Using OneNote to Manage Your Notes and Much More



Presented By
John H. Higgins, CPA.CITP
CPA Crossings, LLC



John H. Higgins, CPA.CITP Strategic Technology Advisor



jhiggins@cpacrossings.com

Strategic technology advisor to the profession w/ 35+ years of experience

Nationally recognized author and presenter on CPA technology

Former National Mid-market Technology Partner - BDO

Cygnus Media Top 25 Thought Leader for the profession

AICPA Business & Industry Hall of Fame Inductee

MICPA Innovative User of Technology Award

Past Chair of the Michigan Association of CPAs

Passionate advocate for the CPA profession!



Learning Goals



After attending this presentation, you will ...

recognize the value proposition for integrating the OneNote app into your daily work.



Presentation Outline

- OneNote Orientation
- Group Lab Exercise
- ➤ Wrap-Up



What is OneNote?

Digital version of a paper notebook binder

Replaces folders, binders, notepads and sticky notes

Central note-taking and content management repository

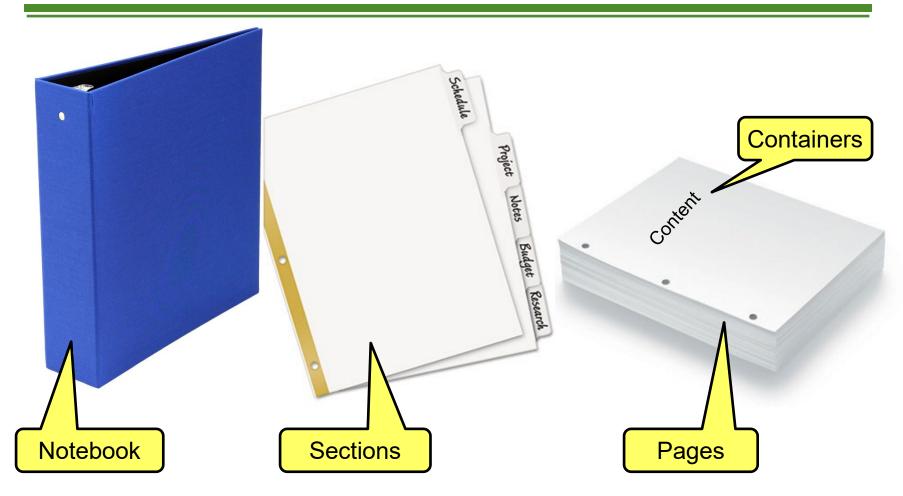
Capture ideas and information in digital format

Included with Microsoft Office and Windows

Shareable

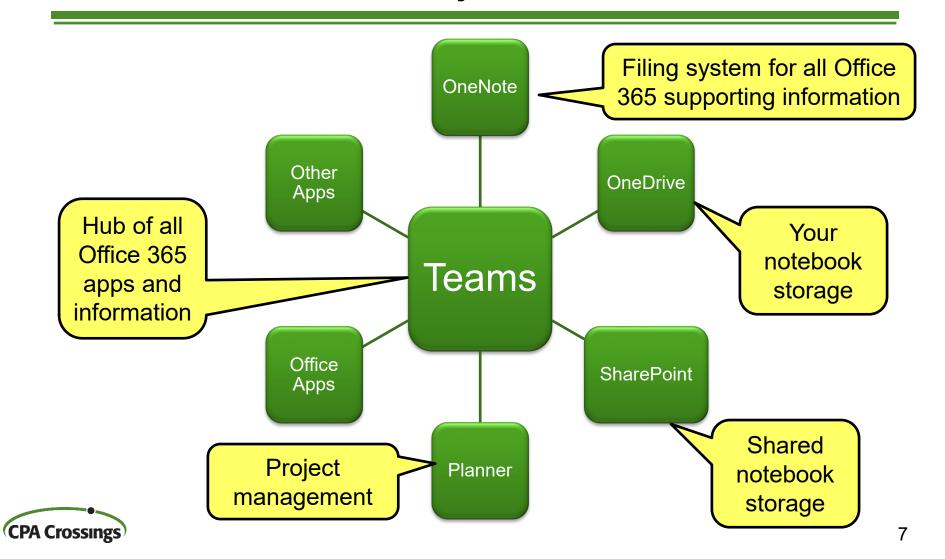


OneNote Organization





Office 365 Ecosystem & OneNote



Group Lab Exercise

- Create notebook
- Create section
- Create page
- > Add content
- > Tag content
- Email the page
- Share the notebook
- Send email to OneNote



WRAP-UP





Presentation Wrap-Up

- OneNote is "low hanging fruit"
- The utility of OneNote is far reaching
- All the versions of OneNote work in harmony
- Leverage the notebook sharing capability
- Link notebook to team
- Start simple and build from there



Questions?





THANK YOU!

We hope you enjoyed this presentation. To learn more about CPA Crossings visit

www.cpacrossings.com



