

CREATE **Advanced** 45 MIN · UPDATED 2026-09-30

Turn a project's OneNote notes into a formal charter and risk register.

Consolidate scattered meeting notes into a project charter, status report, and risk register with mitigations.

MICROSOFT 365

OneNote

Word

WORKS WITH

Claude

Copilot

Business Outcome

Formal project documentation that actually reflects what was discussed, produced without a dedicated write-up session.

Workflow Steps

Step 1: Make sure the notebook is reasonably complete

OneNote

Scan back through the notebook's meeting sections and check that the major decisions, scope discussions, and risks raised over the project's life are actually captured somewhere — Copilot can only draft from what's written down, so a notebook with gaps produces a charter and risk register with the same gaps, silently.

Step 2: Ask for the charter, status, and risk register together

[Copilot](#)[Claude](#)

Doing all three from the same notebook in one pass keeps them consistent with each other, rather than drafting separately and reconciling later.

PROMPT

Using the notes in this project notebook, draft: a one-page project charter (objective, scope, stakeholders), a current status summary, and a risk register listing each identified risk with a proposed mitigation.

Step 3: Validate the risk register especially closely

[Word](#)

Risks mentioned in passing during a meeting aren't the same as risks the team has actually assessed – confirm each one is real before it goes in a formal register.

Step 4: Share drafts with the project team before finalizing

[Word](#)

The notebook captures what was said, not necessarily what everyone meant – a quick team review catches misinterpretations early.

✓ Check the work

- Confirm every listed risk was actually discussed as a real risk, not a passing comment.
- Check the charter's scope and objective against what stakeholders actually agreed to.
- Have at least one other project team member review before treating any of these as final.

Expected Outcome

A project charter, current status report, and risk register with mitigations, all sourced from the project's OneNote notebook.

Want help rolling this out across your team? [Go to Liminals.Tech](#) ■