

OneNote: Microsoft Office's Unsung Hero?

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Hashtag #DASPG6



Scott Christensen
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Edwards Wildman Palmer LLP

- ◆ 600 lawyers
- ◆ 15 Offices
- ◆ 1300 Users

TOP REASONS TO USE ONENOTE

A Personal Testimonial

- ◆ OneNote Saved My Life
- ◆ Avoid being featured on “HOARDERS”
- ◆ It will make you more organized
 - ◆ “I guarantee it...”

Start Now Really...

- ◆ It just make sense - easy to get started
- ◆ Start simple - KISS
- ◆ Grow with it
- ◆ Not your fathers notebook/yellow pad
 - ◆ You can do amazing stuff with this thing...
- ◆ Dump your paper. You don't need it. Really.

The Stuff You Can Do With This Thing...

- ◆ Links to documents
- ◆ Links to web pages
- ◆ Audio (voice notes)
- ◆ Video
- ◆ Date/time stamps
- ◆ Calendar, task, email integration
- ◆ Send to OneNote
- ◆ Handwriting
- ◆ Search
- ◆ Edits by Author, time, Page Versions, History
- ◆ Email a page
- ◆ Tagging!
- ◆ Collaboration
- ◆ Mobility

Versions/Mobility

- ◆ Windows (Office 2010)
- ◆ IOS
 - ◆ iPhone
 - ◆ iPad
- ◆ Android
- ◆ Windows Mobile
- ◆ New mobile versions
- ◆ Improved features
- ◆ Not limited any longer
- ◆ Now free

What is a Notebook?

- ◆ Organization of Notebooks
- ◆ (Re-) Organization of Notebooks
- ◆ Move/Copy

Other Considerations

- ◆ Where to sync?
- ◆ Network shares
- ◆ SkyDrive
- ◆ Sharepoint
- ◆ Limits on file locations for mobile devices
- ◆ Information Governance Considerations

Competition

- ◆ Evernote
- ◆ Google
- ◆ Outline Plus
- ◆ ?

Next Steps

- ◆ Start using OneNote. Now.
- ◆ Stop carrying around a paper and pen.
- ◆ Utilize the mobility features to their fullest on all of your devices
- ◆ Get your staff on board
- ◆ Develop a plan of action for OneNote use

OneNote@



Rex Balboa
Systems Business Analyst
Applications & Databases



Perkins Coie by the Numbers

17 Offices

950 Lawyers, 2,100 total users



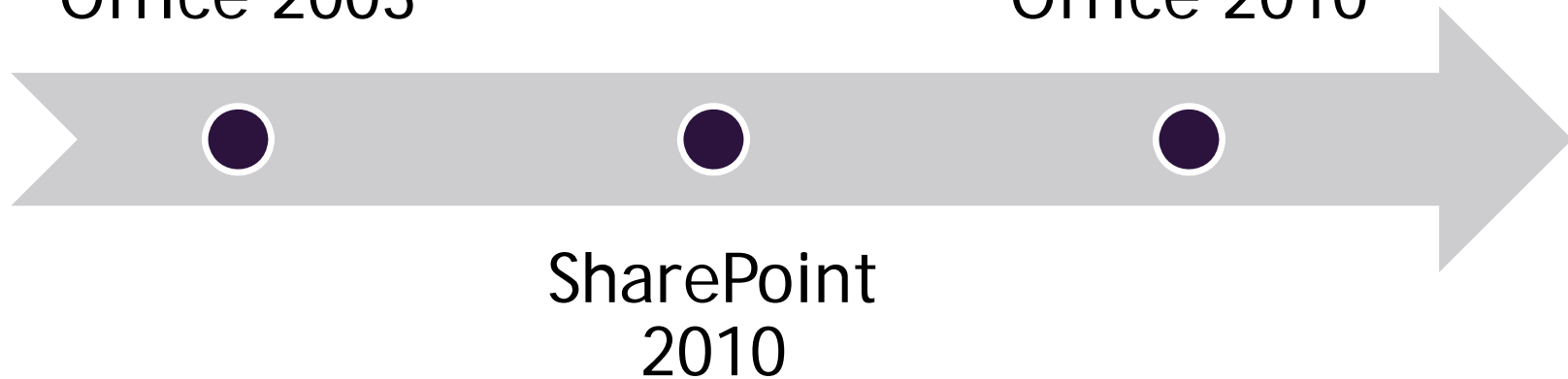
Eleven Consecutive Years on FORTUNE® Magazine's
"100 Best Companies to Work For"™ 2013



In Transition

Win XP /
Office 2003

Win 7 /
Office 2010



Guerilla Implementation

On all desktops

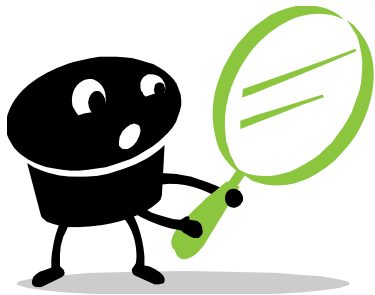
Supported by SharePoint portal

Unfettered Access to Templates

Training Champion



Sparking Adoption



Integration



Catch All

Challenges

- ◆ Notebook size <500
- ◆ Local install
- ◆ Mobile use
 - ◆ VPN
 - ◆ Mobile Noter
- ◆ Usage
 - ◆ DMS integration
 - ◆ Data redundancy

OneNote@

Jennifer Beaudette
Manager, IT Business Analysis
Applications & Development



FR Profile

- ◆ 11 Offices (US & Abroad)
- ◆ 450 Lawyers
- ◆ 1100 Users
- ◆ Sharepoint 2010 OneNote dedicated Sharepoint Application (onenote.fr.com)
- ◆ Office 2010
 - ◆ Minimal OneNote use prior

OneNote Environment

1000+ Notebooks

OneNote.fr.com

Other

>250 Case Notebooks

>500
Administrative/Team
Notebooks

>? Personal
Notebooks

The Value

- Simple & Familiar - little need for training, familiar Office suite tools
- Content Diverse - houses varied content
 - Tables & Graphs, Voice Recordings, Links to various content, Documents, Images, Notes/Text, Diagrams, Org Charts, Checklists
 - Allows for single point of entry to all case/project information
- Spatially Flexible
 - Unlike MS Word, there are no boundaries to how information is organized and presented
- Organizationally Superior - Sections, pages, sub-pages, etc. allow for ease of navigations and “sensible” content organization
- Collaborative - Co-authoring, synching, web access and mobility significantly increase OneNote value

Fostering Adoption

Show Value

- Create samples
- Partner with a case team to build business case
- Market through lawyers

Templates

- Practice specific notebook templates
- Project Management notebook templates
- Page level templates (Checklists, Weekly Minutes, etc.)

Intake and Management Processes

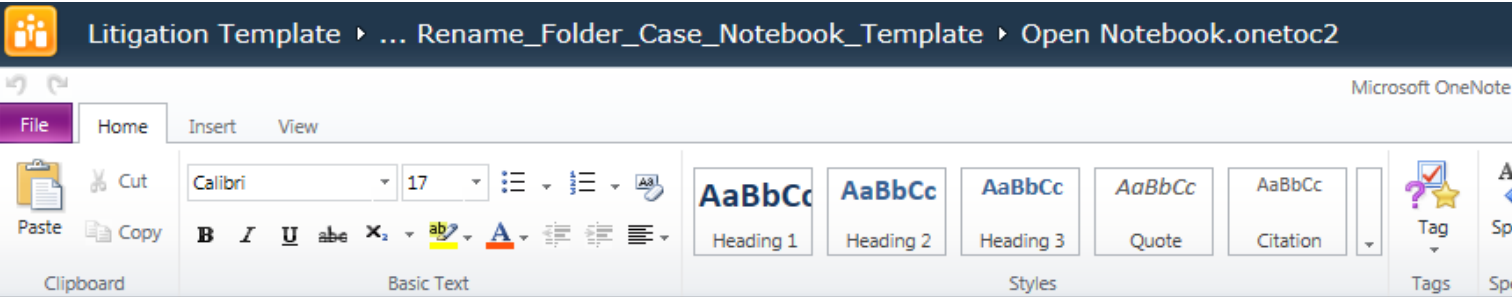
- Request form (InfoPath) - New Notebooks, Security requests, changes
- Workflows to handle requests
- Sharepoint Application (Onenote.fr.com)

Accessibility

- Links to notebook(s) in common spaces (DMS, etc.)
- Emailing links
- From OneNote client

Case Notebooks

- ◆ Single and central space for housing a multitude of case based information
- ◆ Housing information that has no other “home”
- ◆ Same structure from case to case
- ◆ Secured, if necessary
- ◆ Shared with client, if necessary



Overview & FAQs

Frequently Asked Questions:

Should I store documents within the Case Notebook or use links?

Within the Case Notebook, you can include links to documents or embed documents, the choice is yours. However, note that if you choose to embed documents, the file size of your Case Notebook will become larger and response time for syncing will become longer.

From where can I link documents?

For shared notebooks, you can link documents from any shared space, including ProLaw, lit server, or any SharePoint site. Note that if you link documents from any location other than ProLaw, moving documents will result in broken links within OneNote. Therefore, it is ideal to link documents from ProLaw.

How do I link documents from ProLaw?

Easy! The location for all ProLaw documents is: <http://d.fr.com/#####>, where "#####" is the document identification number within ProLaw. So, to insert a hyperlink, go to "Insert" > "Link" and type in the ProLaw location for the "Address."

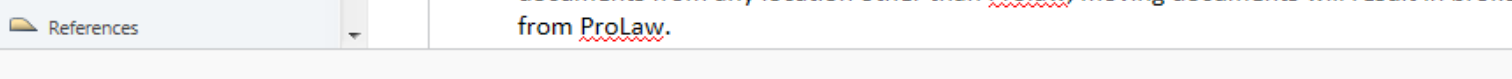
How do I get OneNote training?

The following links are self-study modules for OneNote:

[15 minute overview of OneNote 2010 video](#)

[Microsoft e-learning module on OneNote basics](#)

To schedule an instructor-led training, please contact the helpdesk at helpdesk-software@fr.com.



Other "Notable" Uses

The screenshot displays a OneNote application window titled "OneNote Repository > Shared Documents > ITDS Handbook". The main content area shows a document titled "IT Absence - Procedures" dated Thursday, January 06, 2011, at 12:14 PM. The document text includes:

IT Absence - Procedures

For all absences, such as medical, appointments, vacation, etc. should be submitted via the IT Absence Request and requested in TimeForce. Request will automatically notify the Supervisor/Manager and place the item in a pending list. Once approved, the calendar will show all IT absences across offices. Please note that this is a public and all IT staff will have the ability to review it.

Submitting your IT Absence Request

1. Navigate to site: <http://go.fr.com/admin/IT/absencerequest/default.aspx>
2. Click **New** under the **Pending Request**.
3. Type in name, select manager/supervisor, begin and end dates and time, description is optional, and the office (Leave Other Fields Blank).
4. Please remember to use the time fields, for example 9:00 am -5:00 pm.
5. Click **Save and Close**.

Below the text is a screenshot of a "Pending Requests" table with columns: Name, Begin, End, Time, IT Office, and Description. The table contains two entries:

Name	Begin	End	Time	IT Office	Description
IT Manager/Supervisor : EZD (1)					
IT Manager/Supervisor : LHA (1)					

A callout box in the upper right of the OneNote window lists the following categories:

- Manuals
- Policies & Procedures
- Knowledge Bases

The left sidebar of the OneNote application shows a "Notebooks" list with various categories, including "Win7 - Office2010" which is circled in red. Other categories include "Resources", "Tools-Software", "Education Tracking", "Sharepoint Protocols", "UI Guidelines", "Power Docket Help", "Triple Play Rollout", "Training Scripts", "Microsoft RDP", "Project High Level", "Imaging-Deployment", "Marketing", "Hardware", "Rollout Planning", "Testing - Compatibility", "Technical Support", "Development", "BitLocker", "Software Licensing-Installs", "ITDS Production Checklist", "Marketing Plan", "OM Communication", "Office Timelines-Checklists", and "Floor Support Checklist".

On the right side of the image, there is a partial view of another document with text mentioning "system in both 32-bit and 64-bit", "XP systems, it is crucial that all", "ese tasks. For the initial", "llation (ZTI) method, utilizing", "lease - etc. etc - adequate drive", and the logo for "the catalyst".

Expansion Areas

- Grow and Refine Templates
- Self Service Creation Automation
- Retention Policy Compliance
- Ethical and Business Wall Management

Words of Caution

- ◆ Capacity Management
 - ◆ Promote LINKING to documents
 - ◆ Overloading with documents causes issues
 - ◆ Syncing
 - ◆ Integrity

What's New in 2013

- ◆ Cloud based Notebooks
 - ◆ Accessibility from multiple devices
- ◆ Improved Table creation and formatting
- ◆ Better integration with Excel and Visio (2013)
- ◆ Lync based sharing
- ◆ Touch command capabilities
- ◆ Improved Office integration “Send to OneNote” tools