

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)



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

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

Go Faster Use Keyboard Shortcuts

Action	Key Stroke
<u>Cursor Tricks</u>	
Move cursor to beginning/end of word	Ctrl + <left/right arrow>
Move cursor to beginning/end of paragraph	Ctrl + <up/down arrow>
From cursor, select word	Ctrl + Shift + <left/right arrow>
From cursor, select text	Shift + <left/right arrow>
Moving lines up or down	Alt + Shift <up/down arrow>
Go to the end of a document or last cell	Ctrl + End
Go to the end of a line	End
Go to the beginning of a document	Ctrl + Home
Go to the beginning of a line in Word, Notepad, etc. / first cell in a row	Home

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
 - Connect to Office PC via Remote Desktop Connection

Consider signing up for BU Terminal Services

<http://www.bumc.bu.edu/bumc-oit/email/tsweb/>

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*
http://www.googleguide.com/advanced_operators_reference.html
 - *iGoogle / Google Desktop/Search*
- Survey Monkey
- Wikis
- PodCasts
- SharePoint
- RSS (Real Simple Syndication)
- RefWorks
 - <http://www.refworks.com/Refworks/login.asp>

More Information

- **Where to learn more or get help**

- Microsoft at Work

- <http://www.microsoft.com/atwork/default.aspx>

- Microsoft Office On-line: Help and How-to

- <http://office.microsoft.com/en-us/help/default.aspx>

- BU Subscription to Element K

- <http://www.bumc.bu.edu/bumc-oit/webinfo/elementk/>

- **Social Media**

- <http://mashable.com/2010/01/02/how-to-guide-2010/>

Questions?