Microsoft OneNote: Beyond Notetaking
With Melissa Esquibel, MCT

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Roadmap

• Location and Security
• Tags
• Links
• Templates
• Other Tools

Keep in Mind

• Tools used are in the PC desktop version (also available on most Surface)
• Other devices may collaborate, but not with all functions available
Where can I store my notebooks?

- **Only you**: You can store your notebooks on your local computer.
- **Co-workers & permitted external users**: You can share your notebooks with co-workers and certain external users, either through SharePoint or OneDrive.
- **Anyone you decide (within guidelines)**: You have the flexibility to decide the storage location for your notebooks, as long as it complies with the guidelines set by your organization.

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Notebooks That Do the Heavy Lifting

- Structure
- Prescribed content
- Documented processes
- Automation
- Facilitated collaboration

Annotating

- Built-in Tags
- Custom Tags
Custom Tags

• Home tab, Tags group, Tags gallery More button
• Customize Tags…
• New Tag
• Choose
  – Symbol
  – Font
  – Highlight
Tag Summary

- Home tab, Tags group, Find Tags button
- Choose sort order
- Create Summary Page
- E-mail Page
- Print page to PDF
Tag to Outlook Tasks

- Everyone tags their own tasks
- Members can use Outlook or OneNote
- Synchs back and forth
- Works with everyone in the notebook
- Drawback: tag summaries aren’t as useful

Tags in Projects

- Task Assignments
- Waiting
- Question
- Idea
- Outlook
Tags for Travel

• Need Travel
• Travel Booked
• Questions on the road
• Tag for the mobile device

Tags for Minutes

• Attendance
• Action items
• Look-forward items
• Tabled issues
• Acronym glossary
Tags for Admin Manual

- Who to call...
- Onboarding info
- Change
Links

- Locations in Notebook
- Other Notebooks
- Other Files
- Web

CTRL K
Links in Projects

• Task predecessors/dependencies
• Status reports
• Deliverables

Links for Travel

• Itinerary documents
• Travel vendor websites
• Embassies and other contacts
• Answers on the road
Links for Minutes

- Ongoing attendance
- Meeting materials
- Previous meeting minutes
- Location logistics
- Seating arrangements

Links for Admin Manual

- Policies and procedures
- Forms
- Catalogs
- Websites
- Support Cross Reference

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Templates

- Page (.one)
- Section (.one)
- Notebook (.onepkg)

- Open .onepkg, create new notebook
- Open .one, move/copy to desired notebook

File, Export
Templates in Projects

• Status reports
• Change control request
• Meeting checklist
• Project notebook

Templates for Travel

• Trip pages
• Travel vendors (table)
• Embassies and other contacts (table)
• Q&A on the road tag guide
Templates for Minutes

- Agenda
- Attendance page
- Minutes
- Governance info
- Minutes book (notebook)
- Meeting (pages)

Templates for Admin Manual

- Supported person page
- Admin Page/Section
- Onboarding checklist
- Procedure outline
- New procedure checklist
Section Groups

- Great for archiving
- Can create another level of hierarchy
- Don’t overcomplicate!

Ideas

- Project: Archive status reports
- Minutes: Archive past meeting minutes
- Admin Manual: Section groups for each Admin
Security

• By notebook
  – OneDrive/SharePoint, use Share functionality
  – Network drives, whoever has permission to the drive has permission to the notebook

• By section
  – Password protect sections

Page Protection
Protect Section Ideas

• Project – Deliverables in process
• Minutes – The actual minutes pages until it’s done/approved
• Admin Manual – Confidential contact information
Pens

• Choosing pens for white board
• Converting ink to text

**TIP: Use ruled lines**

View tab, Page Setup group, Rule Lines

How are you going to put this to work for you?

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THANK YOU!
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