



OneNote

[Your Company Name]

CustomGuide
Interactive Training

EVALUATION ONLY

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The Fundamentals

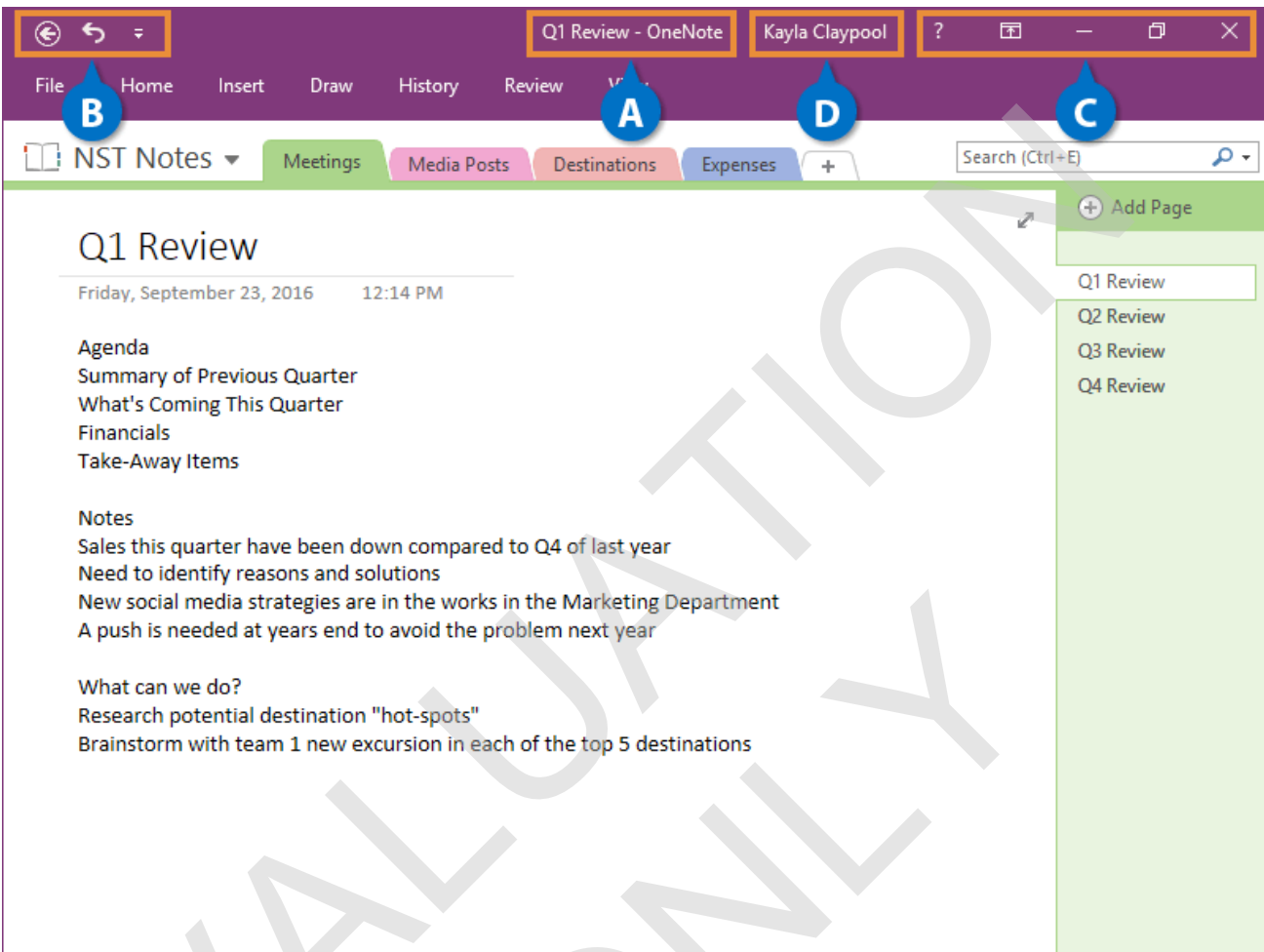
If you attend a lot of meetings where you need to take notes, OneNote is a helpful program to use. OneNote is Microsoft's notetaking software that collects typed or written notes, drawings, tables, and screen clippings. OneNote is like a digital notepad but is much more organized. Instead of having to flip through each note to find what you're looking for, OneNote saves notes in pages which are organized into sections within notebooks. OneNote is a very collaborative program and notes can be shared with other OneNote users.

This module is an introduction to working with OneNote. You'll learn about the main parts of the program screen, how to give commands, and how to use help.

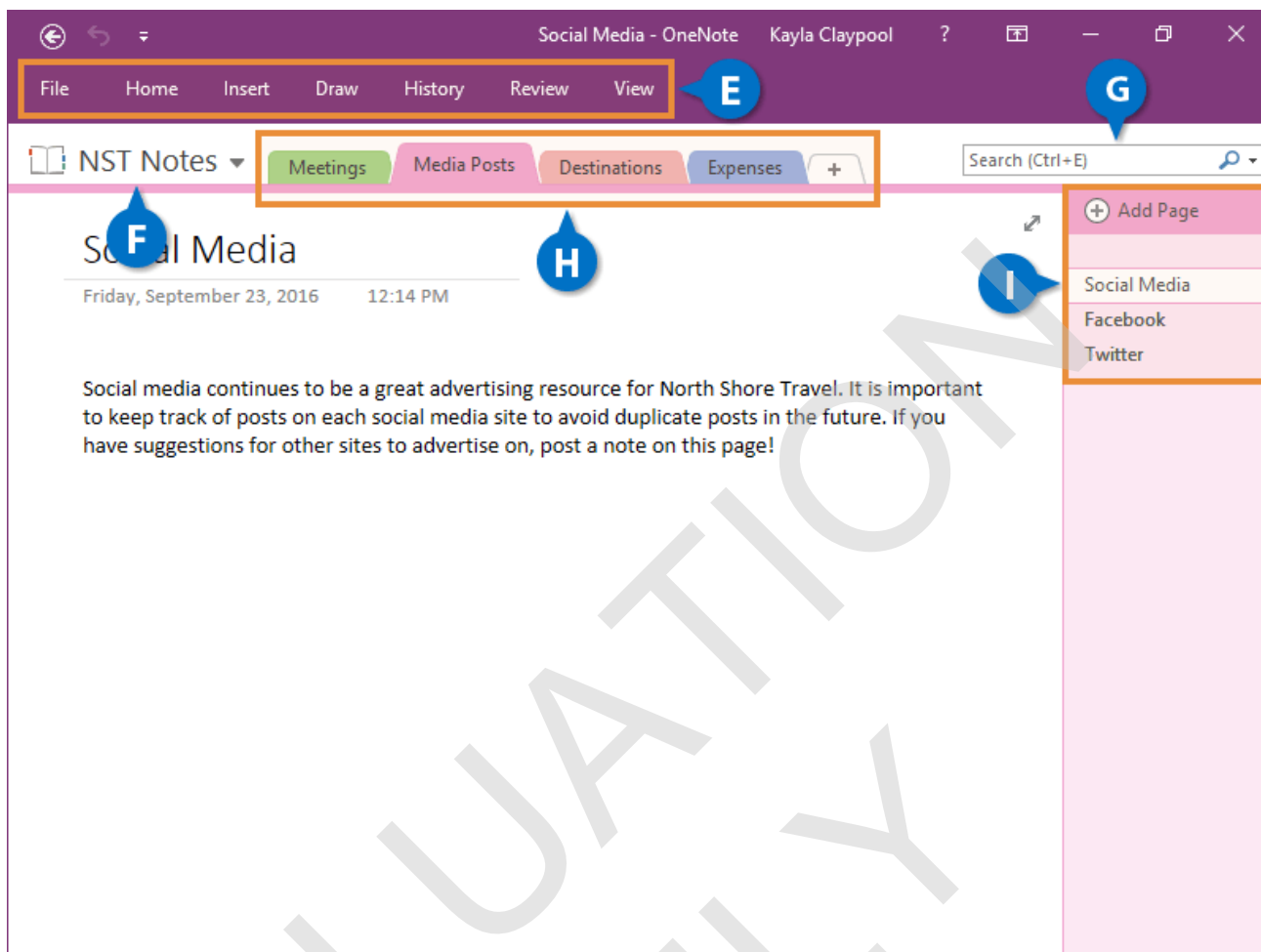
Objectives

- Understand the Screen
- The Quick Access Toolbar
- Change Views
- Search Notes
- Print
- Help

Understand the Screen



A	Title Bar: Displays the name of the current file.	C Help/Display Options: Here you can see the help feature, change how much of the ribbon is displayed, minimize, maximize or restore the screen, or close Excel altogether.
B	Quick Access Toolbar: This is a fast way to access the most used features.	D Microsoft Account User Info: When you log in with your Microsoft account, your name and picture appear here.



E	The Ribbon: This is where you'll find all the options you need to create, format, and organize your notes. It's collapsed by default in OneNote, so just click a tab to expand it and see the options.	H	Notebook Sections: Each subject is separated by a tab. Click a tab to jump to a different section.
F	Active Notebook: This is where you'll find the name of the current Notebook.	I	Notebook Pages: Each page in a section is listed at the right. Click a page to view its content.
G	Search Field: The search field lets you search for specific text within a page, section, notebook, or all open notebooks.		

The Quick Access Toolbar

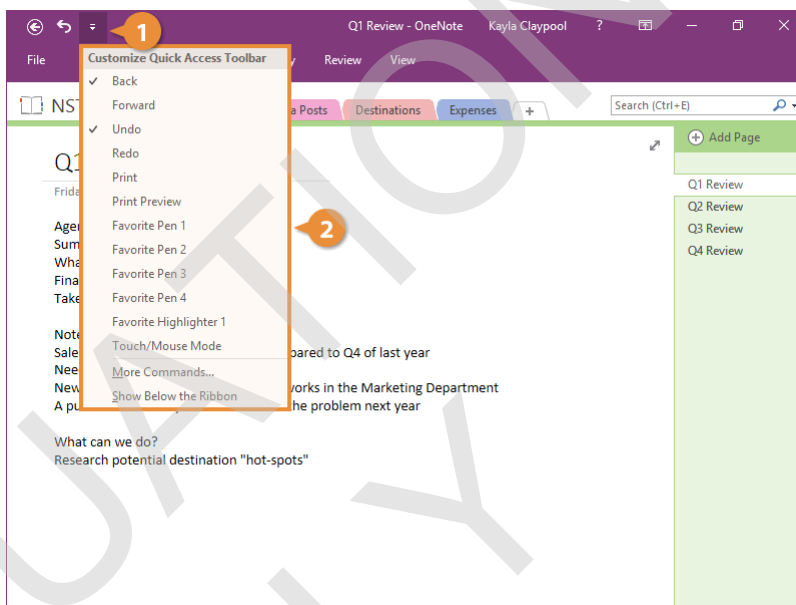
The Quick Access Toolbar holds a few buttons for commands that you'll use often, such as back and undo. You'll notice there is no save button like in other programs, and that's because OneNote saves everything automatically. There's no need to ever save manually!

Customize the Quick Access Toolbar

- 1 Click the **Customize Quick Access Toolbar** button.

This list displays some common commands you can add. But if you don't see the one you need, you can click **More Commands** and find it in the dialog box.

- 2 Select a command to add.



Change Views

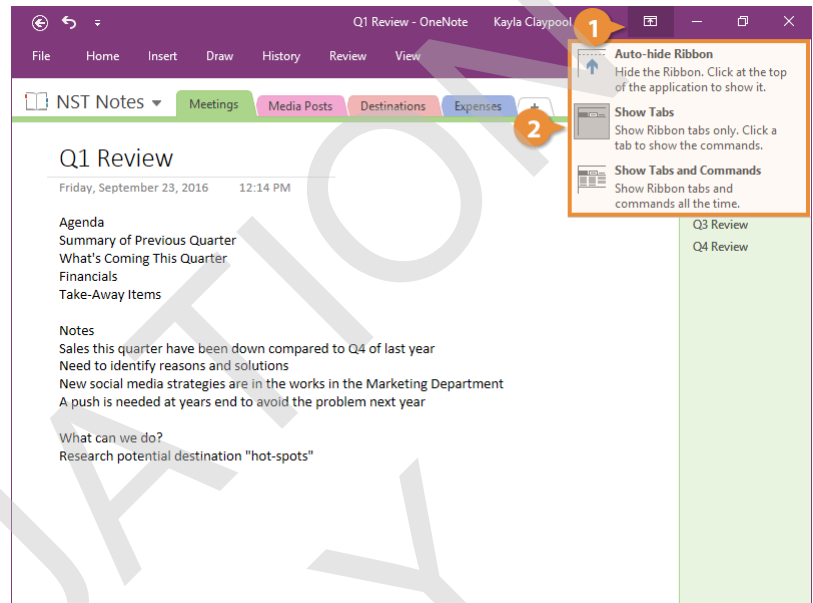
There are a few different view options you can change in OneNote to make note-taking more efficient.

Ribbon Views

- 1 Click the **Ribbon Display Options** button.

Show Tabs is the default view. If you want to hide all of the ribbon, you'd choose Auto-hide Ribbon.

- 2 Select a display option.

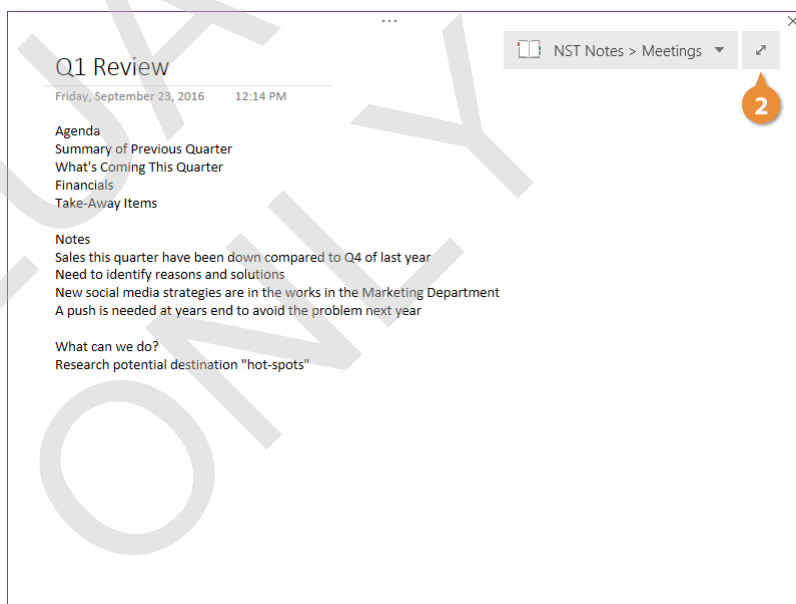
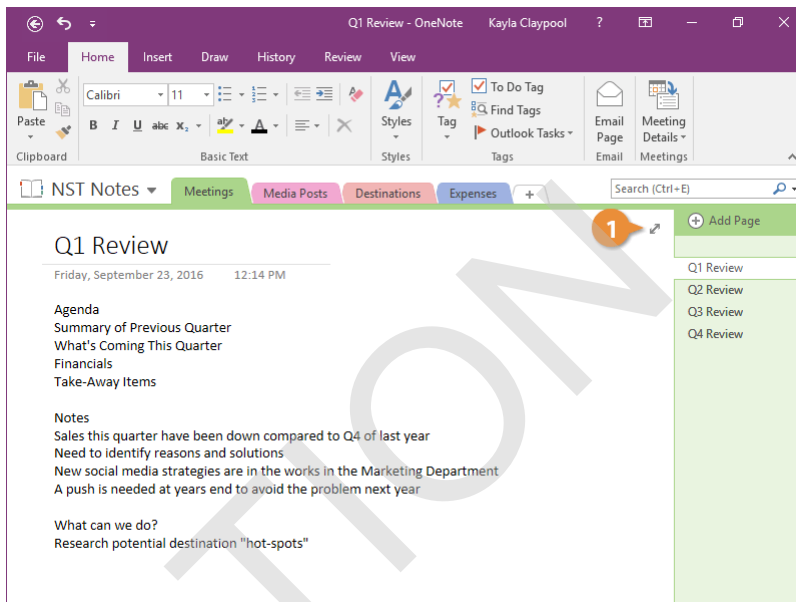


Notebook Views

- 1 Click the **Full Page View** button.

Everything else is collapsed to give you more note-taking space.

- 2 Click the **Normal View** button.



View options can also be found on the View tab.

3

Click the **View** tab.

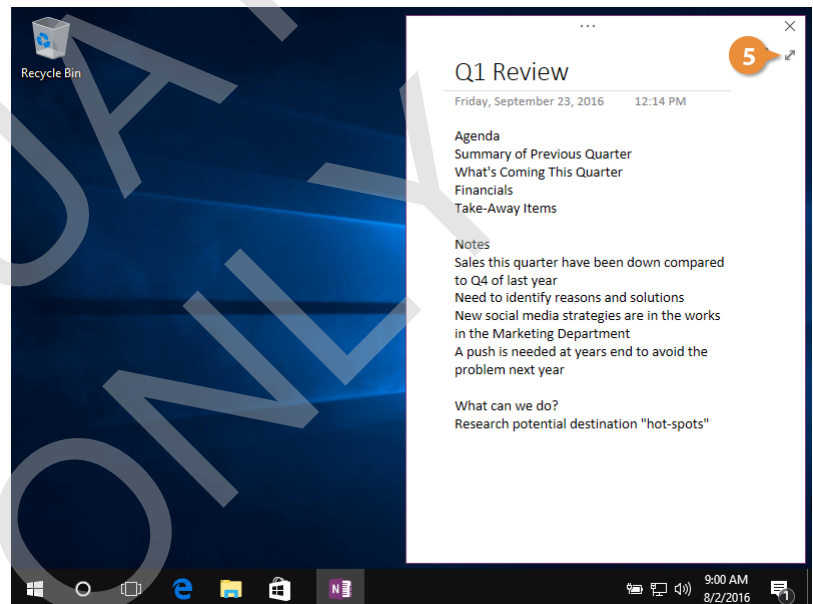
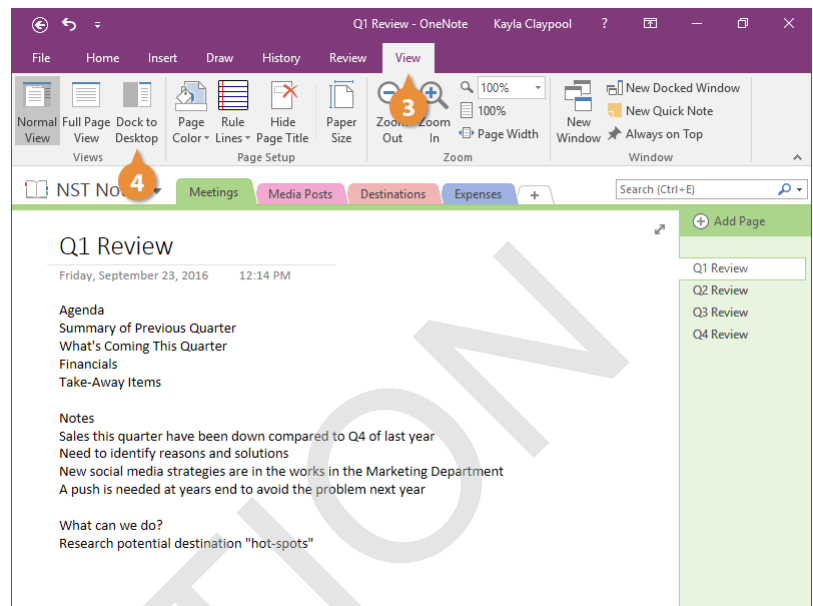
4

Click **Dock to Desktop**.

The OneNote window is docked to one side of the screen so you can easily work in another program at the same time.

5

Click the **Normal View** button.

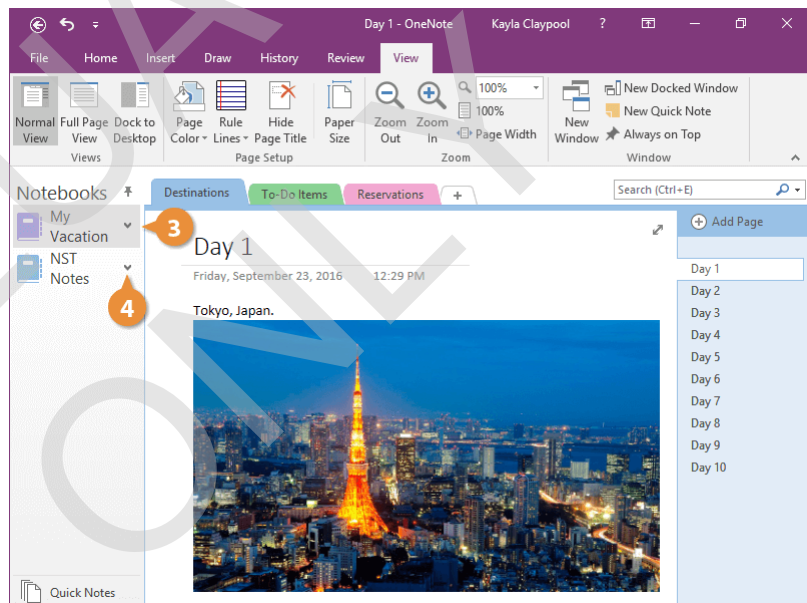
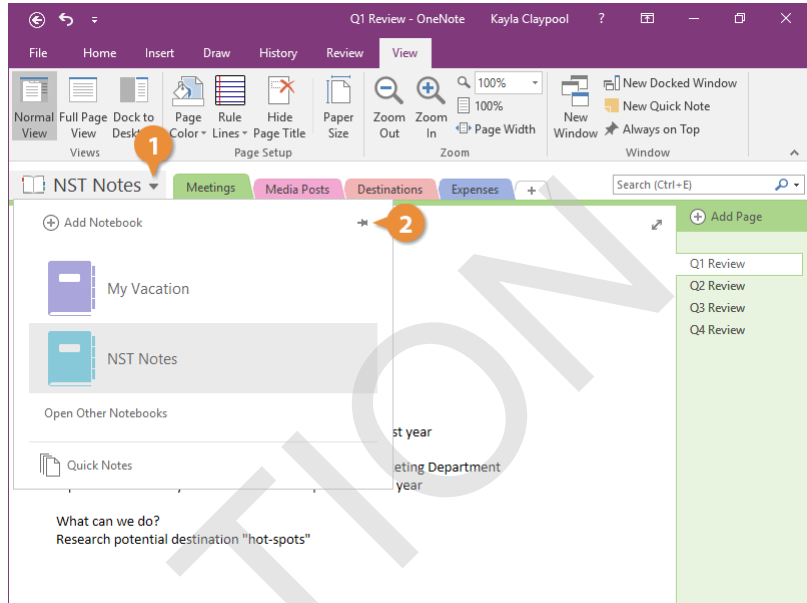


Notebook Pane

- 1 Click the **Notebook** list arrow.
- 2 Click the **Pin Notebook Pane to Side** button.

Now the Notebook pane stays open on the left so you can easily see all of your open notebooks and quickly switch between them.

- 3 Select a notebook from the pane.
- 4 Click a notebook's list arrow.

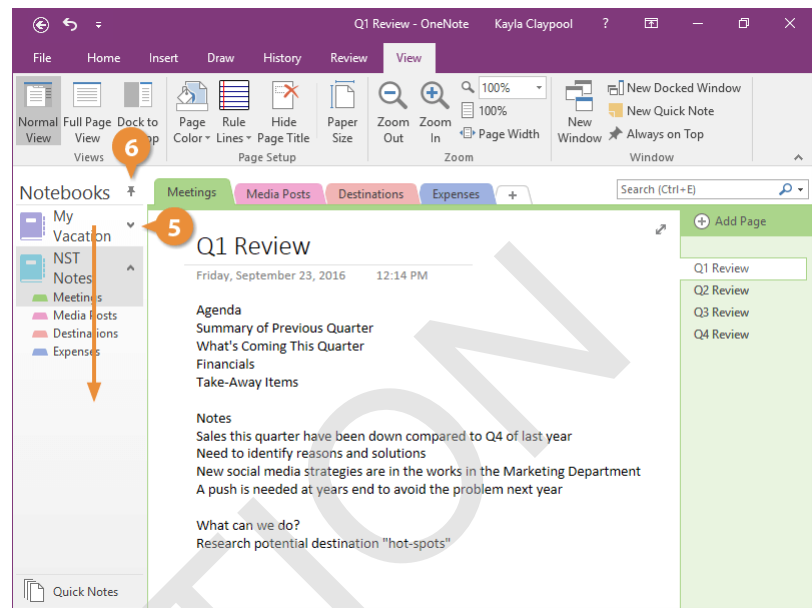


5

Click a notebook and drag it to a new location.

6

Click the **Unpin Notebook Pane to Side** button.



Search Notes

Trying to find where you put a specific note can be a daunting task! Luckily, OneNote has some pretty powerful search capabilities to help you find just what you're looking for.

- 1 Click in the **Search** field and type something you're looking for.

OneNote automatically starts searching all open notebooks and shows which notebook contains a match, as well as the section.

- 2 Click the **Search** list arrow.

You can then search a specific location.

- 3 Select a search option.

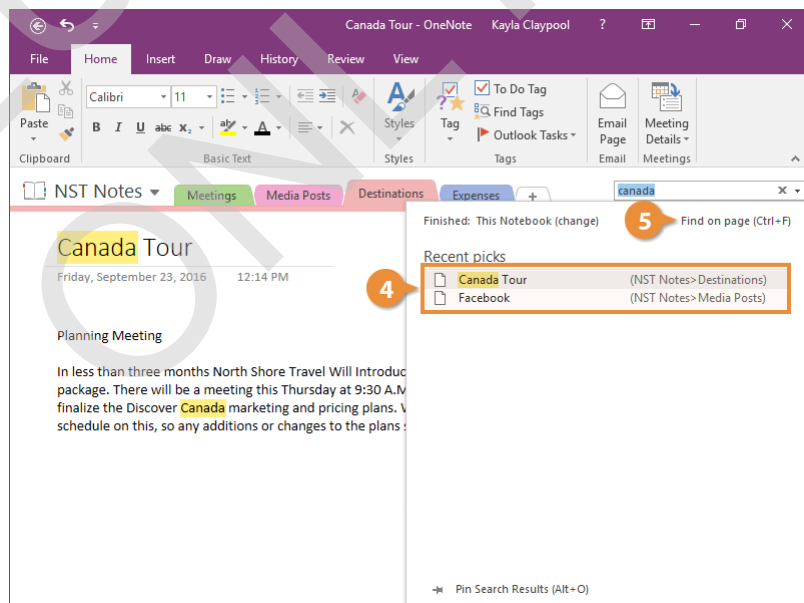
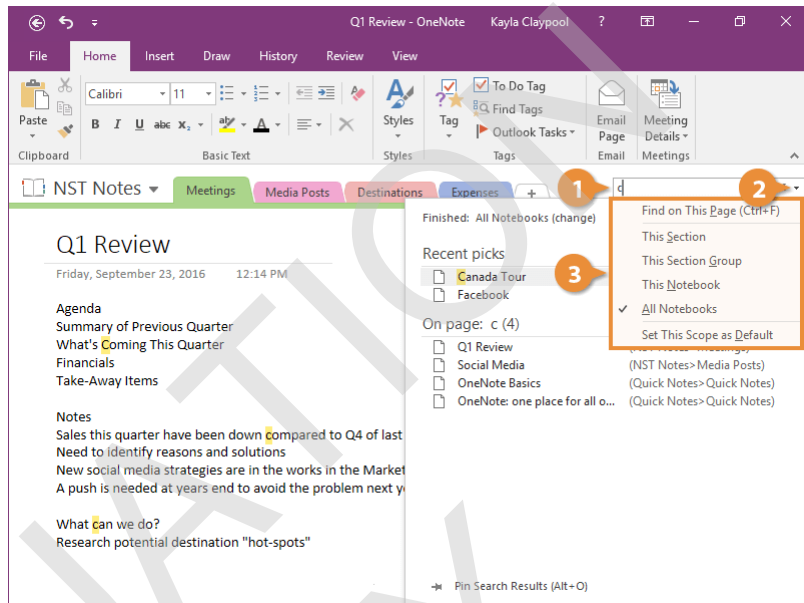
- 4 Select a search result.

You jump to the page that contains the term and it's highlighted here. OneNote also finds results in images and even hand-written notes, if you write clearly enough.

- 5 Click **Find on page**.

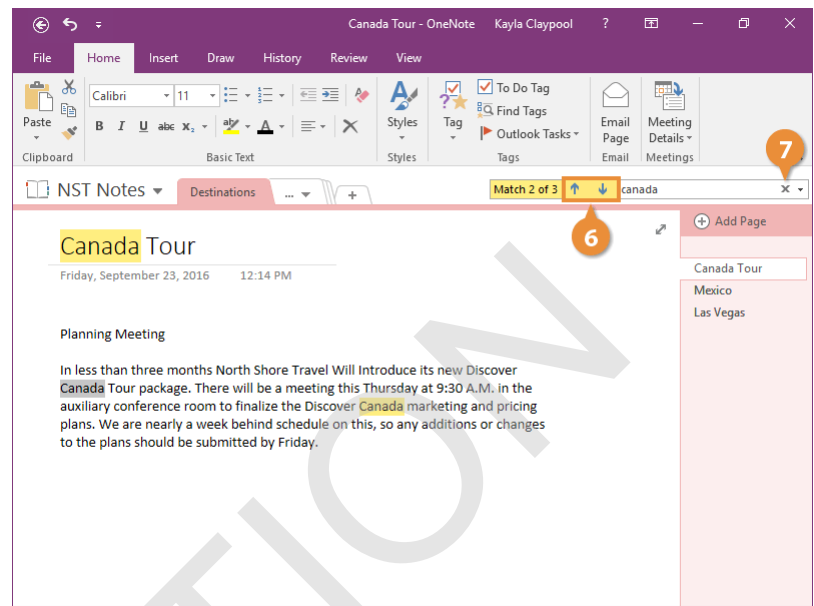
This is helpful when there are multiple instances of the word on a single page.

Shortcut: Ctrl + F.



- 6 Click a **Search** arrow.
- 7 Click the **Clear Search** button.

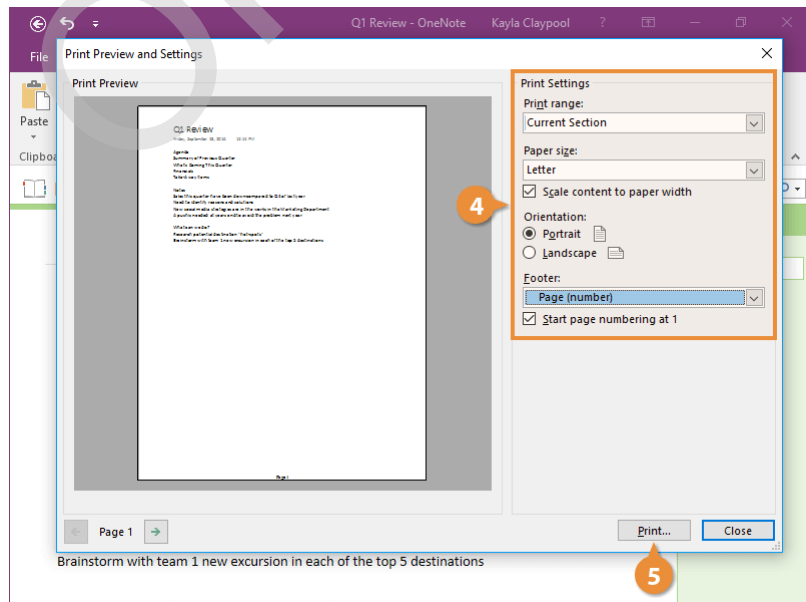
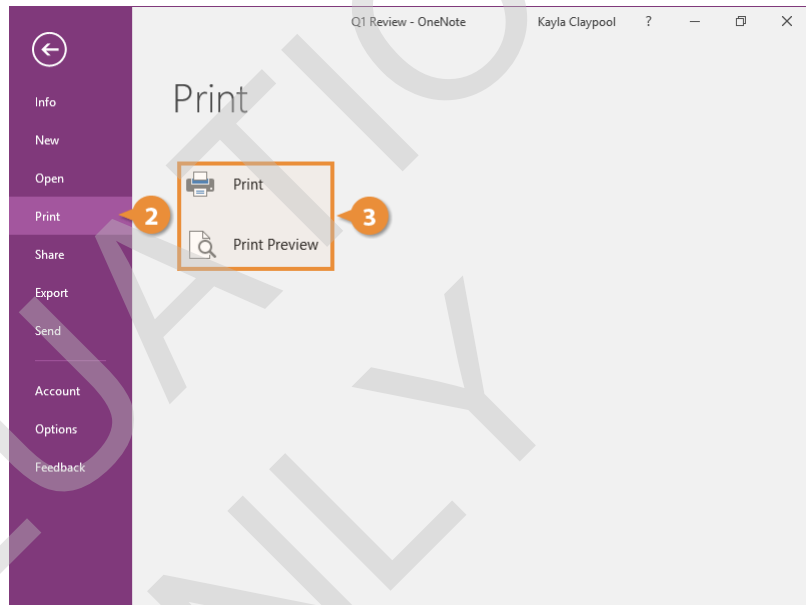
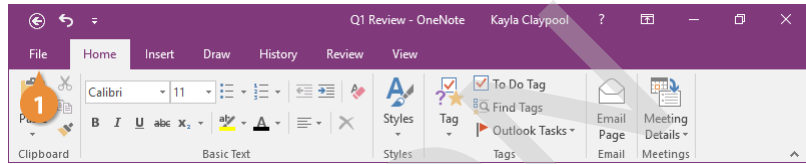
And the search is cleared.



Print

It's nice to have all your notes in electronic form in one location, but there will probably be times when you also need to print them out. Let's see how!

- 1 Click the **File** tab.
- 2 Click **Print**.
- 3 Select a print option.
 - **Print:** Send the document straight to the printer.
 - **Print Preview:** Check the preview to make sure it looks correct before printing.
- 4 Set the print preferences as necessary.
- 5 Click **Print**.

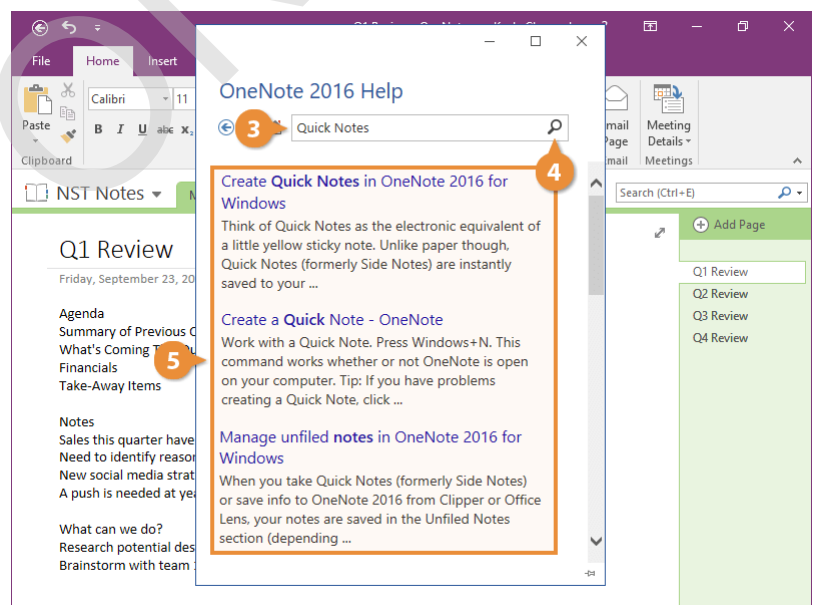
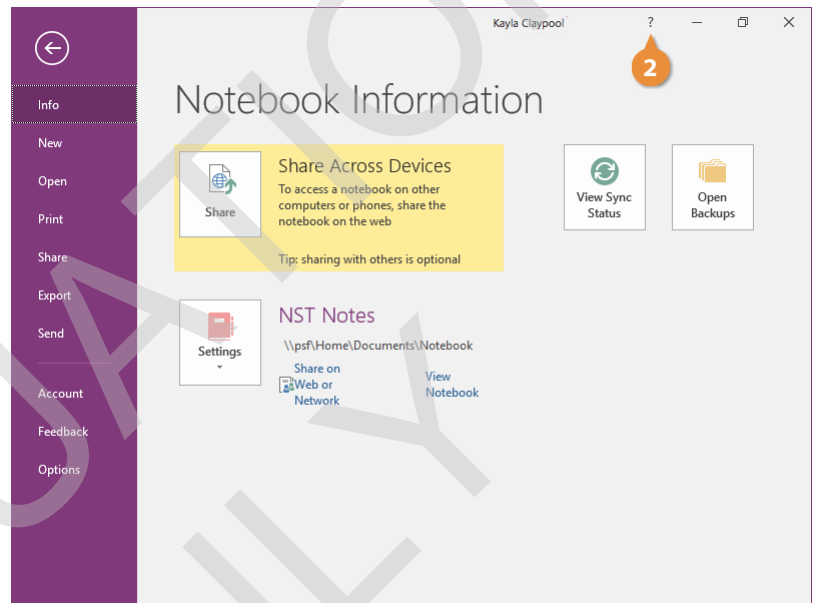
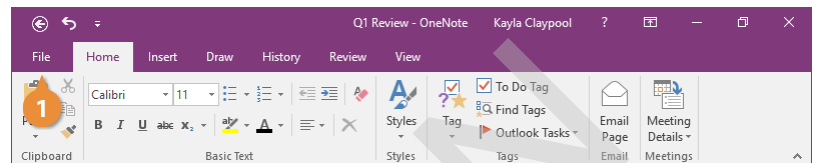


Help

If you come across a task in OneNote that you don't know how to complete, use the help feature!

- 1 Click the **File** tab.
- 2 Click the **Help** icon.
- 3 Select a topic or click in the **Search** box.
- 4 Type a topic and click the **Search** icon.
- 5 Select a related help topic.

You jump straight to the topic you really need.



Notebook Basics

While OneNote has plenty of additional features, its main function is to take notes. This means that writing and organizing notes is its primary focus.

In this module, you'll learn the basics of inserting and editing text. You'll learn how to create notes, how to organize your notes into sections, section groups, pages, and subpages. You will also learn how to view and modify your notebook properties, use the recycle bin, and how to access backup copies of your notebooks.

Objectives

Open and Create

Close, Exit, and Delete

Sections

Section Groups

Pages and Subpages

Notebook Properties

Recycle Bin

Notebook Backup

Open and Create

While you can open a notebook by double-clicking its icon in Windows, you can also browse and open files from right within OneNote.

Open an Existing Notebook

1 Click the **File** tab.

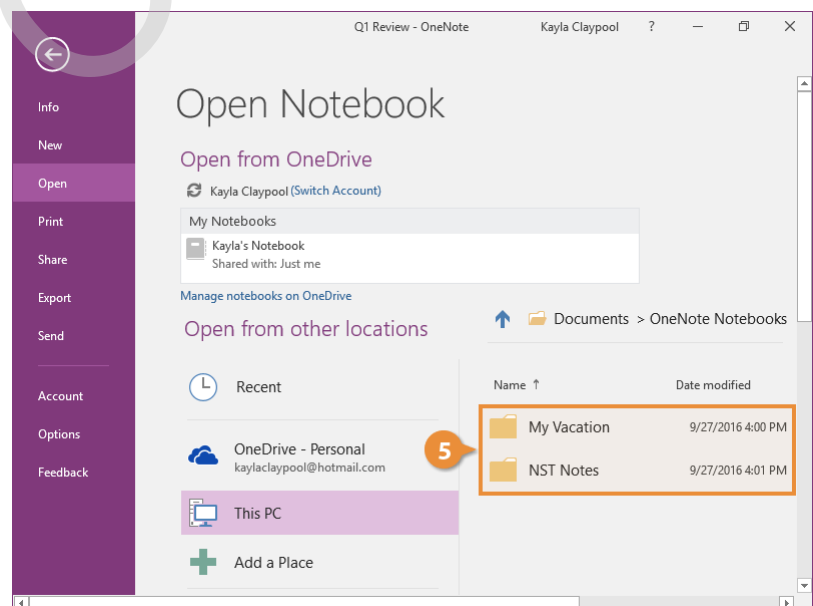
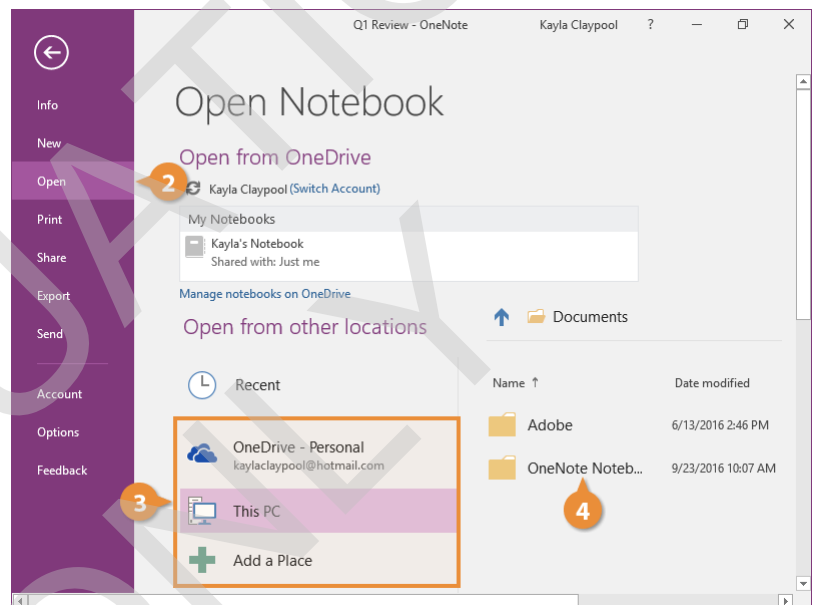
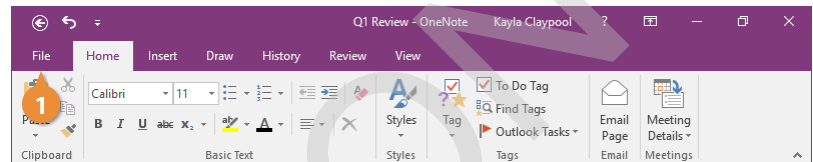
2 Click **Open**.

Since we are logged in with a Microsoft account, any notebooks saved to OneDrive show up here. You can open a recent notebook, or find one saved on your hard drive by clicking This PC.

3 Select a save location.

4 Select the folder where the notebook is saved.

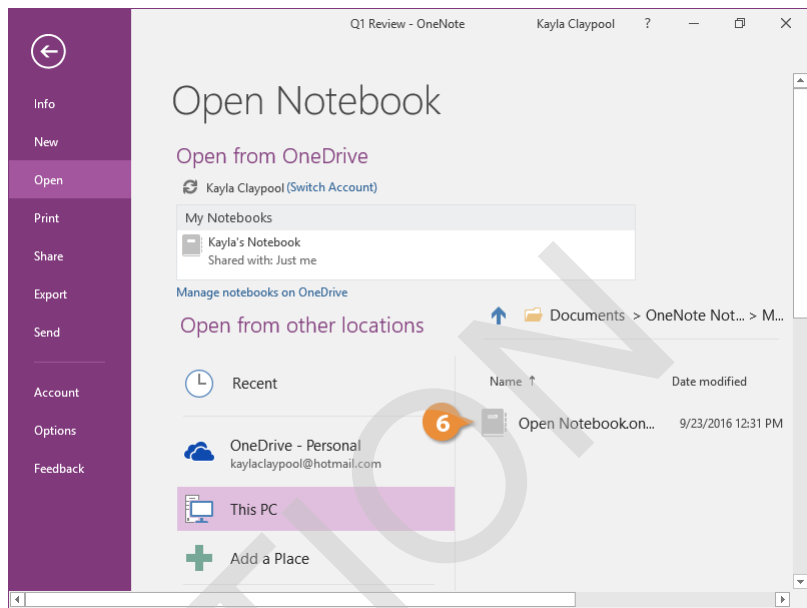
5 Open a notebook folder.



6

Select **Open Notebook**.

The notebook opens and you're ready to start adding notes.

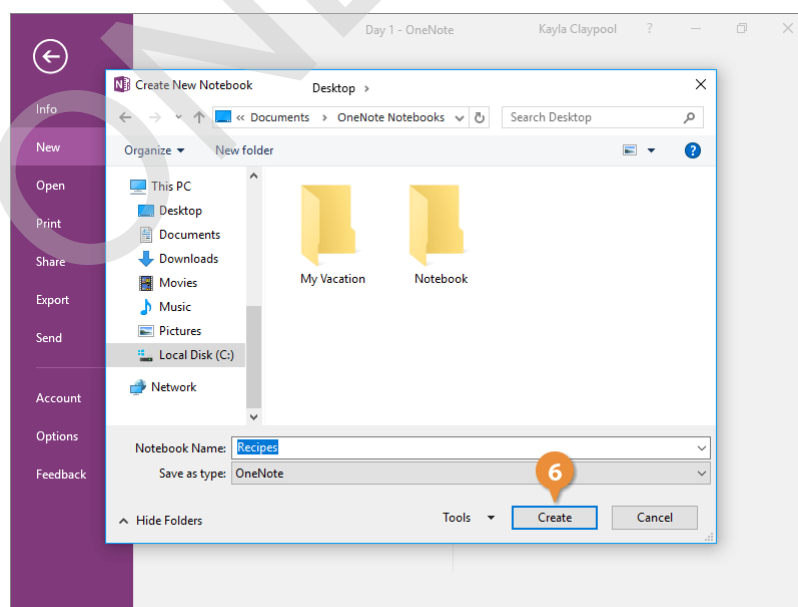
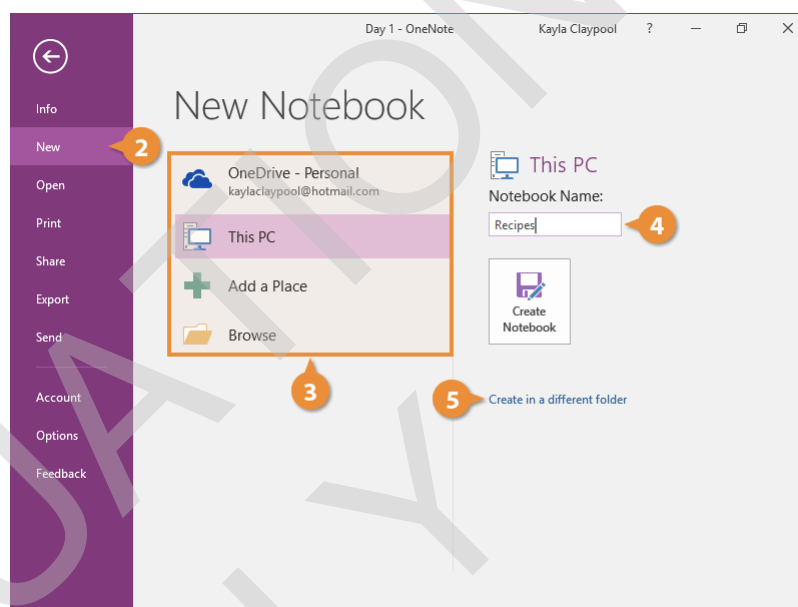
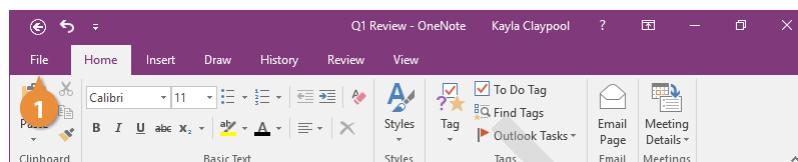


Create a New Notebook

If you don't already have a saved notebook to work in, create a new one.

- 1 Click the **File** tab.
- 2 Click **New**.
Now you need to specify where to save the new notebook. OneDrive is the default.
- 3 Select a save location.
- 4 Click in the **Notebook Name** field and type a notebook name.
- 5 Click **Create in a different folder**.
You can just click Create Notebook to save in the default location.
- 6 Click **Create**.

The new notebook is created, and any changes are automatically saved in the location you selected.



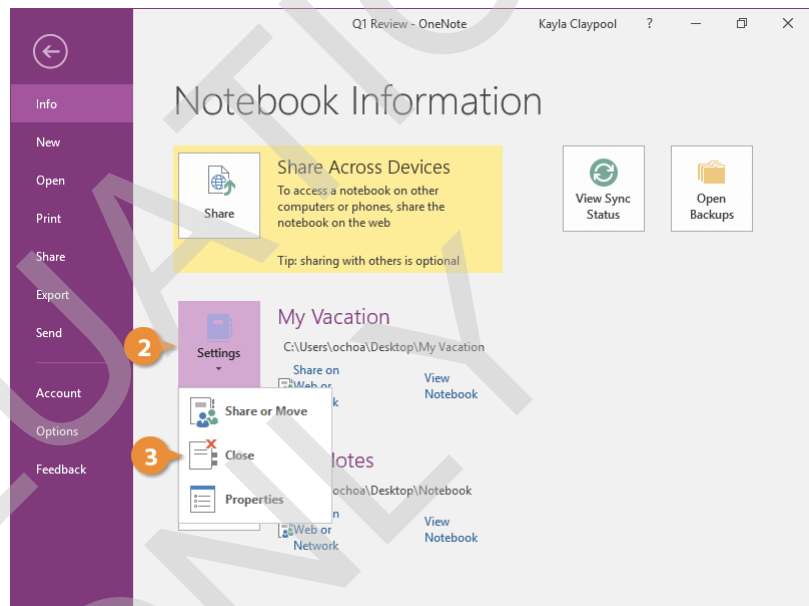
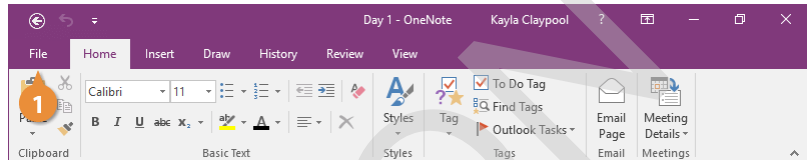
Close, Exit, and Delete

Close a Notebook

When you're done working in a notebook, it's a good idea to close it.

- 1 Click the **File** tab.
- 2 Click the **Settings** button next to the workbook you want to close.
- 3 Select **Close**.

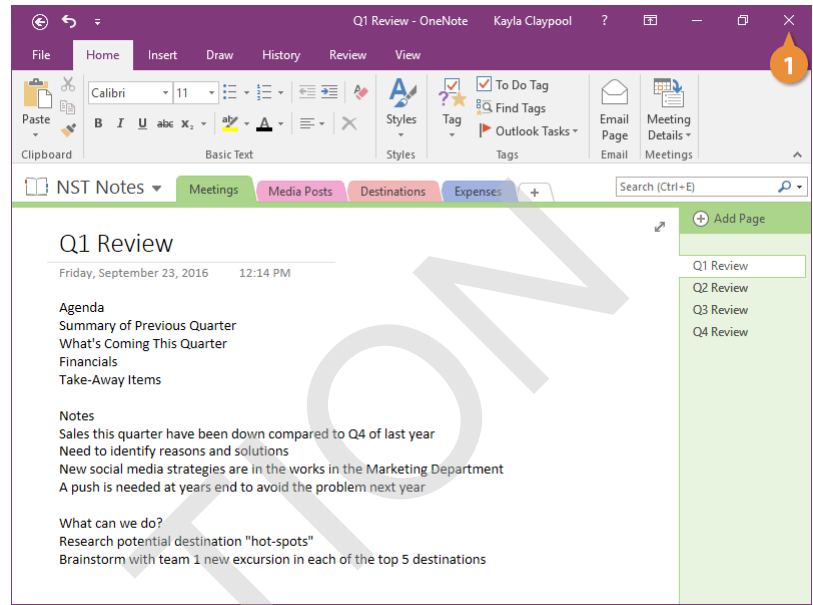
And just that notebook closes.



Exit OneNote

- 1 Click the **Close** button.

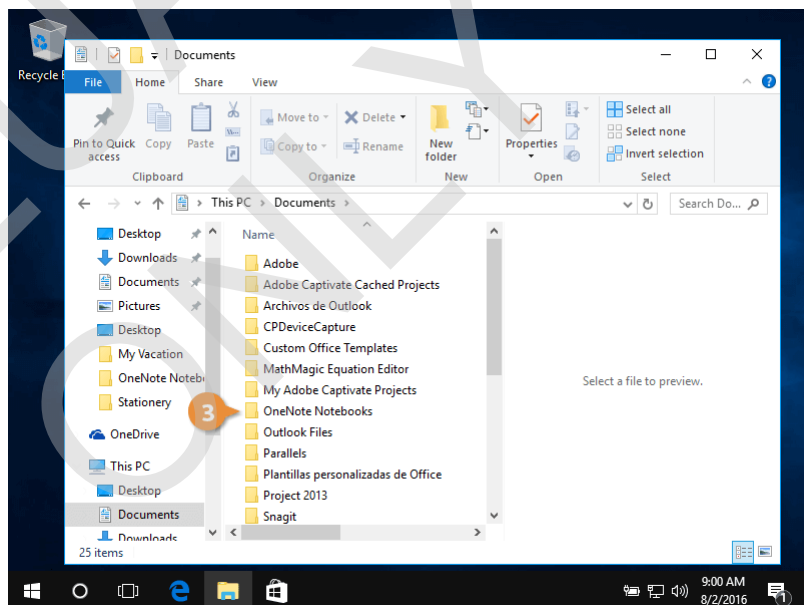
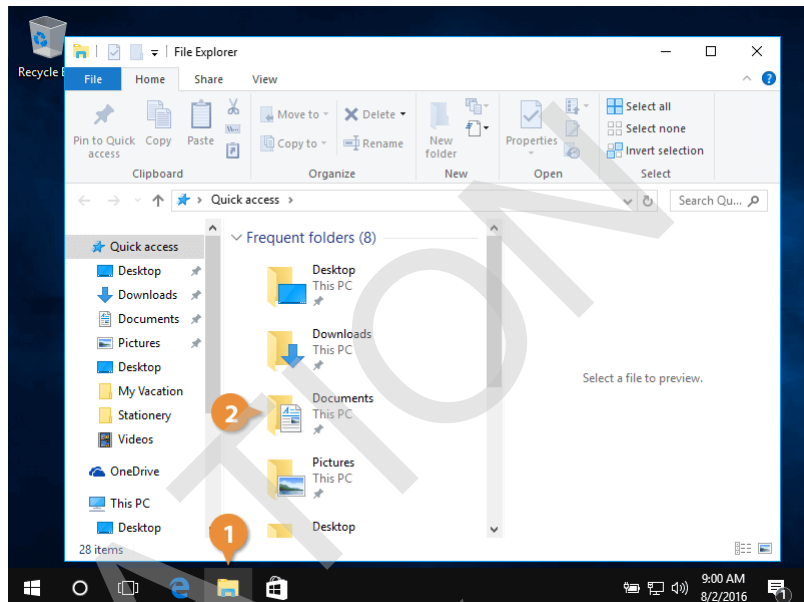
The entire program is closed and you're brought back to the desktop.



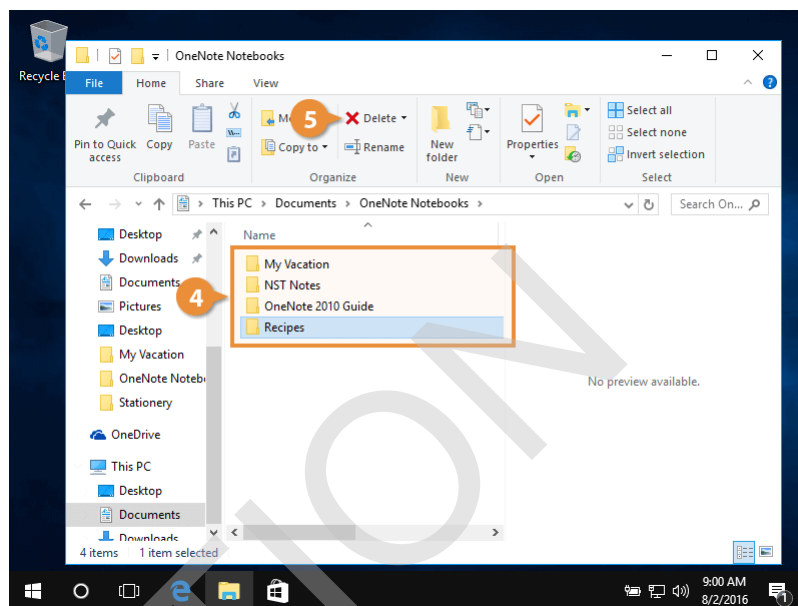
Delete a Notebook

If you're done with a notebook and know you won't ever need it again, delete it.

- 1 Open File Explorer.
- 2 Navigate to **Documents**.
- 3 Open the **OneNote Notebooks** folder.



- 4 Select a Notebook.
- 5 Click **Delete**.



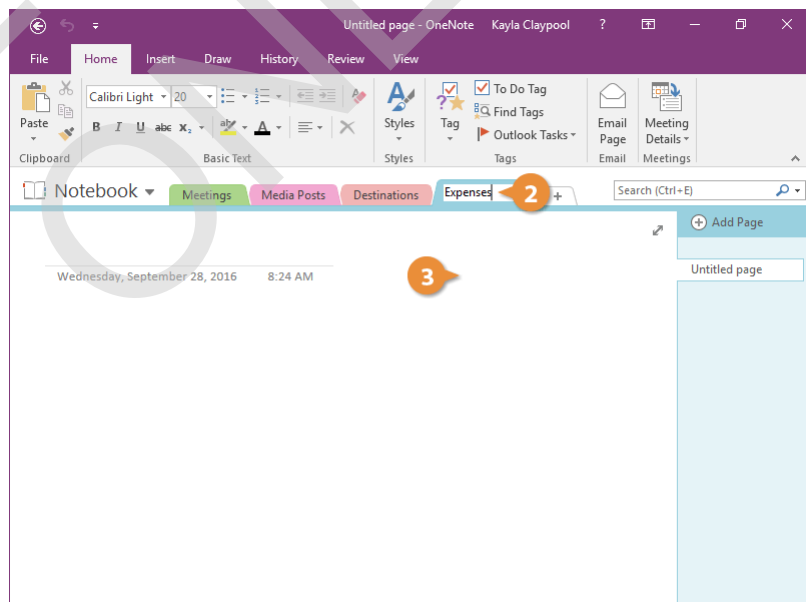
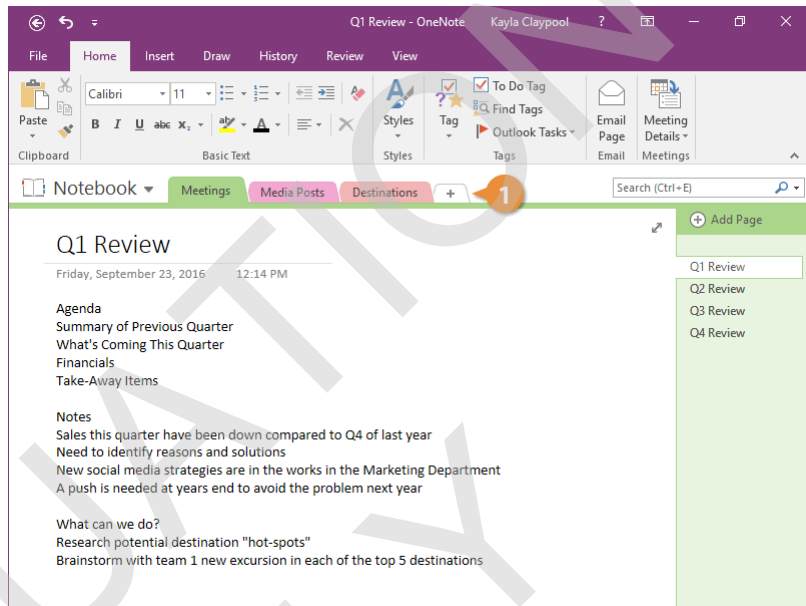
Sections

When you think about a multi-subject notebook, it has sections that are divided by tabs. OneNote also has section tabs, at the top of a page, that are used to organize your notes.

Add a Section

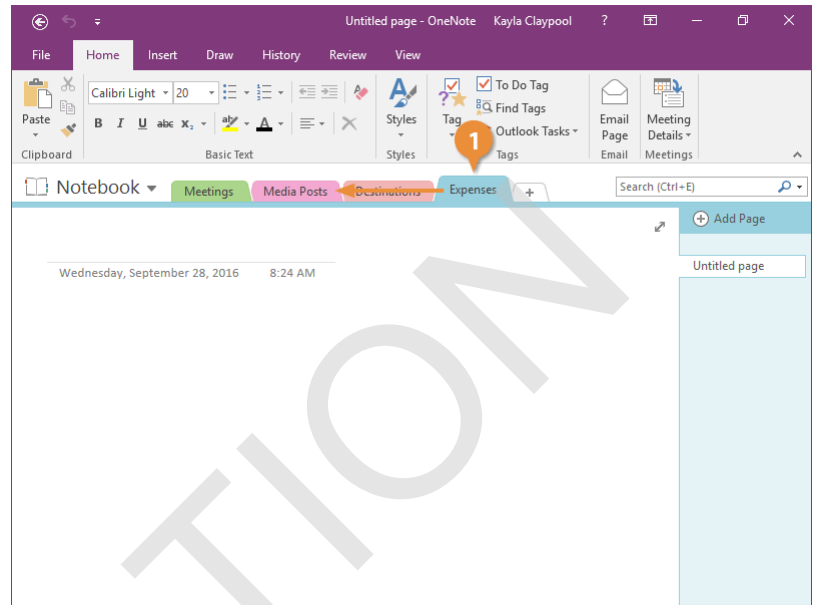
- 1 Click the **Create New Section** button.
- 2 Type a section name.
- 3 Click outside the tab.

The new tab is created and OneNote assigns it a color.



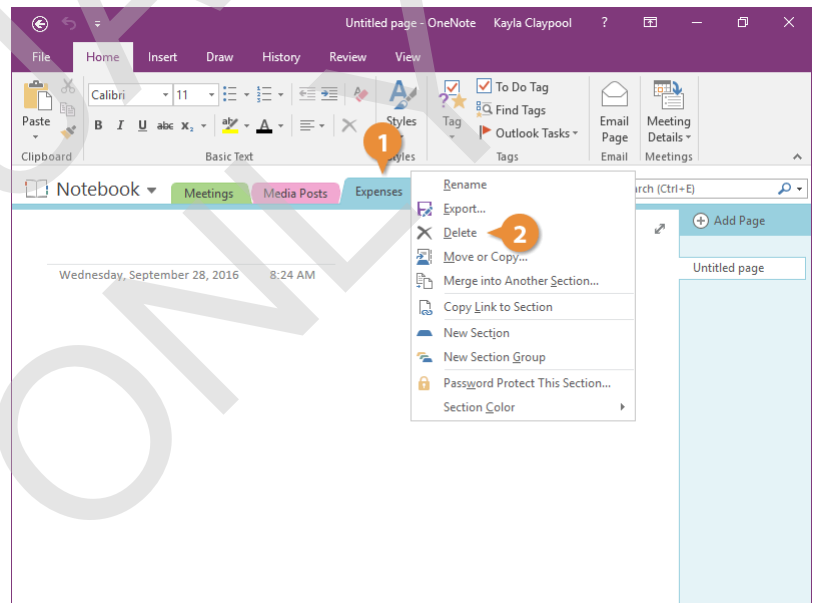
Move a Section

- 1 Click a section tab and drag it to a new location.



Delete a Section

- 1 Right-click a section tab.
- 2 Select **Delete**.

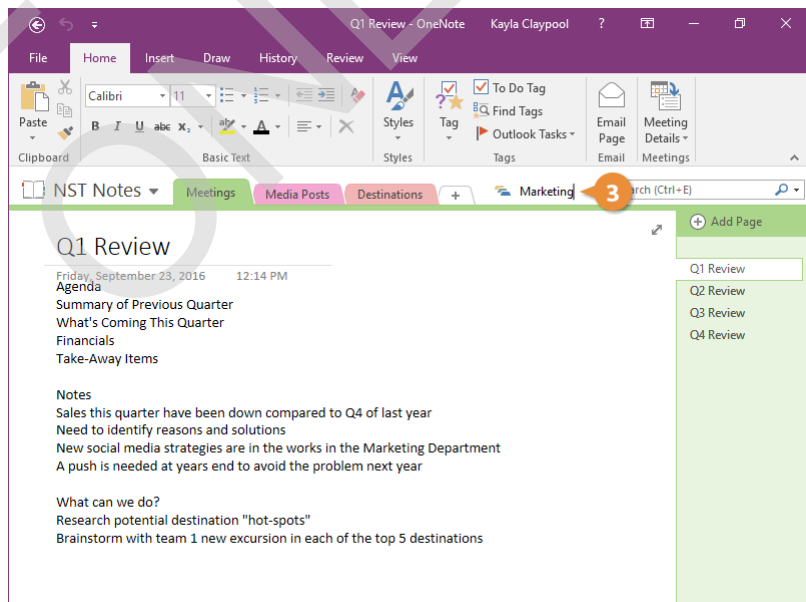
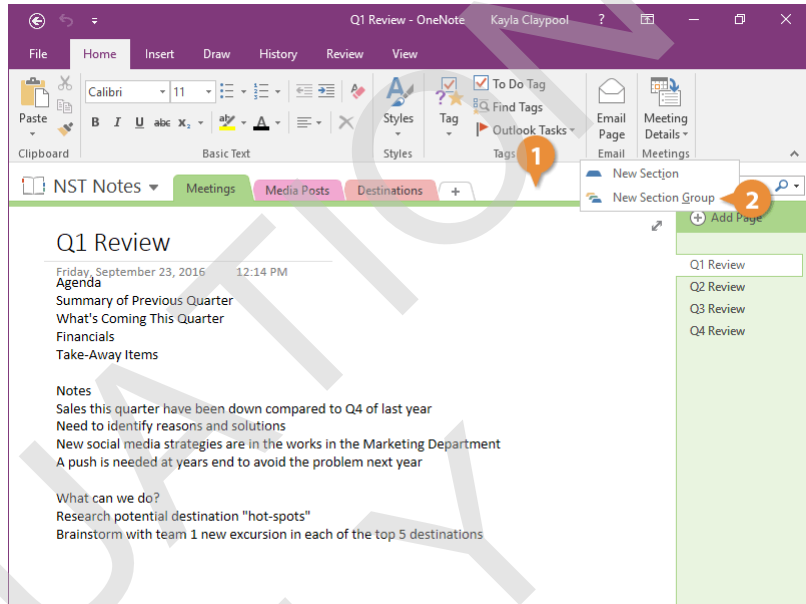


Section Groups

You can use section groups in OneNote to further organize sections. They allow you to group multiple, related sections together.

Add a Section Group

- 1 Right-click in the blank space next to the current sections.
- 2 Select **New Section Group**.
The group appears over on the right and you can just start typing to name it.
- 3 Type a name for the group.

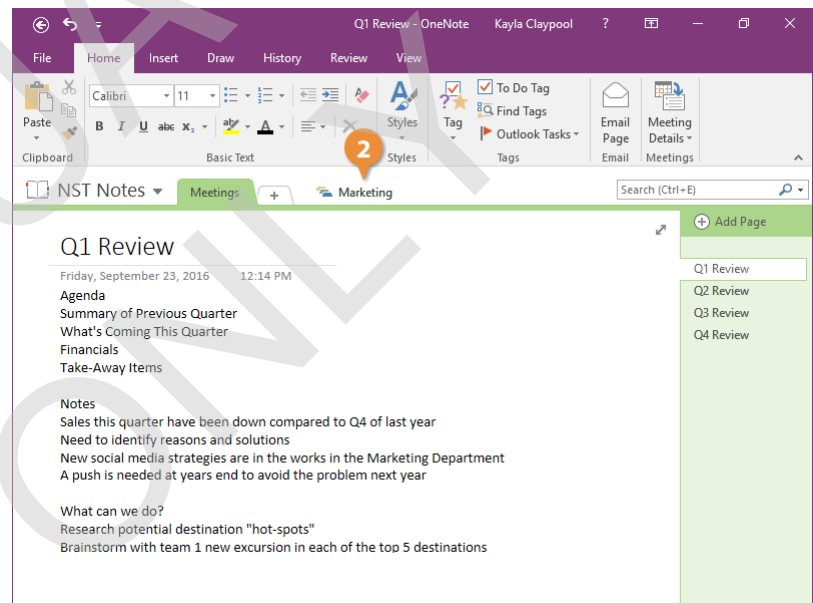
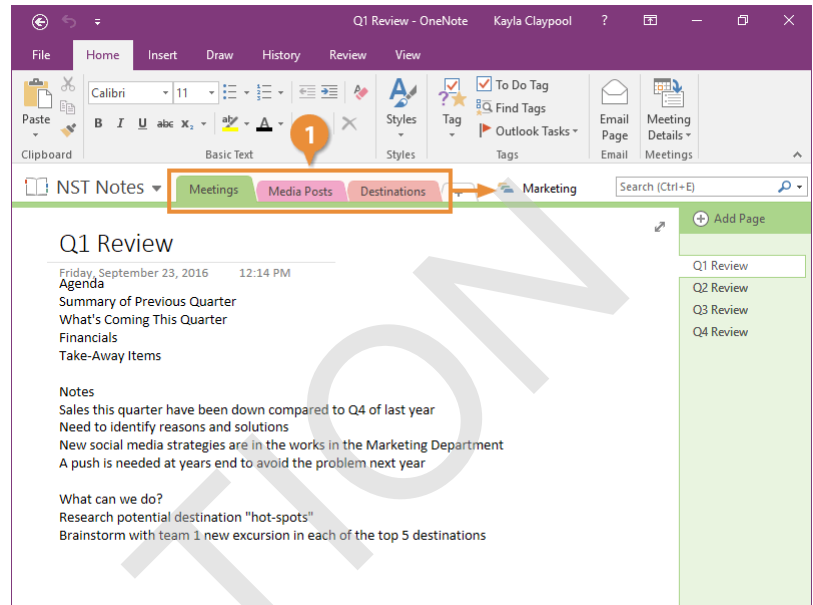


Add Sections to a Section Group

1 Click a section tab and drag it over the section group.

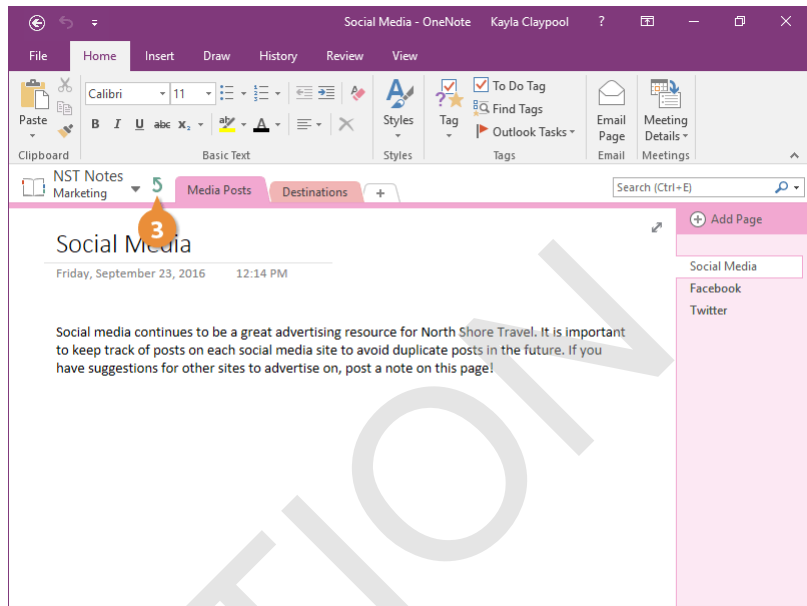
2 Click the section group.

You know you are in a section group because the name appears below the notebook name to the left of the section tabs.



3

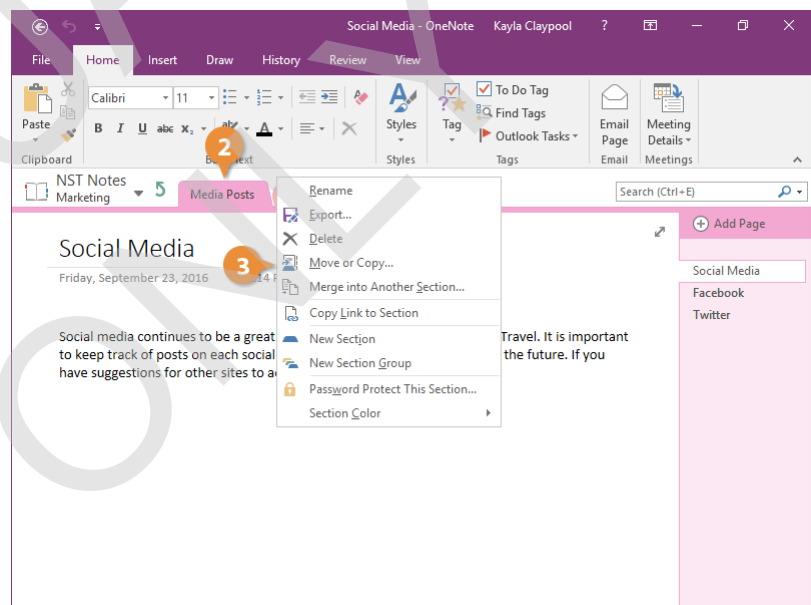
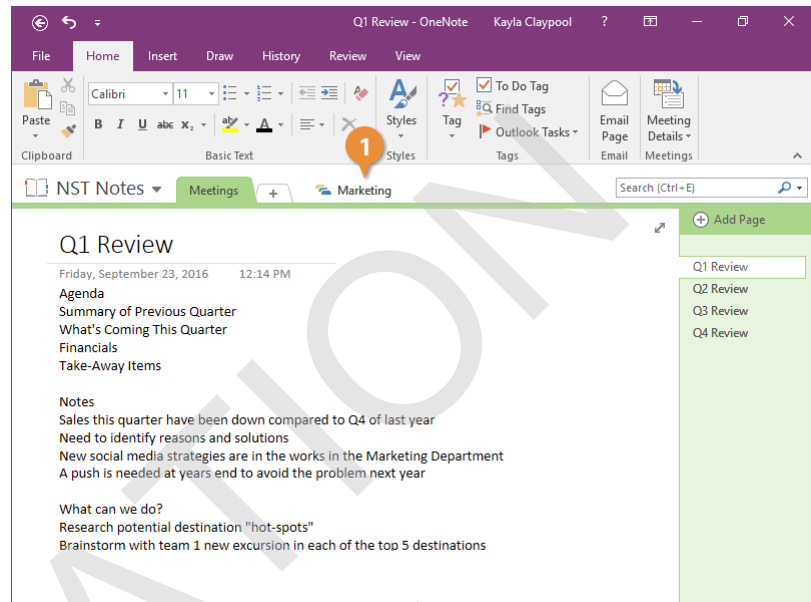
Click the **Navigate to the parent section group** button.



Delete a Section Group

If you decide you no longer need your tabs grouped in a separate section, you can delete the section group.

- 1 Navigate to the section group.
- 2 Right-click any sections you want to keep.
- 3 Select **Move or Copy**.



4 Choose where to move the section.

5 Click **Move** or **Copy**.

Once everything you still need is moved out of the section group, it can be deleted.

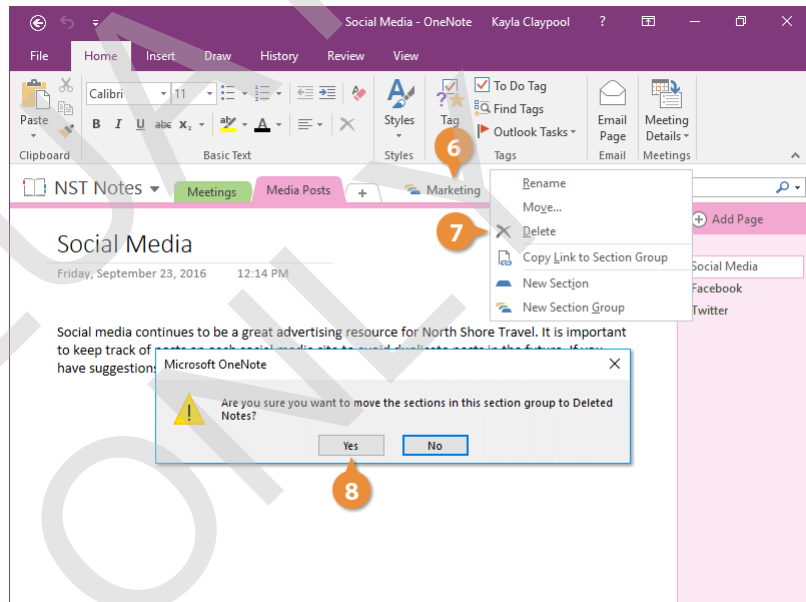
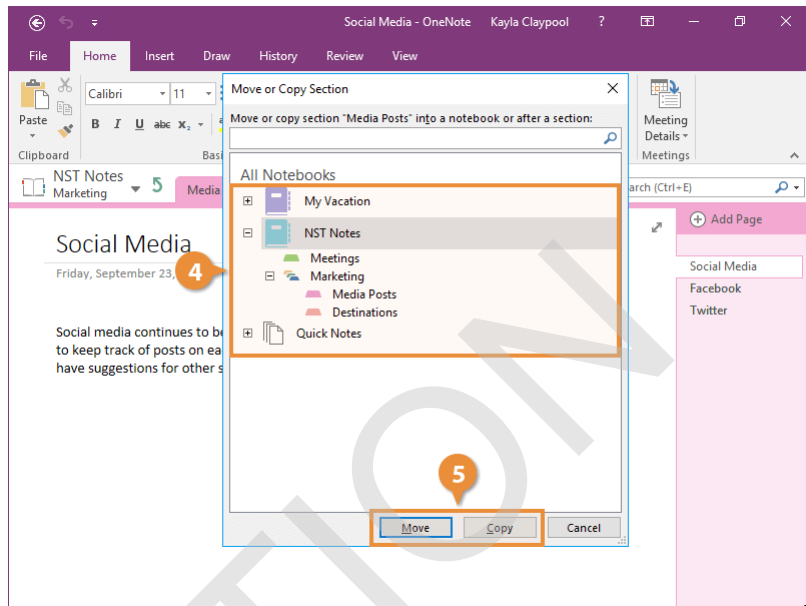
6 Right-click the section group.

7 Select **Delete**.

The dialog box asks if you're sure you want to move all the sections in the group to the recycle bin.

8 Click **Yes**.

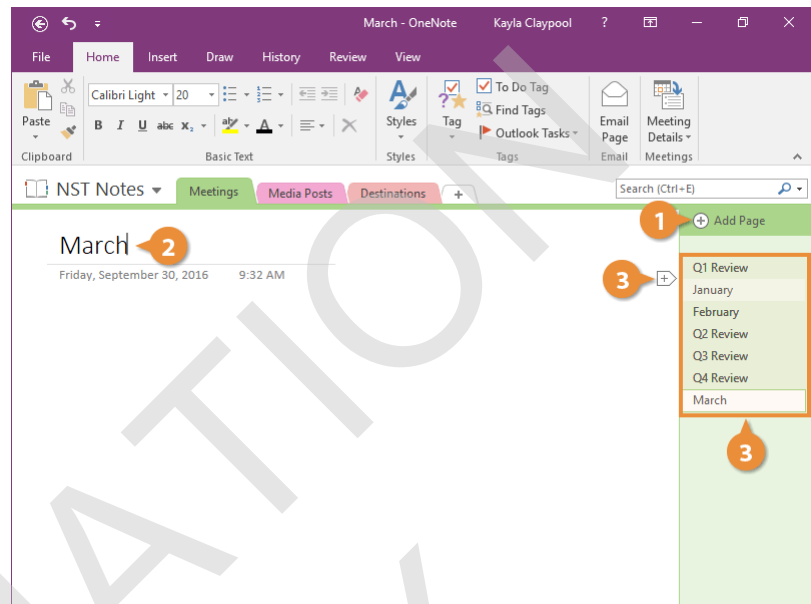
The section group is deleted.



Pages and Subpages

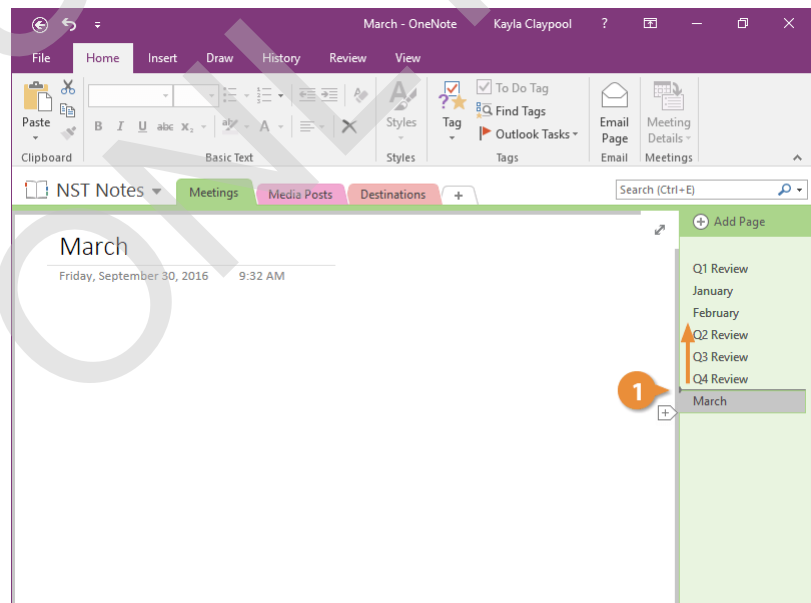
Add a Page

- 1 Click the **Add Page** button.
- 2 Type a page name.
New pages are automatically added at the bottom when you use the Add Page button.
- 3 (Optional) Hover where you want to add a page and click the + button.



Move a Page

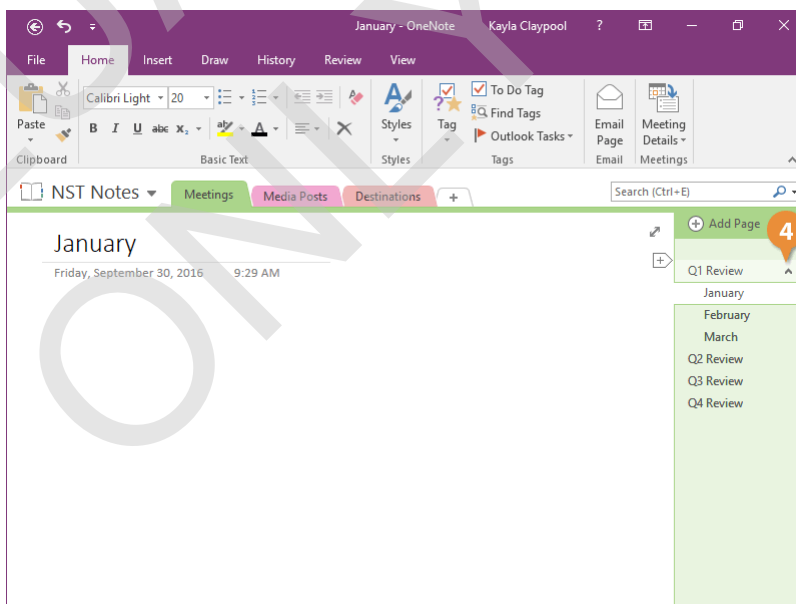
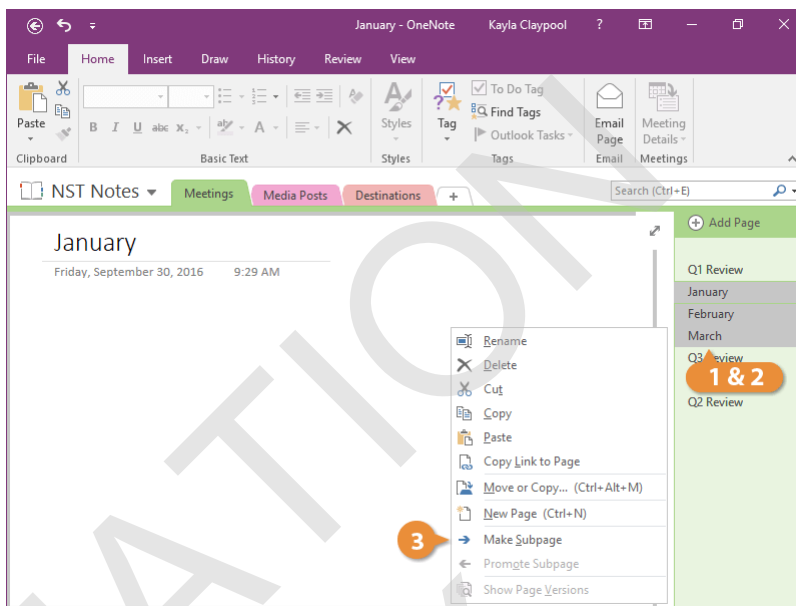
- 1 Click a page tab and drag it to a new location.



Create a Subpage

Once you've added a bunch of pages, it can be hard to keep track of them all. Luckily, subpages help with organization.

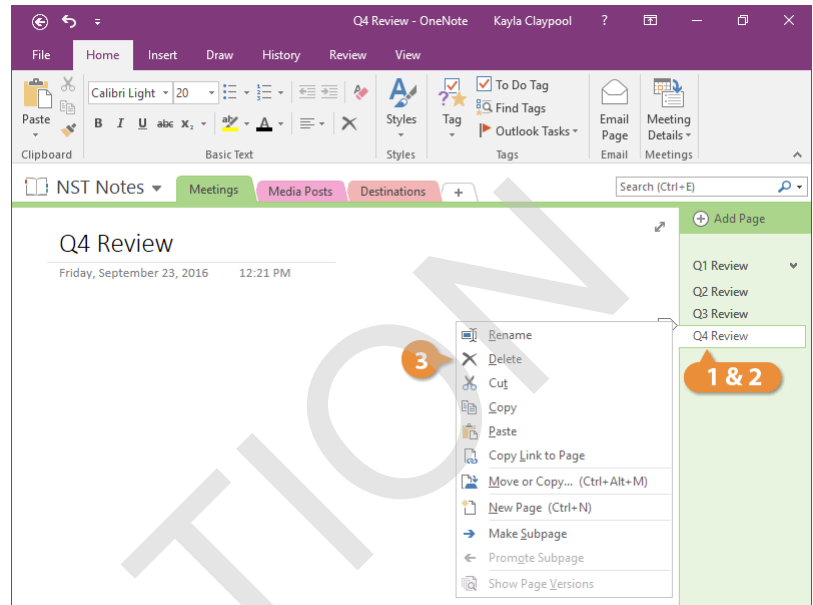
- 1 Select one or more pages.
Tip: You can hold down the Shift key and select multiple pages.
- 2 Right-click a selected page.
- 3 Select **Make Subpage**.
The pages are indented.
- 4 Click the **Collapse** arrow to collapse the subpages.



Delete a Page

- 1 Select a page to delete.
- 2 Right-click the page.
- 3 Select **Delete**.

The page is gone from the section and it's moved to the recycle bin.



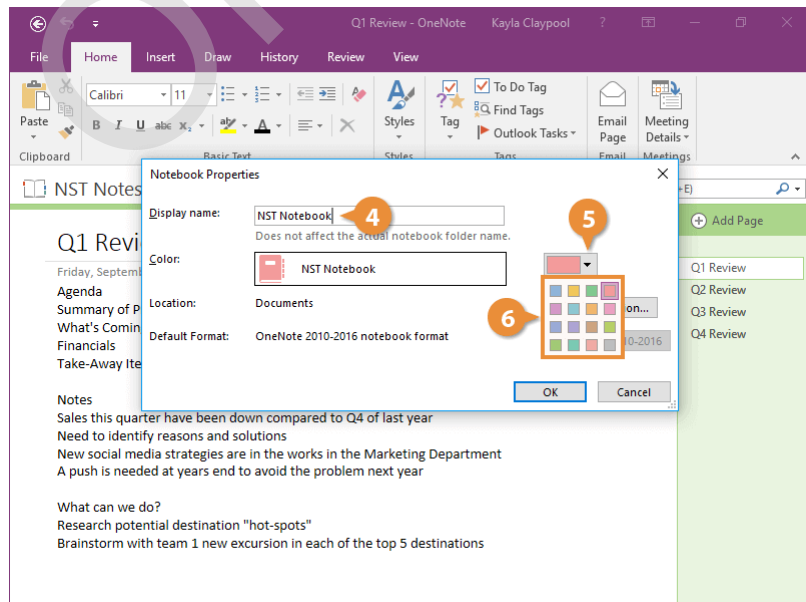
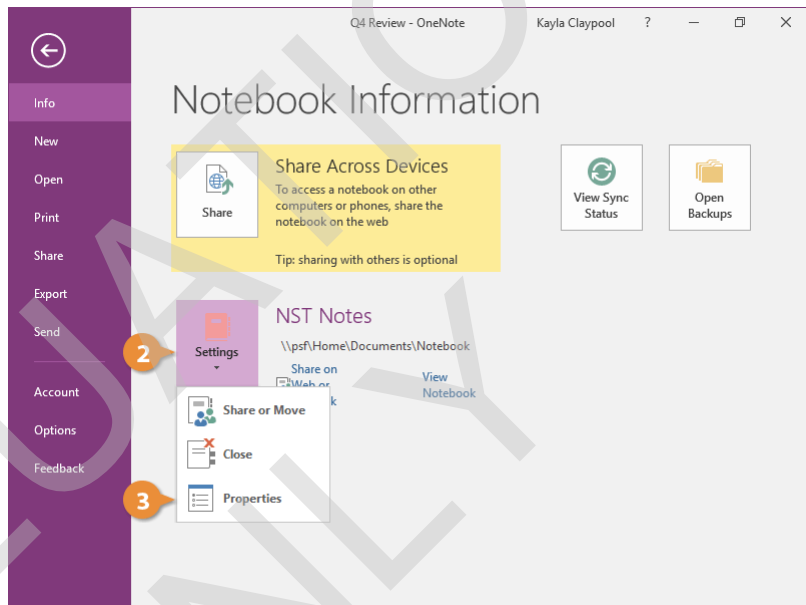
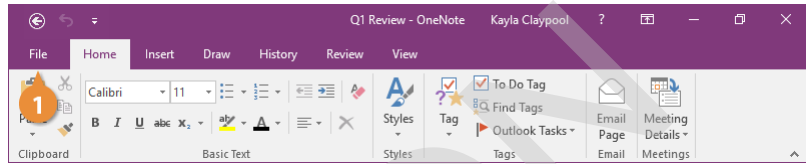
Notebook Properties

Your notebook properties, things like color, save location, and format, can be quickly changed using the Notebook Properties dialog box.

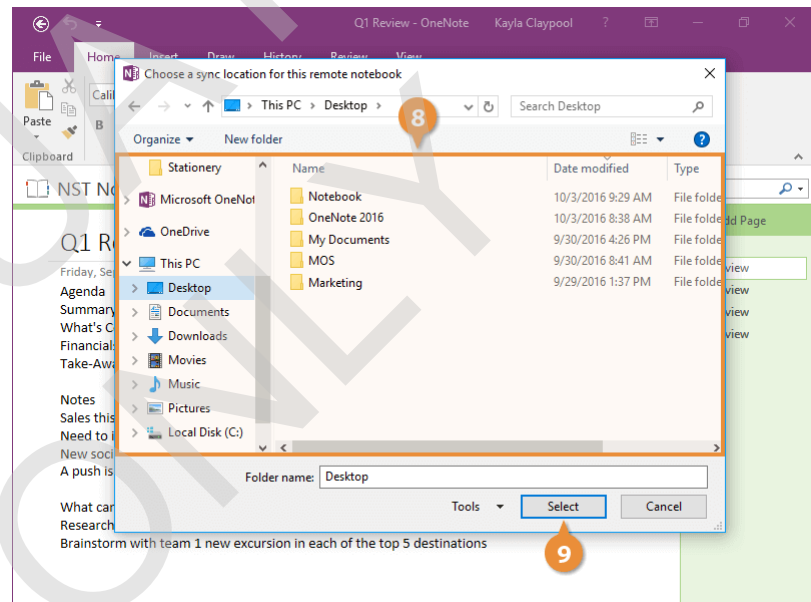
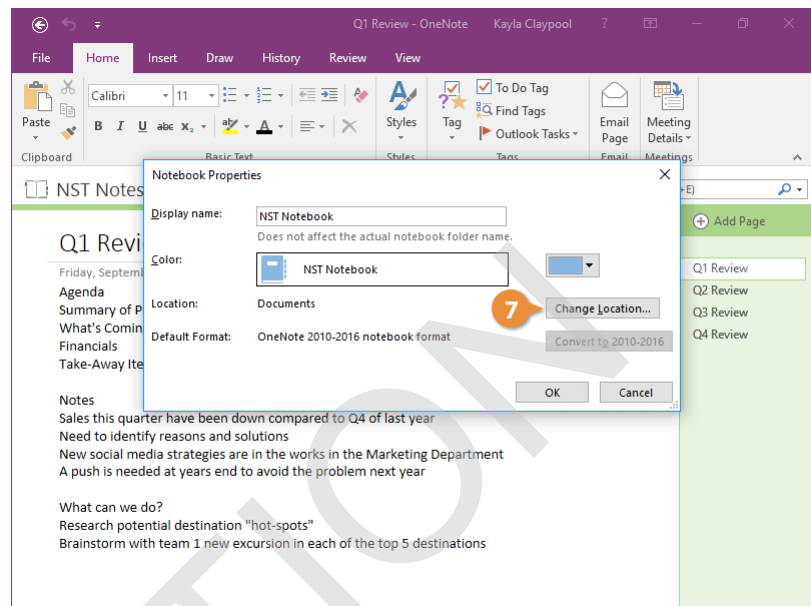
- 1 Click the **File** tab.
- 2 Click the **Settings** button.
- 3 Select **Properties**.

Here is where you can start making changes.

- 4 Type a new notebook name.
Tip: And just know this doesn't actually change the file name.
- 5 Click the **Color** list arrow.
- 6 Select a new color.



- 7 Click **Change Location**.
- 8 Select a save location.
- 9 Click **Select**.

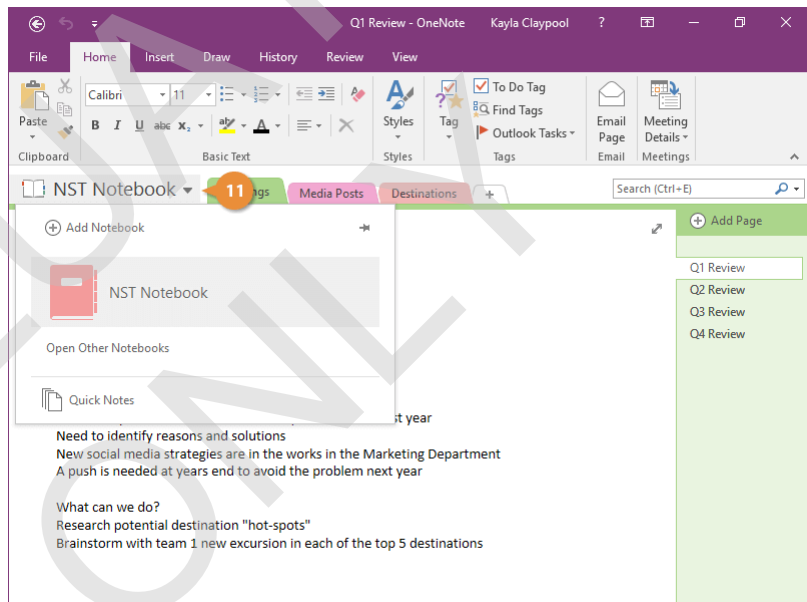
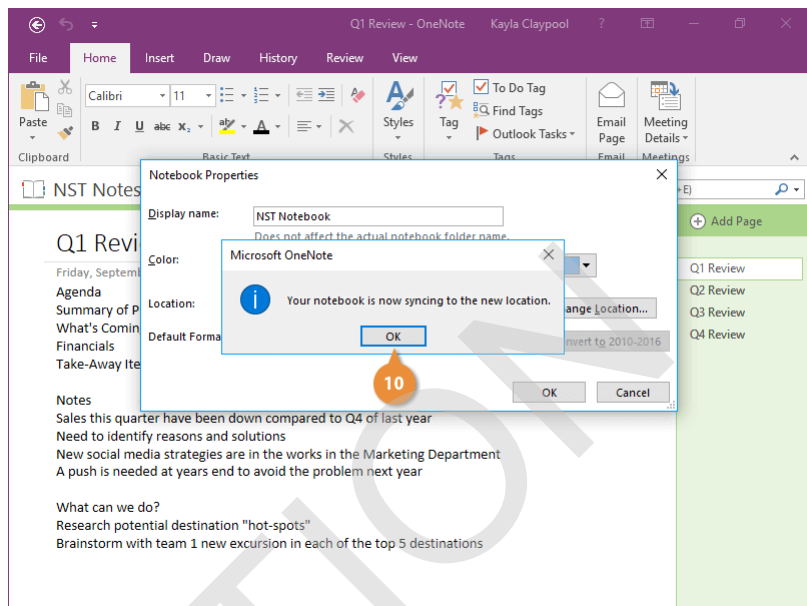


10

Click **OK**.

11

Click the notebook name to see the changes.

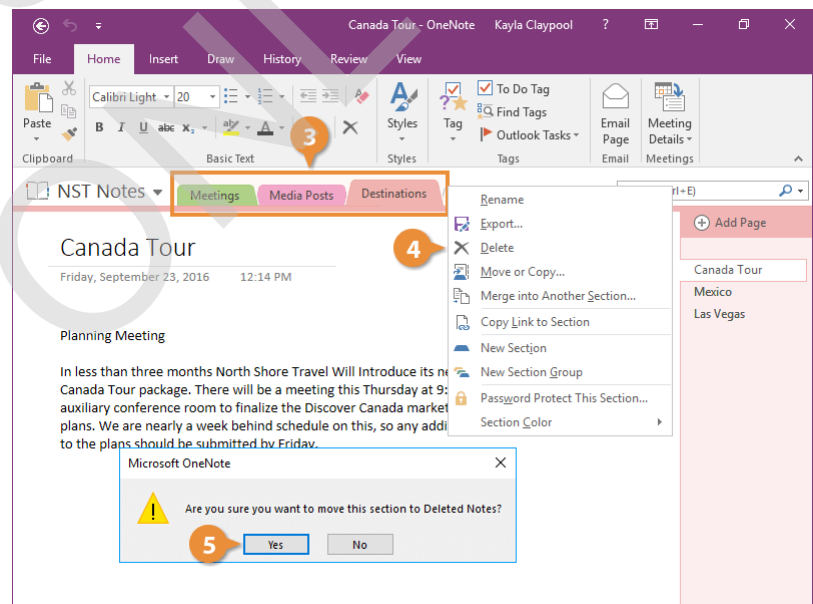
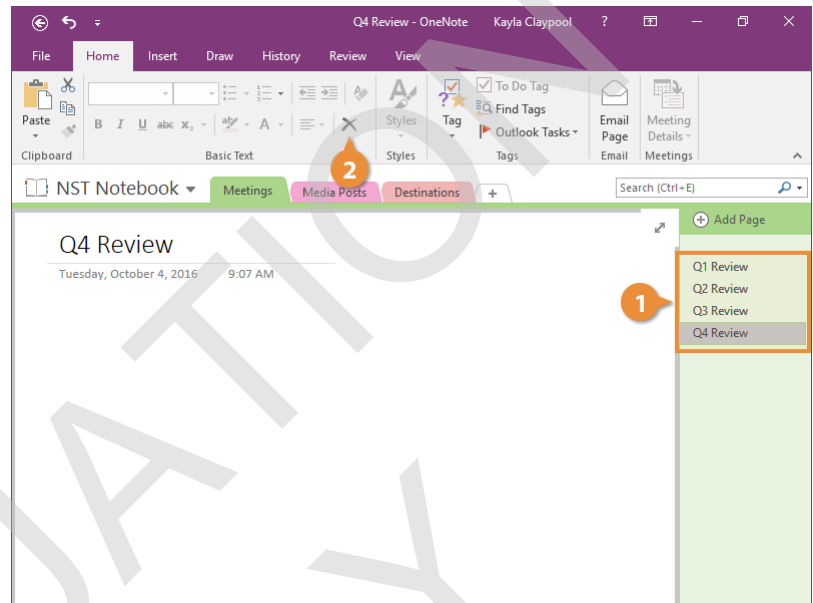


Recycle Bin

When you delete pages or sections from a notebook, they are sent to the recycle bin.

Move Items to the Recycle Bin

- 1 Double-click a page.
- 2 Click **Delete**.
- 3 Right-click a section.
- 4 Select **Delete**.
- 5 Click **Yes**.



Restore an Item

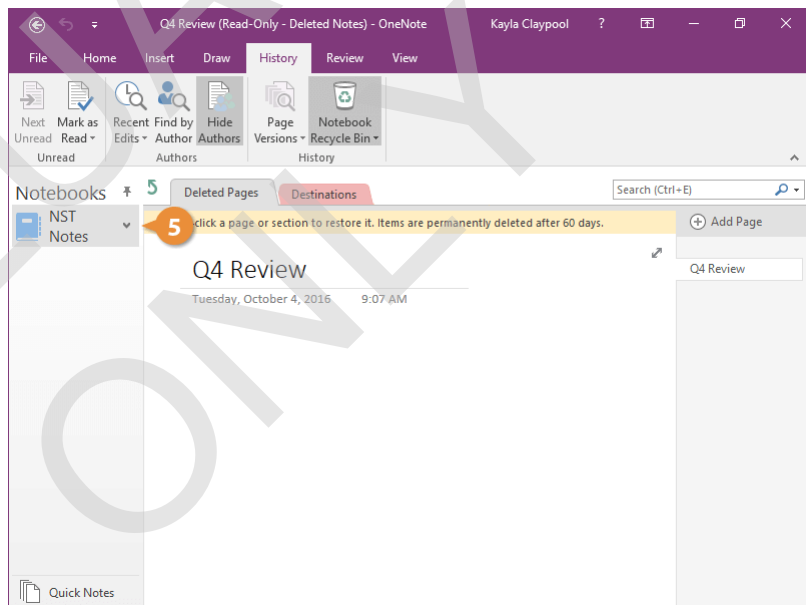
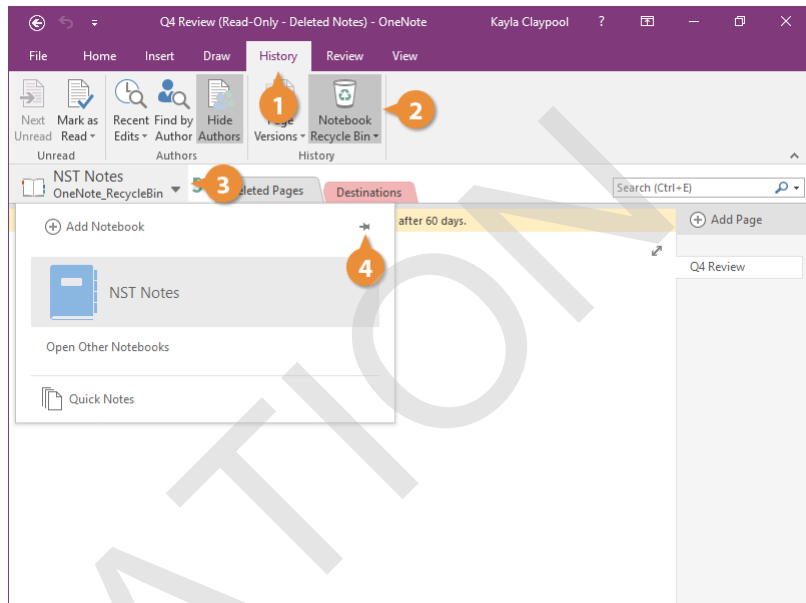
After a few things are deleted, head over to the recycle bin.

- 1 Click the **History** tab.
- 2 Click the **Notebook Recycle Bin** button.

When you're restoring things from the recycle bin, it's easiest to keep the notebook pane open.

- 3 Click the current notebook list arrow.
- 4 Click the **Pin Notebook Pane to Side** button.
- 5 Expand a notebook's sections.

Any pages that have been deleted show up in the Deleted Pages section, no matter which notebook they were deleted from.

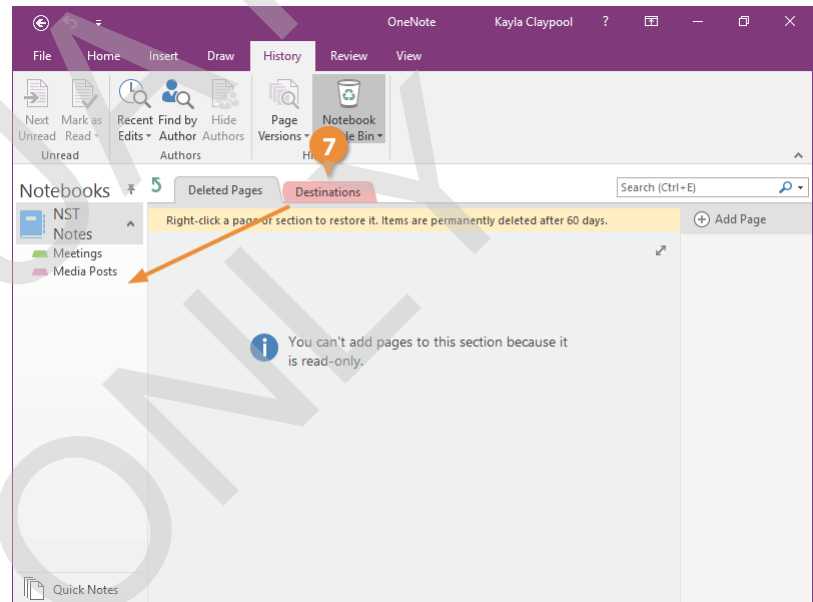
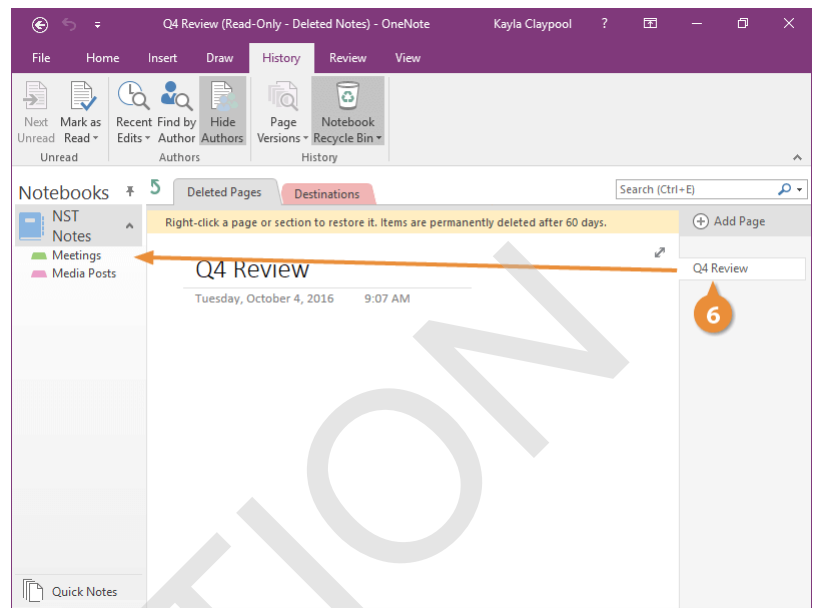


6

Click a page and drag it to an open section.

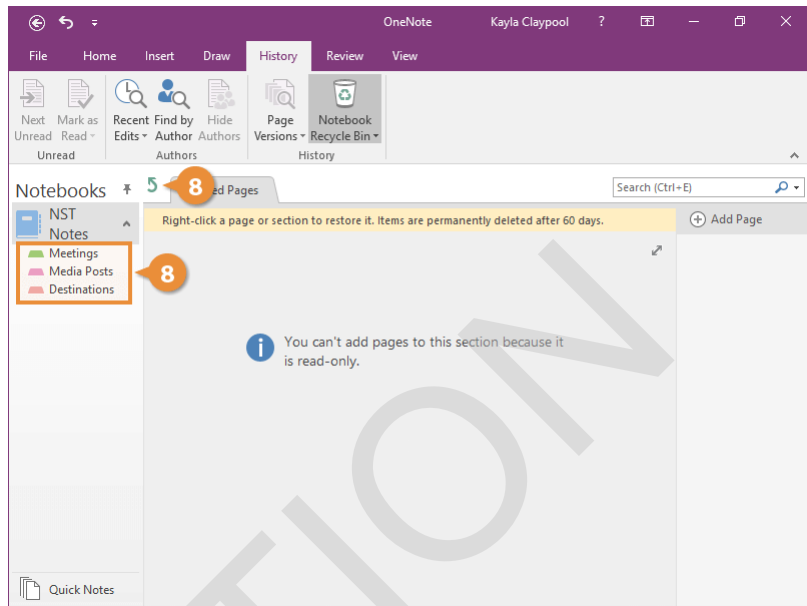
7

Click a section and drag it to an open notebook.



8

Click **Navigate to parent section** or click a section.



Notebook Backup

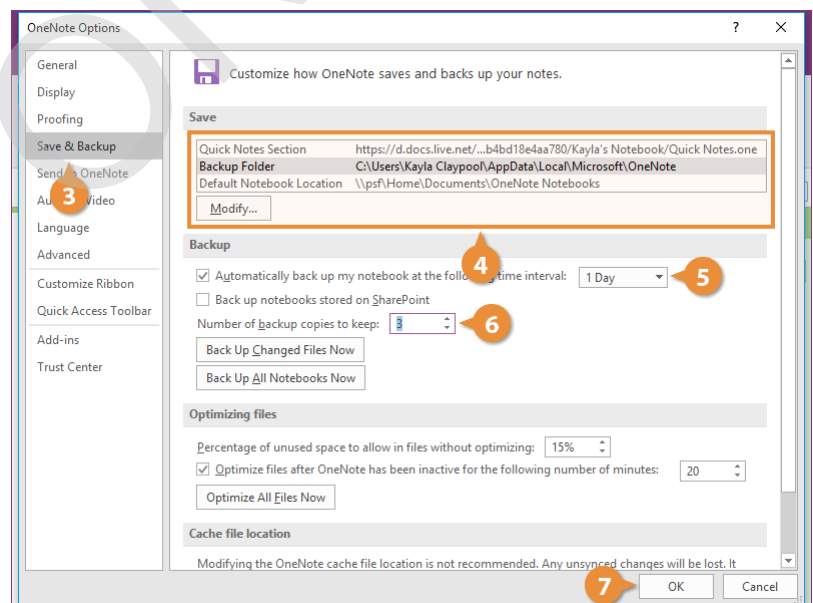
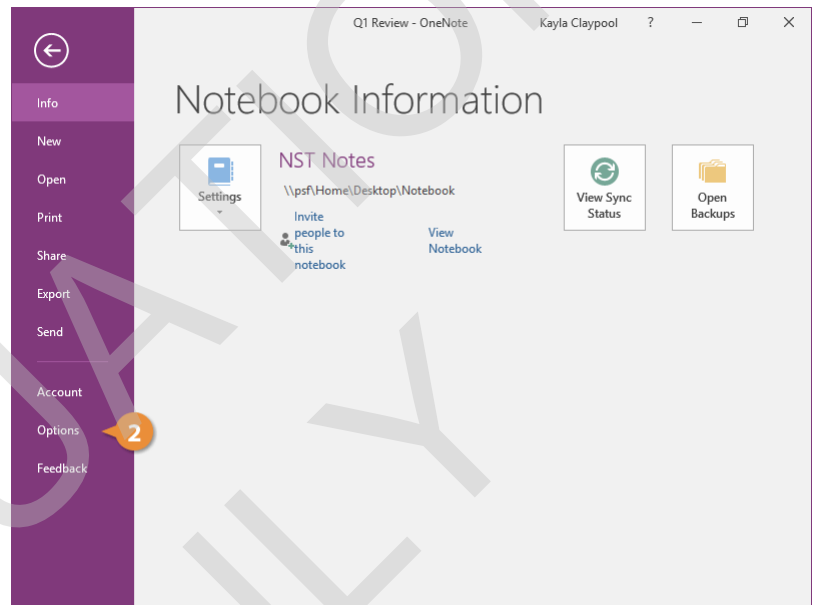
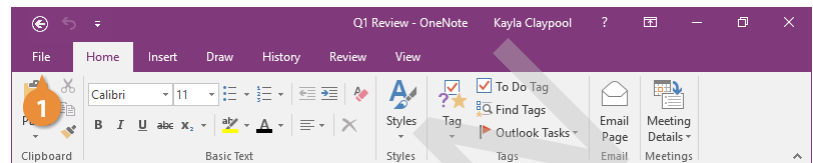
When you're working in OneNote, a backup copy is created every so often in case something tragic happens.

- 1 Click the **File** tab.
- 2 Click **Options**.
- 3 Click **Save & Backup**.

In here, you will see the location on your computer where notebook backups are saved.

- 4 (Optional) Modify the backup location.
- 5 Adjust the save interval.
- 6 Adjust the number of backup copies to keep.
- 7 Click **OK**.

The dialog box lets you know the changes won't take effect until you restart OneNote.



- 8 Click **OK** again.
- 9 Click the **Close** button.
- 10 Restart OneNote.

Now the new backup settings are saved so you don't have to worry about losing your work.

