

Notion for Team Wikis & SOPs — Workbook

This workbook turns the course into a build. Each section maps to one module and walks you from a blank Notion workspace to a working wiki, SOP library, onboarding hub, and maintenance system. Complete the exercises in order, fill in the worksheets with your own team's details, and use the checklists to confirm each piece is done before moving on.

Notion Foundations for Documentation

Set up a clean workspace skeleton and decide what belongs in pages versus databases before writing any content.

Exercise: Master the slash menu and block basics

Open a scratch page in Notion. Using only the slash menu, insert each block type listed in the prompts. Time yourself; the goal is to build all of them in under five minutes without using the toolbar.

- Insert a heading 2, a bulleted list, a to-do list, and a callout using the slash key

- Drag one block to reorder it, then nest a bullet under another

- Turn a paragraph into a toggle, then into a quote, to feel how blocks convert

- Create a sub-page inside the scratch page and note how the sidebar updates

Worksheet: Map your top-level structure

List the functions of your team that need documentation. Keep the top level to seven or fewer sections. For each, note whether its content is mostly unique pages or repeating items that need a database.

Section 1 name and page vs database

Section 2 name and page vs database

Section 3 name and page vs database

Section 4 name and page vs database

Section 5 name and page vs database

Home page title and one-line welcome callout

Checklist: Workspace skeleton is ready

- Home page created and titled clearly, for example Company HQ
- Four top-level sections added: Wiki, SOPs, Onboarding, Team
- Naming convention agreed: verbs for SOPs, nouns for reference

- Home page pinned to the top of the sidebar
- Table of contents on the home page links to each section

Building the Team Wiki

Convert your Wiki section into a native wiki with owners and verification, then add views and tags so content is findable.

Exercise: Turn a page into a wiki and verify it

Open your Wiki section page and use Turn into wiki. Assign an owner to each existing sub-page and verify the ones that are currently accurate. Then build a view that surfaces what still needs attention.

- Assign an Owner to every wiki sub-page
-
- Verify two pages you know are accurate and observe the badge
-
- Create a view filtered to Verification is empty and rename it Needs Review
-
- Decide a verification cadence: how many days for stable vs fast-changing pages

Worksheet: Define your views and tag glossary

Plan the database views each audience needs and write a short, deliberate tag list. Keep tags few and canonical to avoid duplicates.

View 1 name, layout, and filter

View 2 name, layout, and filter

View 3 name, layout, and filter

Tag glossary: five to ten canonical tags with one-line meanings

Home page embed: which view and filter will appear on the front door

Checklist: Wiki is navigable and trustworthy

- Wiki feature enabled with Owner and Verification on sub-pages
- At least one alternate view created, such as a board grouped by Owner
- Tags property added and glossary documented on the home page
- Quick Find shortcut shared with the team
- Related pages cross-linked with at sign mentions to avoid dead ends

Writing SOPs People Follow

Build an SOP database with a template button, a status workflow, owners, and one-click buttons so procedures are consistent and easy to create.

Exercise: Write your first SOP from the standard template

Pick one recurring task your team does and document it using the seven standard sections. Hand the draft to someone who has never done the task and have them attempt it using only your document. Note every place they got stuck.

- Write the Purpose in one sentence and define the Scope
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- List Prerequisites: access, tools, and information needed first
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- Write action-first steps, one action per step, naming exact tools and fields

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- Record where your test reader got stuck and fix those steps
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Worksheet: Design your SOP database

Specify the properties and workflow for your SOP Library before building it, so the template button enforces the right structure.

Database name

Status options in order, for example Draft, In Review, Published, Needs Update

Owner and Reviewer property names

Department or category select options

Template name and the seven section headings it contains

Button actions: what your Add SOP and Mark Reviewed buttons will do

Checklist: SOP system is in place

- SOP Library database created with Status, Owner, Department, Last Reviewed
- Standard SOP template saved with all seven sections
- Status workflow visible in a board view grouped by status
- Owner assigned to every SOP, with Reviewer set for sensitive procedures
- Add SOP and Mark Reviewed buttons working with one click

Onboarding Hubs, Permissions, and Maintenance

Build a role-based onboarding hub, lock down access with teamspaces and permissions, and stand up a review cadence so nothing goes stale.

Exercise: Build a role-based onboarding hub

Create an Onboarding Tasks database and populate it for one role. Build a per-role view and a board grouped by week, then link each task to the relevant SOP or wiki page.

- Add tasks with Role, Week, Category, and Done properties

- Create a board view grouped by Week and a filtered view for one role

- Link at least three tasks to existing SOPs or wiki pages with the at sign

- Save the whole hub as a template that can be duplicated per new hire

Worksheet: Permissions and review cadence plan

Decide who can see and edit what, then define the maintenance rhythm that will keep the system current. Open teamspaces and their audience

Closed teamspaces and who belongs to each

Default access level for published content, for example Can view

Review threshold in days for the Needs Review dashboard

Owner review rhythm, for example monthly clear-the-overdue pass

Permissions audit owner and frequency, for example quarterly

Checklist: Hub, access, and maintenance are live

- Onboarding hub built with per-role and per-week views
- Onboarding template duplicable for each new hire
- Teamspaces configured: open for shared docs, closed for sensitive areas
- Published content set to Can view, edit reserved for owners
- Last Reviewed and days-since formula added to documentation databases
- Needs Review dashboard grouped by Owner and embedded on the home page
- Quarterly permissions audit scheduled

Your Action Plan

1. Create the workspace skeleton: home page plus Wiki, SOPs, Onboarding, and Team sections
2. Agree naming conventions: verbs for SOPs, nouns for reference pages
3. Turn the Wiki section into a native wiki and assign owners and verification
4. Build the SOP Library database with a Standard SOP template button and status workflow
5. Document your three highest-risk recurring tasks as SOPs and test each with a fresh reader
6. Build the onboarding hub as a duplicable, role-based task database linked to your SOPs
7. Configure teamspaces and set published content to Can view, edit for owners only
8. Add a Last Reviewed date and a days-since formula to every documentation database
9. Create and embed a Needs Review dashboard grouped by Owner on the home page
10. Schedule a monthly owner review pass and a quarterly permissions audit

