

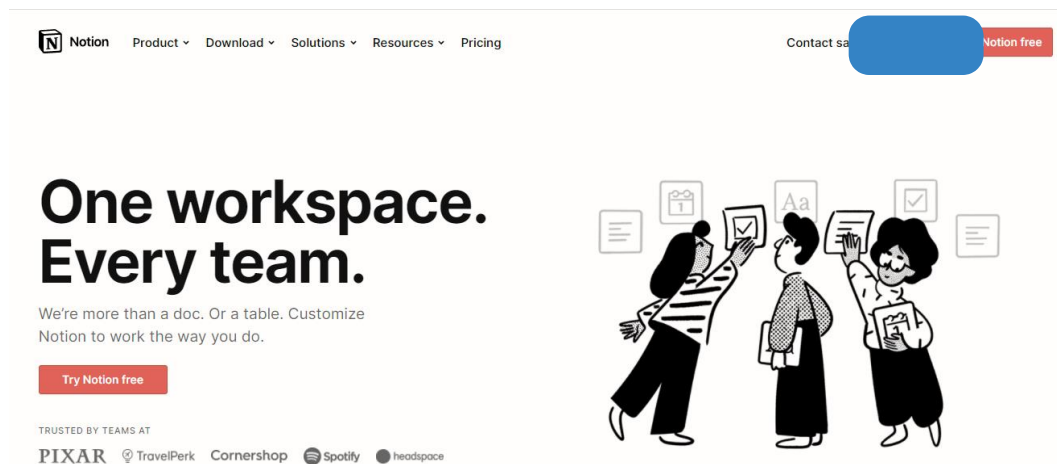
Welcome to Notion! *(Created 1/4/2022, Updated 1/6/2022)*

Notion is an all-in-one tool that allows team members to access important resources/tools, manage tasks/projects, and collaborate with each other. Below you'll find the instructions you'll need to navigate the basics. You can scroll or click on the links provided below to jump to specific instructions.

- [Logging Into Notion](#)
- [Navigating Notion](#)
- [Creating Content and Editing Content](#)
- [Collaborating with Team Members](#)
- [Task Management and Prioritization](#)

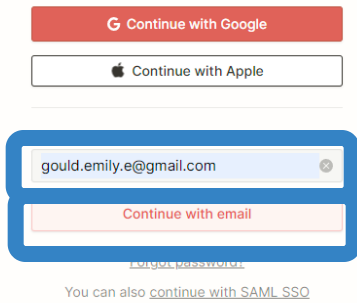
Logging Into Notion

1. Go to <https://www.notion.so/>
2. Click on 'Log In' in the top, right corner.



3. Input your work email address in the 'Email Address' field. Click 'Continue with Email'.

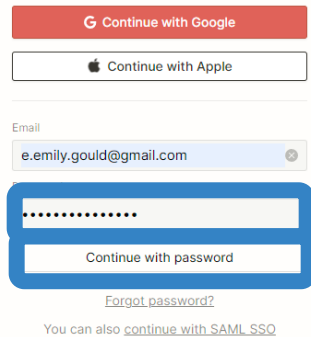
Log in



The screenshot shows the Notion login interface. At the top, there are two buttons: 'Continue with Google' (red) and 'Continue with Apple' (white). Below these is a horizontal separator line. Underneath the line is an email input field containing 'gould.emily.e@gmail.com'. Below the email field is a button labeled 'Continue with email', which is highlighted with a blue rectangular box. Below the 'Continue with email' button is a link for 'Forgot password?'. At the bottom of the form, there is a note: 'You can also [continue with SAML SSO](#)'.

4. Input your password in the 'Password' field. Click 'Continue with Password'.

Log in



The screenshot shows the Notion login interface. At the top, there are two buttons: 'Continue with Google' (red) and 'Continue with Apple' (white). Below these is a horizontal separator line. Underneath the line is an email input field containing 'e.emily.gould@gmail.com'. Below the email field is a password input field with a blue rectangular box around it. Below the password field is a button labeled 'Continue with password', which is also highlighted with a blue rectangular box. Below the 'Continue with password' button is a link for 'Forgot password?'. At the bottom of the form, there is a note: 'You can also [continue with SAML SSO](#)'.

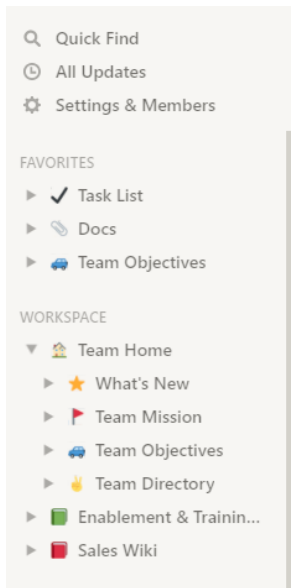
5. After logging in, you should be taken directly to the PandaDoc Test Environment Notion homepage.

Navigating Notion

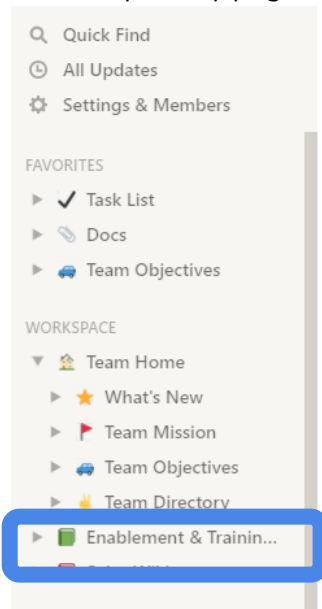
There are several ways to navigate Notion. Choose the method most comfortable for you. These navigation methods apply to both 'Workspace' and 'Private'.

Sidebar

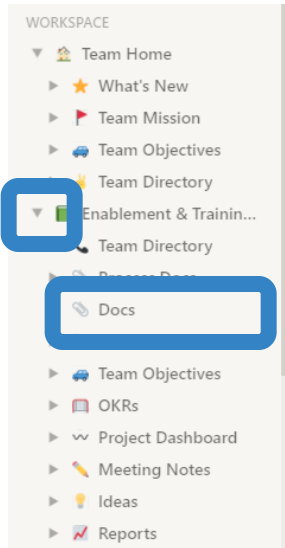
1. Locate the sidebar on the left side of Notion.



2. Select a primary page.



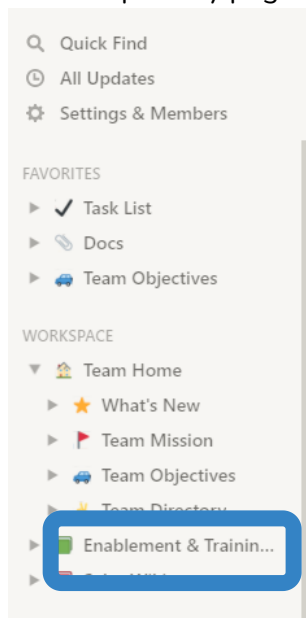
3. Click on the arrow to the left of the primary page name. A drop-down of sub-pages should appear. Select a sub-page.



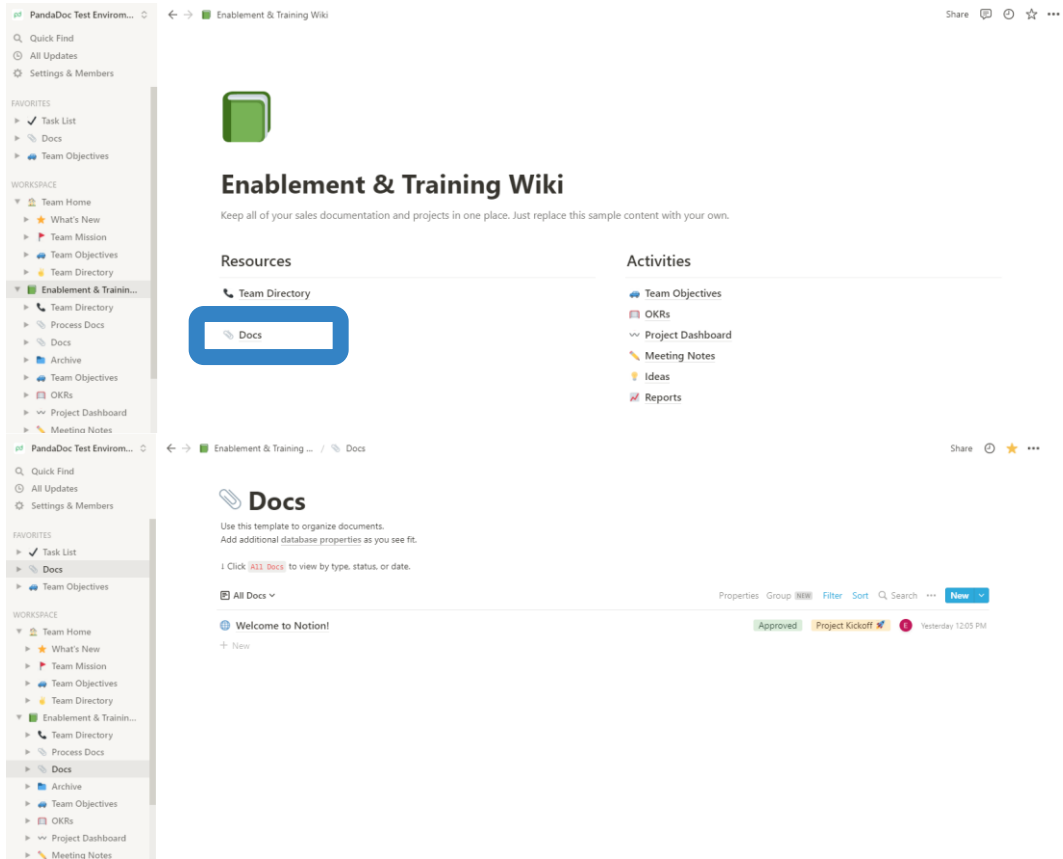
Navigation Bar and Linked Sub-Pages

1. Locate the navigation bar on the left side of Notion. *(Instructions continue on next page.)*

2. Select a primary page.



3. Within the primary page, click on any linked sub-pages to access the sub-page.



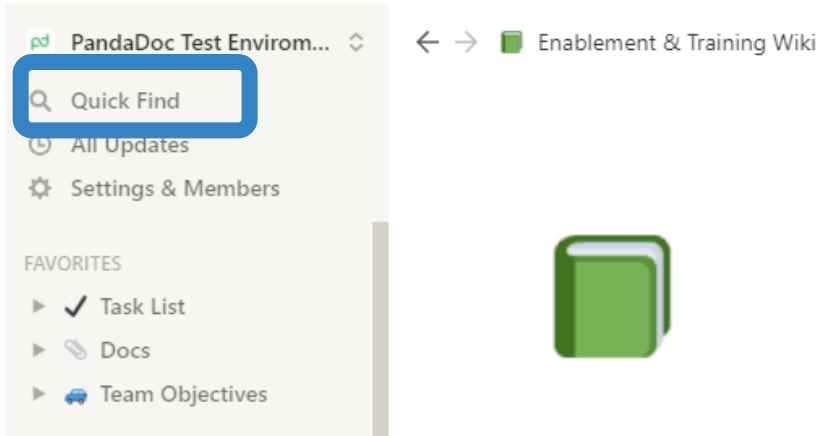
Favorites

In the top, right corner, click on the star to favorite a page you need to access frequently that may be several sub-pages deep.

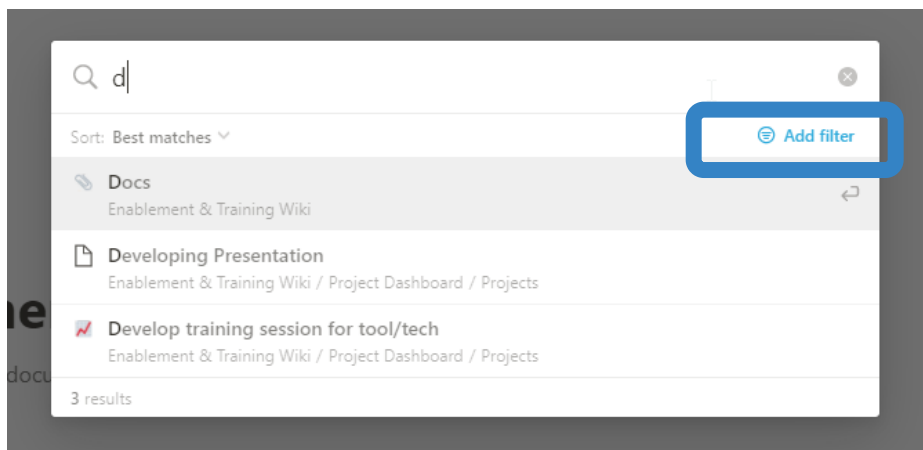
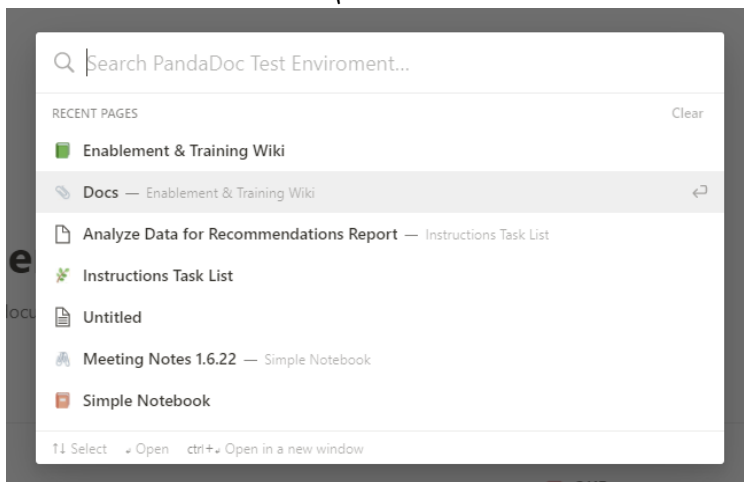


Quick Find

1. In the top, left corner, click on 'Quick Find'. A search bar will appear.



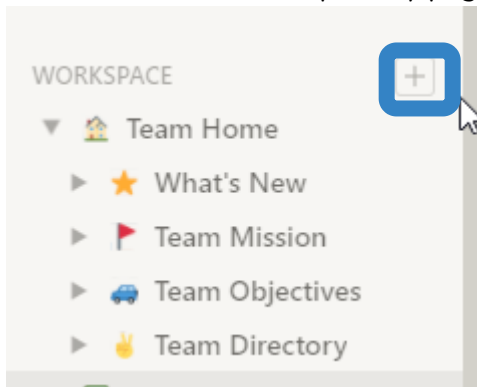
2. Recently visited pages populate, but you can type what you're looking for. Filter to find the content needed. (See filter screenshot on the following page)



Creating and Editing Content

Content can be fully customized and made on a blank slate, but Notion also provides prompts and templates you can utilize when creating new content. This makes creating content simple and easy to learn. The instructions below highlight the process for starting on a blank slate and editing.

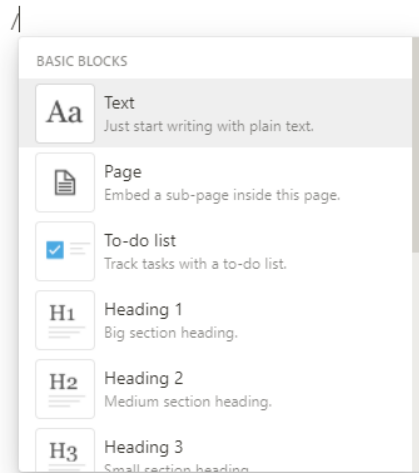
1. Within the navigation bar, click on the plus sign on the right side of 'Workspace'. This will create a new blank primary page.



Note: To create a new sub-page, click on the plus sign on the right side of a primary page in the navigation bar.

2. All content is created in 'Blocks'. To create a new block, click on the newly created page and type '/' or click the plus sign next to where you are typing. Both bring up the list of block options (Basics, Inline, Database, Media, Embeds, and Advanced). The '/' allows you to type and search for the block you're looking for while the plus sign allows you to scroll.

Untitled



Untitled

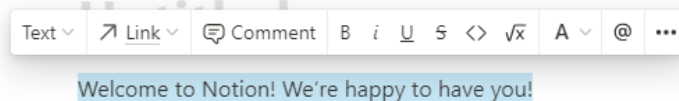
+ ⋮ |type '/' for commands

3. Create a 'Text' block. Type a sentence.

Untitled

Welcome to Notion! We're happy to have you!

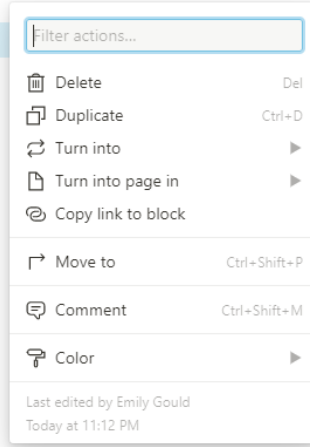
4. Highlight the sentence you typed. A formatting bar appears when you highlight text. This formatting bar allows you to style the text including turning the text into a different block, linking the text, commenting on the text, formatting the text (bold, italics, etc.), changing the text color/text background color, and @ing a person, page, or date.



5. Click the three dots on the right side of the formatting bar. These three dots pull up features from the formatting bar as well as the ability to delete, duplicate, and move the block.

Untitled

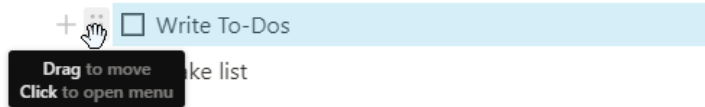
Welcome to Notion! We're happy to have you!



6. Click the six-dot icon on the left side of the block and drag. This allows you to drag the block anywhere on the page and create various page structures such as multiple columns.

Notion Introduction

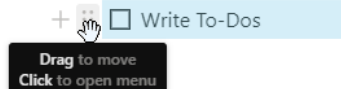
Welcome to Notion! We're happy to have you!



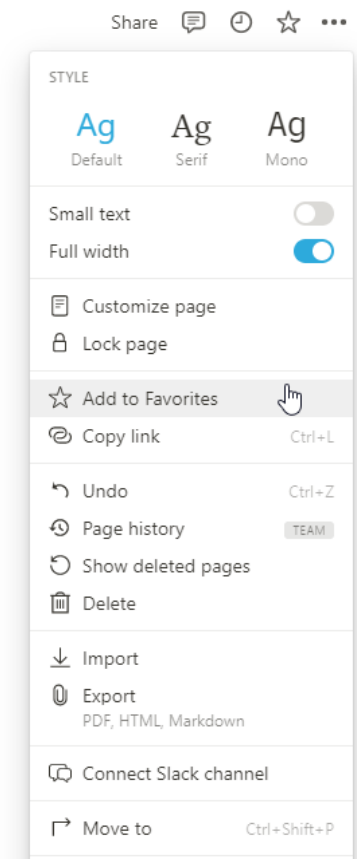
Notion Introduction

Welcome to Notion! We're happy to have you!

Make list



7. Click the three-dot menu in the right corner of Notion. This menu allows you to set a text style, text size, page width, and to lock the page to avoid content getting moved or deleted by accident.



Collaborating with Team Members

Commenting

1. Highlight text (a sentence or word) and select 'Comment' from the formatting bar or click the six dot icon on the left side of the block and select 'Comment'.



All Hands Notes

2. Type a comment in the comment box and hit 'Enter' on your keyboard to publish the comment.

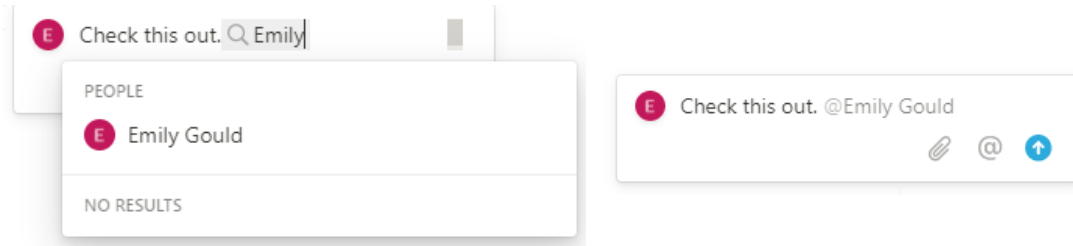
All Hands Notes



Mentions

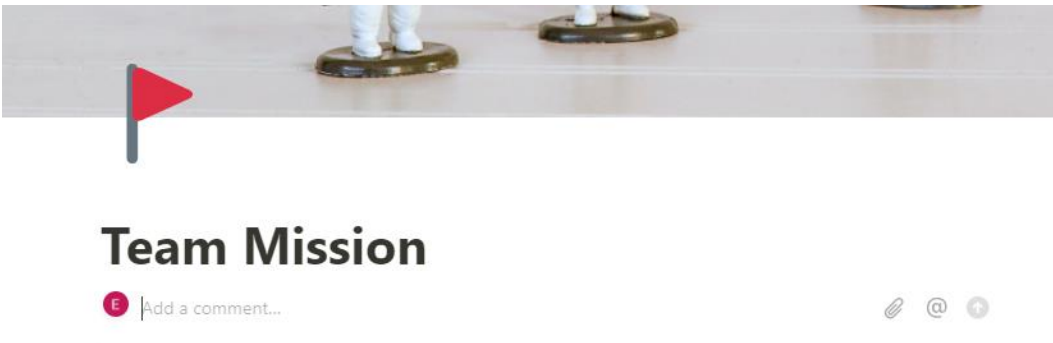
To ensure a specific team member sees a comment, type @(Enter User's Name Here). (I.E.

@Emily Gould)



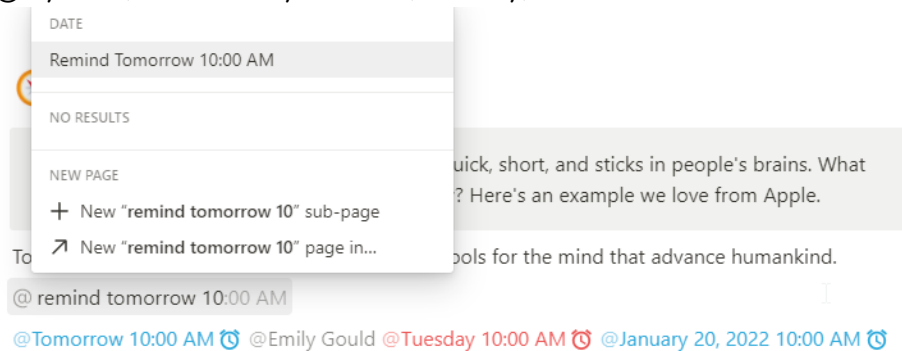
Discussions

On each page, directly below the title, a comment can be added to start a discussion. The mention feature (@(Enter User's Name Here)) can be utilized in the discussion section as well.



Reminders

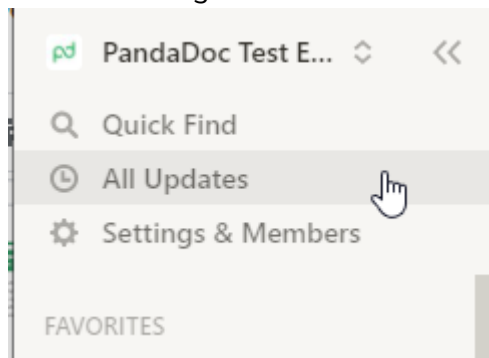
Reminders can be set up anywhere on a page. Treat the reminder like a mention and use the @ symbol, followed by 'remind', the day, and the time. Hit 'Enter'.



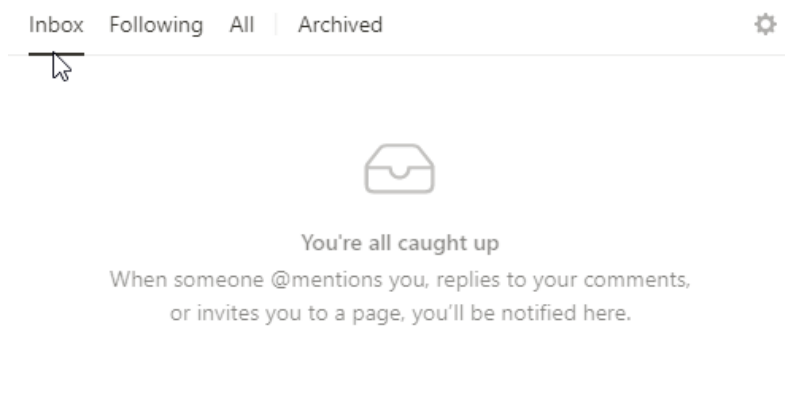
Note: Mention users on the same line after setting a reminder to set a specific reminder for a specific user.

All Updates

1. Go to the navigation bar on the left and select 'All Updates' near the top.

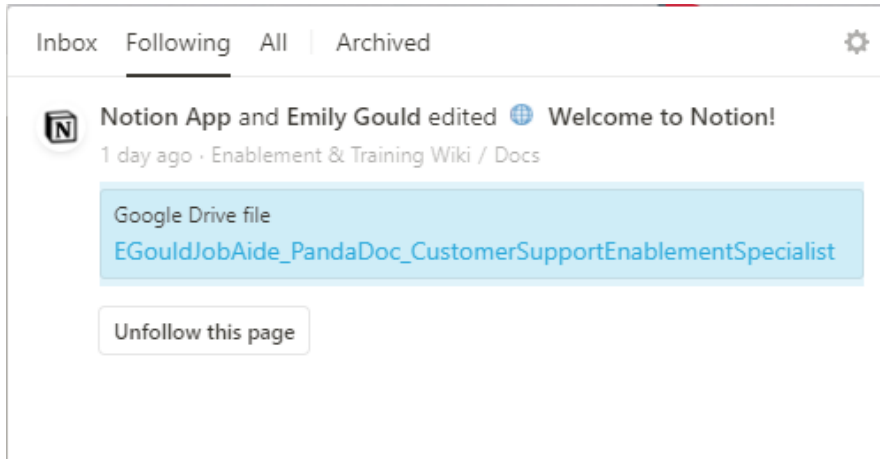


2. Go to 'Inbox'. The inbox lets you know when you've been mentioned, someone has replied to your comment, or when you've been invited to a page.

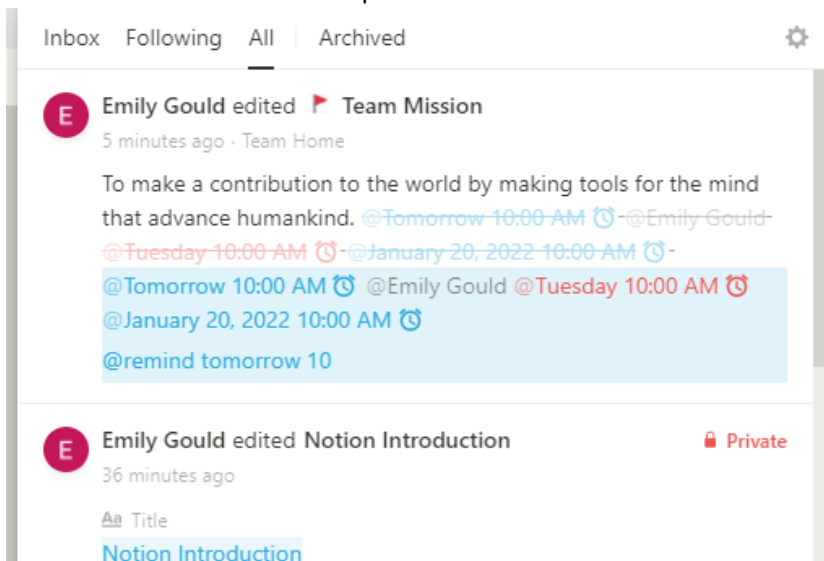


Note: A red badge appears for new mentions. You can reply to, resolve, and archive comments from this notification.

3. Go to 'Following'. Following shows all the updates made to pages you use and who made the updates to those pages.



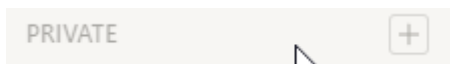
4. Go to 'All'. All reflects all updates that have been made across the Notion workspace.



Task Management and Prioritization

The board view for content in Notion is one of the best tools to assist with task management and prioritization. There are templates for task lists featuring the board view but the instructions below focus on starting with a blank slate in the 'Private' Workspace.

1. Click the '+' button next to 'Private' in the navigation bar on the left of Notion.



2. A variety of prompts will appear. Select 'Board' from the 'Database' section.

Untitled

Press Enter to continue with an empty page, or pick a template (14 to select)

 Empty with icon

 Empty

 Templates

 Import

DATABASE

 Table

 Board

 List

 Calendar

 Gallery

 Timeline

3. Give the new page a title and select an icon for it.

 Add icon  Add cover  Add description

Untitled

4. Cards are tasks. Select a 'Card'.

Test Task Management

+ Add a view

 No Status 3  + Not started 0

Card 1   + New

Card 2


Card 3

+ New

5. Name the card a task you need to complete.

Analyze Data for Recommendations Report

 Assign Empty

 Status Empty

+ Add a property

 Add a comment...

Press Enter to continue with an empty page, or [create a template](#)

- Below the title there is an 'Assign' property. Input your own name in the 'Empty' field next to Assign. This is not necessary for personal task lists, but it is a good habit to build to ensure you assign tasks in collaborative task management pages.



 Assign  Emily Gould


 Status Empty

+ Add a property


Note: 'Assign' is one of the many properties that allows you to link, transform, and organize content in Notion. Properties are also used to create filtered views.

- Select a 'Status' for the task. Click into the 'Empty' field next to 'Status' and select an option from the drop down menu.

 Assign  Emily Gould




 Status

+ Add a property

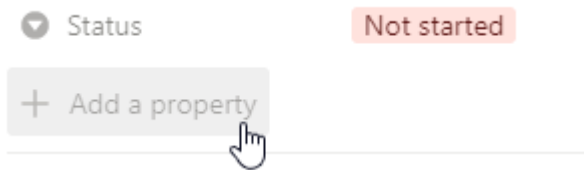
 Add a comment...

Not started ✕

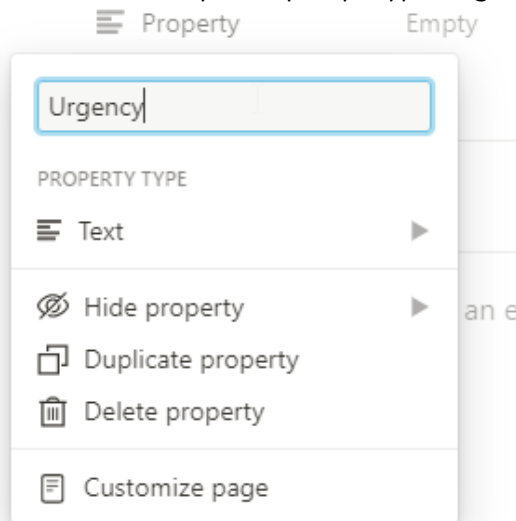
Select an option or create one

-  Not started
-  In progress
-  Completed

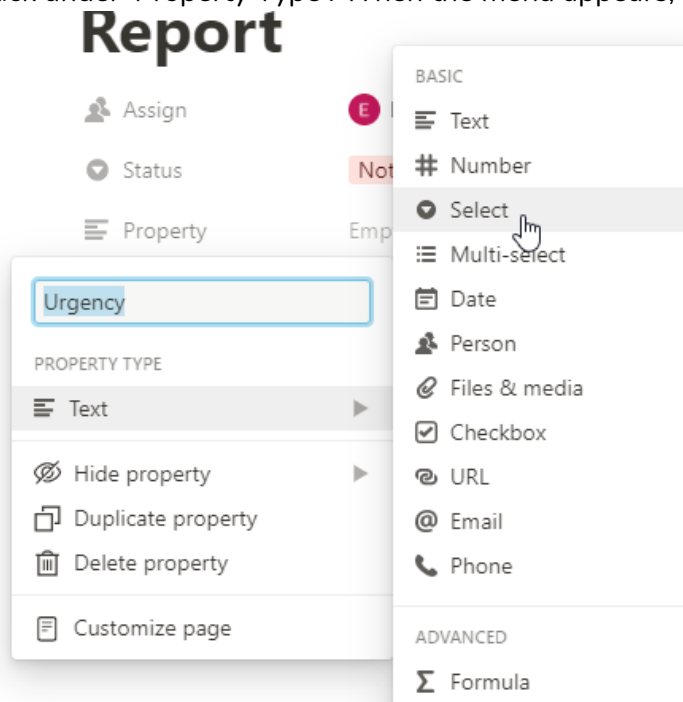
8. Click 'Add a property' below 'Status'.



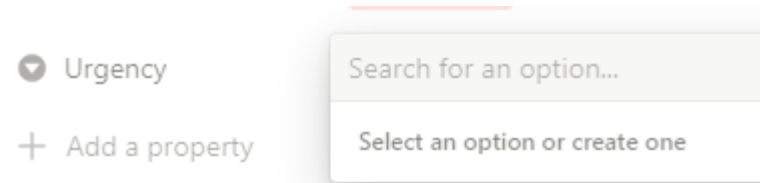
9. In the field that says 'Property', type Urgency.



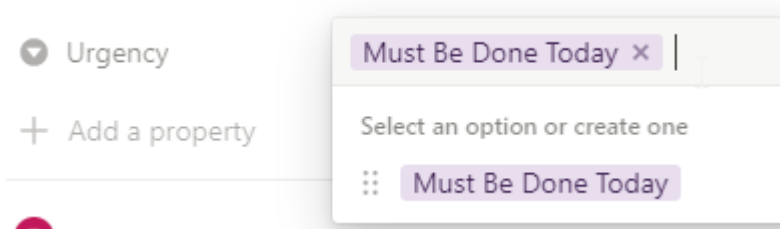
10. Click under 'Property Type'. When the menu appears, click on 'Select'.



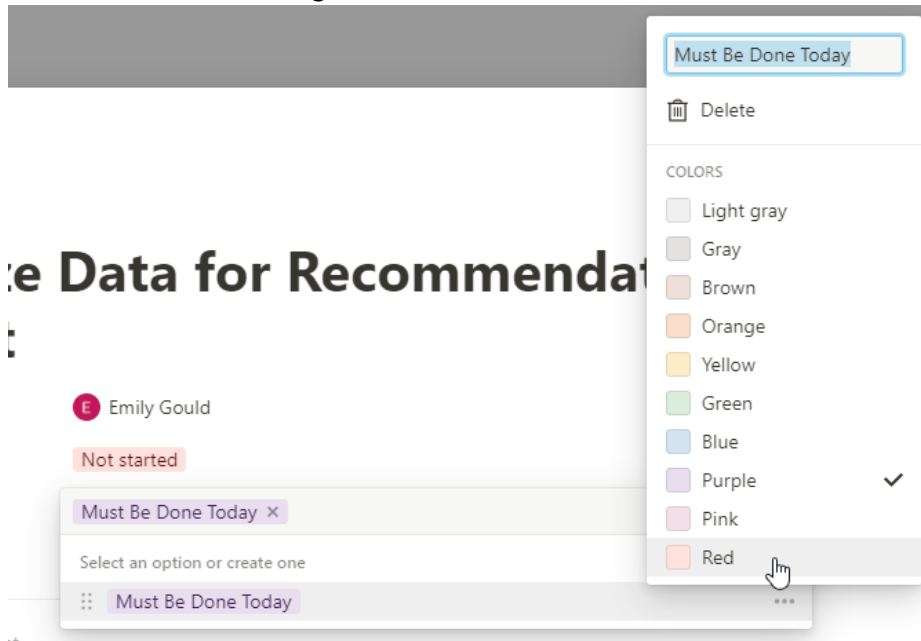
11. Click into the 'Empty' field next to 'Urgency'.



12. Type, Must Be Done Today, and hit 'Enter'.



13. Click on 'Must Be Done Today'. Hove over it in the drop-down menu and click on the three-dot icon on the right. Select a color for this label.



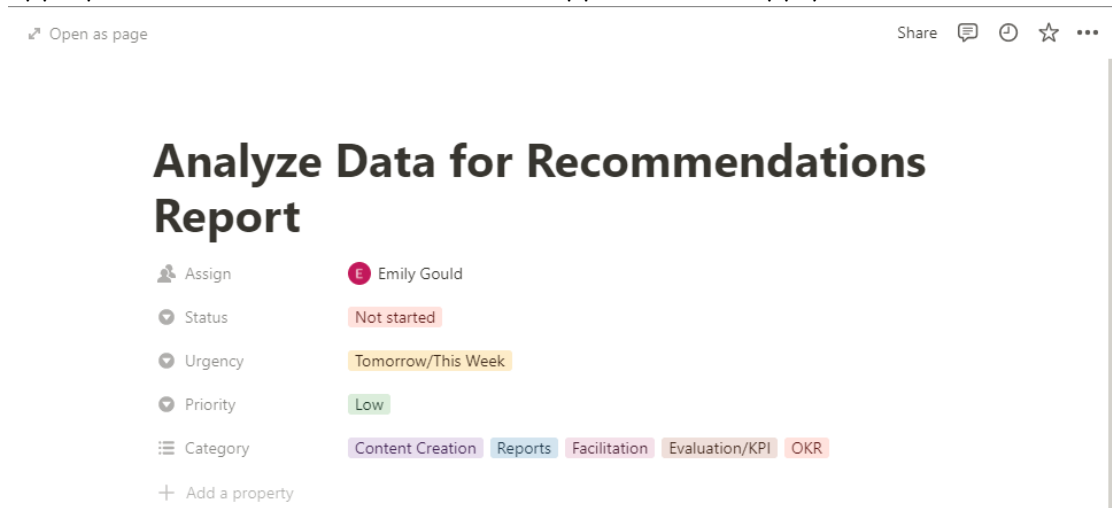
14. Repeat steps 11 through 13 to create the following labels: Tomorrow/This Week, On Radar/Next Few Weeks, and Completed.

15. Create a 'Select' property called 'Priority' with the labels: High, Medium, and Low using steps 8 through 13 for guidance.

16. Create a 'Multi-Select' property called 'Category' with the labels: Content Creation, Reports, Access Set Up, Facilitation, Distribution, Research, Communication, Evaluation/KPI, and OKR. Use steps 8 through 13 for guidance.

17. Select the appropriate labels for each property for the task. If there is not an

appropriate label, create one that will be applicable and apply it.

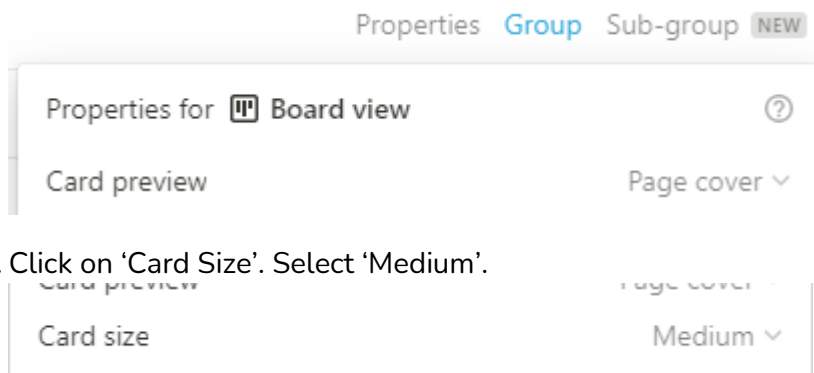


18. Click anywhere in Notion to get out of the task.

19. Once you are back in the Task Management page, go to 'Properties'.

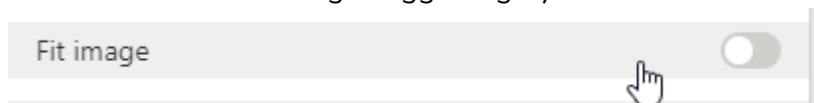


20. Click on 'Card Preview'. Select 'Page Cover'.

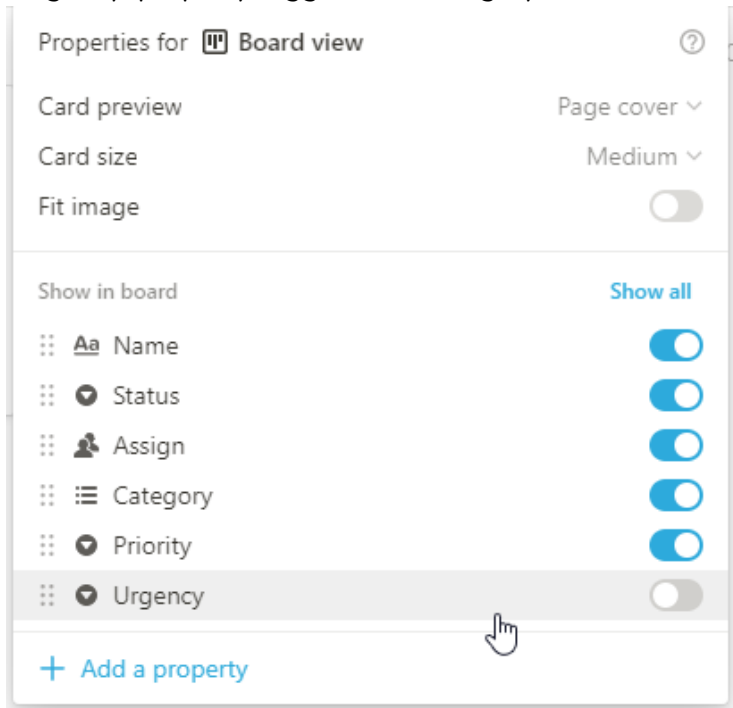


21. Click on 'Card Size'. Select 'Medium'.

22. Confirm that the 'Fit Image' toggle is gray.



23. Under 'Show in board' all the properties' toggles should be blue. Switch the 'Urgency' property toggle button to gray.



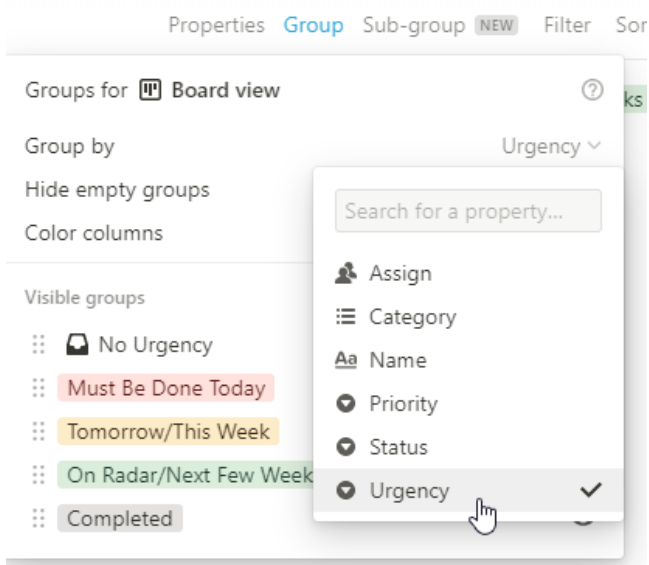
24. Go to 'Group'.

Test Task Management

[+ Add a view](#)

Properties **Group** [Su](#)

25. Click on 'Group By'. Select 'Urgency'.



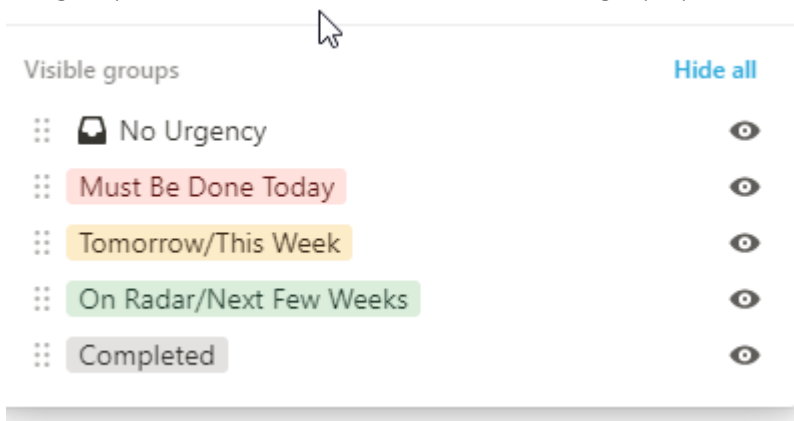
26. Leave 'Hide empty groups' toggled off.



27. Turn on 'Color columns' if you prefer a colorful workspace.



28. All groups should be visible and have a dark gray eye icon.



29. Click out of 'Group' to view the completed Task Management page.

Test Task Management

