



There are multiple ways to transfer or share knowledge. Methods can range from in-person to virtual meetings, recording yourself in Google while you complete a task, creating guides, and more.

Because most City departments use Google suite, we have listed some tools you can consider when determining how to document your processes and procedures. Take a look and choose what tool would work best for you and the type of information you are sharing.

1. Google Shared Drive
2. Google Docs
3. Google Sheets
4. Google Meets
5. Google Task
6. Google Calendar
7. Google Templates

Don't forget about ITA Training! ITA has amazing resources for the Google Suite items listed above, as well as in-depth training on **Google Gemini**. Google Gemini is Google's smart, conversational artificial intelligence. Think of it as a virtual assistant that can chat with you, answer questions, and help you create things—like writing emails, planning trips, or coding. Because it is “multimodal,” it can understand not just text, but also images, audio, and video.

Google Gemini is already tied to most of the Google Suite, so it can bring the basic functions discussed in this guide to the next level, making your knowledge transfer documentation and tracking even more efficient. Please be sure to check out the [Gemini training on ITA's website](#), as Gemini can play a major role not only in knowledge transfer, but in many other areas of the City!



1. GOOGLE DRIVES

Create a shared google drive to store resourceful documents, images, and videos. Creating a google drive allows you and your team to store and share multiple files or folders from one place, making it easier to organize and collaborate.

STEP 1: Create a Google Drive

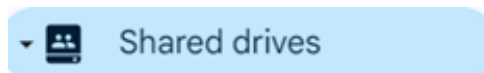
1. Go to Google Drive:

- Go to [Google Drive](#).
- Log in with your LA City account if you're not already signed in.



2. Create a Shared Drive:

- Once in Google Drive, left click on the “**Shared drives**” button.



- Select “**New shared drive**”.



- Name your Drive and click “**Create**”.

New folder

Cancel

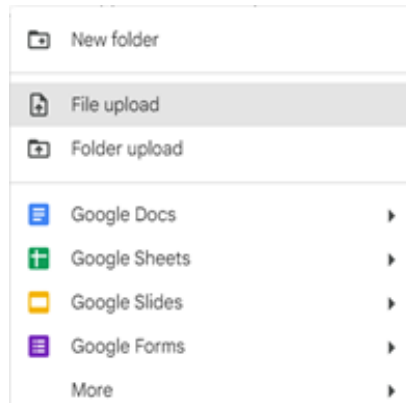
Create



STEP 2: Add Files or Folders to the Shared Drive

1. Upload Files or Folders:

- Open the drive you just created.
- Left click inside the drive, select “File upload, Folder upload, or New folder”.



- You can also drag and drop files directly into the folder.

STEP 3: Share the Google Drive Folder

1. Open Sharing Settings:

- Right-click on the folder you want to share and select “**Share**” from the menu.

2. Add People or Groups:

- In the sharing settings, you can enter the email addresses of the people or groups you want to share the folder with.
- Choose the level of access for each person (Viewer, Commenter, or Editor).

3. Get a Shareable Link (Optional):

- If you want to share the folder via a link, click on “Copy link.”
- Adjust the link settings by clicking on the dropdown menu (e.g., “Anyone with the link” can view/edit).

4. Send the Invitation:

- After setting the permissions, click “Send” to share the folder with the people you’ve added or share the link directly.



STEP 4: View Current Members and Permissions

1. Open Sharing Settings:

- Once inside the shared drive, click on the **"Manage members"** icon (a person with a plus sign) near the top right or right-click on the shared drive's name and select **"Manage members"**.

2. View Members:

- You'll see a list of all members with access to the shared drive along with their roles (Manager, Content Manager, Contributor, Commenter, or Viewer).

STEP 5: Adjust Member Permissions

1. Change Roles:

- To change a member's role, click on the dropdown menu next to their name.
- Select the new role (e.g., Manager, Content Manager) based on the level of access you want to grant them.

2. Remove Members:

- To remove someone from the shared drive, click the **"X"** next to their name.

STEP 6: Manage Sharing Settings

1. Access Shared Drive Settings:

- Click on the shared drive name at the top, then click on **"Manage settings"**.

2. Adjust Sharing Permissions:

- Under "Sharing permissions," you can set whether non-members can access the drive, and what members can do (e.g., share files outside the organization).

Note: The perk of a Shared Drive is that everyone who has access to the drive will see everything within that drive, automatically. You do not need to share individual items with each member who already has access to the drive. This is great for adding documents that all members need to see/have access to, including templates, department policies, etc. However, if there is someone you want to share a document or individual item with that does not have access to the drive, you can share just that item with them using the instructions above. Please see the example below.

Example: The PIROE manager creates a PIROE Shared Drive and adds all members from PIROE to that shared drive. Now whenever a folder, document, spreadsheet, etc., is added to the shared drive, all PIROE members will automatically have access. However, if a member of Executive Management needs to see one document within the PIROE Share Drive. A member from PIROE can go into that one document and add the Executive Management member to the specific doc without giving them access to the entire drive.



2. GOOGLE DOCS

Create documentation such as manuals, guides, and checklists that others can use.

STEP 1: Create a Google Doc

1. Go to Google Docs:

- Go to [Google Docs](#).
- Log in with your LA City Google account if you're not already signed in.

2. Create a New Document:

- Once on the Google Docs homepage, click on the "+ **Blank**" document icon to create a new document.
- A new blank document will open, where you can start typing or editing.

STEP 2: Add Content to the Document

1. Start Editing:

- You can now type, format text, insert images, and more. Google Docs automatically saves your work as you go.

STEP 3: Share the Google Doc

1. Open Sharing Settings:

- Click the "**Share**" button in the top right corner of the document.

2. Add People or Groups:

- In the sharing settings window, enter the email addresses of the people you want to share the document with.
- Choose their level of access (Viewer, Commenter, or Editor) from the dropdown menu next to their email address.



3. GOOGLE SHEETS

Use Google Sheets to keep track of projects, attach common used forms, or links to useful websites.

STEP 1: Create a Google Doc

1. Go to Google Sheets:

- Go to [Google Sheets](#).
- Log in with your LA City Google account if you're not already signed in.

2. Create a New Spreadsheet:

- On the Google Sheets homepage, click on the "+ **Blank**" spreadsheet icon to create a new sheet.
- A new blank spreadsheet will open where you can start entering data.

STEP 2: Add Content to the Spreadsheet

1. Start Entering Data:

- Begin typing in the cells to enter data, create formulas, or format the sheet as needed. Google Sheets automatically saves your work.

STEP 3: Share the Google Doc

1. Open Sharing Settings:

- Click the "**Share**" button in the top right corner of the document.

2. Add People or Groups:

- In the sharing settings window, enter the email addresses of the people you want to share the document with.
- Choose their level of access (Viewer, Commenter, or Editor) from the dropdown menu next to their email address.

3. Send the Invitation:

- After setting the permissions, click "**Send**" to share the sheet with the people you've added or share the link directly.



4. GOOGLE MEET

Use **Google Meet** to schedule meetings/ training sessions, record/archive meetings, record yourself walking through a process, or meet with staff and share your screen to go over procedures. To learn more about Google Meets, visit ITA's Office hours training here: [Hosting Google Meets](#).

5. GOOGLE TASK

Use **Google Task** to create to-do lists. You can add tasks directly from your email account and allow notifications for due dates. This is a great resource for reminders, recurring items, task-lists for projects, etc.

1. **Open Google Tasks:** In Gmail or Google Calendar, look for the **"Tasks"** icon on the right-hand side panel (it looks like a blue circle with a white checkmark). Click it to open Google Tasks.
2. **Add a New Task:** Click on **"Add a task"** to create a new one. Type in a description of the task and press Enter.
3. **Edit Details:** To add more details to a task, click on it. You can add a description, set a due date, or create subtasks for more complex items.
4. **Set Due Dates:** Click on a task, then select **"Add date/time"** to choose when it's due. You can also set tasks to repeat if they're recurring.
5. **Organize Tasks by Lists:** Use different lists for various projects by clicking on **"My Tasks"** at the top and selecting **"Create new list"**. This helps keep tasks organized by category.
6. **Mark Tasks as Completed:** Once a task is done, simply check the box next to it. Completed tasks will move to a separate **"Completed"** section, which you can review anytime.
7. **Access Tasks on Mobile:** Download the Google Tasks app on your mobile device to add and check off tasks on the go.



Using Google Tasks keeps you organized by allowing you to quickly capture, categorize, and manage all your to-dos in one place. If you turn on **"Tasks"** in Google Calendar, the tasks you create will appear on their due dates (assuming you added dates). This is helpful if you are looking at what is due on your calendar, but may be overwhelming to see in the calendar format if you have a lot of tasks.



6. GOOGLE CALENDAR

Using Google Calendar helps keep all your appointments, reminders, and meetings organized in one place, ensuring you stay on top of your schedule.

Here's a step-by-step guide on using Google Calendar:

1. **Open Google Calendar:** Go to calendar.google.com.

2. **Create a New Event:**

- Click on a date or time slot directly in the calendar, or press the “+” button (Create) at the top left.
- Enter the event title and details, including date, time, and location.

3. **Add Guests:**

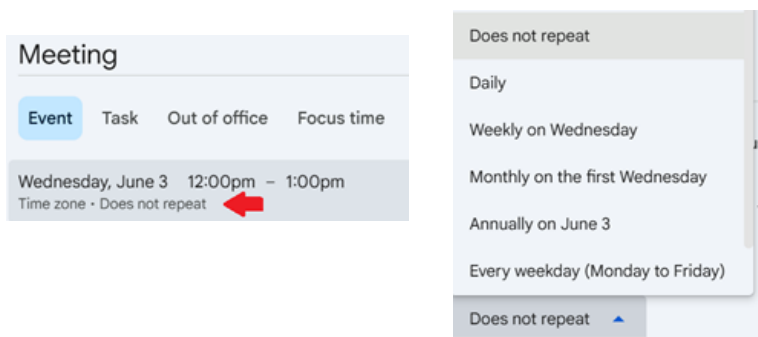
- To invite others, go to the “**Guests**” section and enter their email addresses. They’ll receive an invitation by email.

4. **Set Event Details:**

- **Choose a time:** Select a start and end time for the event.
- **Set a location:** Add a physical address or a Google Meet link for a virtual meeting.
- **Add a description:** Include notes or details for the event.
- **Set notifications:** Set reminders before the event (e.g., 10 minutes or 1 day before).

5. **Create Recurring Events:**

- For events that repeat (like weekly meetings), you can add recurrence by editing the “**Does not repeat**” option under the date. Simply click this button and select how often you want the event should recur.



6. **Change Calendar View:**

- Choose between daily, weekly, monthly, or custom views by selecting options at the top of the calendar. This can help you see your schedule in different formats.

7. **Color-Code Events:**

- Right-click on an event or use the “**Event color**” option when creating/editing an event. Different colors help you categorize and visualize different types of events.

8. **Share Your Calendar:**

- To share your calendar with others, go to “**My calendars**” on the left, hover over the calendar you want to share, click the three dots, and select “**Settings and sharing**”.

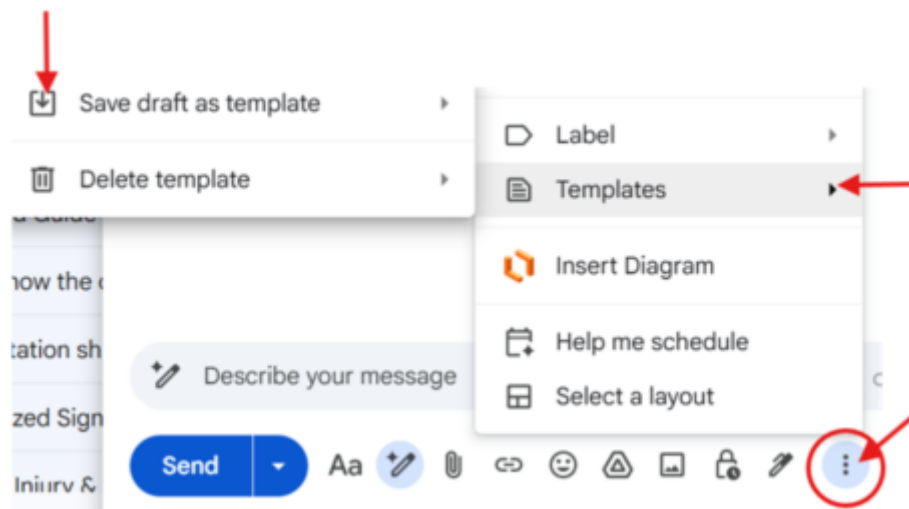


7. GOOGLE EMAIL TEMPLATES

Use Google email templates to save time and keep messages consistent. With templates, teams can quickly send common emails like instructions or frequently asked questions without having to retype them each time.

A. Creating a Template

1. **Open Gmail:** Log in to your Gmail account.
2. **Enable Templates:**
 - Click on the gear icon (⚙️) in the top right corner, then select “**See all settings**”.
 - Go to the **Advanced** tab, find **Templates**, and select **Enable**.
 - Scroll down and click **Save Changes**.
3. **Compose a Template:**
 - Click **Compose** to open a new email.
 - Write the email content you want to save as a template.
 - Delete your email signature from the email template, as the signature will be added automatically when you compose the email in the future.
4. **Save as Template**
 - Click the three dots (**more options**) in the lower right corner of the compose window.
 - Hover over **Templates**, then select **Save draft as template** > **Save as new template**.
 - Name your template, then click **Save**. This name will help you find the template quickly.





B. Using an Email Template

1. Open a New Email:

- Click **Compose** to start a new email **OR**
- Reply to an email you received

2. Insert Template:

- Click the three dots in the lower right corner, hover over **Templates**, and choose the template you want from the list.
- The template content will be inserted into your email.

3. Edit an Send:

- Make any changes needed to customize the email, then add the recipient's email address.
- Click **Send** to send the email.

C. Managing or Deleting Templates

- To delete or update a template, go to the **Templates** menu, hover over the template you want to edit, and choose **Save draft as template > Overwrite template** or **Delete template**. Using Gmail templates saves time and ensures consistency in your emails, especially when sending similar messages frequently.



Google has some awesome tools! We hope you use these when creating your Knowledge Transfer toolkits/resources!