

Setting up Projects in OneNote - The basics

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Based on the number of interviewers on my podcast that considers OneNote one of their go-to tools, and comments in various PM-focused Facebook groups, I believe there is an interest in using and optimizing OneNote to help manage projects. With this knowledge, I decided to put together a quick, basic guide to get those new to OneNote started. Please keep in mind that I am not a OneNote expert and I put this together in a couple of hours, so there are gaps and areas for improvement. Feel free to email me any areas you would like to see more screenshots, details on or even ideas or lessons learned of your own.

OneNote comes free with Windows but is also an application in Office 365 and is available as a web version, a Mac version and as apps for your mobile devices, so it can be accessed nearly anywhere. I do not know every limit, because I primarily use the Office 365 App version on my laptop for work. For home and side hustles, I use OneNote for Windows 10 on my personal Laptop and personal iPhone and iPad. Note that this writeup is based on using the OneNote desktop app that comes with office 365, not the Windows 10 version. To learn more about the difference between the two versions see the resource section at the bottom of this post for links where you can dive into more details.

OneNote is divided into multiple sections.

The simplest separations are:

- Notebooks
- Sections (tabs)
- Pages

Notebooks:

- Can be Named
- Can be one of 16 different colors
- Can be Linked to
- Can be Password Protected

Sections (Tabs):

- Tab Color can be one of 16 different colors
- Can be Named (50 Characters)
- Can be Linked to
- Can be Password Protected

Pages:

- Can be Named
- Can be Shared and Linked to
- Can be Indented to provide an organized structure

Security:

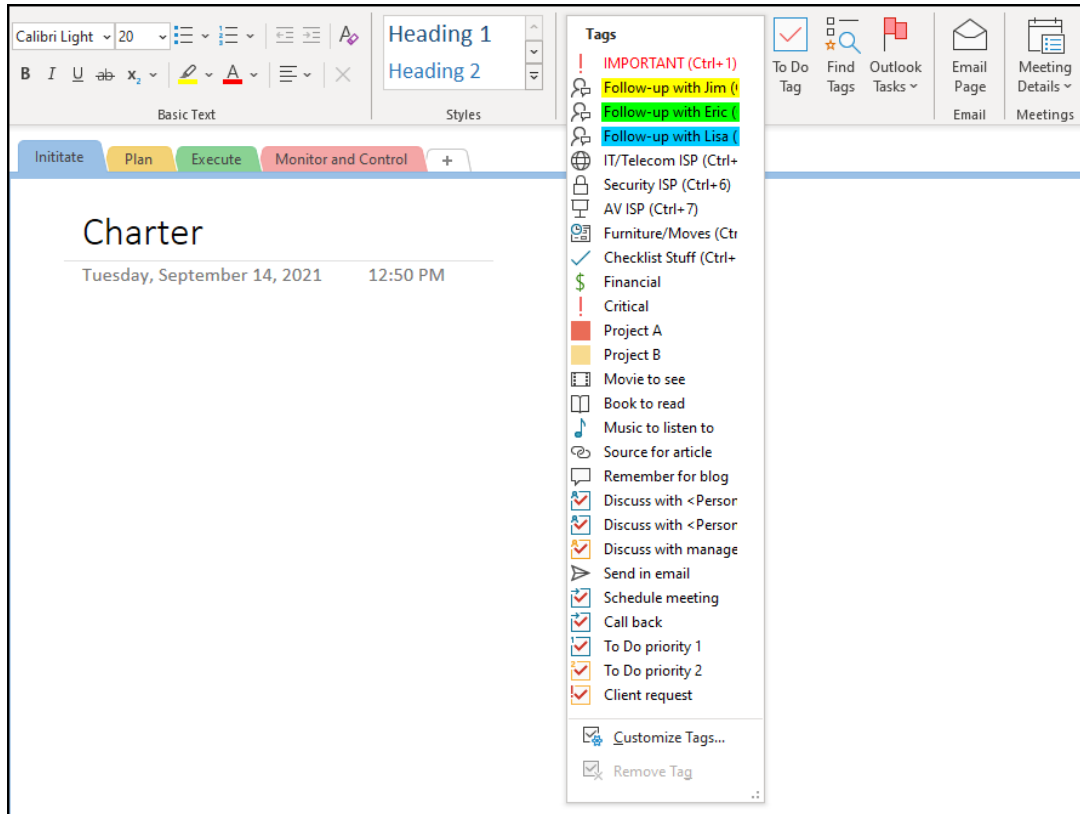
If you need to share with others, there are a few options and considerations to think through before setting up your project.

Notebooks are the highest level of sharing and is great for teams and collaboration. Note that you can share a notebook, and then add passwords to sub-sections (tabs) to give a higher level of control. i.e. Let's say you share a project notebook, but during the project you want to save notes and reviews of how the team did on this particular project and also have an area to save project-related passwords. You could create a tab called "Private" and set a password that only

you and maybe your manager knew – although the team could access the project notebook, they could not get into the “Private” section.

Cool Formatting options:

- Standard items like bullets, lists, tables, font formatting, etc.
- Cool options include Checkboxes, Tags, Outlook linking for tasks.
 - Note That the OneNote for Windows 10 version has fewer of these options available.



Project Set up:

There are multiple ways to set up a project in OneNote, it really depends on you or your company’s way to manage projects.

Things to consider:

- Is this for your use only, or will it be shared or partially shared with others? i.e will the info need to be shared for read-only or with edit rights?
- Could the project you manage get transferred to another PM during the project?
- For maximum flexibility, keep your Notebooks on OneDrive.

Two project setup options:

#1 - By the Book:

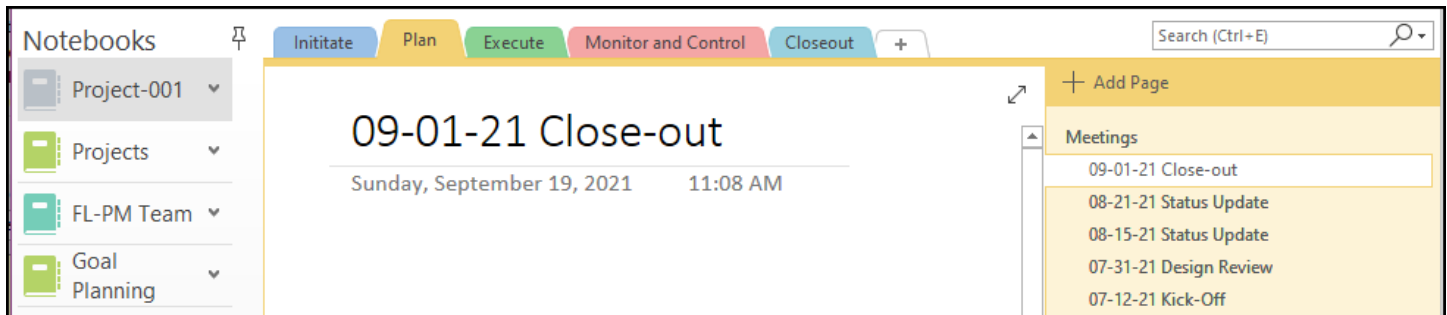
Set up each project in its own OneNote notebook. Name your notebook based on the project name or number. Numbers allow more flexibility, especially if your project names are very similar.

- Pros:
 - Easy to share and secure. Only give access to those you want to have access.
 - Archive the entire book with your closeout documents.

- Easily hand everything over to another PM in a project transfer.
- Cons:
 - You could end up with a very long list of books if you manage a lot of projects.
 - Requires an Office 365 account
 - Storage space?

Options for Notebook setup:

- Name your tabs based on major phases, like Initiate, Plan, Execute, Close, etc.
OR
- Name your tabs based on your own major thoughts on project organization, like Scope, Financials, Meetings, Reports, Documents, etc.
- Within each tab, you create pages that can include text boxes, tables, images, checklists, document attachments or links, etc.
- Pages can be grouped by adding a page that is used as a heading, like “Status Updates”. Below that, add a new page that you indent, which becomes your first “Status Update”. I would recommend naming with the date of the update and always place your latest on the top.



#2 - By Topic:

Set up Notebooks for various responsibilities with a Notebook called “Projects”. Within the Projects notebook, you can label the sections (tabs) by Project Name and then name the pages and sub-pages based on the tasks, sections, or items you track for each project. This would be good for small projects or as a supplement to an existing Project Management software application that does not have everything you wish to track.

- Pros:
 - Easy to share and secure. Share the overall “Projects” notebook, but password protect each section (Project) as need.
 - OneNote book to work in.
- Cons:
 - If you manage a lot of small projects, your sections can get overwhelming. Note that you can create an “Archive” section or a “Year” section to move the tabs in to reduce the visual clutter of so many tabs.
 - I think this limits organizational flexibility.

Shortcut Keys:

A hand full of commonly used shortcuts in OneNote – Note that most of these are those found in all typical Microsoft standard applications, so feel free to try other that you use in Word, Excel, and PowerPoint – like text formatting shortcuts, Ctrl-B, Ctrl-U, etc.

- Ctrl-1, Ctrl-2, Ctrl-3, through Ctrl-9 = Customizable tag inserts. Example: I use Ctrl-1 to tag an item as Important and Ctrl-2 as a Tag to follow up with my manager. You can do a search for “All Tagged” items to see what you tagged.

- Ctrl-C = Copy

- Ctrl-F = Find (Super powerful)
- Ctrl-V = Paste
- Ctrl-X = Cut
- Etc...

Resources:

Below are some links to videos that I have watched in the past on using OneNote. Each one has a different level of detail and is geared to words different levels of experience. Do not watch just one, as you will find you get something different from each one. The YouTube one about "Getting Started..." is the most comprehensive and if you are going to choose just one – watch that one.

- Versions:
 - What's the difference between the OneNote versions?
 - <https://support.microsoft.com/en-us/office/what-s-the-difference-between-the-onenote-versions-a624e692-b78b-4c09-b07f-46181958118f>
 - Differences between OneNote and OneNote for Windows 10.
 - <https://www.onmsft.com/feature/onenote-vs-onenote-for-windows-10-whats-the-difference>
- How to YouTube:
 - How Project Managers can Use Microsoft OneNote
 - <https://www.youtube.com/watch?v=Q95hyhlfZJg>
 - Getting Started with Microsoft OneNote (3.5+ hour video)
 - <https://www.youtube.com/watch?v=k9elwXXJyss&t=698s>
 - Project Manager's Guide to OneNote
 - <https://www.youtube.com/watch?v=N6mk66KNEdg>
- Other Learning Resources – Join and do a search for OneNote:
 - Udemy
 - LinkedIn

Future additions:

- Grouping tabs
- Archiving
- Templates
- What are you interested in learning more about?

WES

Walt Sparling is a certified Project Management Professional (PMP) and currently, works full time as a Project Management Team Lead, managing a team of project managers in the construction industry that serves the role of "Owners Reps". Walt is also the host of the PM-Mastery Podcast.