

MICROSOFT ONENOTE

*Effectively Noting, Organizing, and
Leveraging Information*



KNACK TRAINING

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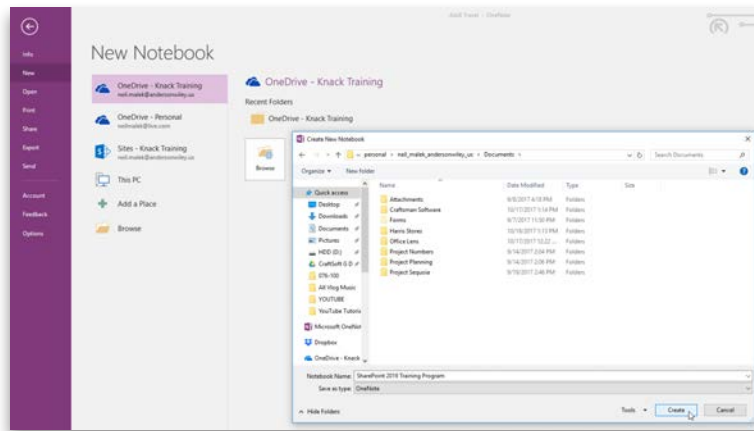
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ORGANIZING CONTENT

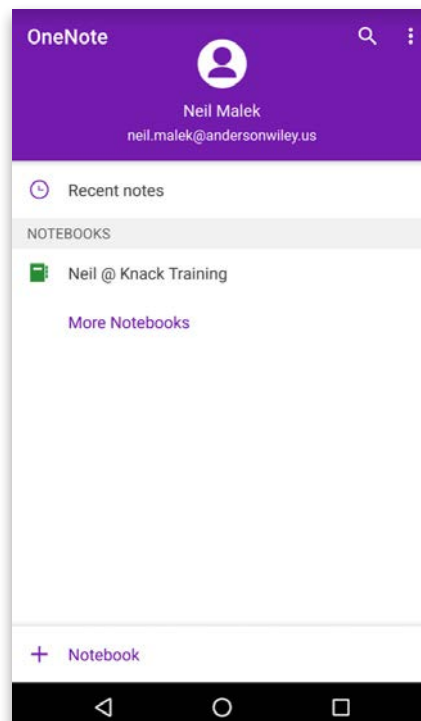
OneNote works just like a digital three-ring binder (or many three-ring binders). Understanding the metaphor will make everything else much easier to work with.

NOTEBOOKS

Open **OneNote** or **OneNote 2016** on any device, and choose to create a **New Notebook**. On a Windows computer, you'll see **File > New > New Notebook** as an option:



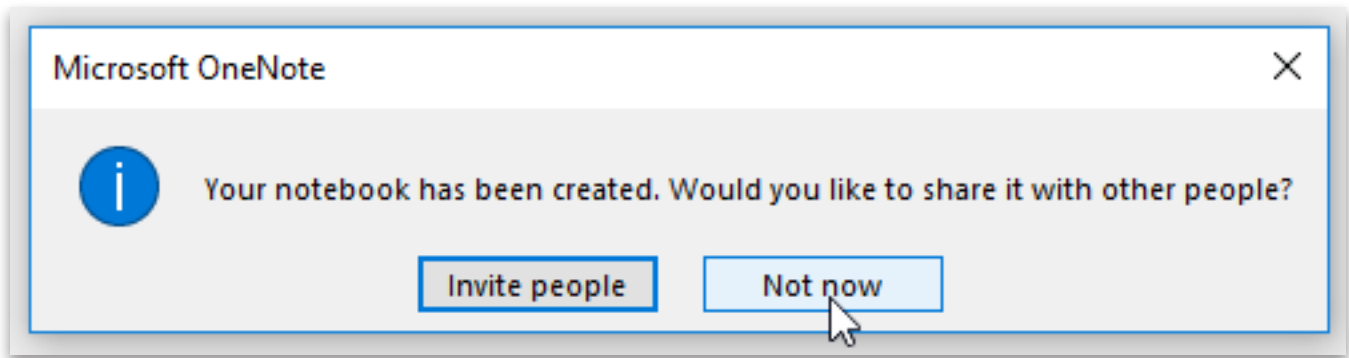
On an Android phone, a button at the bottom of the screen gives you **[+] Notebook** to create a new notebook:



Your first choice, besides the notebook's name, is the save location. If you have a company **OneDrive for Business** account, you should see that listed. If you don't, you should get a new **live.com** or **outlook.com** email address from Microsoft. You'll see your **OneDrive Personal** account available.

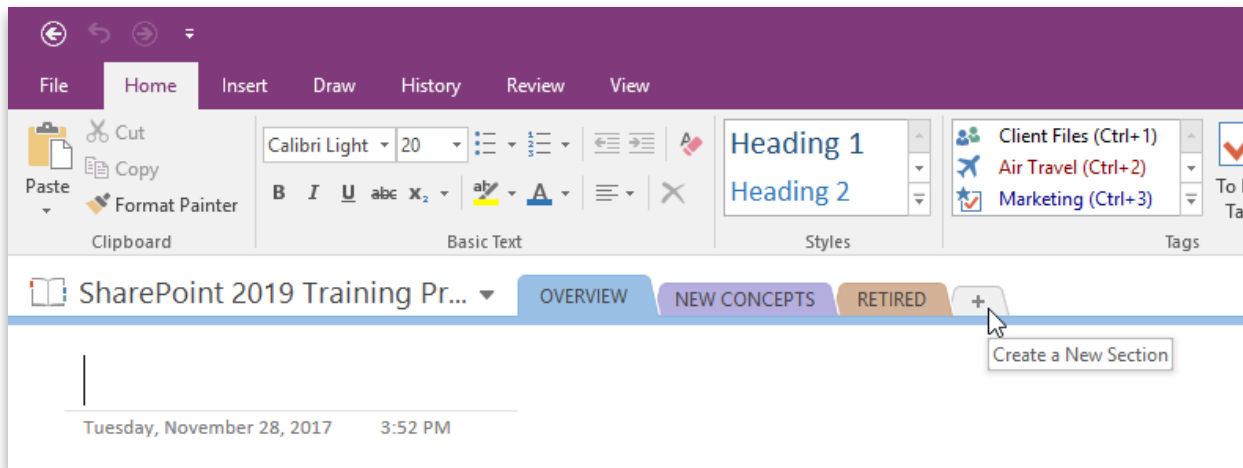
Saving to either OneDrive for Business or OneDrive Personal makes it possible to access your notebook from any device, synced to the cloud. This is a vastly superior option to saving to your PC.

Upon creating your new notebook, OneNote will ask you if you want to share it with others at your company:

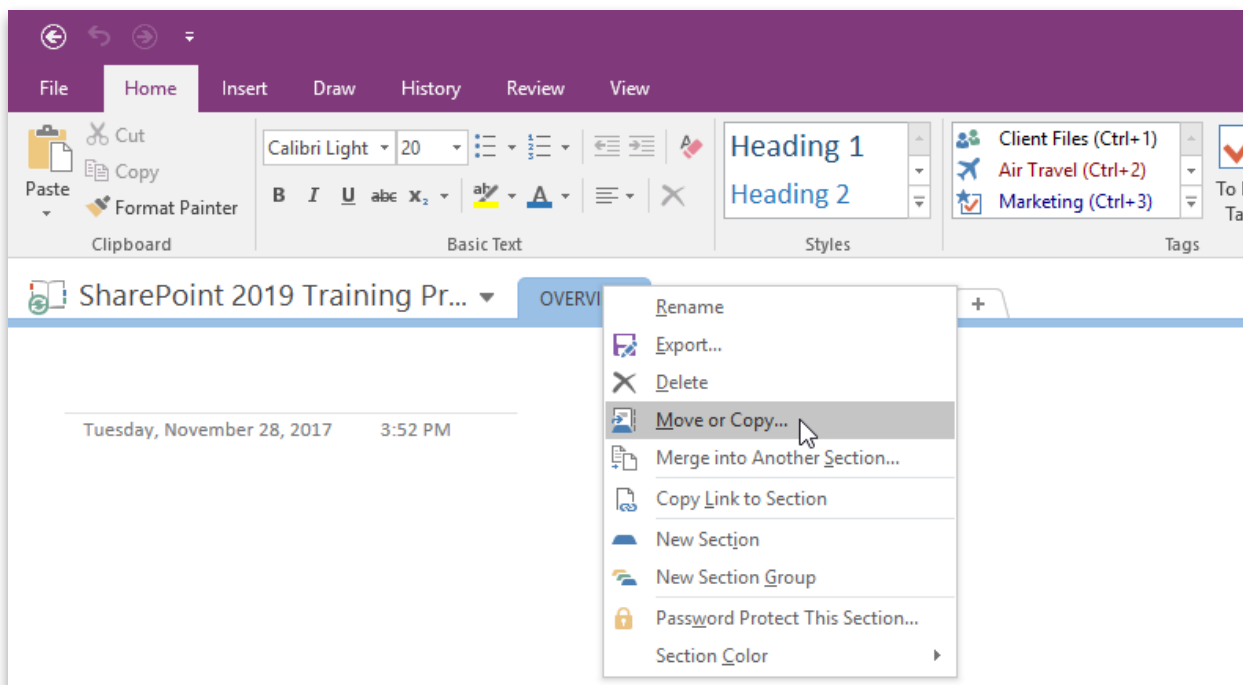


SECTIONS

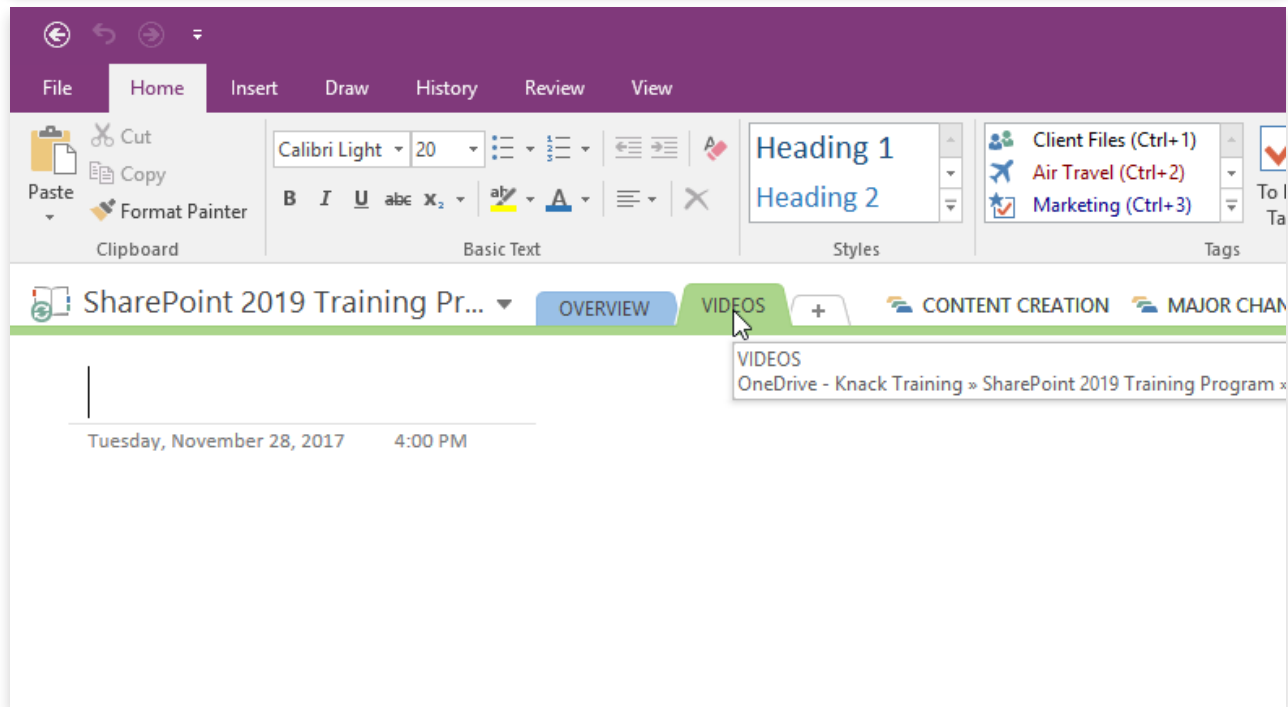
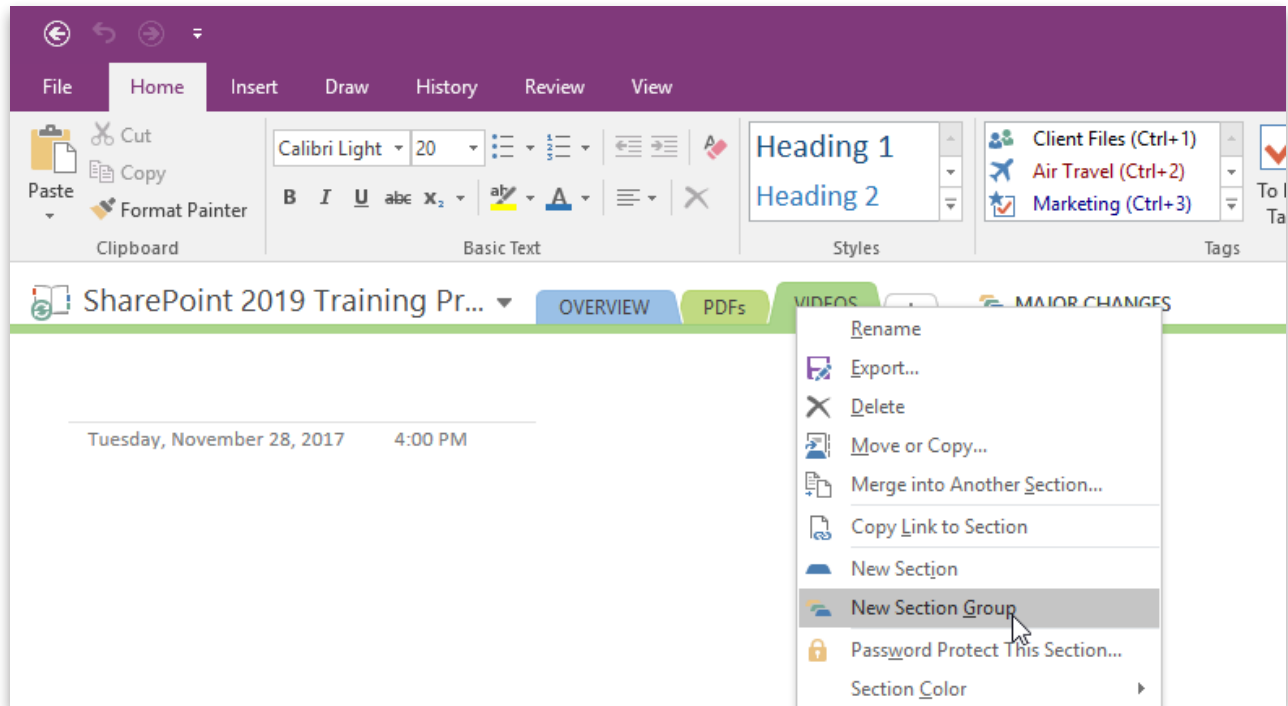
If creating a new notebook is like buying a new three-ring binder from Staples, creating sections is like buying the colored tab dividers to break it up into logical groups. Click the **[+]** button at the top of the screen to create new tabs, and **double-click** any tab to rename it:



You can **click-and-drag** a divider along the top of the screen to rearrange your tabs. By **right-clicking** the tab, you can see that you can move the sections between notebooks, as well.

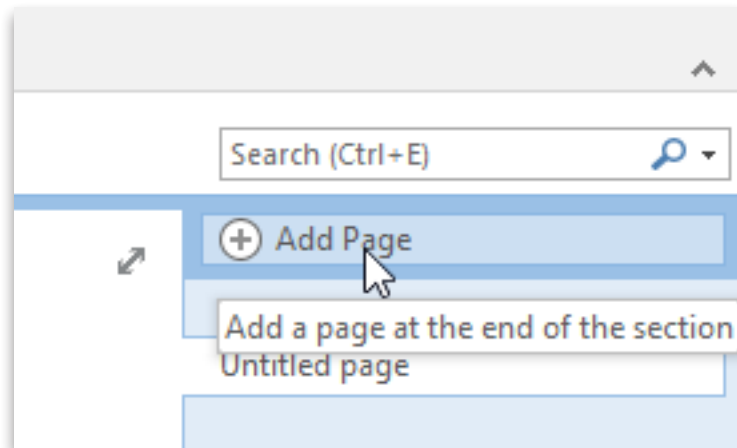


Right-click the tabs at the top of the screen in order to create **Section Groups**, which will let you more clearly organize subdivisions of your information into logical groups:

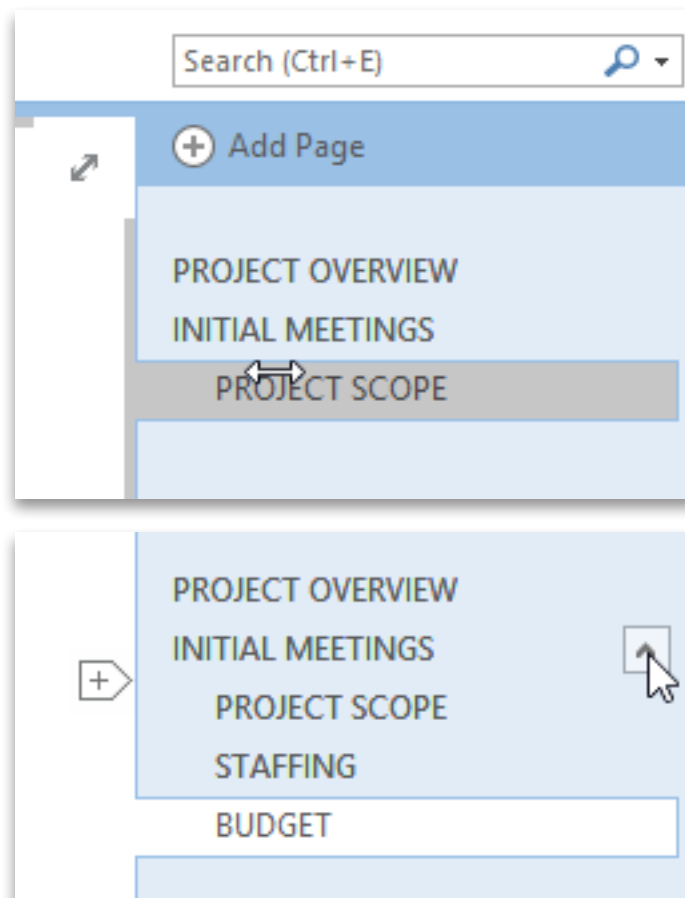


PAGES

Of course, if the Notebook is a three-ring binder, and sections are colored tab dividers, pages are... *pieces of paper* in this metaphor. Create a new page by clicking the **[+] Add Page** button, or by using the keyboard shortcut **[CTRL] + [N]**.

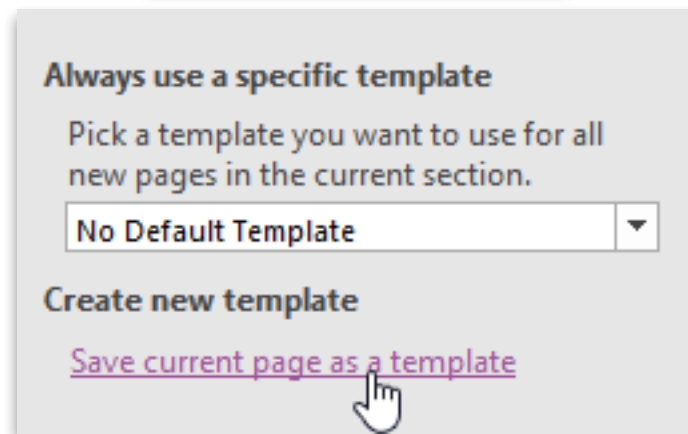
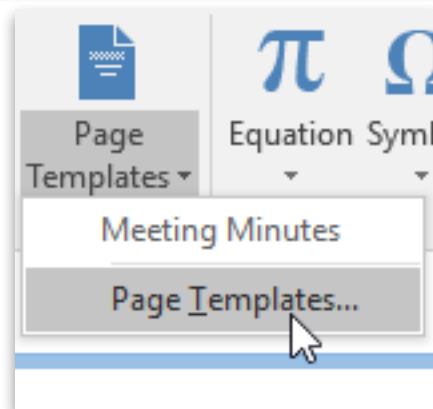
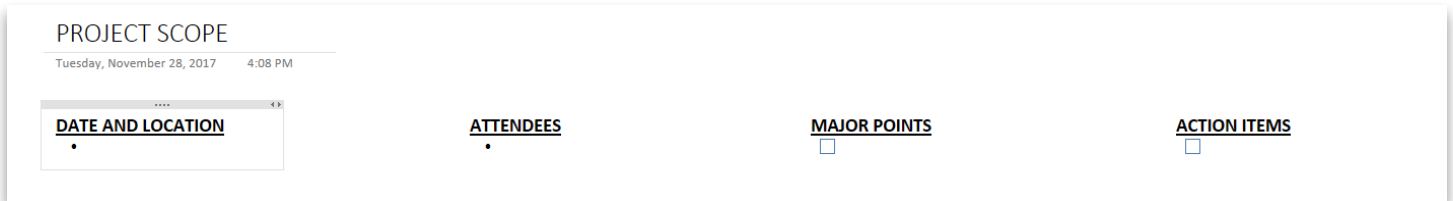


By **clicking-and-dragging** any page underneath another page, you create a **sub-page**, which is collapsible:



The pages you create are essentially infinite sheets of paper - simply scroll down or to the right to get additional space.

If you build the framework for a standard page type (like meeting minutes, or travel itineraries), you can click **Insert > Page Templates... > Save current page as a template**. Then, simply insert a page using that template for future notebooks.

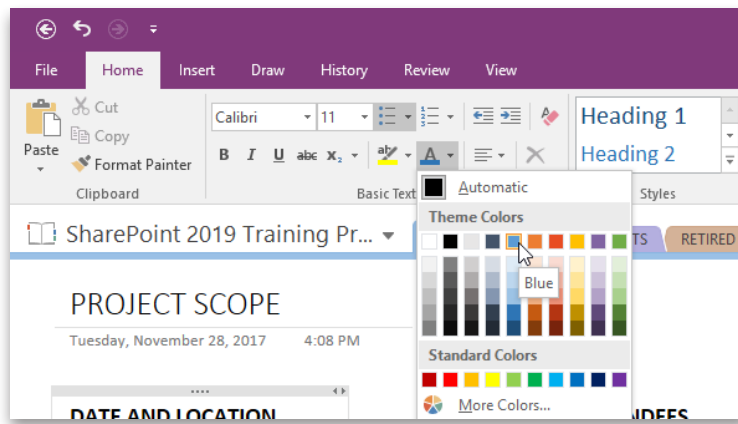


NOTE-TAKING

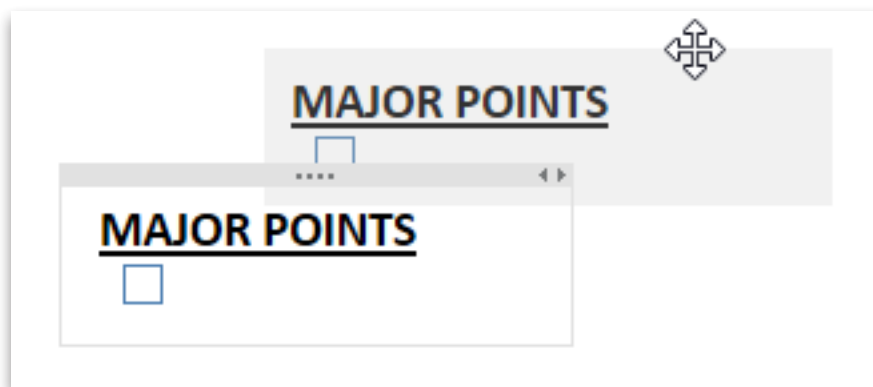
Because OneNote is running on your laptop, tablet, and/or phone, you can take many different kinds of notes in the same notebook.

TEXT NOTES

The most essential part about taking text notes - typing and formatting - is very simple. Click any area of your page, and begin typing in that location. Then, highlight the text and use your standard **Font** group of the **Home Tab** to change the standard font settings:



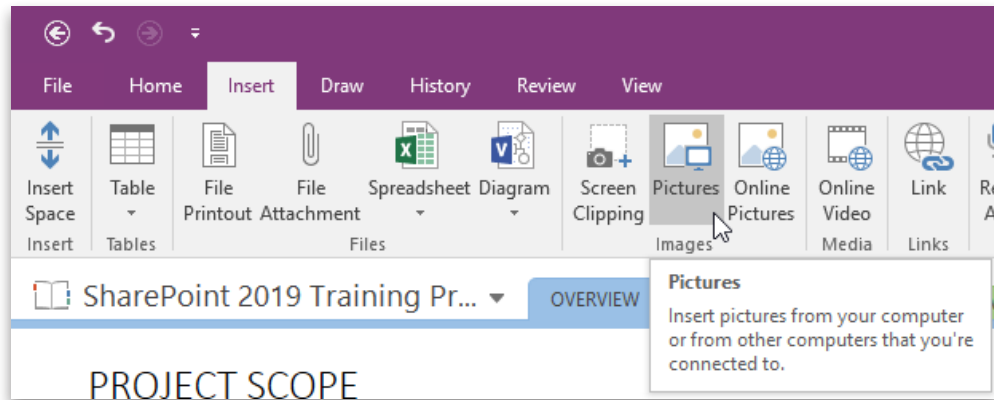
The most interesting thing about text notes to me is the ability to treat each chunk of text as a 'text box', then **click-and-drag** that box around the page:



If you're looking for additional style functionality, download and install the OneTastic plug-in for OneNote, found at <http://getonetastic.com> - then you can save custom Styles and reuse them across notebooks.

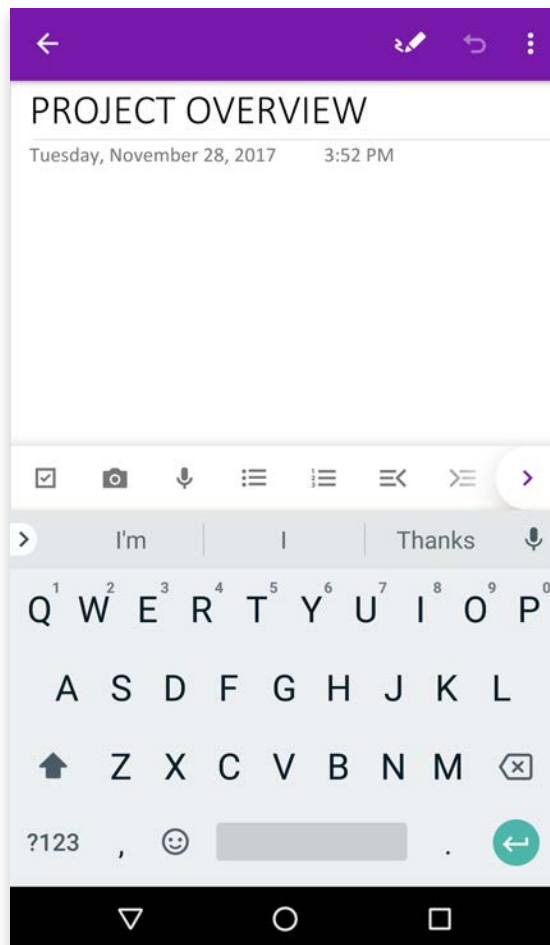
IMAGE NOTES

Inserting images that you have on your computer is very easy. Click **Insert Tab > Pictures**, then choose the appropriate picture:

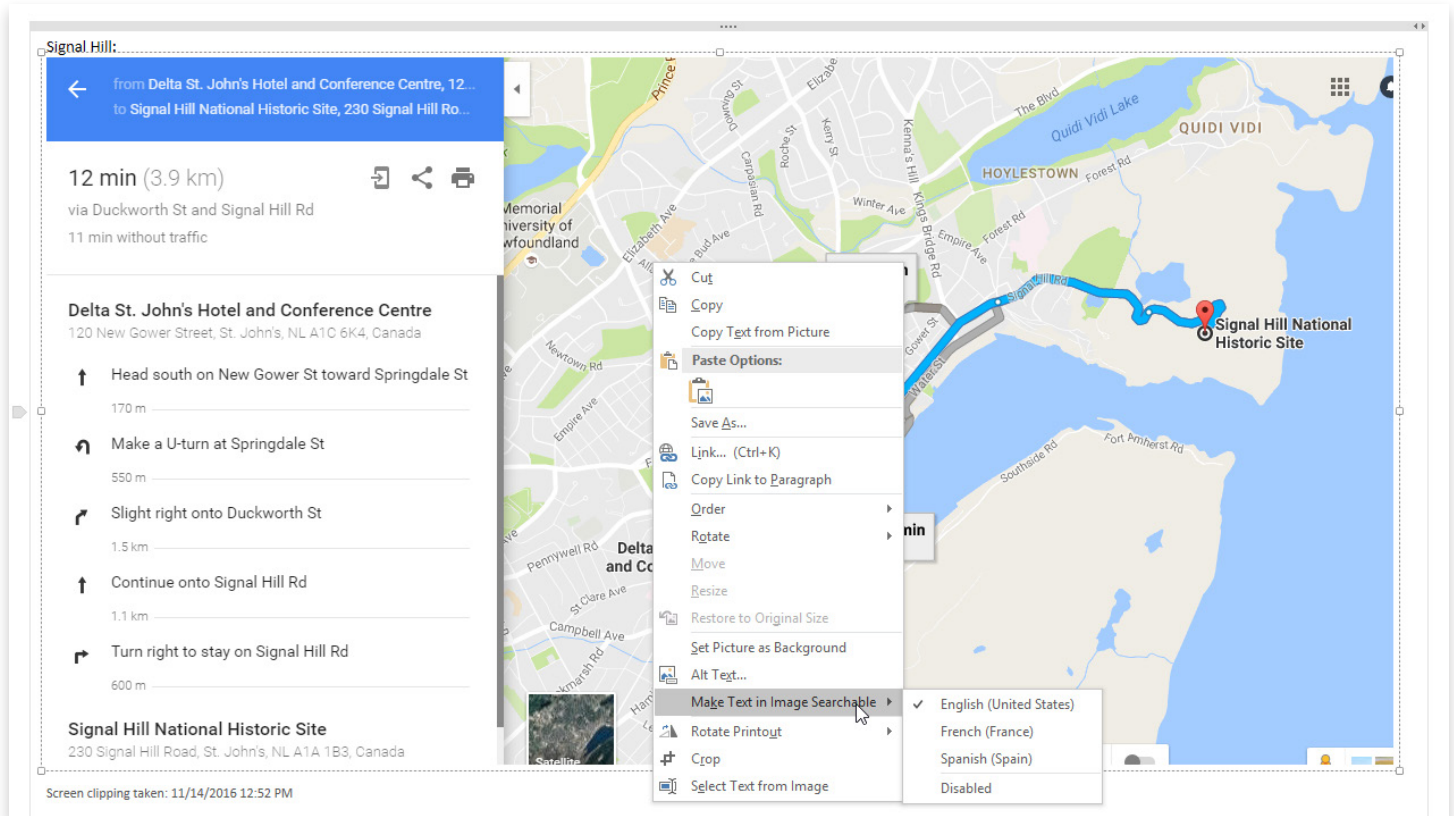


Alternatively, you can get images from **Insert Tab > Screen Clipping**.

Or, open OneNote on your phone or tablet to access a page in your notes, and click the **Camera icon**:

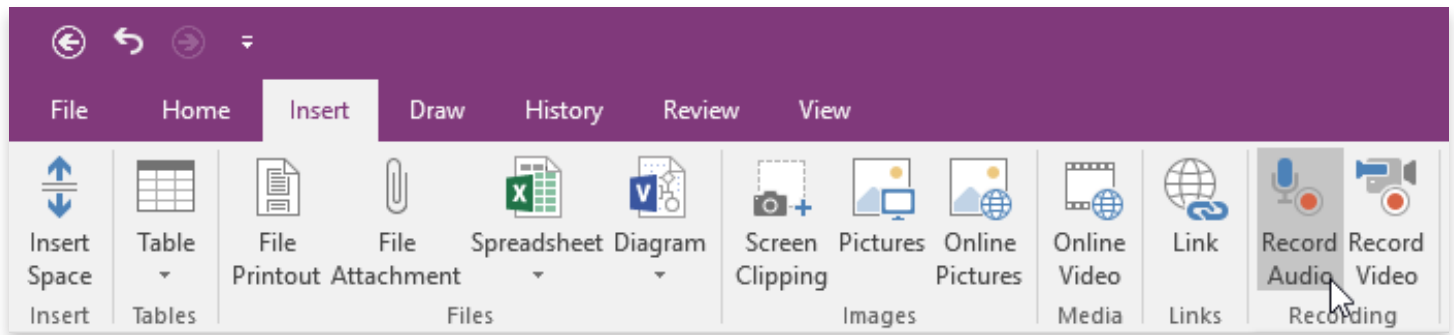


A tool I find myself using all the time is to **right-click any image** and choose **Make text in image searchable** (you only have to do this once). This uses OCR (Optical Character Recognition) to make text from screenshots, business cards, and scanned documents perfectly searchable and select-able.

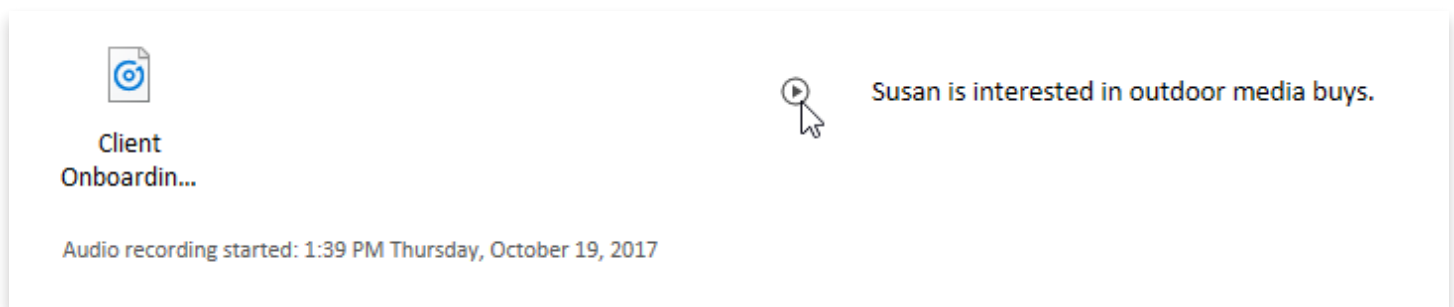


AUDIO NOTES

The audio recorder built into OneNote can be used for meeting minutes or on-the-road self-memos. Simply press the microphone button, and a recording will be made on whatever page you're on:



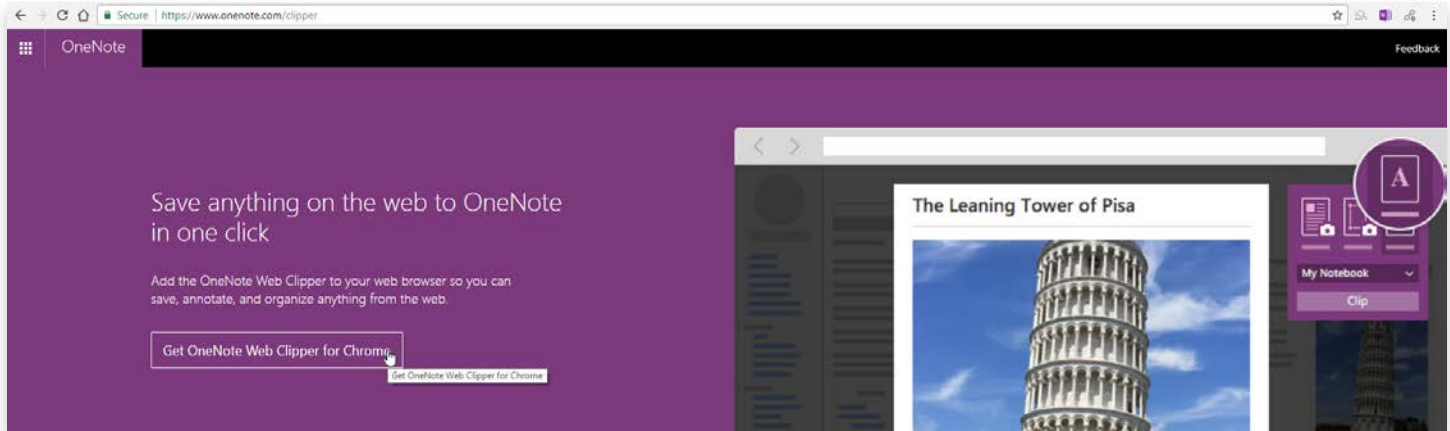
In addition, if you take text notes on OneNote for Windows while the audio recording is ongoing, markers are placed on your audio file so that the text notes are synced with the right segment of the audio.



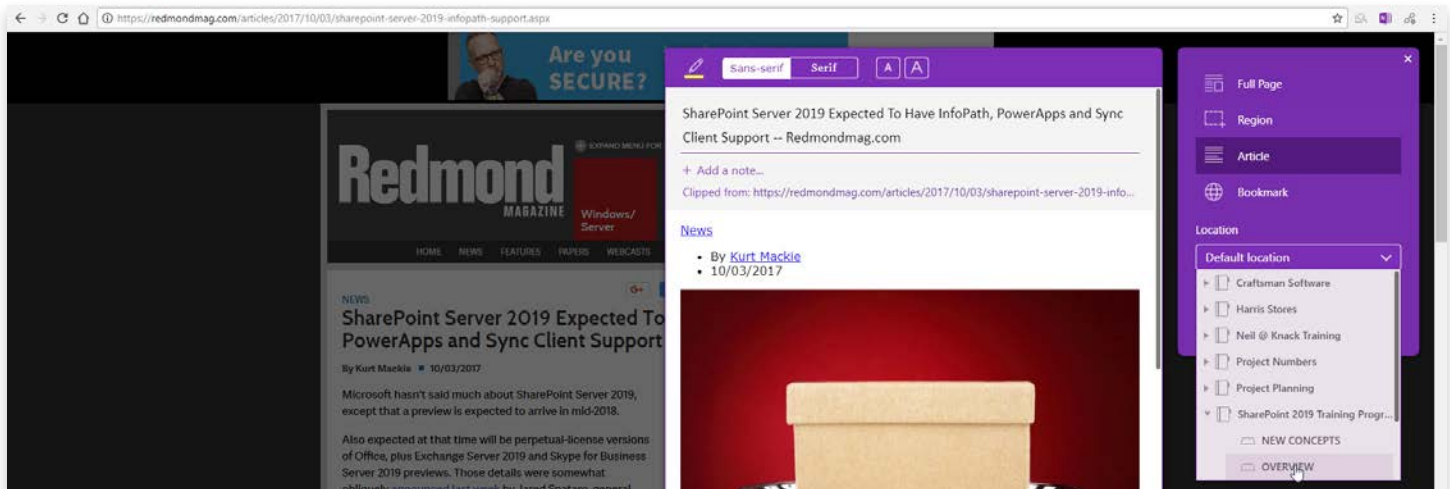
If you want to use speech-to-text, you'll have to use Cortana on Windows, Siri on iOS, or the Google Assistant on Android to say *'make a note in OneNote'* - there is no speech-to-text built into OneNote at the time of this writing.

CLIPPED NOTES

In Chrome, Firefox, Safari, and Edge, you can install an *extension* called the **OneNote Web Clipper**. Visit <http://onenote.com/clipper> in your browser of choice to get the appropriate link.



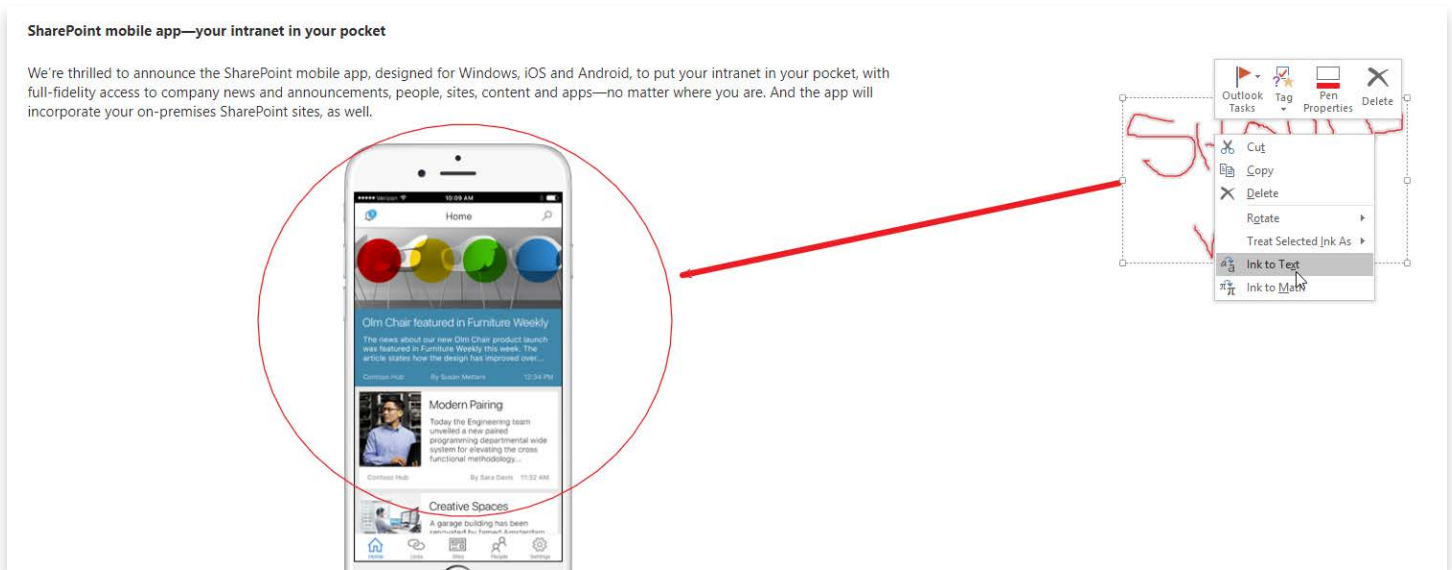
Now, log into your clipper with your Microsoft account, and any clipped web pages will be added to the notebook and section you choose.



HAND-DRAWN NOTES

If you're using a tablet like an iPad or Surface, OneNote is a very nice canvas for using your stylus. Simply switch to the **Draw Tab**, and create freehand notes as you like.

If you have reasonably good handwriting, select your handwritten note with the **Lasso Tool**, and choose **Ink to Text**.

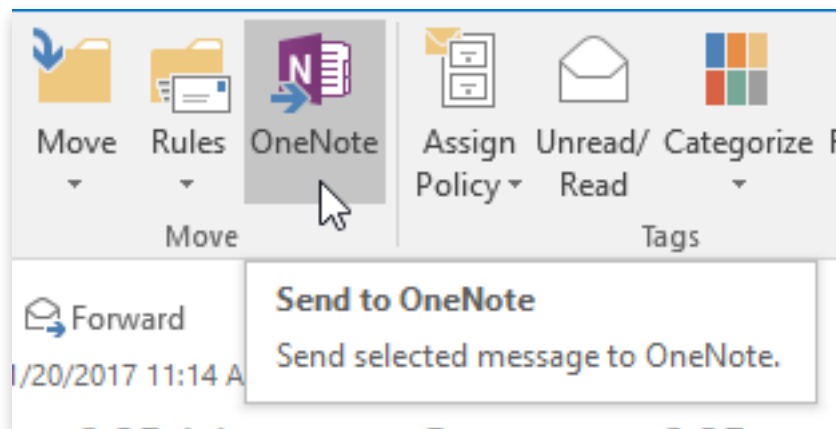


INTEGRATIONS

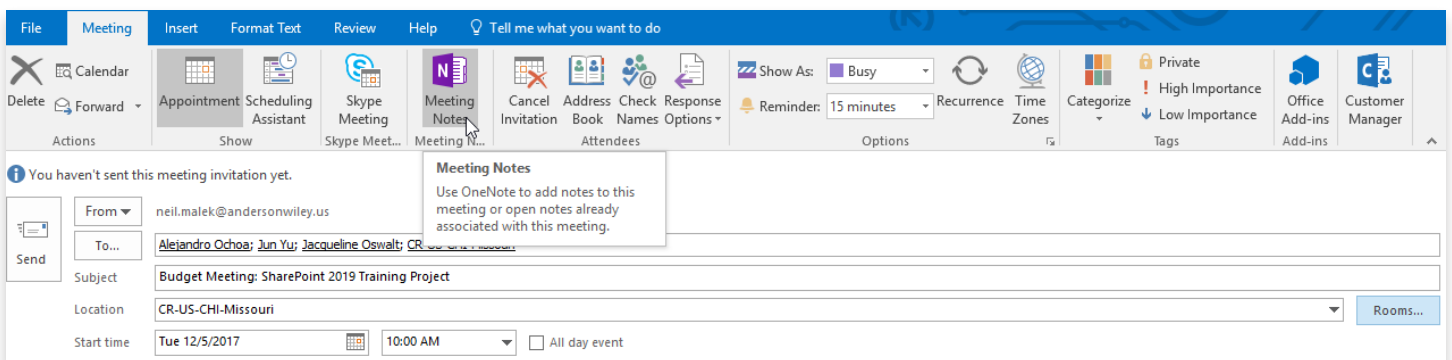
OneNote isn't about creating documents - it's a tool for aggregating, organizing, and reusing information. It lets you collaborate with coworkers, or make a more full-featured version of something you'd do in another program. Its integrations are the true source of its power.

OUTLOOK

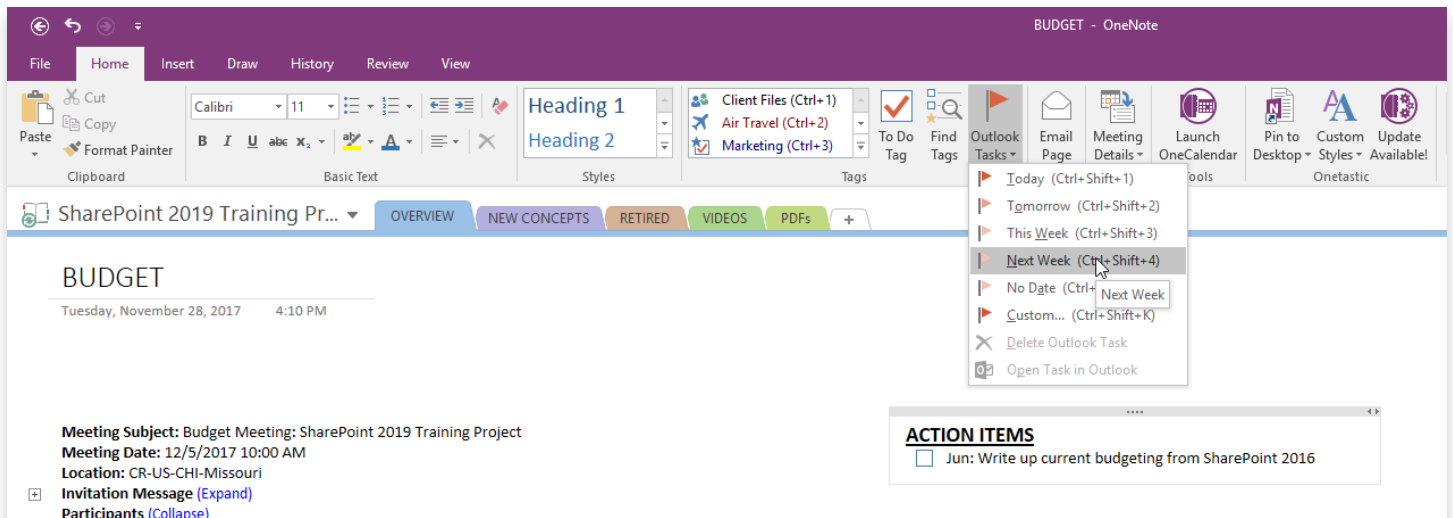
Each of the major facets of Outlook - email, calendar, contacts, and tasks - has a valuable integration with OneNote. First, install OneNote - a new set of buttons will be added to the Ribbon for connecting to OneNote. Next, when you receive an email with valuable information, **don't** save it into a folder. Instead use the **Send to OneNote** button to save the contents of that email into the relevant notebook.



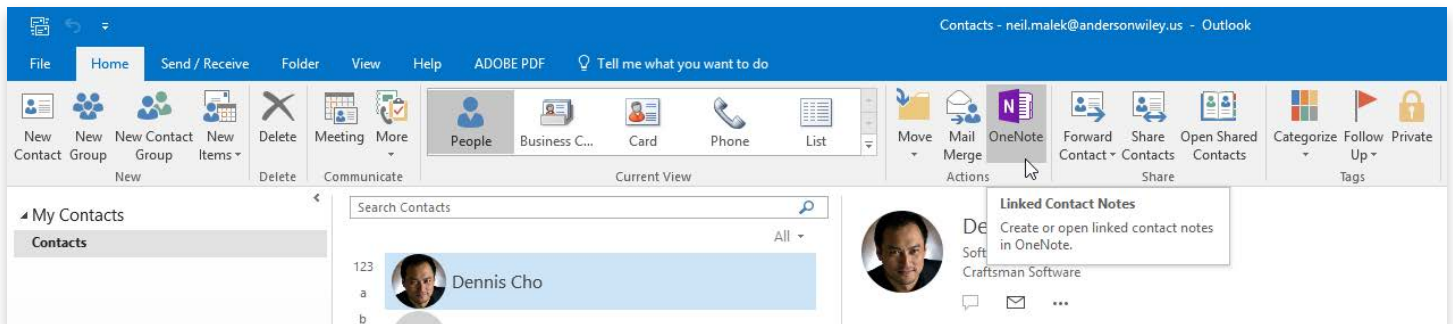
When you're scheduling a meeting, don't put the details of that meeting (and its minutes) into the generic box at the bottom of the meeting. Instead, click **Meeting Notes** to save those notes in OneNote, and share them with your coworkers.



When you're putting together Action Items for that meeting, put the thing to be done onto the page in OneNote, then click the button to assign **Outlook Tasks**. This will create a tie back to the original context within the task you create.

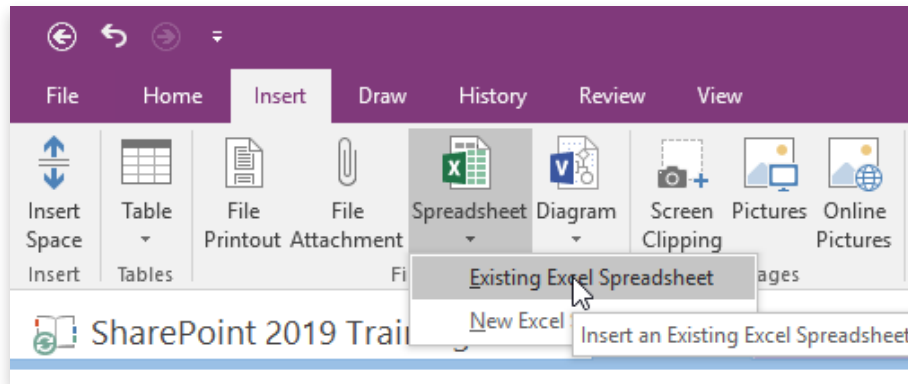


When your context with a contact grows to a certain extent, the open space of a **Linked Note** for that contact will be very valuable.

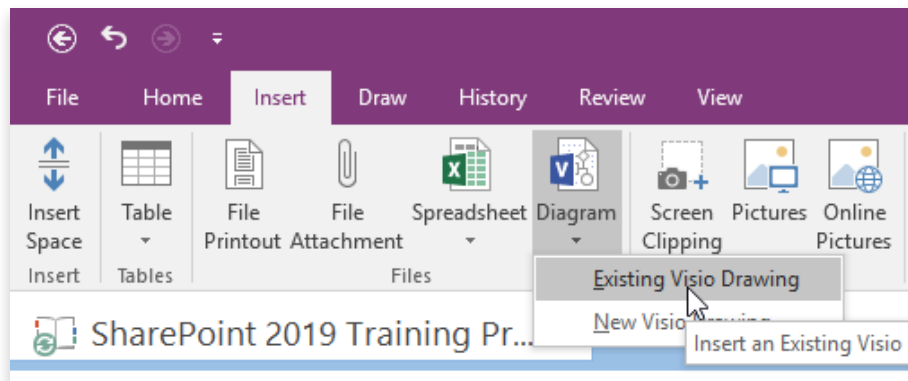


OTHER OFFICE APPS

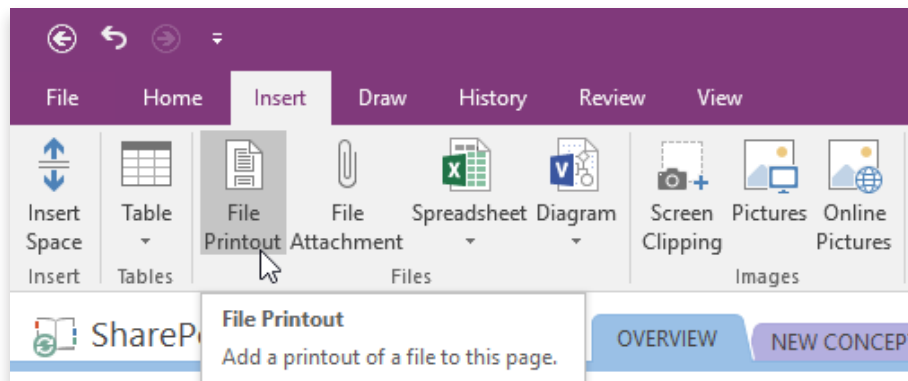
At any point, you can embed an Excel chart (or larger part of a spreadsheet) by using **Insert > Spreadsheet**:



If you have Visio installed, you can embed an organization chart, flowchart, or other diagram through **Insert > Diagram**:

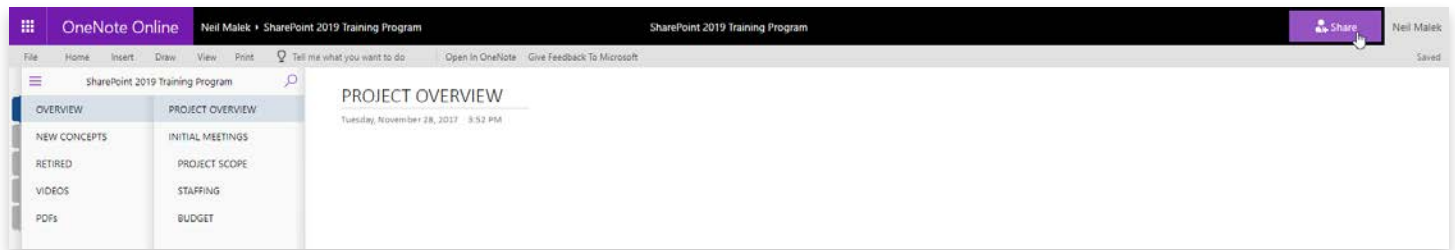


Additionally, you can add pages or slides from PDFs, Word Files, and PowerPoint presentations by **Insert > File Printout**:



ONEDRIVE & SHAREPOINT

OneNote Notebooks can be saved to both OneDrive and SharePoint. These two tools are then leveraged to let you **share** the notebook with your coworkers (or others):



Then, with the web link, you can edit a OneNote notebook through the browser.

OFFICE LENS

Office Lens is an app available for iOS and Android, that takes perfect scans of business cards, documents, PowerPoint slides, and more. Search for it on your phone's store app.

IFTTT, ZAPIER, & MICROSOFT FLOW

Once your OneNote Notebook is saved into OneDrive or SharePoint, it is accessible via IFTTT.com, Zapier.com, and Microsoft Flow:

