



Setting up Microsoft OneNote to Work Effectively for You

Microsoft OneNote is a powerful tool that can help you capture reference and action information in meetings and on phone calls. There are many sophisticated ways to use OneNote; however, in this column I am going to review just a few basics to get you started. Before using OneNote, it is important to decide what you are going to use it for -- you want to be sure it integrates seamlessly with Microsoft Office Outlook and adds value to your productivity instead of reducing it. Outlook is your central personal productivity system, tracking your calendar items, tasks, reference data, and e-mail. Therefore it is important to understand how to integrate your existing system with OneNote. To do this well, you first need to understand the difference between reference information and action information, set up an appropriate folder hierarchy in OneNote, and develop a methodology for taking meeting notes and capturing actions.

First, let's talk about the difference between action information and reference information.

Reference Information:

Using Microsoft OneNote On a Daily Basis

When you are in a meeting and want to take notes you can simply open OneNote, go to the relevant Objectives folder, click down to the Supporting Project and you will automatically see a meeting page. If you do not see one, you can open one by choosing the Insert command, then click on New Page.

Once you have a new page, you will see a space for a heading on the top left and you can enter a heading here. We recommend the date and the name of the meeting. OneNote has a super search function, you can search by date or keyword so be aware of this when creating meeting headings.

You are now ready to take meeting notes. All you need to do is start typing onto the page, or writing with your stylus if you have a Tablet PC. If you look at your icons on the top of your screen you will notice that you have formatting icons so you can use bullet points etc to create clearer notes or format what you did after the meeting.

As I said earlier, it's important to ensure that you record action items in your Action System and not in

Reference information is information that you want to keep because you will refer back to it at a later date and it is relevant to your objectives and supporting projects. There are no actions you need to take with this information: it is purely for reference. There are four central locations where you can effectively store your reference information for ease of retrieval:

- E-mails can be stored in your personal folders
- Documents can be stored in My Documents
- Contact data can be stored in your contact system, preferably Outlook Contacts
- Shared reference data can be stored on a SharePoint team web site

These four systems make up one complete Reference System. We will be discussing how you can add OneNote to this system below.

Action Information:

Action information is information that you are required to have in order to complete a specific action. For example, a proposal you received in an e-mail that you need to review and edit before sending onto a customer. This information is essential to have available in order to complete the action.

Your calendar and your task pad are the best places in Outlook to store your action information, and make up your Action System. They are easily

your OneNote Reference System. This is actually quite simple.

If an action item comes up in a meeting, it is easy to record the action item in your Action System (your TaskPad and Calendar): simply click on the "create Outlook Task" icon on the tool bar on the top of your screen. This creates an Outlook Task, and enables you to record the action and then save and close it in the Task Pad and not in OneNote. This means you can keep recording reference information in OneNote and when actions come up all you need to do is use this icon to immediately track them in your Action System; i.e. your TaskPad. This is extremely useful and enables you to keep separating action items from reference items.

If you need to record in your meeting notes that action items were discussed or delegated, you can type the action into OneNote, then highlight the action, click on the "create Outlook task" icon and a task window will immediately show up with a new task created so you can file it in your Action System in the TaskPad. This way you have it in two places: you have recorded it in your meeting notes (for information only) so you know it was discussed. And you have also recorded it in your Action System so you can do something about it without needing to go to your meeting notes to remind you to do something.

Once a meeting is over, you may want to distribute notes via e-mail. Click on the mail icon on the top tool bar and an e-mail message shows up, with your notes included in an

available and you can drag and drop tasks from your task pad onto your calendar to ensure they get done.

The key to integrating OneNote into your current system is to understand the difference between action and reference information and deciding how to use OneNote. We suggest using OneNote as part of your Reference System only and specifically for capturing meeting notes that you want to refer back to. OneNote has a feature, which we will talk about later, that allows you to create a task directly in your TaskPad while you are taking meeting notes in OneNote. This feature enables you to keep action information separate from reference information, supporting your overall system.

Next, let's talk about the OneNote folder hierarchy.

A key step in using OneNote to take meeting notes is deciding on how you are going to set up your folder hierarchy. This will allow you to easily file and find meeting notes. We recommend you set up the exact same folder hierarchies across your entire Reference System. This makes it much easier to file and find data overall. If you have an existing folder hierarchy that works well for you in your e-mail Reference System or your My Documents system, we suggest you use that for OneNote as well.

OneNote allows you to set up top level folders that you can file in. Within each folder you can insert sections, with each section you can insert pages and within each page

attached file and in text so the recipient can store the OneNote message in their Reference System.

As I mentioned earlier, OneNote has a pretty powerful search tool that lets you search for notes based on keywords. All you need to do is type in a keyword in the field on the top right-hand corner of the screen under the tool bars and press the arrow to the right of this field. OneNote highlights the location of each occurrence of the keyword and tells you the number of occurrences so you can easily find the notes you are looking for.

Of course, there is a lot more you can do in OneNote: you can record, you can draw, you can handwrite with a Tablet PC, and on and on. But if you are new to using OneNote, start off with these basics and get OneNote set up in a way that it integrates with your personal productivity system.

A Few Thoughts on Organizing Your Reference System

When I was writing the column about OneNote, I started thinking about how Reference Systems are organized. I suggest that you set up your folder hierarchy throughout your Reference Systems around your Objectives and Supporting Projects. This may seem unusual to some of you reading this article because it appears somewhat counter-intuitive. However, if you stop to think about it for a moment, what are the most important things for you to focus on? We believe it's your objectives and those projects that support them in being

you can set up sub-pages.

We recommend setting up your top level folders so they represent your Objectives, setting up your sections to represent Supporting Projects, and specific pages to represent meetings that link to your Supporting Projects and Objectives.

Step one: Create top level folders by Objectives

To create a folder, ensure that you see the heading "My Notebook" on the top left of your screen. This is the name of your folder tree. Once you see this heading:

- Choose the Insert command
- Click on New Folder
- A new folder will appear on the top of your screen
- Label the new folder with the name of one of your objectives

Keep repeating these instructions until all of your objectives have folders.

Step two: Create sections by Supporting Projects

- Click on one of your new Objective folders
- Choose the Insert command
- Click on New Section
- A new section will appear under

achieved. Your task list is set up around these objectives and projects to help you maintain this focus. So why not set up your Reference System the same way? One of the big benefits in doing this is that when you go to file data that doesn't relate to one of your objectives it won't have a folder for you to put it in, so you'll become very aware of how much information you are trying to file that is not relevant to your actual work.

If your Objectives and Supporting Projects are clear, it is extremely easy to set up your folder hierarchy. However if your Objectives and Supporting Projects are not clear, this is hard to do. In this case people will often set up their Reference System folder hierarchy randomly, creating folders around incoming reference information, resulting in numerous random folders. This makes it hard to file and find data.

If you are not completely clear on your Objectives and Supporting Projects I would recommend meeting with your boss to get these clear as soon as possible. It will really impact your productivity in a positive way, helping you to differentiate between important activities and "make work" activities.

The greatest benefit of filing by Objectives and Support Projects throughout your Reference System is that it keeps you focused on them: when you go to file information you have to think about which Objective or Supporting Project it relates to and when you

the Objectives folder

- Label it with the name of one of your Supporting Projects

Keep repeating this process until all of your supporting projects have been added to your objectives.

This will complete your Folder Hierarchy and hopefully this hierarchy will not change until you go through a planning process to create new Objectives and Supporting Projects.

E-News Quote:

"The great thing about a computer notebook is that no matter how much you stuff into it, it doesn't get bigger or heavier." - Bill Gates

go to find data you have to do the same thing. This keeps you focused on what is important.

Another Article by Sally McGhee

Microsoft recently published Sally's latest article, "[7 Tips for Working on a Team Web Site](#)". It summarizes many of the things we have learned in setting up and managing our own internal SharePoint web site.

To discuss how McGhee strategies can help you achieve your objectives more effectively, just [e-mail us](#) or contact us any time from our [web site](#).

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