



Microsoft 365

OneNote and Planner

Welcome to M365 OneNote and Planner

BE PRESENT
Multi-tasking is a myth



CLOSE EMAIL
They'll be there for you later.



BE CURIOUS
Ask questions and be interested in what others have to say.



RAISE YOUR HAND
Raise your hand for real, or virtually, or post a smiley face or thumbs up.



PHONE AWAY
Move it out of reach so you won't be distracted.



TAKE NOTES
Capture important key points as you learn.



SUGGEST IT
If you have any great ideas, share them.



ENGAGE
Participate and engage with others. It may not be your thing, but it may help them to learn.



What You'll Learn Today

Overview of Microsoft OneNote and Planner

- **Topics covered include:**
 - Overview of Microsoft OneNote
 - Notetaking Best Practices
 - Overview of Microsoft Planner
 - Benefits of using Planner for task management

Lesson 1

Introduction to OneNote in M365

- Define Notebooks, Sections, Pages, and Tags
- Create, Organize, and Search Notes Within a OneNote Notebook



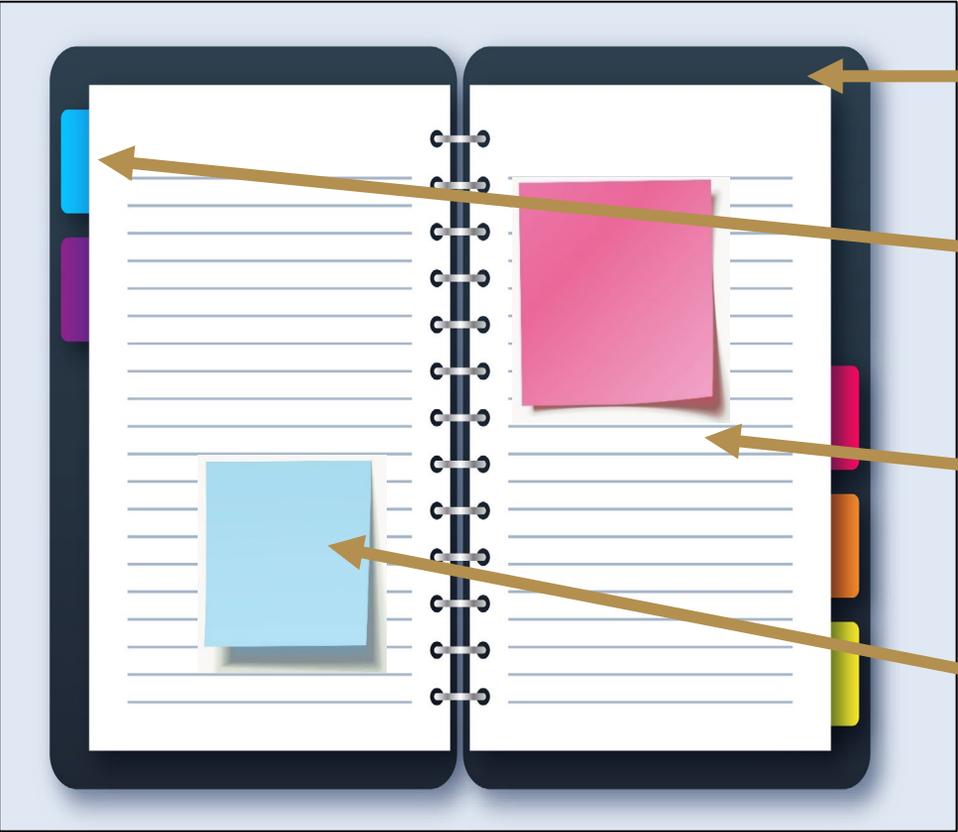
Examples of OneNote Notebooks

- Project Overview
- Meeting Notes
- To-Do List
- Daily Work Schedule
- Weekly Planner
- Quarterly Planner
- Time Management
- Work Notebook



OneNote Structure

Typical Notebook Structure



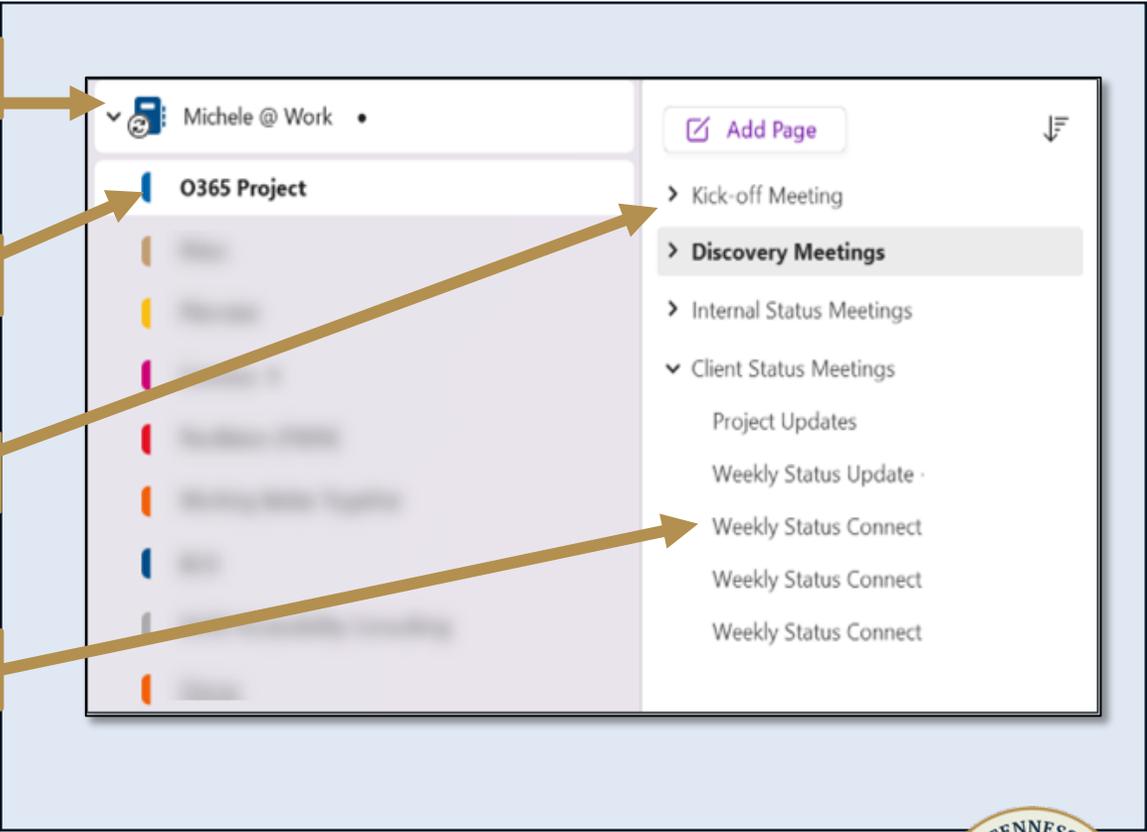
Notebook

Section

Pages

Sub-pages

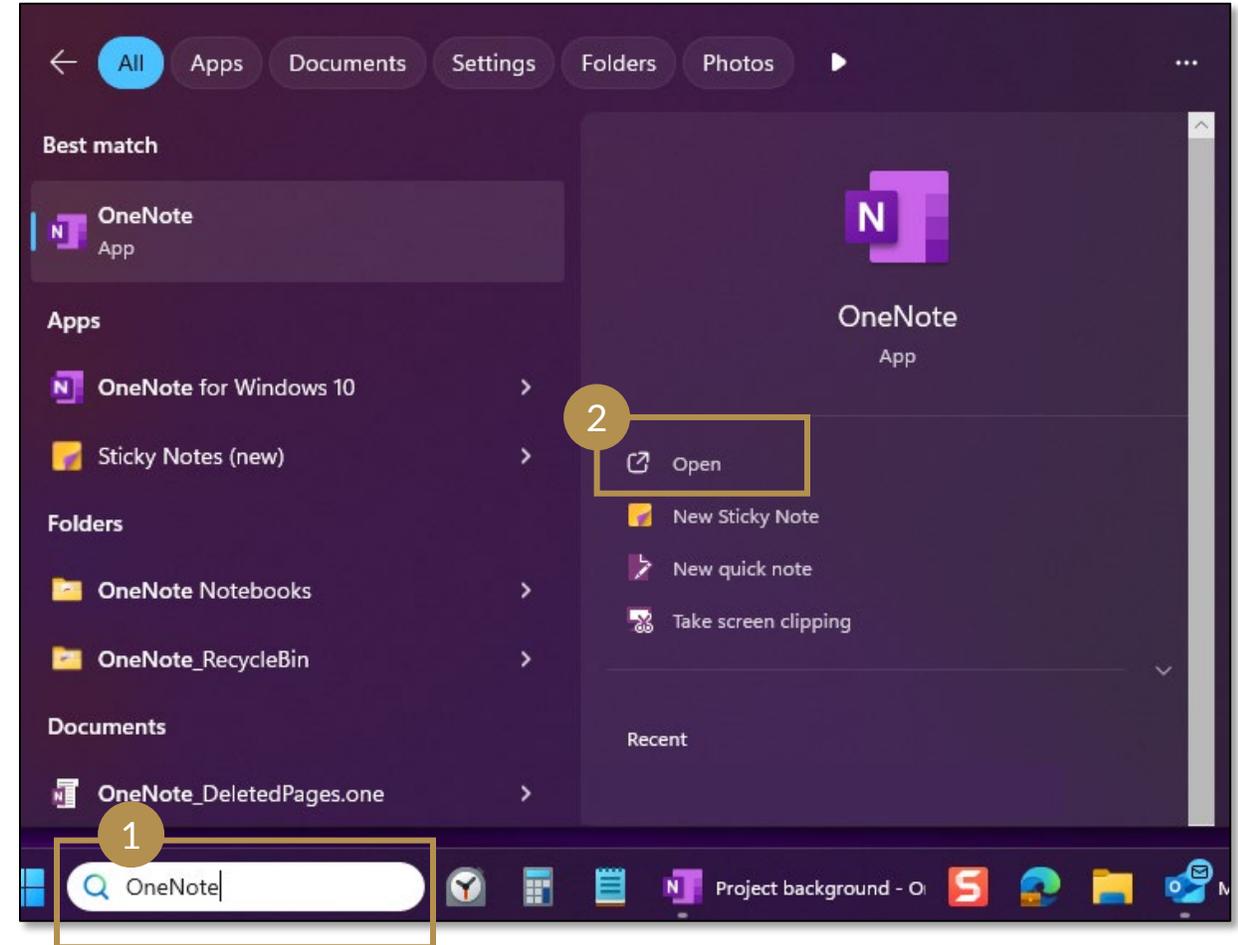
OneNote Notebook Structure



Accessing OneNote

From the Desktop

1. Type **OneNote** into the Windows search bar.
2. Click **Open**.



OneNote Navigation

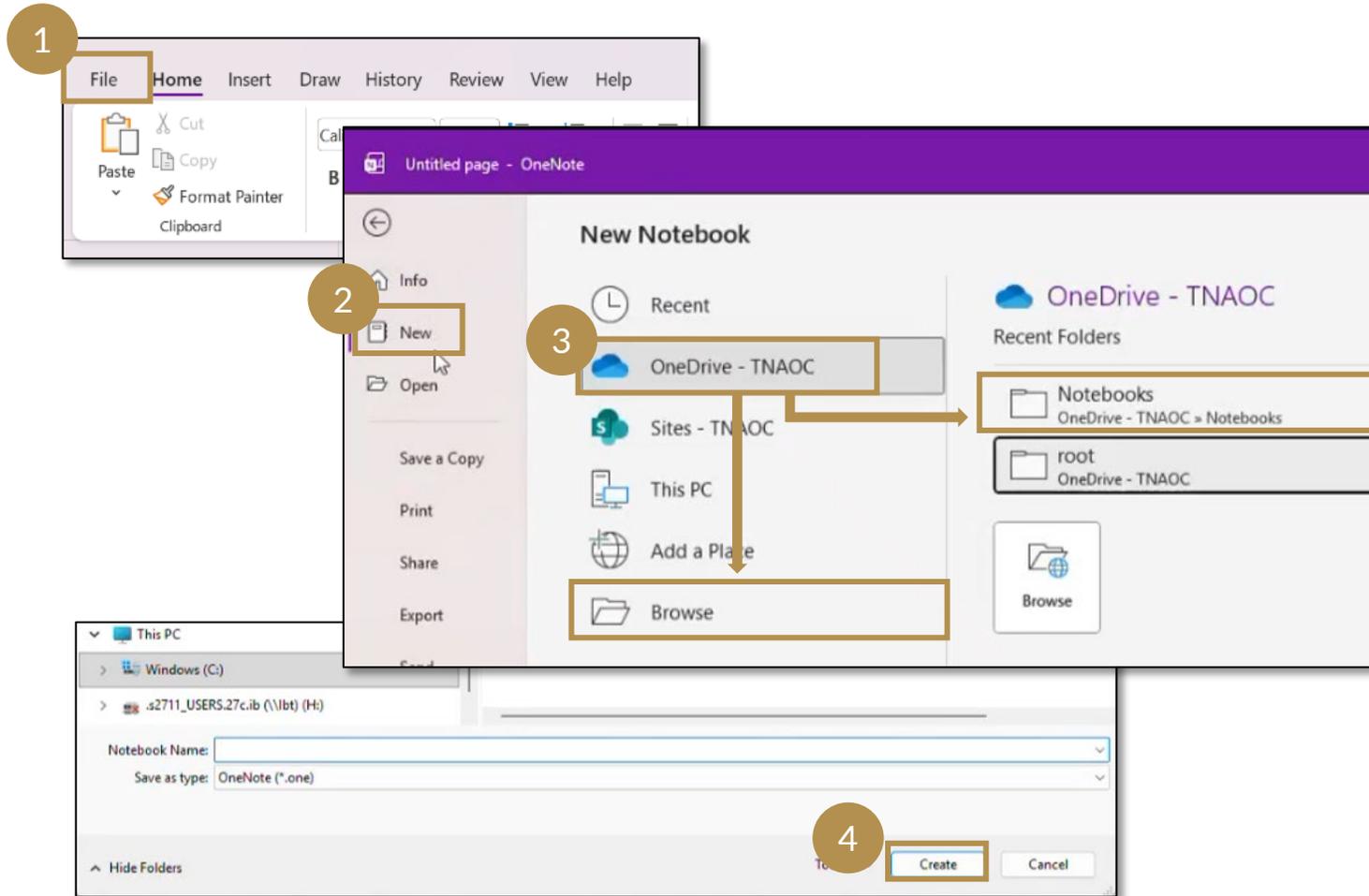
The screenshot shows the Microsoft OneNote interface with several elements highlighted by numbered callouts:

- 1**: Points to the top menu bar (File, Home, Insert, Draw, History, Review, View, Help).
- 2**: Points to the ribbon area, specifically the Clipboard and Basic Text groups.
- 3**: Points to the left sidebar (Notebooks) showing a list of notebooks like 'Michele @ Work' and 'O365'.
- 4**: Points to the vertical section tabs within a notebook, such as 'Development' and 'Schedule'.
- 5**: Points to the horizontal section tabs at the top of a page, including 'Development' and 'Schedule'.
- 6**: Points to the page list on the left side of a page, showing sections like 'Course Outlines' and 'Course Presentations'.
- 7**: Points to the main content area of a page, showing a page titled 'Individual Productivity' with a document icon and text.

1. Menu Tabs
2. Ribbon
3. Notebook
4. Vertical Section Tabs
5. Horizontal Section Tabs
6. Pages and sub-pages
7. Page content



Creating a New Notebook



To create and save a New Notebook, you must first choose a location for it to be stored in.

1. Select **File**
2. Click **New**
3. Select **OneDrive > Notebooks** or **Browse**.
4. Name the Notebook, then click **Create**.



Lesson 1

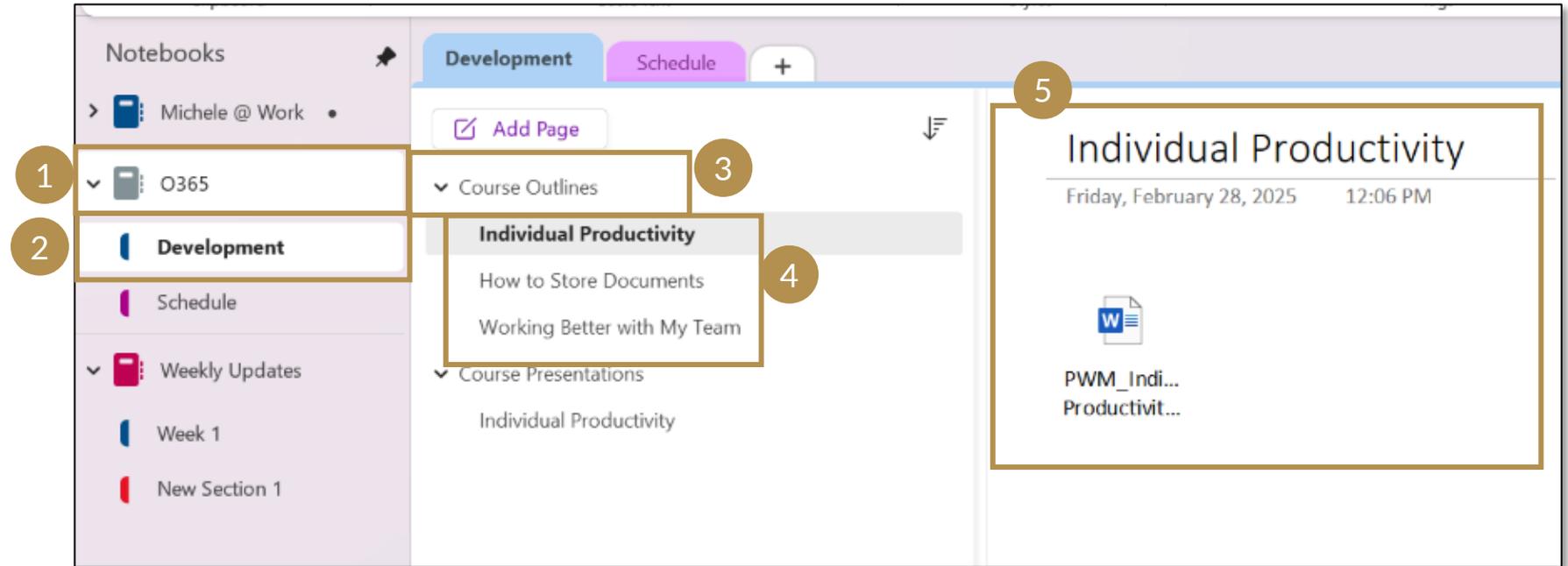
DEMO - Introduction to OneNote in M365

- Notebook Structure
- Ribbon
- Search
- Share
- Create a Notebook
- Add Section, Pages, Sub-pages
- Note Content

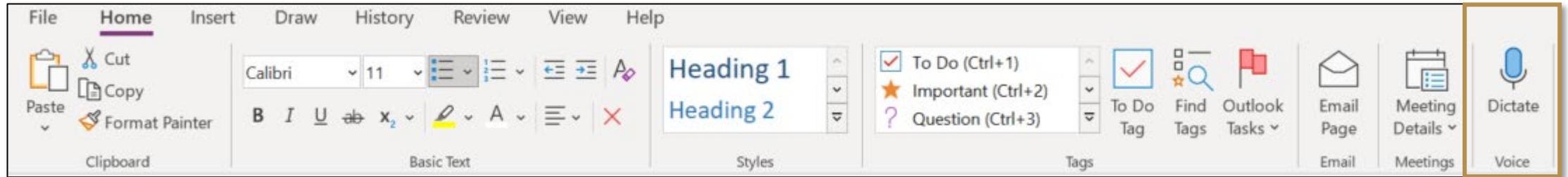


Notebook Structure

1. Notebook
2. Section
3. Page
4. Sub-pages
5. Note Content



The Ribbon



- **Format** your page.
- Use **Dictate** to add text.



Search

The screenshot displays the Microsoft OneNote application interface. At the top, the ribbon includes tabs for File, Home, Insert, Draw, History, Review, View, and Help. The Home tab is active, showing various editing and formatting options such as Paste, Copy, Format Painter, font settings (Calibri, size 11), and text styles (Heading 1, Heading 2). On the right side of the ribbon, there are icons for To Do Tag, Find Tags, Outlook Tasks, Email Page, Meeting Details, and Dictate. Below the ribbon, the left sidebar shows a list of notebooks: Michele @ Work, O365, Development, Schedule, Weekly Updates, and New Section 1. The main content area is titled "Individual Productivity" and shows a document with the following content:

- Course Outlines
 - Individual Productivity
 - How to Store Documents
 - Working Better with My Team
- Course Presentations
 - Individual Productivity

A search bar labeled "Search Notebooks" is highlighted with a red box in the top right corner of the interface.



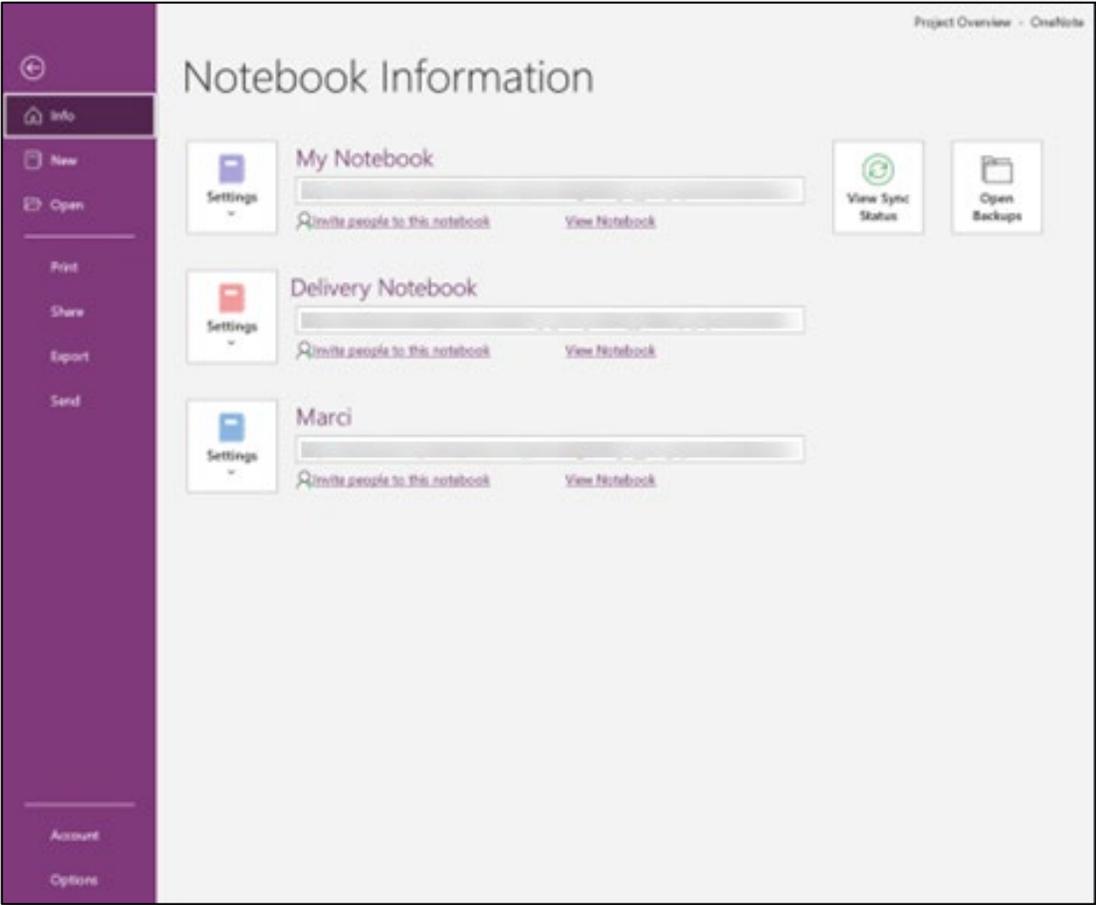
Share

OneNote offers multiple ways to share your notebook.

The screenshot displays the Microsoft OneNote application interface. The top ribbon includes tabs for File, Home, Insert, Draw, History, Review, View, and Help. The Home tab is active, showing various formatting and utility options. On the right side of the ribbon, there are buttons for Sticky Notes and a Share button. A context menu is open over the Share button, listing the following options: Share Entire Notebook, Copy Link to Notebook, Email Copy of Page, and Manage Access... The main content area shows a notebook titled 'Development' with a page titled 'Individual Productivity' open. The page content includes a heading 'Individual Productivity', a date and time stamp 'Friday, February 28, 2025 12:06 PM', and a document icon with the text 'PWM_Indi... Productivit...'. The left sidebar shows a list of notebooks, including 'Michele @ Work', 'O365', 'Development', 'Schedule', 'Weekly Updates', and 'New Section 1'.



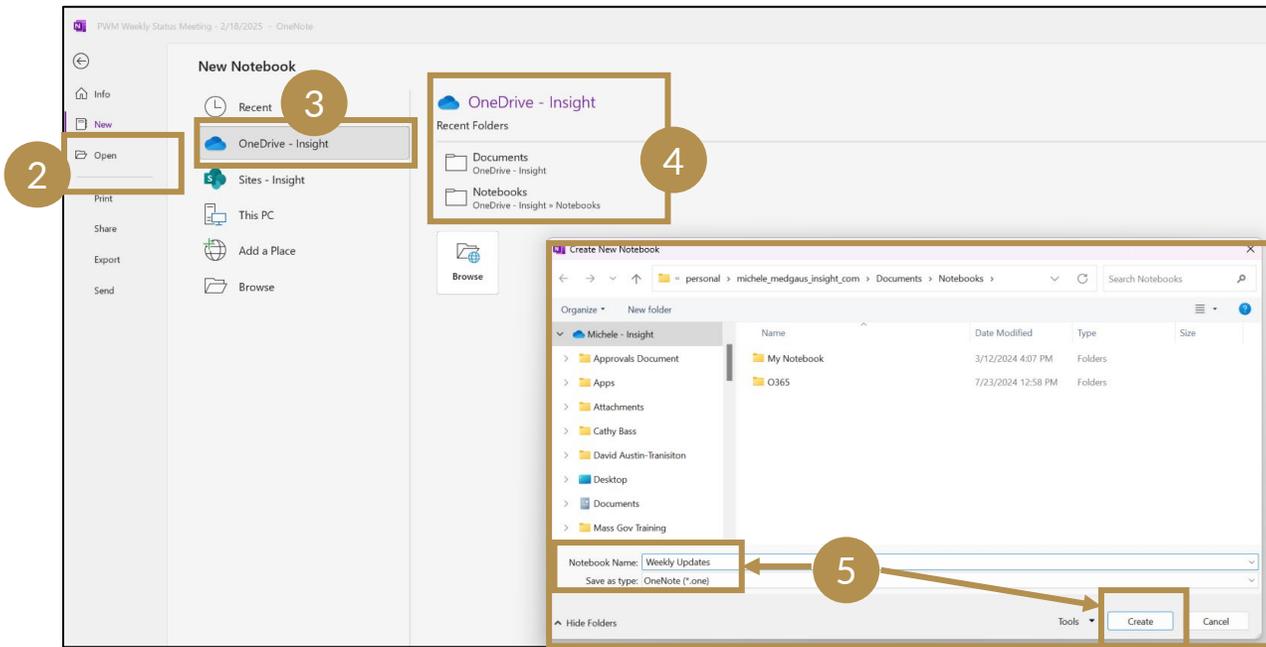
File Tab



Click the **File** tab to open other notebooks, export, share, export and much more.



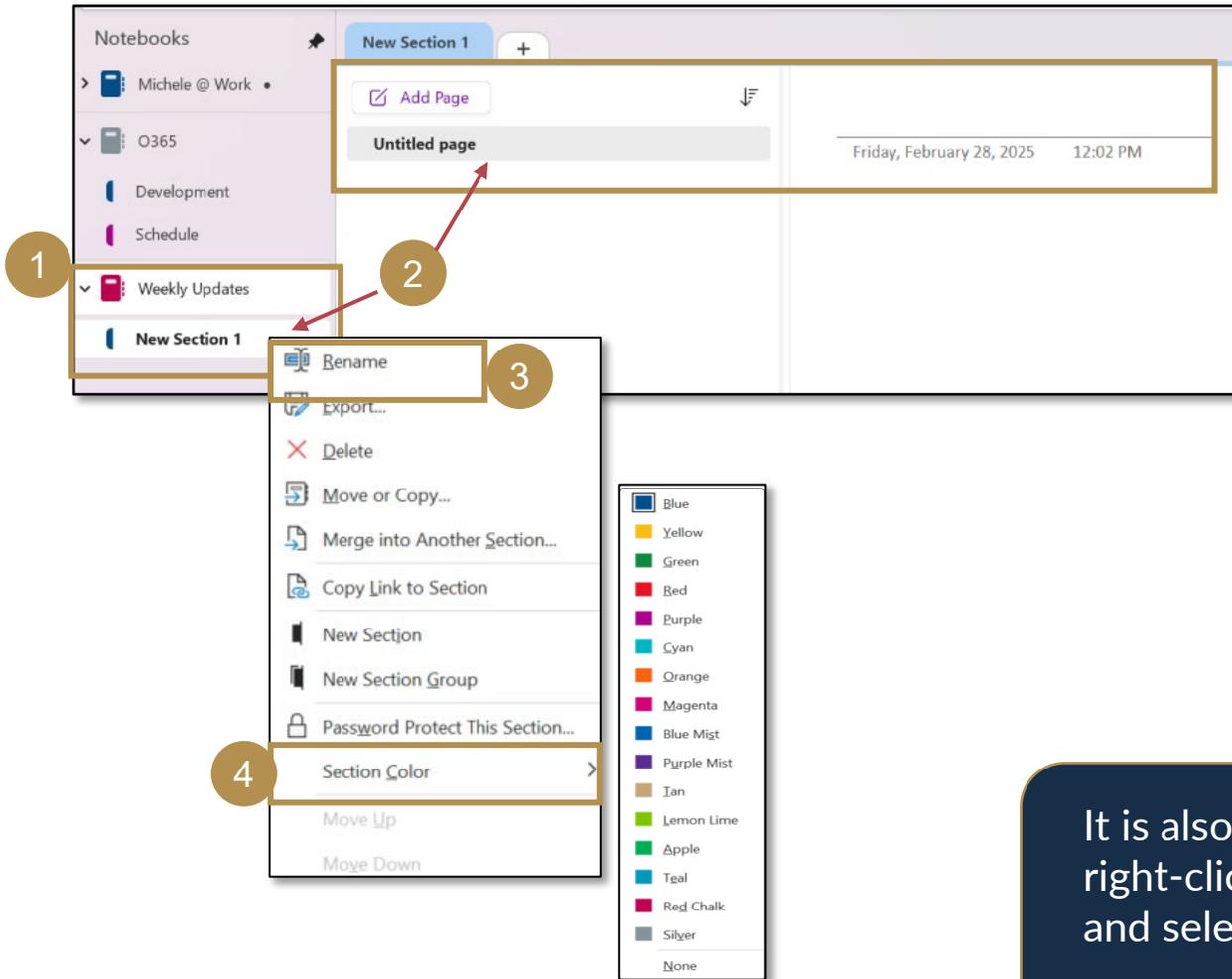
Create a Notebook



1. Click on the **File** tab.
2. Select **New** to display the New Notebook options.
3. Choose **OneDrive**.
4. Follow the prompts for the location you chose.
5. Name the new notebook and click **Create**.

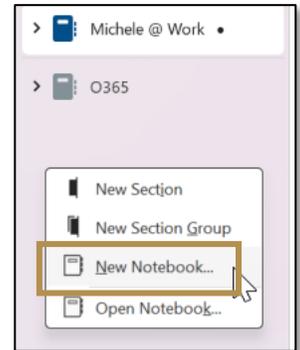


Create a Notebook



1. Once the notebook has been created, it displays in your list of notebooks.
2. Each new notebook contains one section which contains one blank page.
3. Right-click on the new section and select **Rename** from the menu.
4. To change the color of the section, select **Section Color**.

It is also possible to create a new notebook by right-clicking in the **Notebooks** navigation pane and selecting **New Notebook** from the menu.



Add Sections to a Notebook

There are two methods for adding a new notebook section to a notebook:

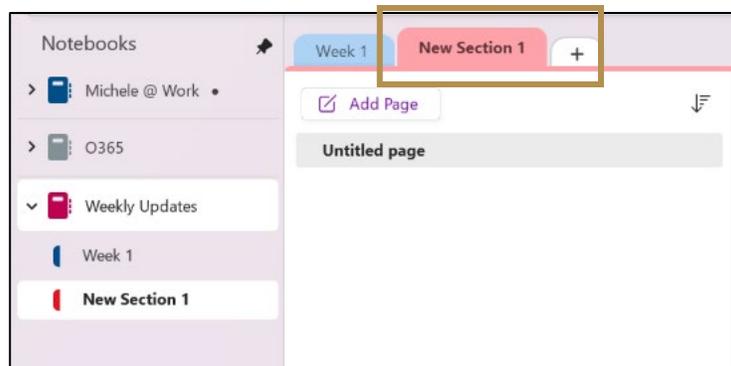
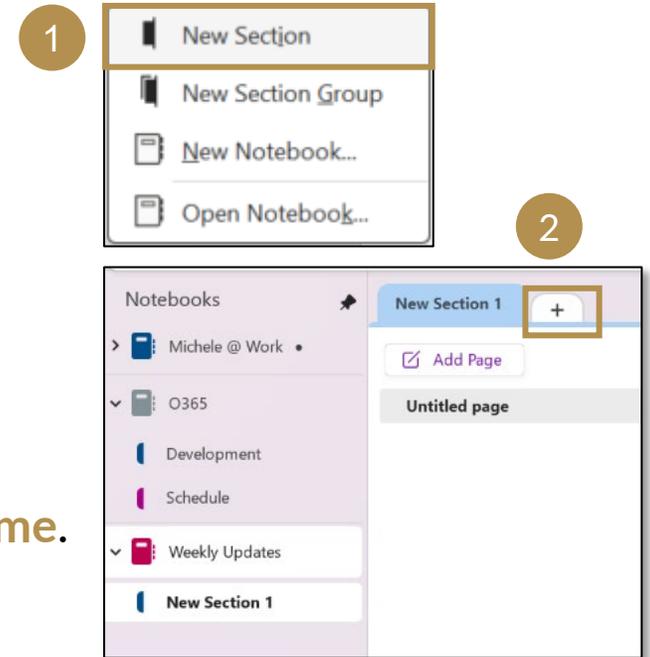
1. Right-click in the **Notebooks** navigation pane and select **New Section**
2. from the menu.

OR

2. From the horizontal tabs, click the **+** on the blank tab.

A new section tab displays with the placeholder's name **New Section**.

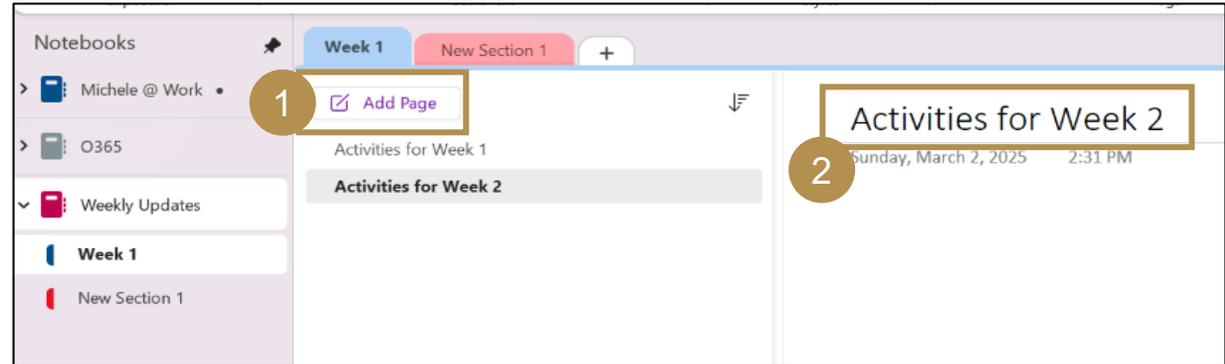
You name the new section by right-clicking the new section and selecting **Rename**.



Add Pages to a Section of a Notebook

To add a page to any section

1. Click **Add Page**.
2. Enter the page name on the top line in the main panel.



- Once you add the page, the untitled page shows up in the Pages list and the cursor is automatically at the top of the page in the main panel.
- As you start typing the name, the title shows up in the main panel.

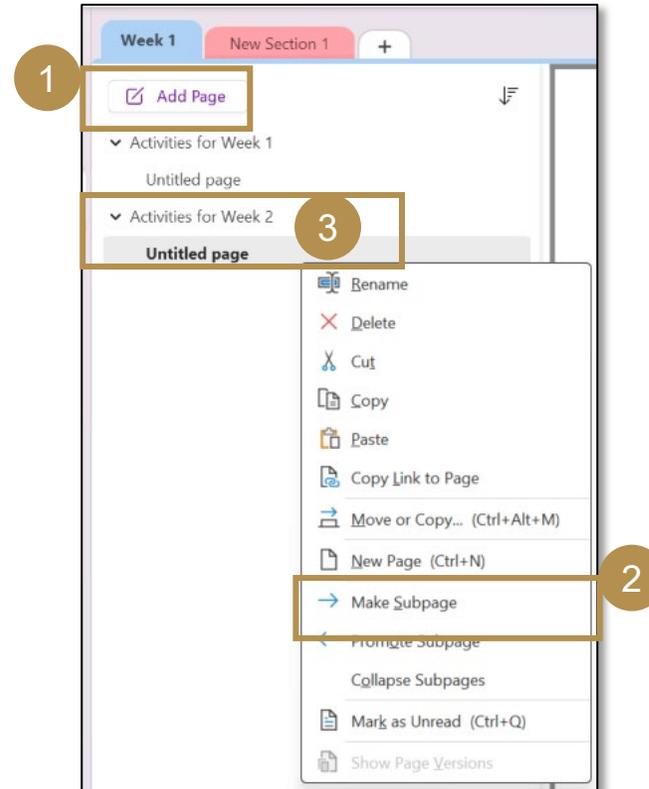


Add a Sub-Page to a Notebook

A sub-page in OneNote is a secondary page grouped under a primary page within a section of a notebook.

Open the section where you want to create the sub-page.

1. Create a new page by clicking on the **Add Page** button.
2. Right-click on the new page sub-page and select -> **Make Subpage** from the menu.
3. The new page will be indented under the primary page.



Lesson 2

Notetaking Best Practices

- Describe Best Practices for Notetaking
- Apply Traditional Methods and Digital Tools to Capture Detailed Notes
- Organize Notes with Tags and Keywords
- Search and Share Your Notes



Notetaking Best Practices

Keep it simple and concise: Focus on capturing key ideas and essential information rather than trying to write down everything verbatim.

Summarize in your own words: Rephrase the information in your own words to ensure you understand it and to aid memory retention.

Organize your notes: Use headings, bullet points, and numbering to structure your notes and make them easier to review.

Use visual aids: Incorporate diagrams, charts, and other visual elements to help illustrate complex ideas and improve understanding.

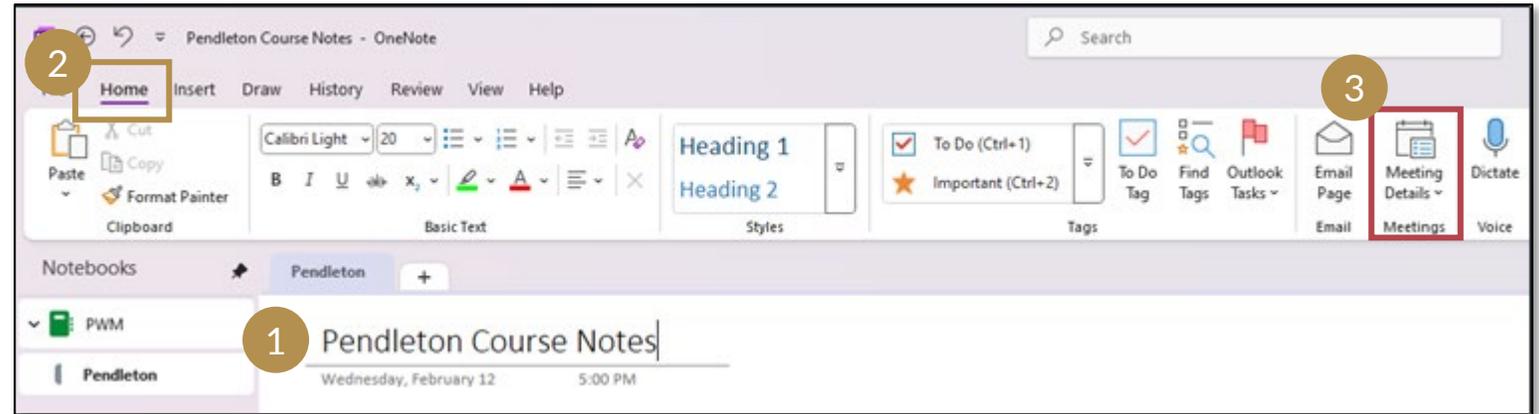
Review your notes: Look for any information that needs to be clarified.

Share your notes with others: if others attended the meeting, ask them to review your notes and confirm your understanding was the same as theirs.

Add Meeting Details

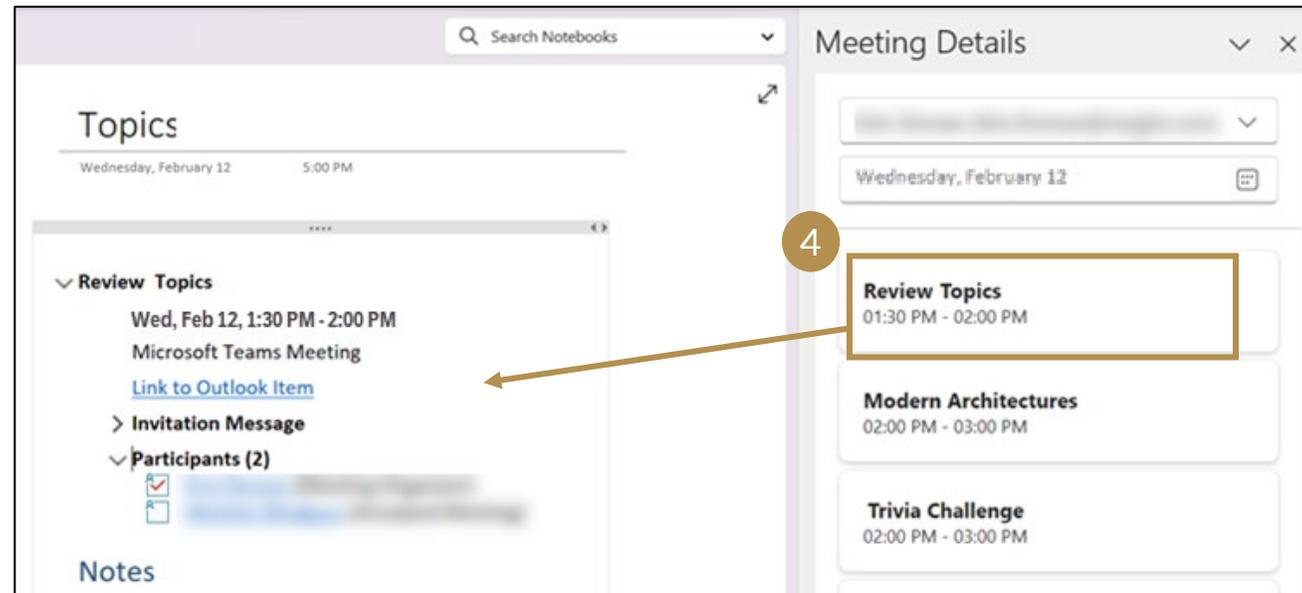
To search a notebook:

1. Create a new page in OneNote.
2. Click **Home**.
3. Click **Meeting Details**. The **Meeting Details** pane displays.
4. Select the relevant meeting.



Once details are added, view the:

- Meeting date and time
- Invitation message
- Participants – select each participant to mark as present



Share Meeting Notes Via Email

To share your notes via email:

1. Click **Home**.
2. Click **Email Page**.
 - An email is automatically created for you to the people listed as participants.
 - All content from the OneNote page is inserted into the body of the email.

The image shows two overlapping windows. The top window is an Outlook 'Message (HTML)' window. The bottom window is the OneNote application interface. In the OneNote window, the 'Home' tab is selected and circled with a '1'. In the Outlook window, the 'Email Page' button in the bottom toolbar is circled with a '2'. An arrow points from the 'Email Page' button in OneNote to the 'Email Page' button in Outlook. The Outlook window displays the following content:

Topics for Pendleton Courses - Message (HTML)

File Message Insert Draw Options Format Text Review Help

Calibri 11 B I U A

To: [Redacted]

Cc: [Redacted]

Subject: Topics for Pendleton Courses Internal/General Purpose

Topics for Pendleton Courses

Wednesday, February 12
3:00 PM

Review M365 Topics for Pendleton

Wed, Feb 12, 1:30 PM - 2:00 PM
Microsoft Teams Meeting
[Link to Outlook Item](#)
Invitation Message

Sticky Notes Share

Clipboard: Paste, Copy, Format Painter

Basic Text: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color, Paragraph Styles

Styles: To Do (Ctrl+1), Important (Ctrl+2)

Tags: To Do Tag, Find Tags, Outlook Tasks

Email: Email Page

Meetings: Meeting Details

Voice: Dictate, Transcribe

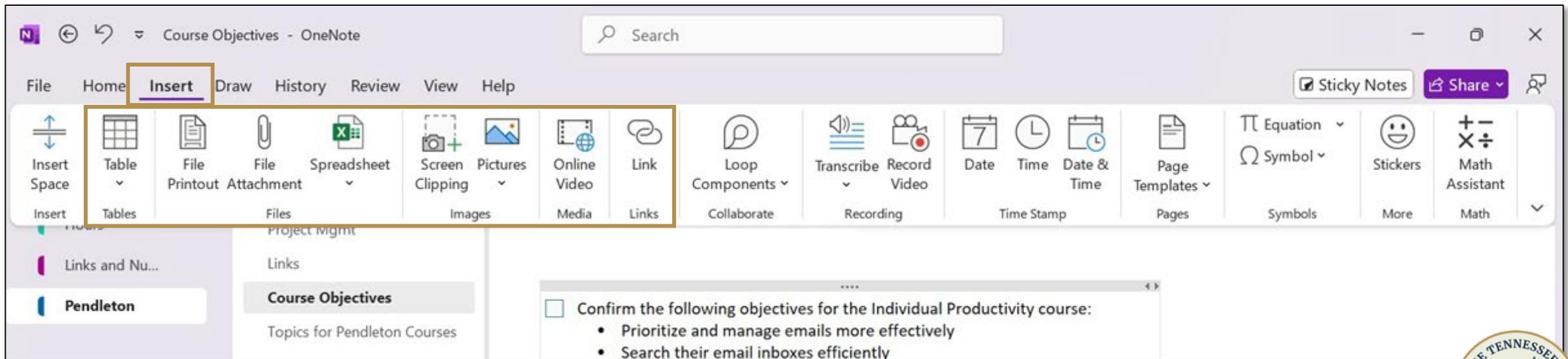
Copilot



Add Tables, Files, Spread Sheets, and Images

In addition to text, from the Insert menu, you can add:

- Tables
- File Attachments
- Spreadsheets
- Pictures, etc.



Lesson 2

DEMO - Notetaking Best Practices

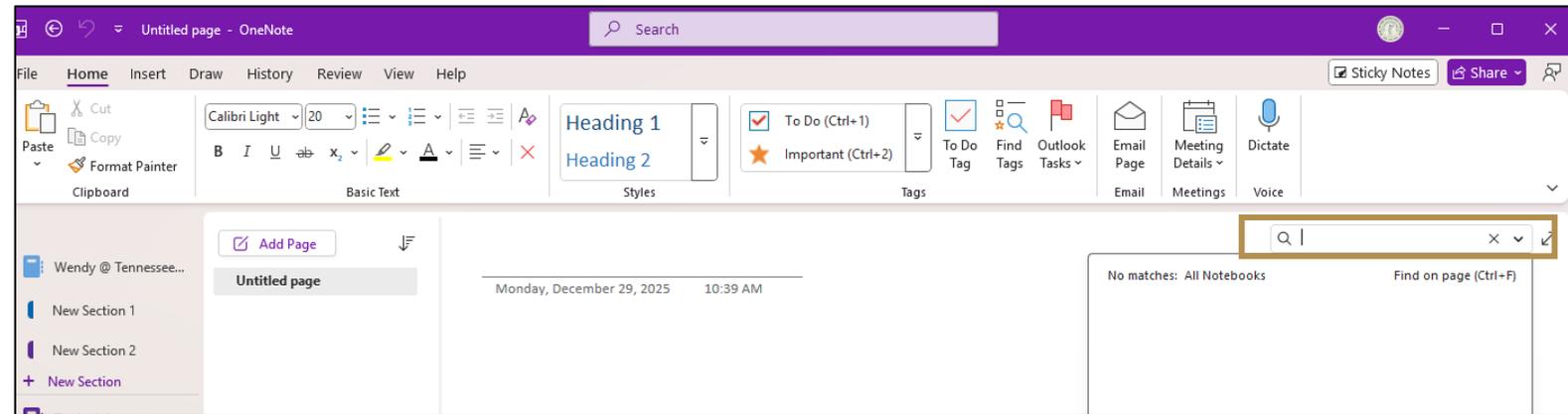
- Add Meeting Details
- Share Meeting Notes via Email
- Add Tables, Files, Spread Sheets and Images to a Page
- Search a Notebook
- Add Tags
- Search a Notebook for Tags
- Share a OneNote Notebook



Search a Notebook

To search a notebook:

1. Click the **Search Notebooks** drop-down.
2. Select the notebook, section or page you want to search.
3. Type the keyword or phrase.
4. Select the result or navigate to the highlighted text.



OneNote can also search for text in a PDF file or a graphic file.



Add Tags

To add a tag:

1. Put your cursor at the beginning of the line of text you want to tag.
2. Click **Home**.
3. Click the **Tags** drop-down.
4. Select the appropriate tag.

The screenshot shows the OneNote interface with the 'Home' tab selected. The 'Tags' drop-down menu is open, displaying a list of tags. A callout box highlights the text 'Confirm the following objectives for the Individual Productivity course: • Prioritize and manage emails more effectively • Search their email inboxes efficiently'.

Confirm the following objectives for the Individual Productivity course:

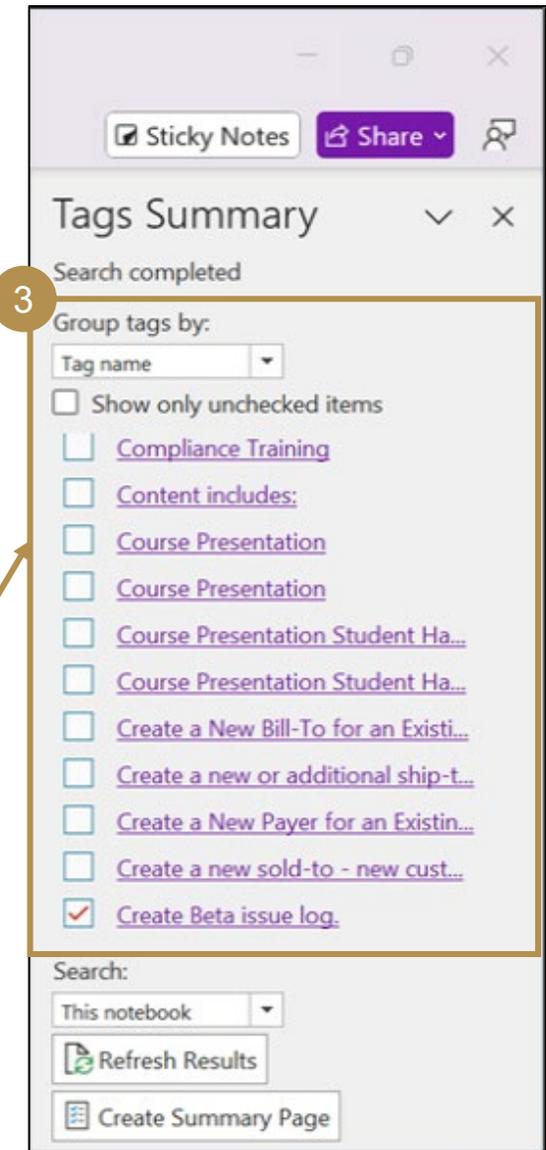
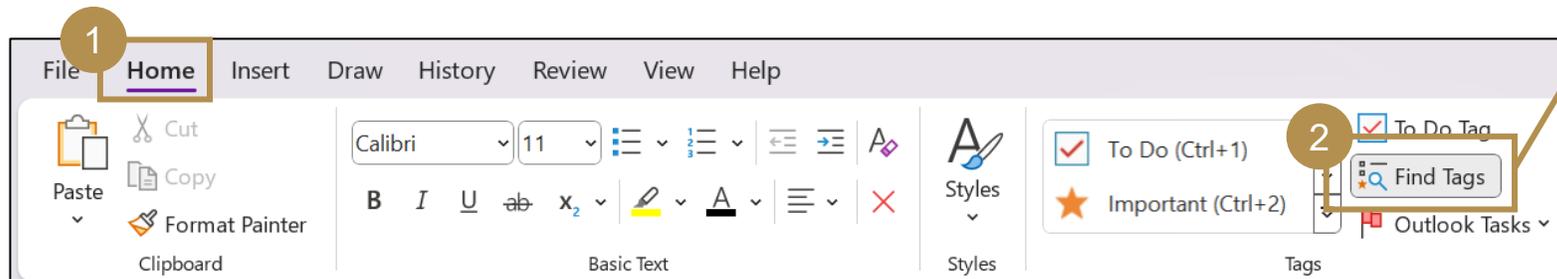
- Prioritize and manage emails more effectively
- Search their email inboxes efficiently



Search a Notebook for Tags

To search a notebook for tags:

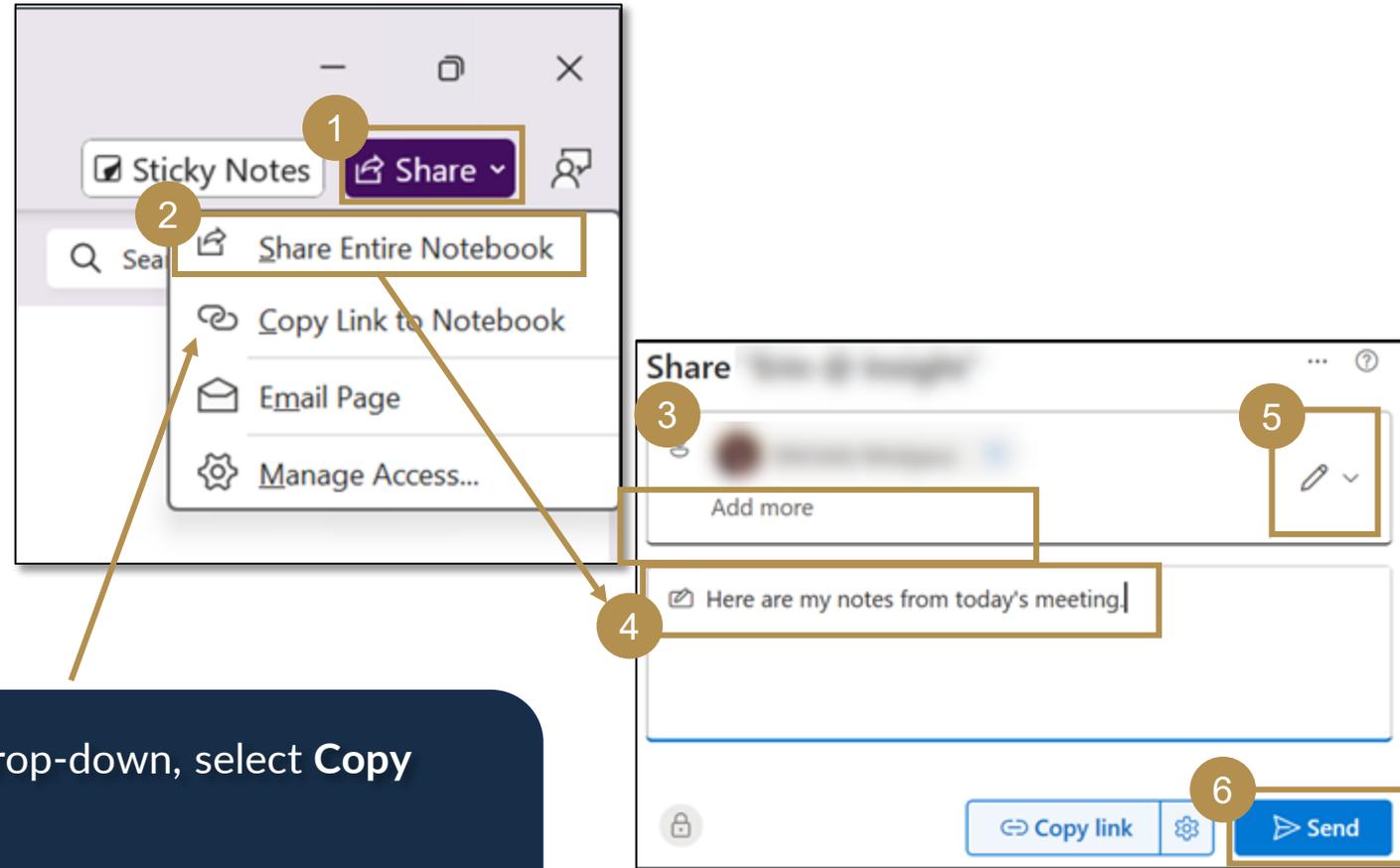
1. Click **Home**.
2. Click **Find Tags**. The **Tags Summary** pane displays.
3. Select a tag from the list to open the page that contains that tag.



Share a OneNote Notebook

To share your notes via email:

1. Click the **Share** drop-down.
2. Select **Share Entire Notebook**.
3. Select the person to share the notebook with or enter their email address.
4. Enter a message, if necessary.
5. Click **Edit** to change the sharing permissions, if necessary.
6. Click **Send**.



To share your notebook via a link, from the **Share** drop-down, select **Copy Link to Notebook**.

You can then paste this link into a chat, channel conversation, email, etc.



Lesson 3

Discover Planner Functionality

- Access and Navigate Planner
- Create a Plan
- Create and Manage Buckets and Tasks
- Use Planner Views (Formats)



What is Planner?



Planner is Microsoft's planning application, designed to help you stay on track, manage your tasks, to-dos, plans, and projects, all in one place.

- Use for personal and/or teamwork task planning
- Collaborate with your team about plans and tasks
- Provides visibility to track workload and progress
- Display charts and discuss with your team task status

Organize your workload

- Create a plan
- Invite your team
- Assign project tasks
- Drag and drop tasks
- Attach files

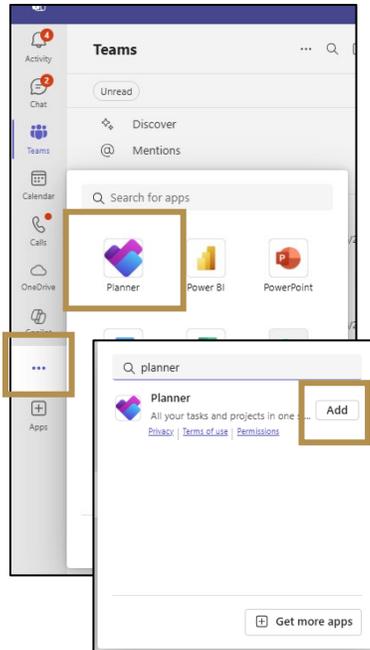


How to Access Planner

You can access Planner from Teams or from a web browser.

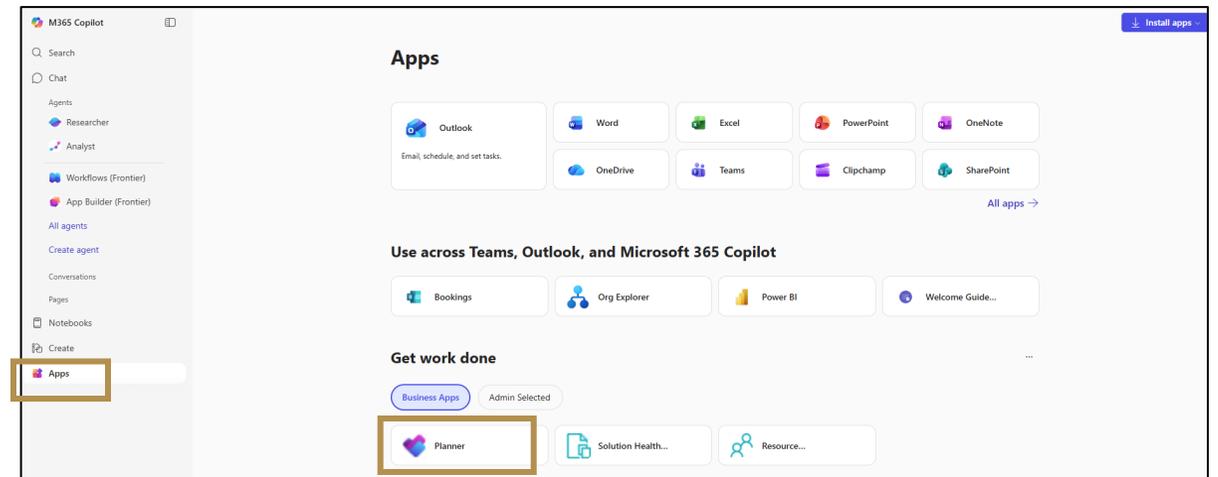
From Teams:

- Click the **View more apps (3 dots)** icon.
- Click the **Planner App**.
- Click **Add**.



From the Web:

- Type **Office 365** into your internet browser, M365 Copilot opens.
- From the Navigation Pane select **Apps** and then select **Planner**.



Lesson 3

DEMO – Discover Planner Functionality

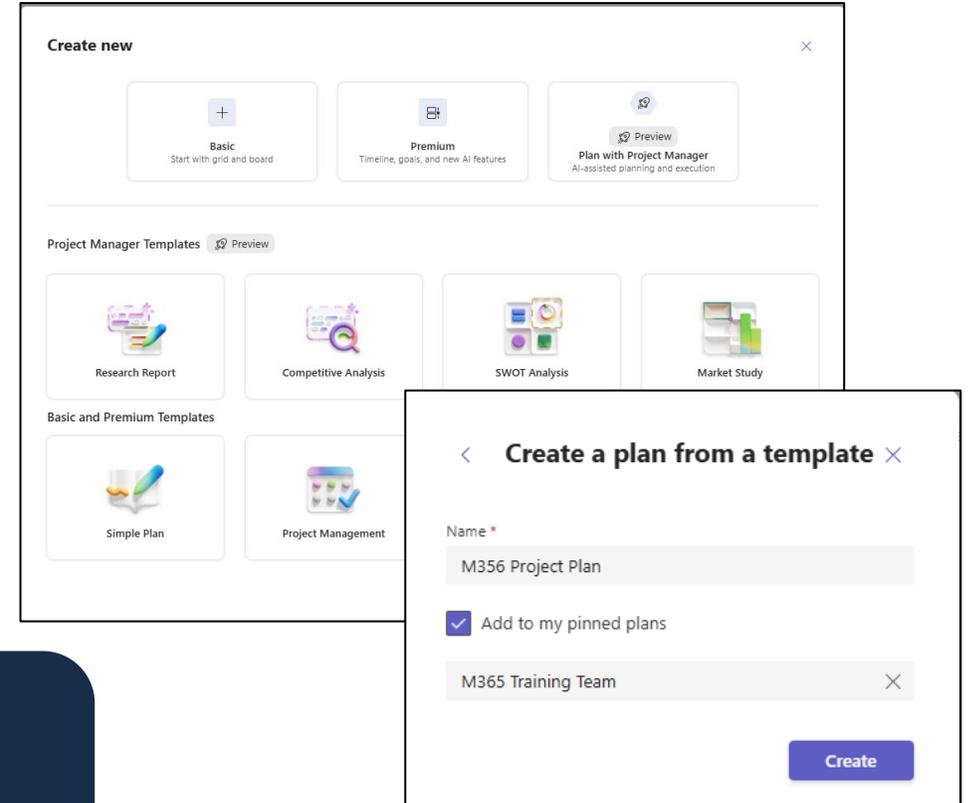
- Access Planner
- Create a Plan
- Planner Screen Overview
- Create and Edit Buckets
- Organize Tasks
- Add Additional Information to Tasks
- Schedule View



Create a Plan

Create a new plan or use a template and make it your own.

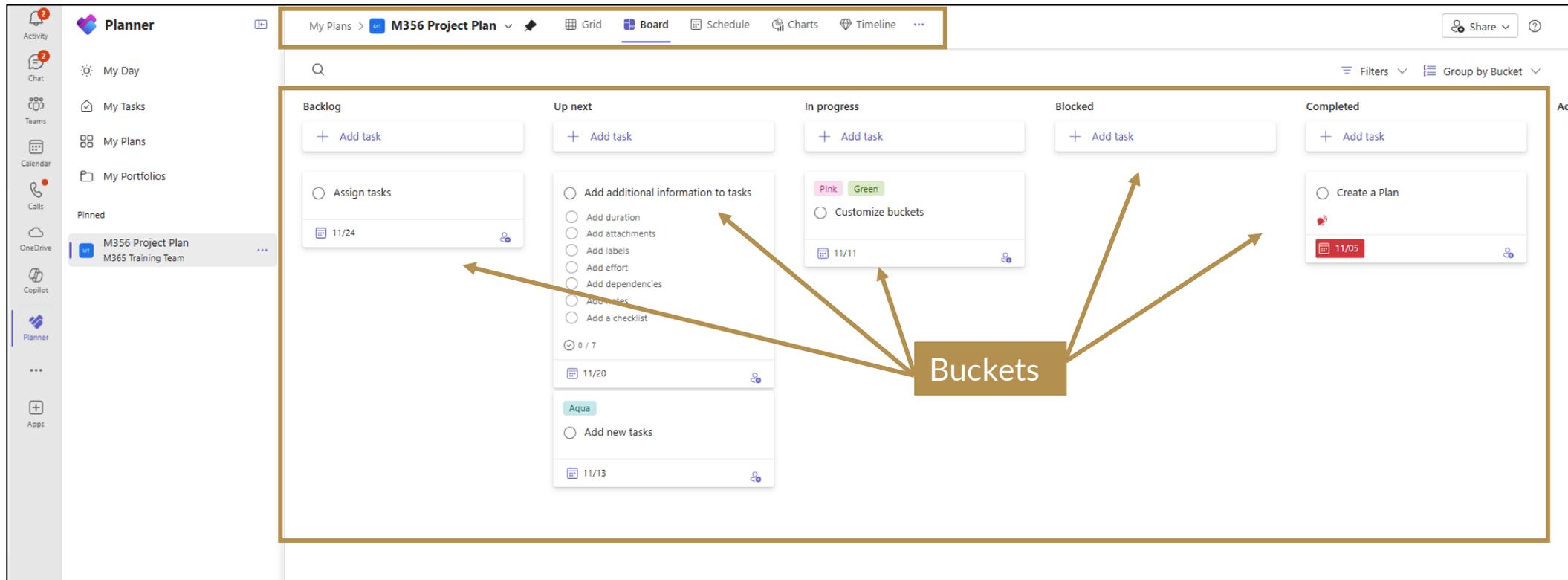
1. Select the **Planner** app.
2. Click **+ New Plan**. 
3. Select a template and click **Use Template**. 
4. Enter a name for the plan and add to an existing channel.
5. Click **Create**.



To create your own plan from scratch, click **+ Basic** instead of choosing a template. Plans can be copied by selecting the radio button **Use an existing plan from this team** and selecting a plan from the dropdown.



Planner Overview Screen



- **Grid** – List of Tasks
- **Board** – create buckets or groups of tasks, for example, Phase 1, Phase 2
- **Schedule** – calendar of tasks
- **Charts** – displays the progress of tasks in different types of graphs



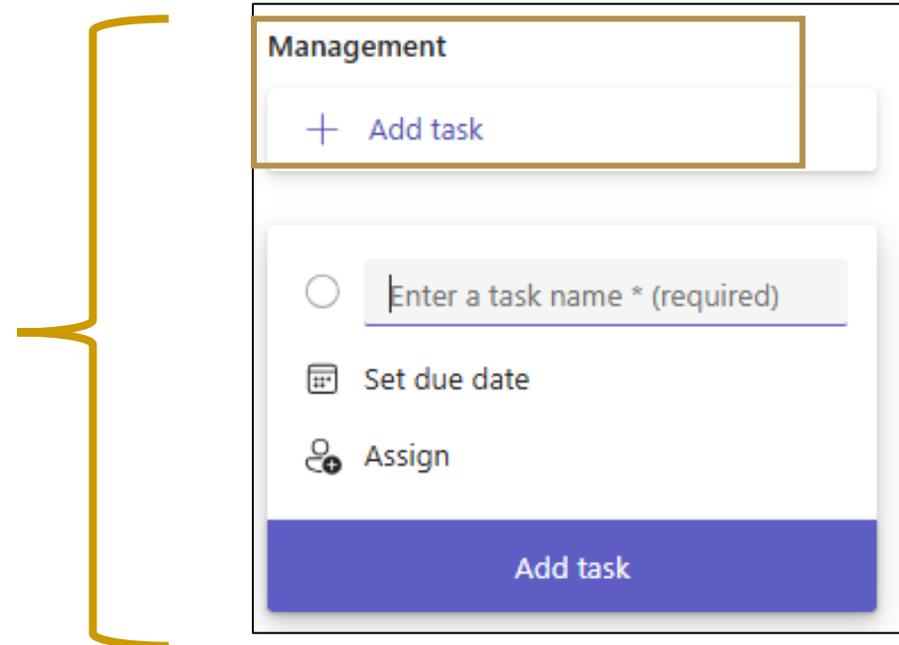
Create and Edit Buckets

A **Planner Bucket** is a vertical column that helps organize tasks into categories like phases, types of work, or departments.

Buckets can be used to represent different stages of a project, for example, scope, progress, or training.



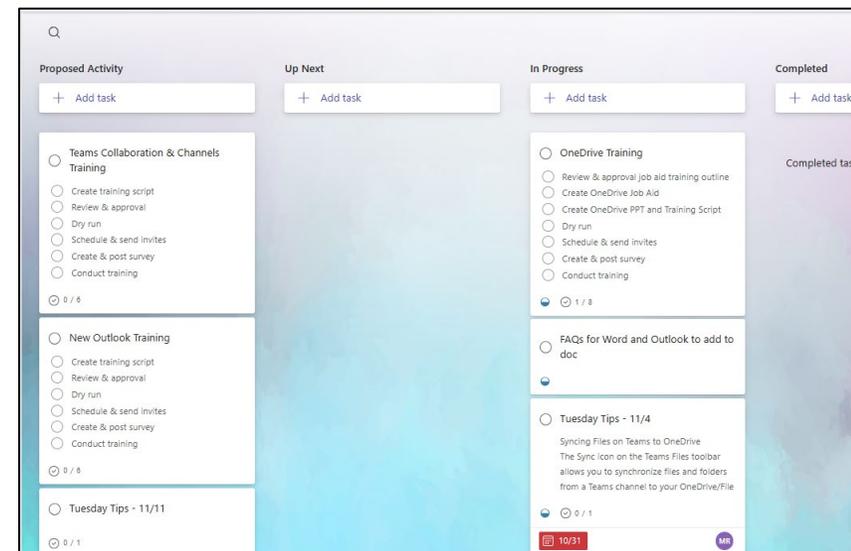
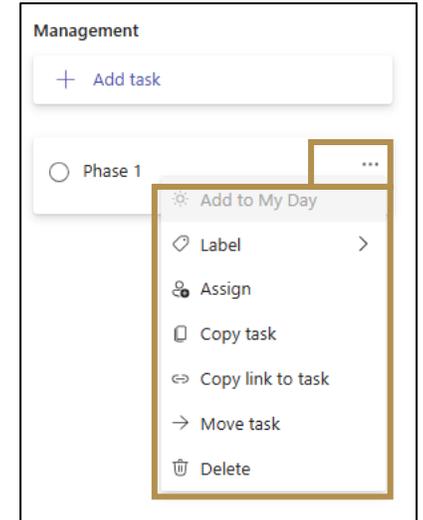
- Select **Board**.
- Scroll far-right, click **Add a new Bucket**.
- Enter a name for the bucket.
- Buckets are ready for you to add tasks
- Click **+ Add task**.
 - Enter the task details.
 - Select a due date.
 - Assign to staff.
 - Click **Add task**.



Organize Tasks

Click the Ellipses (...) and a window display for all the options to use for a task.

- Tasks can only be in one bucket at a time, but you can drag and drop tasks between buckets.
- After adding tasks, you can sort them into buckets to help break things up into phases, types of work, department, or whatever makes the most sense for your plan.
- You can also drag the title of a bucket to a new position to change the order of buckets.
- When a task is assigned to a team member or closed by a manager a notification is received by the team member via Outlook.



Add Additional Information to Tasks

To add additional information to a task in Microsoft Planner, click on the task you want to update.

The task details pane opens.

- You can enter a description, add a checklist, attach files or links, and include comments for ongoing discussions.
- You can also assign the task to team members, set a due date, and add labels for better categorization.
- These features help ensure all relevant information is easily accessible to anyone working on the task.



M356 Project Plan

Add additional information to tasks

Bucket: Up next

Progress: Not started

Priority: Medium

Start date: Start anytime

Due date: 11/20/2025

Repeat: Does not repeat

Notes: Show on card

Type a description or add notes here

Checklist 0 / 7 Show on card

- Add duration
- Add attachments
- Add labels
- Add effort
- Add dependencies
- Add notes

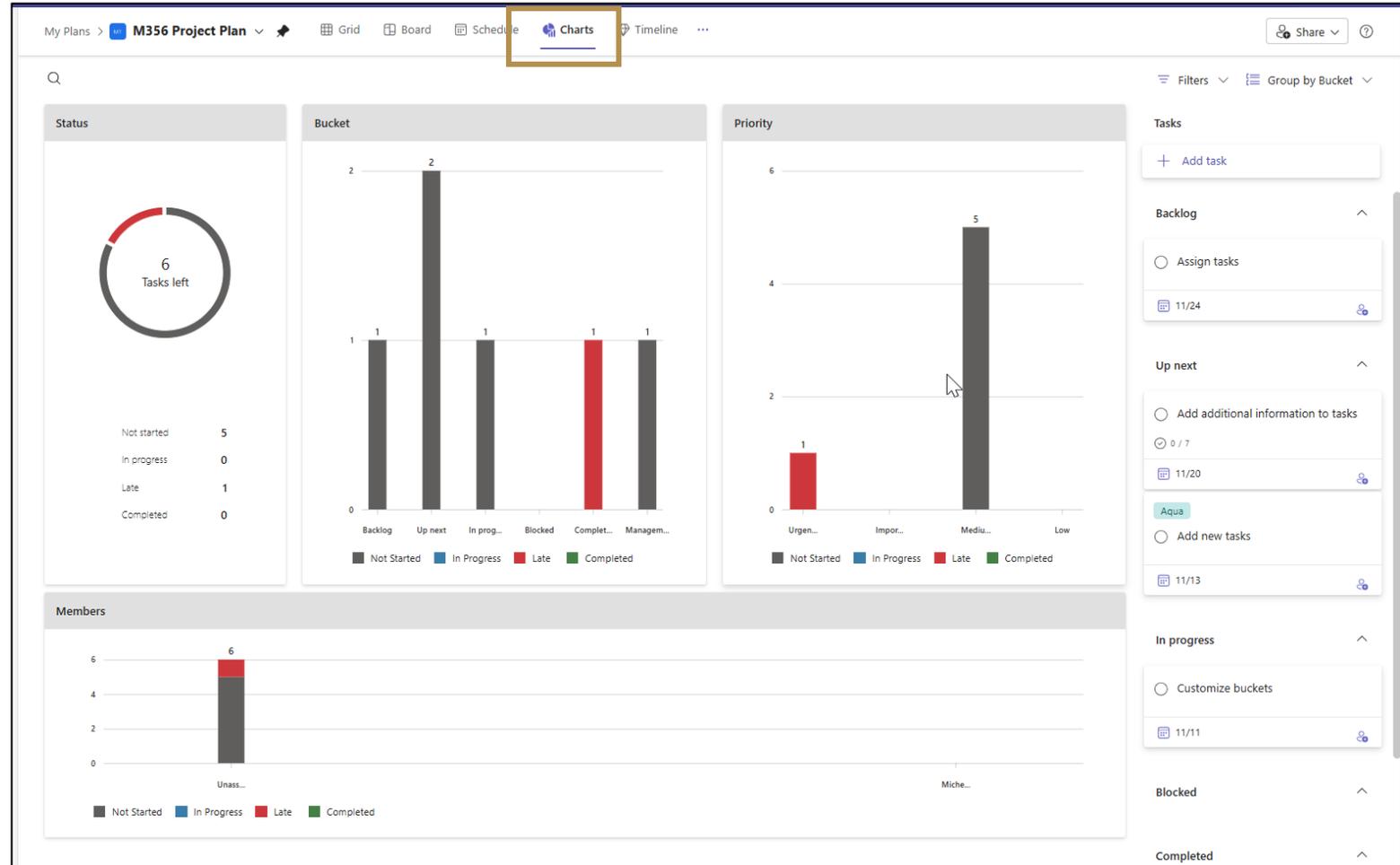


Track Progress

Click the Charts tab at the top to view progress in Planner by Status, Bucket, Priority and Member Assigned tasks.



It is very important for members to update the status of their tasks, for information to be accurate to assess if the plan is on track.



Schedule View

The Schedule view in Planner provides a calendar-based perspective of your tasks, allowing you to visualize deadlines and task distribution over time.

The screenshot shows the Planner interface in 'Schedule' view for 'M356 Project Plan'. The main area is a calendar for November 2025, with days of the week and dates from 26 to 22. A red 'Create a Plan' button is on Wednesday, November 5th. Other buttons include 'Customize buckets' on Tuesday, November 11th, 'Add new tasks' on Thursday, November 13th, and 'Add additional informatio...' on Friday, November 20th. The right sidebar shows task buckets: 'Unscheduled tasks' with an 'Add task' button, 'Backlog', 'Up next', 'In progress', 'Blocked', 'Completed', and 'Management'. A 'Phase 1' button is at the bottom of the sidebar. The top navigation bar includes 'My Plans > M356 Project Plan', view options (Grid, Board, Schedule, Charts, Timeline), and a 'Share' button.

Tasks with assigned due dates are displayed on a calendar.



Quick Recap

- Overview of Microsoft OneNote
- Notetaking Best Practices
- Overview of Microsoft Planner
- Benefits of using Planner for Task Management





QUESTIONS?



THANK YOU