

Using Outlook as project planner

Most people don't have specific software just for managing their projects. So they use what they can access on their desktops. One great tool for this purpose is Microsoft Outlook.

1. Brainstorm tasks

Starting in any one of seven task views, such as Simple, Detailed or by Category, you will see a Click here to add a new Task field at the top. You do not have to know the duration or even the order of each task: Just start typing and brainstorm your task list. Let's use an event as an example, with a simplified set of tasks.

2. Set start/end dates

You have all your tasks, so start with the last task and work backward to determine when the preceding tasks would have to be completed before working on the current one. It might help to do the math in say, Excel. For example, if the event will take place on 10/10/11, you can type in a simple formula to determine when travel reservations should be completed, say, 21 days. So, the travel arrangements would have to be complete on 9/19/11.

You might want to give yourself a week to get this done. To arrive at the start date for the task, begin with the end date of 9/19/11 and subtract seven to get 9/12/11. Do this until you have determined the start and end dates of all tasks. Use the date picker to do this right in the view.

3. Categorize tasks

Check the Task Timeline view to see if the order of things makes sense. Once you are satisfied with the timeline, assign a category. This will keep all the tasks together associated with a single project. That way, in the Category view of tasks, you can view all of your tasks as a chronological task list.

You also can filter other views by Category, to see only the tasks associated with this project. However, don't overlook the value of looking at multiple categories in the timeline view to spot potential conflicts.

4. Add task details

The next step is to take a look inside each task item. You can insert more Outlook items, file attachments, diagrams and other illustrations, as well as Quick Parts (2007-2010), hyperlinks and contact cards. You also can set your reminders to stay on top of things. You might find it useful to record the preceding and succeeding task dependencies, so you can remember to change the dates should delays occur.

Repeat success by dragging all the completed tasks for a project into a folder. Use them again with different dates.