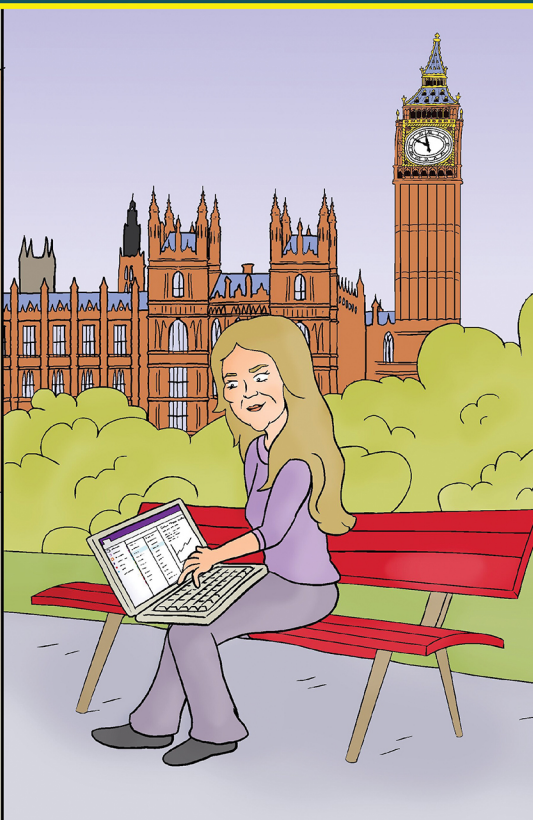ConversationalGeek®

Conversational
OneNote for
Team Collaboration

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

In this book, you will learn:

- How OneNote facilitates easy collaboration of notetaking through sharing and Teams
- How the OneNote mobile app can improve the quality and detail of notes on the go

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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

Revise your notes with typed or handwritten text, and highlight and annotate what's important. With OneNote on all your devices, you'll never miss a flash of inspiration.

Share and collaborate

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

Microsoft

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

Conversational OneNote for Team Collaboration
by Heather Severino
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Publisher Acknowledgments

All of the folks responsible for the creation of this book:

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!

OneNote: Great for Collaboration

Chances are we've all managed or attended a meeting and had to share meeting notes later with our colleagues. These notes were likely captured in a Word document. So, you may have attached the document to an email or copied the notes from the original source and pasted the content into the message body of an email. If you were already taking notes in a OneNote Notebook, you may have discovered the Email page command and used this to send the page of notes in an email.

No matter what your preferred method is for sending notes by email, how soon are those notes out of date? How do you collect questions or updates from your colleagues about the

meeting ideas, decisions, or action items? It can be a tedious and time-consuming process if it's a back-and-forth email conversation.

Let's look at how sharing a notebook with your colleagues can help simplify this process.

Sharing a notebook

If you are creating a new notebook from the OneNote app, you get to choose where you want the file saved. To share a notebook, it needs to be saved in a cloud document library such as OneDrive or SharePoint. To do this, you will need to sign into the app with your Microsoft 365 account and then you can connect the cloud libraries to OneNote that you want to create the notebook in.

If OneDrive and SharePoint are new to you, consider the OneDrive library to be the "Me" files. In other words, they are my files until I choose to share them with a few other colleagues for drafting something quickly or working on a short-term project file.
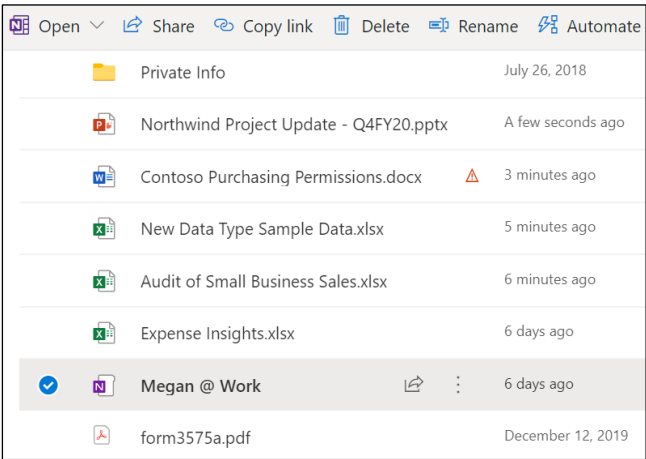
Figure 1: OneDrive Document Library files

If the file is something a group needs to work on more formally, or it's a long-term project, then save it in a SharePoint library — which you can think of as the "We" files. Everyone that is a member of the SharePoint site automatically has access to the files in the document library.

If you work in (or plan to work in) Microsoft Teams, a notebook and other files you access from a team channel are really saved in a connected SharePoint document library. Each channel is a named folder within the document library, making it easy to find files by channel if you are working directly in the SharePoint Online site.

Figure 2: The File tab, backstage area, New panel menu that includes OneDrive and SharePoint added as places

While creating a new cloud notebook, if you choose to save it to your OneDrive library, you'll be prompted to give the

notebook a name, and then be prompted to invite others to the notebook. You can enter names (if they are within your organization) or email addresses (if they are external to your organization).

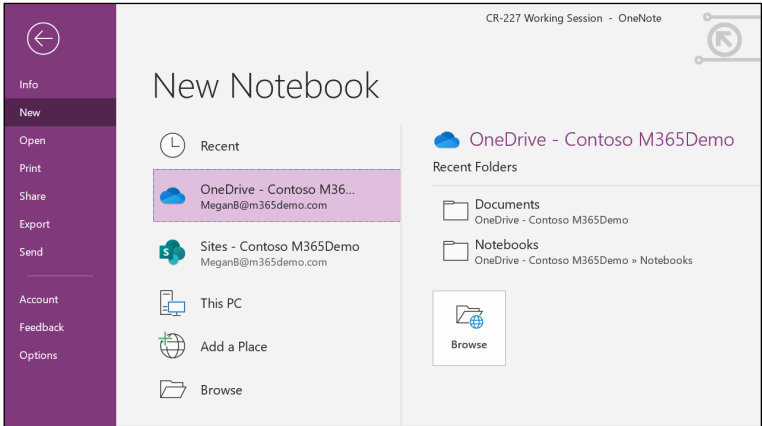You don't have to invite everyone during this process. You can always invite them later by going to the File tab, Share menu, and then selecting Share with people.

If you choose to save the notebook to a SharePoint document library, you will be prompted to enter a name for the notebook as before. However, you won't be prompted to invite people to the notebook as access will be managed based on who is a member of the SharePoint site that the document library is associated with.

A cloud notebook can also be created directly from a document library.

To create a notebook directly from the OneDrive app, simply follow these steps:

- From a browser go to the OneDrive app

- Navigate to the folder level where you want to create the notebook

- From the ribbon select New and select Notebook from the list

- Give the notebook a name

- To share with others, select the Share command and enter their names or email addresses

To create a notebook directly from a SharePoint Online site document library, do the following:

- From a browser go to the SharePoint app

- Navigate to the SharePoint site, then select the document library where you want to create the notebook

- From the ribbon select New and select Notebook from the list

- Give the notebook a name
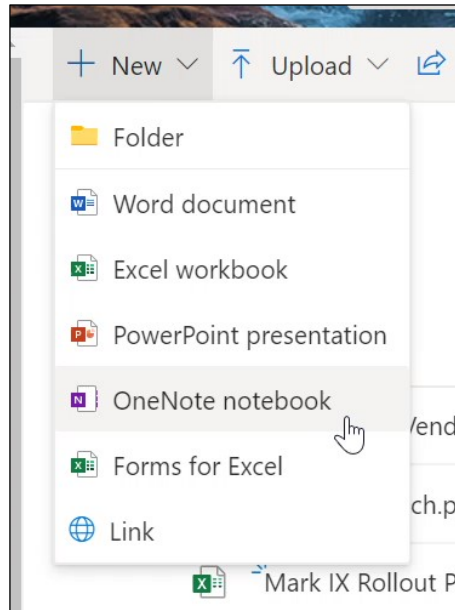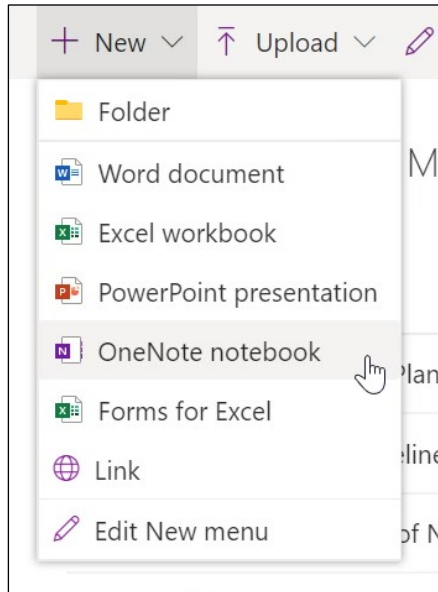
Figure 4: SharePoint Document Library with the New Context menu displayed

A cloud notebook is a happy notebook

This is the icon indicating the Sync status for a cloud notebook in OneNote for the web and OneNote for Windows 10.

Collaborating in a notebook

Imagine you and a group of colleagues are working on a project together and you need a shared space to view resource files and make notes about these files, meetings, and decisions. Instead of having shared files that are scattered across chats, emails, and folders, a shared notebook can provide one place for all your notes and for everyone to collaborate.

No matter where each colleague is geographically located, everyone can view and edit pages of a notebook at the same time. It's what's known as co-authoring, or real-time editing.

You can be editing the meeting decisions notes area of a page while another colleague edits the action items further down the page and another colleague inserts a PowerPoint presentation in another section of the notebook. All these co-authored notes are saved and synced automatically.

Maybe you've been out of town for a few days. When you return to work, you need to catch up on what you have missed. If so, the History ribbon offers a lot of features to help.

By selecting the Recent Edits command, a time frame such as Today, Yesterday, or Last 7 Days can be selected. Any recent changes to the notebook are displayed in a Search Results panel, with links to each of the edited content matches. The edited content will be highlighted in yellow on the page.
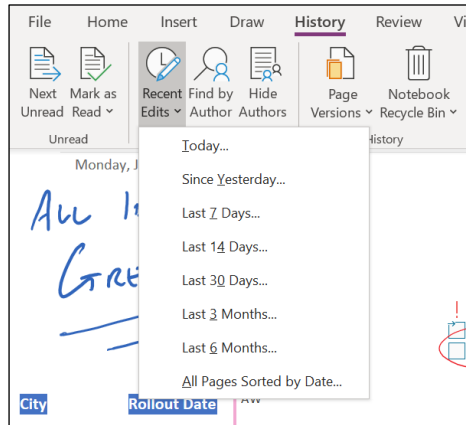
Figure 5: Recent Edits context menu

By selecting Find by Author from the same History ribbon, you can also view who authored each note. This is a great way to see who has contributed to the shared notebook, especially if you have questions about specific notes.
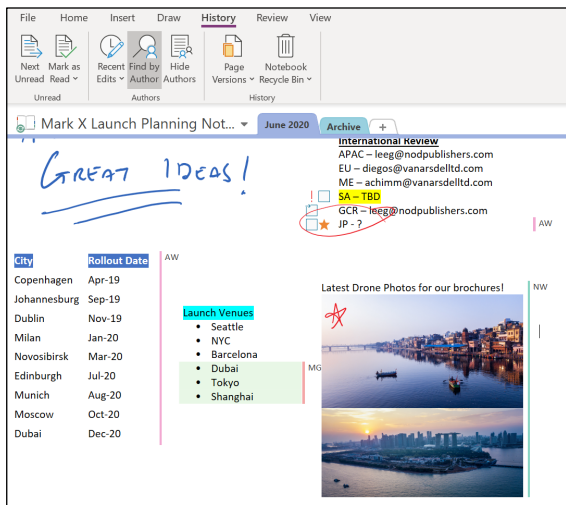

Figure 6: Find by Author enabled displaying author initials next to each note container

The Page versions feature helps you understand what has changed over time with individual versions of a page, a time lapse of notes so-to-say. It also gives you the ability to restore or delete a version. If you don't need the page version history, you can turn it off.
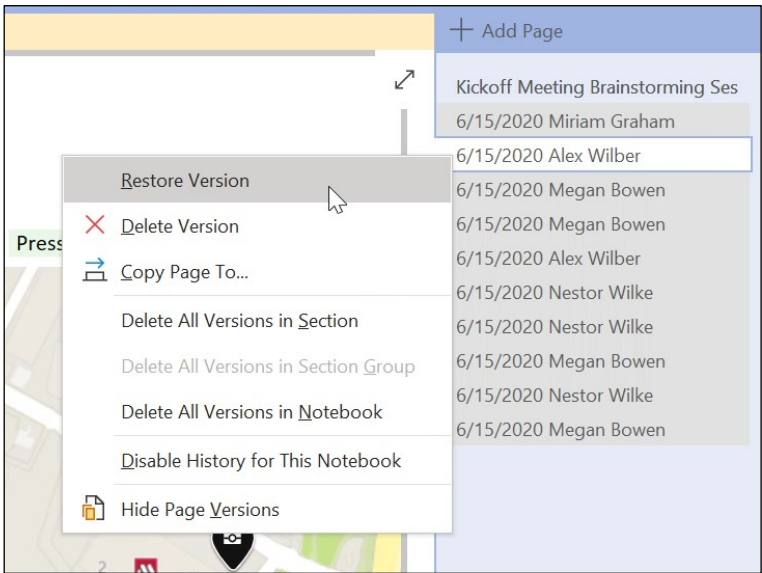
Figure 7: Page Version panel with context menu

Let's imagine you are a manager who has a one-to-one meeting with each direct report employee on a regular cadence. You need a way to share notes with each employee without other employees accessing those notes. This can be managed in a single notebook by protecting each employees section with a different password. Now you and each employee have a collaboration space to work in and it's less notebooks for you to manage!

Choose your section password carefully. If you forget it, no one will be able to unlock your notes for you.

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ing Brainstormi

3:25 PM

| Rename |
| Export... |
| Delete |
| Move or Copy... |
| Merge into Another Section... |
| Copy Link to Section |
| New Section |
| New Section Group |
| Password Protect This Section... |
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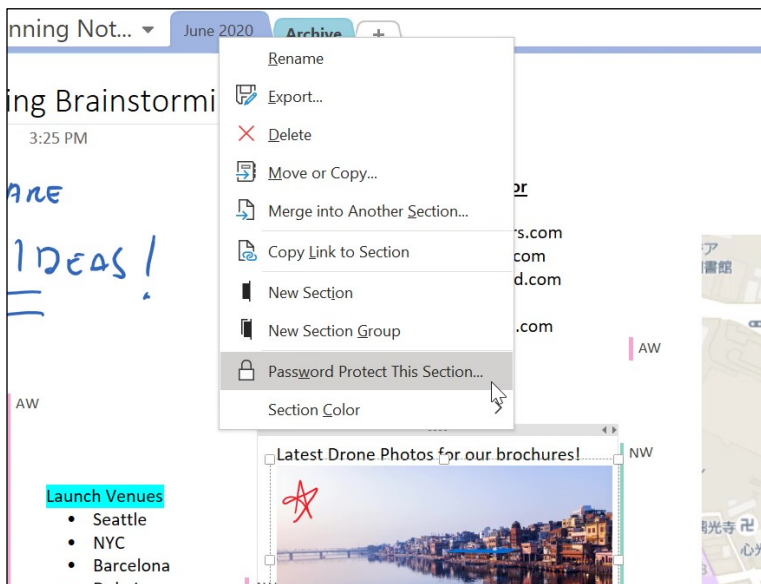
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Figure 8: Right-click context menu – Password Protect This Section

I like to lock all password-protected sections of a notebook at the same time with the Windows keyboard shortcut Ctrl+Alt+L, on the Mac keyboard this shortcut is Option+Command+L.

I mean, who doesn't like keyboard shortcuts?

Adding a notebook to a team channel

When a new team is created, you automatically get shared workspaces to make collaboration easier, these include a SharePoint site, a Planner board for tracking projects, a Power BI service workspace for data visualization, and a connected notebook for notetaking. Having these connected apps and services in a team workspace helps you and your teammates get all your work done in one place without the app and context switching that goes along with it.

Let's say you are working in a team that has channels setup for specific project work: Design, Digital Assets Web, Go to Market Plan and Research, and Development. The notebook that was automatically setup for this team can be added to each of these channels.
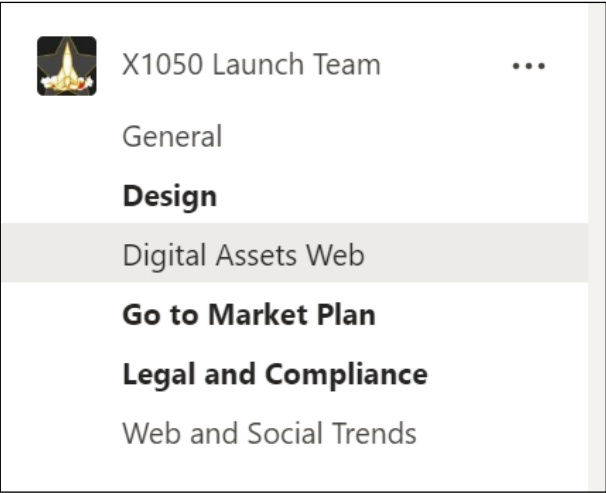

Figure 9: A team with channels

During the process of adding the associated notebook as a tab in the Design channel workspace, you can even specify what section you want to display by default. If a required section

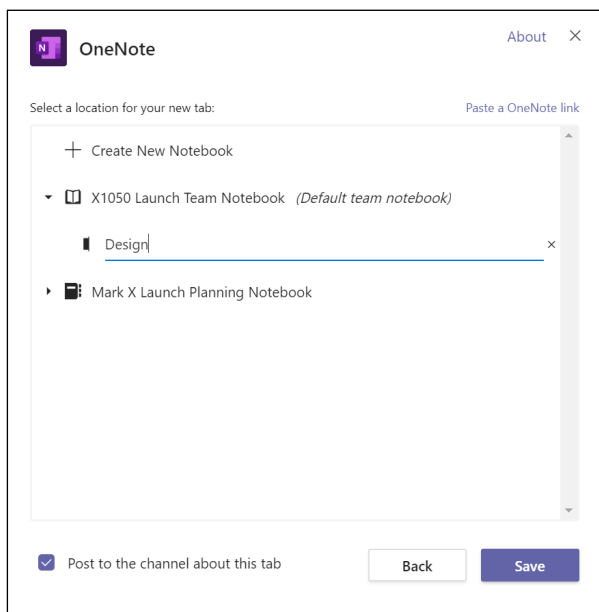hasn't been setup previously, you can just create a new one and select it.

Figure 10: Team channel Add a Tab OneNote menu

The same process can be repeated to add the same notebook to other channels with sections specific to that channel's project work open and ready for collaborative notetaking.

You can also create a new notebook or connect an existing notebook to a team. By selecting the Add a tab command, you can create a new notebook, choose a cloud notebook, such as one in your OneDrive document library, or paste a copied link for a notebook.

When you select a notebook that has been added to a channel it displays within the channel workspace area. The app that is embedded within Microsoft Teams and powering this notebook is OneNote Online. The same features and services

available in OneNote Online are available directly within the Microsoft Teams app. You and your fellow teammates can take meeting notes, insert documents, dictate spoken word notes, and more without switching to another app.
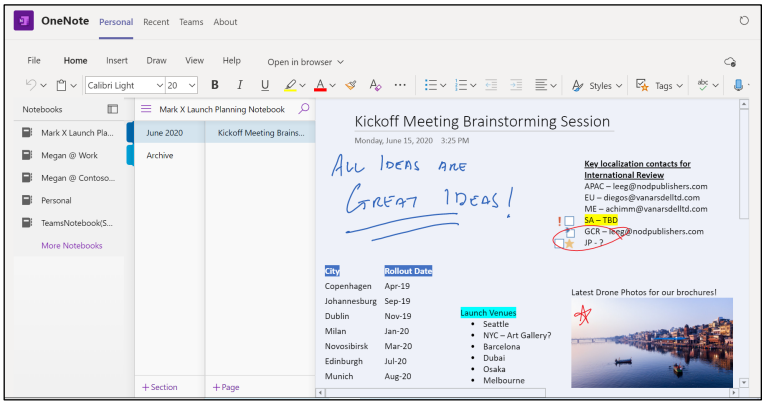

Figure 11: A notebook open in a team channel

While I'm attending a Teams meeting, I like to multi-task. If I need to take notes in a team notebook, I'll select Teams from the Navigation bar, then go to the channel and open the notebook. I don't get disconnected from the meeting. Instead, I have a picture-in-picture view where the meeting window is smaller and displayed in the upper-left corner of the app, and the notebook I opened in the channel is full screen around the meeting. If I need to go to a personal notebook or somewhere else in the Microsoft Teams app to get some information for the meeting, I can without missing a beat in the meeting (as I'm still able to see what is being shared in the meeting and hear everyone on the meeting).

By choosing which notebook is connected to a team, which section is pinned by default, and the layout for the notes, you are designing a workflow that helps your team work more productively.

Speaking of productivity, if you want to switch out of the Microsoft Teams app to OneNote Online you can quickly do this from the command available at the top of the app area. You can also switch to the desktop app (if installed on your device) and work with the rich features there.
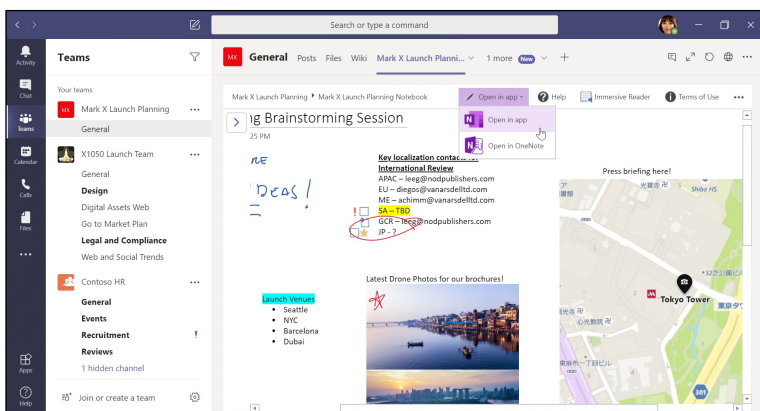

Figure 12: Open in App context menu

For years OneNote has been my favorite app and I often say "I ❤️ OneNote." I even have a hat to prove it!

Since Microsoft Teams came to town, I have been torn because I also ❤️ Microsoft Teams! Shhh… don't tell OneNote. 😉

OneNote and Microsoft Teams are even better together!

Okay, we have discussed how you can setup a OneNote notebook for team collaboration. What about working with your personal notebooks in the Microsoft Teams app? By selecting Apps from the Navigation bar, and then selecting the OneNote app, you will see a list of the notebooks you have saved in OneDrive. If you then select one of those notebooks, it will open in Microsoft Teams. From here you can view and take notes just as you would in OneNote Online.
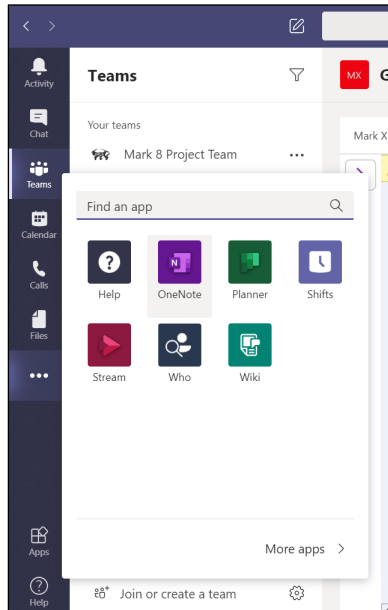
*Figure 13: The Microsoft Teams Navigation bar
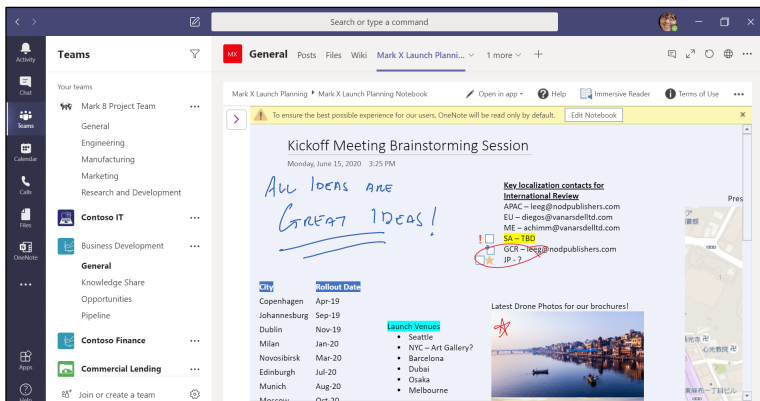with the Apps context menu displayed*

Figure 14: A OneNote notebook added as a channel tab

Working with the OneNote mobile app

For some reason, I do my best thinking while traveling on a train, in a plane, or as a passenger in a car. If you are like me, you want to quickly scribble those thoughts down before you forget them! Capturing notes in the OneNote mobile app (Android or iOS) is great for this.

From the mobile app you can snap a photo of your team's co-design session notes that are on the conference room whiteboard and insert it in a notebook page.
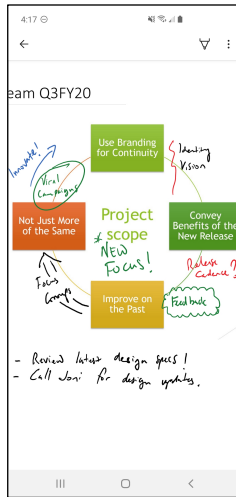
Figure 15: Mobile app with a notebook page that displays an inserted SmartArt workflow image with digital ink notes

During a lunch meeting with a client you can take handwritten notes with a tablet and stylus.
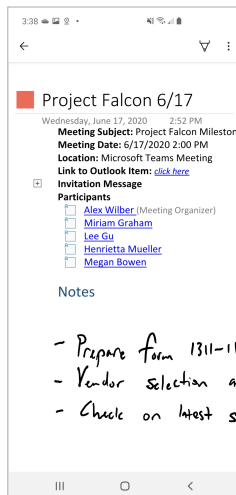

Figure 16: The OneNote mobile app displaying a page with inserted meeting details and digitally inked notes

While sitting in the airport you can send a page of notes by Outlook or another app to a colleague.

Sticky Notes are also part of the OneNote mobile app. It's the digital version of those paper sticky notes you may have scattered around your monitor and all over your desk. Sticky Notes are a great way to capture quick notes like a phone number, address, or office supplies list. You can share these by text message or another app, and delete them when they are no longer needed.
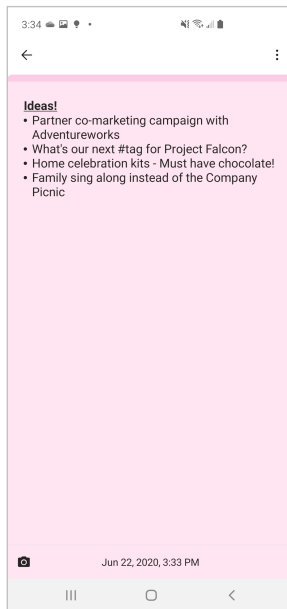

Figure 17: A sticky note in the OneNote mobile app

To learn how to sync your sticky notes, watch this video.
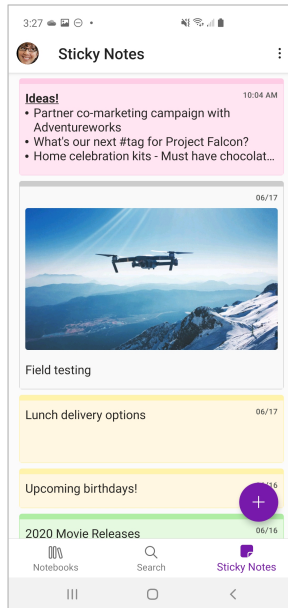
https://aka.ms/StickyNotesVideo

Figure 18: A list of sticky notes in the OneNote mobile app

Have you checked out the camera feature within the OneNote mobile app (Android or iOS)? I like to use this when I attend conferences and other events. From a notebook page select the camera feature, then choose what you are capturing; a whiteboard (great for getting a snapshot of a presentation slide even when you are in the back corner of the room), a document, or a photo. Based on this choice the app determines how to crop, flatten the image, get the best lighting, etc. Once the image is captured it is inserted into the notebook page.

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://www.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 Meeting Notes
https://aka.ms/ONMeetingNotes
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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