

Microsoft OneNote

Step

by

Step

Curtis Frye



PRACTICE FILES



Microsoft OneNote Step by Step

Curtis Frye

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For Virginia, my wife and love of my life.

Contents

	Introduction	xi
	Who this book is for	xi
	The <i>Step by Step</i> approach	xi
	Download the practice files	xii
	Ebook edition	xiii
	Get support and give feedback	xiii
	Errata and support	xiii
	We want to hear from you	xii
	Stay in touch	xii
Sidebar: Adapt exercise steps	xiv	

	Manage notebooks, sections, and pages	1
	Create and manage OneNote notebooks	2
	Create and manage notebook sections	7
	Create and manage notebook pages	15
	Skills review	21
	Practice tasks	22

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2

Create and format notes	25
Create, cut, and copy notes	26
Apply text formatting to notes	30
Create lists and outlines	36
Change paragraph formatting	42
Delete formatting and items	44
Skills review	45
Practice tasks	46

3

Work with your notes	49
Create quick notes	50
Add tables	53
Attach files and printouts	63
Add images and screen clippings	67
Create links to resources	73
Record audio and video notes	77
Insert time and date stamps	80
Add symbols and equations	81
Skills review	85
Practice tasks	86

4

Add ink and shapes to a notebook	91
Add notes by using ink	92
Select, view, and erase ink	96
Convert ink to text and mathematical expressions	99
Create and format shapes	102
Skills review	109
Practice tasks	110

5

Review and password-protect notebook text	113
Check spelling	114
Set AutoCorrect options	120
Translate and research text.....	125
Password-protect sections.....	130
Skills review.....	135
Practice tasks	136

6

Manage views, windows, and page versions	139
Manage notebook views and links.....	140
Extend your view by zooming and adding windows	145
Control page setup.....	148
Review notes by author and read status.....	154
Manage page versions and history	156
Skills review.....	158
Practice tasks	159

7

Organize notes by using tags and categories	161
Add and remove tags.....	162
Create and modify tags.....	168
Search by tag	171
Summarize tagged notes	175
Skills review.....	177
Practice tasks	178

8

Print and share notebooks and pages	181
Preview and print notebook content	182
Export pages, sections, and notebooks	186
Send pages to colleagues	189
Share notebooks by using OneDrive	192
Share notebooks by using SharePoint	198
Skills review	203
Practice tasks	204

9

Use OneNote with Outlook and Excel	207
Define Outlook tasks and display meeting details in OneNote	208
Insert Excel spreadsheets on notebook pages	213
Manage your Microsoft account, Office 365 subscription, and app settings	218
Skills review	225
Practice tasks	226

10

Manage OneNote options and the interface	229
Set OneNote app options	230
Customize the Quick Access Toolbar	236
Customize the ribbon	240
Skills review	247
Practice tasks	248

11

Enhance OneNote by using the Onetastic add-in	251
Download and install the Onetastic add-in.....	252
Manage notebooks by using OneCalendar.....	255
Manage pages and styles by using Onetastic.....	264
Manage content, images, and tables by using Onetastic	268
Skills review.....	272
Sidebar: Onetastic macros in OneNote.....	273
Practice tasks	274
Keyboard shortcuts.....	277
Index.....	289
About the author.....	303



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Introduction



Welcome! This *Step by Step* book has been designed so you can read it from the beginning to learn about Microsoft OneNote and then build your skills as you learn to perform increasingly specialized procedures. Or, if you prefer, you can jump in wherever you need ready guidance for performing tasks. The how-to steps are delivered crisply and concisely—just the facts. You'll also find informative, full-color graphics that support the instructional content.

Who this book is for

Microsoft OneNote Step by Step is designed for use as a learning and reference resource by home and business users of Microsoft Office apps who want to use OneNote to take and organize project notes; add images, shapes, and handwriting to notes; share notes with friends and colleagues; and embed Microsoft Excel spreadsheets in notes to manage data and create useful visualizations. The content of the book is designed to be useful for people who have previously used earlier versions of OneNote and for people who are discovering OneNote for the first time.

The *Step by Step* approach

The book's coverage is divided into chapters representing OneNote skill set areas, and each chapter is divided into topics that group related skills. Each topic includes expository information followed by generic procedures. At the end of the chapter, you'll find a series of practice tasks you can complete on your own by using the skills taught in the chapter. You can use the practice files that are available from this book's website to work through the practice tasks, or you can use your own files.

Download the practice files

Before you can complete the practice tasks in this book, you need to download the book's practice files to your computer from <http://aka.ms/OneNoteSBS/downloads>. Follow the instructions on the Downloads tab.



IMPORTANT OneNote is not available from the book's website. You should install that app before working through the procedures and practice tasks in this book.

The practice file folder for each chapter includes a OneNote notebook (and sometimes additional practice files). Each notebook has a section for each set of practice tasks in that chapter. After you download the practice files, you can open the notebooks directly from the practice file folders, and close them after you complete the practice tasks.



SEE ALSO For information about opening and closing notebooks, see "Create and manage OneNote notebooks" in Chapter 1, "Manage notebooks, sections, and pages."

OneNote automatically saves changes that you make to the notebooks. If you later want to repeat practice tasks, you can download the original practice files again.

The following table lists the practice files for this book.

Chapter	Folder	Notebooks and files
1: Manage notebooks, sections, and pages	Ch01	OneNoteSBS_Ch01
2: Create and format notes	Ch02	OneNoteSBS_Ch02
3: Work with your notes	Ch03	OneNoteSBS_Ch03 LevelDescriptions.docx WineryLandscape.jpg
4: Add ink and shapes to a notebook	Ch04	OneNoteSBS_Ch04
5: Review and password-protect notebook text	Ch05	OneNoteSBS_Ch05
6: Manage views, windows, and page versions	Ch06	OneNoteSBS_Ch06 LevelDescriptions.docx
7: Organize notes by using tags and categories	Ch07	OneNoteSBS_Ch07
8: Print and share notebooks and pages	Ch08	OneNoteSBS_Ch08
9: Use OneNote with Outlook and Excel	Ch09	OneNoteSBS_Ch09 IdentifyTrends.xlsx
10: Manage OneNote options and the interface	Ch10	None
11: Enhance OneNote by using the Onetastic add-in	Ch11	OneNoteSBS_Ch11

Ebook edition

If you're reading the ebook edition of this book, you can do the following:

- Search the full text
- Print
- Copy and paste

You can purchase and download the ebook edition from the Microsoft Press Store at <http://aka.ms/OneNoteSBS/details>.

Get support and give feedback

This topic provides information about getting help with this book and contacting us to provide feedback or report errors.

Errata and support

We've made every effort to ensure the accuracy of this book and its companion content. If you discover an error, please submit it to us at <http://aka.ms/OneNoteSBS/errata>.

If you need to contact the Microsoft Press Support team, please send an email message to mspinput@microsoft.com.

For help with Microsoft software and hardware, go to <http://support.microsoft.com>.

We want to hear from you

At Microsoft Press, your satisfaction is our top priority, and your feedback our most valuable asset. Please tell us what you think of this book at <http://aka.ms/tellpress>.

The survey is short, and we read every one of your comments and ideas. Thanks in advance for your input!

Stay in touch

Let's keep the conversation going! We're on Twitter at <http://twitter.com/MicrosoftPress>.

Adapt exercise steps

This book contains many images of the OneNote user interface elements (such as the ribbon and the app window) that you'll work with while performing tasks in OneNote on a Windows computer. Depending on your screen resolution or app window width, the OneNote ribbon on your screen might look different from the one shown in this book. As a result, procedural instructions that involve the ribbon might require a little adaptation.

Simple procedural instructions use this format:

1. On the **Insert** tab, in the **Time Stamp** group, click the **Time** button.

If the command is in a list, the instructions use this format:

1. On the **Draw** tab, in the **Edit** group, click the **Arrange** button and then, in the **Arrange** list, click **Bring Forward**.

If differences between your display settings and mine cause a button to appear differently on your screen than it does in this book, you can easily adapt the steps to locate the command. First click the specified tab, and then locate the specified group. If a group has been collapsed into a group list or under a group button, click the list or button to display the group's commands. If you can't immediately identify the button you want, point to likely candidates to display their names in ScreenTips.

Multistep procedural instructions use this format:

1. To select the images that you want to move forward, hold down the **Ctrl** key and click the images.
2. On the **Draw** tab, in the **Edit** group, click the **Arrange** button to display a menu of arrangement options.
3. On the **Arrange** menu, click **Bring Forward**.

On subsequent instances of instructions that require you to follow the same process, the instructions might be simplified in this format because the working location has already been established:

1. Select the images you want to move backward.
2. On the **Arrange** menu, click **Send Backward**.

The instructions in this book assume that you're interacting with on-screen elements on your computer by clicking (with a mouse, touchpad, or other hardware device). If you're using a different method—for example, if your computer has a touchscreen interface and you're tapping the screen (with your finger or a stylus)—substitute the applicable tapping action when you interact with a user interface element.

Instructions in this book refer to OneNote user interface elements that you click or tap on the screen as *buttons*, and to physical buttons that you press on a keyboard as *keys*, to conform to the standard terminology used in documentation for these products.

When the instructions tell you to enter information, you can do so by typing on a connected external keyboard, tapping an on-screen keyboard, or even speaking aloud, depending on your computer setup and your personal preferences.

Work with your notes

3

Many of the notes you make in your OneNote notebooks will consist of text that you type or write onto a page. If you want to make a quick note without opening OneNote, you can do so by using tools on the Windows taskbar. After you create the quick note, you can add it to your notebook. You can also organize your data by using tables, attach files and printouts, and add images to help make your notes clear.

If you want to create a clickable link to an outside source, such as a webpage, file, or location within a OneNote notebook, you can do so. You can also add media content by recording an audio or video note, identify when you made a note by adding a time and date stamp, and capture mathematical information by using symbols and equations.

This chapter guides you through procedures related to creating quick notes, adding tables, attaching files and printouts, adding images and screen clippings, creating links to resources, recording audio and video notes, inserting time and date stamps, and adding symbols and equations.

In this chapter

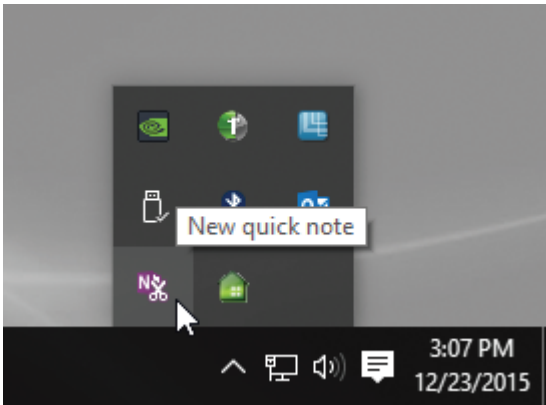
- Create quick notes
- Add tables
- Attach files and printouts
- Add images and screen clippings
- Create links to resources
- Record audio and video notes
- Insert time and date stamps
- Add symbols and equations

Practice files

For this chapter, use the practice files from the OneNoteSBS\Ch03 folder. For practice file download instructions, see the introduction.

Create quick notes

Great ideas come from articles you read, videos you watch, and associations you make when you're doing other work. You can capture those ideas in OneNote by creating a quick note. Installing OneNote adds the OneNote icon (an icon of the letter *N* with a pair of scissors) to the hidden icons tray on the Windows taskbar. The default behavior of this icon is to create a quick note when it is clicked.



Use the OneNote icon to create a quick note

When you create a new quick note, OneNote opens a small window where you can enter your note and format its text.



TIP You can change the behavior of the icon in the tray on the Windows taskbar so that clicking it takes a screen clipping or opens the full OneNote app.

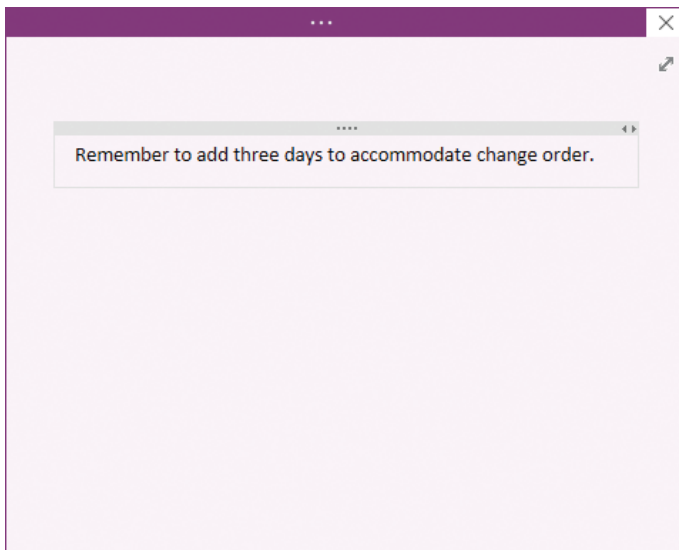
After you create a quick note from Windows, you can view it within your OneNote notebook, copy it to a new location in OneNote, or get rid of it entirely. You can also use the OneNote icon's options to capture a screen clipping, which is an image of a portion of your computer display.



SEE ALSO For more information about working with screen clippings, see "Add images and screen clippings" later in this chapter.

To create a quick note

1. Do either of the following:
 - On the Windows taskbar, click the **Show hidden icons** arrow, and then click the **OneNote** icon.
 - Press **Windows logo key+N**.
2. In the quick note window, type or write the note's text.



Add text to a quick note without starting the main OneNote app

3. Click the **Close** button in the upper-right corner of the quick note window to close the window.

To format a quick note

1. Click the **Auto-Hide Ribbon** button (the three dots) at the center of the quick note window's title bar to display the ribbon.
2. Use the buttons on the ribbon tabs to format your quick note's contents.

To open a quick note in its OneNote page

1. Click the **Normal View** button (the two-headed arrow) in the upper-right corner of the quick note.
2. Browse your OneNote notebooks and tabs to see where your Quick Notes tab is.
3. Right-click the page name, **Untitled page**, click **Rename**, type a new name for the page, and press **Enter**.



TIP If you have OneNote open, this might open a second instance. When your quick note appears as a page in OneNote, you'll know it's a quick note because it has a pink or salmon-colored background (instead of white), and it won't have the page title section at the top like the other OneNote pages.

To change the default quick note operation

1. On the Windows taskbar, click the **Show hidden icons** button, right-click the **OneNote** icon, point to **OneNote icon defaults**, and click one of these options:
 - **New quick note**
 - **Open OneNote**
 - **Take screen clipping**

To turn off quick notes

1. On the Windows taskbar, click the **Show hidden icons** button, right-click the **OneNote** icon, and then click **Close**.

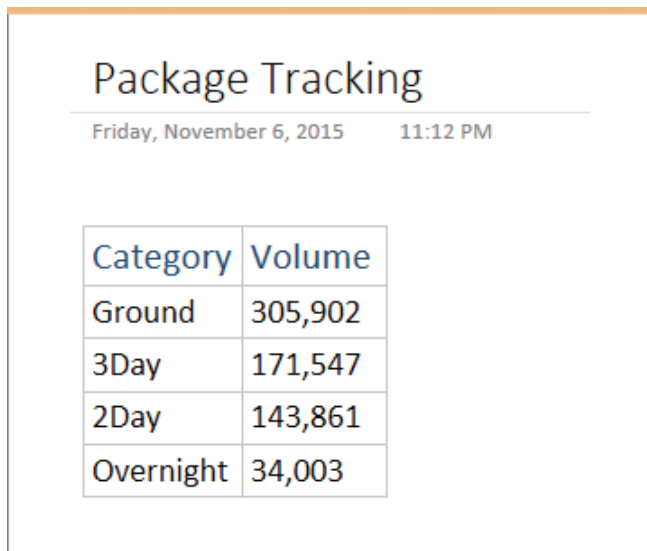
To view a quick note within a notebook

1. Open a notebook.
2. Click the **Click to view other notebooks** button in the upper-left corner of the screen (the button displays the name of your notebook and a downward-pointing arrow).
3. At the bottom of the list, click **Quick Notes**.

Add tables

One of the strengths of OneNote is that you can use it to type or write notes anywhere on a page, creating layouts that capture the information you want to retain and displaying the notes in a way that helps you process what you learned. Some data, however, is more suited to a table, with well-defined rows and columns.

3



The screenshot shows a OneNote page titled "Package Tracking" with a timestamp of "Friday, November 6, 2015 11:12 PM". Below the title is a table with two columns: "Category" and "Volume". The table contains five rows of data.

Category	Volume
Ground	305,902
3Day	171,547
2Day	143,861
Overnight	34,003

Use tables to organize numerical data

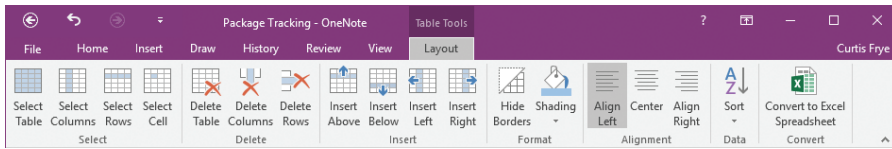
When you create a table, you specify the number of rows and columns it will contain. After your table is in place, you can add or remove rows or columns, change the height of a row or the width of a column, and select columns or rows so you can format or delete their contents in one action.



TIP One common way to format table column headers (the top row) is to align their text with the center of the column and add bold formatting.

You can change the appearance of your table's text by selecting the cells you want to format and applying the formatting you want. If you want to affect the table as a whole, such as by showing or hiding cell borders or adding a background color to

selected table cells, you can do so quickly. You can also format the position of text within a cell, aligning the text with the left edge, center, or right edge of a cell.

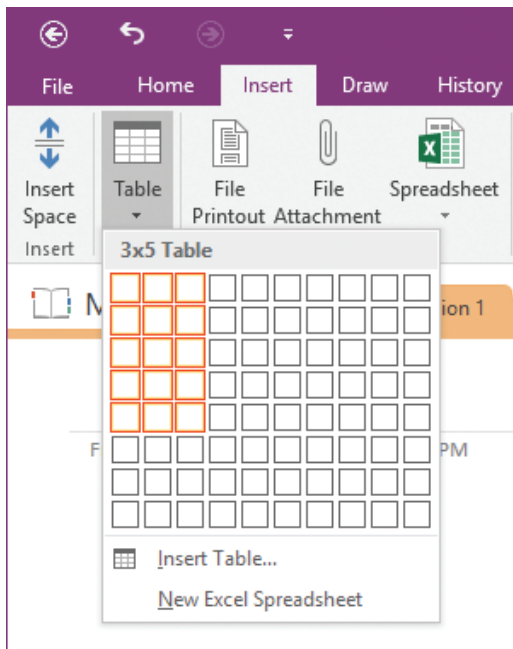


Use the **Table Tools Layout** tool tab to edit and format your table

If you record business data in a notebook, such as monthly sales for various departments, you might find it useful to sort the data based on the contents of a column. You can sort from the largest value to the smallest, or smallest to largest, as your analysis requires. To focus on a subset of your data, you can also sort a subset of the rows in your table.

To create a table

1. Click on the page where you want to insert the table.
2. On the **Insert** tab of the ribbon, in the **Tables** group, click **Table**, and then click the box that represents the number of columns and rows you want in your table.



Select the number of rows and columns to include in your table

Or

1. Click on the page where you want to insert the table.
2. On the **Insert** tab, in the **Tables** group, click **Table**, and then click **Insert Table**.
3. In the **Insert Table** dialog box, in the **Number of columns** box, enter the number of columns you want in your table.
4. In the **Number of rows** box, enter the number of rows you want in your table.
5. Click **OK**.

To enter or edit the contents of a table cell

1. Click in the cell where you want to enter or edit content.
2. Use data entry, editing, and formatting techniques, such as typing, pasting, and inserting attachments or images, to change the content of the cell.

To move within a table

1. Use any of the following techniques to move within a table:
 - Press **Tab** to move one cell to the right.



TIP Pressing **Tab** when you are in the last cell in a row selects the cell at the start of the row below the active row. If you are in the last cell of the table, pressing **Tab** creates a new row.

- Press **Shift+Tab** to move one cell to the left. (The cursor stops when you reach the first cell.)
- Press an arrow key to move in the direction of the arrow (left, right, up, or down), as follows:
 - Press the **Right Arrow** key when the cursor is in the last cell in a row to select the cell at the start of the row below the active row.
 - If there is a line of text already below the table, press the **Right Arrow** key in the last cell of the table to move below the table. (If the table is at the bottom of the active note, the cursor stops in the last cell of the table.)
 - In any cell in the bottom row of the table, press the **Down Arrow** key to move below the table. (If the table is at the bottom of the note, this action creates a new line.)

- Press the **Left Arrow** key when the cursor is in the first cell in a row to select the cell at the end of the row above the active row.
- If the cursor is in the first cell of the table, press the **Left Arrow** or **Up Arrow** key to move to the line above the table.

To select a table cell

1. Click in the cell you want to select.
2. Do either of the following:
 - On the **Layout** tool tab, in the **Select** group, click **Select Cell**.
 - Press **Ctrl+A** twice.



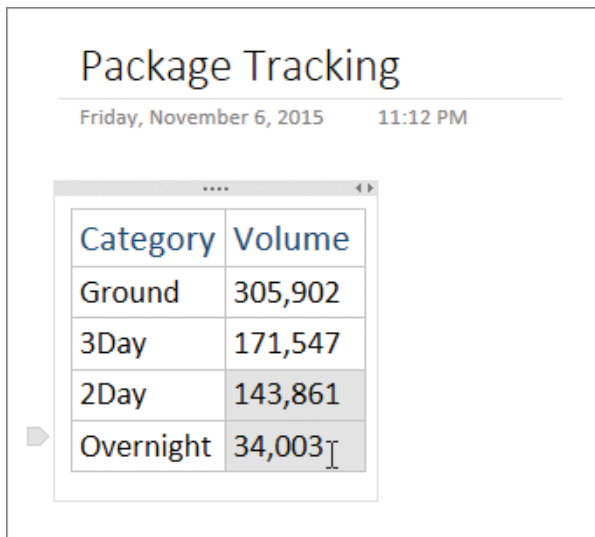
TIP Double-click a word in a cell to select just the word. Triple-click in a cell to select all the content within that cell. If you click the very left of a cell, before any characters, you can't select the word or the cell content.

Or

1. Right-click in the cell you want to select, point to **Table**, and then click **Select Cell**.

To select multiple table cells

1. Click within the first table cell you want to select, and then drag the pointer to select the cells.



Select cells in multiple rows or columns

To select the entire table

1. Click any cell in the table.
2. Do either of the following:
 - On the **Layout** tool tab, in the **Select** group, click **Select Table**.
 - Press **Ctrl+A** four times.

Or

1. Right-click any cell in the table, point to **Table**, and then click **Select Table**.

To select a table column

1. Click any cell in the column you want to select.
2. On the **Layout** tool tab, in the **Select** group, click **Select Columns**.

Or

1. Point to the area just above the top of the column you want to select.
2. After your cursor changes to a black downward-pointing arrow, click the column.

Or

1. Right-click any cell in the column you want to select. Point to **Table**, and then click **Select Columns**.

To select multiple table columns

1. Select cells in the columns you want to select.
2. Do either of the following:
 - On the **Layout** tool tab, click **Select Columns**.
 - Right-click the selected cells, point to **Table**, and then click **Select Columns**.

To select a table row

1. Click any cell in the row you want to select.
2. Do either of the following:
 - On the **Layout** tool tab, in the **Select** group, click **Select Rows**.
 - Press **Ctrl+A** three times.

Or

1. Point to the row you want to select.
2. Click the item indicator to the left of the row.

Or

1. Right-click any cell in the row you want to select. Point to **Table**, and then click **Select Rows**.

To select multiple table rows

1. Select cells in the rows you want to select.
2. Do either of the following:
 - On the **Layout** tool tab, click **Select Rows**.
 - Right-click the selected cells, point to **Table**, and then click **Select Rows**.

To insert a table row

1. Click a cell in the row above or below where you want to insert the row.
2. On the **Layout** tool tab, in the **Insert** group, do either of the following:
 - Click **Insert Above** to insert a row above the row that contains the active cell.
 - Click **Insert Below** to insert a row below the row that contains the active cell.

Or

1. Right-click a cell in the row above or below where you want to insert the row.
2. Point to **Table**, and do either of the following:
 - Click **Insert Above** to insert a row above the row that contains the active cell.
 - Click **Insert Below** to insert a row below the row that contains the active cell.

To insert multiple table rows

1. Above or below where you want to insert the rows, select cells in the same number of rows as the rows you want to insert.
2. On the **Layout** tool tab, in the **Insert** group, do either of the following:
 - Click **Insert Above** to insert the rows above the selected cells' rows.
 - Click **Insert Below** to insert the rows below the selected cells' rows.

Or

1. Above or below where you want to insert the rows, select cells in the same number of rows as the rows you want to insert.
2. Right-click the selected cells, point to **Table**, and do either of the following:
 - Click **Insert Above** to insert rows above the rows that contain the active cells.
 - Click **Insert Below** to insert rows below the rows that contain the active cells.

To insert a table column

1. Click a cell in the column to the left or right of where you want to insert the new column.
2. On the **Layout** tool tab, in the **Insert** group, do either of the following:
 - Click **Insert Left** to insert a column to the left of the column that contains the active cell.
 - Click **Insert Right** to insert a column to the right of the column that contains the active cell.

Or

1. Right-click a cell in the column to the left or right of where you want to insert the new column.
2. Point to **Table**, and do either of the following:
 - Click **Insert Left** to insert a column to the left of the column that contains the active cell.
 - Click **Insert Right** to insert a column to the right of the column that contains the active cell.

To insert multiple table columns

1. To the left or right of where you want to insert the columns, select cells in the same number of columns as the columns you want to insert.
2. On the **Layout** tool tab, in the **Insert** group, do either of the following:
 - Click **Insert Left** to insert the columns to the left of the selected columns.
 - Click **Insert Right** to insert the columns to the right of the selected columns.

Or

1. To the left or right of where you want to insert the columns, select cells in the same number of columns as the columns you want to insert.
2. Right-click the selected cells, point to **Table**, and do either of the following:
 - Click **Insert Left** to insert the columns to the left of the columns that contain the active cells.
 - Click **Insert Right** to insert the columns to the right of the columns that contain the active cells.

To hide or show table borders

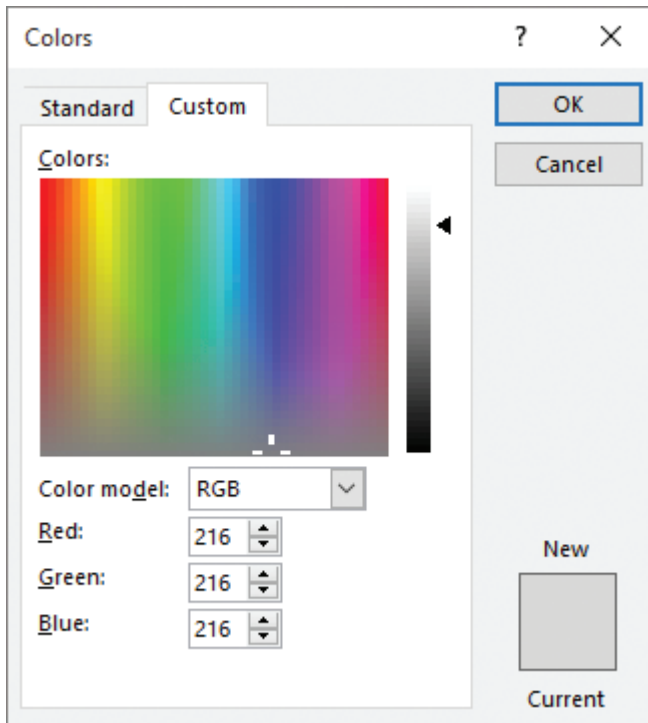
1. Click any cell in the table.
2. On the **Layout** tool tab, in the **Format** group, click **Hide Borders**.

Or

1. Right-click any cell in the table, point to **Table**, and then click **Hide Borders**.

To change the background color of table cells

1. Select the cells to which you want to apply the formatting.
2. Do either of the following:
 - On the **Layout** tool tab, in the **Format** group, click **Shading**.
 - Right-click the selected cells, point to **Table**, and then point to **Shading**.
3. Do either of the following:
 - In the palette that appears, click the color you want to apply.
 - Click **More Colors** to open the Colors dialog box. Select a new color, and then click **OK**.



Select precise colors by using the Colors dialog box

To change the alignment of a table cell's contents

1. Select the table cells you want to format.
2. On the **Layout** tool tab, in the **Alignment** group, click an alignment option (**Align Left**, **Center**, or **Align Right**), to apply it to the selected cells.

To sort data based on a table column's values

1. Click any cell in the column you want to sort.
2. Do either of the following:
 - On the **Layout** tool tab, in the **Data** group, click **Sort**.
 - Right-click the cell, and point to **Table**.

3. Do either of the following:
 - Click **Sort Ascending** to sort the table's rows in ascending order (smallest to largest) based on the values in the column.
 - Click **Sort Descending** to sort the table's rows in descending order (largest to smallest) based on the values in the column.

To sort selected values only

1. Select the cells in the rows you want to sort.
2. Do either of the following:
 - On the **Layout** tool tab, in the **Data** group, click **Sort**, and then click **Sort Selected Rows**.
 - Right-click the selected cells, point to **Table**, and then click **Sort Selected Rows**.
3. In the **Sort** dialog box, in the **Sort by** list, click the name of the column by which you want to sort the selected rows.
4. Do either of the following:
 - Select **Ascending** to sort the rows in ascending order.
 - Select **Descending** to sort the rows in descending order.
5. Click **OK**.

To delete a table

1. Click in any cell in the table.
2. Do either of the following:
 - On the **Layout** tool tab, in the **Delete** group, click **Delete Table**.
 - Press **Ctrl+A** four times.
3. Press **Delete**.

Or

1. Right-click anywhere in the table, point to **Table**, and then click **Delete Table**.

Attach files and printouts

OneNote works well with other Microsoft Office apps. One of the ways you can work with other files is to include them as printouts or attachments. In OneNote, a printout displays the contents of another file in its entirety. If you have a one-page description of service levels saved as a Microsoft Word document, for example, you can display the document as a printout on a OneNote page.

3

The screenshot shows a OneNote page titled "Package Tracking" with a date of "Friday, November 6, 2015" and a time of "11:12 PM". It contains a table with the following data:

Category	Volume
Ground	305,902
3Day	171,547
2Day	143,861
Overnight	34,003

Below the table is a Word document icon labeled "Level Descriptions". The printout of this document is displayed below, showing the following content:

Level Descriptions

- Ground** Package transferred by truck or rail carriers from originating location to destination.
- 3Day** Package transferred by air, truck, or rail as required to guarantee delivery within three business days.
- 2Day** Package transferred by air, truck, or rail as required to guarantee delivery within two business days.
- Overnight** Package transferred by air, truck, or rail as required to guarantee delivery on the next business day.
- Priority Overnight** Package transferred by air, truck, or rail as required to guarantee delivery on the next business day before 10 AM.

Include a file as a printout to see its full contents in OneNote



IMPORTANT When you insert a file as a printout, the entire file appears on the page. Word files appear as multiple images in OneNote, where each page of the document gets its own image on the page.

After you add a printout to your notebook, you can change its label, refresh the printout if you believe the source file has changed, or even save the file under a new name on your computer. If you want to work with a file that has been included as a printout, you can open the file in its original program, if you have the program installed on your computer. When you no longer need the printout in your notebook, you can delete it.

Attaching a file creates a link to the file but doesn't include its contents in your notebook like adding a printout does. Instead, you can double-click the icon that represents the attached file to view or edit it in its source program. You can, if you want, convert the attached file to a printout. If you no longer need a reference to the attached file, you can delete it.

To include a printout in a notebook

1. Click the page after which you want to insert the printout.



TIP The printout might be multiple pages, depending on the length of the original file. The first page starts immediately after your current page and is given the name of the original file. Subsequent pages are named Page 2, Page 3, and so on, and are indented one level below the first page.

2. On the **Insert** tab of the ribbon, in the **Files** group, click **File Printout**.
3. In the **Choose Document to Insert** dialog box, click the file you want to include as a printout, and then click **Insert**.

To open the original printout source file in its native program

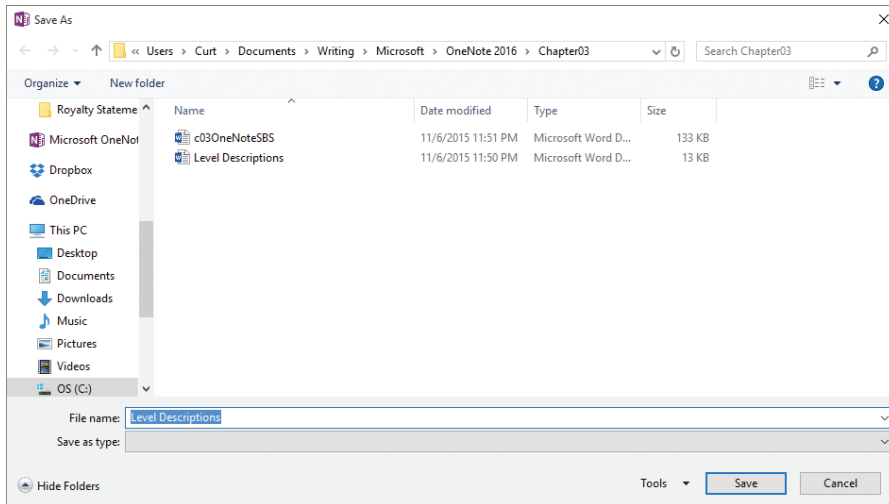
1. At the top of the first printout page, right-click the icon that represents the file you want to open, and then click **Open Original**.

To change the printout label in OneNote

1. Right-click the icon that represents the printout, and then click **Rename**.
2. In the **Rename** dialog box, enter a new name for the file label.
3. Click **OK**.

To save the included printout file under a new name

1. Right-click the icon that represents the printout, and then click **Save As**.
2. In the **Save As** dialog box, navigate to the folder where you want to save a copy of the file.



Use the Save As dialog box to save another copy of the printout source file

3. In the **File name** box, enter a new name for the file.
4. Click **Save**.

To refresh the printout from the original file

1. Right-click the icon representing the printout, and then click **Refresh Printout**.
2. If a dialog box opens and displays a warning about the potential dangers of opening unknown files, click **OK** to refresh the printout.

To delete a printout

1. Right-click the header that represents the printout, and then click **Remove Printout**.

To attach a file to a notebook page

1. Click the page where you want to insert the file icon.
2. On the **Insert** tab, in the **Files** group, click **File Attachment**.
3. In the **Choose a file or set of files to insert** dialog box, browse to and select the file or files you want to attach to the page, and then click **Insert**.
4. In the **Insert File** dialog box, click **Attach File**.
5. In the text area below the attachment's icon, enter text to describe the attached file.

Or

1. From File Explorer, drag the file onto the OneNote page and drop it where you want to insert the file icon.
2. In the **Insert File** dialog box, click **Attach File**.

To open an attached file

1. Double-click the icon that represents the attachment.
2. If a dialog box opens and displays a warning about the potential dangers of opening unknown files, click **OK** to open the file.



IMPORTANT To open the attached file, you must have the source program installed, such as Microsoft Word or Excel.

To convert an attached file to a printout

1. Right-click the icon that represents the attachment, and then click **Insert as Printout**.

To delete an attachment

1. Click the attachment to select it.
2. Press **Delete**.

Add images and screen clippings

Most of the notes you add to your OneNote notebooks will probably be in the form of written and typed text. That said, there are many occasions when the appropriate image provides much more information than a few sentences could. Whether you insert an image related to a product prototype or capture an image of part of your screen to share software instructions with your team, images add substantial value to your notes.

You can add images from a variety of sources, including your computer, your OneDrive account, or Bing Image Search. You can use Bing Image Search to search online for images that are licensed under a Creative Commons license, but you should be sure that the conditions applied to a specific image, such as no commercial use, permit you to use the image in your notebook.



IMPORTANT If you aren't sure whether an image's licensing terms permit your usage, consult with an intellectual property attorney. If any doubt remains, it's safest to use an image with licensing terms that clearly allow for your planned use.

Another method for adding an image to a notebook is to capture part of your screen as a screen clipping, which you can then add to your notebook.

When your image is part of your notebook, you can move it, resize it, make it the page's background image, add alternative text for screen readers or web browsers, and save the image as a separate file for use in other programs. If your image contains text, you can have OneNote copy text from the image so you can use it elsewhere, and you can make the image's text searchable.

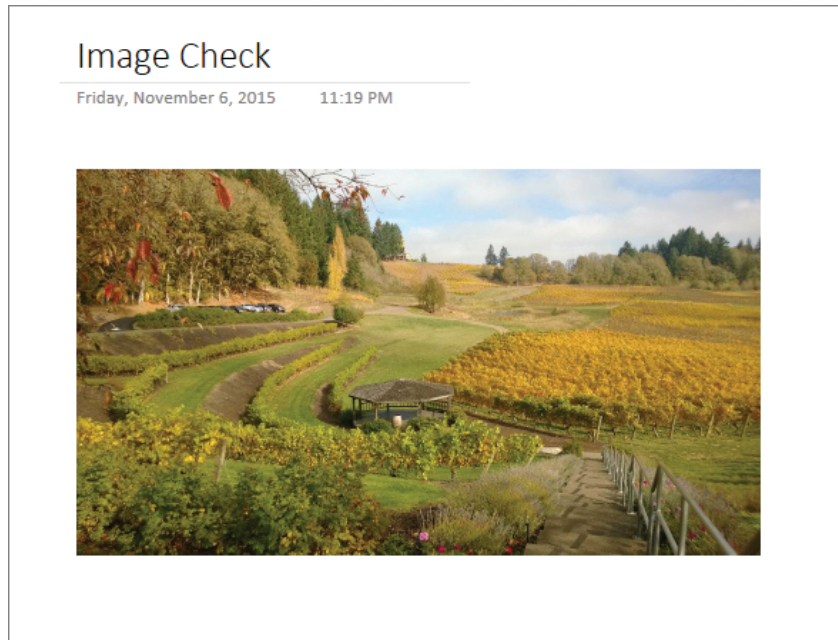


TIP OneNote's text recognition routines are good, but not completely accurate. It's likely you will need to edit the text after it's been extracted.

To insert an image from your computer

1. Click the page where you want to insert the image.
2. On the **Insert** tab, in the **Images** group, click **Pictures**.

3. In the **Insert Picture** dialog box, navigate to the folder that contains the image you want to add.
4. Click the image, and then click **Open**.



Insert images to add information and appeal to your notebook

To insert an image from OneDrive

1. Click the page where you want to insert the image.
2. On the **Insert** tab, in the **Images** group, click **Online Pictures**.
3. In the **Insert Pictures** dialog box, click **OneDrive – Personal**.

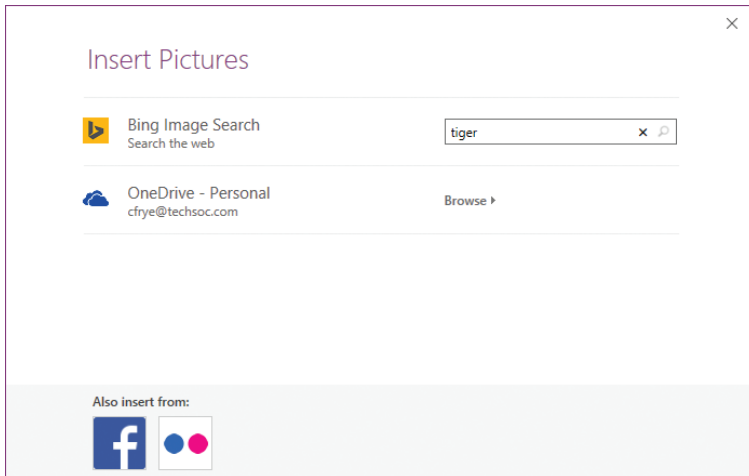


TIP You might not see a OneDrive - Personal option. To connect to your OneDrive account and to see the OneDrive option, click the Sign In With Your Microsoft Account link at the bottom of the Insert Pictures dialog box.

4. Navigate to the folder that contains the image you want to add.
5. Click the image, and then click **Insert**.

To insert an image from Bing Image Search

1. Click the page where you want to insert the image.
2. On the **Insert** tab, in the **Images** group, click **Online Pictures**.



Find pictures online by using Bing Image Search

3. In the **Insert Pictures** dialog box, enter a search term in the text box and press **Enter**.
4. Read the message about image licenses and rights.
5. In the gallery of images, click the image you want to add, and then click **Insert**.



TIP You can also insert images from Facebook and Flickr. To sign in to those services and access the images, in the Also Insert From section at the bottom of the Insert Pictures dialog box, click the Facebook or Flickr icon and follow the appropriate sign-in procedure.

To capture a screen clipping

1. Do either of the following:
 - On the Windows taskbar, click the **Show hidden icons** button, right-click the **OneNote** icon, and then click **Take screen clipping**.
 - Press **Windows logo key+Shift+S**.
2. Click and drag over the area to select the part of the screen you want to capture as an image.
3. In the **Select Location in OneNote** dialog box, do either of the following:
 - Use the tools in the **All Notebooks** pane to select the location in which you want to place the clipping, and then click **Send to Selected Location**.
 - Click **Copy to Clipboard** to copy the image to the Clipboard.



TIP To change the default behavior of the Screen Clipping tool, select the Don't Ask Me Again And Always Do The Following check box, and then click either Send To Selected Location or Copy To Clipboard.

Or

1. Click the page where you want to insert the screen clipping.
2. On the **Insert** tab, in the **Images** group, click **Screen Clipping**.
3. Drag to select the part of the screen you want to capture. When you release the left mouse button, an image of the selected area of the screen appears in your notebook.

To rotate an image

1. Right-click the image, point to **Rotate**, and then click the option that describes how you want to rotate or flip the image.

To move an image

1. Point to the image.
2. When the pointer changes to a four-headed arrow, drag the image to a new location.



TIP If you're having trouble selecting an image, right-click the image, and then click **Move**. Reposition the image, and then click away from it to release the selection.

To resize an image

1. Click the image to select it.
2. Drag any of the handles on the corners or sides of the image to change the image's size.

To restore an image to its original size

1. Right-click the image, and then click **Restore to Original Size**.

To save an image as a separate file

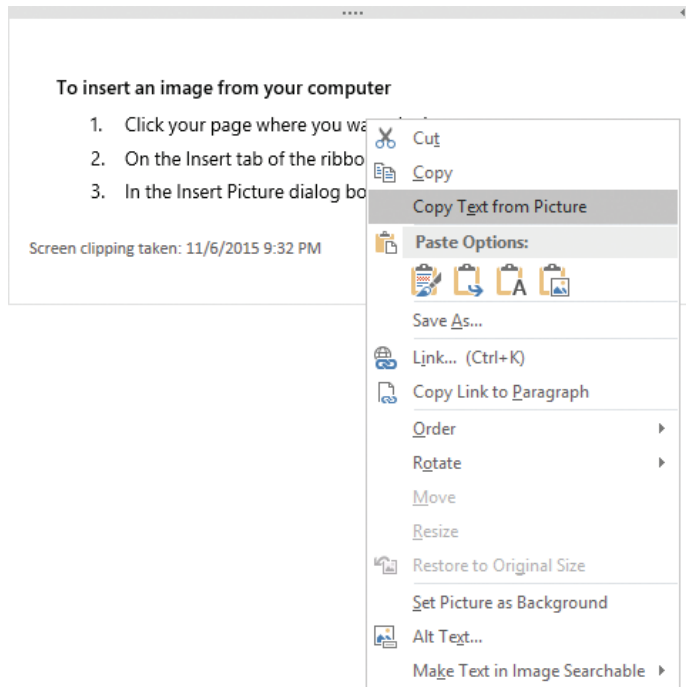
1. Right-click the image, and then click **Save As**.
2. In the **Save As** dialog box, navigate to the folder where you want to save the image.
3. In the **File name** box, enter a name for the new file.
4. Click **Save**.

To set an image as a page's background

1. Right-click the image, and then click **Set Picture as Background**.

To copy text from an image

1. Right-click the image that contains the text you want to copy, and then click **Copy Text from Picture**.



Use text recognition to copy text from screen clippings and other images

2. Paste the copied text elsewhere in your notebook or in another document.



TIP Copying text from an image can be helpful if all you have is a copy of an image, but what you really want is the text so that you can format or edit it. For example, if you have a video recording of a Skype online meeting in which the presenter uses a Microsoft PowerPoint deck, you could capture screenshots of the slides in the deck and paste them into OneNote by using the screen clipping capture technique described in this topic. With the screen clipping images in place, you can paste the copied text onto the page and format it as a note.

To make text within an image searchable

1. Right-click the image that contains the text you want to copy, point to **Make Text in Image Searchable**, and then click the language of the text. (Only English, French, and Spanish are currently available.)

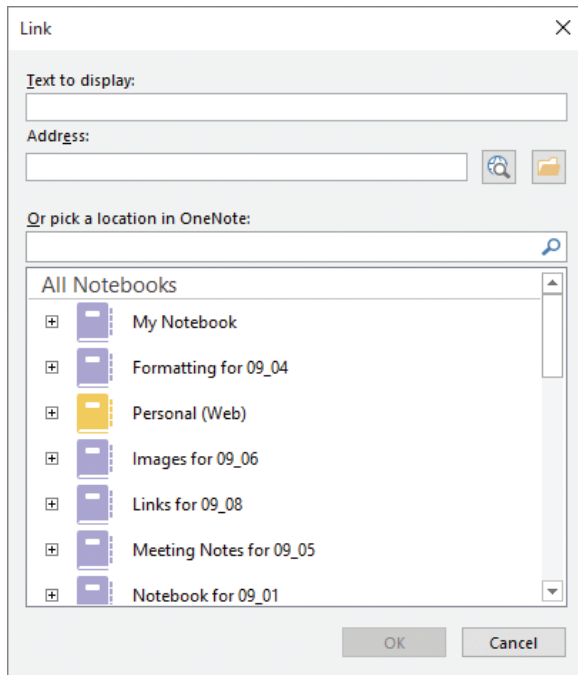
To remove image text from the notebook's collection of searchable text

1. Right-click the image that contains the text you want to remove from the collection, point to **Make Text in Image Searchable**, and then click **Disabled**.

Create links to resources

The Office apps work well together and provide terrific access to web-based resources via links. You can use links (*link* is short for *hyperlink*) to create clickable text, images, and shapes that lead users to the webpages, files, or OneNote notebook locations you identify. If needed, you can find the link address of an object in your notebook.

3



Define a link to a resource by using the Link dialog box

Following a link just requires the reader to click the link within the notebook. After the resource appears, the reader can move back to the notebook page from which he or she started or move forward to the linked resource. Editing a link lets you change its characteristics (such as the object pointed to by the link), whereas deleting a link removes the connectivity but leaves the text or object you used as a base.

To create a link to a web resource

1. Do one of the following:
 - Click the page where you want to insert the link.
 - Select the text to be formatted as a hyperlink.
 - Select the item to serve as the anchor for the hyperlink.
2. Do either of the following to open the Link dialog box:
 - On the **Insert** tab of the ribbon, in the **Links** group, click **Link**.
 - Press **Ctrl+K**.
3. In the **Link** dialog box, edit the contents of the **Text to display** box to specify the text that will serve as the hyperlink.
4. Do either of the following:
 - In the **Address** box, enter the address of the webpage to which you want to link.
 - Click the **Browse the Web** button to open your default web browser, navigate to the webpage to which you want to link, copy the page's address, and paste it into the **Address** box.
5. Click **OK**.

To create a link to a file

1. Do one of the following:
 - Click the page where you want to insert the link.
 - Select the text to be formatted as a hyperlink.
 - Select the item to serve as the anchor for the hyperlink.
2. Do either of the following:
 - On the **Insert** tab, in the **Links** group, click **Link**.
 - Press **Ctrl+K**.
3. In the **Link** dialog box, edit the contents of the **Text to display** box to specify the text that will serve as the hyperlink.
4. Click the **Browse for File** button.

5. In the **Link to File** dialog box, click the file to which you want to link, and then click **Open**.
6. Click **OK**.

To create a link to a location in OneNote

1. Do one of the following:
 - Click the page where you want to insert the link.
 - Select the text to be formatted as a hyperlink.
 - Select the item to serve as the anchor for the hyperlink.
2. Do either of the following:
 - On the **Insert** tab, in the **Links** group, click **Link**.
 - Press **Ctrl+K**.
3. In the **Link** dialog box, edit the contents of the **Text to display** box to specify the text that will serve as the hyperlink.
4. Use the tools available in the **Or pick a location in OneNote** pane to identify the location to which you want to link.
5. Click **OK**.

To copy the link address of a OneNote object

1. Right-click the item to which you want to create a link (such as text, a table cell, or an image), and then click **Copy Link to Paragraph**.
2. Do one of the following:
 - Click the page where you want to insert the link.
 - Select the text to be formatted as a hyperlink.
 - Select the item to serve as the anchor for the hyperlink.
3. Do either of the following:
 - On the **Insert** tab, in the **Links** group, click **Link**.
 - Press **Ctrl+K**.
4. In the **Link** dialog box, paste the copied link address into the **Address** box.
5. Click **OK**.

To follow a link

1. Click the item or text identified as a hyperlink.

To go back after following a link

1. On the **Quick Access Toolbar**, click the **Back** button.



Click the Back or Forward button to move between resources

To go forward to a previously followed link

1. On the **Quick Access Toolbar**, click the **Forward** button.

To edit a link

1. Do either of the following:
 - Select the linked text, and on the **Insert** tab, in the **Links** group, click **Link**.
 - Right-click the link you want to edit, and then click **Edit Link**.
2. Use the tools in the **Link** dialog box to edit the hyperlink.
3. Click **OK**.

To copy a link

1. Do either of the following:
 - Right-click the link and then click **Copy Link** to copy just the link address.
 - Select the hyperlinked text, and press **Ctrl+C**.



TIP You can copy the link address, but it might be faster and more useful to copy and reuse the hyperlinked text.

To remove a link

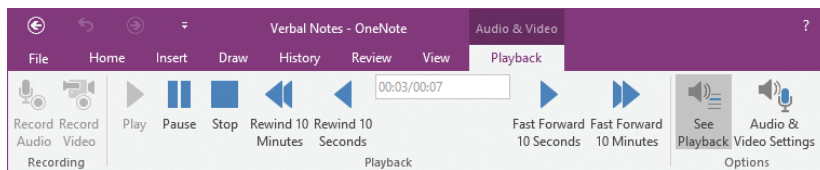
1. Right-click the link, and then click **Remove Link**.

This removes the hyperlink but keeps the underlying text or object.

Record audio and video notes

Contemporary computers are powerful enough to handle audio and video files easily, so it makes sense that you would be able to capture audio and video notes in OneNote. Before you record an audio or video note, you should make sure to identify the devices to use for those tasks and set the format for your recording. Choosing a higher resolution improves the audio or video quality of your recording, at the expense of taking up more room on your hard drive.

After you record an audio or video note, you can play it back in OneNote. The controls you use will be familiar if you've watched video online or by using a DVD player.



Control audio and video playback by using these buttons

Finally, you can change the text associated with a recording, or delete the recording if you no longer need it.

To select an audio input device

1. Click the **File** tab to open the Backstage view, and then click **Options**.
2. In the **OneNote Options** dialog box, click **Audio & Video** in the navigation pane on the left.
3. On the **Audio & Video** page, in the **Audio recording settings** area, in the **Device** list, click the device to use for audio input.
4. If necessary, in the **Input** list, click the input setting you want to use.
5. If necessary, in the **Codec** list, click the encoding scheme you want to use.
6. If necessary, in the **Format** list, click the format you want to use.

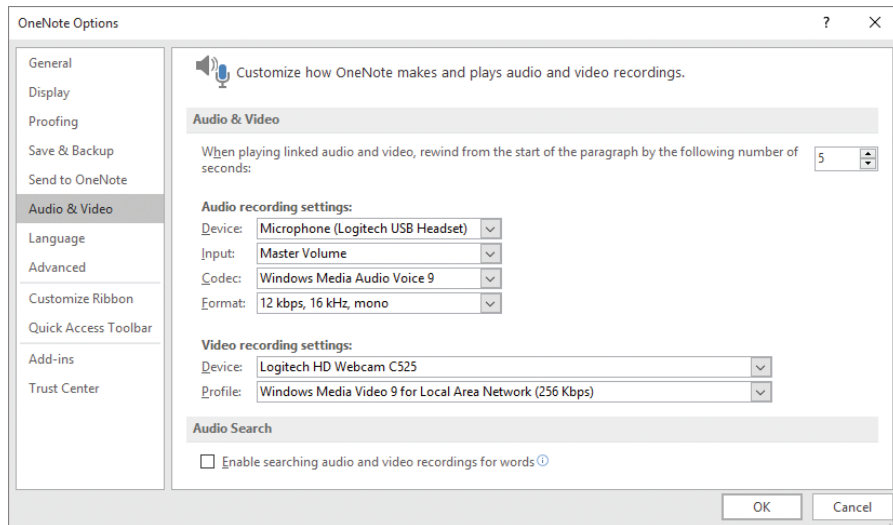


TIP The default audio settings will work under most circumstances, but you can change them if your information technology department recommends another configuration.

7. Click **OK**.

To select a video input device

1. In the **OneNote Options** dialog box, click **Audio & Video**.



Set your audio and video options by using tools in the OneNote Options dialog box

2. On the **Audio & Video** page, in the **Video recording settings** area, in the **Device** list, click the device to use for video input.
3. If necessary, in the **Profile** list, click the encoding scheme you want to use.



TIP The default video settings will work under most circumstances, but you can change them if your information technology department recommends another configuration.

4. Click **OK**.

To record an audio note

1. On a notebook page, click where you want to insert the icon for the audio note.
2. On the **Insert** tab, in the **Recording** group, click **Record Audio**.
3. Record your audio note.
4. On the **Playback** tool tab, in the **Playback** group, click **Stop**.

To record a video note

1. On a notebook page, click where you want to insert the icon for the video note.
2. On the **Insert** tab, in the **Recording** group, click **Record Video**.
3. Record your video note.
4. On the **Playback** tool tab, in the **Playback** group, click **Stop**.



TIP While recording an audio or video note, you can take notes (typed or written with a stylus) and insert images or objects. After you click **Stop** to end the recording, small **Play** buttons appear to the left of each note. You can click each play button to jump to the time of the recording when that note was taken and understand the note in context.

To play an audio or video note

1. Click the icon representing the audio or video note.
2. In the control bar that appears, click the **Play** button.

Or

On the **Playback** tool tab, in the **Playback** group, click the **Play** button.

3. Use the remaining controls on the **Playback** tool tab to pause, rewind, and fast-forward the note.

To rename an audio or video note

1. Right-click the icon representing the note, and then click **Rename**.
2. In the **Rename File** dialog box, enter a new name for the note.
3. Click **OK**.

To delete an audio or video note

1. Right-click the icon representing the note, and then click **Cut**.

Or

1. Click the audio or video note to select it.
2. Press the **Delete** key.

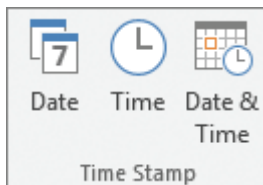
Insert time and date stamps

In many cases, when something happens is as important as what happens. For example, you might want to note the exact time a colleague brought up an idea in a meeting, or record the time and date when you finished working on a proposal.

In OneNote, you can add the current time, the current date, or both the current date and time to your notebook. Unless you edit their text, these values don't change when you close and reopen your notebook, so you have a record of when you added the time or date stamp.

To insert only the current date

1. On a notebook page, click where you want to insert the date.
2. Do either of the following:
 - On the **Insert** tab of the ribbon, in the **Time Stamp** group, click **Date**.
 - Press **Alt+Shift+D**. (D is for date.)



Add Date, Time, or Date & Time stamps to your notebook

To insert only the current time

1. Click where you want to insert the time.
2. Do either of the following:
 - On the **Insert** tab, in the **Time Stamp** group, click **Time**.
 - Press **Alt+Shift+T**. (T is for time.)

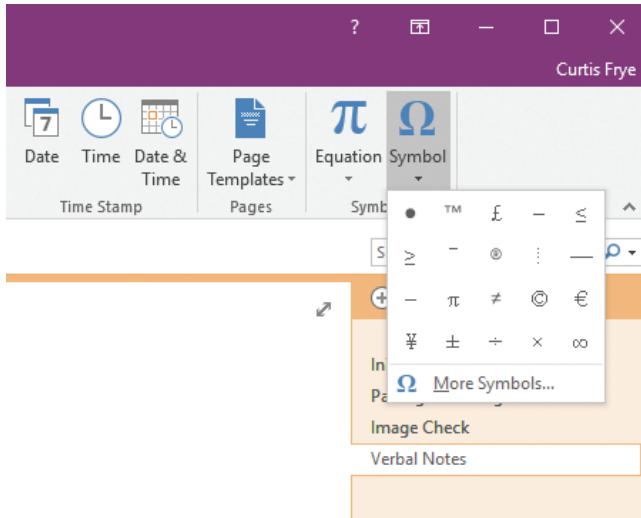
To insert the current date and time

1. Click where you want to insert the date and time.
2. On the **Insert** tab, in the **Time Stamp** group, click **Date & Time**.

Add symbols and equations

Much of the work you do in OneNote will use standard letters and numbers. If you work in a legal or technical field, though, you might use special characters such as the copyright or trademark symbols in your work. In OneNote, you can quickly add any of a set of frequently used symbols.

3



Add frequently used symbols from the Symbol list

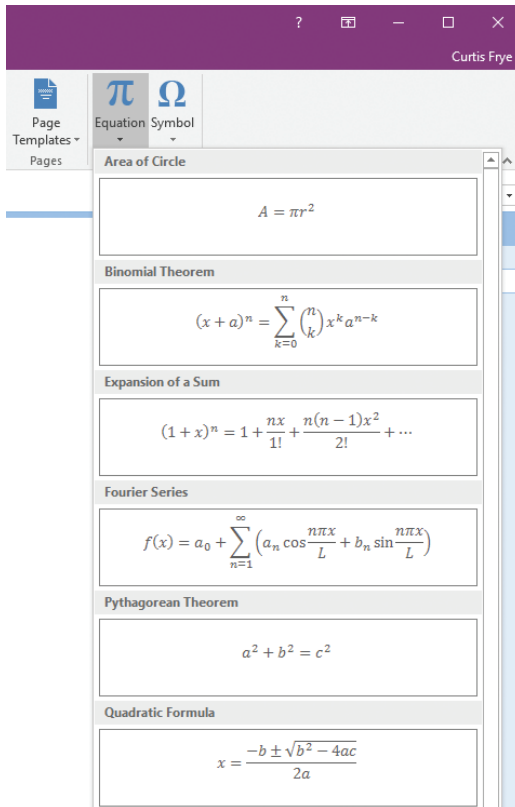
If the gallery of frequently used symbols doesn't contain the symbol you want to add, you might be able to find it in the character set of a font installed on your system. You can look through your fonts to find the character you want. OneNote and other Office apps divide each font into subsets of characters, such as mathematical symbols, Cyrillic alphabet characters, and Roman alphabet characters, to make searching for the character you want easier.



IMPORTANT If you do locate the symbol you want, be sure to write down its Unicode or ASCII character code and the font name so you can find it again.

For mathematical applications, such as statistical analysis or calculus, you can represent equations on a page by using mathematical notation.

OneNote has a gallery of pre-built equations, such as the Pythagorean Theorem and the quadratic formula, that you can add from the ribbon.



Add common equations from the Equation list

You can also build equations from a series of frameworks, which you can find on the Equation Tools Design tool tab that appears when you select an equation.

You can change the way OneNote displays the equation or edit the equation's contents. Editing an equation is a matter of clicking within the body of the equation to activate it, and then editing its contents to create exactly the equation you want. If you decide you no longer need an equation, you can always delete it.



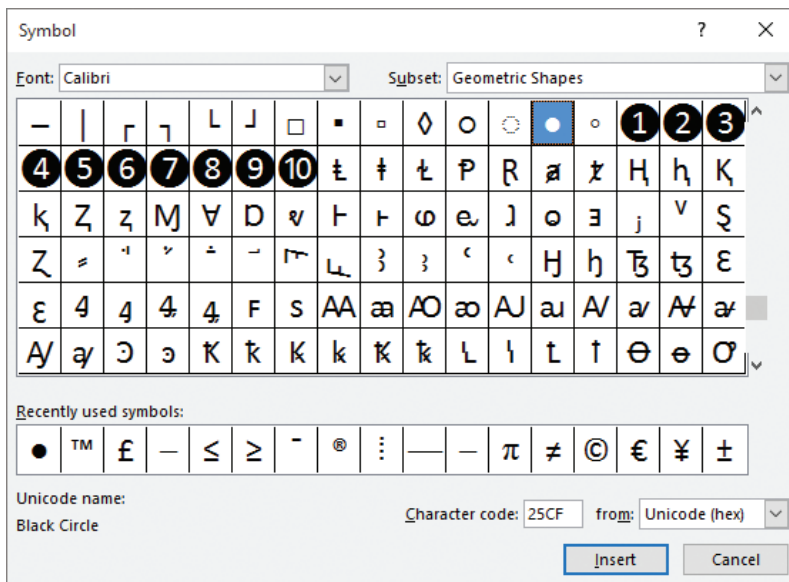
TIP If the equation's text boxes are too small for you to edit its contents effectively, select the equation and increase its font size until you can work with the text easily. After you finish editing your equation, you can select it again and reduce the font size for sharing and publication.

To add a frequently used symbol

1. Position the cursor at the location where you want to add the symbol.
2. On the **Insert** tab of the ribbon, in the **Symbols** group, click **Symbol**.
3. In the gallery that appears, click the symbol you want to add to your page.

To add a character from any available font

1. Position the cursor at the location where you want to add the symbol.
2. On the **Insert** tab, click **Symbol**.
3. In the gallery that appears, click **More Symbols**.



Select a symbol to insert into a notebook by using the Symbol dialog box

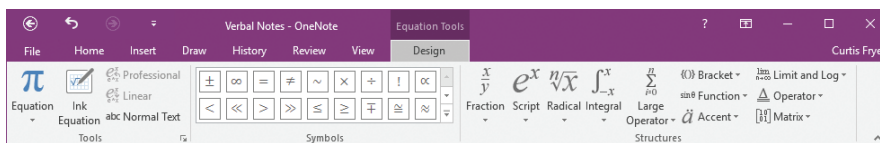
4. In the **Symbol** dialog box, click the **Font** list arrow, and then click the font from which you want to select the symbol.
5. Click the **Subset** list arrow, and then click the subset from which you want to select the symbol.
6. Click the symbol you want to include.
7. Click **Insert**.
8. When you are finished inserting symbols, click **Close**.

To add a common equation

1. Position the cursor at the location where you want to add the equation.
2. On the **Insert** tab, in the **Symbols** group, click the **Equation** list arrow, and then click the equation you want to add.

To create a custom equation

1. Position the cursor at the location where you want to add the equation.
2. On the **Insert** tab, in the **Symbols** group, click **Equation**.



Use the tools on the Equation Tools Design tool tab to create a custom equation

3. On the **Equation Tools Design** tool tab, in the **Structures** group, click the category of equation you want to create.
4. From the gallery that appears, click the specific format for your equation.
5. In your note, click in each editable area of the equation form and enter the text and numbers required for your equation.
6. On the **Design** tool tab, in the **Symbols** group, click each symbol you want to add in the proper place in your equation.

To change how an equation is rendered on the page

1. Select the equation (or part of an equation) you want to change.
2. On the **Design** tool tab, in the **Tools** group, do one of the following:
 - Click **Professional** to display the equation in two-dimensional format (characters stacked vertically) by using mathematics-specific text.
 - Click **Linear** to display the equation in one-dimensional format by using mathematics-specific text.



TIP You can also access the Professional and Linear options by right-clicking your selected equation and clicking Professional or Linear.

- Click **Normal Text** to use non-mathematical text in the part of the page that contains an equation.



TIP Normal Text changes your mathematical formatting to standard text formatting. You keep the two-dimensional stacking, but you lose the spacing and italicized font style that you expect to see in mathematical instructions. This can be useful when you are referring to an equation in a paragraph.

To edit an equation

1. Click within the body of the equation to activate it.
2. Position the cursor where you want to make your change, and use the keyboard and commands on the ribbon to edit the equation.

To delete an equation

1. Select the equation text that you want to delete, or select the item that contains the equation.
2. Do one of the following:
 - Press **Delete**.
 - On the **Home** tab, in the **Basic Text** group, click **Delete**.
 - Right-click the selection, and click **Cut**.

Skills review

In this chapter, you learned how to:

- Create quick notes
- Add tables
- Attach files and printouts
- Add images and screen clippings
- Create links to resources
- Record audio and video notes
- Insert time and date stamps
- Add symbols and equations



Practice tasks

The practice files for these tasks are located in the OneNoteSBS\Ch03 folder. The results of the tasks will be automatically saved into the same file in the same folder.

Create quick notes

In Windows, perform the following tasks:

1. Open any notebook in OneNote, and then use the tools on the Windows taskbar to create a quick note on the active notebook page.
2. In the quick note window, display the ribbon and add formatting to the note you created.
3. Open the quick note you just created in the OneNote app.

Add tables

Open the AddTables section in OneNote, and then perform the following tasks:

1. Create a table with two columns and four rows. In the first row, enter **Month** in the first cell and **Sales** in the second cell. Format these cells by using the **Heading 1** style.
2. In the second row, add the values **January** and **2,095**; in the third row, **February** and **3,478**; and in the fourth row, **March** and **2,561**.
3. Sort the table's rows in ascending order based on the values in the **Sales** column.
4. Add a table row with the values **April** and **1,702**.
5. Sort the bottom three rows in the table in descending order based on the values in the **Sales** column.
6. Change the background color of the **February** and **3,478** cells to yellow.

Attach files and printouts

Open the AttachFiles section in OneNote, and then perform the following tasks:

1. Attach the **LevelDescriptions** document to the active notebook page.
2. Edit the label of the attachment icon to read **Details on delivery service levels**.
3. Include the **LevelDescriptions** document as a printout on the same notebook page as the attachment.
4. Delete the attachment.
5. Save the printout file in the practice files folder with the new name **RevisedDescriptions**.

Add images and screen clippings

Open the AddImages section in OneNote, and then perform the following tasks:

1. Add the **WineryLandscape.jpg** image from the practice file folder to the active notebook page.
2. Move the image below the *Proposed Location* heading.
3. Resize the image so it is about half its original height and width.
4. Take a screen clipping of the structure in the middle of the photo and paste it just above the *Seating Capacity* text on the right side of the page.



TIP Remember that OneNote hides when you capture a screen clipping, so you will need to open the file in the Windows Photo Viewer (or a similar viewer), because you can't capture the image from OneNote, unless you use the Windows Snipping Tool.

Create links to resources

Open the CreateLinks section in OneNote, and then perform the following tasks:

1. Select the *Official Microsoft OneNote site* text and use it as the base for a link to the web address www.onenote.com.
2. Click a blank spot on the page and create a link to the **LevelDescriptions** Word document in the practice file folder.
3. Click the link you just created to open the file.
4. Close the **LevelDescriptions** document, and then edit the text of the link to read **Service Level Details**.

Record audio and video notes

Open the RecordNotes section in OneNote, and then perform the following tasks:

1. Use the tools on the **Audio & Video** page of the **OneNote Options** dialog box to identify your audio and video inputs and the output formats you want to use.
2. Click below the *Audio Note* heading on the active notebook page.
3. Insert and record an audio note that is about 10 seconds in length, and then play it back.
4. Edit the audio note's label to reflect its contents.
5. Click below the *Video Note* heading.
6. Record a video note of about 10 seconds in length.
7. Play back the video note, pausing a few seconds into playback, and then restarting playback to let the note run to the end.

Insert time and date stamps

Open the InsertTimeStamps section in OneNote, and then perform the following tasks:

1. Next to the *Today's Date* text, insert a **Date** stamp.
2. Next to the *Current Time* text, insert a **Time** stamp.
3. Next to the *Document Review Completed* text, insert a **Date & Time** stamp.

Add symbols and equations

Open the AddSymbols section in OneNote, and then perform the following tasks:

1. From the gallery of common symbols, add a British pound currency symbol, £, to the left of the number **1450**.
2. Below the *Area of a Circle Formula* header, add the pre-built equation to calculate the area of a circle.
3. Below the *Additional Equation* header, create a custom equation that includes an exponent and an added constant value.

Index

Numbers

32-bit software 252–254

64-bit software 252–254

A

about OneNote 225

about updates 225

account profiles, updating Microsoft
accounts 221

accounts

changing Microsoft account photos 220

managing Microsoft accounts 218–221

OneDrive 193

signing in to OneDrive 193

switching Microsoft accounts 221

adapting exercise steps xiv–xv

add-ins

downloading 254

installing 254

OneCalendar 255–263

Onetastic 251–274

aligning paragraphs 42

app settings, managing 218–225

assigning a task tag 162

attaching pages to email messages 190–191

attachments 66

audio input device, selecting 77

audio notes

deleting 79

playing 79

recording 77–78

renaming 79

selecting input device 77

author information, removing 269

author notes

See also notes; quick notes; tags

reviewing 154–155

authors, removing history information 269

AutoCorrect

adding rules 122

controlling actions 123

defining exceptions 124

defining math-related rules 125

deleting rules 122

setting options 120–121

undoing actions 123

B

background lines 149–150

backgrounds

cell colors 60–61

changing Office backgrounds 218, 222

images as 71

pages 148–149

Bing Image Search, inserting images from 69

bold, applying to text 33

book errors, logging xiii

bullet scheme, changing 39

bulleted lists 36

automatic creation 235

changing bullets 39

creating 38–39

buttons

adding to Quick Access Toolbar 237–238

adding to ribbon 244

changing order on Quick Access

Toolbar 237–238

removing from Quick Access Toolbar 238

C

- cells (tables)
 - aligning contents 61
 - changing background colors 60–61
 - editing contents 55
 - entering contents 55
 - selecting 56–57
- characters, adding 83
- charts, inserting on notebook pages 215
- cleaning author history 269
- Clipboard 26, 28
- cloud storage, connecting to 221
- collaborating, reviewing author notes 154–156
- colors
 - changing cell backgrounds 60–61
 - changing for background lines 150
 - setting for pages 149
- columns (tables)
 - formatting headers 53
 - inserting 59–60
 - selecting 57
 - sorting data based on values 61
- connected services
 - adding 221
 - managing 222
 - OneDrive 197
- containers 233
- creating Excel spreadsheets from OneNote 216
- creation dates, displaying pages by 255
- cropping images 272
- custom styles 266–267

D

- date stamps, inserting 80
- dates
 - changing display on pages 17
 - displaying pages by 255
- desktop
 - docking OneNote window to 142
 - pinning pages and sections to 264–265

- dictionaries
 - adding flagged words 117
 - custom 115, 117–118
 - editing word lists 118
 - Encarta 129
- docked windows, creating new 147
- docking windows 140, 142
- downloading files from OneDrive 194
- Downloads folder 194
- drawing mode, locking/unlocking 108

E

- ebook edition of this book xiii
- edit permissions 200–201, 203
- email
 - pages to colleagues 189–191
 - sharing notebooks by using 195–196, 200, 202
- embedded links, removing 269
- emptying Notebook Recycle Bin 157
- enabling OneNote updates 224
- Encarta dictionary, looking up words 129
- equations 81
 - adding common 84
 - changing display on pages 84
 - clearing 102
 - converting from ink 99–100
 - correcting handwriting 100–101
 - creating custom 84
 - deleting 85
 - editing 85
 - erasing parts of 100
 - removing by changing font size 269
 - removing by selecting images 271
- eraser types 97–98
- erasing
 - backup copies 132
 - strokes 98
- errata, filing xiii
- Excel *See* spreadsheets; workbooks; worksheets
- Excel tables *See* tables

- exporting
 - file formats 186
 - files as webpages 186
 - files as Word documents 186
 - notebooks 186, 188
 - pages 186, 188
 - Quick Access Toolbar settings 238
 - ribbon customizations to files 245
 - sections 187–188
 - sections as files 9
 - as XPS files 186

F

- Facebook
 - connecting to 221
 - inserting images from 69
- Favorites, pinning pages and sections 264–265
- feedback information xiii
- File Explorer, opening notebooks from 2, 6
- file formats, changing 187
- files
 - See also* printouts
 - attaching 64
 - attaching to notebook pages 66
 - converting to printouts 66
 - downloading from OneDrive 194
 - identifying linked to linked notes 143
 - inserting as printouts 63
 - linking to 74
 - opening attached 66
 - opening in native programs 64
 - uploading to OneDrive 193
- filtering pages by content 259
- Flickr
 - connecting to 221
 - inserting images from 69
- folders, uploading to OneDrive 193
- font size
 - decreasing on a page 269
 - increasing 269
 - setting for OneCalendar 262

- fonts
 - changing 32
 - changing colors 35
- footers, printing 184
- formatting
 - See also* paragraph formatting; text formatting
 - clearing from notes 44
 - column headers 53
 - quick notes 51
- Full Page view 140, 142
- functions, adding to tables 272

G

- getting help xiii
- giving feedback xiii
- grammar error indicators 116
- graph axes, adding 105
- groups 243

H

- handwriting 93, 100
- handwriting recognition, changing
 - languages 129
- hiding
 - author information on pages 155
 - groups of tags 172
 - list detail levels 41
 - note containers 233
 - note containers on pages 233
 - notebook changes read status 154
 - OneNote icon on taskbar 233
 - read status 154
 - ribbon 246
 - ribbon tabs 242
 - table borders 60
- highlighters 94–95
- highlighting
 - search results 268, 270
 - text 30–31, 34

history

- OneNote updates 224
- pages 156–157
- removing author information 269

hyperlinks *See* links

I

images

- copying text from 71–72
- cropping 272
- inserting from Bing Image Search 69
- inserting from Facebook 69
- inserting from Flickr 69
- inserting from OneDrive 68
- inserting from personal computers 67–68
- licensing 67
- managing in Onetastic 268
- moving 71
- as page backgrounds 71
- removing searchable text 72
- resizing 271
- restoring sizes 71
- rotating 70
- saving as separate files 71
- searchable text in 72
- selecting 271

importing

- Quick Access Toolbar settings 239
- ribbon customizations from files 245

indenting paragraphs 42–43

ink 26, 91

- See also* touchscreen entry
- adding notes using built-in pen styles 93
- changing active tool 94
- changing pen styles 94
- converting to equations 99–100
- converting to mathematical expressions 99–100
- converting to text 99–100
- creating custom tools 95
- drawing 96
- erasing 98, 100
- handwriting 96

lasso selection 97

leaving Ink mode 96

returning to Type mode 96

selecting 96–97

selecting input mode 96

selecting items using lasso selection 97

specifying input 93

styles 92–93

tools 94–95

using highlighters 94

Ink mode

See also ink

returning to Type mode 96

italics, applying to text 33

K

keyboard shortcuts 162–164

L

labels, changing for printouts 64

landscape orientation 149, 184

languages

changing for handwriting recognition 129

Mini Translator 125, 128

setting for OneCalendar 262

translating 125–128

lasso selection 97

lines

adding 105

setting for backgrounds 149–150

linked notes 141

creating 142

identifying linked files 143

setting options 144–146

stopping taking 144

LinkedIn, connecting to 221

linking

copying OneNote object addresses 75

to Excel spreadsheets 217

to files 74

to OneNote locations 75

to web resources 74–75

links 73

- copying 76
- deleting in docked windows 144
- editing 76
- following 76
- moving between resources 37
- to online notebooks 196, 201
- removing 76, 269

lists

- bulleted 36, 38–39
- creating 37
- hiding level details 41
- moving items down one level 41
- moving items to another list 41
- moving items up one level 41
- moving items within 37
- numbered 36–38
- selecting items in 40
- showing level details 41
- types 36

locking

- drawing mode 108
- sections with passwords 133

logging bugs xiii

M

macros 273

margins, setting for pages 152

marking as important 162

marking items to recall 163

marking questions to be asked 162

Math AutoCorrect 121–122, 125

math equations

- removing by changing font size 269
- removing by selecting images 271

mathematical expressions, converting from ink 99–100

Medium Eraser 97

meetings

- See also* Outlook meetings
- sharing notebooks with 203

merging sections 12

Microsoft accounts

- changing photos 220
- connecting to 221
- managing 218–221
- requiring to share notebooks 196, 201
- signing out from 221
- switching 221
- updating profile information 221

Microsoft Excel *See* tables; spreadsheets; workbooks

Microsoft OneDrive 192–197

- See also* OneDrive

Microsoft Press contact information xiii

Microsoft SharePoint 198–203

- See also* SharePoint

Mini Toolbar 31, 231

Mini Translator 125, 128

mistakes, informing Microsoft Press xiii

modification dates, displaying pages by 255

N

note containers, showing/hiding on pages 233

notebook content, printing 182–185

notebook pages *See* pages

Notebook Recycle Bin

- clearing contents 156
- emptying 157
- restoring pages/sections from 157

notebook sections *See* sections

notebooks

- See also* pages; sections
- closing 6
- copying sections within 10
- copying to SharePoint 199
- creating from OneDrive 3–4
- creating new sections 8
- creating on OneDrive 194
- creating on your computer 4
- creating tag summary pages 177
- displaying changes by author 155
- displaying changes by date 155
- displaying in new windows 147

notebooks (*continued*)

- displaying recent changes 155
- exporting 188
- including in OneCalendar summary 263
- including printouts 64
- listing tags 172
- managing by using OneCalendar 255
- marking as read 154
- moving sections within 10
- moving to SharePoint 202
- opening from File Explorer 2, 6
- opening from OneDrive 6, 195
- opening from your computer 4–5
- opening recent 6
- for practice tasks xii
- renaming 3
- sharing 195–197, 200–201
- showing/hiding read status 154
- storage locations 194
- stored as folders 2
- turning version saving on/off 157
- viewing quick notes 52

notes 25

- See also* author notes; quick notes; tags
- adding equations 81–85
- adding symbols 81–85
- adding tags 166–169
- adding using ink 92–96
- clearing formatting 44
- copying 26–27
- copying text to the Clipboard 28
- creating 26–27
- creating quick notes 50–51
- creating tags 168–169
- creating using a keyboard 26
- cutting 26, 28
- deleting 28
- deleting audio 79
- deleting items from 44
- deleting video 79
- formatting quick notes 51
- ink entry mode 26

- linked 141–142
- managing content in Onetastic 268
- panning 97
- pasting copied items 26
- pasting text as new 29
- pasting text by using Paste Options 29
- pasting text into 29
- playing audio 79
- playing video 79
- recording audio 77–78
- recording video 77–79
- renaming audio 79
- renaming video 79
- repositioning 27
- reviewing by author 154
- reviewing by read status 154
- saving cut text to the Clipboard 28
- searching by tags 171–172
- summarizing tagged 175–177
- tagging 162–165
- touchscreen entry 26
- numbered lists 36
 - automatic creation 234
 - changing numbering schemes 39
 - creating 37–38
- numbering scheme, changing 39

O

Office

- changing themes 218, 223
- checking version 253
- subscriptions 253
- updating 219, 224

Office 365

- connecting to SharePoint sites 221
- managing subscriptions 218–219, 223

Office backgrounds, changing 218, 222

Office themes, changing 218, 223

Office updates 219

OneCalendar 255–263

- closing 263
- customizing 260–263

- displaying specific time periods 257
 - downloading 255
 - filtering pages 259
 - font size 262
 - including notebooks 263
 - interface language 262
 - previewing pages 261
 - refreshing pages in summary 263
 - starting 256
 - OneDrive 192–197
 - adding to Places list 197–198
 - connecting to 221
 - creating accounts 193
 - creating notebooks 194
 - downloading files from 194
 - inserting images from 68
 - opening notebooks 195
 - opening notebooks from 6
 - sharing notebooks 195–196
 - signing in 193
 - uploading files and folders 193
 - OneNote
 - checking version 253
 - enabling updates 224
 - getting information about 225
 - getting information about updates 225
 - linking to 75
 - managing settings 218–225
 - object addresses 75
 - opening notebooks 195
 - setting options 230–235
 - showing/hiding icon on taskbar 233
 - updates 225
 - updating 219, 224
 - OneNote add-ins
 - OneCalendar 255–263
 - Onetastic 251–274
 - OneNote Packages
 - copying to SharePoint 199
 - uploading to SharePoint 200
 - OneNote Single File Package 9
 - OneNote windows *See* windows
 - Onetastic 251–274
 - adding functions to tables 272
 - custom styles 266–267
 - downloading 254
 - favorites list 265–266
 - installing 254
 - macros 273
 - managing note content 268–272
 - online meetings, sharing notebooks with 203
 - online notebooks, sharing 195
 - online storage
 - connecting to 221
 - managing connections 222
 - orientation
 - controlling 151
 - landscape vs. portrait 149
 - outlines 37, 40–41
 - Outlook meetings
 - displaying details in OneNote 208
 - inserting details into OneNote 212
 - refreshing details in OneNote 212
 - viewing details from OneNote 211
 - Outlook tasks
 - creating from OneNote 208–209
 - deleting from OneNote 210
 - opening from OneNote 210
- P**
- page groups, selecting to print 183
 - page orientation, setting 184
 - page tabs pane 233
 - page titles, deleting 151
 - pages 15–16
 - See also* notebooks; sections
 - adding tags 166–167
 - applying built-in sizes 151–152
 - applying custom templates 153
 - backgrounds 148–149
 - capturing screen clippings 70–71
 - changing displayed date 17
 - changing displayed time 17
 - checking spelling 116

pages (*continued*)

- controlling orientation 151
- copying to different notebooks 19–20
- copying to other sections 18
- copying within sections 18
- creating 17
- creating with background lines 150
- deleting 21
- deleting titles 151
- deleting versions 157
- displaying by date 255
- displaying by modification date 257–258
- displaying in Full Page view 142
- displaying in Normal view 142
- displaying specific versions 157
- emailing 189–191
- exporting 186, 188
- filtering in OneCalendar 259
- inserting images 67–70
- inserting space 108
- managing in Onetastic 264–266
- managing page history 156–157
- managing versions 156–157
- marking as unread 154
- moving to different notebooks 20–21
- moving to other sections 18
- moving within sections 18
- opening from OneCalendar 256
- orientation 149, 151
- panning 97
- pinning to desktop 264–265
- pinning to Favorites 264–265
- previewing 182–184
- previewing in OneCalendar 261
- printing 182–185
- printing footers 184
- renaming 18
- replacing text 270
- restoring from Notebook Recycle Bin 157
- scaling content to fit 183
- searching text 270
- selecting all images 271
- selecting to print 183
- sending 189–191
- setting colors 149
- setting custom height/width 149, 152
- setting print margins 152
- showing/hiding author information 155
- showing/hiding note containers 233
- size parameters 149
- viewing unread author notes 154
- zoom levels 145
- zooming 147–148
- panning pages 97
- paper size
 - changing units of measurement 153
 - creating templates 153
 - setting 183
- paper width, scaling content to fit 183
- paragraph formatting
 - See also* formatting; text formatting
 - changing alignment 42
 - controlling white space 43
 - decreasing indent levels 43
 - deleting 44
 - increasing indent levels 42
 - setting spacing 43
- parental control settings 130
- password-protecting sections 130–135
- passwords
 - assigning to sections 131–132
 - changing for sections 134
 - locking sections 133
 - removing from sections 135
 - setting options 134
 - strong 131
- Paste Options 29, 234
- PDF files
 - exporting notebooks as 186
 - sending pages as 191
- pen colors 92–93
- pen points, finding 92
- pens
 - adding ink notes using built-in styles 93
 - changing 93
 - changing styles 94

- changing styles of shapes 106
- customizing 95
- using as pointers 96
- permissions for shared notebooks 201, 203
- photos, changing for Microsoft accounts 220
- pictures, changing for Microsoft accounts 220
- pinning
 - pages and sections to Favorites 264–265
 - pages and sections to the desktop 264–265
 - windows to top of stacks 147
- Places list
 - adding OneDrive directories 197–198
 - adding SharePoint sites 199
- polygons, adding 105
- portrait orientation 149, 184
- practice files for this book xii
- practice tasks, files for xii
- previewing pages for printing 182–184
- print preview 182–184
- print range, setting 183
- print settings
 - changing 183, 185
 - previewing 182
- printing 182–185
 - changing settings 183
 - footers 184
 - notebook content 182–185
 - page orientation 184
 - previewing content 182–184
 - scaling content 183
 - setting paper size 183
 - setting print range 183
- printouts 63
 - See also* files
 - changing labels 64
 - converting files 66
 - deleting 65
 - including in notebooks 64
 - opening source files 64
 - page names 64
 - refreshing from original files 65
 - saving with new names 65

- profile information, updating Microsoft accounts 221
- proofing, changing languages 129

Q

- Quick Access Toolbar 236
 - adding buttons 237
 - changing order of buttons 237–238
 - exporting settings to files 238
 - importing settings 239
 - removing buttons 238
 - resetting to original configuration 239
- quick notes 50–52
 - See also* author notes; notes; tags
 - changing default operation 52
 - creating 51
 - formatting 51
 - opening in OneNote pages 52
 - turning off 52
 - viewing within notebooks 52
- quick print 185

R

- refreshing pages in OneCalendar summary 263
- renaming
 - Excel spreadsheets from OneNote 216
 - pages 18
- replacing text 270
- research options, setting 130
- researching text 125–126
- resources, linking to 73–77
- restoring pages/sections from Notebook Recycle Bin 157
- reviewing author notes 154
- ribbon
 - adding buttons 244
 - creating custom tabs 243
 - customizing 240–241
 - displaying in docked windows 142
 - displaying in Full Page view 142
 - displaying tabs 242
 - exporting customizations to files 245

- ribbon (*continued*)
 - hiding 246
 - hiding tabs 242
 - importing customizations from files 245
 - removing elements 245
 - renaming elements 244
 - reordering tabs and groups 243
 - resetting to original configuration 245–246
 - unhiding 246
- rows (tables)
 - inserting 58–59
 - selecting 57–58

S

- scaling content for printing 183
- screen clippings, capturing 70–71
- ScreenTips, changing display of 232
- searching
 - current page 270
 - by tags 171–174
- section groups 8
 - creating 13
 - deleting 14
 - displaying 13
 - exiting 14
 - saving sections before deleting 14
- section tabs, changing color of 12
- sections 7
 - See also* notebooks; pages
 - assigning passwords 131–132
 - changing passwords 134
 - copying pages within 18
 - copying to other notebooks 11
 - copying within notebooks 10
 - creating new tabs 8
 - deleting 13
 - displaying 8
 - exporting 9, 187–188
 - inserting 8
 - locking 133
 - merging 12
 - moving pages within 18
 - moving to other notebooks 11–12
 - moving within notebooks 10
 - opening from File Explorer 2
 - pinning to desktop 264–265
 - pinning to Favorites 264–265
 - printing 183
 - removing passwords 135
 - renaming 9
 - restoring from Notebook Recycle Bin 157
 - saving before deleting groups 14
 - viewing password-protected 133
- security, password-protecting sections 130–131
- sending pages 189–191
- settings, managing 218–225
- shapes 102–103
 - adding graph axes 105
 - adding lines 105
 - adding polygons 105
 - aligning on pages 104
 - arranging 107
 - changing order of 104
 - changing pen styles 106
 - deleting 107
 - drawing 104
 - layers 103
 - moving 107
 - resizing 107
 - rotating 107
- SharePoint 198–203
 - adding to Places list 199
 - connecting to 221
 - creating sharing links from 201
 - moving notebooks to 202
 - sharing notebooks with meetings 203
 - storing notebooks in 199
 - uploading OneNote Packages 200
- sharing notebooks
 - with colleagues 195
 - with meetings 203
 - with online meetings 203
 - permissions 200, 203
 - from SharePoint 200–202
 - through social media 201

- signing in to OneDrive 193
- signing out from Microsoft accounts 221
- Snap To Grid, turning on/off 108
- social networks, connecting to 221
- spelling
 - AutoCorrect 120–121
 - checking on pages 116
 - error indicators 116
 - flagged words 116
 - turning off checking as you type 119
- spelling checker 114–115
 - changing languages 117
 - ignoring flagged words 117
 - playing audio file demonstrating pronunciations 117
 - setting Office options 118–119
 - using custom dictionaries 117–118
- spreadsheets
 - copying links to 217
 - creating copies from OneNote 216
 - creating new from OneNote 215, 216
 - deleting from notebooks 217
 - displaying specific elements in OneNote 217
 - editing in OneNote 216
 - inserting on notebook pages 213–215
 - opening from OneNote 217
 - refreshing linked content in OneNote 217
 - renaming in OneNote 216
- storage locations, adding OneDrive directories 197
- strikethrough, applying to text 34
- Stroke Eraser 97
- strokes, erasing 98
- styles, creating custom 266–267
- subscript, applying to text 34
- subscriptions, Office 365 218–219, 223
- summary page *See* tag summary page
- superscript, applying to text 34
- support information xiii
- symbols 81
 - adding characters 83–84
 - adding frequently used 83
 - inserting into notebooks 83
- synonyms, pasting on pages 129

T

- tables
 - adding functions 272
 - aligning cell contents 61
 - changing cell background colors 60–61
 - creating 54–56
 - deleting 62–63
 - editing cell contents 55
 - entering cell contents 55
 - Excel, inserting on notebook pages 215
 - formatting column headers 53
 - hiding/showing borders 60
 - inserting columns 59–60
 - inserting rows 58–59
 - managing in Onetastic 268
 - moving within 55–56
 - selecting 57–58
 - selecting cells 56–57
 - selecting columns 57
 - selecting rows 57–58
 - sorting data based on column values 61
 - sorting selected values 62
- tabs
 - creating custom 243
 - creating custom groups 243
 - displaying on ribbon 242
 - hiding on ribbon 242
 - reordering on ribbon 243
- tag summary page 177
- tagged notes, summarizing onto new pages 175–176
- tagging notes 162–165
- tags
 - See also* author notes; notes; quick notes
 - adding to notes 166–169
 - adding to pages 166–167
 - Address 163
 - built-in 162–163
 - categories 163–164
 - changing order in Tags Summary pane 172
 - changing search scope 174
 - communication and delivery types 164–165
 - Contact 163

tags (*continued*)

- creating 168
- creating custom 169
- creating summary pages 177
- creating using keyboard shortcuts 162–164
- Definition 163
- deleting 165, 167
- displaying within specific groups 173
- grouping in Tags Summary pane 172
- hiding within groups 172
- Highlight 163
- identifying as definitions 163
- Important 162
- keyboard shortcuts 162–163
- listing all tags in scope 172
- listing on a summary page 176
- modifying 169–170
- Phone number 163
- Question 162
- remember for later 163
- removing 167–168
- searching by 171–174
- To Do 162–163, 167

Tags Summary pane

- changing order of tags in 172
- changing scope of search 174
- closing 172
- displaying unchecked items only 173
- grouping tags in 172
- hiding groups of tags 172
- opening 172

tasks, assigning 162

templates

- applying custom 153
- paper size 153

text

- See also* author notes; notes; quick notes
- converting from ink 99–100
- copying from images 71–72
- copying from notes to Clipboard 28
- pasting as new notes 29
- pasting into existing notes 29
- pasting using Paste Options 29
- researching 125–126

- saving to Clipboard 28
 - searchable 72
 - translating to another language 125–126
- text formatting 30–31
- See also* formatting; paragraph formatting
 - applying bold 33
 - applying highlighting 30–31, 34
 - applying italics 33
 - applying strikethrough 34
 - applying subscript 34
 - applying superscript 34
 - applying underline 33
 - changing font colors 35
 - changing fonts 32
 - changing size 32
 - copying 35
 - default font 30
 - highlighting 30–31
- themes, Office 218, 223
- thesaurus 129
- time, changing display on pages 17
- time stamps, inserting 80
- To Do tags, adding 167
- touchscreen entry 26
- See also* ink
- translating text 125–129
- Twitter address for Microsoft Press xiii
- Twitter, connecting to 221
- Type mode, returning to 96, 98

U

- underline, applying to text 33
- unhiding ribbon 246
- unlocking drawing mode 108
- updating Office 219, 224
- updating OneNote 219
 - about updates 225
 - enabling updates 224
 - getting information about updates 225
 - history 224
 - starting updates 224
- user name and initials, editing 232–233

V

versions

- deleting 157
- displaying specific 157
- managing for pages 156–157
- managing page history 156–157
- OneNote 253
- turning saving on/off 157

video input device, selecting 78

video notes

- deleting 79
- playing 79
- recording 77, 79
- renaming 79
- selecting input device 78

W

webpages, exporting notebooks as 186

windows

- docking 140
- pinning to top of stacks 147

Windows taskbar, displaying OneNote icon 233

Word documents

- exporting notebook content as 186
- sending pages as 191

workbooks

- copying links to 217
- creating copies from OneNote 216
- creating new from OneNote 215, 216
- deleting from notebooks 217
- displaying specific elements in OneNote 217
- editing in OneNote 216
- inserting on notebook pages 213–215
- opening from OneNote 217
- refreshing linked content in OneNote 217
- renaming in OneNote 216
- worksheets, inserting on notebook pages 215

X

XPS files, exporting notebooks as 186

Y

YouTube, connecting to 221

Z

zooming pages 147

About the author



Curtis Frye is the author of more than 30 books, including *Microsoft Excel 2016 Step by Step* for Microsoft Press and *Brilliant Excel VBA Programming* for Pearson, UK. He has also created and recorded more than three dozen courses for lynda.com, including *Tableau 9 Essential Training* and *Up and Running with Public Data Sets*. In addition to his work as a writer, Curt is a popular conference speaker and performer, both as a solo presenter and as part of the Portland, Oregon ComedySportz improvisational comedy troupe. He lives in Portland with his wife and three cats.

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