

ARTS ISIT WELCOME BACK CONFERENCE

No Thanks! We're Busy: Using Technology for Productivity



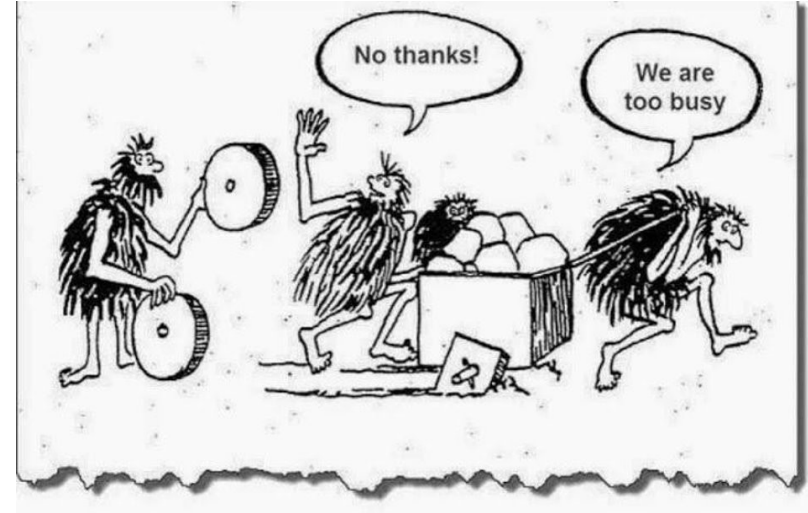
THE UNIVERSITY OF BRITISH COLUMBIA

Arts Instructional Support & Information Technology
Faculty of Arts

Introduction

For many staff and faculty members, the list of to-dos can seem to grow endlessly. In our effort to tackle these never-ending lists, we may miss opportunities to try things that can make our lives easier.

In today's workshop, we'll cover some tools and techniques that can help you organize your work, complete individual and group tasks, and improve productivity.



Presenters

Violet Addams, Administrator, History

Gary Chan, Manager, Help Desk & AV Support, Arts ISIT

Cara Chuang, Manager, Projects & Administration, Arts ISIT

Daniel Pugh, Associate Director, Arts ISIT

Email Tips

Violet Addams, Administrator, History

Email Reality

Email is intrinsic to our work

It is the inescapable horrid reality of information sharing, task doing, and connection building of the modern age. It has the reproductive qualities of fruit flies and is as inevitable.

But handling email effectively IS a **learnable skill**.



TIP #1: Setup Outlook to Work OFFLINE

Practice

- ❑ Start of day or when going in to focus on going through, assessing and working on email, switch to “offline” mode
 - Emails you send rest in outbox
 - Nothing new can come in
- ❑ Go through declutter 5 steps with your email, until you’ve reached your limit: unread/the inbox/time set aside/emotionally exhausted
- ❑ Switch back online when finished

Results

- ❑ Actually clear out inbox!
- ❑ Avoid the quicksand of the quick reply email threads; don’t get hijacked off your priority list
- ❑ Make real progress

Worried people can’t reach you?

Give the important ones an alternate contact point and consider the cost/benefit analysis/need of being constantly available.

TIP #2: Turn OFF Notifications

Practice

- ❑ Set rules so you receive notifications only for specific email addresses OR turn off all notifications
- ❑ Have specific 'email work blocks' for checking in with email
- ❑ YOU choose when to engage with email, it doesn't choose for you

Results

- ❑ Less stress. Move from many, small dopamine hits with long-term stress, to longer running dopamine with less stress.
- ❑ Stay focused longer, get more done. It takes an average of 23 minutes (and 15 seconds) to refocus on a task after an interruption, even if the distraction was brief.

Worried people can't reach you?

Give the important ones an alternate contact point and consider the cost/benefit analysis/need of being constantly available.

TIP #3: Actually USE Quick Steps

If you do things repeatedly, use a Quick Step!

- moving emails into your calendar as your method of task management;
- frequently forwarding emails to a particular person or group of people;
- a folder you move emails to regularly, etc.

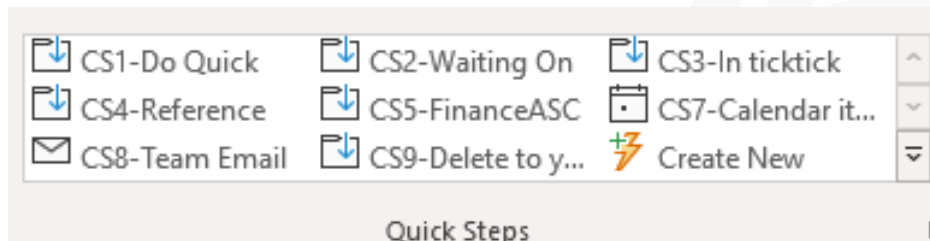
PRO TIP 1: Label the quick step with its keyboard shortcut

- Ex. CS7-Calendar = ctrl+shift+7 will move that email into a calendar item

PRO TIP 2: Use the same number for the quick step & folder

- Ex. Folder name: "2. Waiting On". Quick Step name: "CS2-Waiting On"

Keyboard shortcuts for the win!



What is YOUR email type?

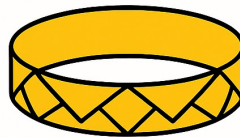
The One Ring: One box to receive them all, one box to look through, one box to hold them all, and in that inbox work on. No sub folders. Thousands of emails in inbox.

The Librarian: Folders upon folders, everything filed away or organized by categories.

The Relocator: That which can't be dealt with immediately gets moved to a different task management place, inbox at or near zero.

The Annihilator: There is no time. Do or delete. Mailbox at less than one screen at all times.

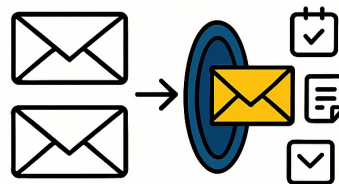
THE ONE RING



THE LIBRARIAN



THE RELOCATOR



THE ANNIHILATOR



Decluttering Email

It IS possible!! I went from over 500 to zero in under 3 days and did NOT spend every hour during that time on it.

This method is based on Dana K. White's 5 step decluttering method, with some necessary adjustments.

Steps can be done:

- In the order listed (i.e. look for all deletable emails first) OR
- By triaging each email to its 'final' home, one by one



Decluttering Email: Steps 1-3

Step 1: “Trash”

- If you can delete it, do!
- If you are horrified at the idea of actual ‘hard’ deletion, consider a ‘soft’ deletion of a “deleted 2025” folder and make a quick step to toss items into it.

Step 2: “Duh Donations”

- This is actually for someone else to do, a quick reply and cc or forward takes care of it, so do that!
- And then hard or soft delete it

Step 3: “Easy Stuff”

- I know where this goes or what to do with it or can answer it in x minutes or less.
 - X = the amount of time you have available to review your inbox/# of items in it OR a personal standard of 2 minutes or 5 minutes. But do have a limit.
- If it will take more than the pre-determined x minutes to clear it...

Decluttering Email: Step 4a

Step 4a: "Sorting, Put It There Now"

Ask yourself: When it's time to work on this item, what would tell me it's time and where would I go to find it? Put it there NOW.

- In your task management system/program/process
- SORT IT, i.e. categorize/tag (priority/funnel, when, what topic area), mark it, flag it, whatever you need to do to be able to focus in on the important things when you go to look at it and not just the immediate things
- Example: Mine are tagged with month I need to do it in, Top20, priority/funnel level, area of responsibility
- Don't wait, don't tell yourself 'I'll do that right after I finish going through the rest of the emails'. NO! Break the habit of skipping on and leaving it just sitting there. This is the hardest thing for me to do and it is the one that has the most worth.

Decluttering Email: Step 4b

Step 4b: "Sorting (The Addams Funnel)"

Ask the question: Is this something I...

- Am already doing? It's woven into my work so expectation is that I will do. Typically processes.
- Opportunities! Does this actually need to be done?
- Can it be done more efficiently?
- Will do? This is so important to me and/or my boss/staff/organization that not doing it would be a major detriment, so I am committed to adding this in to what I'm already doing. Often projects.
- Want to do? This would make me (or maybe others) happy but it isn't strictly necessary.
- Can wait to do? Maybe it's important later, but not right now so it can wait until its time comes. Or it isn't woven in, it's not a certain 'will do', and it's not as important as the other things on my want list. It can wait.
- Won't do. Embrace the won't. Let it go. Free yourself from the burden of expectations and unfinished, unstarted tasks!

Decluttering Email: Step 5

Step 5a: "Work on YOUR Priorities"

- You only have the time you have.
- You have less actual time available than your schedule tells you (interruptions, additions, transitions)
- Everything takes longer than you think it will.

Step 5b: "Consolidate"

- Work from your sorted, prioritized task list (which would include annual goals)

Step 5c: "Purge Down to the Limits of the Container" = TIME

- Accept the reality of your available time. Look at what is in your woven and will list, what is due this month (also woven & will), do these align with your goals? Make choices, not reactions.

Use this for when working on your priorities AND/or when determining where in the funnel it goes

Bonus Tip: Email Reference Into Storage

My use case

Creating a new budget for History Department. Accumulated many emails related to the budget.

I wanted to keep the information, have it easily findable in relation to the line in the spreadsheet it was about, but I wanted to spend the least amount of time on this as possible.

(Inserting into spreadsheet is NOT effective)

Solution

- ❑ Created a new sub-folder in this year's budget folder "reference emails"
- ❑ Click and drag each new reference email into that folder
- ❑ Click on the title (to edit), home key (to start of line), add #. (following on from the previously numbered email which is oh so conveniently right above this one)
- ❑ In spreadsheet, in the "reference email" column, type in number of the email
- ❑ Return to outlook and delete or otherwise archive the email

Scheduling Tips

Gary Chan, Manager, Help Desk & AV Support, Arts
ISIT

Streamline Your Personal Scheduling with MS Bookings

Benefits of MS Bookings

- Eliminate back and forth emails
- Protect your time with custom availability and buffer times
- Respects your FASmail calendar's availability, no double booking
- Optionally add your personal calendar (Google, iCloud) to FASmail calendar so you can't be booked when you are slurping \$1.75 oysters at Joe Fortes for Happy Hour
- Available August 18 via outlook.office.com/bookings

Use Cases

- Office hours for instructors and TAs
- Interviews for job candidates
- Career mentoring
- Program advising
- Writing centre
- Tutoring

Creating a Personal Bookings Page

UBC

Bookings

Lightbulb icon, Gear icon, Question mark icon, CG icon

< Work Learn Interview for Arts ISIT

Share icon Share, Delete icon Delete, Save icon Save

Edit meeting type

Calendar icon 17

Work Learn Interview for Arts ISIT

Tag icon

+ Category ▾

Menu icon

60 minutes online exam and interview using Teams. Webcam, mic and screen sharing required.

Location icon

Location

Toggle switch (on), Teams meeting icon Teams meeting

Clock icon

1 hr ▾


Lock icon

Public
These will appear on your booking page


Private
Only people with a booking link can view this


Setting Custom Availability

Schedule customization ⓘ


 Use custom availability hours ▾ [See regular meeting hours](#)

☒ Only during the following date range



Start *
2025-08-07 

End (inclusive) *
2025-08-19 

Sunday	Not bookable		+	
Monday	10:00 AM ▾	4:00 PM ▾	×	+
Tuesday	10:00 AM ▾	4:00 PM ▾	×	+
Wednesday	10:00 AM ▾	4:00 PM ▾	×	+
Thursday	10:00 AM ▾	4:00 PM ▾	×	+
Friday	10:00 AM ▾	4:00 PM ▾	×	+
Saturday	Not bookable		+	

 Hide advanced options

Setting Buffer and Lead Time

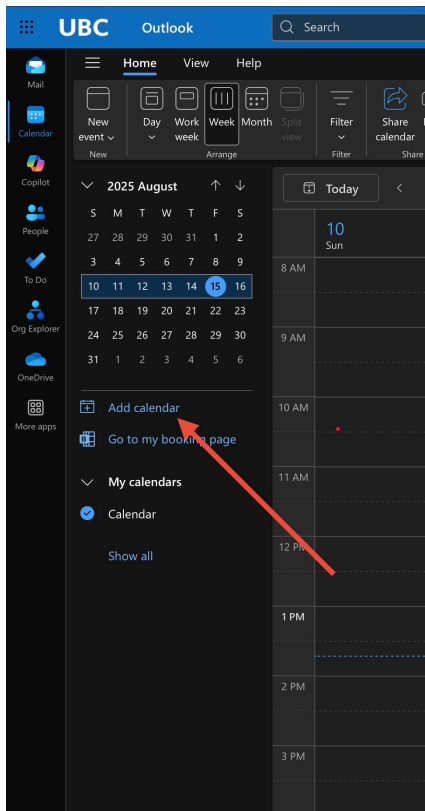
	Buffer time before meeting	15 mins
	Buffer time after meeting	15 mins
	Limit start time to	15-min intervals
	Minimum lead time	8 hrs
	Maximum lead time	14 days

Buffer • 15 mins

Work Learn Interview for Arts ISIT • 60 mins

Buffer • 15 mins

Add Your Personal Calendar to FASmail



General

Add calendar

Import & export

Settings for my calendars

Home

Calendar settings

Access permissions for events

Shared with

Event notifications

Public URL to this calendar
`https://calendar.google.com/calendar/embed?`

Use this URL to access this calendar from a web browser

Embed code
`<iframe src="https://calendar.google.com/cal`

Use this code to embed this calendar in a web page.
You can customize the code or embed multiple calendars.

Customize

Public address in iCal format
`https://calendar.google.com/calendar/ical/` `%40gmail.com/public/basic.ics`

Use this address to access this calendar from other applications.

Add calendar

Subscribe from web

Recommended

Edit my calendars

Create blank calendar

Add from directory

Subscribe from web

Upload from file


Paste the url for the calendar you would like to subscribe to below

Example: `webcal://www.contoso.com/calendar.ics`

Import

What They See

Choose a meeting type

 **Work Learn Interview for Arts ISIT**
1 HR
60 minutes online exam and interview using Teams.
Webcam, mic and screen sharing required.

Available times

2025 August

S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today

Tuesday, August 19

12:15 PM	✓
12:30 PM	✓
12:45 PM	✓
1:00 PM	✓
1:15 PM	✓
1:30 PM	✓

Next >

✓ You are available

≡

🌐



Scheduling Poll in FASmail Calendar

Benefits of Scheduling Poll

- No more “What time works for everyone” email chain that drags on for days
- Auto schedule when consensus is reached, or manually pick the time from your dashboard
- Internal and external friendly
- Tentative holds protect your proposed time until poll is finalized

Use Cases

- Department meetings
- Thesis or search committees
- Capstone presentations
- Conference planning across institutions

Starting a Scheduling Poll

Sending a Scheduling Poll

Left Panel (Configuration):

- Send:** [Send] [v]
- Add a title:** [Teams meeting]
- Attendees:** changary@me.com, garychan@me.com [Optional]
- Time:** 2025-08-22, 3:00 PM to 4:00 PM [Make recurring] [All day]
- Find a Time:** [Find a Time >]
- Add a room or location:** [In-person event]

Calendar View: Fri, 2025, Aug 22. 3:00 PM - 4:00 PM (You are available)

Right Panel (Scheduling poll):

- View all your polls:** [View all your polls]
- Time zone:** (UTC-08:00) Pacific Time (US & Canada)
- Duration:** 01:00 [Meeting hours: On]
- Date:** 2025-08-15
- Sort by:** Availability
- Selected Times:**
 - 02:00 PM (1 person)
 - 02:30 PM (1 person)
 - 03:00 PM (1 person)
- Bottom:** 2 times selected [Next]

Scheduling Poll Options

Scheduling poll

Selected times

Friday, August 15

2:00 PM

3:00 PM

Location

Please enter a location.

☒ Teams meeting

Manage poll settings

- ☒ Schedule when attendees reach consensus
- ☒ Hold selected times on my calendar
- ☒ Notify me about poll updates
- ☐ Require attendees to verify their identity
- ☐ Lock poll for attendees

← Back

Create poll

What They See

Scheduling poll

? g

Vote: Chan, Gary | changary@me.com | garychan@me.com

🕒 1 hour duration

📍 No location provided

📅 2 options provided

🌐 (UTC-08:00) Pacific Time (US & Canada) ▼

Show availability

📅 Scheduling poll

Choose times you prefer or are available

Friday, August 15, 2025

2:00 PM

📅 Prefer

No votes

✓ Yes

1 vote

✗ No

No votes

3:00 PM

📅 Prefer

No votes

✓ Yes

1 vote

✗ No

No votes

+ Propose another time

How others voted

Chan, G... changar...

✓

?

✓

?

Vote

Organizer

Chan, Gary

Required Attendees

✎ changary@me.com

✎ You (garychan@me.com)

+ Add required attendee

Optional Attendees

+ Add optional attendee

What You See

Hi,

Your poll has a new vote from garychan@me.com



Scheduling poll

Vote: Chan, Gary | changary@me.com | garychan@me.com



(UTC-08:00) Pacific Time (US & Canada)



1 hour



2 votes of 3

View poll

View all your polls

Friday, August 15
2:00 p.m.

Send

♥ Prefer: 0 ✓ Yes: 1 ✗ No: 1

Chan, Gary	Required	✓ Yes
garychan@me.com	Required	✗ No

Friday, August 15
3:00 p.m.

Send

♥ Prefer: 0 ✓ Yes: 2 ✗ No: 0

Chan, Gary	Required	✓ Yes
garychan@me.com	Required	✓ Yes

When Consensus is Reached

Hi,

Your poll has reached consensus! The meeting has been scheduled and an invite was sent to all attendees.



Scheduling poll

Vote: Chan, Gary | changary@me.com | garychan@me.com



(UTC-08:00) Pacific Time (US & Canada)



Friday, 15 August 2025 15:00



1 hour

[View poll](#)

This email was auto-generated by scheduling poll.



Setting Work Hours and Location

Benefits of setting work hours and location

- Colleagues can see if you are in-person or remote before scheduling meetings
- Outlook's scheduling assistant will recommend in-person or virtual based on attendee location
- Set different work hours and work location for each day

Setting Work Hours and Location

Settings

Account

General

Mail

Calendar

People

Copilot

View

Events and invitations

Weather

Events from email

Shared calendars

Customize actions

Bookings with me

Work hours and location

Work hours and location

Get a handle on your week and help others plan meetings that work better for your schedule.

Your work hours time zone: (UTC-08:00) Pacific Time (US & Canada).

☐ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat

Mon	10:00 AM	to	4:00 PM	Office	+
Tue	10:00 AM	to	4:00 PM	Office	+
Wed	10:00 AM	to	4:00 PM	Office	+
Thu	10:00 AM	to	4:00 PM	Remote	+
Fri	10:00 AM	to	4:00 PM	Remote	+

☒ Show work location on my calendar ⓘ

Share your location

People in my organization

Can view all details (building, desk, etc.)

Scheduling Assistant Stepping In

[In-person] - Meeting

Event Scheduling Assistant

Response options ▾ Attendees

Busy 15 minutes before ▾ Options

Categorize Private ▾ Tags

Scheduling poll FindTime

Send to OneNote Send to OneNote

My Templates My Templates

Send ▾

[In-person] ☒ Teams meeting

Serrano, Ricardo ✕ Lam, Angela ✕ **Optional**

2025-08-15 3:30 PM to 4:00 PM ☒ Make recurring ☐ All day

[Find a Time >](#)

Add a room or location ☒ In-person event

Type / to insert files and more

3:30 PM - 4:00 PM Everyone is available

4 PM Block

5 PM

6 PM

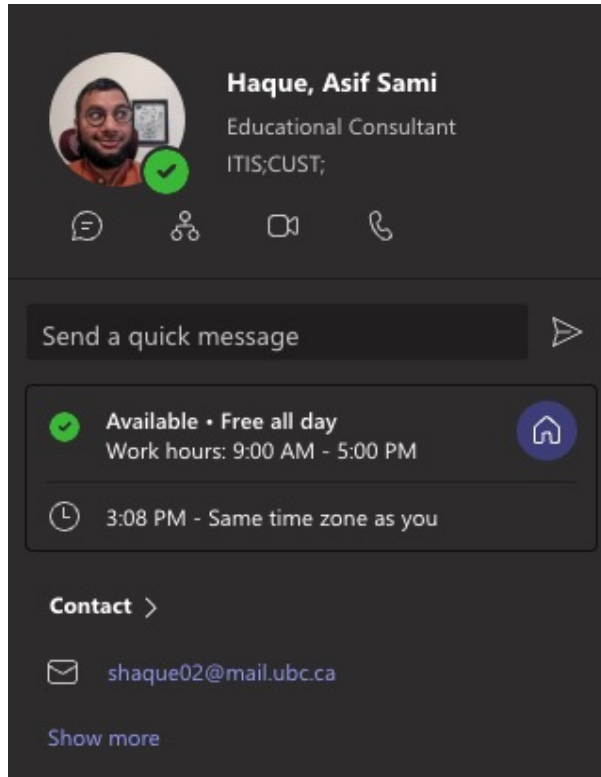
7 PM

8 PM

9 PM

You and Lam, Angela are remote

View Colleagues Info on Teams



File Management Tips

Cara Chuang, Manager, Projects & Administration, Arts ISIT

Intro to File Management

(Digital) file management is the practice of organizing, storing, naming, and maintaining digital files in a way that makes them easy to find, access, and share.

Benefits of effective file management:

- supports collaboration
- reduces duplication
- saves time

Today, we'll discuss two approaches to file management:

- **Knowledge base** for documentation (eg. guides, how-tos, information that you reference)
- **File repository** for archival (eg. invoices, records) and collaborative files (eg. working documents)

Why bother?

Symptoms of ineffective file management:

- "Where did I save that again?"
 - **Knowledge is stored in multiple places, making it hard to find**
- "This looks like an old copy/Which version are we using again?"
 - **Knowledge is duplicated, causing confusion**
- Someone asks you, "How do I do this again?"
 - **Knowledge is stored in your brain - you are the only access point**
- You ask yourself, "How did I do this again?"
 - **Knowledge isn't stored – you are re-inventing the wheel every time**

Knowledge Base - AIR

We use AIR as our knowledge base to host our documentation

Benefits of AIR:

- Website structure makes it easy to navigate (menu)
- Ability to link (point to original source)
- Posts can be viewed in an archive (search/filter with categories)
- Access control
 - Automatic
 - Granular control (groups) for confidentiality

Knowledge Base Tips - ABC's

Tips for building your knowledge base:

- **Audit:** what kinds of formal or informal documentation do you already have?
- **Brainstorm:** Based on the existing and new documentation, what themes or groupings arise?
- **Compile and Categorize:** Transfer all your documentation to one place. Then, sort and apply categories.
- **Document:** If you come across a process or reference that would be helpful to the team, add it to your knowledge base!
- **Edit:** As processes change, go back and edit your documentation to ensure it remains relevant.

Knowledge Base Tips - Templates

Templates can jump-start your documentation by making it more accessible to create and providing a consistent structure.

For example, our documentation includes:

- Description
- Step-by-step instructions
- Helpful links
- Escalation/who to ask for help

In AIR, you can create templates with different headings and prompts so people can "fill in the blanks" to write new documentation.

File Repository - MS Teams/Sharepoint

We use MS Teams/Sharepoint as our file repository for storage

Benefits of MS Teams/Sharepoint:

- Instant collaboration (open in browser)
- Ability to link files and folders
- FIPPA compliant
- Access control
 - Automatic (based on channel membership)
 - Granular control (by groups or individuals) when required for confidentiality

File Repository Tips – Build your structure

Tips for building your knowledge base:

- **Audit:** what kinds of files do you already store? What kind of working documents do you have?
- **Brainstorm:** Based on the types of content and access requirements, what folder structure makes sense?
- **Create your folder structure:** For a clean start, create a new channel in your Teams instant, then create folders.

Tips for creating your folder structure:

- Access should be as open as possible, and then restricted based on confidentiality/security
- Group information thematically and by access. It's easier to apply access control to a folder – then the settings will apply to all files within that folder.
- Certain content follows a retention schedule. You can create folders for each year, so it's easy to tell what needs to be kept and what can be archived/deleted.

File Repository Tips – Naming your files

The right naming convention is the one that your team will understand and follow!

But, how do we avoid "Project-draft-final-v1-updated-signed-final-final"?

Tips for naming conventions:

- Go from general to specific (eg. Project-name_document-title_version)
- Avoid special characters, which can cause issues in some systems (stick to letters, numbers, underscores _ and hyphens -, while avoiding : / \ : * ? " < > |)
- Use tags/IDs to differentiate similar types of documents when using the search function.
 - Eg. Instead of ten different "performance-plan-2025", differentiate with names "Cara-Chuang-performance-plan-2025"

From square to round wheels

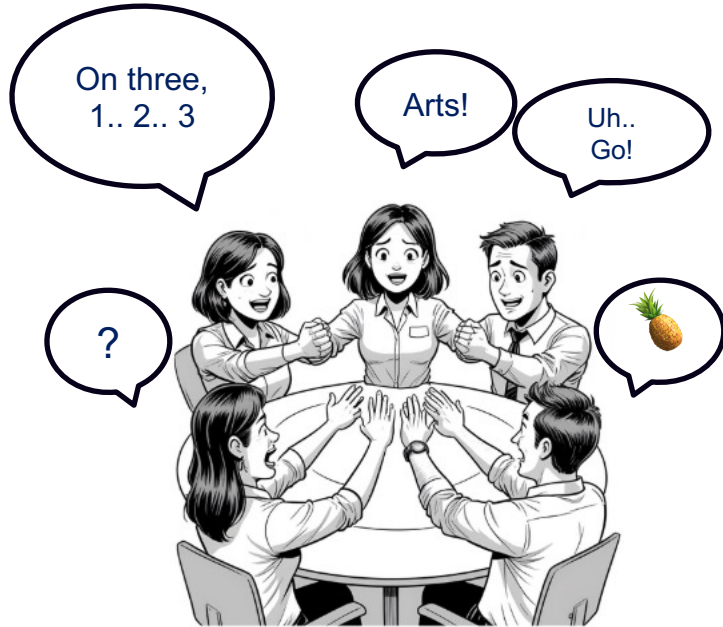
Implementing file management is an investment – it takes both time and teamwork.

- Start smaller to build momentum
 - Clean as you go (to build habits)
 - Schedule "spring cleaning": dedicate time to deleting old files, reviewing access, and updating documentation
- Everyone can (and should) help!
 - Experienced staff have knowledge stored in their brains – documenting it eases their burden of training or being the "go to" person
 - Newer staff have fresh eyes, and can identify gaps and help clarify processes – empower them to edit and create their own documentation

Project & Task Management Tips

Daniel Pugh, Associate Director, Arts ISIT

From Individual to Group Tasks



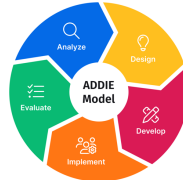
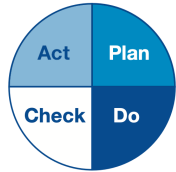
Potential challenges

- Work is ambiguous
- Responsibility unclear
- More complex tasks
- Dependencies

Project (Collaboration) Management Tips

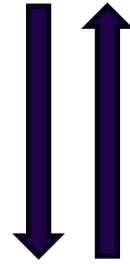
When?

- Research projects
- Event planning
- Faculty searches
- Course scheduling



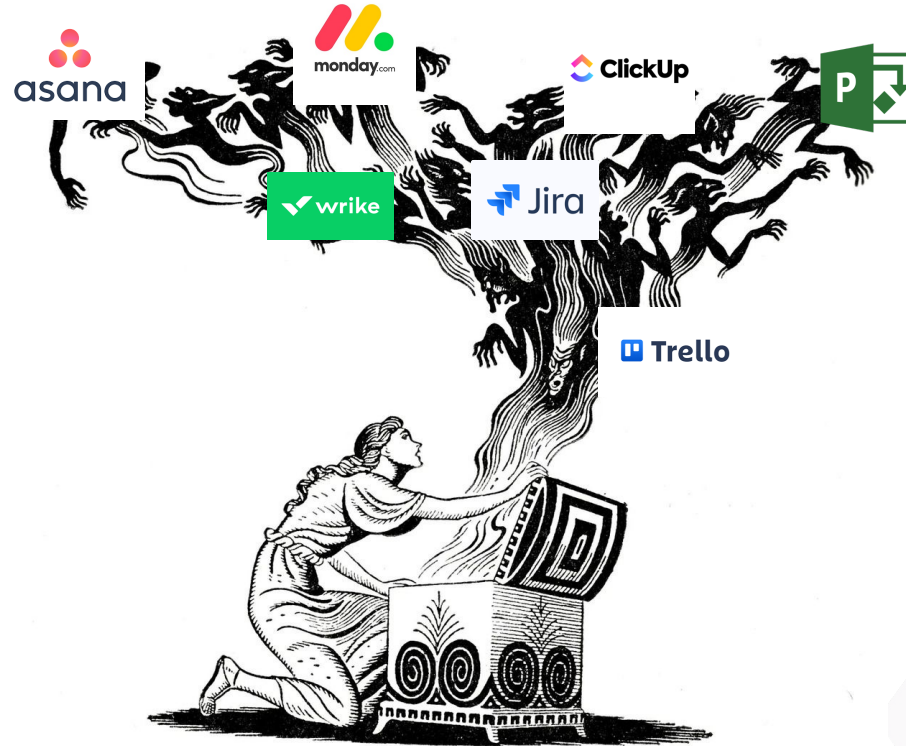
Take a consistent approach

- What are we doing? Why?
- How are we doing it? When? Who?
- Let's Do it! How are we doing?
- Did we achieve what we set out to?



S	Specific: Define a clear, specific goal.
M	Measurable: Make sure you can track progress.
A	Attainable: Create a goal that is realistic.
R	Relevant: Ensure your goal aligns with the organization.
T	Time-bound: Assign a target date to keep accountable.

Tools for Collaboration Management



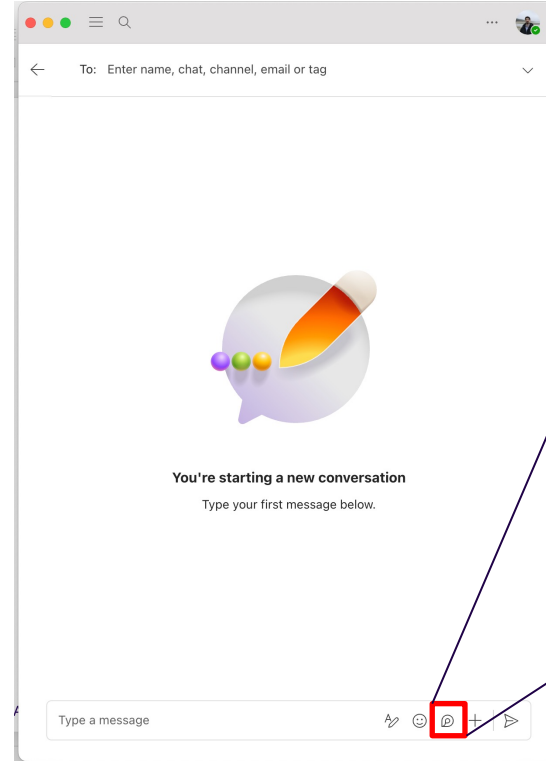
Microsoft Loop

Benefits

- Quick and easy to setup
- Allows for S.M.A.R.T. tasks
- Integrated with Microsoft 365
- FIPPA compliant

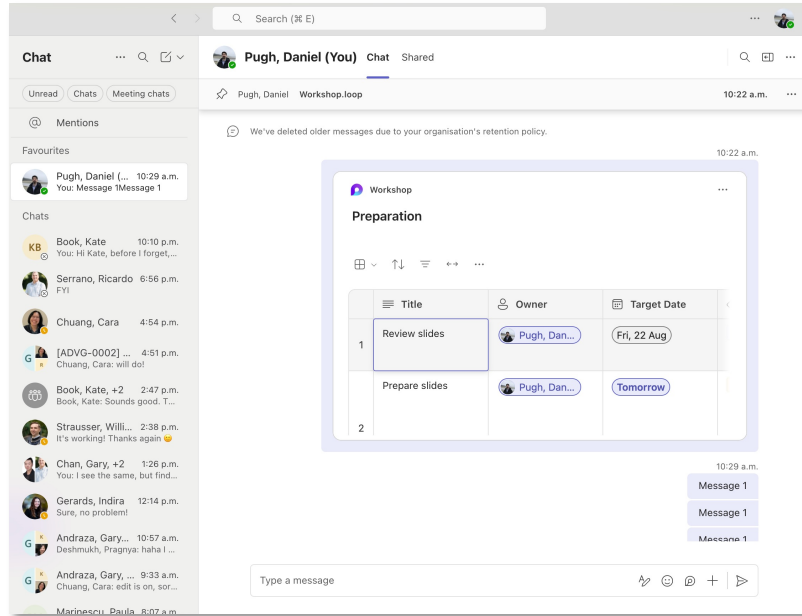
Limitations

- Limited hierarchy for pages (projects)
- One-to-one relationship for cards (tasks)
- Lack of reporting, dashboards, etc.

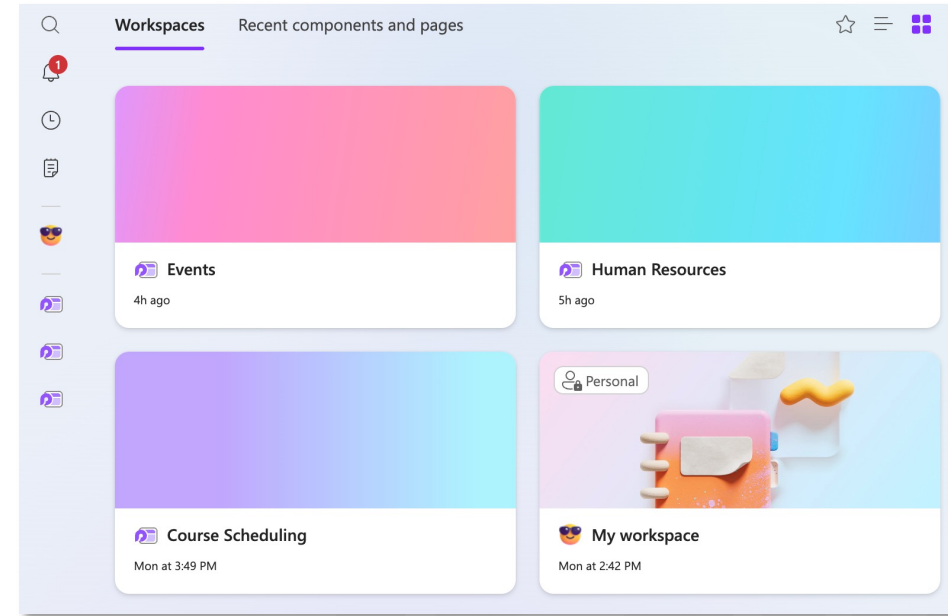


Microsoft Loop - Demo

MS Teams (Chat)



Browser (loop.cloud.microsoft)



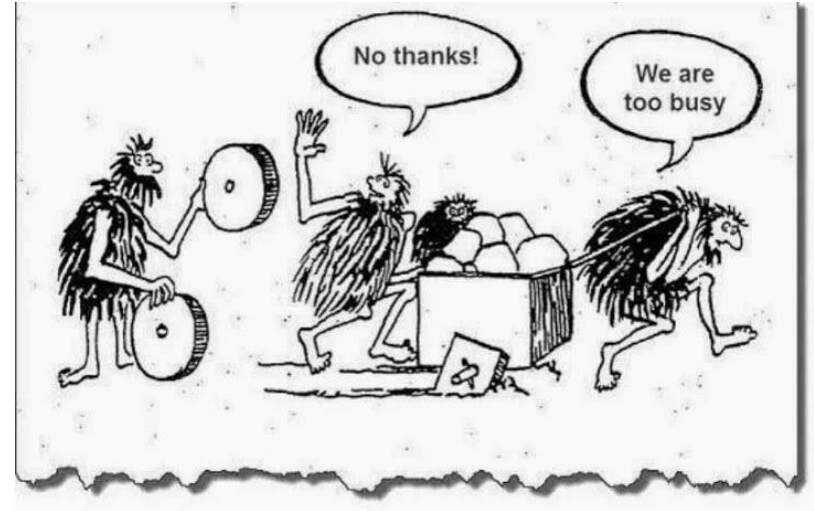
Benefits of Collaboration Management

- More consistent results that align with expectations
- Greater confidence with less back-and-forth
- Improved transparency/awareness
- More tasks completed on time
- Better continuity

Audience Questions & Discussion

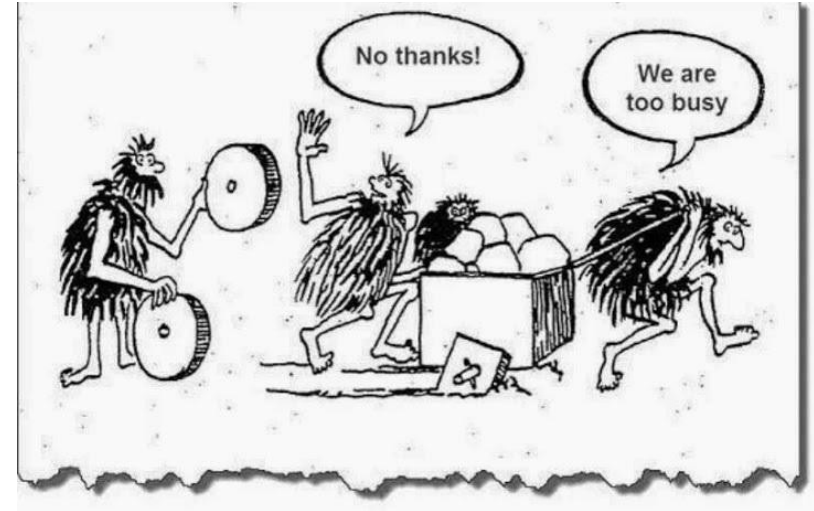
Audience Questions

Do you have any questions for our speakers regarding the topics from today?



Group Discussion

- What has been the most effective strategy or piece of technology you've used when performing tasks?
- Do you have any tips for using the tools mentioned today that we have not addressed?
- Do you recommend any other tools for speeding up your daily work?





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Faculty of Arts