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Be More Productive with Everyday Technology

By J. Eddie Smith, IV



J. Eddie Smith, IV, FSA, MAAA is an assistant actuary with RBC Insurance. He is also an exam instructor with The Infinite Actuary. He can be reached at j.eddie.smith.iv@gmail.com

“Do more with less.” We hear and feel it constantly these days. Today’s business world requires us to complete highly complex tasks in very short periods of time with an ever-diminishing availability of people resources.

Fortunately, technology resources have not been diminishing, and even though it may be difficult to invest in new technology in the current economic environment, the standard technology toolbox available in the workplace is the most advanced ever, and it can indeed make it possible to do more with less.

But only if you utilize your technology efficiently.

As a group, actuaries tend to have a proclivity for technology. However, you may be someone right out of school that has not had a chance to pick up skills on the job, you may be a senior-level executive who began working before computers became as common as staplers in the workplace, or you may be anywhere in between and have just become accustomed to doing things a certain way. Whatever group you fall into, it is very likely that there are things that you can do to make yourself more productive (and valuable) by utilizing everyday technology tools more efficiently.

In the sections that follow, I list tips for common tasks in Windows. The information presented here just barely scratches the surface of the capabilities of these applications and is intended to be a primer only. I would encourage you to practice some of these tips and then look for more on your own. Hopefully you will find ways to incorporate these tips into your workflow to make your day go a little smoother. The idea is to give you more control of your technology (rather than letting the technology control you).

GENERAL WINDOWS USE

Quick Launch. Utilize the quick launch toolbar (next to Start button) by putting shortcuts there for commonly accessed applications. Avoid going to Start > Programs to open applications that you use regularly. Additionally, move any shortcuts cluttering up your desktop into the quick launch toolbar. That way, you can access them anytime without needing to show your desktop.

Keyboard shortcuts. I encourage you to embrace your keyboard as a highly efficient interface between you and your computer. Listed below are a few general

Windows keyboard shortcuts that I use all the time. If you currently use your mouse for most of these activities, I guarantee that your productivity will soar if you utilize your keyboard for these tasks instead:

General Windows Keyboard Shortcuts:

ALT+TAB	Switch from one open window to another.
ALT+F4	Close a Window. This also brings up the Windows “shut down” prompt if no Windows are in focus (i.e., the desktop is visible/active).
Win+D	Minimize all windows and show desktop.
Win+E	Open Windows Explorer.
Win+L	Lock your computer.

Keyboard Shortcuts that Work in Most Common Application

CTRL+S	Save file.
CTRL+Z	Undo last action.
CTRL+Y	Redo the last undo.
CTRL+N	Create new file (e.g., Excel workbook, Word document).
CTRL+B	Apply bold format.
CTRL+U	Apply underline format.
CTRL+C	Copy cells to clipboard.
CTRL+X	Cut cells to clipboard.
CTRL+V	Paste contents of clipboard.
F7	Spell check.

Stay organized. Keep keep your digital “desk” clean.

- Create a “temp” folder on your desktop for random files so that you avoid clutter. Keep it sorted by date modified and clean it out every so often.
- Every hour or so, look at how many windows you have open. Do you need them all right now? Close any that you don’t need to: 1) de-clutter your workspace, and 2) help ensure that you are not leaving unsaved documents open or documents that others on your network may need to modify.

WINDOWS EXPLORER

Utilize Favorites. Do you spend a lot of time in Windows Explorer and often have to scroll up and down the folder tree pane? Fortunately, you can save a lot of time by using Favorites to navigate quickly to common spots rather than using the folder tree view. Yes, you can “bookmark” folders just like you do Web sites using the Favorites menu. You can also add a Favorites button to the Explorer toolbar by right-clicking the standard toolbar and choosing Customize. Bookmarking folders that you visit often allows you to get to them in one click no matter where you are on your hard drive or network—just keep the Favorites side bar displayed.

Utilize History. Did you know that Windows keeps track of the documents you’ve been working on just like a Web browser keeps up with your browsing history? The History feature is useful for quickly reopening, say, a spreadsheet that you just accidentally closed or a file that you were working on last Tuesday but can’t remember where you saved it. You can also add a History button to your toolbar.

Keyboard shortcuts. Yes, I do love keyboard shortcuts (and you should too). Here are a few that are specific to Windows Explorer:

BACKSPACE	Move up one folder level.
CTRL+ Number Pad + -	Auto-size columns in the “Details” view.
F2	Rename the selected file or folder.
CTRL+C then CTRL+V	Quickly duplicate files.
ALT+F+N+F	Create new folder.
F5	Refresh directories (like refreshing a Web page).
CTRL+I	Show Favorites in side bar.
CTRL+H	Show History in side bar.

MICROSOFT OUTLOOK

Most of the business world relies on Outlook for e-mail, calendar and task management. I must admit that Outlook is not my preferred e-mail client, and I only use

it at my day job, where it is required. Out of the box, I would argue that Outlook is designed to facilitate your rapid drowning in e-mail even if you only receive a moderate volume of messages on a daily basis. The following tips will help you make the most of Outlook and allow you to take steps toward controlling Outlook, rather than it controlling you. If you use Lotus Notes or some other e-mail client, it is likely that you can apply some of the concepts below to those applications.

Turn off new message alerts. By default, Outlook alerts you with a little pop-up message each time a new message arrives as well as playing a sound. If you are like most professionals, you receive a steady stream of e-mail throughout the day, and consequently, Outlook is constantly nagging you as you do other work. Eliminating these distractions makes it significantly easier to focus on the task at hand and makes it easier to deal with e-mail on your own terms. In Outlook 2003, the message notification settings are buried in Tools > Options > Preferences tab > Email Options > Advanced Email Options. Once you arrive there, uncheck everything under the “When new items arrive in my inbox” section, and instantly begin enjoying the benefits of a less disruptive work space.

Keep as few emails in your inbox as possible. I cannot overstate the amount of clarity and sense of control you gain by keeping e-mails out of your inbox. In fact, there is an entire movement called Inbox Zero pioneered by Merlin Mann that advocates taking control of e-mail by keeping your inbox as empty as possible. It advocates turning e-mail “noise” into actionable tasks that you methodically execute. You can read all about Inbox Zero concepts at <http://www.43folders.com/izero>. Another great resource is the book *Getting Things Done* by David Allen.

Use Rules. Outlook has some fairly sophisticated options for filtering incoming and outgoing mail. You can use Rules to automatically move messages from specific senders to another folder, automatically flag messages, and a multitude of other actions. Just go to Tools > Rules and Alerts, and begin exploring the choices. As an example, I automatically route all “newsletters” I receive to a specific folder that I can peruse once a day.

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Use e-mail folders smartly. Utilize the Favorites pane in Outlook for folders that you access often. Create search folders to scan for messages with specific criteria (e.g., flagged messages, e-mails that are more than X days old, unread items, e-mails tagged with a specific category, etc.). By carving your pile of e-mail into well-defined, actionable buckets, you can process your mail more efficiently.

Keyboard shortcuts. If you spend a significant amount of your day in Outlook (like many professionals), using keyboard shortcuts can greatly reduce the amount of time it takes to process messages because your hands can stay on your keyboard (rather than moving back and forth from the keyboard to the mouse). Here are just a few that I use incessantly:

Email shortcuts

CTRL+R	Reply to selected message or active message.
CTRL+SHIFT+R	Reply all to selected message or active message.
CTRL+F	Forward selected message or active message.
CTRL+ENTER	Send message.
CTRL+SHIFT+M	Compose new e-mail (anywhere in Outlook).
CTRL+Q	Mark selected messages read.
CTRL+SHIFT+G	Flag and/or assign reminder to selected messages.
CTRL+SHIFT+I	Go to inbox from anywhere in Outlook.
CTRL+Y	Go to any mail folder.
CTRL+SHIFT+V	move message to a folder.

Calendar shortcuts

CTRL+SHIFT+A	New calendar entry (anywhere in Outlook).
CTRL+G	Go to a specific date.

In the Day view, you can press ALT+2, ALT+3, etc., to view two days, three days, etc., at a time.

Task shortcuts

CTRL+SHIFT+K Create a new task (anywhere in Outlook).

Type dates and times into “due” and “reminder” fields instead of using your mouse to select from the drop-down menus. Outlook recognizes many date formats. For example, you can type “today” or “tomorrow” or “fri,” and it will know what you mean.

Use conversation groups. Outlook can organize the contents of mail folders in a number of ways; just check out the View menu sometime. One very useful “view” that you may not know about is the Conversation view. This view is a lifesaver if you have been away on vacation and have a bulging inbox because it groups e-mails by subject, then sorts by date received. It allows you to quickly see all messages related to a specific conversation and go straight to the most recent e-mail in that conversation. You may be able to eliminate 10+ e-mails at a time in each conversation and speed your way to an empty inbox. You can quickly organize your messages by conversation by going to Views > Arrange By and selecting Conversation. You will also notice a number of other fields that can be used as grouping keys.

Use Find Related Messages. If you right-click a message in a folder, you can select “Find Related” messages to quickly locate other e-mails in a conversation even if they are scattered across different mail folders. This is very useful for tracking down attachments related to a conversation and also finding past responses you have made.

As I said before, I hope you find some of these tips useful, and I would very much welcome any feedback or be happy to elaborate on the items discussed here. Moreover, if you are interested in other technology topics aimed at beginners, improving workflow efficiency, or general computing tips, please let me know at j.eddie.smith.iv@gmail.com. Given that actuarial work is so heavily impacted and aided by technology, it only makes sense that we educate ourselves and our staff as much as possible to get the most out of the technology resources we already have. ■