

WorkingSm@rt®

Priority
A Better Way To Work

Centralising All Your Data

Make 365 Apps & Copilot work effectively

Who Should Attend

This course is designed for individuals and teams who need to manage large volumes of disparate data in different locations and in a variety of formats.

Format:

- 1 x 4-hours, instructor-led online session
- One-on-one personal coaching session with a skilled facilitator
- Group follow-up coaching

What's Included

- **Comprehensive Learning Guide and Resource Manual:** Individual Virtual Learning Guide plus supplements with training content to refer to, whenever you want.
- **Ongoing support:** WorkingSm@rt Helpdesk, no matter where you work.
- **LearningLink:** Our monthly productivity e-newsletter to keep you updated.

Collecting & Finding Notes

The modern working world is characterised by large amounts of data residing in different systems (SharePoint, OneDrive, On Premise etc.) in different formats (.xls, .doc, .ppt, .pdf, .mp4 etc.) that needs to be available to individuals and teams in a usable manner.

Using Lean process design and Microsoft 365 Apps & Copilot, this course shows how to design Centralised Data Storage solutions that harnesses the power of the Cloud providing scalable data access that works for everyone.

This course will help you:

- Create, edit, organize data using **Microsoft OneNote**
- Integrate Notes with other applications.
- **Email Elimination:** Centralising data using the Working Sm@rt techniques can end the need for unnecessary communication via Email or Teams – We eliminated internal emails in Priority Management Ireland and can show you how to do it too.
- Focus on Lean management of information, making knowledge sharing and collaboration simple.

Related Training:

- Working Sm@rt: Controlling All Your Work
- Working Sm@rt: Controlling All Your Communication & Collaboration

Priority Management Training Limited

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Synopsis: WorkingSm@rt: Centralising All Your Data

Is this familiar?

- Looking to reduce needless emails and posts by centralising in OneNote
- Struggling to find information easily and don't have agreed procedures
- Have a disorganised mess instead of an ordered, scalable repository
- Inconsistent approach for managing shared project plans and status
- Unable to track task assignments and deadlines
- Unsure where information should be stored to make it accessible

Our **WorkingSm@rt: Centralising All Your Data** course can get you and your team's information organised in a scalable and accessible way

Our **Lean** approach gets trainees to deploy data solutions that are easy to use with simple page and template design to that future access is as efficient as possible. Information volume is increasing exponentially and human 'spans of attention' have become shorter so solutions must make future 'data consumption' seamless.

'WorkingSm@rt' training provides process solutions that work with all technologies and applications

Effective Information Management

- Understand the Information Management issues that currently affect your performance at work.
- Identify which aspects of Information Management you need to improve.

Unit 1: Information Management Best Practices

- Identify the best practices in information management for capturing, organising, finding, centralising, sharing and storing information.
- Establish what you need to do in order to follow these best practices.

Unit 2: Getting Started with OneNote

- Understanding basic OneNote Concepts
- Understanding the structure of OneNote notebooks
- Creating, saving, sharing, opening and closing a notebook
- Using a Notebook to support a project

Unit 3: Taking Notes

- Inserting notes in sections and pages
- Creating and using templates to facilitate your individual and team note-taking
- Inserting different types of information
- Designing Pages that really work

Unit 4: Working as a Team in Shared Notebooks

- Using OneNote in a docked session to easily link information from an application or from the web

- Managing shared notebooks
- Working as a team in a shared notebook
- Managing different editions of a notebook

Unit 5: Linking, Tagging & Locating Notes

- Linking information sources
- Tagging your information
- Retrieving your information using links and tags

Unit 6: Integrating OneNote with other Microsoft 365 apps

- Using OneNote to support your daily activities in Outlook.
- Linking to Teams/Copilot Notebooks
- Eliminating needless Communications (Zero emails)



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