Solving the problem of "Project Support Material" with Microsoft OneNote 2007

For me, GTD has always worked extremely well for those small(er) projects. You know - those little things that used to fall through the cracks but, with the help of GTD, are now easily tracked and moved on until completed.

These smaller projects don't need much in the way of "project support material" (PSM) - maybe just 4 or 5 lines of information to keep close at hand to help finish the project. For me, I have mostly used the "notes" section of a project task item in outlook for a good and easy place to put this type of PSM.

But...what about those larger projects? This might be a 2 week vacation to Europe (travel books, emails, reservations, tickets, list of things you want to do and see, things to pack) or it might be a multi-million dollar work project that has 8 months worth of project plans and milestones, 247 emails, 156 page reports, bi-weekly meetings, and 7 team members (complete with collaboration). Ahh!

- ☑ NA's in my face? **Check.**
- ☑ Reference material easily accessible? **Check.**
- ☑ Project list reviewed weekly? **Check.**
- ☑ Project plans and ideas written down and processed? **Check.**
- ☐ Know where to locate project support material? *Nope.*
- ☐ Project support material easily accessible? *Nope.*
- ☐ Trust my GTD system? *Nope.*

My GTD system brakes down with that kind of complexity. Of course I have places to put all that stuff (physical files ala Mr. Allen, email .pst folders/files, digital folders/files, network drives, sharepoints sites) - but it was always just too overwhelming. Unless I had *just* filed away an important piece of PSM, I would quickly forget where it was. And that had very negative consequences on me and my work.

- I had an aversion to create, process, and organize PSM for larger projects.
- When I did get around to organizing PSM, I had an aversion to go hunting for it when I needed it.
- I had an aversion to include "review project support material" as part of my weekly review – because it was just too much. One project could take an entire morning!

As a result I found myself primarily adding to and working on completing the smaller projects that did not create as much stress – but which also didn't produce the results I wanted in my life at the 30k to 50k levels.

Sound familiar? Well, I've got good news. As of 4 months ago all that has changed. Let me (quickly) introduce you to my new "tool that I can't live without" – Microsoft® OneNote® 2007.

I now:
-   Create a OneNote (ON) "book" for each major active project (and little one pagers for the smaller projects)
-   Bring in *all* my PSM into ON (ideas, emails, files, project plans, meeting minutes, photos, screen captures, internet research, voicemails, conversations, and even A/V files!)
-   Brainstorm my projects in ON
-   Use hyperlinks in ON to access project material like folders, files, websites and even other sections in ON.
-   Work through my projects using ON as my project cockpit.
-   Create my next actions in ON – and they are automatically synched with Outlook Tasks.
-   Share my project ON book with my project team members so we can collaborate and move our project forward together.
-   Link my meeting minutes from my outlook calendar appointment to ON where they are easily tasks, shared, and organized.
-   Use ON for my weekly review and have no problems with reviewing and working with really big hairy projects.
-   Use the ON live search to find random bits of information as needed.

With ON I've been able to create a workspace that allows me to be free-form and creative (brain dump, mind map, scribbles), and easily build in structure to organize it all really quickly and intuitively.

I'm back on the GTD (band)wagon baby!

Although this post has been focused on using ON to solve the "project support material" problem, it has many more wonderful uses like:

-   Managing contact information
-   Managing copious amounts of reference material (and not limited to just text)
-   Keeping a daily work journal
-   Allows me to print way less paper
-   Serves as a necessary "digital inbox"
-   Allows me to carry my entire filing cabinet to all my meetings
-   Access important information faster than anyone else in my office

Maybe I'll be invited to make a ON series for GTD Times. I'm ok with more work –
I've got a system now that handles it.

Here are a couple of screen captures of my OneNote system. The first shows what a
linked "Task in OneNote" looks like in Outlook. The second shows how I organize my
OneNote books.

I use the "Inbox" book for quick capture (voicemail, screen grabs, thoughts) before I process and organize. Within my Inbox I create a page for the current day and just keep a running tab.

Exactly as it sounds - this is the book I use to organize all my work reference. With books, sections, pages and sub-pages it's easy to find a home for everything and anything.

This is an example of a "Project" book. It is broken up into sections that make sense for my project. I can "NA" any item in these books and the task will show up in my Outlook automatically.