Tackling big projects without getting crabby

Crabby Office Lady

When you find yourself in a position that requires you to discover your inner project manager, Office can help you manage your regular work duties so that you can make more time for that looming big project.

Finally. You've finally managed to get a handle on your daily workload and tie up some loose ends that have been nagging at you forever. Now maybe you can breathe a little easier and get out of the office when you eat lunch (and save your poor keyboard from all those crumbs).

But, no, someone up the ladder — on a rung higher than yours who has the power to press footprints onto your tender scalp — has had yet another 3 A.M. epiphany about yet another big project that is destined to change the way people think about life (or at least the way you think about him). And, of course, you're the only one who can handle the job. So how do you manage to keep your regular workload under control while tackling this new monster? Repeat after me: **Organization**, **delegation**, and **software-ization**.

Organization: Let your Inbox work for you

You know that being organized is a major part of being successful on the job. (I don't mean that your desk has to be neat and tidy. In fact, there is a quote about how a cluttered desk is the sign of a cluttered mind, but I think that's a bunch of hooey.)

In any case, if you've been assigned a new project, keeping track of your regular job duties as well as this new one takes some doing. Outlook Search Folders and flags are my way of tackling this issue.

Search Folders

As you may or may not know, I'm a big fan of Search Folders. Now, I've talked about these before, but apparently someone a bit higher up the corporate food chain than I (yep, same aforementioned person) offered some feedback about how I was "hard" and <gasp> "techie" in my descriptions of Search Folders. Rather than challenge this person to a duel, I decided the feedback was useful. And so, in the best interest of my readers (and my good standing), let me try this again:

A Search Folder in Outlook is just like an Internet search that you want to run all the time on your mailbox and keep the results in a folder. What's in there are basically links to things you keep somewhere else.

Huh. That seems clear enough.

For example, you can set it up so that whenever an e-mail message from so-and-so containing a phrase that is related to this new project (such as "marketing juju") comes barreling through the bandwidth, a copy of it gets tossed into the Search Folder you set up to grab messages with that criterion. That way you don't have to go through all your e-mail messages to figure out which ones pertain to the new project and which ones are parts of your daily work.

- About Search Folders
- Customize a Search Folder
- Search Folders: The easy way to find, read, and organize your e-mail (Training course)

Flags

I love flags. And I don't mean the kind that wave atop a flagpole or that they raise above the medal winners at the Olympic Games. Nope, I mean follow-up flags. Briefly, once an e-mail message comes in, you can attach a follow-up flag to it, and it'll be popped into the **Follow up** folder:

> Right-click the message, point to **Follow up** and then select the flag color you want to assign to it.

But wait! There's more! You can also flag a contact, and, as a bonus, if you try this today, you can add a reminder to both a contact and a message by setting a **Due by** date and time:

- Add a reminder to a message or contact

Now, certain messages weigh more heavily — on your mind, on your conscience, on your schedule, whatever — than others, and while you can keep the default titles of these flags (**Red Flag**, **Blue Flag**, **Yellow Flag** — gee, aren't those unique), you can also customize them to fit your needs (and me, as you can guess, I do have my needs...).

So what I do is name my flags according to when I need to follow up on that particular message: **Next week**, **Right away**, **When-the-hot-place-below-freezes-over**, etc. Once you've accomplished whatever the message indicated that you needed to do, you can unflag that baby and consider it done.

- About flagging for follow up
- Name your colored quick flags

Other organizing techniques

But of course, Search Folders and follow-up flags aren't the only way to whip that Inbox into shape:

- So that's how! Great Outlook features to organize your Inbox (Training course)
- E-mail management (A repository for all things regarding the management of e-mail)

Delegation: Share the love (and the work)

While I did write an entire column about how to delegate and make time for yourself, this time around it's about delegating to make time for this new project, not yourself (that will come later if you play your cards right and make this project one heckuva success). But the ideas are the same, so let's review:

- Give the people helping you on this project sharing permissions on your private folders. You can choose which folders you want to make accessible and how much control each person is granted (author, editor, reader, etc.).
- Set up delegate access permissions in Outlook, too. This means you can have your delegates send messages and accept meeting and task requests for you, and actually manage information in your private Outlook folders. And just as with private folders, you control how much access you want to grant to your Outlook account.
- If you are going out of your mind with this new project, perhaps it's time to Delegate Access: Let someone else mind your busyness (Training course)
- How Crabby learned to delegate (and lead a more normal life)

So, as you can see, a little delegation goes a long way when you need to get something done and make yourself look great. Just don't forget to share not only the love; share the credit, too.

More information about delegates

- About delegate access
- Delegate access permissions

Software-ization: Get the right tools for the job

There are tools out there designed to help busy people. And, can you believe it, Microsoft Office just happens to make some of those tools (fancy that!):

- **Project** The name just screams "special project" doesn't it? In a nutshell, Project is a tool that project managers can't — well, shouldn't — live without, and since you are about to discover your own inner project manager, consider learning to use this tool. It's a great way to keep your projects on time and within budget.

  First, take a look at some of the Project 2003 demos, which will open up a new world of project management to you.

  Create schedules, estimate costs, assign resources, and track progress with comprehensive project management tools.

  Communicate and present project information by generating, formatting, and printing custom reports, presenting project data in other programs, and sharing project plans with others who are working on this project with you.

  Project is made for customization: Customize how you want to view data, what types of toolbars you need, and while you're doing this you can also promote project management methodologies and best practices by developing custom Project Guides.

- **Microsoft Exchange Server** Of course, I've already gone over some of the ways Outlook can assist you in your quest to be a temporary project manager. But when you combine it with Exchange Server, that's when the real action gets going. When you combine Outlook with Exchange Server, you can:

  Share your calendar.

  Use the Delegate Access feature in Outlook.

  Make use of public folders.

  Use offline folders even when you're not connected to the Internet (gee, does anyone have Internet access problems? Oh no...).

  Use Cached Exchange Mode, so that all of your Exchange server folders are available automatically.

- **Windows SharePoint Services** I've also talked about SharePoint Services before. We use them a lot on our team, and they make collaboration and project tracking a cinch. Some features to think about:

  Document collaboration: Collaborate on presentations, documents, spreadsheets, and drawings by creating Document Workspaces.

  Version control (using easy check-in/check-out): Documents can be reserved by individual users for updating purposes.

  Meeting Workspaces: These act as central spots to house all the information you need for those non-face-to-face meetings.

- **OneNote** The OneNote shared session feature is a cool way to gather a bunch of ideas about how to get this project done and done well:

  About shared note-taking sessions

  About sharing notes with others

  Send notes in an e-mail message

  More information about sharing notes (with people, programs, or things)

And there you have it, a few ways to make sure that you can manage your daily work as well as impress that night owl and make his pet project a reality.

"Whenever you are asked if you can do a job, tell 'em, 'Certainly I can!' Then get busy and find out how to do it." — Theodore Roosevelt

About the author

Annik Stahl, the Crabby Office Lady columnist, takes all of your complaints, compliments, and knee-jerk reactions to heart. Therefore, she graciously asks that you let her know whether this column was useful to you — or not — by entering your feedback using the **Did this article help you?** feedback tool below. And remember: If you don't vote, you can't complain.

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