



THE ONLY ONENOTE GUIDE YOU'LL EVER NEED



by Dan Price



The Only OneNote Guide You'll Ever Need

Written by Dan Price

Published October 2016.

Read the original article here: <http://www.makeuseof.com/tag/microsoft-onenote-guide/>

This ebook is the intellectual property of MakeUseOf. It must only be published in its original form. Using parts or republishing altered parts of this ebook is prohibited without permission from [MakeUseOf.com](http://www.makeuseof.com).

Table of contents

An Introduction to OneNote	4
What Exactly Is OneNote?	4
How Do You Get It?	4
Which Platforms Are Supported?	5
Getting Up to Speed – Basic Principles	5
Notebooks	5
Sections	7
Pages	8
Subpages	9
Taking Notes	10
How to Stay Organized	11
Tags	11
Search by Tag	12
The Search Box	13
Send Tasks to Outlook	15
Manage Outlook Meetings	16
Advanced Usage	17
Embedding Files	17
Audio notes	17
Creating Linked Notes	18
Handwritten Notes	18
Math Equations	19
Sharing and Collaborating	21
Keyboard Shortcuts	23
Webclipper	24
Troubleshooting	25
Print Formatting	25
Text Formatting	25
OneDrive Notebook Titles Do Not Update	26
Recover Deleted Notes	27
What Have We Missed?	27



OneNote is often overlooked as a note-taking app, but it deserves more attention. The features are exhaustive, the support is excellent, and it works beautifully with Microsoft's other Office products.

If you use one of the app's competitors – such as Evernote or Todoist – it can be daunting to **make the jump**. I want to help you make your transition as smooth as possible, so in this guide I'll walk you through some of OneNote's main features.

By the time you've finished reading, you'll be a OneNote pro!

An Introduction to OneNote

Before I dive into how to use the app's features, it's important to understand what OneNote is and how to get it.

What Exactly Is OneNote?

The best way to describe OneNote is a “digital notebook”. It'll sync across all your devices, regardless of platform, letting you take all your content with you wherever you go.

Watch: **[What is OneNote? How to use OneNote and its Office 2016 updates](#)**

You can use it to take notes (both handwritten and typed), make drawings, capture screenshots, and record audio. Because it's part of the Microsoft Office suite, it's also **packed with collaboration tools**; sharing notes and projects between users is easy.

It's important to realize it's not a word processor; all the pages are freeform – you can click anywhere in the window and start typing. It's not designed for creating published material; if you want to create content for public consumption, use one of Microsoft's other services instead.

How Do You Get It?

Possibly the best part of OneNote is that **it's 100 percent free**. Unlike Evernote, which charges you for additional features, all of the app's potential is unlocked from the start.

There are a few ways to get your hands on a copy.

- If you subscribe to Office 365, it'll be included as part of your package.
- You can **download a standalone copy** from the OneNote website if you use alternative office productivity software.
- If you have Windows 8 or higher, you can download the **universal app version from the Windows Store**.

Which Platforms Are Supported?

OneNote is available for Windows, Mac, Android, iOS, and Windows Phone. There is also a web app. At the time of writing, there is no officially supported Linux or Chromebook version, though you can use the web app to access the service on those platforms.

The Mac version does not have as many features as the Windows version, much to the chagrin of some users. If you're curious about what OneNote can and cannot do on an Apple system, you should check out our [OneNote for Mac guide](#). This guide will focus exclusively on the Windows desktop version.

Getting Up to Speed – Basic Principles

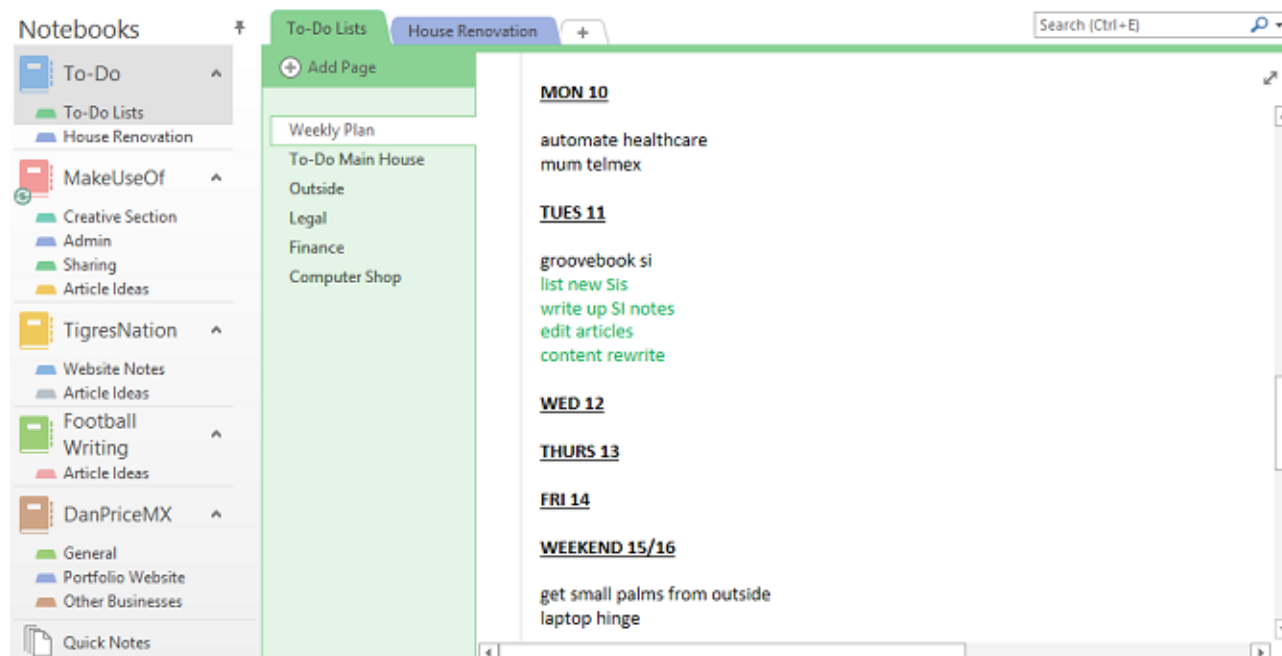
In order to be a OneNote pro, you need to have a good understanding of the app's underlying principles. Without a firm grasp on these basics, you won't be able to make use of its best features.

Notebooks

The primary way of organizing your content is through notebooks. You can have as many notebooks as you want.

Think of them in exactly the same way as you'd think of a traditional paper notebook. You might have one dedicated to chores you need to do around the home, one for making notes about your job, one for saving your travel plans and other important documents, and so on.

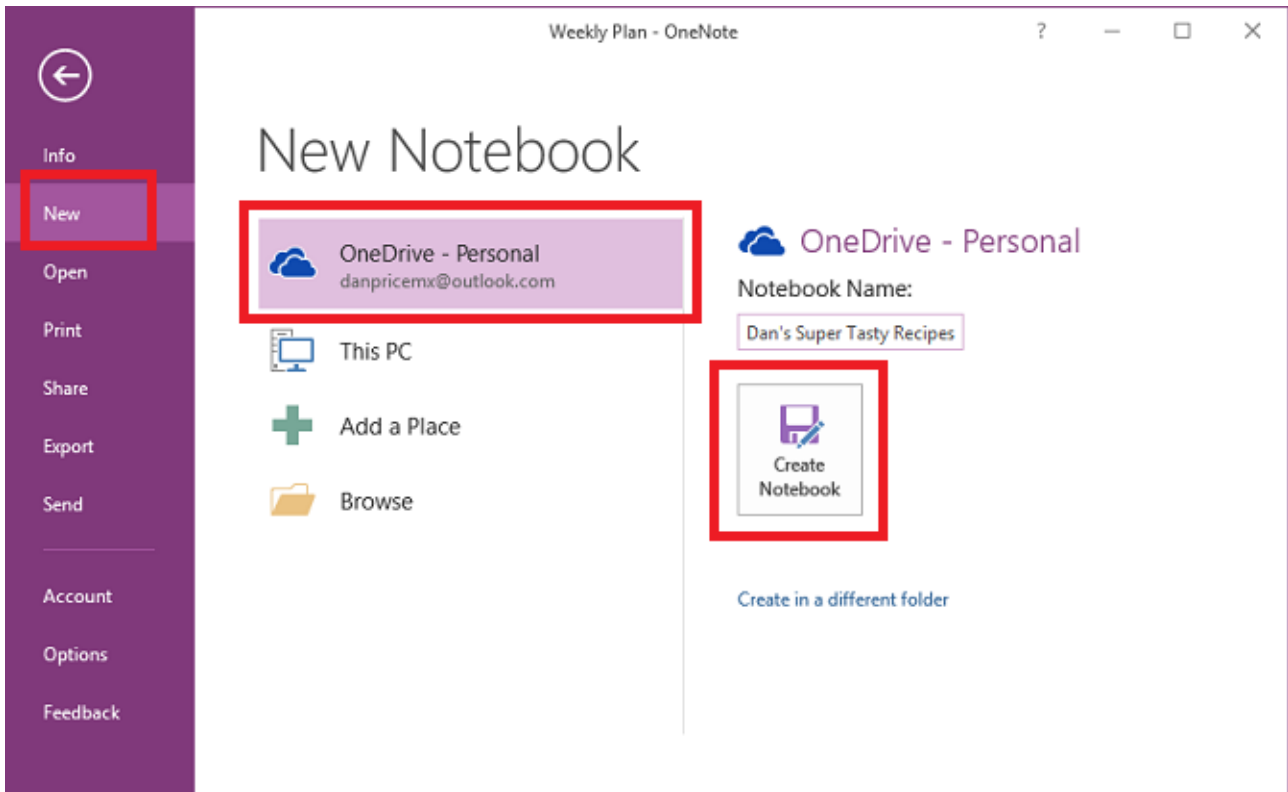
In the image below, you can see how I use my OneNote app.



For the remainder of this guide, I'm going to use the example of a recipe book. I'll make it as we go and you can follow along at home.

To make a new notebook, click **File > New**. You'll be given a choice of where you want to create it – either on your local computer or on OneDrive.

This is important: if you choose to make the notebook on your local PC, you will not be able to access it from other devices. Making it on OneDrive is the better option. Give the notebook a name and hit **Create**.



The new notebook will be displayed in the column on the left of your screen.

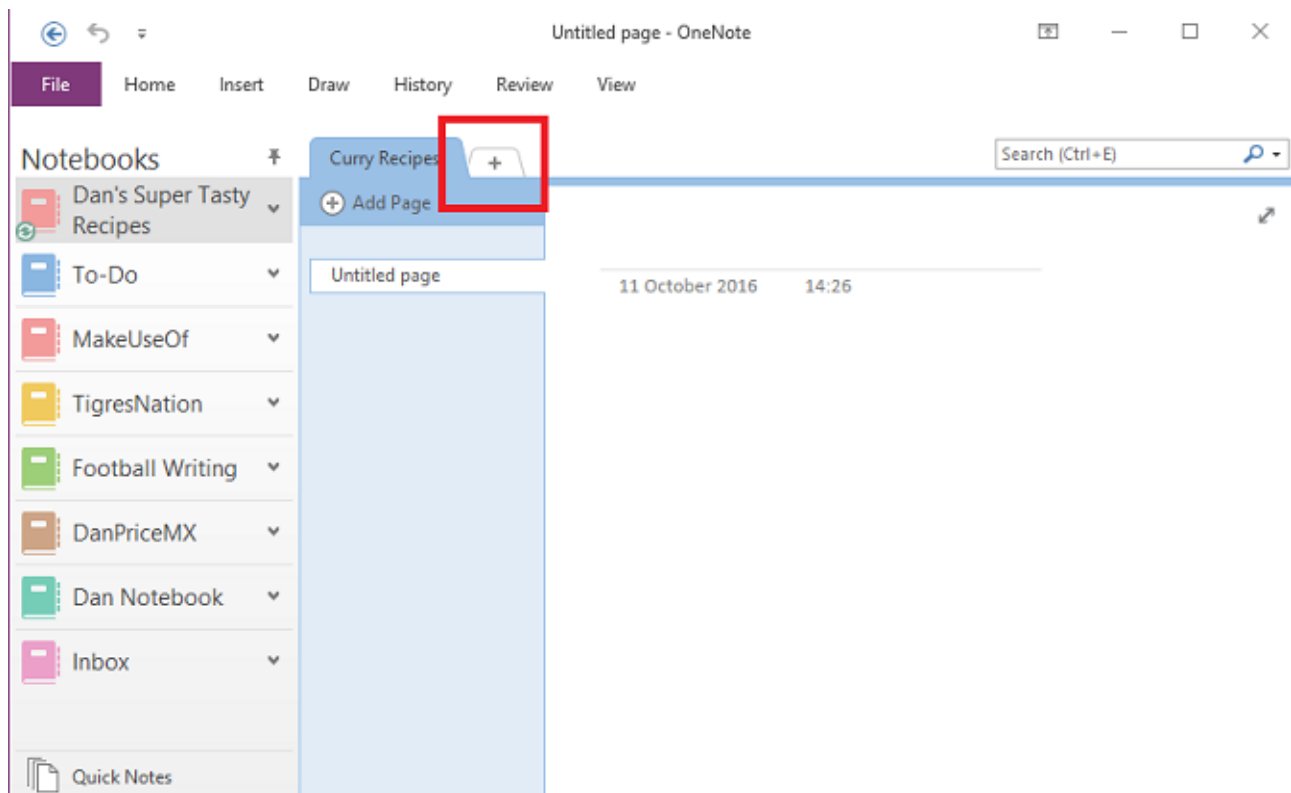
Sections

Sections act as groupings within a notebook. Again, you can have as many sections as you want.

Using my recipe book as an example, I want to create a section for curry, a section for salads, and a section for Mexican food.

OneNote creates a default section called “New Section 1” when you first create a new notebook. Rename this to whatever you want by double clicking on it.

To add new sections, click the + icon to the right of your existing sections.

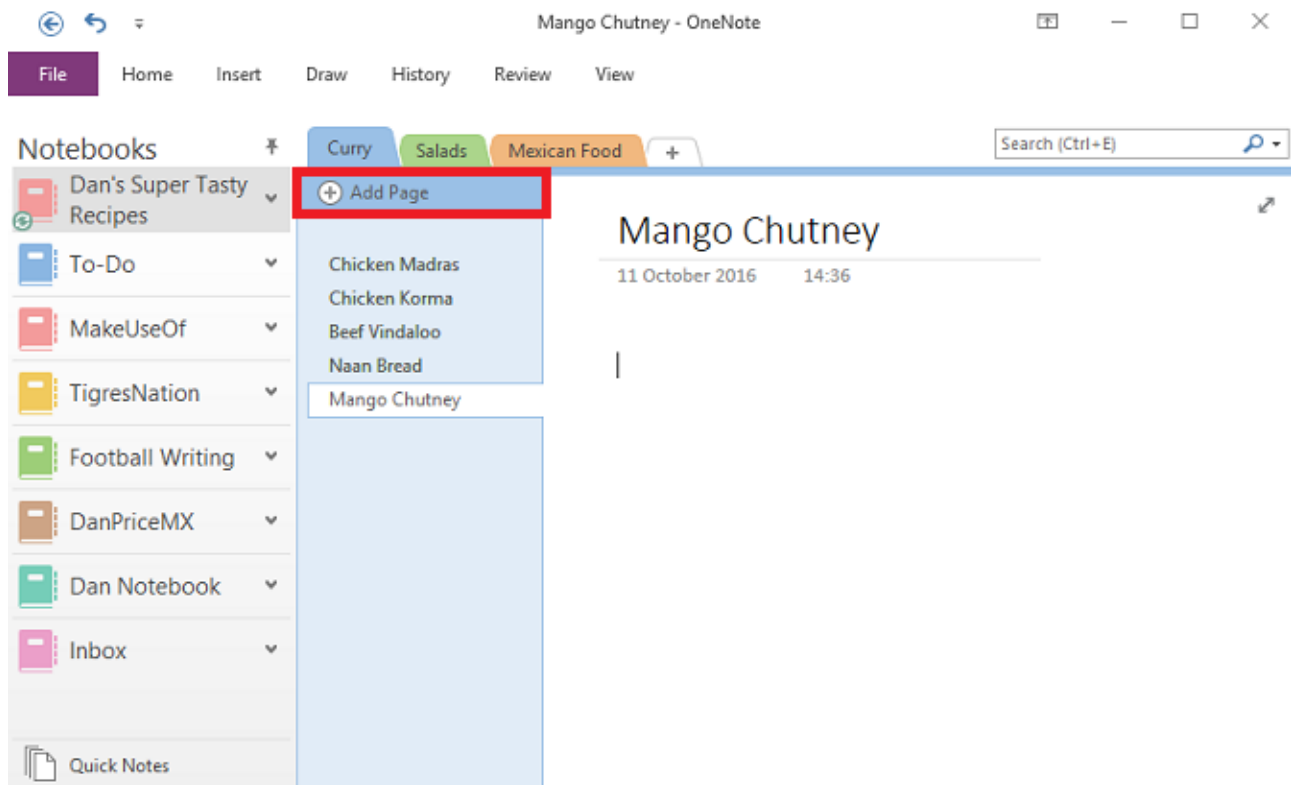


You can change the color of the section tab by right-clicking on it.

Pages

As you might have guessed, pages are individual notes within your sections.

In the context of a recipe book, this is where you'll store each main recipe. As you can see in the image below, I've chosen five individual recipes that I want to save in my curry section.

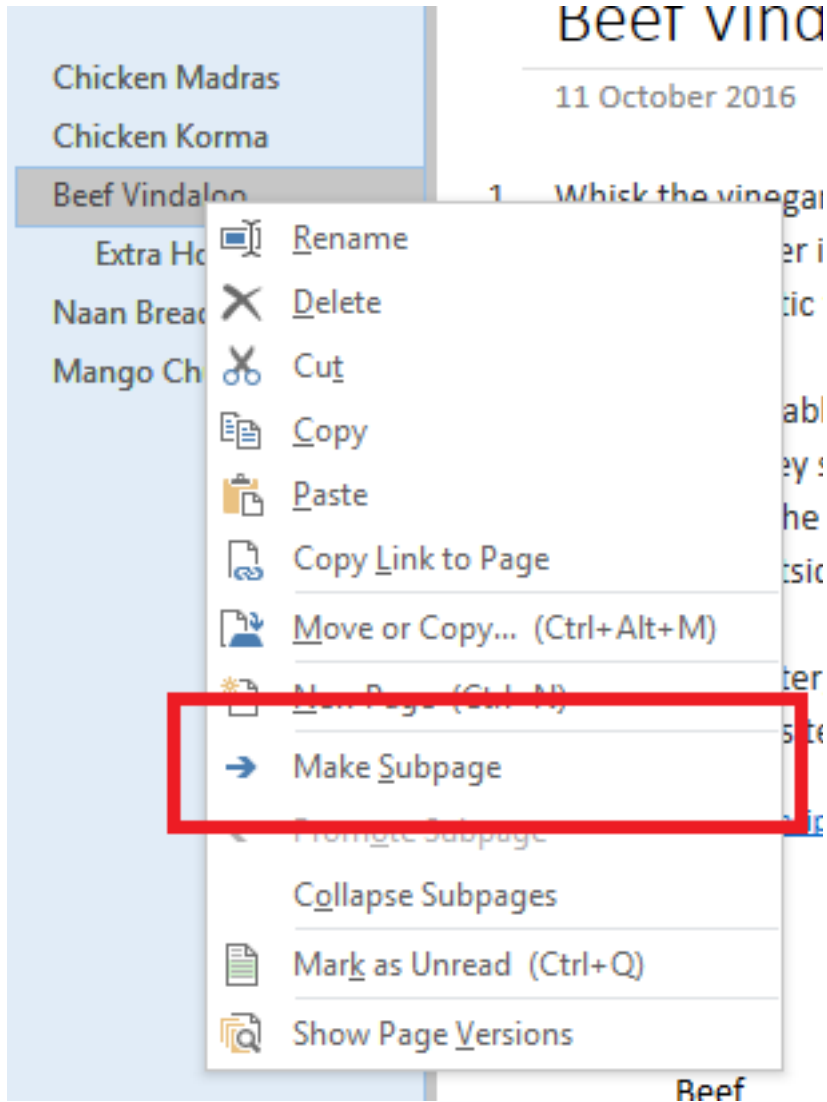


To add a new page, click the **Add Page** button.

Subpages

Subpages are the most granular level in the OneNote hierarchy. They act in exactly the same way as pages but give you the ability to sub-categorize your content even further.

To make a subpage, you first have to create a new page. Then right-click it and select **Make Subpage**.

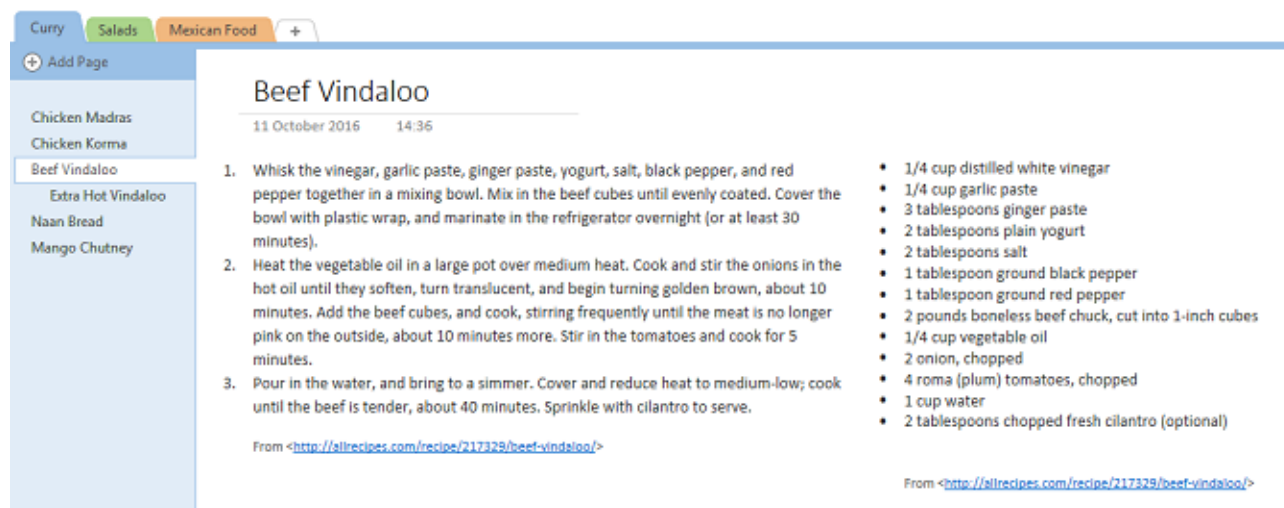


Taking Notes

As mentioned at the start, OneNote lets you add content wherever you want on a page. The content is saved in a note container. They can store text, pictures, audio, video clips, handwriting, and screen clippings.

As soon as you click on a piece of content, the outline of the content's container will be displayed. You can drag the outline to resize it and hover your mouse over the top bar to move it.

In the image below, you can see I've got two containers – one with the ingredients and one with the cooking instructions.



If used properly, these containers are a wonderful way to create visually pleasing and easy-to-follow notes.

To format your notes, you'll find all the usual options (font, size, color, bold, bullet points, etc.) in the **Home** tab at the top of the OneNote window.

How to Stay Organized

As your notebooks start to grow, it's important to make sure your content is well-organized. Failure to stay on top of it will quickly result in a mess, you'll struggle to find the stuff you want.

Tags

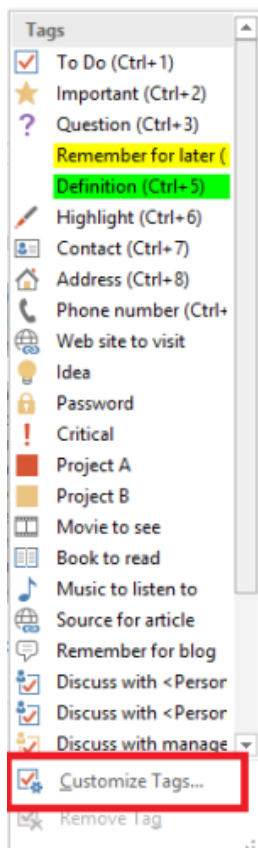
Apart from the previously-explained note hierarchy, the best way to stay on top of your notes is to **make use of the tagging system**.

If you're coming from Evernote, you'll be well-versed in how tags work. Their main purpose is to let you join up content from different notebooks and sections.

In my example, I'm going to tag the recipes with some of the main ingredients. That means if I ever have some leftover chicken in my fridge, I can search by the "Chicken" tag and see all the recipes that include it.

You can add a tag via the **Home** tab. OneNote comes with some default tags already included, but you can safely delete these if you don't think you'll ever use them.

To create your own tag, click the **Home** tab, then expand the list of tags and choose **Customize Tags > New Tag**.



You can only apply tags to individual lines of text within a note container. You cannot add tags to whole sections or pages. For most people, therefore, it makes sense to add the tag just to the first line of a list of notes.

To add a tag, place the cursor at the beginning of the text in question, then navigate to **Home > Tags** and choose the one you want.

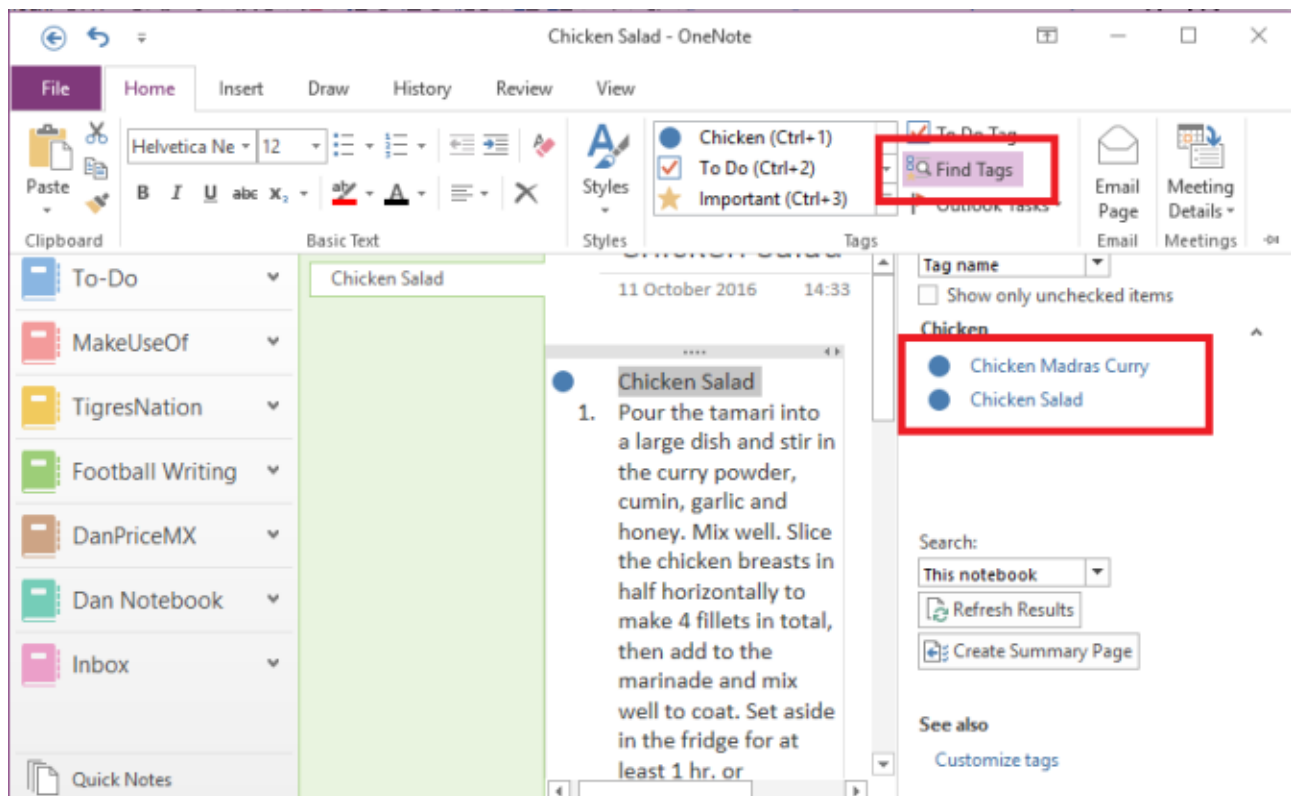
Alternatively, right-click on the line where you would like to place your tag, in the menu that appears click the arrowhead in the top right to expand the tag item in the menu, and choose your tag.



Search by Tag

Once you've tagged all your content correctly, you need to know how to use the tags to find the information you need.

Go to **Home > Find Tags** to see a list of all your tags. As you can see below, all the notes I tagged with "Chicken" are now displayed in a window on the right-hand side of the screen. Click on one of the titles to jump to that particular note.



The Search Box

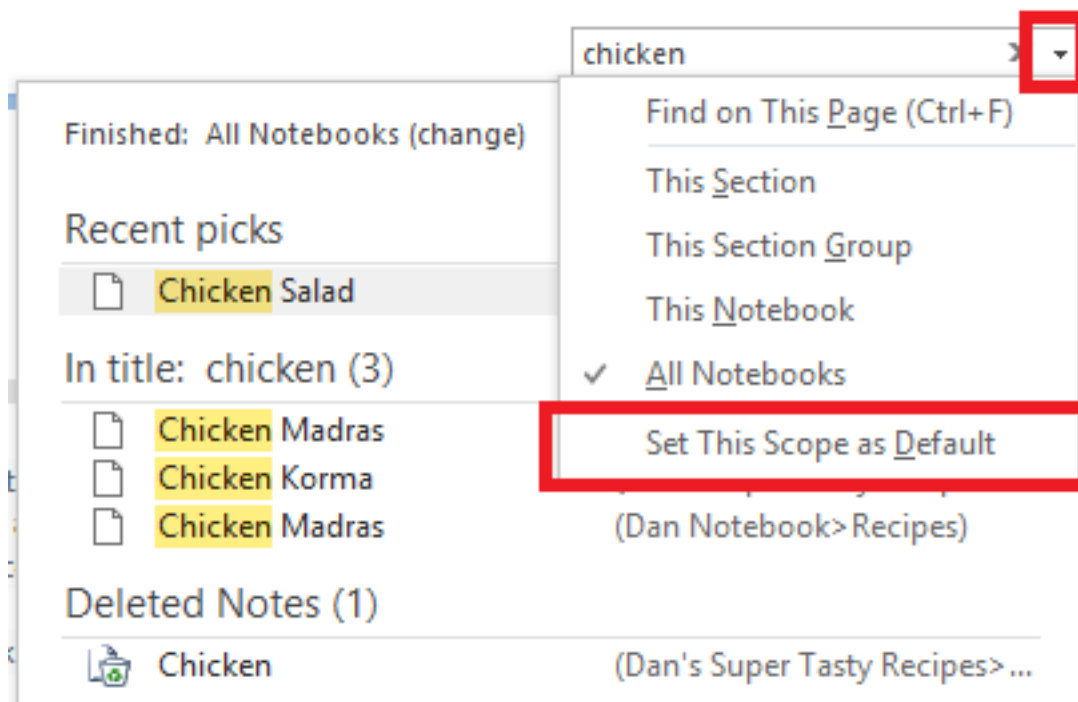
Searching by tags leads onto the next important feature - the search box.

Of course, this box acts exactly how you'd expect; enter the text, press **Enter**, and get a list of results. But its capabilities extend far beyond such simple usage.

The function has an adjustable scope. That means you can decide whether to search all notebooks, the notebook you're currently on, or the section you're currently on.

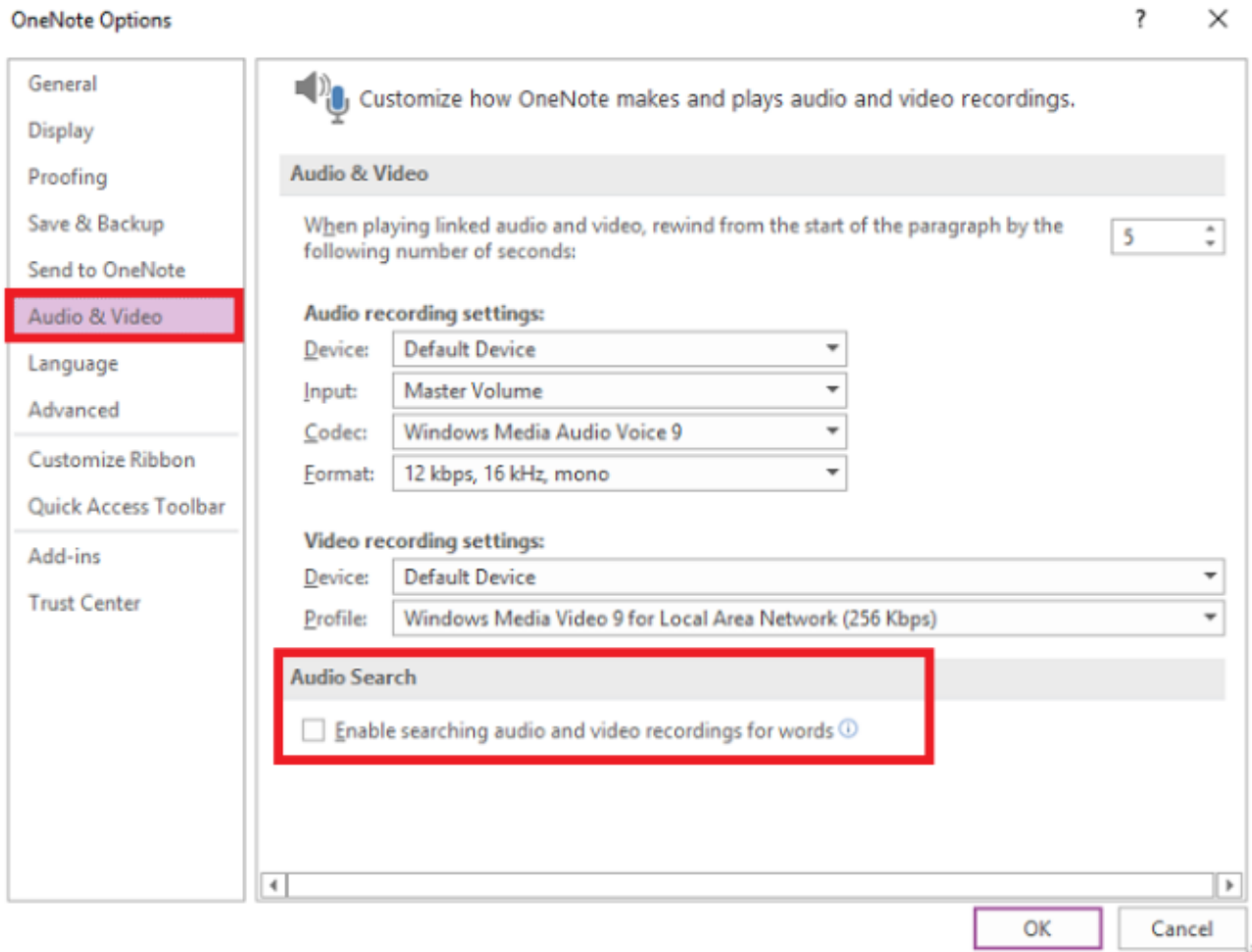
You can also sort the results by date modified, title, or section. Interestingly, this is the only way to find notes by date modified, that information is not accessible elsewhere.

If you spend a lot of time performing similar searches, you can set the default search parameters by clicking **Set This Scope as Default** from the drop-down menu.



The search feature also allows you to search through audio notes as if they were normal text. The option is turned off by default because it slows down searching.

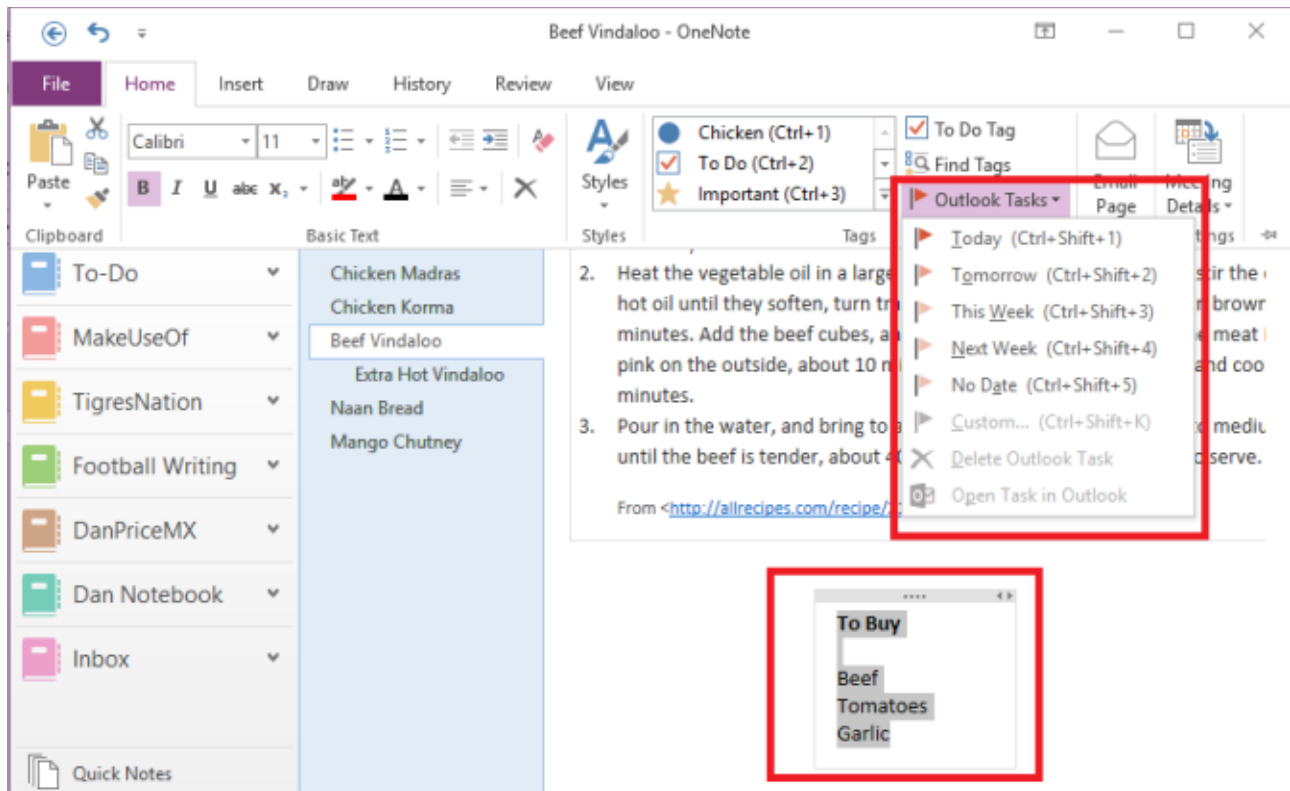
To turn on audio search, you need to navigate to File > Options > Audio & Video. Under the Audio Search section, tick the checkbox next to Enable searching audio and video recordings for words and click OK.



Send Tasks to Outlook

Because OneNote and Outlook are both Microsoft products, they work together seamlessly. It makes managing the divide between your email inbox and your OneNote content a lot easier.

To create an Outlook task, highlight the text you want to add to Outlook. Then click **Home > Outlook Tasks** and select the appropriate time frame. A flag will be shown next to your task in OneNote and it will be added to Outlook.

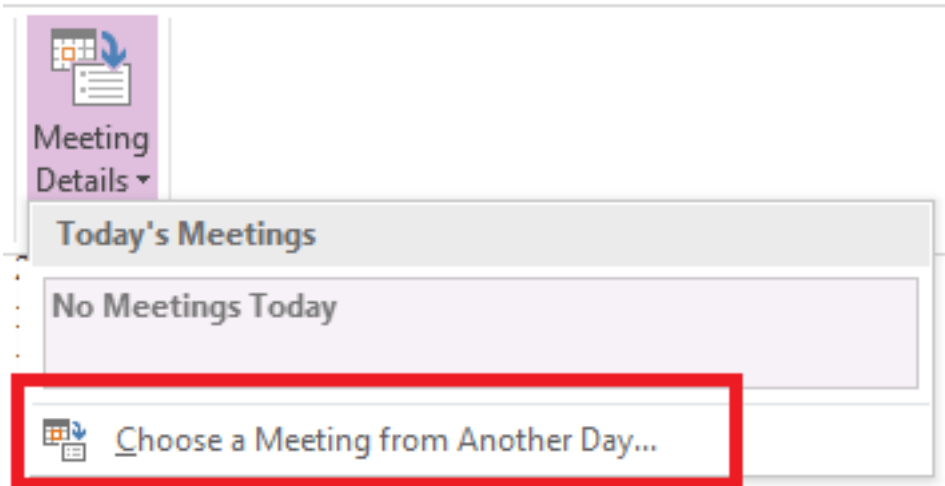


This also works in reverse, but you'll need to install OneNote add-ins into Outlook. Ryan wrote a fantastic [article explaining the process](#) in more detail.

Manage Outlook Meetings

If you have Outlook 2016 and OneNote 2016 installed on the same computer, you can use OneNote to manage, record, and log your meetings. You can include the date, location, agenda, topic, and attendees.

To add a meeting, navigate to **Home > Meeting Details**. You'll be presented with a list of all today's meetings from your Outlook calendar. Click on **Choose a Meeting from Another Day** to alter the date.



Advanced Usage

Now you know about OneNote's basic principles and how to stay organized while using the app. It's time to take a look at some of the app's coolest features.

Embedding Files

You can embed any file directly into OneNote. This is really handy if your **hard drive** is a mess, but it's also a great productivity feature.

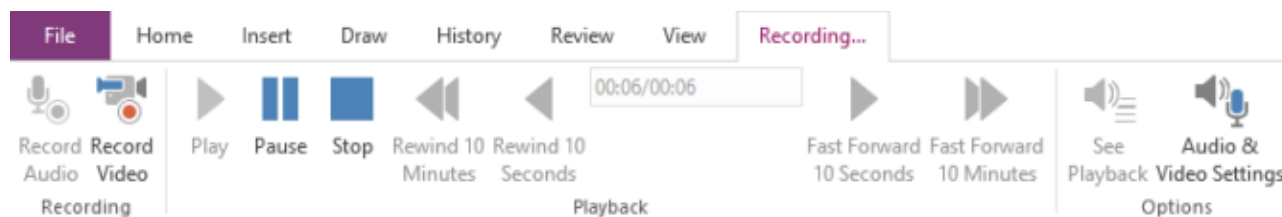
Where it really shines is when you embed Microsoft Excel sheets. You can edit them directly from within OneNote, which is great if you regularly make changes to budgets or other forms.

To insert a file, navigate to the page where you want to embed it and click the **Insert** tab. Choose **File Attachment** to embed any file format, or select **Spreadsheet** to embed an Excel file.

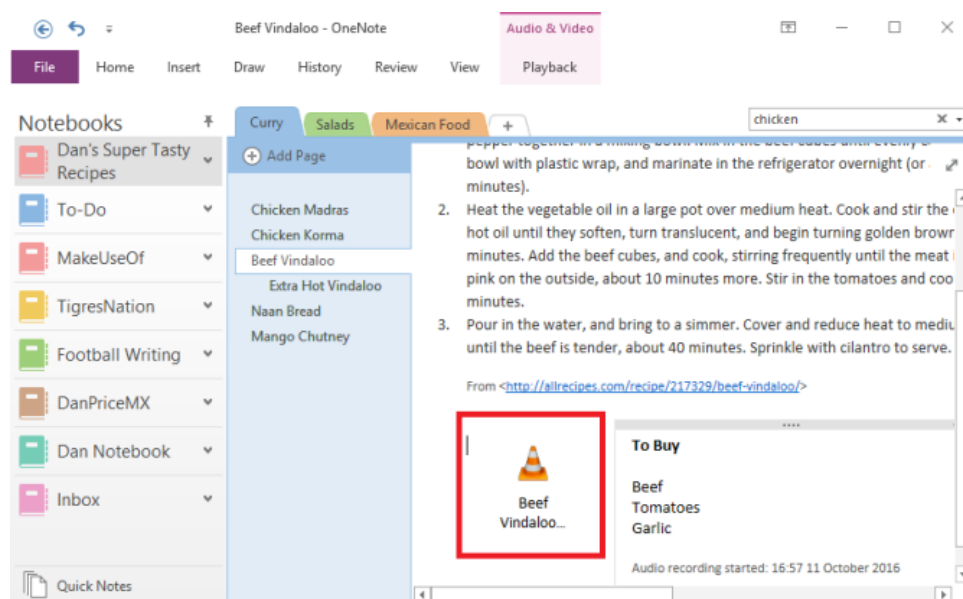


Audio notes

The Insert tab is where you can also add video, audio, screenshots, and tables to your notes. Audio notes are one of the best parts of OneNote.



Just click the **Record Audio** icon and OneNote will start listening. The ribbon will change to give you various audio options. Hit the **Stop** button when you're finished and the audio will automatically save and embed itself into the note.

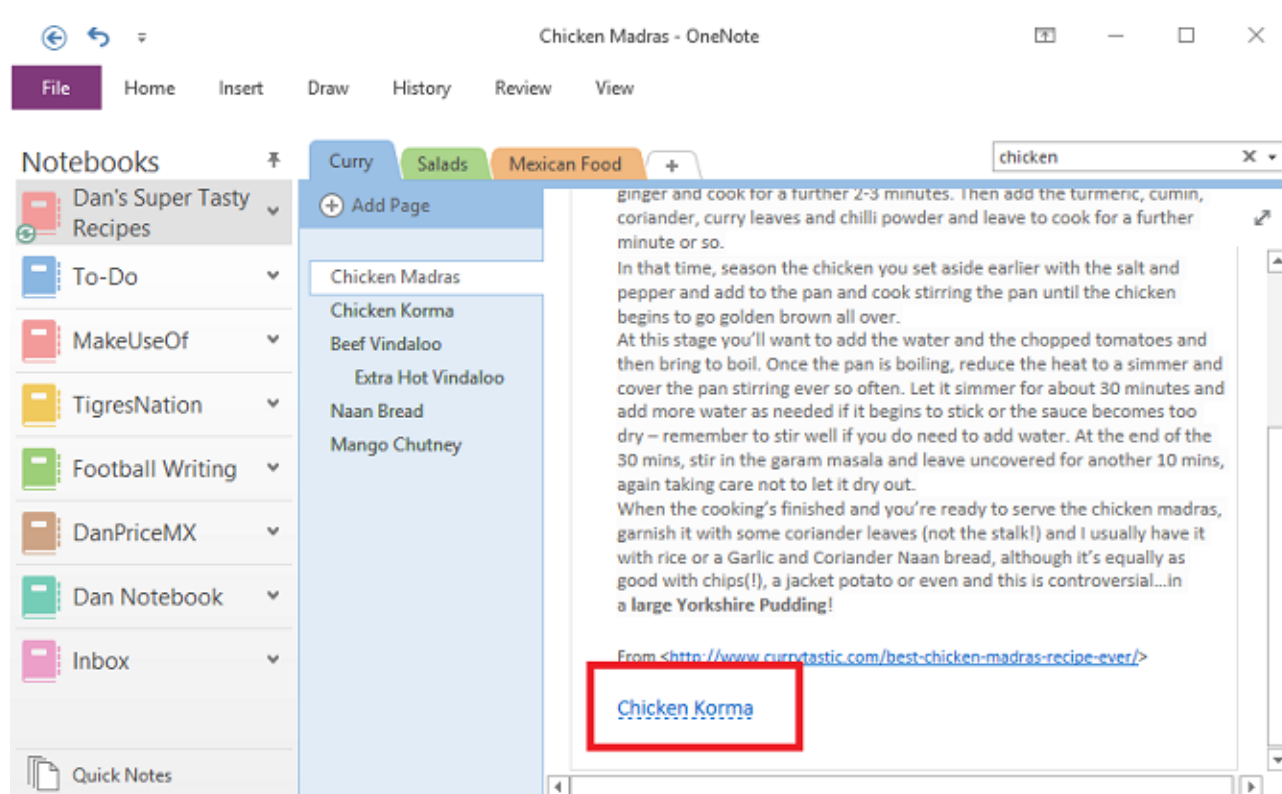


Creating Linked Notes

If you're working on a large project with many notebooks, there is a good chance you'll want to **create links between your notes**. They allow for faster and easier navigation.

Creating links is easy. Go to the page where you want to create the link and put the name of the notebook page you want to link to between a double square bracket.

For example, I might want to create a link between my Chicken Korma and Chicken Madras recipes. I navigate to my Madras note, type **[[Chicken Korma]]**, and the link will automatically appear.

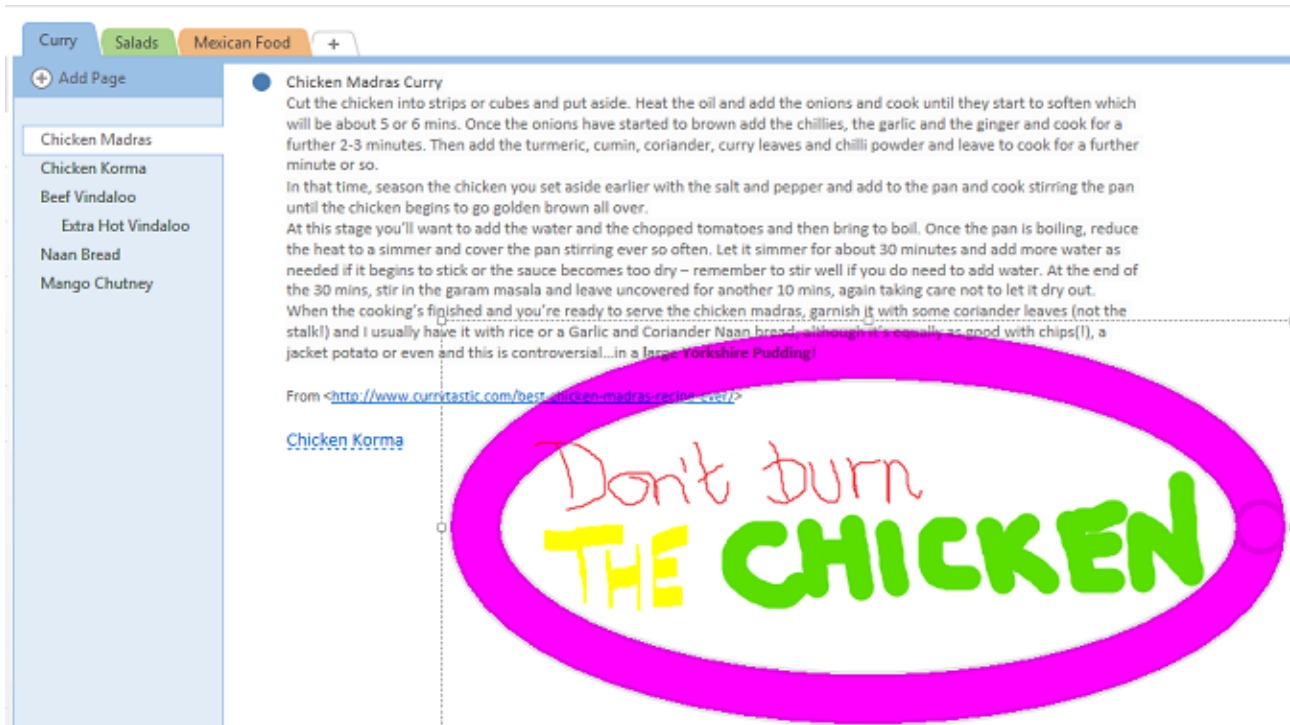


Handwritten Notes

OneNote supports handwritten notes. They are especially useful if you're using the app on a touchscreen device or a **tablet**, but they'll also work with your mouse on a regular computer.



Click on the **Draw** tab to see the available handwriting options. You can choose from multiple colors and pen types, and also find other drawing tools such as shapes, graphs, and charts.



Once you've made your handwritten masterpiece, it's easy to convert it to text. Click on the **Lasso** tool, drag the selection over the handwriting you want to convert, then click on **Ink to Text**.

Math Equations

Remember all your school teachers used to tell you not to rely on a calculator because you wouldn't have one with you all the time in the real world? They clearly didn't see smartphones coming!

But even with smartphones, there are some math calculations that are too long, too complex, or too frustrating to tap out on a tiny screen.

Luckily, **OneNote comes to the rescue**. Type in the equation you want to work out and the app will do the hard work. Make sure you type your sums as one continuous string, or OneNote won't recognize it correctly.

Here are some useful math codes to help you perform your calculations:

Operator	Meaning	Example
+ (plus sign)	Addition	3+3
- (minus sign)	Subtraction Negation	3-1 -1
* (asterisk)	Multiplication	3*3
X (upper- or lowercase)	Multiplication	3x3
/ (forward slash)	Division	3/3
% (percent sign)	Percent	20%
^ (caret)	Exponentiation	3^2
! (exclamation)	Factorial computation	5!

Sharing and Collaborating

If you're **working on a massive project**, there is a good chance you'll want to share a notebook with some of your coworkers.

Head to **File > Share** to set it up. You have two options, either **Share with People** (where you specifically invite people via email) or **Get a Sharing Link** (which gives you a link you can then send to anyone you want).

Share Notebook

Dan's Super Tasty Recipes
Dan Price's OneDrive » ^ .Documents

Share

- Share with People
- Get a Sharing Link

Share with Meeting

Move Notebook

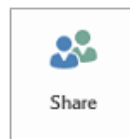
Share with People

Type a name or email address to invite someone

Can edit ▼

Include a personal message with the invitation

Require user to sign in before accessing document.



If you're sharing by email, choose whether you want the recipient to be able to view or edit the notebook from the drop-down menu on the left.

Get a Sharing Link

Sharing Links are useful for sharing with large groups of people, or when you don't know the e-mail addresses of everyone you want to share with

View Link

Anyone with a view link can view this document

Create Link

Edit Link

Anyone with an edit link can edit this document

Create Link

If you're grabbing a link, make sure you click the button next to the appropriate option.

You can also change other users' permissions from this page once they are set up. For an even more drastic approach, delete the entire notebook.

Get a Sharing Link

Sharing Links are useful for sharing with large groups of people, or when you don't know the e-mail addresses of everyone you want to share with

View Link

<https://1drv.ms/u/s!AvDDY-xkqJwUtEpz11Uxilgl7V4V>

Disable Link

Edit Link

https://1drv.ms/u/s!AvDDY-xkqJwUtEp_0HsZJMh2U_

Disable Link

If you don't want to give people permanent access to your notebook but still want to share the contents of a particular page, you can email other users a copy. Click the **Home** tab and choose **Email**.

Keyboard Shortcuts

There are loads of **useful keyboard shortcuts** that can greatly speed up your OneNote experience. These are **“must-knows” for any power user**.

Hundreds of different shortcuts are available – you can find them all on **Microsoft’s help pages**.

Here are my favorite ten:

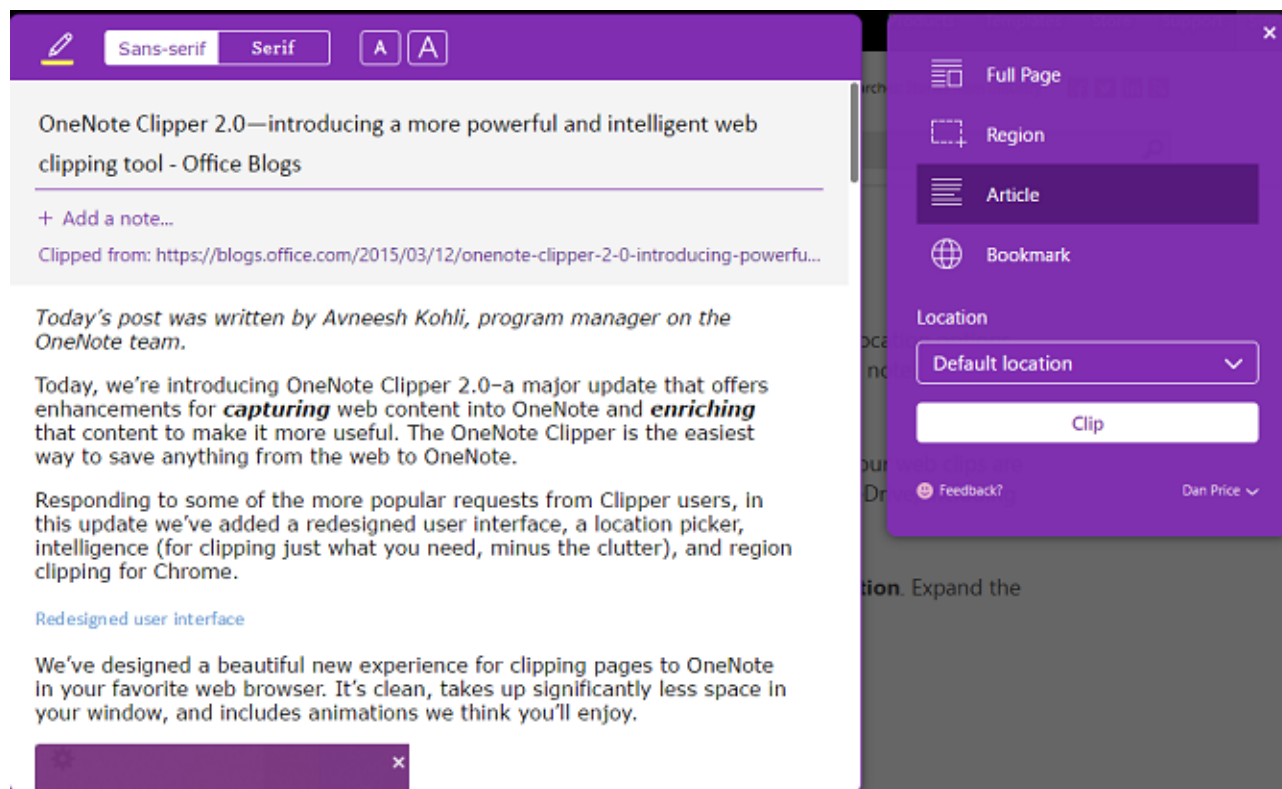
- **CTRL + F** – Search the current page
- **CTRL + E** – Search all notebooks
- **ALT + =** – Type a math equation
- **CTRL + 1** – Add the first tag from your tag list to your current note
- **CTRL + N** – Create a new page in the current section
- **ALT + Left Arrow** – Jump back to your previous OneNote page
- **CTRL + K** – Insert a link (either to another notebook or to a webpage)
- **CTRL + SHIFT + ALT + N** – Create a new subpage below the currently selected page
- **ALT + Down Arrow** – Jump to the next note container on the current page
- **CTRL + ALT + P** – Play a selected audio recording

Webclipper

OneNote boasts a webclipper. It never used to be as powerful as the Evernote offering, but it received an overhaul in 2015 and it's now much more user-friendly. It's available for all the major browsers.

The clipper gives you four options. You can either save the full web page, a region of the web page (like a screenshot), only the text of a page, or a mere bookmark.

You can decide which notebook these clippings are saved into via the drop-down menu.



Troubleshooting

Let's take a look at some common problems you might encounter.

Print Formatting

When you hit print on a notebook, the software does not recognize where the page breaks fall. This is due to the "type anywhere" nature of the app. You might find that some single lines of text will be split over two pages.

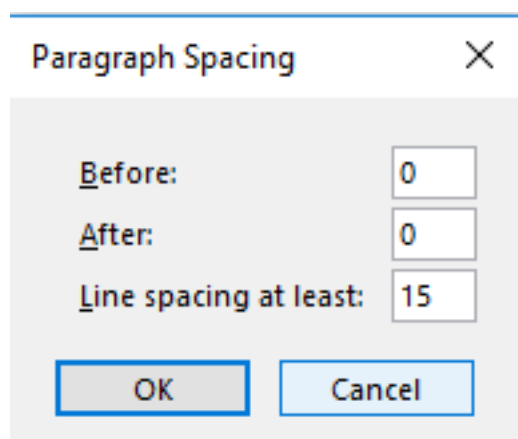
As mentioned earlier - OneNote is not a word processor. If you desperately need to print out your notes, the best solution is to first paste them into Microsoft Word or Notepad and fix the formatting to your liking.

Go to **File > Print > Print Preview** to check how your printed notes will look.

Text Formatting

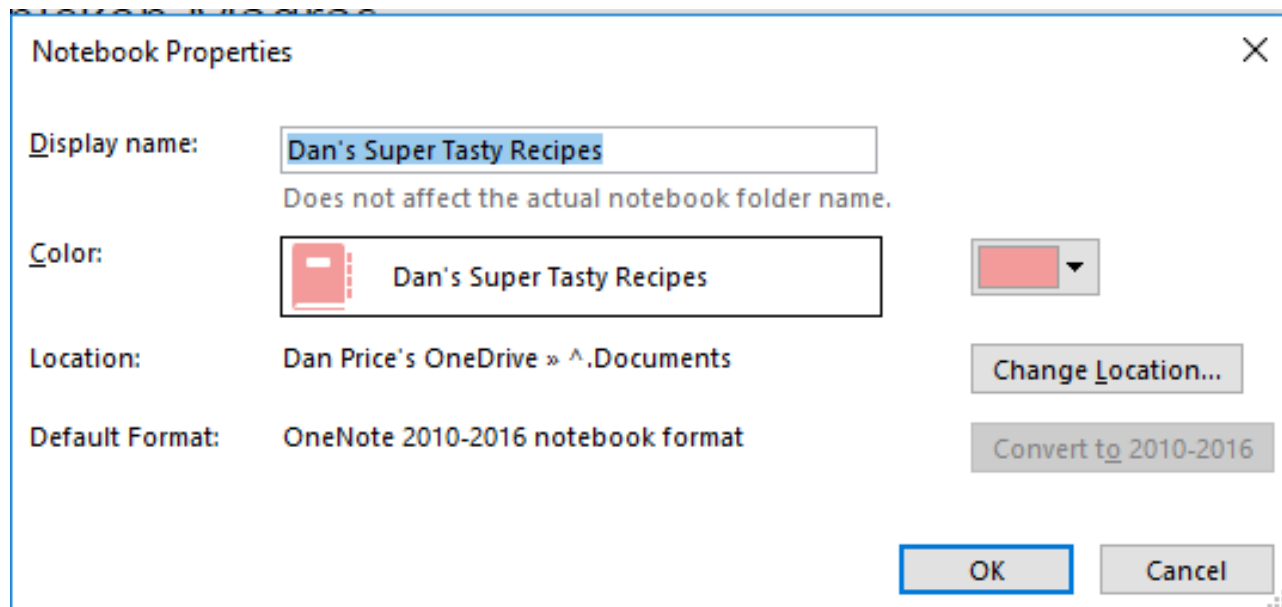
Again, because OneNote is not a word processor, it does not use word processing principles. Instead, it uses typography principles. This can be confusing for a new user.

For example, if you try and double the line spacing in the **Paragraph Spacing** options by entering a "2", nothing will happen. You need to enter the total number of points for the font size and line spacing you want to achieve. This is called *leading* in typography.



OneDrive Notebook Titles Do Not Update

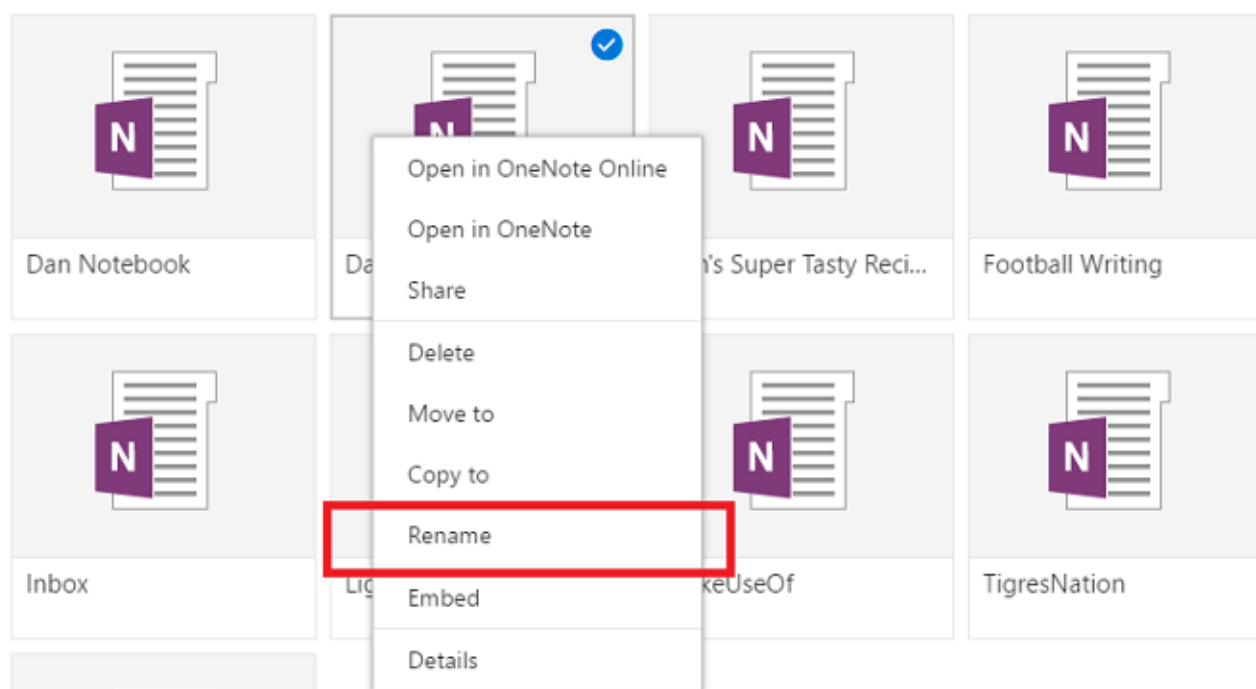
You can change the display name of a notebook by right-clicking on it and selecting **Properties**. However, doing this will not update the actual file name in OneDrive.



Having mismatched file names doesn't affect how OneNote operates. But if you're an organization freak or have lots of notebooks, it's best to make sure the filenames reflect the notebook.

To change them head to **OneDrive > Documents** and right-click on the notebook to rename it. You can double click each notebook and open it in the web app if you're not sure which is which.

Files > Documents





Recover Deleted Notes

We've all done it – you accidentally hit delete on a file, only to realize a week later that it was a horrific error. Luckily, **OneNote keeps some backups**. As long as you realize your mistake fast enough nothing should be lost forever.

If the notebook was saved on a local drive, you can head to **File > Info > Open Backups** and restore your lost files. If the notebook was saved on OneDrive, log into your OneDrive account and navigate to **History > Notebook Recycle Bin > Notebook Recycle Bin**. Backups are kept for 60 days unless the bin was emptied during that time.

What Have We Missed?

OneNote is such a vast and feature-packed app that this guide has barely scratched the surface. There are so many **cool tricks and tips** that I could write a whole book and still not get through them all. But I hope I've given you a good start and introduced you to some of the software's power.

As always, I'd love to hear your feedback and opinions. What important tools and tricks did I overlook? Is there a vital feature that I didn't include?

I'd also love to help you develop your OneNote skills. Is there something you're struggling with? Did some aspects of the guide confuse you?

Get in touch with your comments and questions in the **comments section**.

Read more stories like this at

