GETTING DIGITALLY ORGANIZED 2008

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THINK FIRST
THINK FIRST

ORDER FLOWS NATURALLY
THREE PART ORDER + SKILLS

RENAMING
MAKING FOLDERS
MAKING SHORTCUTS
SMART NAMING
KEYBOARD SHORTCUTS
SORTING AND SEARCHING
AND MORE!
BUT FIRST...

LET'S MAKE SURE YOUR DIGITAL SPACE FITS YOUR NEEDS
THE DOCK

I RECOMMEND:

- PUTTING IT ON THE SIDE
- ONLY KEEP THE MOST USED SHORTCUTS
- DRAG THE OTHERS OFF AND WATCH THEM POOF AWAY
- (WE’LL ADD THINGS TO THE DOCK LATER)
- USE SPOTLIGHT INSTEAD FOR MOST THINGS
SYSTEM PREFERENCES

- SET DESKTOP BACKGROUND
- TIP: SET SCREENSAVER FOR MORE THAN 1 PERIOD

- SLEEP SETTINGS
- SET BATTERY & POWER CORD SEPARATELY
- TIP: SET SLEEP ON POWER CORD TO MORE THAN 1 PERIOD

- MOUSE & TRACKPAD SETTINGS...
- TIP: TWO-FINGERS ON TRACKPAD = SCROLLING

- TIP: YOU CAN ENABLE TAP-CLICKING

- TIP: TWO FINGERS ON TRACKPAD + CLICK = RIGHT-CLICK
NOW DOWN TO BUSINESS: YOUR E-MAIL
FIRST AND FOREMOST
YOUR INBOX SHOULD NOT BE YOUR TO-DO LIST
FIRST AND FOREMOST
YOUR INBOX SHOULD NOT BE YOUR TO-DO LIST

- IT'S NOT ALWAYS WITH YOU
- EACH E-MAIL ONLY VAGUELY REPRESENTS WHAT NEEDS TO BE DONE
- THAT MEANS THAT SOME INFO WILL ALWAYS BE NAGGING IN THE BACK OF YOUR MIND...
- ...WHICH TENDS TO INCREASE YOUR STRESS LEVEL
- IMPORTANT E-MAILS WILL GET LOST IN THE SHUFFLE!
LET'S THINK ABOUT THIS...

WHEN MAIL COMES IN, WHAT DO YOU DO* WITH IT?

- ACT ON IT
- DEFER ACTING ON IT
- DELEGATE IT
- DO NOTHING
- FILE IT
- DELETE IT

* Getting Things Done, by David Allen, and "Inbox Zero" by Merlin Mann www.43folders.com/izero
LET'S THINK ABOUT THIS...

WHEN MAIL COMES IN, WHAT DO YOU DO* WITH IT?

- ACT ON IT
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NOTE: ALL E-MAILS MUST END UP HERE SOONER OR LATER!

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THE E-MAIL LIFE CYCLE

E-mail

- Act on it
  - Reply
  - Set a reminder
  - Etc.

- Defer acting on it
  - Set a reminder to come back to it

- Delegate it
- Forward

- Do nothing

- File it
- Delete it
SKILLS YOU'LL NEED

ACT ON IT
REPLY
SET A REMINDER ETC.

DEFER ACTING ON IT
SET A REMINDER TO COME BACK TO IT

DELEGATE IT IT
FORWARD

DO NOTHING

FILE IT
DELETE IT
BEFORE WE GET TO THE SKILLS
ONE RECOMMENDATION...

E-mail

INSTEAD OF FREQUENTLY CHECKING YOUR E-MAIL...

SET TIMES DURING THE DAY TO PROCESS ALL THE E-MAIL IN YOUR INBOX

CLEAR THE INBOX* (IF POSSIBLE)

* "Inbox Zero" by Merlin Mann
www.43folders.com/izero
CREATING FOLDERS IN YOUR E-MAIL

THREE SCHOOLS OF THOUGHT

CREATE FOLDERS TO FILE TYPES OF E-MAIL
- MEMOS
- PARENT
- IEPs

CREATE FOLDERS TO FILE MAIL BASED ON URGENCY
- BY TODAY
- BY FRI
- END OF MONTH
- ARCHIVE

CREATE ONE FOLDER "ARCHIVE" AND USE SEARCH AND SORT FEATURES TO FIND OLD E-MAIL

MORE SKILLS!
SEARCH AND SORT E-MAIL

- CLICK ON A FOLDER
- CLICK A HEADER TO SORT (CLICK AGAIN TO REVERSE-SORT)
- OR USE THE SEARCH
CREATING E-MAIL FOLDERS

HOW-TO

- RIGHT-CLICK* THE INBOX
- CHOOSE "NEW FOLDER"
- NAME IT
- DONE!

* Or control-click, or two-finger click
CREATING E-MAIL FOLDERS HOW-TO

- RIGHT-CLICK* THE INBOX
- CHOOSE "NEW FOLDER"
- NAME IT
- DONE!

TIME TO PROCESS YOUR E-MAIL CLEAR THAT INBOX!

* Or control-click, or two-finger click
iCal Reminders

- Double-click a day
- Type in a description
- Double click again to set details...
- ...like the time
- ...and the alarm feature
SETTING RULES

FOR EXAMPLE...

HAVE MAIL FROM SPECIFIC ADDRESSES AUTOMATICALLY ROUTED TO A FOLDER

HAVE MAIL WITH SPECIFIC WORDS IN THE SUBJECT OR BODY AUTOMATICALLY ROUTED TO A FOLDER

HAVE MAIL AUTOMATICALLY FORWARDED TO ANOTHER ADDRESS AND THEN DELETED
SETTING RULES

HOW TO

1. CLICK TOOLS > RULES
SETTING RULES

HOW TO

1. CLICK TOOLS > RULES
2. CLICK "MAIL (EXCHANGE)"
SETTING RULES

HOW TO

1. CLICK TOOLS > RULES
2. CLICK "MAIL (EXCHANGE)"
3. CLICK "NEW"
1. CLICK TOOLS > RULES
2. CLICK "MAIL (EXCHANGE)"
3. CLICK "NEW"
4. NAME IT
SETTING RULES

HOW TO

1. CLICK TOOLS > RULES
2. CLICK "MAIL (EXCHANGE)"
3. CLICK "NEW"
4. NAME IT
5. SELECT THE CRITERIA
1. Click Tools > Rules
2. Click "Mail (Exchange)"
3. Click "New"
4. Name it
5. Select the criteria
6. Set what should happen when the criteria are met
USING CATEGORIES

EACH CATEGORY HAS A DISTINCTIVE COLOR

CAN BE USED IN CONJUNCTION WITH RULES

FOR EXAMPLE... MAIL FROM A SPECIFIC ADDRESS GETS CATEGORIZED AS "FAMILY" WITH A DISTINCT COLOR

YOU CAN EDIT THE CATEGORIES AND COLORS
USING CATEGORIES

HOW TO

1. CLICK EDIT > CATEGORIES

2. CREATE CATEGORIES THAT YOU CAN USE

3. GO BACK TO RULES AND ASSIGN CATEGORIES AUTOMATICALLY

4. YOU COULD ALSO CREATE BLANKET RULES FOR A GIVEN CATEGORY
NEXT UP:
DOCUMENTS
WE'LL LOOK AT...

FOLDER VIEWS AND SORTING
RENAMING & NAMING SCHEMES
SEARCHING FOR DOCUMENTS
SIMPLE VS COMPLEX FOLDER SYSTEMS
CREATING SHORTCUTS
FOUR DIFFERENT FOLDER VIEWS

ICON VIEW

LIST VIEW

COLUMN VIEW

COVER FLOW

FINDER WINDOW
ICON VIEW

ADVANTAGE
YOU CAN SEE SMALL PREVIEWS OF ALL FILES

DISADVANTAGES
CAN'T SORT
CAN'T SEE MUCH
EASY TO GET LOST IN FOLDERS
LIST VIEW

ADVANTAGES
- Can see details
- Sort by clicking headers
- Expand/collapse folders

DISADVANTAGES
- Can still get lost in folders
- No preview (but can hit spacebar to see big preview)
COLUMN VIEW

ADVANTAGE
CANT'T GET LOST IN FOLDERS
THE MOST INFO IN THE
LEAST SPACE

DISADVANTAGES
NO PREVIEW (BUT CAN HIT
SPACEBAR TO SEE BIG PREVIEW)
NO DETAILS (BUT CAN
HIGHLIGHT TO SEE DETAILS)
**COVER FLOW**

**ADVANTAGES**
ALL THE ADVANTAGES OF LIST VIEW PLUS INSTANT BIG PREVIEW

**DISADVANTAGES**
CAN GET LOST IN FOLDERS TAKES SOME GETTING USED TO
RENAME FILES & FOLDERS

CLICK ON THE NAME
*PAUSE*
CLICK AGAIN
START TYPING
SMART NAMING SCHEMES

THE MAC Sorts FILES ALPHABETICALLY

!@#$ ... 12345 ... AaBbCcDd ... YyZz

YOU CAN USE THAT TO PUT THE FILES IN THE ORDER YOU WANT
THINK BEFORE YOU NAME!

A FEW SECONDS OF THINKING BEFORE YOU NAME...

...CAN SAVE YOU MANY MINUTES OF SEARCHING LATER
COLORING FILES/FOLDERS

ONE MORE WAY TO MAKE THINGS EASY TO FIND...

RIGHT-CLICK* A FILE OR FOLDER

CHOOSE A COLOR LABEL

(YOU CAN PICK COLORS BASED ON CATEGORIES, TOPICS, ETC.)

* Or control-click, or two-finger click
SEARCHING FOR THINGS: 3 WAYS

SPOTLIGHT

FINDER SEARCH

SMART FOLDERS
SPOTLIGHT SEARCH

ADVANTAGES
QUICK LIVE UPDATING
SEARCHES NAMES AND CONTENTS
SEARCHES EVERYTHING

BUT THESE CAN BE DISADVANTAGES AS WELL!
LIVE UPDATING - SOMETIMES THINGS CHANGE BEFORE YOU CAN CLICK
SEARCHES EVERYTHING - NOT VERY TARGETED
FINDER WINDOW SEARCH

The screenshot shows a file search in a Finder window on a Mac. The search bar is set to search for files containing the word "phys". The file list includes various files and folders, such as "1 physics", "physSports-Pole Vault.m4v", and "GarageBandProject". The window is set to search "This Mac" and "Documents" with "Last Opened" as the sort order.
FINDER WINDOW SEARCH

ADVANTAGES
- LIVE UPDATING
- SEARCHES NAMES OR CONTENTS OF FILES
- SEARCHES CURRENT FOLDER OR EVERYTHING
- SHOWS PATH TO HIGHLIGHTED ITEM

ADD CRITERIA TO LIMIT SEARCH
SIDEBAR SMART FOLDERS

ADVANTAGES
CONVENIENT FOR RECENT THINGS
(ESSENTIALLY A TIME-BASED FINDER SEARCH)
CREATING FOLDERS

1. OPEN UP A FINDER WINDOW
2. NAVIGATE TO WHERE YOU WANT THE FOLDER
3. CLICK THE GEAR; CHOOSE "NEW FOLDER"
4. TYPE NAME IMMEDIATELY
SIMPLE VS COMPLEX FOLDER STRUCTURES
(TWO EXTREMES)
SIMPLE FOLDER STRUCTURES

JUST THROW EVERYTHING IN ONE FOLDER
RELY ON SEARCHES, COLORS & SORTING TO FIND THINGS

ADVANTAGES
ZERO SET-UP TIME
SAVING TAKES NO THOUGHT

DISADVANTAGES
TOO MESSY FOR MOST PEOPLE
IF YOU HAVEN'T NAMED THINGS CAREFULLY,
FINDING THINGS CAN BECOME A NIGHTMARE!
COMPLEX FOLDER STRUCTURES

CREATE ORDERED FOLDERS & FOLDERS WITHIN FOLDERS

ADVANTAGES
APPEARS ORGANIZED
EASY TO NAVIGATE
NAMING OF FILES IS NOT SO IMPORTANT

DISADVANTAGES
SAVING TAKES THOUGHT
TAKES TIME TO NAVIGATE
CAN BECOME TOO COMPLEX
MIGHT ACCIDENTALLY CREATE THE SAME FOLDER TWICE!
SIMPLE VS COMPLEX FOLDER STRUCTURES

YOU WILL MOST LIKELY BE SOMEWHERE IN BETWEEN AND YOU MAY END UP MIXING AND MATCHING
ONE MORE BIT OF ADVICE...

CLEAR THAT DESKTOP OFF!

THE DESKTOP IS A NICE TEMPORARY WORK SPACE FOR FILES...

...BUT NOT IF IT'S A MESS
TIME TO GET THOSE FILES SORTED OUT!

HELPFUL SHORTCUTS AND TIPS

- WHEN MOVING FILES, HOVER OVER A FOLDER AND IT WILL "SPRING" OPEN
- APPLE-DELETE = PUT FILE IN TRASH
- APPLE-N = NEW WINDOW
- APPLE-S = SAVE
- APPLE-W = CLOSE WINDOW
- APPLE-Q = QUIT PROGRAM
- APPLE-X = CUT
- APPLE-C = COPY
- APPLE-V = PASTE
- APPLE-SPACE = OPEN SPOTLIGHT
SHORTCUTS: 4 DIFFERENT KINDS

- Dock Shortcuts
- Sidebar Shortcuts
- File/Folder Aliases
- Smart Folders
DOCK SHORTCUTS

Good for shortcuts to programs but not so good for shortcuts to folders. Better not to crowd the dock.

Open applications folder.

Drag icon over to dock.

Let go when other icons move over.
SIDEBAR SHORTCUTS

GOOD FOR SHORTCUTS TO FOLDERS ESPECIALLY PLACES YOU SAVE TO OFTEN

DRAG FOLDER OVER TO THE SIDEBAR

DO NOT LET GO UNTIL YOU SEE A LINE APPEAR BETWEEN THE SHORTCUTS

YOU CAN CUSTOMIZE THE DEFAULTS BY CLICKING FINDER > PREFERENCES
SMART FOLDERS CAN BE CREATED BY DOING FINDER SEARCHES AND SAVING CREATES A FOLDER OF "SHORTCUTS" TO FILES/FOLDERS THAT FIT THE CRITERIA AUTOMATICALLY UPDATED

CAUTION: DELETING THE FOLDER DOES NO HARM BUT DELETING THE "SHORTCUTS" INSIDE DELETES THE ORIGINALS
YOU CAN CREATE SHORTCUTS TO INDIVIDUAL FILES OR FOLDERS - "ALIASES"
RIGHT-CLICK* THE FILE/FOLDER; CHOOSE "MAKE ALIAS"
DRAG THE ALIAS WHEREVER YOU WANT IT
DELETING THE ALIAS DOES NO HARM

* Or control-click, or two-finger click
WE'LL LOOK AT...

SAVING BOOKMARKS
MANAGING BOOKMARKS
USING BROWSER HISTORY
SETTING BROWSER HOMEPAGE
CREATING SHORTCUTS TO WEBSITES
SETTING THE HOMEPAGE (SAFARI)

CLICK SAFARI > PREFERENCES
SET HOMEPAGE

SETTING THE HOMEPAGE (FIREFOX)

CLICK FIREFOX > PREFERENCES
SET HOMEPAGE

Home Page: http://www.mrmont.com
SAVING BOOKMARKS: 3 WAYS

- BOOKMARKS MENU
- BOOKMARK BAR
- CLICKABLE SHORTCUT
1. CLICK AND HOLD THE ICON NEXT TO THE WEB ADDRESS
2. DRAG OUT TO DESKTOP AND LET GO
3. MOVE THE SHORTCUT WHEREVER YOU WANT IT
1. Click and hold the icon next to the web address
2. Drag down to bookmark bar and let go
3. Name it
BOOKMARKS MENU

- Show All Bookmarks
- Add Bookmark to Menu

CLICK TO ORGANIZE BOOKMARKS INTO FOLDERS

CLICK TO ADD BOOKMARK TO MENU
CAN'T FIND THAT WEBSITE YOU WENT TO YESTERDAY? USE YOUR BROWSER HISTORY!
BROWSER HISTORY (SAFARI)

WEBSITES YOU'VE BEEN TO VERY RECENTLY

WEBSITES YOU'VE BEEN TO IN THE LAST WEEK (OR MORE)
BROWSER HISTORY (FIREFOX)

WEBSITES YOU'VE BEEN TO VERY RECENTLY

CLICK TO GET TO WEBSITES YOU'VE BEEN TO IN THE LAST WEEK (OR MORE)
REMEMBER ORGANIZATION BEGINS...