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Conversational OneNote for Meetings

By Heather Severino (Microsoft MVP – Office Apps and Services, Microsoft Certified Trainer)



**In this
book, you
will learn:**

- How templates can be used to streamline meeting notetaking
- How to use OneNote notes to take action and track activity using Outlook and Teams



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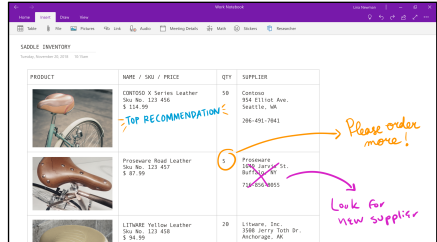


OneNote

Your digital notebook

Your World, organized

Get organized in notebooks you can divide into sections and pages. With easy navigation and search, you'll always find your notes right where you left them.



Gather your thoughts...

Quickly capture important information and ideas through images, videos, audio recordings, as well as ink and voice.

...then make them even better

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Share and collaborate

Great minds don't always think alike, but they can share ideas and create together in OneNote.



For more information, visit
www.microsoft.com/onenote

Conversational OneNote for Meetings Notes

by Heather Severino

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The “Conversational” Method

We have two objectives when we create a “Conversational” book. First, to make sure it’s written in a conversational tone so that it’s fun and easy to read. Second, to make sure you, the reader, can immediately take what you read and include it into your own conversations (personal or business-focused) with confidence.

“Geek in the Mirror” Boxes

We infuse humor and insight into our books through both cartoons and light banter from the author. When you see one of these boxes it’s the author stepping outside the dialog to speak directly to you. It might be an anecdote; it might be a personal experience.



Within these boxes I can share just about anything on the subject at hand Read 'em!

What's your current meeting notetaking process?



“It’s going to be a long meeting. Which one do you want?”

When you’re writing up meeting notes, do you:

- Write everything down on a paper pad? Where do these disjointed pages of notes then end up – in piles on your desk, in various folders of a filing cabinet, left by the water cooler in your office building?
- Or, do you create Word documents with typed paragraphs of everything that happened in the

meeting – every decision that was made? Then save these documents in project-titled folders?

- How do you access these notes again? How do you make sure actionable items do not slip through the proverbial cracks?
- How do you take meeting notes together? Or better yet, with your current process can you take meeting notes together?
- Do you share meeting notes with other attendees by email? Are they outdated as soon as you hit send?

It's okay if you answered, "Yes, I do that" to piles of notes on your desk, "I'm not sure" to the question about making sure actionable items do not fall through the cracks, or "Yes, I email meeting notes to my fellow colleagues and there's a lot of back and forth with task updates and shared information".

Whatever your answers were, this book will help you find your preferred workflow – an efficient way of capturing and organizing your meeting notes.



I still take many handwritten notes on napkins, paper notepads, whiteboards, and sticky notes (when I don't have a device handy, or when it makes more sense to sketch on a larger scale).

It's what you do with those analog notes that counts. Take a picture and add it to your OneNote notebook, or rank the important notes and digitally ink them into a notebook page in that order.

Add meeting notes to a page

When you attend a meeting how do you start taking meeting notes? Do you open your Outlook calendar meeting, read an agenda and related details, then start jotting meeting notes with pen on paper, such as the topic, who attended, and key points to address?

Imagine you have a recurring manager meeting that you take handwritten notes for each week. While you could follow the same process by manually writing or typing all the meeting details into a notebook page, OneNote provides an integration with Outlook to auto-populate all the details from the meeting instance into a notebook page. This integration is called Meeting Details. The name is fitting, don't you think?

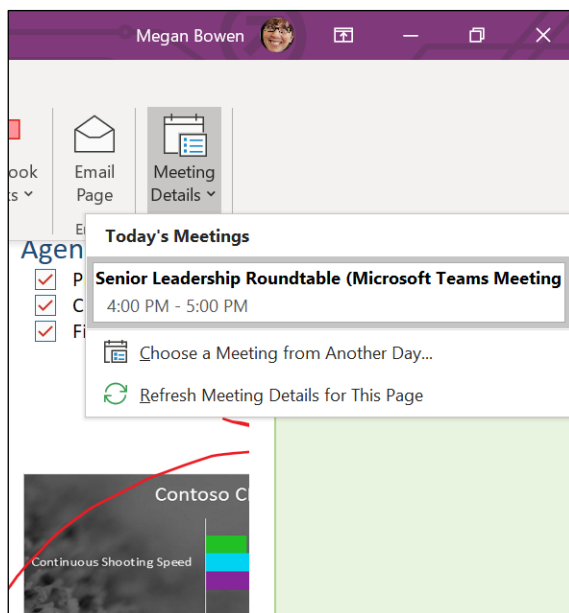


Figure 1: Meeting details as the panel appears in the OneNote app

When Meeting Details (located on the Home ribbon) is selected it will add a note container to the current page in view. If a notebook named 2020 Work is open with a section titled “Manager 1:1 Meeting”, then a note container will be added to the page of the Manager 1:1 Meeting section that includes the meeting details, i.e. date, time, invited attendees, and other content like an agenda, instructions, etc.

A “Notes” area is included at the bottom of the note container. This is a great place to start capturing action items, or decisions. Depending on the kind of notes you take, you may consider changing the title from Notes to something more meaningful.



Meeting Notes is one of my favorite productivity features. If you are using OneNote for Web, OneNote for Windows 10, or OneNote for Mac, this feature is also available there.

It's found on the Insert ribbon.

To learn more about inserting meeting details, watch this video.

<https://aka.ms/MeetingDetails>

For each subsequent meeting in this recurring series, you can follow the same Meeting Details process, and all your notes will be neatly organized in the Manager 1:1 Meeting section for future reference.

Think of the time you'll save by not typing or writing these contextual notes manually. Plus, there's less chance of user entry error – where some information is typed inaccurately or left out altogether.



If you are taking notes in OneNote for Windows 10, you can sort the pages of a section in ascending or descending order, in alphabetical order, by date created, or by date modified.

Let's look at this from a different angle. Say, you're a project manager that plans and manages many project meetings.

In the past, perhaps you gave participants context about meetings by including an agenda and attached files in the meeting body area of the invitation. Instead of adding this information to the meeting body area directly, let's look at how you can include this information in a notebook using the Meeting Details feature.

The Meeting Details feature is also available from your Outlook calendar. With this, you can take personal notes – just select the Notebook and section where you want the details to be added – or you can include a shared notebook link in a meeting invitation for everyone to work with. As the project manager, you need to be sure to include a link to this shared notebook within your meeting invitation.



When you share a notebook, all contents will be shared. To learn more about shared notebooks, click the link below to check out the Conversational OneNote for Collaboration ebook in this series.

<https://aka.ms/ONCollaboration>

If you haven't already setup a cloud-based notebook for the project, you can create a new one during the process of setting up Meeting Details.

Before or after sending the meeting invitation, you can go to the notebook page and build an agenda so everyone knows what they will be talking about, and who will be presenting.

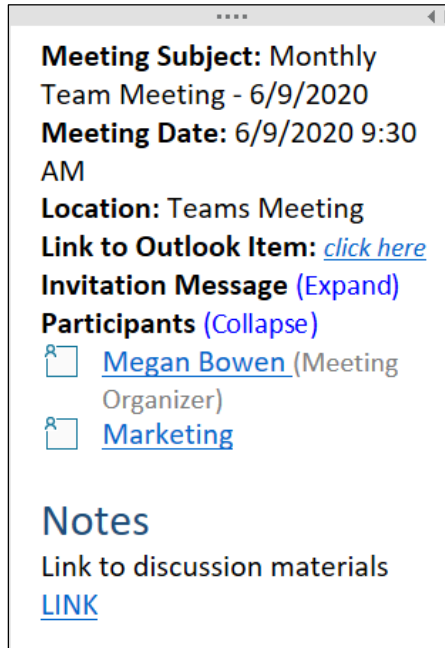


Figure 2: Meeting details inserted from an Outlook meeting

As you kick off the meeting you can track who attended the meeting using the In-Attendance tags.

As the meeting progresses, you can capture discussion points and decisions on the same page.

If you're attending a meeting, you can follow the same process to get the meeting details into a notebook page. If there's a PowerPoint presentation in your meeting you can even insert a printout of slides into a page. As the slides are presented in the meeting you can use digital ink to circle important information on the slide and jot down notes next to the slide.

You can also jot down action items in the Notes section. Speaking of action items, let's see how Outlook tasks can help you keep track of these.

Track Action Items with Outlook Tasks

Carrying on from the last chapter, let's say you're the project manager facilitating a team meeting. You've been entering action items in the Notes section of the page. Some of these are things you need to follow up on and some are things that project members need to work on. By selecting the action item text and then selecting the Outlook Tasks command, you can assign these as Outlook Tasks (assigned to you directly), which are due Today, Tomorrow, This Week, or Next Week. For action items that someone else needs to work on, you can select Custom Date and then Assign it to that person.



There are many list and task apps out there. Wunderlist was a favorite of mine for several years. Now that Microsoft has made this app part of the family, they have built a new app called To Do. This provides a delightfully simple daily task app experience. The To Do app is available for Windows 10 devices, as well as for Android and iOS. It integrates with Outlook Tasks, Planner, and other Microsoft 365 apps and services.

As a task gets updated in Outlook Tasks or the Microsoft To Do app, or is marked as complete, OneNote syncs these changes in both application locations. This means you always see the most up-to-date status of the task.



Each Outlook Tasks type has a keyboard shortcut. I assign many tasks to other team members and regularly use the Custom Tag keyboard shortcut, Ctrl+Shift+K.

Categorize and Prioritize with Tags

OneNote comes with pre-built tags such as Important, Question, Idea, and more. Think of these as priority or category labels that you can assign to specific meeting notes.

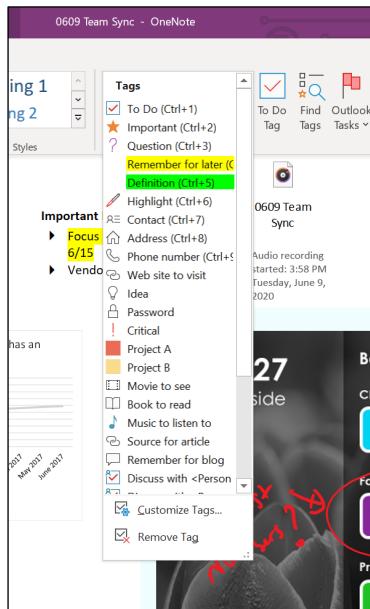


Figure 3: OneNote pre-built tags menu

While pre-built tags are great to get you started, you will likely need tags that are more specific to your particular meeting or project notes. For example, you might want to create custom tags based on priority, category, or who it's assigned to.

For that one-to-one manager meeting you attend weekly, you can create a custom tag called Manger 1:1 and then tag all the notes from that meeting that you need to take action on to keep yourself organized.



If you take notes with OneNote for Windows 10, or OneNote for Mac, Custom Tags are also available to be setup and used.

While creating a custom tag you get to:

- Assign the display name
- Pick the symbol
- Select the font and highlight colors
- Assign a keyboard shortcut (nine tags can have assigned keyboard shortcuts)

Here are some examples of other things you might want to create custom tags for:

- Critical notes discussed in a meeting that are potential showstoppers to your project completion, or items that may delay dependent tasks.
- Other actionable work discussed that may need to be prioritized. You can create priority ranking custom tags

(Priority 1, Priority 2, Priority 3, and so on), or create custom tags ranking from High to Low.



Figure 4: Notes that have various tags applied

Now that the custom tags have been created, note containers can be tagged and quickly retrieved in the future. You can locate tags using the Find Tags feature – this is separate to the Search feature. Let's say you need to find all the tags across a number of different notebooks related to a project called Project Falcon. When you use Find Tags, a panel displays groupings of each tag it finds within the current notebook section. Each of the tags listed has a link that you can use to go directly to that tag. You can also expand where to find tags.



To learn more about searching for custom tags, watch this video.

<https://aka.ms/CustomTag>



My action item tag system includes finding tags by name or section and displaying only the unchecked items (what still needs to be done).

To generate a list of everything in one page, I select the Create a Summary Page command. This creates a new page with all the unchecked items. A quick sheet view of everything that needs to be completed and each item can be checked once completed.

Notetaking related to work is a continuous loop. You will need to refer to notes again and again. Search is a powerful feature that can help you quickly find all sorts of notes that match a given keyword. Let's say you search for the keyword, draft. A panel will display a list of linked matches including typed notes, handwritten notes, inserted documents, images, audio, and even video recordings that contain the word "draft" in the note itself, or in the filename for attached files.

Meeting Notes and To Do Templates

At the start of this book we introduced the meeting notes integration between Outlook and OneNote. This was done specifically to show how meeting details can be automatically added to a notebook page, and even shared as a link in the meeting invitation.

But what if you don't need all these meeting details? Instead, you need a structured page that has pre-built note containers setup for capturing specific types of notes during your meetings.

Page templates offers just that, pre-built page templates with customized note containers that are ready to capture different

types of notes. Several categories offer project, meeting, task, schoolwork, and personal templates.

The Page Templates command is located on the Insert ribbon. The meeting templates are in the Business category. Several template styles are available, including simple, informal, personal, detailed, and formal.

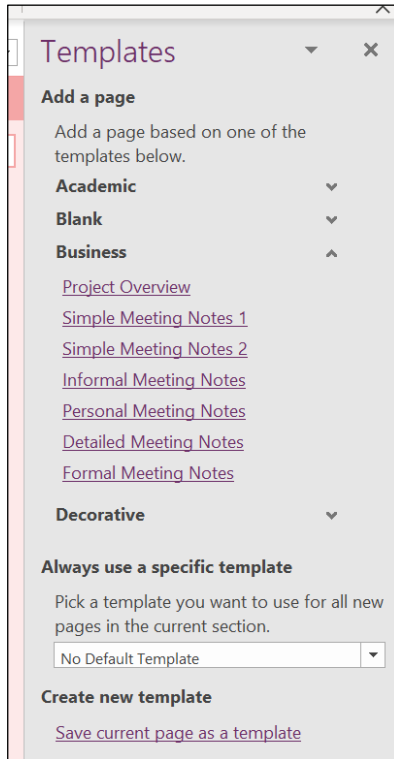


Figure 5: My Templates Panel with the Business category expanded

Once you've selected the template you want, you can start taking notes under the different container headings, such as agenda, meeting minutes, important points, action items, and follow-up questions.

Meeting Title

Friday, June 12, 2020 10:02 AM

Agenda:

-

Attendees:

-

Opening:

The regular meeting of the [name of organization/committee] was called to order at [time] on [date] in [location] by [Meeting Chair].

Approval of Agenda

The agenda was unanimously approved as distributed.

Approval of Minutes

The minutes of the previous meeting were unanimously approved as distributed.

Open Issues

Summarize the discussion for each existing issue, state the outcome and assign any action item.

Figure 6: A pre-built meeting template

After you've had a chance to capture notes with a template a few times, you'll likely find that the note container titles need to be updated with more meaningful names. You'll likely also rearrange some of the note containers on the page. Any changes you make to a pre-built template can be saved including modified text, a company logo, a background, and formatting of text and borders.

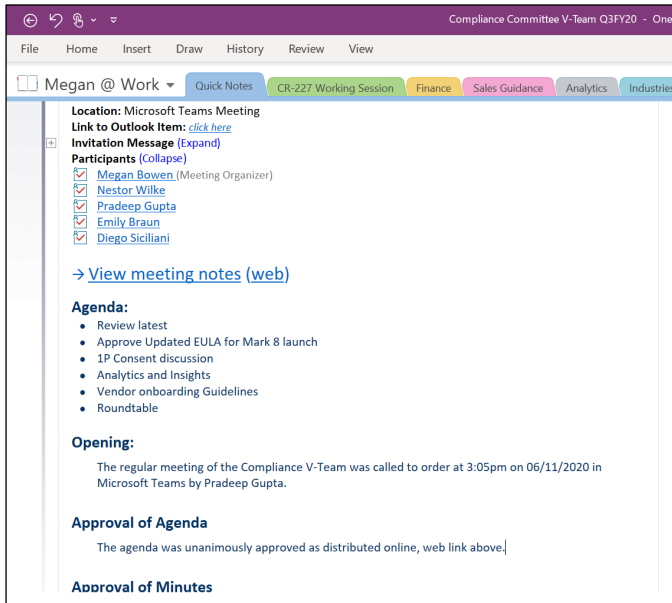


Figure 7: A custom meeting template added as a notebook page and updated with meeting notes

Once the changes have been made, save the template with a new name and it appears in the My Templates category for future use.

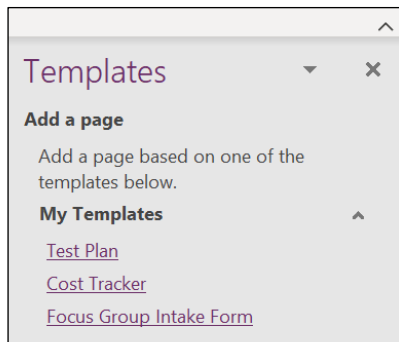


Figure 8: The Templates panel showing the My Templates section



If you're applying the same format for each meeting notes page of a section, in the Page Templates panel you can pick a template to use for all new pages created in the section. This can take your notebook structure to the next level while automating the custom page creation process.

Think of how you can create page templates for other types of work, such as brainstorming, project planning, schoolwork, or family medical care, and then assign those to related sections for new pages.

The Big Takeaways

In a world where people can (and do) work from anywhere, Microsoft OneNote is a feature-rich notetaking solution that helps you capture, organize, and access notes from anywhere. Through a variety of different apps (desktop, online, or mobile) you can jot down notes, share ideas, capture meeting action items, and access notes more effectively.

We know that Microsoft will continue to build more connective tissue between all the services in OneNote and other connected Microsoft 365 apps and services. We're excited to see what comes next.

To download the OneNote application, visit:

<https://onenote.com/download>

We want to hear about your notetaking in OneNote. Tell us about your experience online or get your questions answered in the Microsoft Tech Community at:

<https://aka.ms/ONTechCommunity>

You can also use these Microsoft resources to start or enhance your notetaking journey with OneNote:

Get started with OneNote help & learning:

<https://aka.ms/MicrosoftOneNote>

To learn more about capturing and organizing ideas with Microsoft OneNote, follow @msonenote on Twitter.

Submit, upvote and track progress for OneNote feature suggestions on the OneNote UserVoice page:

<https://onenote.uservoice.com>

Want to find out more about how OneNote can help you in different settings? Check out the other ebooks in this series:

Conversational OneNote Essentials

<https://aka.ms/ONEssentials>

Conversational OneNote for Collaboration

<https://aka.ms/ONCollaboration>

Conversational OneNote for Life Moments

<https://aka.ms/ONLifeMoments>

Quickly become conversational about using Microsoft OneNote.

The art of note taking has evolved. Today's meetings, journals, and brainstorming sessions require an ability to easily create, categorize, store, retrieve, and share notes. In this ebook, you'll learn about OneNote and how it can be used to completely transform your note taking.



About Heather Severino

Heather Severino is a Microsoft MVP, Microsoft Certified Trainer (MCT), and owner of TeachUTech, specializing in Microsoft Office, presentation and instructional skills training, instructional design, and authored training videos.



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