Electronic Tools for Organization & Time Management and their Optimal Use

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Turning Point Set Up

Enter "Go, 41, Go" Into Response Card
Audience Demographics

1. Research Scientist
2. Clinical Investigator
3. Clinician Educator
4. Clinician
5. Administrator
6. Other
Audience Motivation

I am:

1. Productive…..
   *Want to be even more productive*

2. Not as productive as I should be
   *Want to be more productive*

3. Organizationally challenged

4. Here for the food
Outline

• The Problem / Common Challenges
• Basic Principles
• Windows & File Management
• Connecting remotely
• Outlook
• PowerPoint
• Internet Tools
• Web Applications
• More Information
• Questions
The Problem / Common Challenges

• The Problem
  – Academic Medicine is information intensive
  – Inadequate training to manage all this information
  – Available tools are not used or used ineffectively

• Common Challenges
  – Windows
  – Managing Documents
  – eMail
  – Working remotely
  – Creating Presentations
Definition: Time management

- A range of skills, tools, and techniques used to manage time when accomplishing specific tasks, projects and goals (Business & Personal)
  - planning, allocating, setting goals, delegation, analysis of time spent, monitoring, organizing, scheduling, and prioritizing.
  - A time management system is a designed combination of processes, tools and techniques.
Basic Principles

• Adults learn when there is a need to know
  • Eliminate repetitive activities (automate / avoid)

• Be curious
  • Don't accept "No" for an answer
  • Explore / Find a faster, smarter, easier way

• Never touch a document more than once
  • Decide what to do immediately
  • Build a system to accommodate
  • Do (Read, Think, Write, Speak) Defer, Delegate, Delete

• Do Today’s Work Today
  – What is it / How long will it take / What’s your capacity?

• Optimize Work Environment
  • Eliminate clutter / Eliminate paper
  • Increase screen area / Ensure your PC performs
Tactics

• Create a “To Do List” - Organize it daily
• Prioritize ruthlessly
• Make appointments with yourself
• Delegate and/or outsource
• Break large time-consuming tasks into smaller tasks
High-level prioritization Schema (Covey)

URGENT

I
- Crisis
- Pressing Problems
- Deadline-driven projects

II
- Planning
- Prevention
- Relationship Building
- Recreation
- New Opportunities

NOT URGENT

III
- Interruptions
- Some Phone Calls
- Some Mail
- Some Meetings
- Popular Activities

IV
- Trivia
- Some Mail
- Some Phone Calls
- Time wasters
- Pleasure Activities
Windows

• Internet Explorer
  – Think Documents not Applications
  – Folder View – Opening Files
  – Print, Send To, Open
  – Map Network Drives

• Task Bar
  – Quick Launch
  – Arrange active windows
  – Custom Tool Bars
    • Favorites / Links / Mapped Drives
File Management

• Store all files and eMail on the network
• Create a logical filing and naming system
  • Use dates & version numbers
• Use same system for storing:
  • Documents
  • eMail
### Go Faster Use Keyboard Shortcuts

<table>
<thead>
<tr>
<th>Action</th>
<th>Key Stroke</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close the Active Window</td>
<td>Alt + F4</td>
</tr>
<tr>
<td>Toggle active windows</td>
<td>Alt + Tab &amp; Alt + Esc</td>
</tr>
<tr>
<td>Copy to the Clipboard</td>
<td>Ctrl + C</td>
</tr>
<tr>
<td>Undo</td>
<td>Ctrl + z</td>
</tr>
<tr>
<td>Redo</td>
<td>Ctrl + Y</td>
</tr>
<tr>
<td>Cut to the Clipboard</td>
<td>Ctrl + X</td>
</tr>
<tr>
<td>Paste from the Clipboard</td>
<td>Ctrl + V</td>
</tr>
<tr>
<td>Special Paste from the Clipboard</td>
<td>Ctrl + Alt + V</td>
</tr>
<tr>
<td>Select all</td>
<td>Ctrl + A or Ctrl + Numpad 5</td>
</tr>
<tr>
<td>Spelling</td>
<td>F7</td>
</tr>
<tr>
<td>Thesaurus</td>
<td>Shift + F7</td>
</tr>
<tr>
<td>Bold / Underline / Italicize</td>
<td>Ctrl + B / Ctrl + U / Ctrl + I</td>
</tr>
<tr>
<td>SubScript</td>
<td>Ctrl + &lt;+-&gt;</td>
</tr>
<tr>
<td>Super Script</td>
<td>Ctrl + Shift + &lt;+-&gt;</td>
</tr>
<tr>
<td>Increase selected font size</td>
<td>Ctrl + ] or Ctrl + Shift + &gt;</td>
</tr>
<tr>
<td>Decrease selected font size</td>
<td>Ctrl + [ or Ctrl + Shift + &lt;</td>
</tr>
<tr>
<td>Toggle case</td>
<td>Ctrl + F3 / Ctrl + F3 / Ctrl + F3/</td>
</tr>
<tr>
<td>Repeat previously typed text</td>
<td>F4</td>
</tr>
<tr>
<td>Find / Replace / Go to</td>
<td>Ctrl + F / Ctrl + H / Ctrl + G or F5</td>
</tr>
</tbody>
</table>
## Go Faster Use Keyboard Shortcuts

<table>
<thead>
<tr>
<th>Action</th>
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<tbody>
<tr>
<td><strong>Cursor Tricks</strong></td>
<td></td>
</tr>
<tr>
<td>Move cursor to beginning/end of word</td>
<td>Ctrl + &lt;left/right arrow&gt;</td>
</tr>
<tr>
<td>Move cursor to beginning/end of paragraph</td>
<td>Ctrl + &lt;up/down arrow&gt;</td>
</tr>
<tr>
<td>From cursor, select word</td>
<td>Ctrl + Shift + &lt;left/right arrow&gt;</td>
</tr>
<tr>
<td>From cursor, select text</td>
<td>Shift + &lt;left/right arrow&gt;</td>
</tr>
<tr>
<td>Moving lines up or down</td>
<td>Alt + Shift &lt;up/down arrow&gt;</td>
</tr>
<tr>
<td>Go to the end of a document or last cell</td>
<td>Ctrl + End</td>
</tr>
<tr>
<td>Go to the end of a line</td>
<td>End</td>
</tr>
<tr>
<td>Go to the beginning of a document</td>
<td>Ctrl + Home</td>
</tr>
<tr>
<td>Go to the beginning of a line in Word, Notepad, etc. / first cell in a row</td>
<td>Home</td>
</tr>
</tbody>
</table>
Working Remotely

1. Set Office PC to accept remote calls
2. At BMC
   – Connect to Office PC via Remote Desktop Connection
3. At Home
   – Install VPN – RDP on remote PC
     • [http://www.bmc.org/its/bmc_vpn.exe](http://www.bmc.org/its/bmc_vpn.exe)
   – Connect to Office PC via Remote Desktop Connection

Consider signing up for BU Terminal Services
Avoid the eMail Web Client.

www.myBMC.org
Outlook

• Personal information database
  – eMail
  – Calendar / Scheduling
  – To do list / Tasks
  – Notes
  – Contacts
  – Journal
  – Shortcuts
eMail Challenges

• eMail “Jail”
  • Definition
  • Cause:
    • Use of Outlook as a File Cabinet and/or as a ‘To Do List”
    • Poorly Tuned Auto-Archive settings
  • Prophylaxis

• eMail efficiency
  • 120 emails / day X 15 seconds (on average) saved per email = 30 minutes per day saved.
  • Solution: Apply advanced techniques
Develop a personal eMail policy

Do…

– Aim for Zero Inbox at the end of the day
– Touch each piece of email ONLY once
– Take action (delete / archive it / defer it for later response / generate an action)
– Respond immediately ONLY if (< 2 minutes or so important can’t wait)
– Write less (Less is more)
– Let email program manage email as much as possible.
– Schedule time to answer the email you get - stick to that schedule
– Shut off auto-check (Turn off or set to 30 - 60 min)
– Create a Category system
Develop a personal eMail policy

Don’t…

– Use your inbox as a “To Do List.”
– Use your inbox as a filing cabinet.
– Don't read and answer your email all day long.
– Do not check your email on demand.
  - Don’t look for interruptions!
– Don't answer your email at your most productive time of day.
Advanced eMail Techniques 1

• **Use Key-board Short cuts**
  • Ctrl-N, Ctrl-R, Ctrl-F, Ctrl-Shift R, Ctrl-D

• **Automate Everything: Create & Use Email rules**
  – Junk mail
  – eMail Rules
  – Archiving
Advanced eMail Techniques 2

• **Manage your Email**
  – Set up a Filing System
  – Configuring the Reading Pane
  – Tracking
    – Search Folders
    – Arrange by…Date / Conversation / Categorizing (colors) / FU
      Flagging / Grouping / Sorting
    – Flagging
  – Favorites Folder
  – File attached documents and then remove
  – Finding saved email

• **Set up Resources / Shortcuts in Outlook**
Advanced PowerPoint Techniques

• One Step PowerPoint Creation
  – From detailed outline (MS Word)
  – To Format-ready slides

• Presenter View

• TurningPoint (Audience Response System)
Internet Tools

• **Web Browser**
  – Get a Browser that support tabs
    • IE 8.0
    • Google Chrome
    • Firefox
  – **Set up and manage:**
    • Favorites
    • Links
    • Favorites Bar
Web Applications

• Doodle
• Google
  – Cheat Sheet
  – iGoogle / Google Desktop/Search
• Survey Monkey
• Wikis
• PodCasts
• SharePoint
• RSS (Real Simple Syndication)
• RefWorks
More Information

• Where to learn more or get help
  – Microsoft at Work
  – Microsoft Office On-line: Help and How-to
  – BU Subscription to Element K

• Social Media
Questions?