

A workflow that most probably isn't yours

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A workflow that most probably isn't yours

My workflow principles

design, tools, implementation

Modern tools and ecosystems prescribe workflows

instead of letting **you** choose tools that fit the way **you** like to work

e.g. Outlook calendar invites (email inbox as an agenda), Google calendar (tasks/events)

Life of an academic

Research (incl software development)

Proposals

Reviews and feedback

Teaching

Examinations

Administration

Advising

Conferences, workshops & seminars

Self-development

Outreach and communication

Relaxation & Reflection

Proposals

Outreach and communication

Research

Reviews and feedback

Advising

Relaxation & reflection

Self-development



Conferences, workshops & seminars

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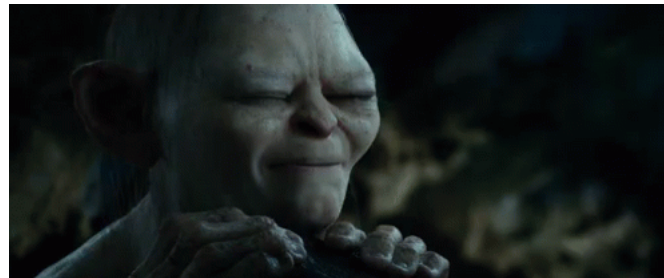
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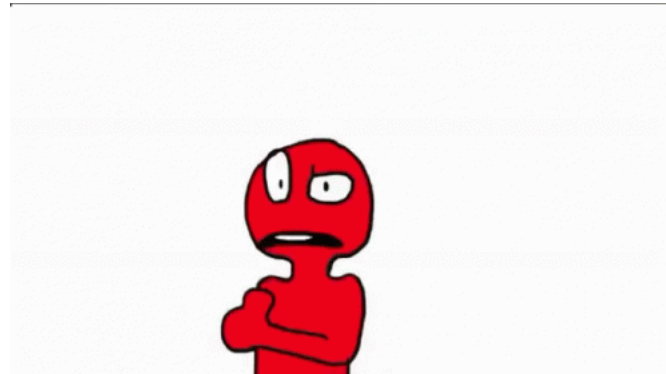
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What does a workflow do?

Manage daily input

ideas, notes, meetings, errands, correspondence, hands-on work, breaks, relaxation

Handle commitments

collaborations, conference/journal deadlines, editorial work, administration, ...

Keep track of progress and self-development

progress with project/software/thesis, waiting others to do stuff, self-learning, ...

Set goals

short-, mid-, long-term

Why have it?

 Make time count

 Prioritize and focus

 Form habits

 Minimize stress

 Achieve goals

Assumptions

Brain's noise-to-signal ratio is high
at least higher than one would hope...

Human memory ultimately fails as an agenda

No workflow is good for everybody & forever
personal circumstances & work requirements, different priorities & problem solving strategies

Parsimonious workflows are the best
workflows taking long time to operate, complicated information retrieval, bottlenecks

Definitions

Todo

something that needs completion, you have a plan for

e.g. waldi CRAN release, improved estimation in LMM, YRM seminar, kitchen renovation, ...

Task

a natural and manageable next step in a todo, best described starting with a verb

e.g. write vignette, carry out simulation study, write introduction, buy sink

Context

where todo items arise

e.g. home, work

Workflow processes



Categorize, refile & retrieve

e.g. distinguish between todo types (research, admin) and contexts, etc.



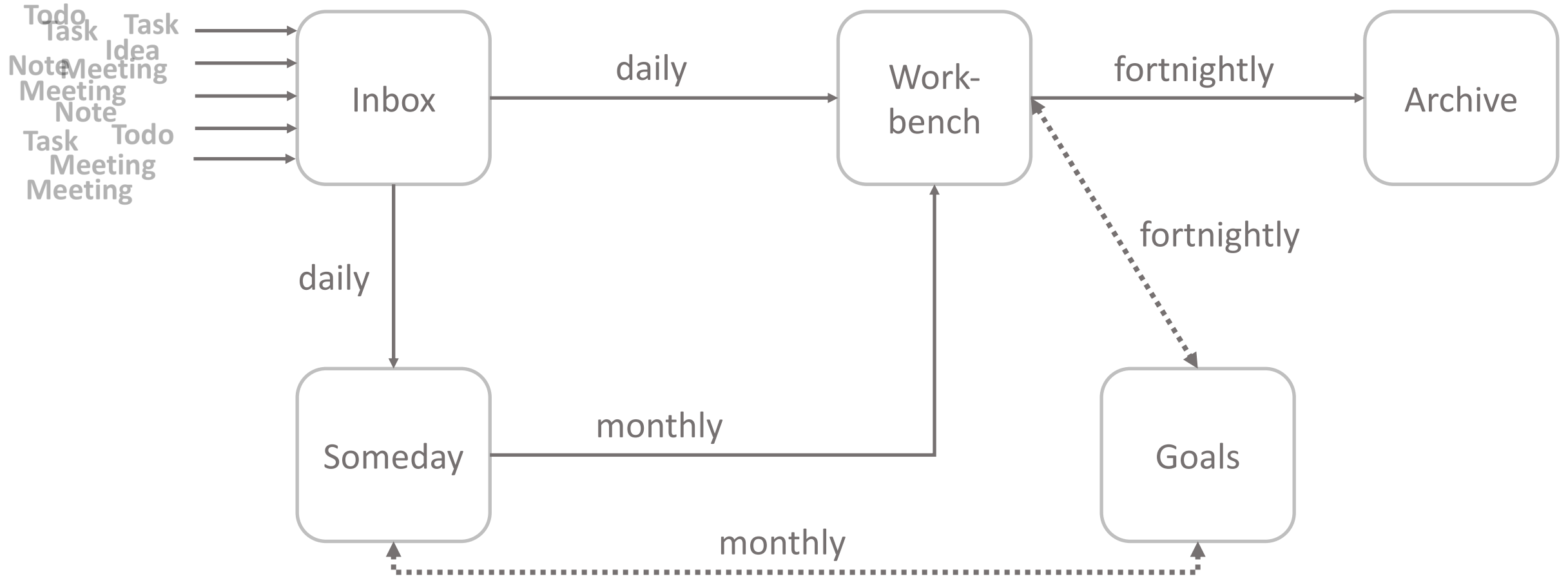
Prioritize

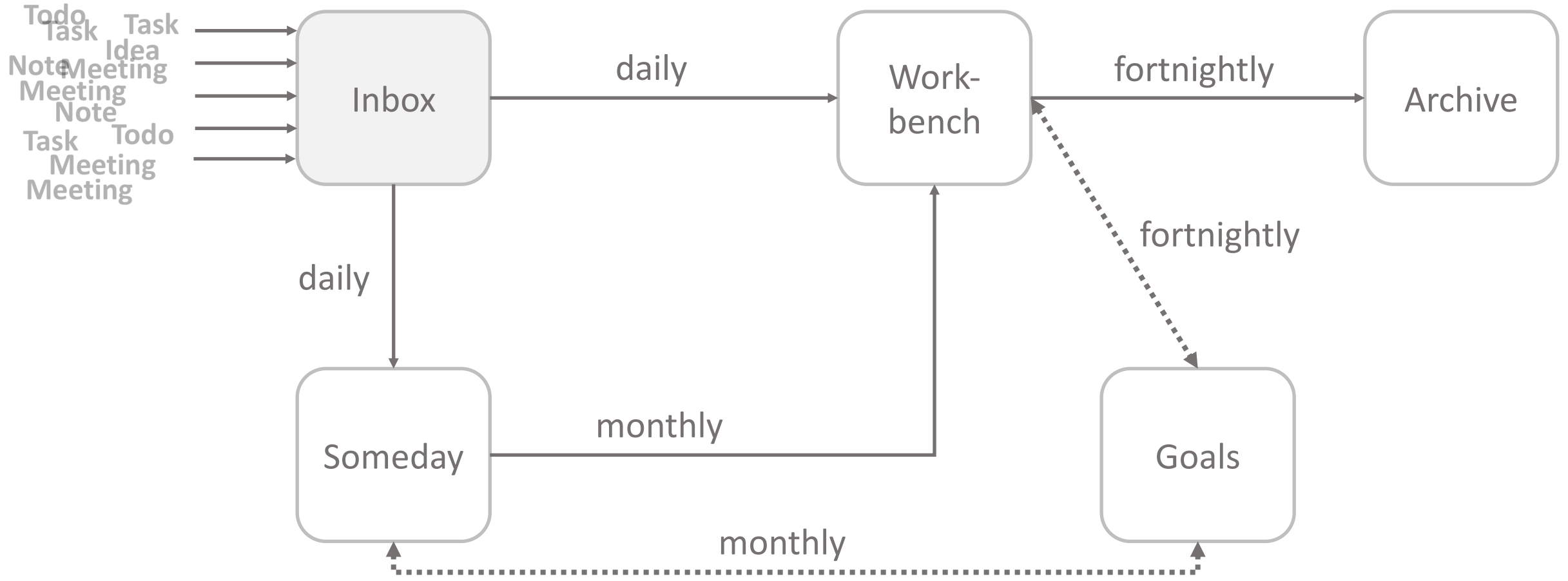


Manage time



Consolidate activity





Inbox

Collects signal (and noise) from your brain & others

e.g. ideas, tasks, errand, meetings, notes, email, impromptu visits, phone calls, ...

Commit entries to it

during the day

Entries from **inbox** are categorized to **workbench** or **someday**

end of the day

Needs to be accessible; not necessarily tidy

- Tasks

- Meetings

- MEETING with Jake Pegden :meeting:...
- MEETING with Asma :meeting:...
- MEETING with Nicola :meeting: ...

- Notes

- NOTE Priorities :note:...
- NOTE Impact evidence and work :note:...
- NEXT Respond to PhD Supervision in Statistics...
- NOTE Principles for PhD supervision :note:...
- NOTE Automatic replies :note:...
- NOTE Warwick-Turing Post advert 2017 :note:...
- NOTE House hunting emails :note:...
- NOTE Beta regression references :note:...
- NOTE brglm2 examples :note:...

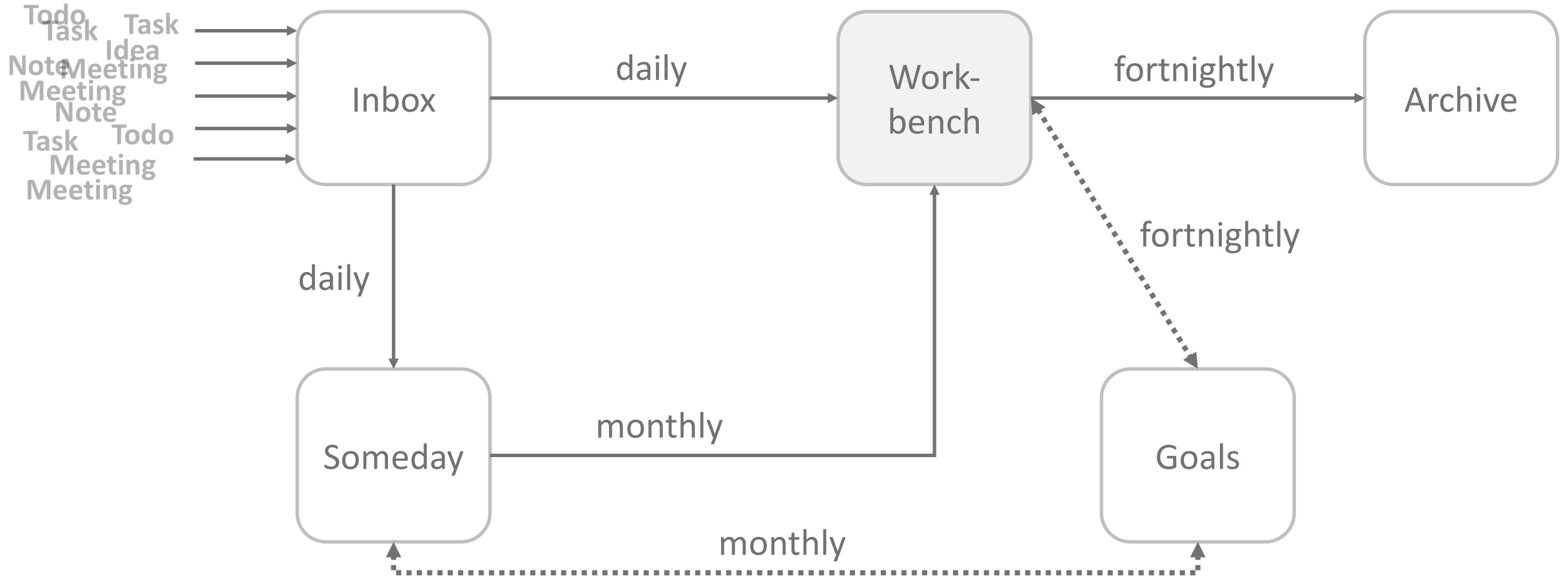
- Ideas

- Breaks

- BREAK for lunch :break: ...

- Emails

- NEXT Respond to Re: reference ...
- NEXT Respond to Provisional list of roles, green=updated ...



Workbench

Context-specific and dedicated to ongoing projects

Entries from **inbox** are categorized to **workbench**
daily until project completion, cancellation or abandonment

Entries from **someday** are moved to **workbench**
monthly, as necessary

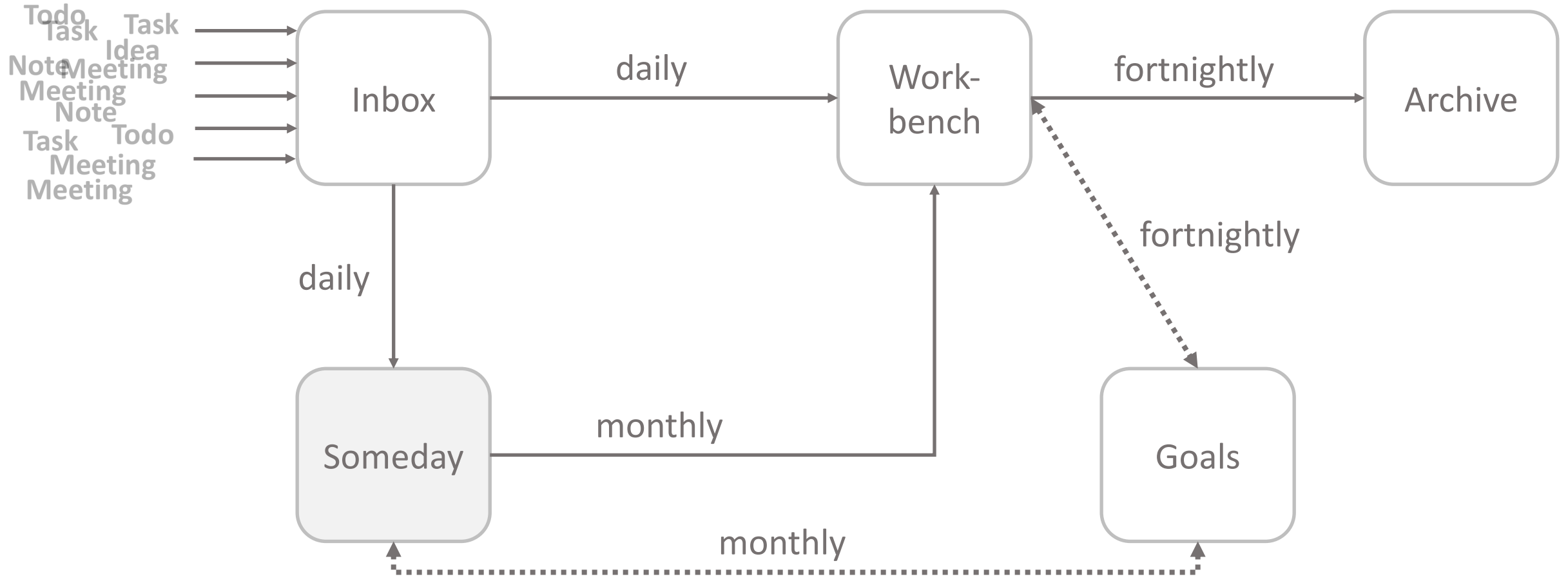
Entries are frozen/cancelled/prioritized according to **goals**
fortnightly, as necessary

- Administration :@work:admin:...
- Advising :@work:...
- Reviews and feedback :@work:reviewing:...
- Software :@work:software:...
- Proposals :@work:...
- Research :@work:research:...
- Teaching :@work:teaching:...
- Examinations :@work:...
- Conferences, workshops and seminars :@work:seminars_workshops:

:PROPERTIES:...

- **TODO** Seminar series: Algorithms & Computationally Intensive Inference...
- **TODO** Conference: MathSports International 2019...
- **TODO** Workshop: WHOA-PSI 4...
- **TODO** Conference: useR! 2019...
- **TODO** Talk: Ioannis Kosmidis at YRM seminar...
- **TODO** Conference: RSS 2019 conference...
- **TODO** Workshop: Greek Stochastics lambda...
- **TODO** Lunchtime RSE Talks presentation...
- **TODO** Research visit: University of Toronto...

- Ad-hoc meetings :@work:...
- Relaxation and routine :@work:routine:...
- Self development...
- Communications :@work:comms:...
- Claims...
- Lists...
- Workflow :hanging_around:...



Someday

Ideas & potential projects

that have not started yet and will not start anytime soon

Entries from **inbox** are categorized to **someday**

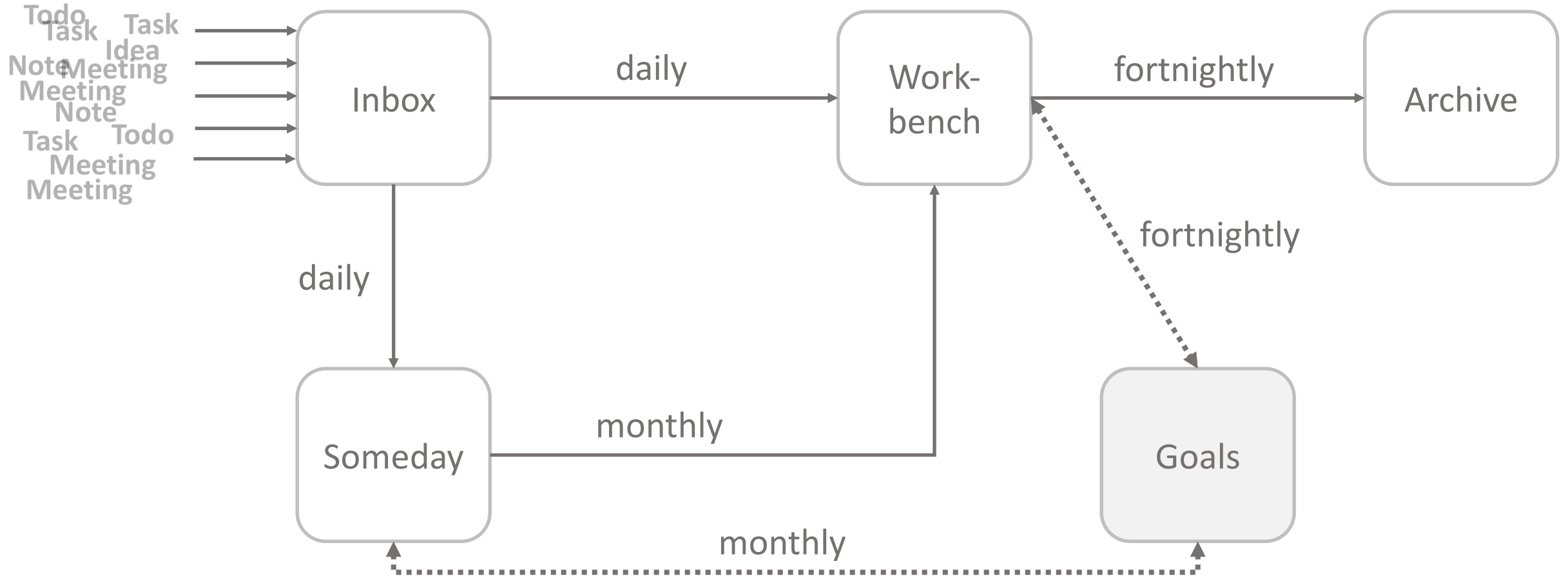
daily, as necessary

Entries from **someday** are moved to **workbench**

monthly, as necessary

Entries are reviewed according to **goals**

monthly, as necessary



Goals

Entries are mid- and long-term goals

monthly, annual, 3 years

Review fortnightly

freeze/cancel/prioritize entries in workbench

Review monthly

move entries from someday to workbench

adjust goals, as necessary

Archive

Completed and cancelled entries are refiled in **archive**
fortnightly

Same structure as **workbench**

Annual archives

Entry types

TODO

project, e.g. a provisional paper/R package title, YRM organization

states: INACTIVE, CANCELLED, DONE

NEXT

next task towards a todo

states: CANCELLED, DONE

WAITING

for something to happen/somebody to do something, typically towards a todo

Entry types

NOTE

something to retrieve later (thought), a resource (e.g. reference, software tool)

IDEA

e.g. idea for research, a seminar series, a book club, ...

typically it will be labelled as silly, but sometimes it becomes a todo

MEETING

BREAK

Typical workflow hierarchies

TODO

NEXT

NOTE

WAITING

MEETING

IDEA

CANCELLED

IDEA

NOTE

IDEA

WAITING

- * ○ **TODO** ST329 module 2018-2019
 - * **MEETING** Teaching ST329 - Topics in Statistics (R0.04)...
 - * **MEETING** Teaching ST329 - Topics in Statistics (MSB0.08)...
 - * **MEETING** ST329 revision lecture :meeting:...
 - * **MEETING** ST329 exam :meeting:...
 - * **MEETING** with Paul on peer observation :meeting:...
 - * **DONE** [#A] Fill in Cohort Feedback form for ST329 :@warwick:short_dash:teaching:...
 - * **DONE** [#A] Prepare ST329 lecture...
 - * **DONE** [#A] Record 2018-2019 dates for ST329...
 - * **DONE** [#A] Pop in Student Support to check ST329 exam requirement :errands:...
 - * **DONE** [#A] Prepare ST329 exam...
 - * **DONE** [#A] Prepare peer-review form for ST329...
 - * **DONE** [#A] Collate ST329 exam paper...
 - * **DONE** [#A] Moderate st329 exam...
 - * **DONE** [#A] Submit st329 exam...
 - * **NOTE** about new examination arrangements :note:...
 - * **DONE** [#A] Prepare ST329 revision class...
 - * **NEXT** [#B] Mark and moderate exams...
 - * **CANCELLED** [#A] ST329 solutions...

Timestamping, keeping time and tagging

All my entries are timestamped

for being able to recover project timelines if needed

Keep time for all NEXT and MEETING entries in workbench

how much time I spend doing X?

Tags

@work, @home, comms, seminar, note, reviewing, software, ...

Implementation

4 notebooks, 1 agenda, 1 stopwatch

1 notebook for each of inbox, workbench, someday, goals; update agenda daily

emacs

org-mode, agenda views, mu4e, workgroups2 , helm

Switching between interfaces takes me long, so I learned to use emacs for the majority of things

R and (R-)Markdown (any volunteers to work with me on this?)

workflow as an R package, possibly with an Rstudio plugin

...

Advice

Offload your brain in a trusted system
and focus on what is important

Your mail inbox is not a task list
an email is not a task; responding/reacting to it is

Teach yourself to speak to yourself
Find the verbs for your tasks

Think of the workflow that suits you and find the tools
do not let the tools decide for you

Manage work according to priority and available capacity

Resources

Org mode and task management systems

Getting Things Done: The Art of Stress-free Productivity, David Allen