



Instant access to your key information.

Flexible collaboration for you and your entire team.

WorkingSm@rt® + OneNote

Do you like the flexibility of notebooks? Back before laptops, smartphones and tablets, we had to take notes on paper. Preparing for a call or a meeting, taking notes during conversations and sketching diagrams all happened on pages that allowed your creativity to run freely. Times have changed and in the age of digital communication, we thought we had to trade some of the flexibility of paper notebooks for the easy retrieval and mobility of cloud technology and portable productivity.

Microsoft OneNote gives us the best of both worlds because it is a **digital** notebook. OneNote is an information aggregation tool that allows for the free form gathering of information, thoughts, communications and plans in a solo or collaborative environment. Our *WorkingSm@rt + OneNote* training teaches the processes that allow this tool to supplement Outlook and take your productivity to the next level.

You may already be using Outlook to help you track your activities and appointments, and to store information for easy retrieval while effectively managing your time and workflow. Learning to apply *WorkingSm@rt* workload management techniques to OneNote will expand the range of options available for organizing work, taking notes, capturing images, and linking information between projects and people.

Attendees of this half-day program will:

- Learn to use OneNote as part of their workload management system
- Select the right tools for efficiency and effectiveness
- Integrate OneNote with Outlook
- Enhance collaboration on projects and within teams by using shared Notebooks
- Practice “Day in the Life” simulations that highlight best practices in note taking, planning, brainstorming and information management

Who should attend WorkingSm@rt® + OneNote? People who:

- Would like to be more organized with information storage and retrieval
- Spend a large part of their workday tracking and planning communications
- Work closely with internal and external partners on projects that require high levels of collaboration
- Roll out initiatives and projects that require detailed planning, frequent meetings and copious note taking



THE WORKINGSM@RT® EXPERIENCE

To achieve our results, *WorkingSm@rt®* + OneNote is typically delivered as a comprehensive learning initiative which consists of:

- Delivery of the **initial workshop**, *WorkingSm@rt®* through **two, 2-hour virtual sessions**.
- Learning/reference guide and training materials.
- Up to 60 minutes of small group **coaching** for each participant.
- A post-workshop reinforcement strategy, **Learner4Life**, which gives participants access to ongoing support through monthly tips and regular webinars to stay productive.

Max class size is 23 people.

Course Outline

Module 1: Effective information management

- Surface today's information management issues that affect your performance at work.
- Decide which aspects of information management you want to improve.

Module 2: Getting started with OneNote

- Review the basic concepts of OneNote.
- Recognize the structure of OneNote notebooks.
- Creating, saving, sharing and accessing your notebooks. Use a Notebook to support a project.

Module 3: Taking notes

- Inserting notes in sections and pages.
- Creating and using templates to facilitate your individual and team note-taking.
- Inserting different types of information.
- Managing space in pages.

Module 4: Working as a team in shared Notebooks

- Using OneNote in a docked session to easily link information from an application or from the web.
- Managing shared notebooks.
- Working as a team in a shared notebook.
- Managing different editions of a notebook.

Module 5: Linking, tagging and locating notes

- Linking two pieces of information.
- Tagging your information.
- Retrieving your information using links and tags.

Module 6: Integrating OneNote with Outlook + Teams

- Email integration and sending notes to others.
- Creating and syncing tasks.
- Contact integration.
- Meeting note integration with calendar.