

Technical Report

A OneNote template for knowledge management across a Change Laboratory project

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Abstract: This short report describes an approach to managing information and knowledge in a Change Laboratory project using a Microsoft OneNote template. The resource was developed for a project which took place at a federal university in the United Arab Emirates and involved teachers on a laptop-mediated preparatory English language course. The researcher-interventionist was concerned about how data generated during the project could be managed in terms of presentation, interaction with participants and storage and tracking as the intervention progressed. The solution was to use a Microsoft OneNote template to manage presentation of mirror data, provide the work surfaces for participants during the sessions, and also to serve as a record or repository of the Change Laboratory as it took place. The template proved to be a very useful tool and greatly facilitated this particular project. The author feels that the template would also be of use to other researcher-interventionists with access to the same technological tools.

Keywords: Knowledge management; Project management; Technological tools.

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1. Introduction

In 2019 I carried out a Change Laboratory as part of my PhD in e-Research and Technology Enhanced Learning at Lancaster University, entitled *A Change Laboratory: A collective approach to addressing issues in laptop-mediated English language classrooms*.



The project aimed to improve teaching and learning in a laptop-mediated English language course at a federal institution in the United Arab Emirates. The participants were eight English language teachers, with myself as insider researcher-interventionist. In the summer before I began the project, I spent precious holiday time mentally grappling with the challenges I was certain to face. All my reading emphasised that Change Labs generate vast amounts of data, data that needs to be analyzed and organized to provide mirror data for subsequent sessions. The sessions themselves had to be planned, organized and carried out. Logistically, participants needed to be assembled at common times, meeting rooms booked, resources sourced etc. Reading this far, it is plain that a Change Lab is a daunting task before you even start.

I needed something to tie the project together, a common resource I could use to plan, organize, run and record the sessions from start to finish. I needed something I could display during sessions, access online at all times, and edit or update easily and efficiently, plus a resource I could share with participants. The answer I came up with was a Microsoft OneNote workbook. I was familiar with the tool from my teaching practice — I already used OneNote to present and record my classes over the course of the semester. It can be used to present materials, edit the materials live, include handwritten notes via a Smartscreen, and provides a shareable resource. As an added benefit, many of the participants also used OneNote in a similar fashion for their own teaching, and I felt a familiar tool could help balance the less familiar theory and methodology as the Change Lab proceeded. OneNote would become the tool to facilitate each session — it would present the surfaces, the mirror data and act as a record of the work carried out. The literature had emphasized that the surfaces — the past, present and future ‘workspace’ — were a key part of the Change Lab process, but all examples I could find were of physical hard copy materials. By using OneNote I was replacing flip boards etc. with an inclusive electronic resource.

2. Creating the resource

The first step was to create the workbook. I created *sections* across the top for each meeting. This was to provide a clear, separate section for each session and for ease of navigation. Similarly, within each section created *pages*. Each page represented a different task, or tool, for that session. For example, I created a page for the surfaces, for that session’s mirror data, another with the second stimulus and a page for notes, a blank workspace if you will. Each page generally corresponded to a different resource that would be used during the session. There was of course flexibility to add more pages if needed as a session demanded. I also created a ‘schedule’ section. See Figure 1.



Figure 1: The blank OneNote workspace.

3. Using the resource in workshops

I will now share some examples of the OneNote template in actual use, demonstrating how the template was used as a presentation tool, as a workspace for live interaction, and as a record of progress and work as the intervention progressed. The template was uploaded to a shared drive that all participants had access to. In this case, this was an institutional drive but any cloud-based shareable drive would be suitable. Below in Figures 2 and 3 you can see mirror data being presented to the group. Here the tool is functioning as a means of one way presentation.

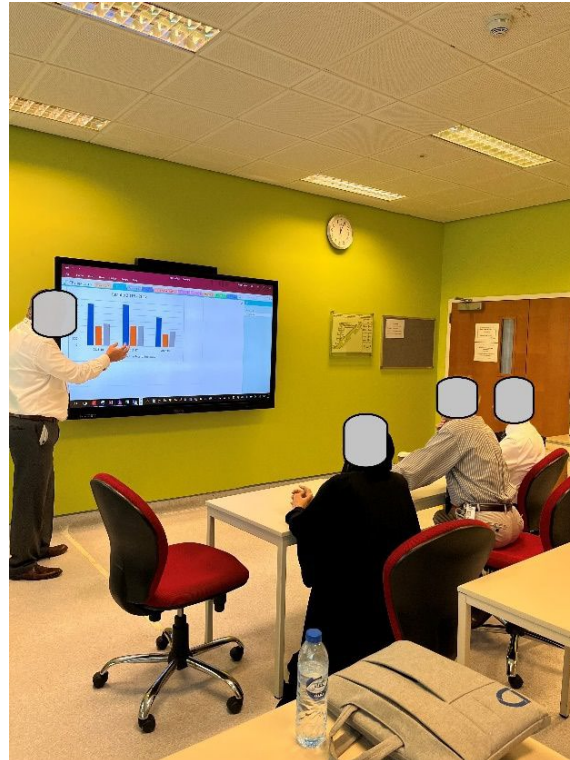


Figure 2: Researcher/interventionist presenting mirror data.

Figure 3 shows the mirror data in more detail.

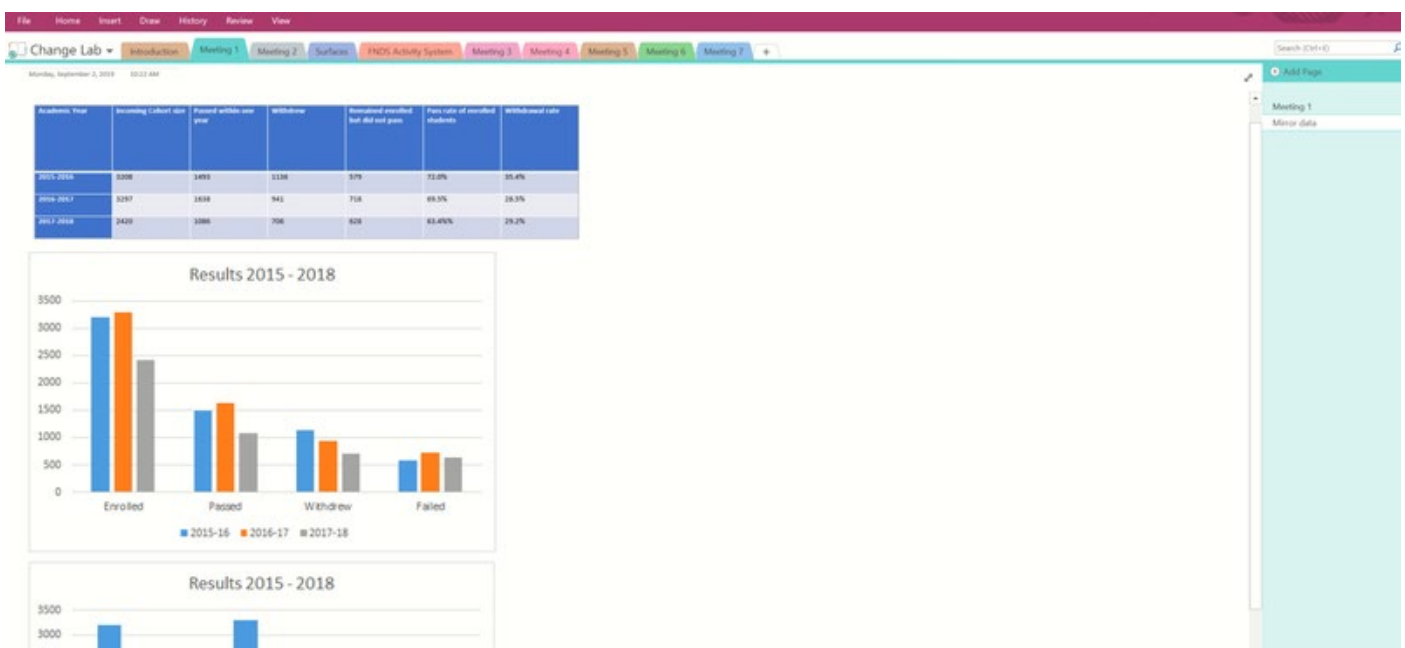


Figure 3: A snapshot of mirror data.

In Figure 4 you can see participants interacting 'live' with the template, using the draw tool for writing notes. It is important to note that the template was used in conjunction with interactive, or Smart, whiteboards. This was an important facet of the live functionality of the template — if interactive boards were not available participants would be able to contribute via



devices and text, but I feel this would lack the tactile attraction of 'live' written notes and the ability of participants to actively interact with the resource. In this sense, the template plus interactive board acted as a replacement for the traditional whiteboards and flipcharts of 'traditional' Change Laboratories.

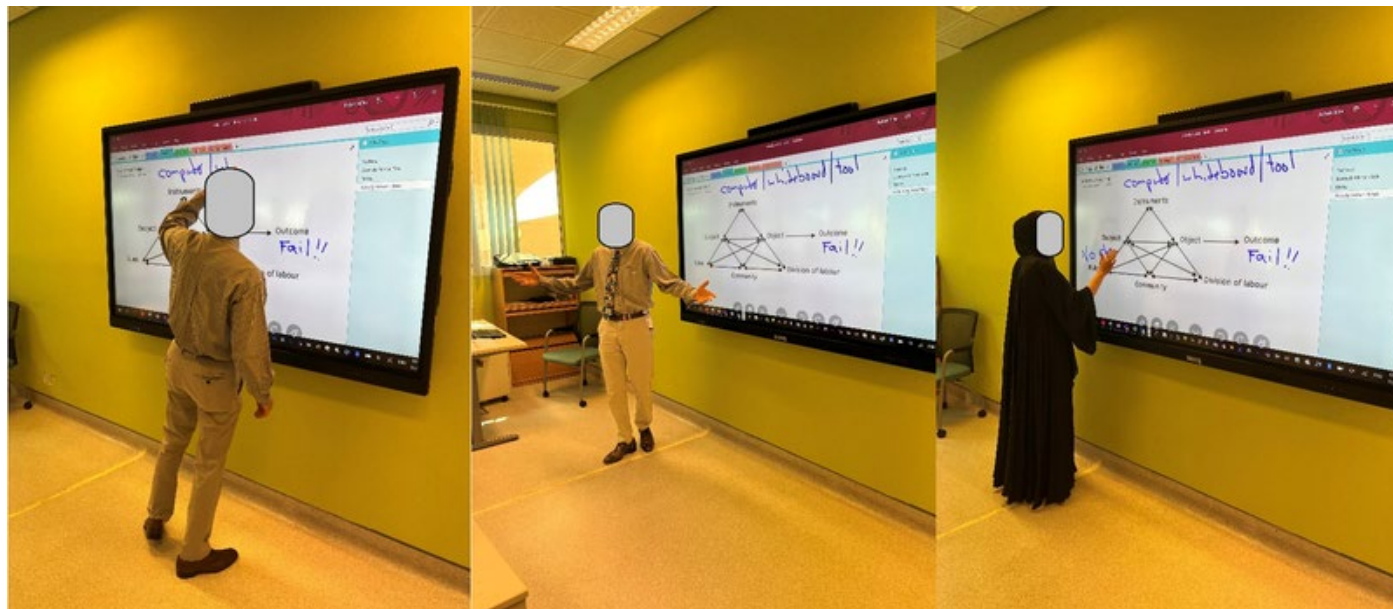


Figure 4: Participants interacting with the OneNote.

Participants often preferred to work with hard copies. These were at times provided by the research-interventionist, at other times the participants themselves printed them out. The resource allowed for participant choice. Handwritten notes were then transferred to the OneNote by the researcher-interventionist later as a record and in order to act as mirror data for subsequent sessions. Essentially, handwritten notes were 'transcribed' by the researcher-interventionist in order to provide a clear, editable record.

It can also be noted in Figure 5 that participants are also using personal devices during the session while using hard copies. The template is being accessed online while participants are simultaneously working on the hard copies provided in this instance by the researcher-interventionist. The template was displayed on the interactive whiteboard for all participants, but the use of personal devices allowed them to navigate to any area of the template, for example the mirror data from a previous session, independently of what the researcher-interventionist was displaying. This facilitated independence and agency for the participants.



Figure 5: Participants interacting with hard copy.

4. The resource as a live record

As well as a presentation tool and interactive workspace, the template also acted as a live, editable record of the sessions as the intervention progressed. As previously mentioned, notes taken in hard copy were transcribed by the research interventionist and added to the resource. For example, a hand-annotated activity system is shown in Figure 6, together with the finalized version added to the template post-session by the researcher-interventionist.

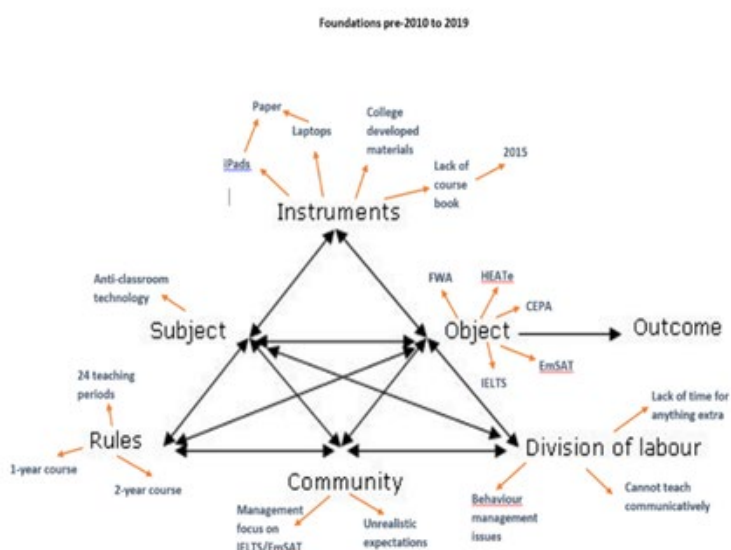
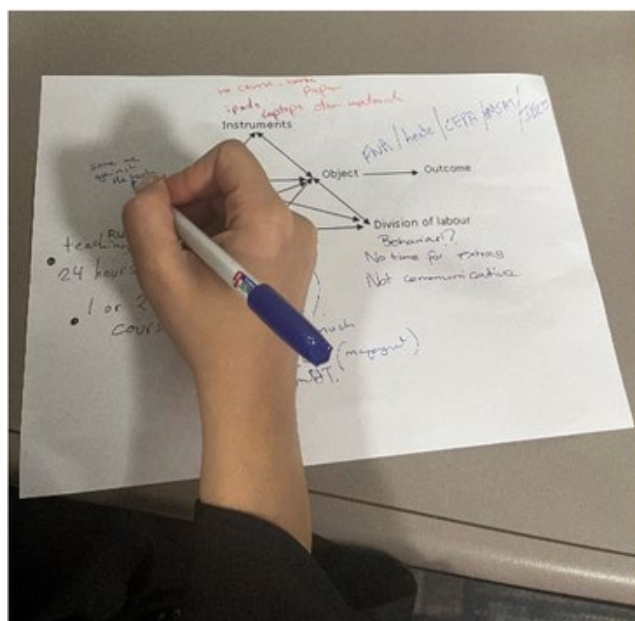


Figure 6: Example of handwritten notes and notes transcribed for OneNote record.

To reiterate, the OneNote serves as a presentation tool and workspace, but perhaps most importantly acts as a live record of the sessions as the Change Laboratory progresses, a record that can be returned to and navigated around at any stage of the intervention.

In Figure 7 we can see how the surfaces are used as a record, here after three sessions.

Figure 7: Change Lab OneNote after three sessions.

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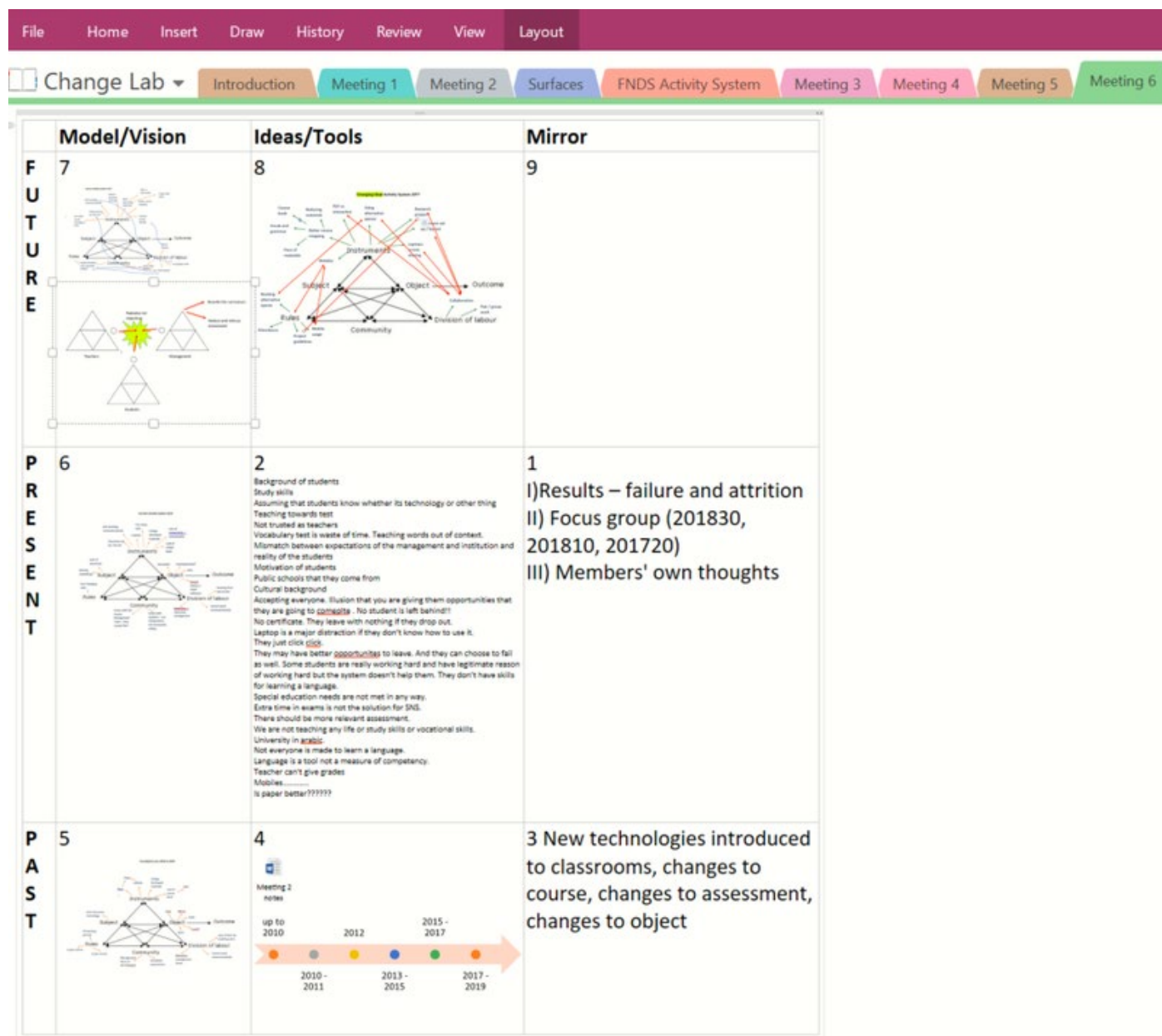


Figure 8: Change Lab OneNote after six sessions.

5. Reflections

The experience of using the OneNote template was positive for both myself as researcher-interventionist, and for the participants. In effect, the template became a tool to mediate the sessions and record the process of expansive learning over the course of the intervention. Both the researcher-interventionist and the participants were familiar with OneNote and interactive whiteboards, so minor technical issues related to hardware or connectivity were quickly solved, and no major challenges beyond these small hiccups occurred. At the same time, I would recommend users familiarise themselves with OneNote tools as far as possible before using the template for their own project. A number of effective training exercises and videos are easily found through any search engine. A Change Laboratory is a vast and potentially daunting



undertaking. I hope that with this template I am able to lessen that load, mediate the process and achieve a successful intended outcome for your projects.

You can read more about the project in which this resource was developed in the article *The Insider Change Laboratory in Practice* (Miles, 2022).

Downloadable resource

An editable version of the OneNote template can be found alongside this report on the *Bureau de Change Laboratory* website by clicking the *Supplement* link.

About the author

Rob Miles is an English language professional who has worked in the UK, Greece, Spain, Italy, and Brazil. Since 2005 he has been based in the United Arab Emirates. As well as teaching full-time he completed his PhD, 'A Change Laboratory: A collective approach to addressing issues in laptop-mediated English language classrooms' in 2021. Rob's main interests include activity theory, expansive learning, language acquisition, classroom technology, device deployment, professional development, educational leadership and writing assessment. Rob is an Alumni Member of the Centre for Technology Enhanced Learning at Lancaster University.

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