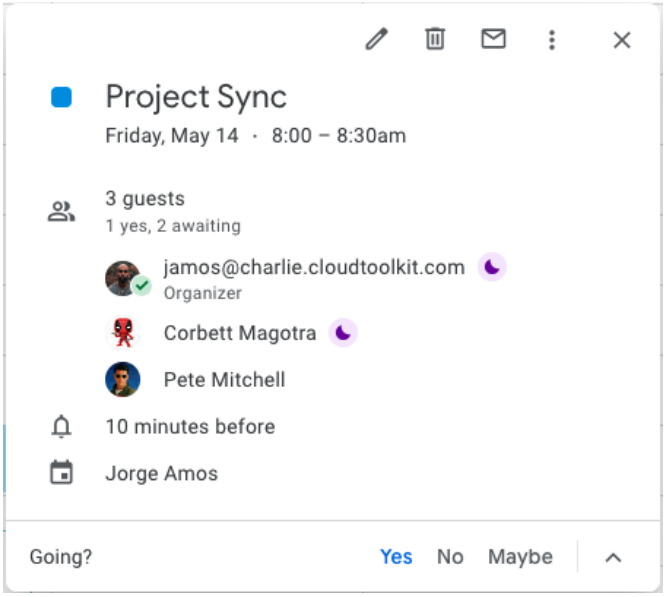
    c. Canceled events sent to your (Assistant) inbox are labeled '**Canceled Event**'

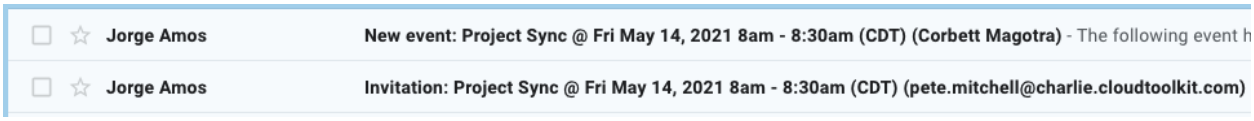


    d. Declined events sent to your (Assistant) inbox are labeled '**Declined: [event name]**'



As an example, the following images show an event both the Executive and Assistant are invited to as well as two email notifications in the Assistant's inbox. The first email is for the Assistant's calendar and the second is the notification for the Executive's calendar.



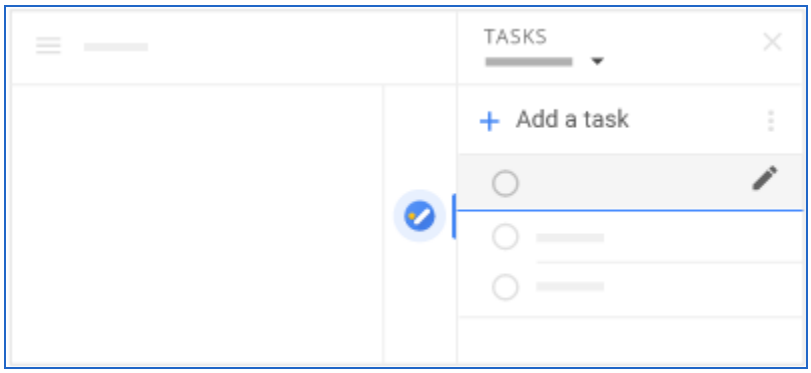


Create Tasks

Tasks act like a virtual to-do list. Keep track of your daily tasks, organize multiple lists, and track important deadlines with Google Tasks.

Open Tasks

1. Click the Tasks icon on the panel on the far right side of your screen in Mail, Calendar, or Drive
2. Click **Add a task**



3. To add a date, click the **Edit details** icon , then click **Add date/time**. The Tasks will appear on the user's calendar when Tasks are toggled on in the **My calendars** list.
   Note: There is no delegated capability for Tasks, in other words, an Assistant can only create tasks for themselves. An Executive would have to create and manage their own.

Add an email to a Task (Follow-Up)

You can accomplish this using either of the following three ways:

Using the Tasks icon

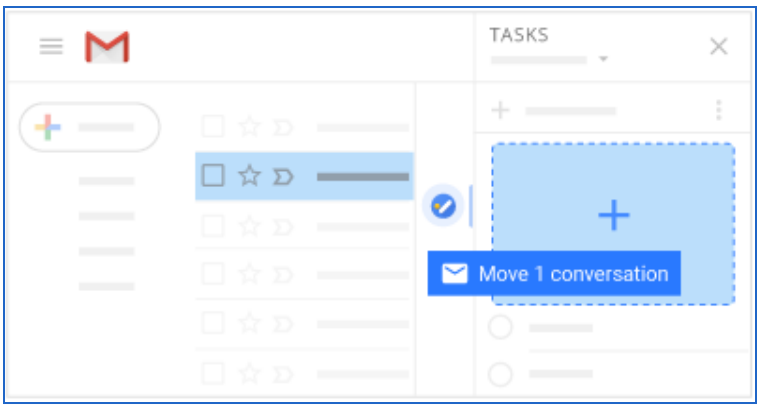
1. Place a check next to the email message you would like to add as a task
2. Select the **Add to tasks** icon in the top toolbar

Using Keyboard Shortcuts

- Ensure Keyboard Shortcuts are turned on in Settings under the General tab
- Open an email and press **Shift** + **T**

Using the 'click and drag' method from your Inbox

- Open Tasks in the right panel of your Gmail account
- Click and drag an email into the Tasks window

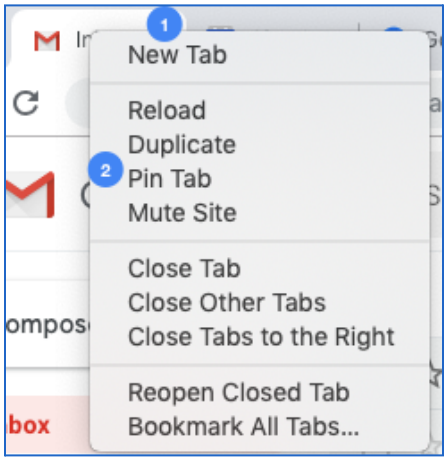


Google Chrome

Pinning Gmail or Calendar Tabs

Pinning Tabs allows you to keep Google Calendar and/or Gmail tabs permanently open in your Chrome browser.

1. **Right-click** on the Gmail or Calendar tab
2. Click **Pin Tab**



This tab will now automatically appear in the upper left of your browser even when you restart Chrome.

** Note - Upon restarting you might see the Calendar tab switched back to your Calendar instead of your Executive's due to the saved settings tied to your Chrome profile. You will have to change this back to your desired Calendar selection (e.g., your Executive's calendar). **

Font Enlargement (Permanent)

To permanently enlarge your browser's font perform the following steps:

1. Open Chrome
2. Select the 3 dots icon ⋮ in the top right corner
3. Go to **Settings**
4. Click **Appearance** and locate **Font size**
5. Update your permanent **Font size** or **Page zoom**

Font Enlargement (On the Fly)

To enlarge/reduce your font 'on the fly' perform the following steps:

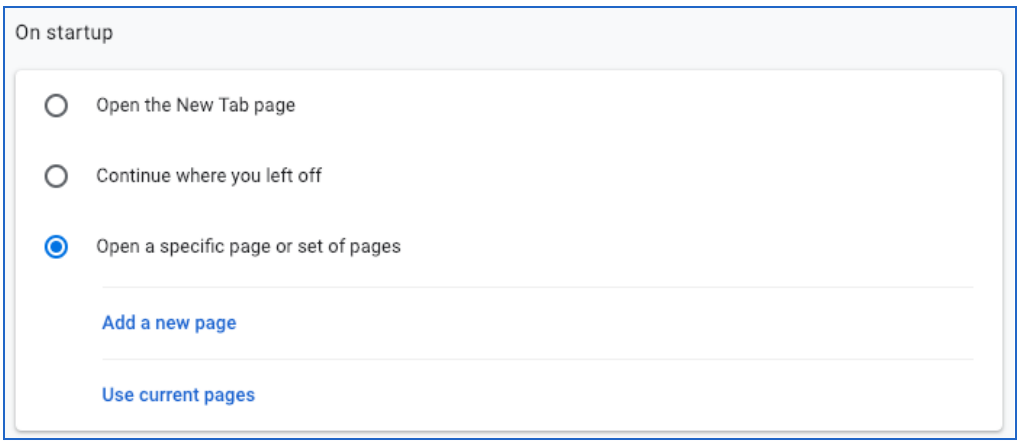
1. Open Chrome
2. Windows Users
    a. **Zoom in**: Ctrl and +, or press Ctrl and scroll your mouse wheel up
    b. **Zoom out**: Ctrl and -, or press Ctrl and scroll your mouse wheel up
3. Mac Users
    a. **Zoom in**: ⌘ and +, or press ⌘ and scroll your mouse wheel up
    b. **Zoom out**: ⌘ and -, or press ⌘ and scroll your mouse wheel up

Automatically Open Gmail/Calendar Tabs in Chrome

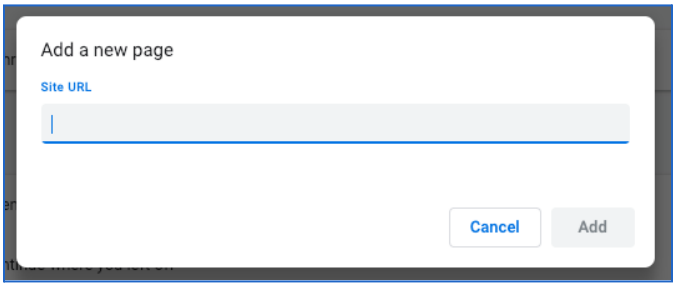
Perform the following steps if you would like to have your Gmail and Calendar tabs open automatically when you open Chrome.

Add a Gmail Tab

1. Open Chrome
2. Open Gmail
3. Once opened, click the website address (URL) once to select it, then Ctrl-C to copy it
4. Select the 3 dots icon ⋮ in the top right corner of your browser
5. Go to **Settings**
6. Click **On startup**
7. Select **Open a specific page or set of pages**

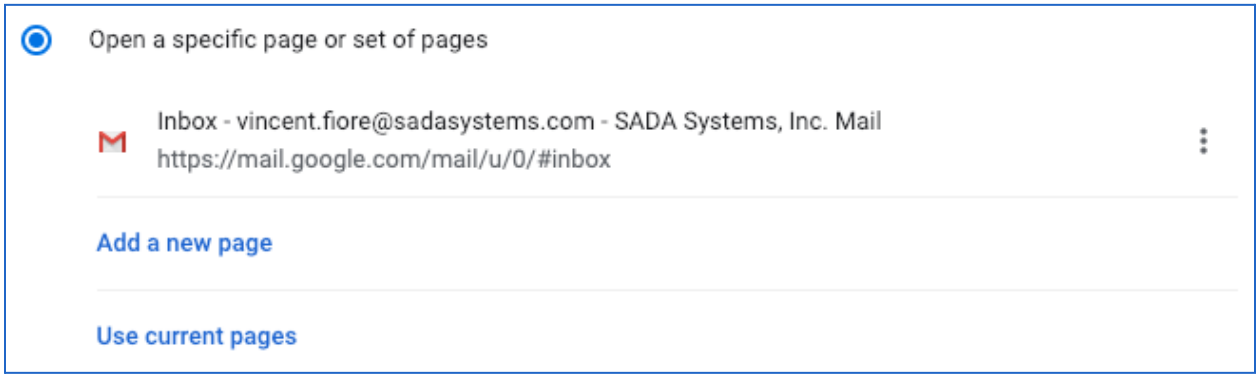


8. Click **Add a new page**
9. A pop-up box will appear that enables you to enter the website you prefer to open by default
10. Paste the URL link for Gmail (Ctrl-V) into **Site URL** and click **Add**



Add a Calendar Tab

1. Open your Calendar
2. Once opened, click the website address (URL) once to select it, then Ctrl-C to copy it
3. Repeat steps **5 through 10** above



Once restarted, you will see the Chrome browser will open with your Mail and Calendar tabs ready