Microsoft 365

OneNote and Planner

Welcome to M365 OneNote and Planner

BE PRESENT
Multi-tasking is a myth

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

CLOSE EMAIL
They'll be there for you later.

TAKE NOTES
Capture important key points as you learn.

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

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

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

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

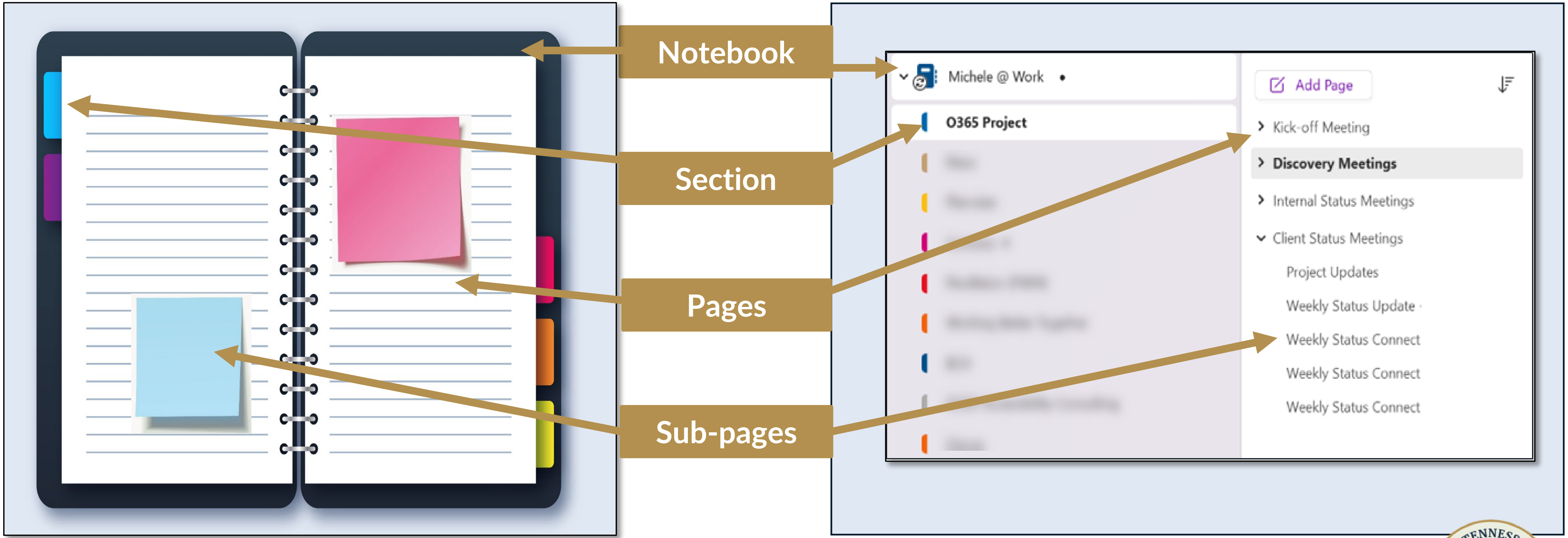
Examples of OneNote Notebooks

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

OneNote Structure

Typical Notebook Structure

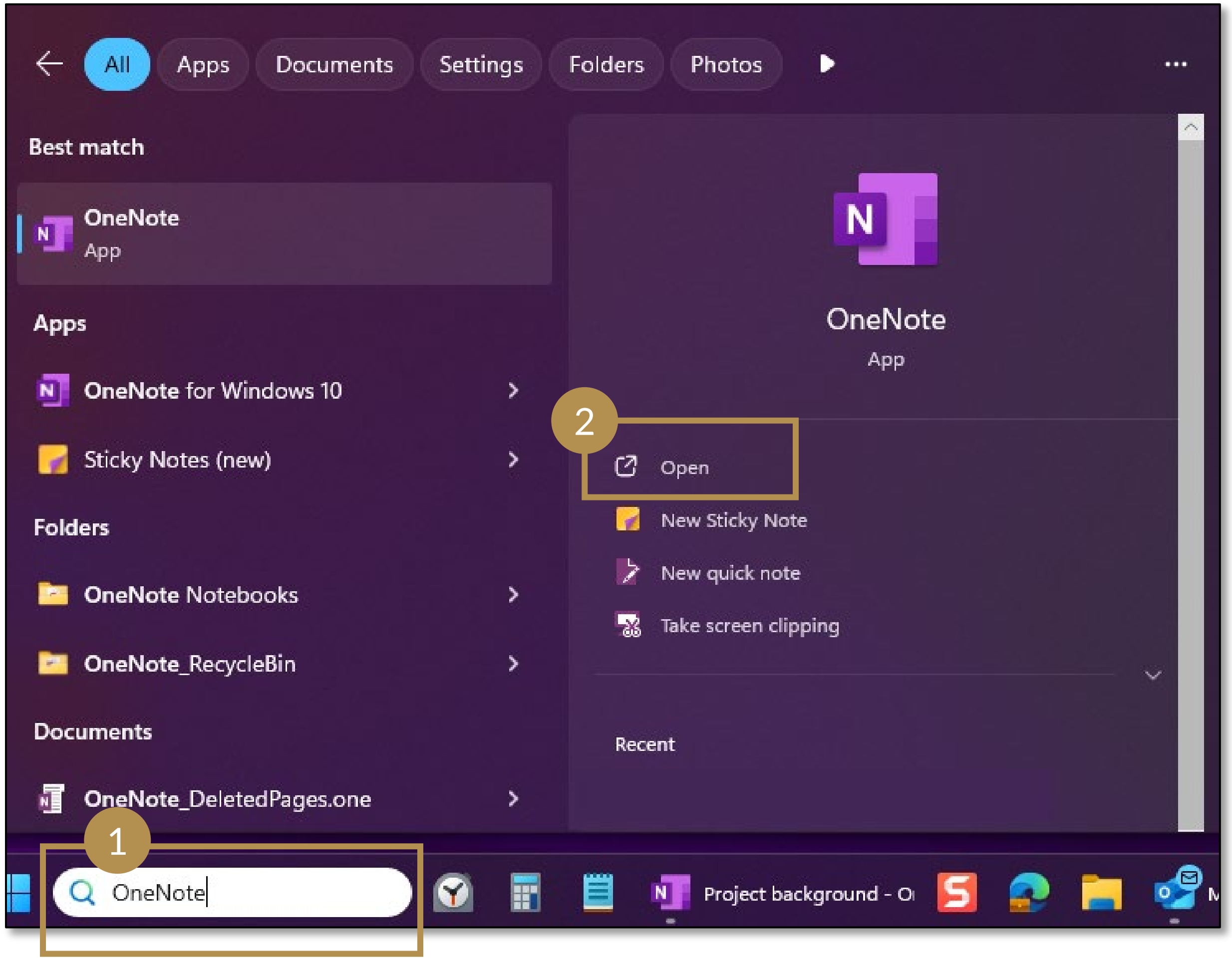
OneNote Notebook Structure



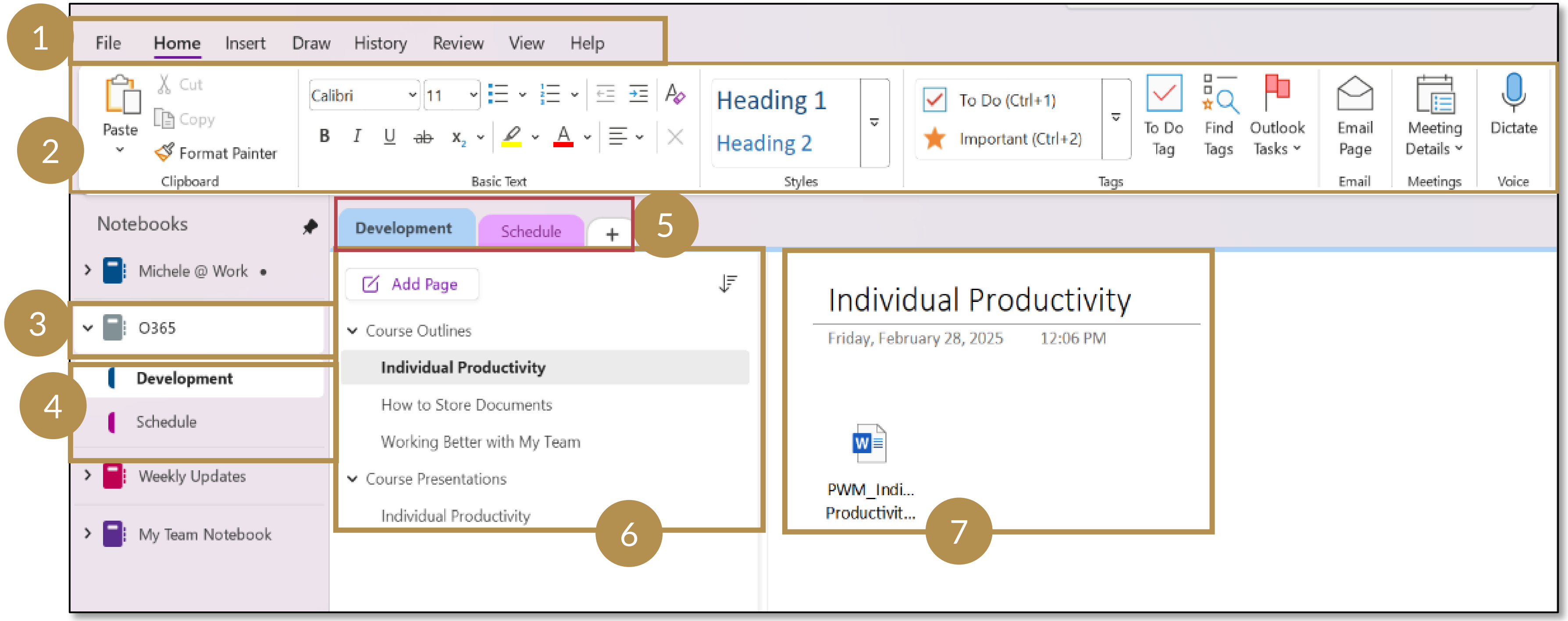
Accessing OneNote

From the Desktop

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

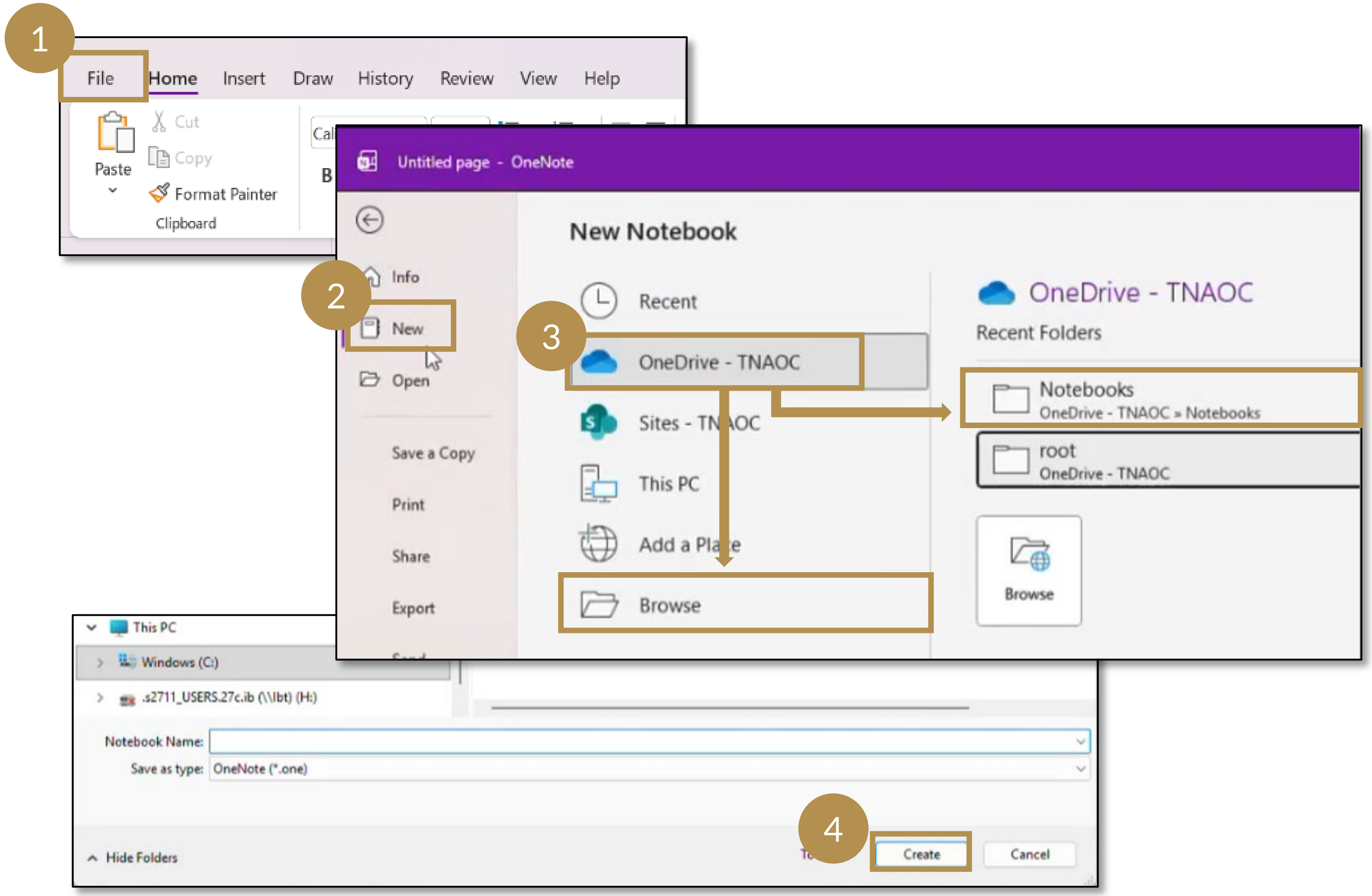


OneNote Navigation



1. Menu Tabs
2. Ribbon
3. Notebook
4. Vertical Section Tabs
5. Horizonal 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**.

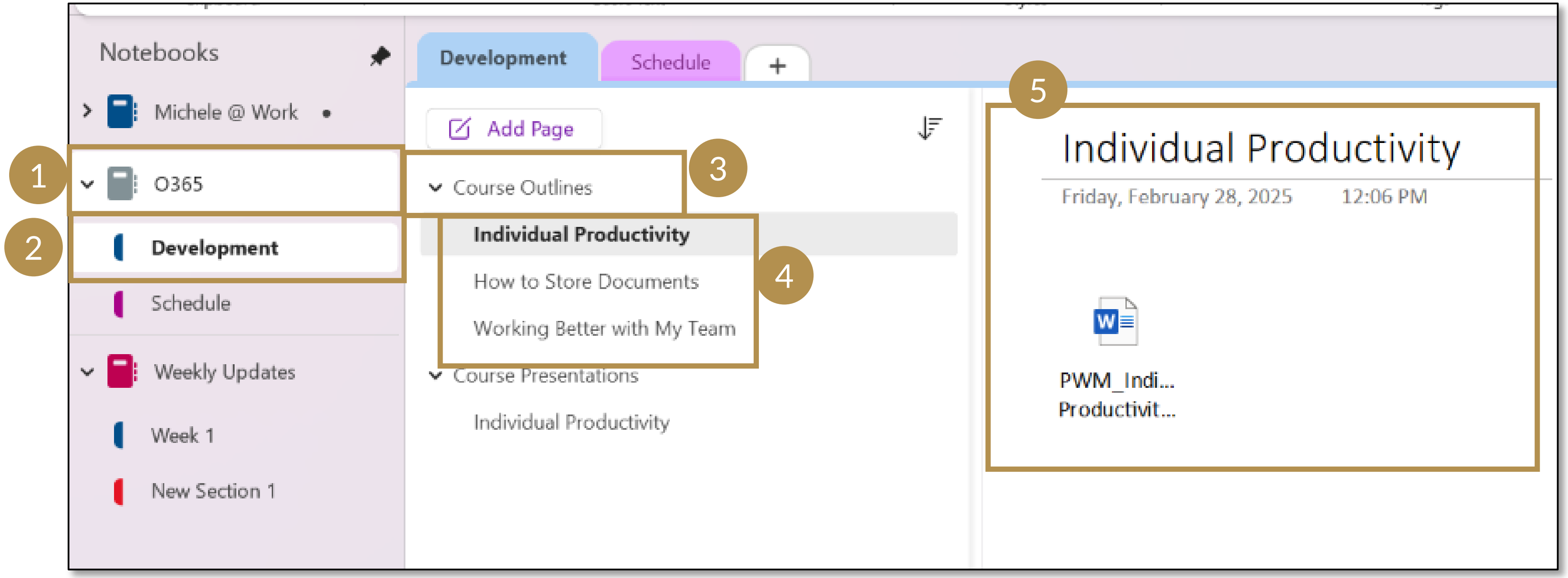
Lesson 1

DEMO - Introduction to OneNote in M365

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

Notebook Structure

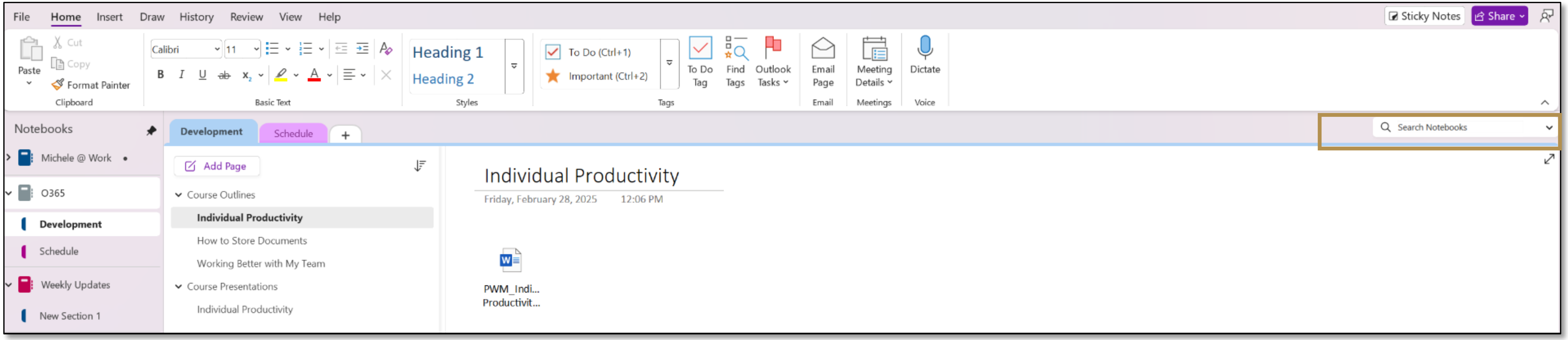
1. Notebook
2. Section
3. Page
4. Sub-pages
5. Note Content



The Ribbon

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

Search


File
Home
Insert
Draw
History
Review
View
Help
Sticky Notes
Share
Paste
Cut
Copy
Format Painter
Clipboard
Calibri
11
Basic Text
Heading 1
Heading 2
Styles
To Do (Ctrl+1)
Important (Ctrl+2)
To Do Tag
Find Tags
Outlook Tasks
Tags
Email Page
Email
Meeting Details
Meetings
Dictate
Voice
Notebooks
Michele @ Work
O365
Development
Schedule
Weekly Updates
New Section 1
Development
Schedule
Search Notebooks
Add Page
Course Outlines
Individual Productivity
How to Store Documents
Working Better with My Team
Course Presentations
Individual Productivity
Individual Productivity
Friday, February 28, 2025
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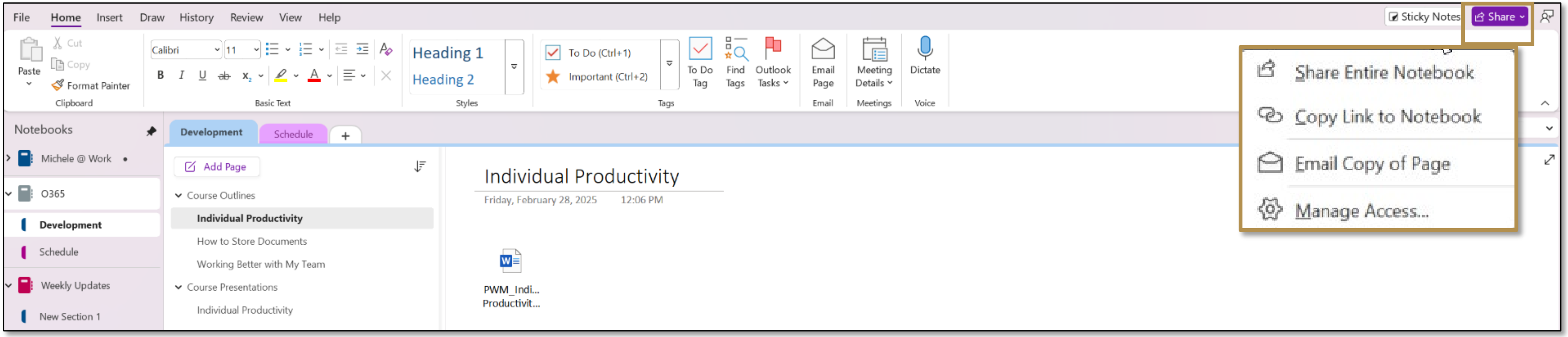
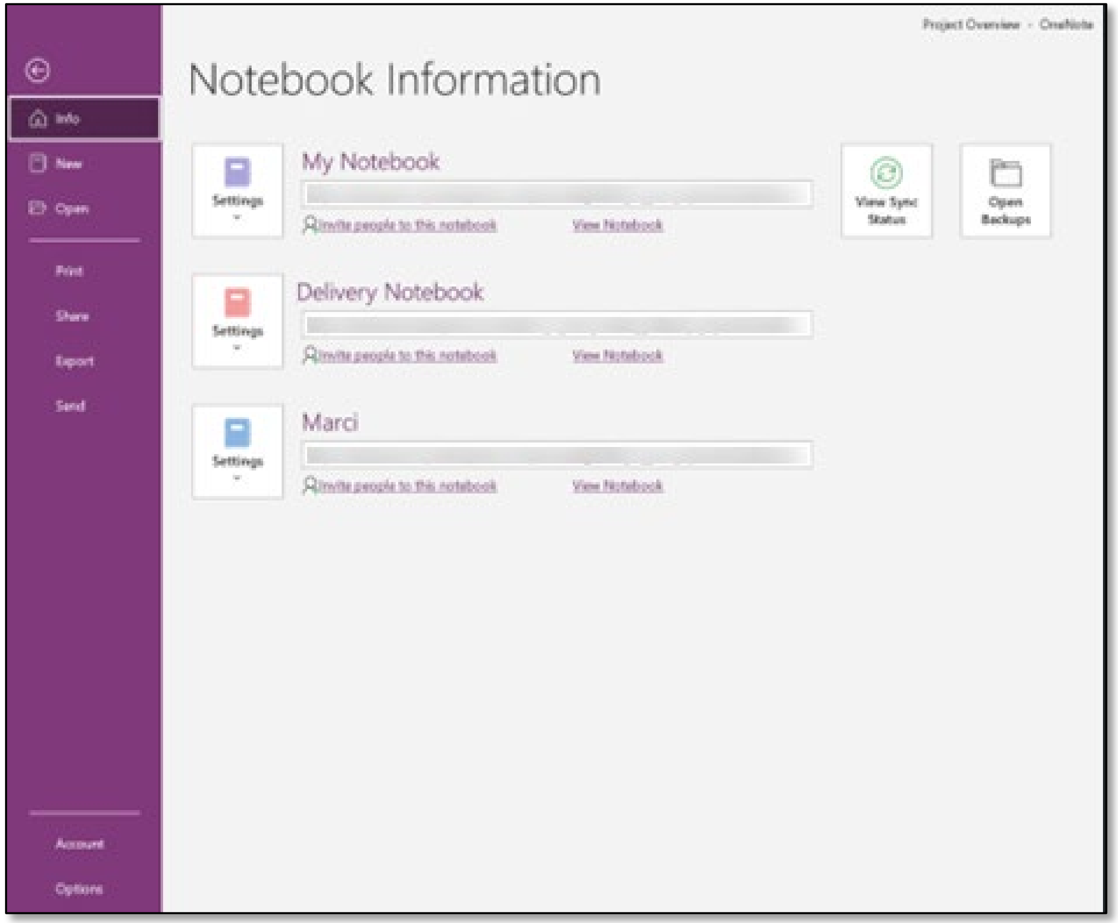
Share

OneNote offers multiple ways to share your notebook.

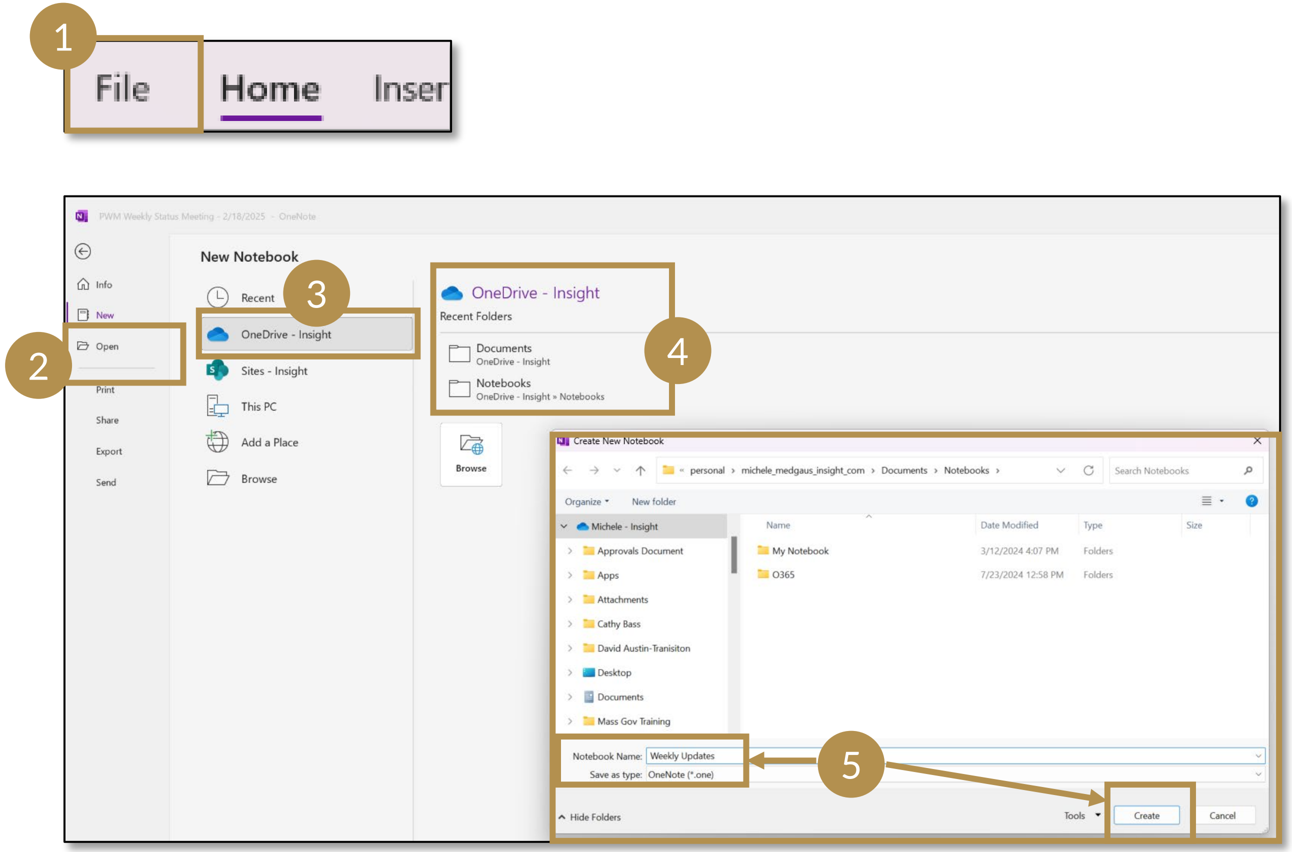


File Tab



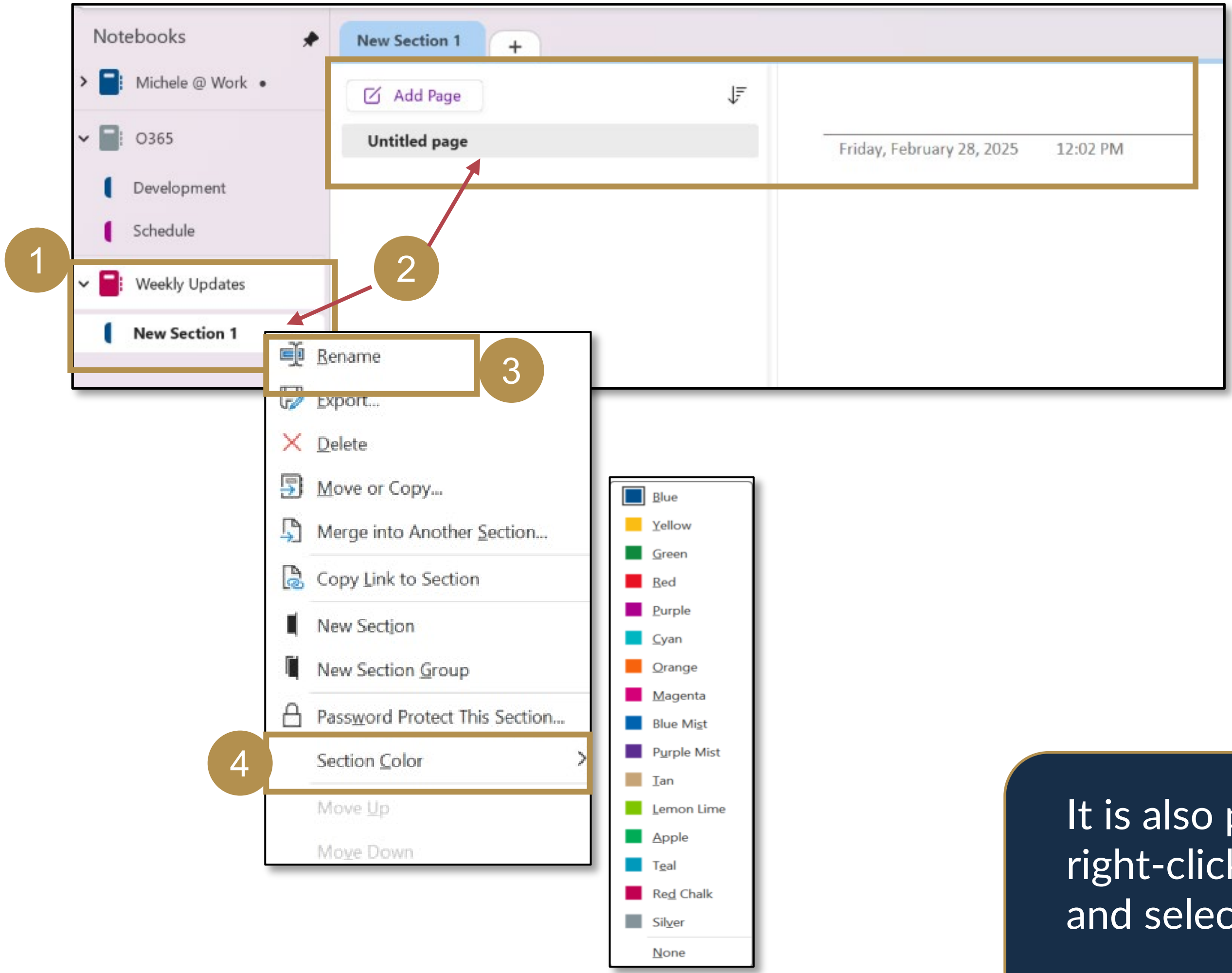
Click the **File** tab to open other notebooks, export, share, export and much more.

Create a Notebook

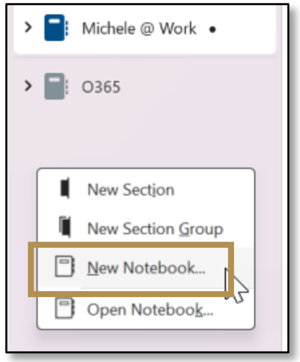


1. Click on the **File** tab.
2. Select **New** to display the New Notebook options.
3. Choose **OneDrive**.
4. Follow the prompts for the location you chose.
5. Name the new notebook and click **Create**.

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.

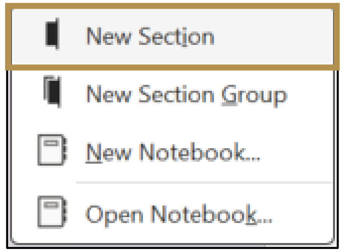
OR

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

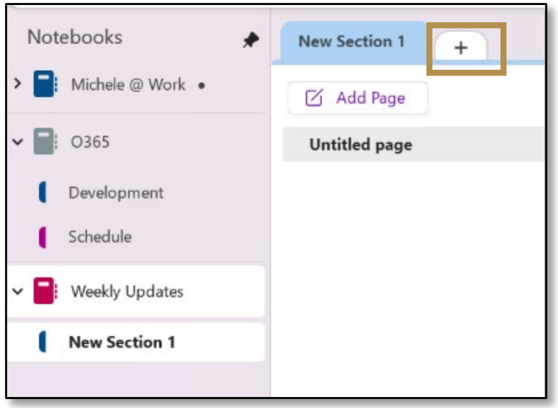
A new section tab displays with the placeholder's name New Section.

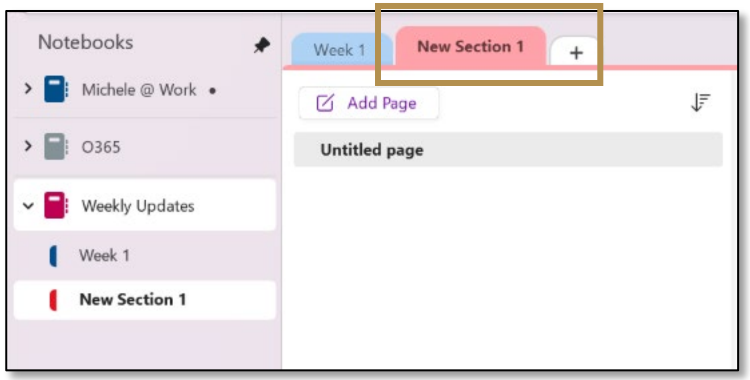
You name the new section by right-clicking the new section and selecting Rename.

1



2

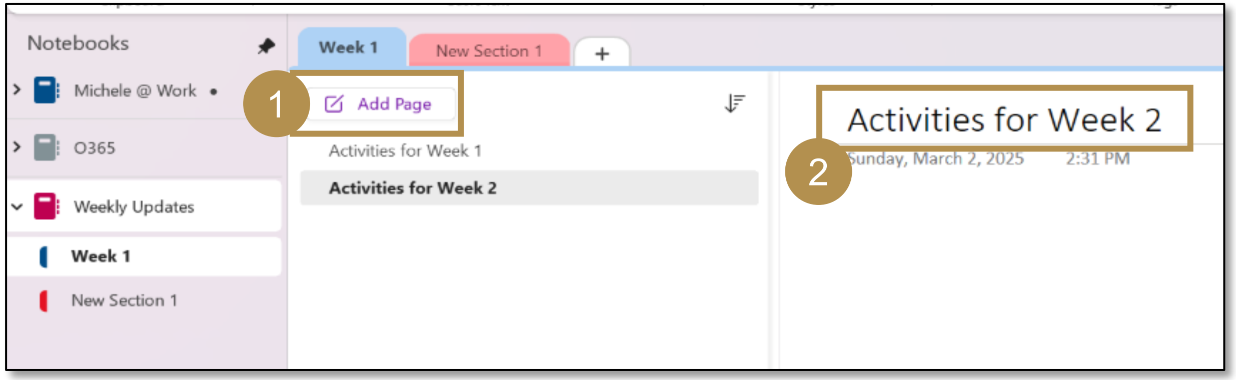




Add Pages to a Section of a Notebook

To add a page to any section

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



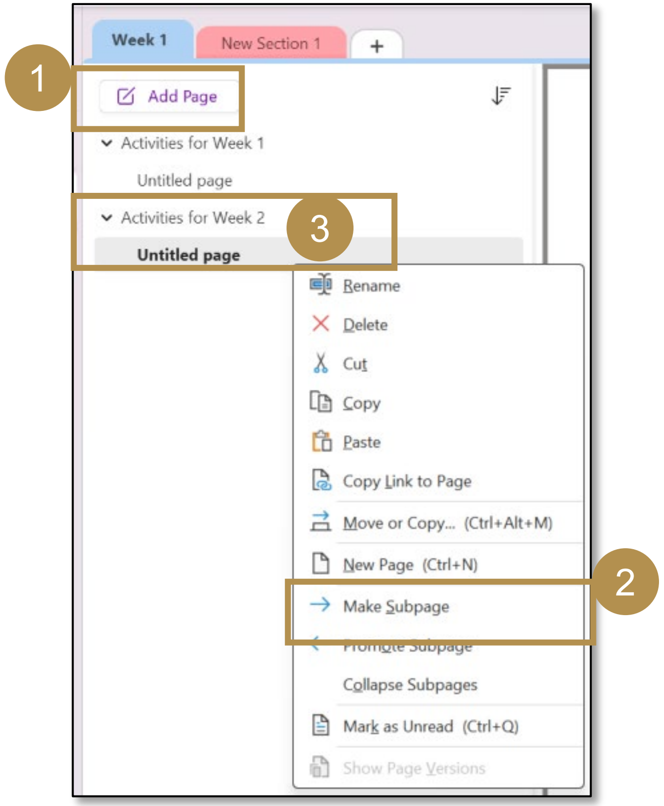
- Once you add the page, the untitled page shows up in the Pages list and the cursor is automatically at the top of the page in the main panel.
- As you start typing the name, the title shows up in the main panel.

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.

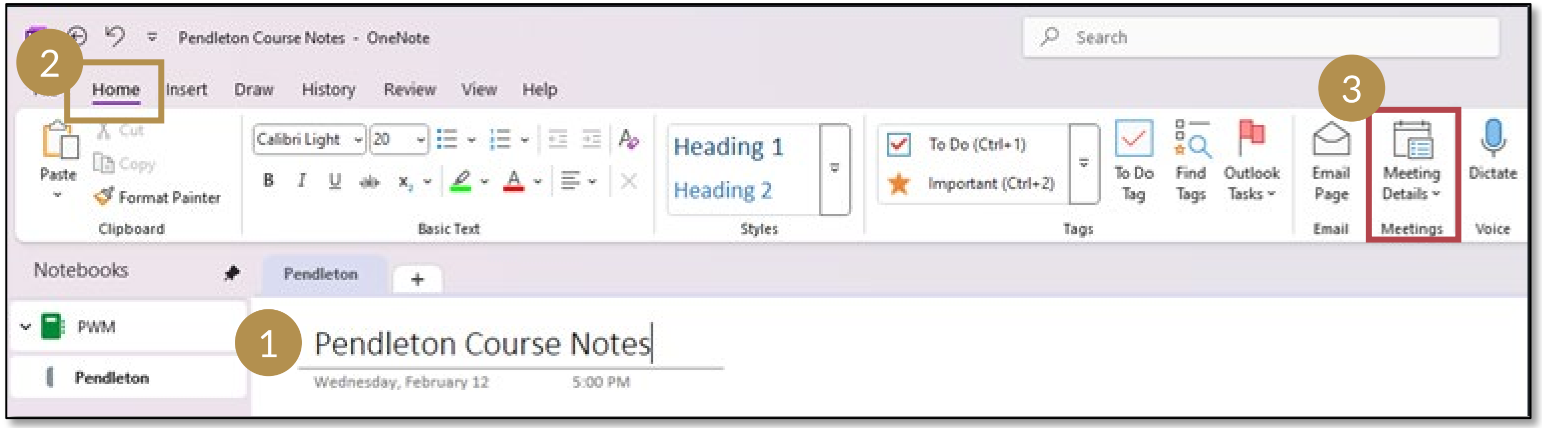
Add Meeting Details

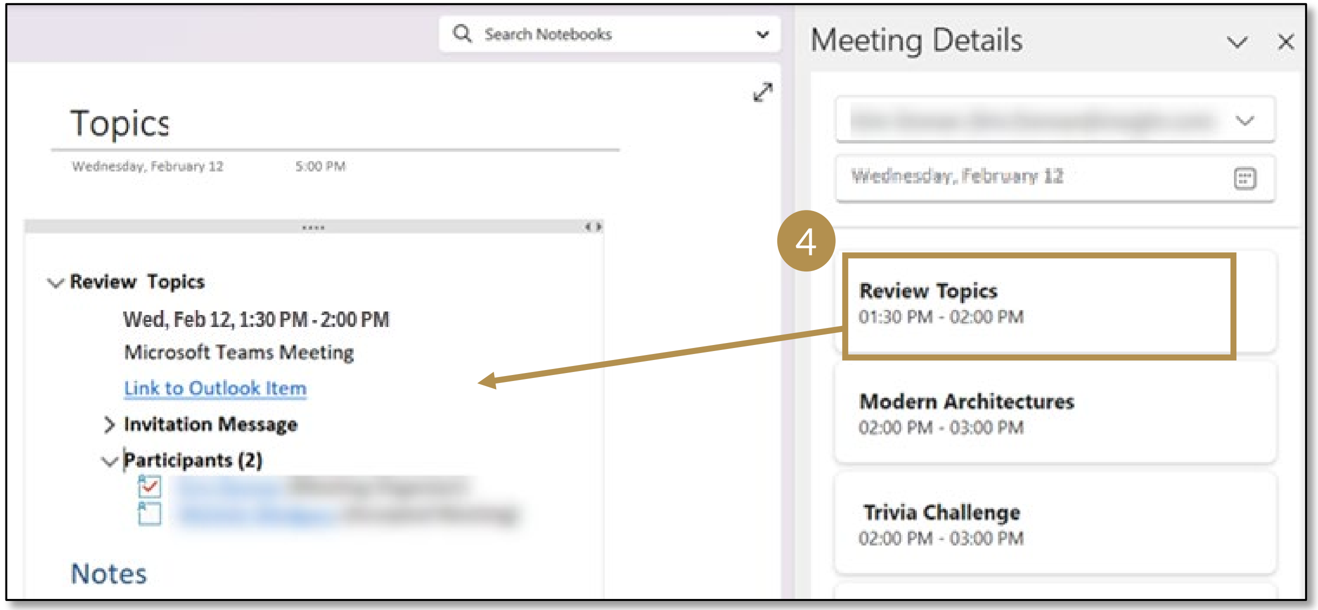
To search a notebook:

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

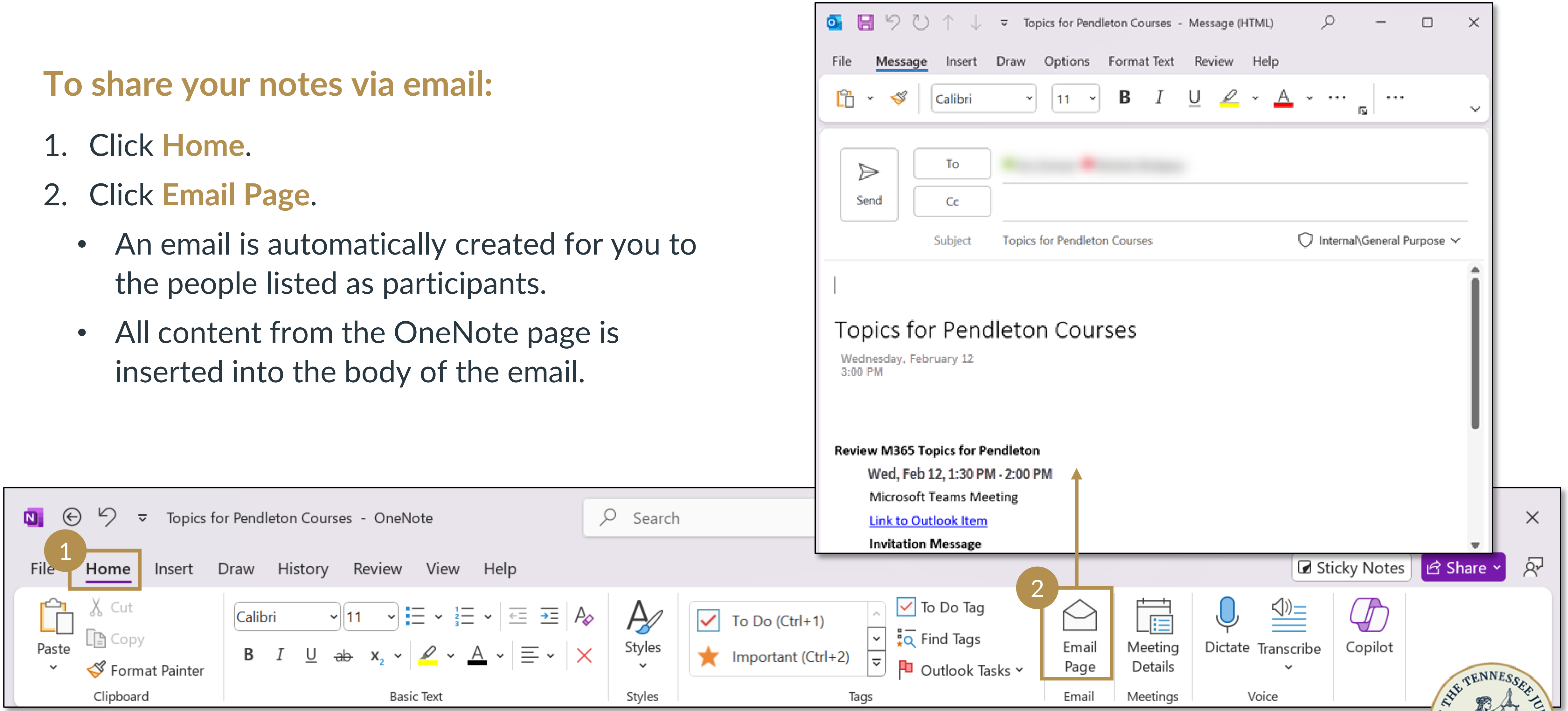




Share Meeting Notes Via Email

To share your notes via email:

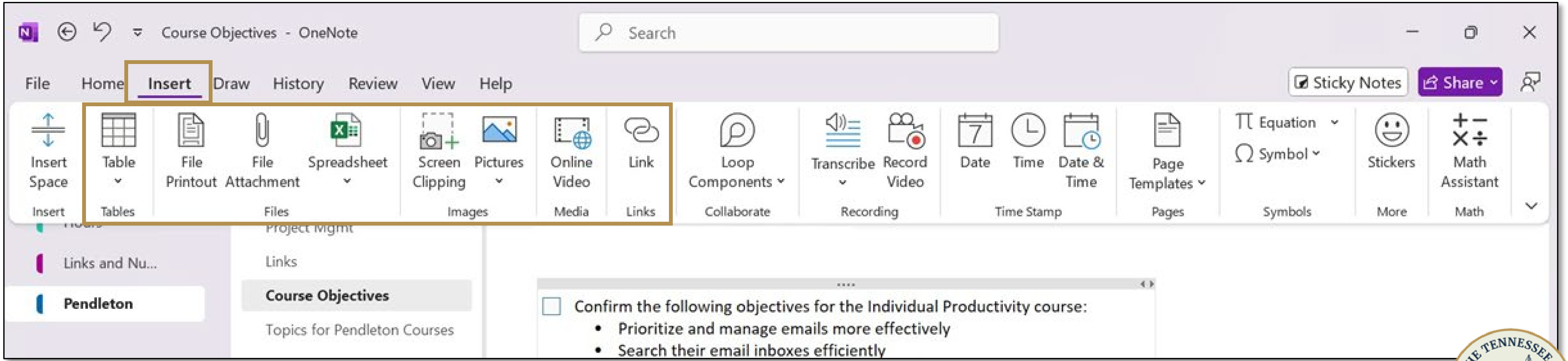
1. Click **Home**.
2. Click **Email Page**.
   - An email is automatically created for you to the people listed as participants.
   - All content from the OneNote page is inserted into the body of the email.



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

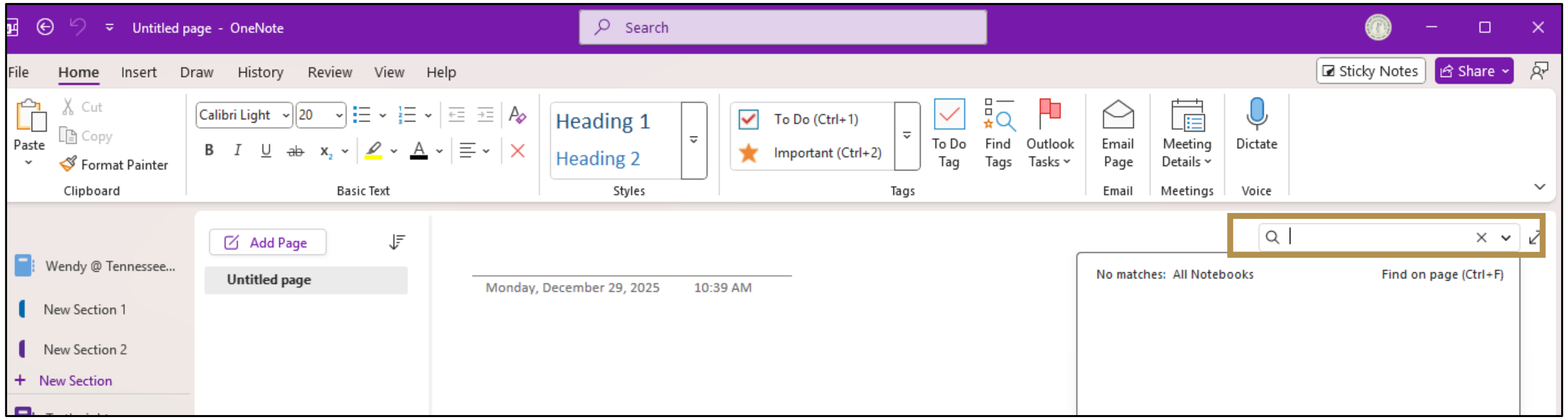
DEMO - Notetaking Best Practices

- 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.

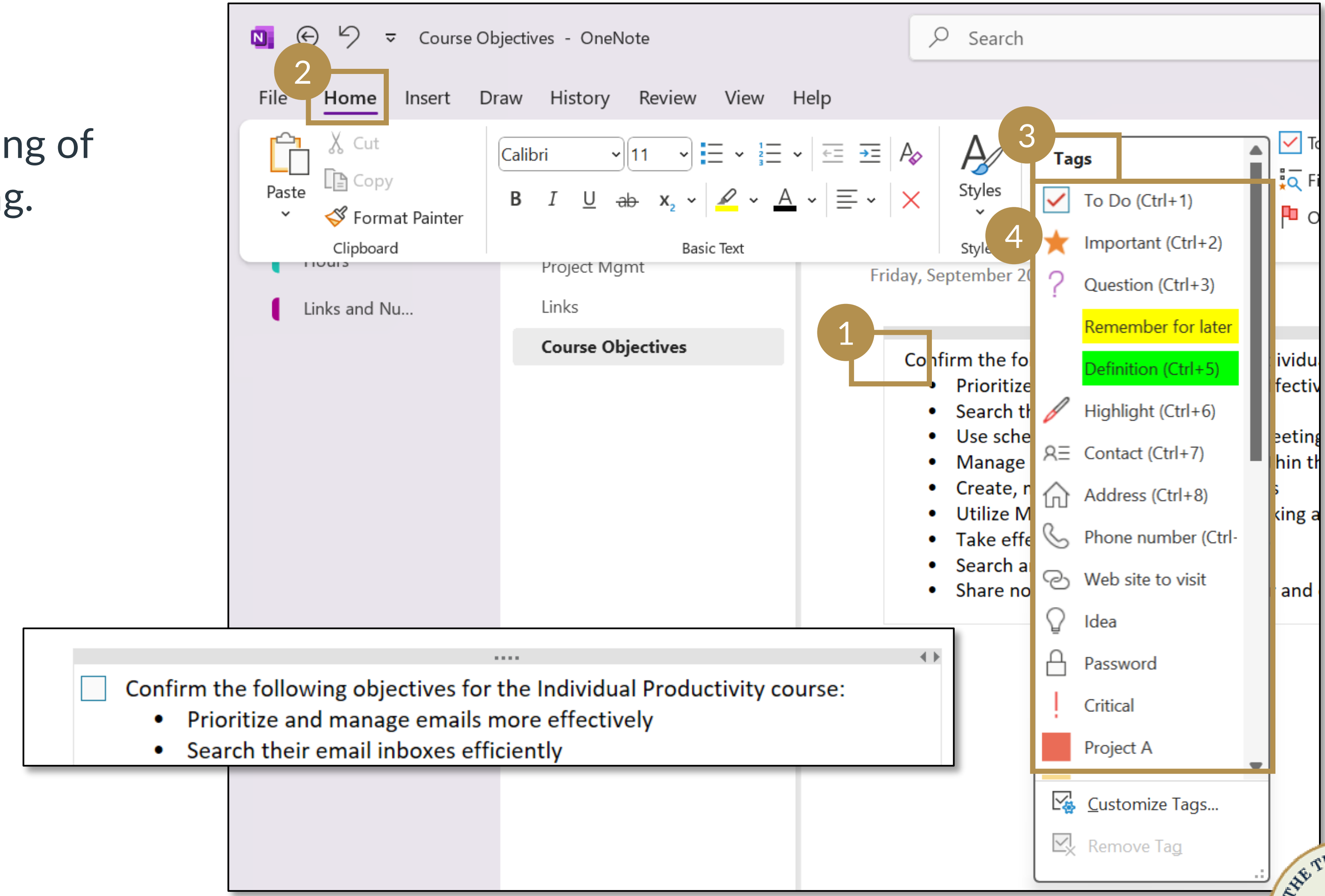


OneNote can also search for text in a PDF file or a graphic file.

Add Tags

To add a tag:

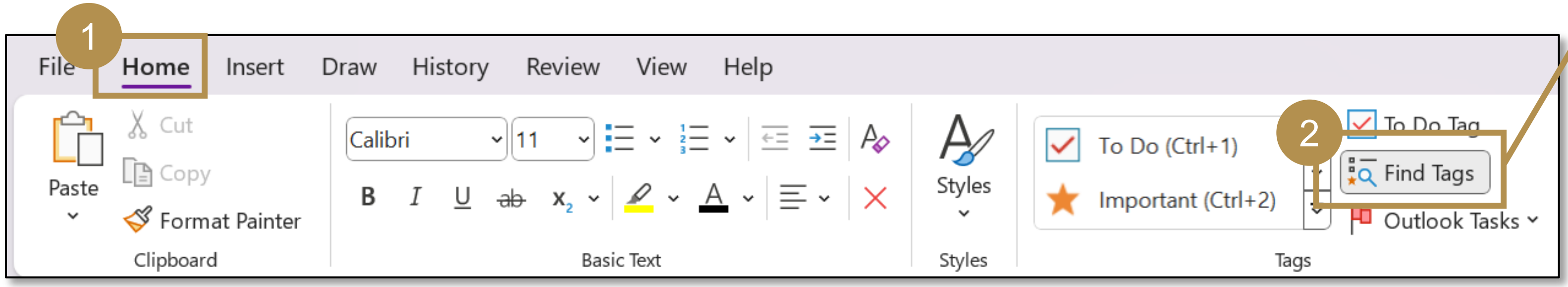
1. Put your cursor at the beginning of the line of text you want to tag.
2. Click **Home**.
3. Click the **Tags** drop-down.
4. Select the appropriate tag.

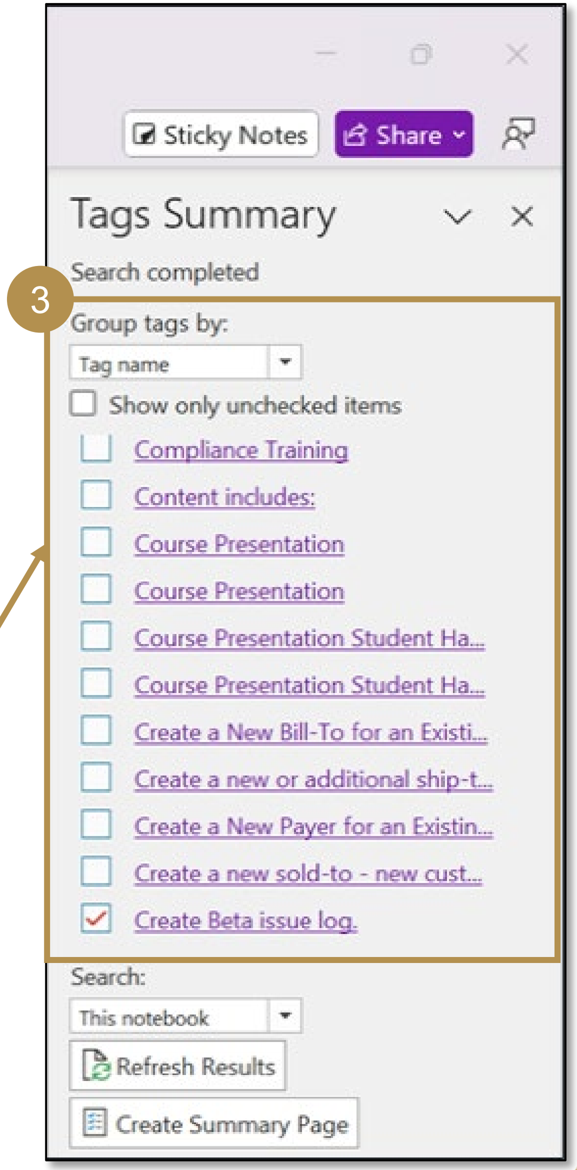


Search a Notebook for Tags

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.

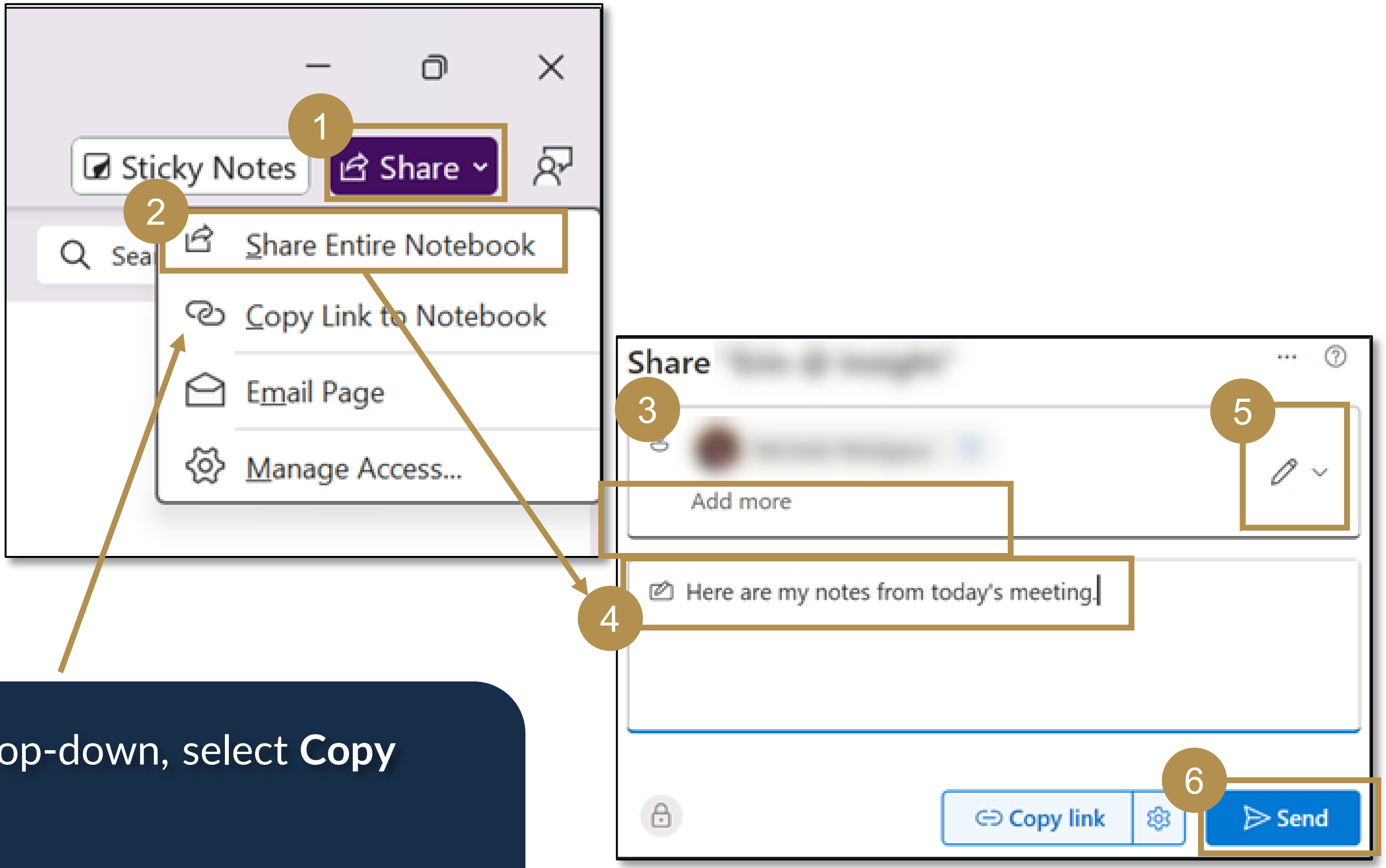




Share a OneNote Notebook

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

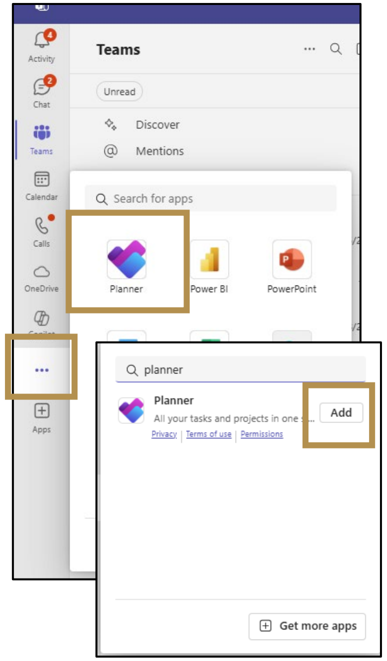
- Create a plan
- Invite your team
- Assign project tasks
- Drag and drop tasks
- Attach files

How to Access Planner

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

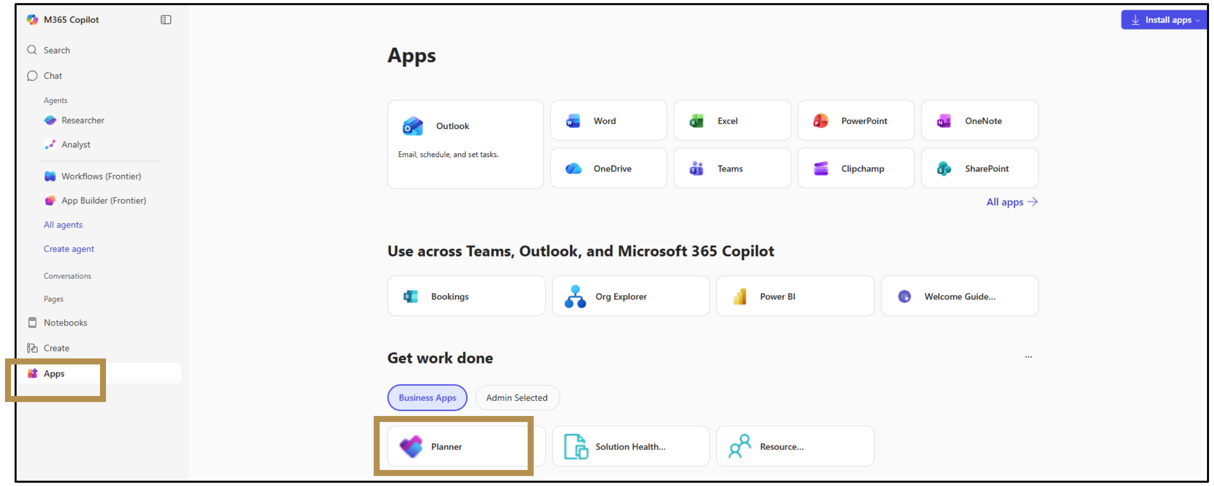
From Teams:

- 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

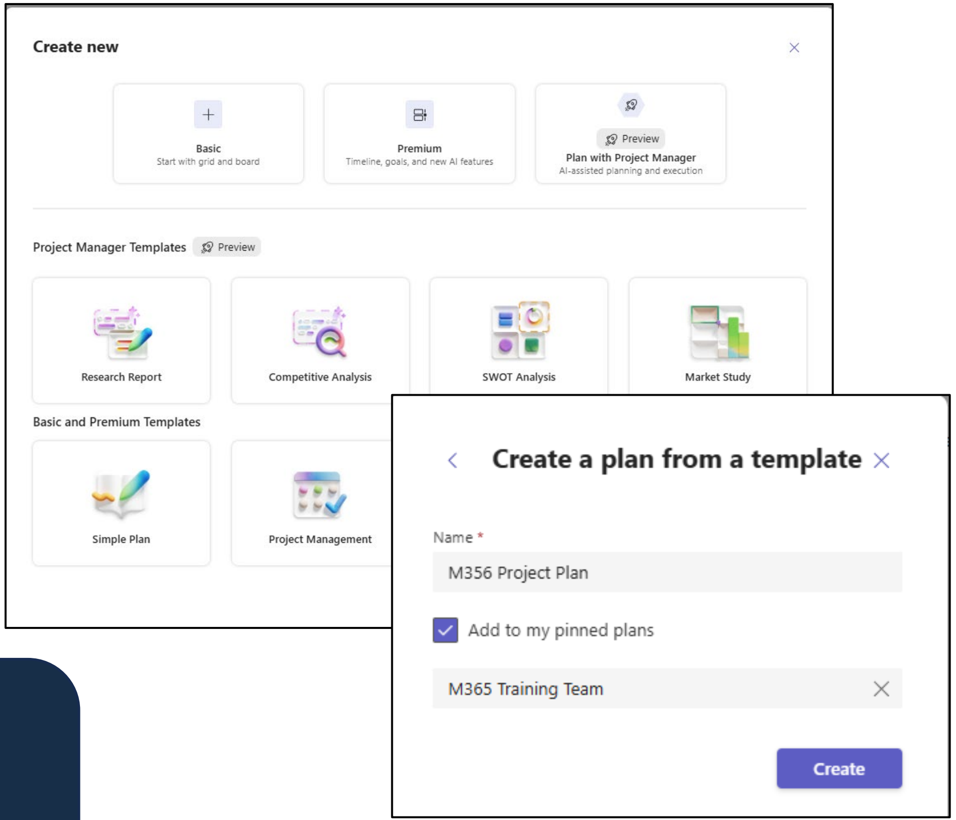
Create a Plan

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

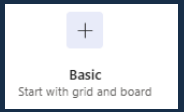
1. Select the **Planner** app.
2. Click **+ New Plan**. 

3. Select a template and click **Use Template.** 

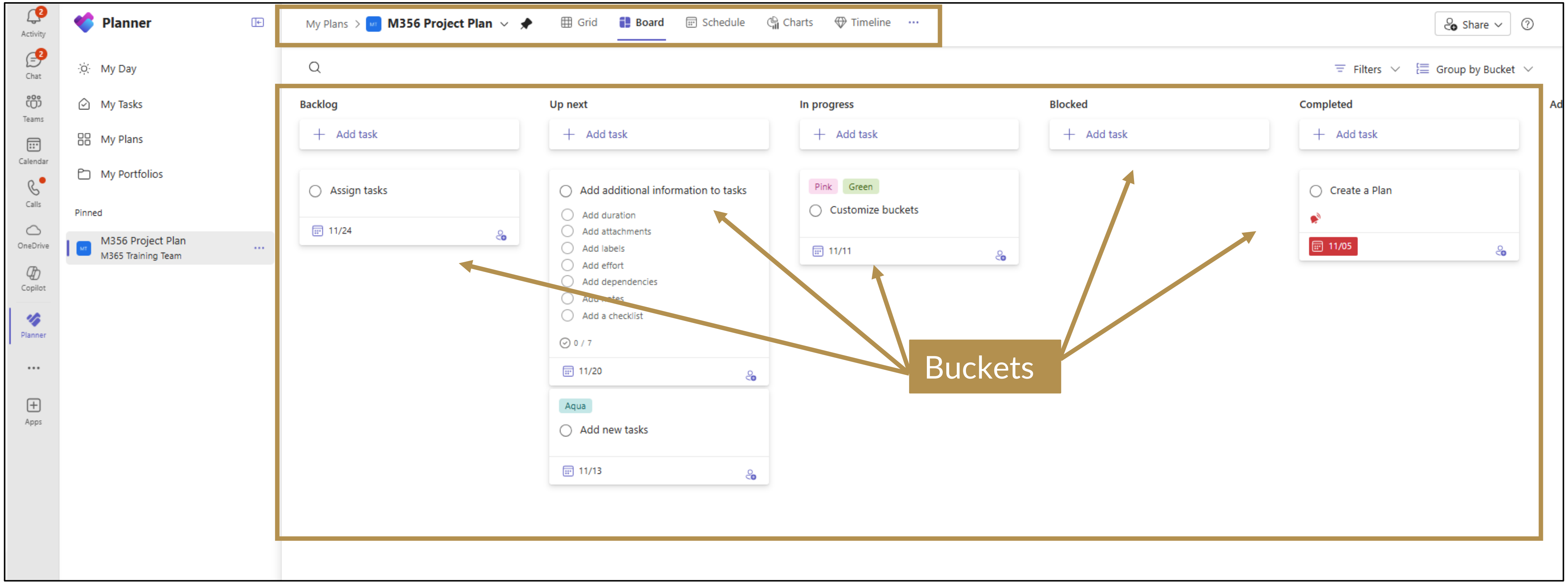
4. Enter a name for the plan and add to an existing channel.
5. Click **Create**.



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 exiting plan from this team** and selecting a plan from the dropdown.



Planner Overview Screen

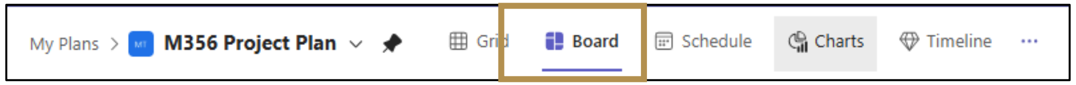


- **Grid** – List of Tasks
- **Board** – create buckets or groups of tasks, for example, Phase 1, Phase 2
- **Schedule** – calendar of tasks
- **Charts** – displays the progress of tasks in different types of graphs

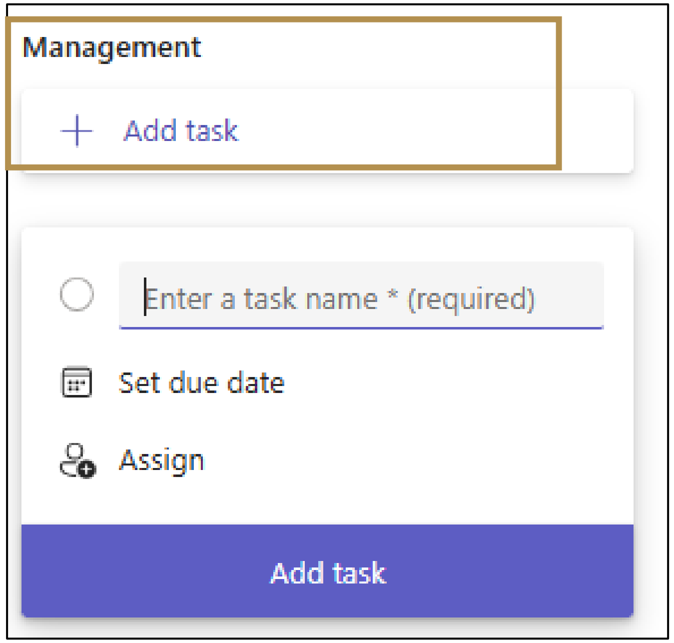
Create and Edit Buckets

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.

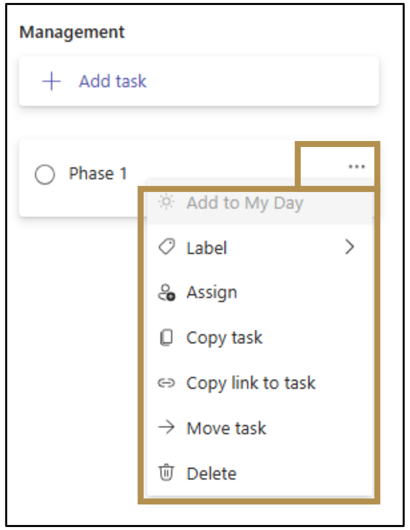


- Select **Board**.
- Scroll far-right, click **Add a new Bucket**.
- Enter a name for the bucket.
- Buckets are ready for you to add tasks
- Click **+ Add task**.
  - Enter the task details.
  - Select a due date.
  - Assign to staff.
  - Click **Add task**.

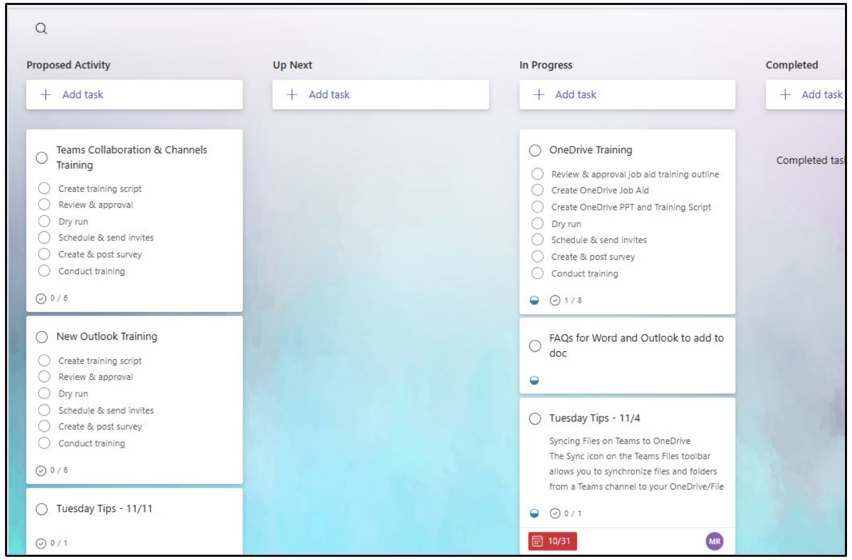


Organize Tasks

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.

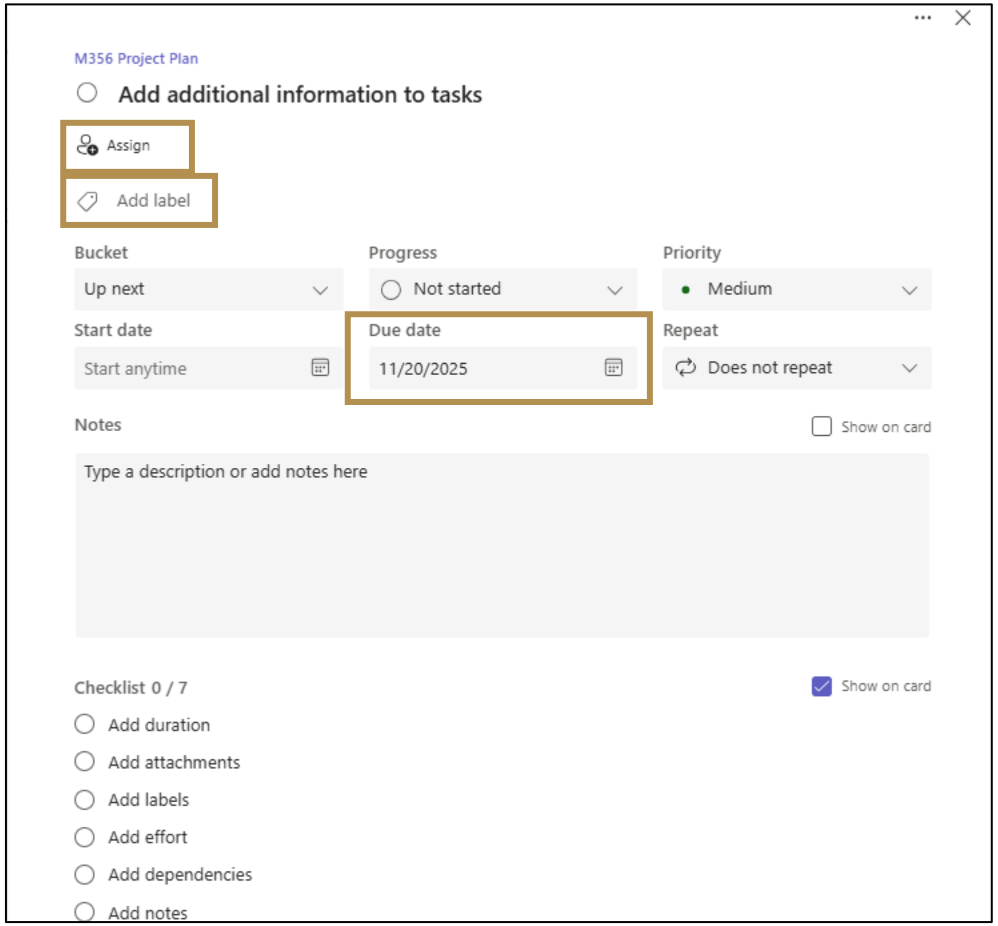


Add Additional Information to Tasks

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

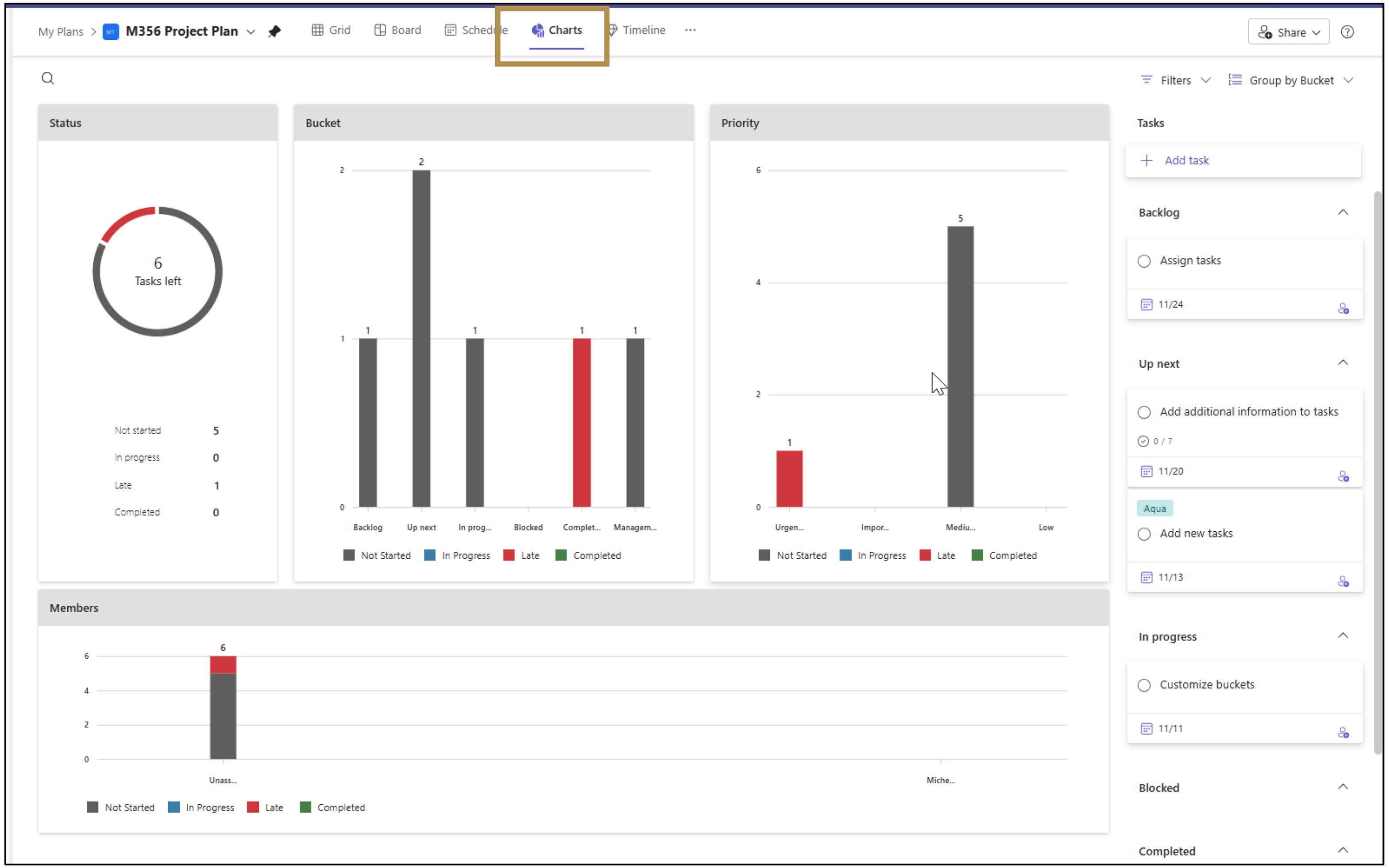
The task details pane opens.

- 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.



Track Progress

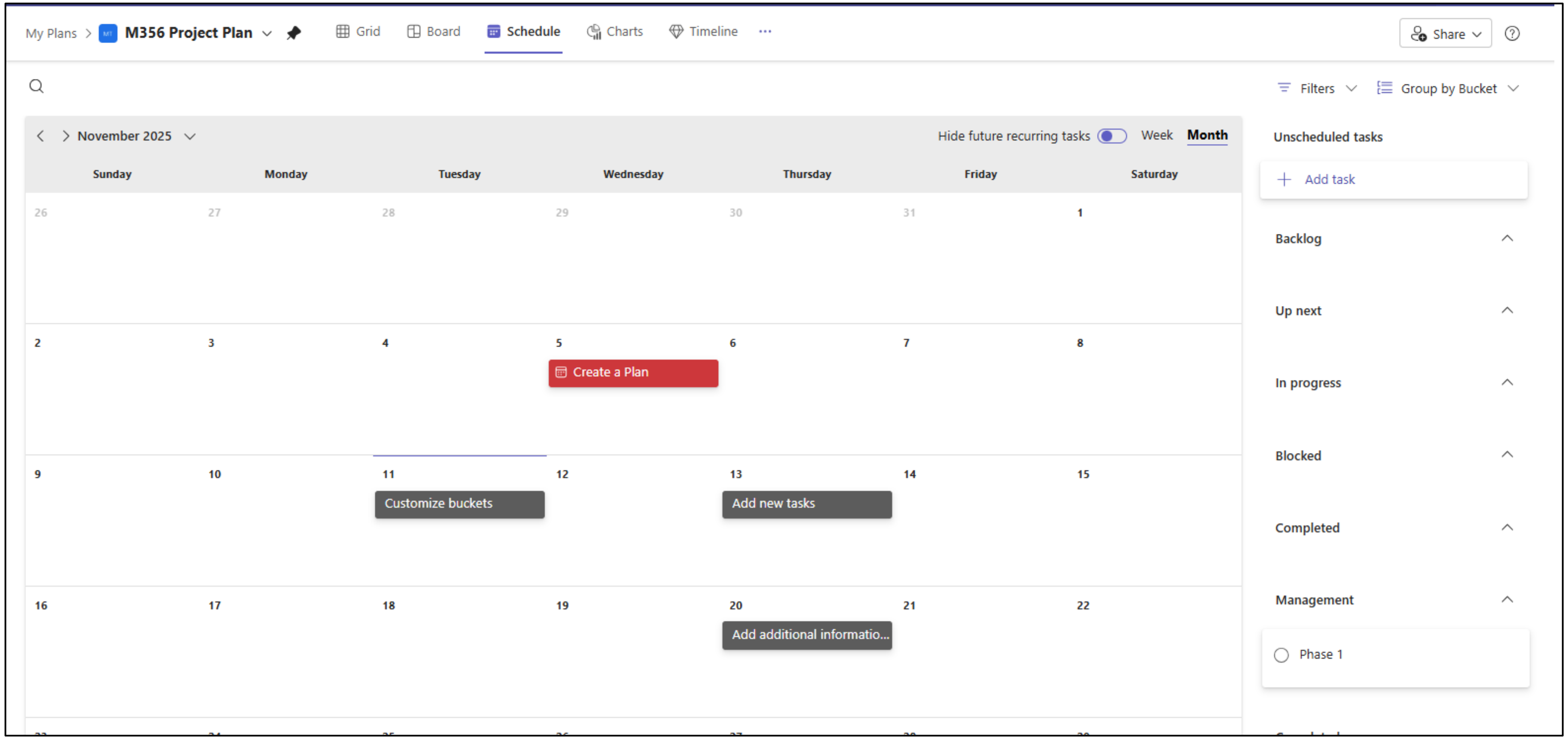
Click the Charts tab at the top to view progress in Planner by Status, Bucket, Priority and Member Assigned tasks.



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.



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 sing Planner for Task Management

QUESTIONS?

THANK YOU