

TechMatters: We're in this Together: Using Technology to Facilitate Collaboration, Part II

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In part one of this article, we discussed two freely available technologies, instant messaging and e-mail, and considered how they could be leveraged to facilitate team work and collaboration. Now, in this follow-up I would like to introduce you to Microsoft Office OneNote, a commercial product which is an ideal tool for organizing and managing collaborative projects. Although this tool is not free, it is typically included with most of the recent versions of the Microsoft Office suite; if not, the cost is typically under USD \$100. Since Office is one of the most commonly used productivity software packages, many of you may already have ready access to this powerful organizational and collaborative tool. Unfortunately, Microsoft has yet to develop a version of OneNote for the Mac, so for now this tool is only available for Windows users.

OneNote Basics

Based around a three-ring “notebook” metaphor, OneNote allows users to take notes in multiple formats, compile different sources of information in one place, and easily organize and rearrange that information. As such, it is ideally suited to replace the physical notebook or the Microsoft Excel file you may currently be using (along with probably a bevy of Post-it notes) to help manage complex projects where relevant information may come from a host of different sources and in a variety of formats.

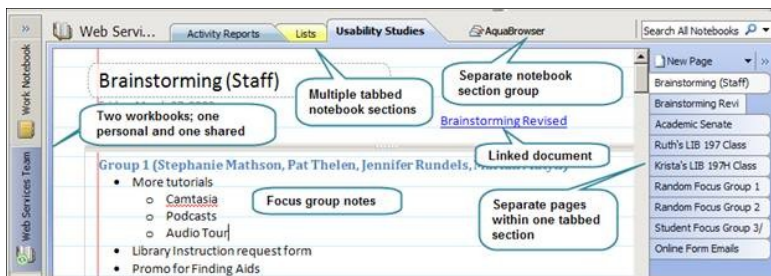


Figure 1: Basic OneNote notebook setup and layout

As you see in Figure 1, information in OneNote can be easily organized using the familiar and intuitive concept of an old-school style notebook. A user may create multiple “notebooks”, which can then be subdivided using section headings and tabs. Within each tabbed section, you may create as many pages and sub-pages as you desire.

On each page, notes and information in a variety of formats can be easily added, edited, and moved around

the page. This frees you from the enforced linearity of a physical notebook: if you’ve “written” something down on one page that fits more logically somewhere else on that page, or on another page entirely, you can quickly move it. In addition to directly typing notes onto a page, users can insert links to separate notebook pages and/or documents in other formats (e.g., Word, Excel) that may reside elsewhere on their computers, or even on a network drive. Similarly, multimedia materials including images, audio recordings, and links to web sites may also be embedded in OneNote pages. Each element that is added to a page resides in a “note container” that can be dragged to any location on the page. This makes rearranging information on the page extremely simple and quick.

One particularly useful feature of OneNote is the ability to capture any content that appears on your computer screen, insert it into your notebook, and then provide any necessary further annotation. Capturing a screen image is as simple as clicking on the “Clip” icon (see Figure 2) on the OneNote menu bar, highlighting the section of the screen you wish to save, and clicking your mouse button. The clipped image will be dropped directly into your open note page, where it can then be annotated using both the regular note taking capabilities of the program, as well as the program’s drawing tools. This functionality can be extremely helpful in later communicating visual information to team members who may not be physically present during a discussion. If needed, you can insert such screen captures into other applications including word processing documents and e-mail. In other words, you can quickly email any item or page you have in OneNote, whether the recipient has OneNote or not.

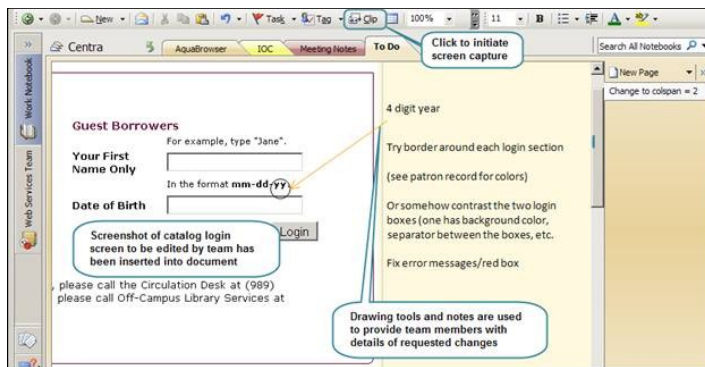


Figure 2: Using screen capture, note taking, and drawing tools to facilitate work on a team project

Because it is a part of Microsoft Office, OneNote integrates well with the other programs in the suite. From my perspective, the most useful of these integration features are those associated with Outlook. From within the Outlook mail interface, you can send a complete copy of any message directly into OneNote with the click of the “Send selected e-mail to OneNote” toolbar button (). Similarly, you can use the “Meeting Notes” button in a calendar appointment to create a page in OneNote that includes the meeting details, as well as a link back to that calendar event (see Figure 3).

Sharing Notes

There are three ways to share notes that are created using OneNote: e-mail, shared notebooks, and live sharing sessions. First, you can easily send a copy of any page in your notebook by clicking on the e-mail icon () in the OneNote toolbar. This is an ideal way to share meeting notes with all members of a group when only one has been assigned to take minutes. A copy can be distributed via e-mail and then added to each team member’s individual OneNote notebook.

Alternately, you may choose to setup a “shared notebook” that is accessible to all members of a group and where documents may be viewed, added, and edited by any team member. This is similar to a wiki but has the advantage, because it is all within OneNote, of allowing each individual team member to quickly access any notes & files in their personal notebook and share any of that information, if it is pertinent to the entire team, via the Shared Notebook. In order to do so, it is necessary to have access to a shared server where the notebook can be stored, or be willing (and authorized) to setup a shared folder on your own computer. In a shared notebook, multiple users may access and make changes to pages simultaneously. In addition, pages may be accessed and edited even when a user is offline. A copy is stored on each individual’s computer, and then automatically updated and merged with the shared version the next time that they connect online.

Finally, you may host a “live sharing session” which allows OneNote to function as a virtual whiteboard where team members may work together on a project in real time. To initiate a shared session, you simply select “Live Sharing Session” from the **Share** menu, and then follow the setup instructions that will prompt you to create an optional password prior to starting the session. Once the session is initiated, you may invite users to join you. Invitations are sent via e-mail and contain all of the necessary information to connect to the session with the exception of the password which should be communicated using an alternate delivery mechanism. Once a user joins the shared session they will be able to make changes to any shared section of the notebook using all of the standard OneNote features.

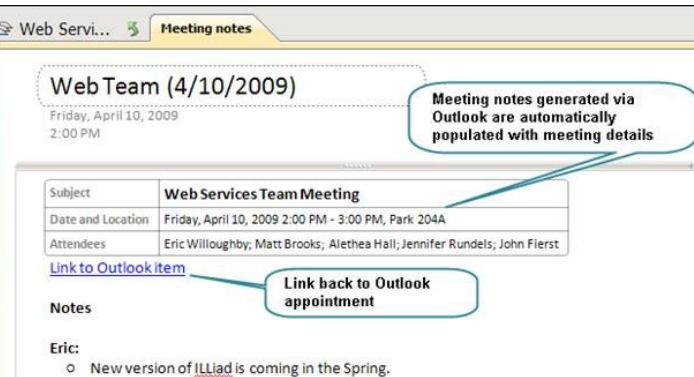


Figure 3: Meeting notes template automatically generated from and linked to an Outlook appointment

Finally, if you find yourself writing something down and thinking, “Oh, that’s a task I’ll need to get done by Friday,” you can quickly and easily create Outlook tasks from within the OneNote interface using the “Task” button on the toolbar (see Figure 4). This opens an Outlook task form where you can setup the details. As with any Outlook task, it can be added to your own task list or assigned to another member of your team. The new Outlook task is automatically linked to the item in OneNote, so when updates are made on the status of the task in one program they will also appear in the other.

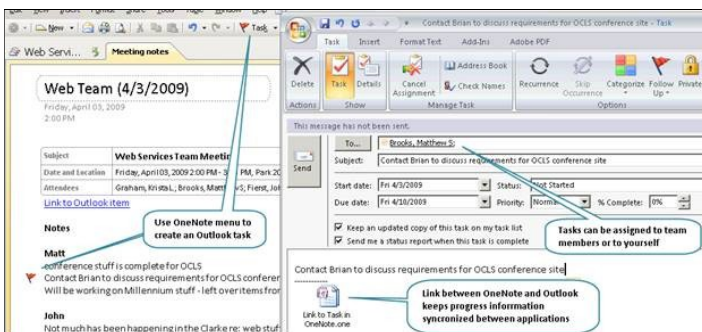


Figure 4: Create and assign Outlook tasks from within the OneNote interface

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When Dr. Helen Caldicott was asked about voter apathy in America, she said it was a blessing. “Would you really want all those morons to vote? The government and media keep you fat and stupid.” I see that. I live in California, a state currently in the throes of a major existential crisis, due in no small part due to the bevy of “popular” ballot proposals. Excuse me, but do I really want the mob driving change in an institution as important as libraries?

- “Upgrading the universal consumer library experience is key – physical libraries need to be a nice place to spend time in, with facilities that any leisure destination would have with coffee shops and loos...” Amanda Ridout, Advisory Council on Libraries

We need to “upgrade” (from beta?) the “universal” (aka, white) “consumer” (Sorry Karl Marx; it seems like your time in the British Library didn’t pan out) “library experience” (Your call is important to us). Libraries are now a “leisure destination” (like water parks and roller coasters). No books, apparently, but a place for a Frappuccino™ and a pee.

- “The number of students using the library there [University of South Florida] rose by a staggering 145,000 a year following the opening of Starbucks and the library is once again the hub of campus life.” Darcy Willson-Rymer, Managing Director, Starbucks UK & Ireland

It isn’t the library that’s a hub of campus life. It’s a library building with couches and wifi and caffeine. A student union annex with some books.

Patron: Yeah. Like how we spend all this money on AIDS.

Librarian: And you consider this a negative (a “con”)?

Patron: Y

Librarian: I read last week that HIV/AIDS is the leading cause of death for black women (including African American women) aged 25–34 years.

Patron: Are you gonna help me?

Librarian: I thought I was?

Patron has left chat.

....

I stop at the hospital on my way home from work.

“I’m here to see how Sadie is doing,” I tell the nurse in the ICU.

“Oh. Didn’t they call you?”

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In Summary...

As library work and workplaces continue to evolve, we will no doubt be called upon to continue to work collaboratively to reach our goals. Although teamwork can be engaging and exciting, it can also be very complex and challenging as we seek to manage people, projects, and resources. Fortunately, technology tools such as those discussed in this two-part series have been developed to facilitate teamwork and help us to collaborate more efficiently and effectively.