# ConversationalGeek®

Conversational
OneNote
Essentials

By Heather Severino (Microsoft MVP – Office Apps and Services, Microsoft Certified Trainer)

In this book, you will learn:

- What is OneNote and how it simplifies modern notetaking
- Navigating OneNote and best practices that can significantly improve the creation and sharing of notes

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Microsoft

OneNote
Your digital notebook

Your World, organized

Get organized in notebooks you can divide into sections and pages. With easy navigation and search, you'll always find your notes right where you left them.
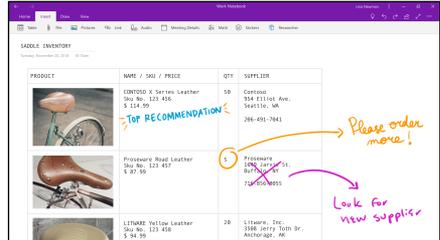
Gather your thoughts…

Quickly capture important information and ideas through images, videos, audio recordings, as well as ink and voice.

…then make them even better

Revise your notes with typed or handwritten text, and highlight and annotate what's important. With OneNote on all your devices, you'll never miss a flash of inspiration.

Share and collaborate

Great minds don't always think alike, but they can share ideas and create together in OneNote.

Microsoft

For more information, visit
www.microsoft.com/onenote

Conversational OneNote Essentials
by Heather Severino
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Publisher Acknowledgments

The "Conversational" Method

We have two objectives when we create a "Conversational" book. First, to make sure it's written in a conversational tone so that it's fun and easy to read. Second, to make sure you, the reader, can immediately take what you read and include it into your own conversations (personal or business-focused) with confidence.

"Geek in the Mirror" Boxes

We infuse humor and insight into our books through both cartoons and light banter from the author. When you see one of these boxes it's the author stepping outside the dialog to speak directly to you. It might be an anecdote; it might be a personal experience.

Within these boxes I can share just about anything on the subject at hand Read 'em!

What is Microsoft OneNote?

"All your notes are in THERE?!?"

You probably take notes every day. These might be handwritten notes with pen and paper listing meeting action items, team brainstorming, class notes, or personal journaling. While this analog way of notetaking works some of the time, what about when you are miles away from your desk and need to access those notes right away?

OneNote is here to help. It provides a digital way for you to capture typed, handwritten, and other types of notes, all neatly organized in notebook sections.

OneNote is available across various desktop, tablet, and mobile platforms.

Let's get you familiar with each of these before we get into the notetaking fundamentals.

OneNote (previously called OneNote 2016)

This application can be downloaded along with the other desktop applications that are part of a Microsoft 365 subscription.

Throughout this book, the content will focus around this version of OneNote unless otherwise noted.
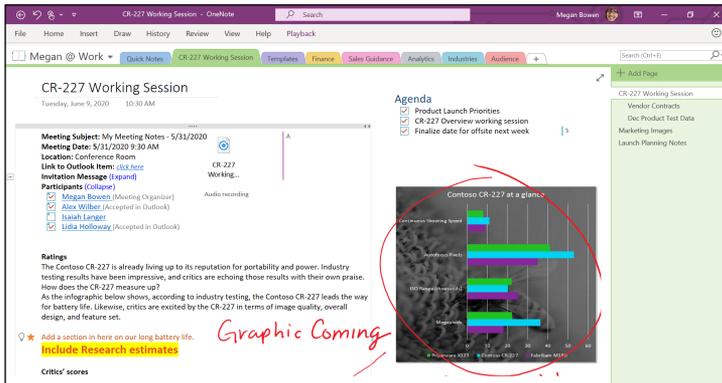
Figure 1: OneNote app interface

OneNote for Mac
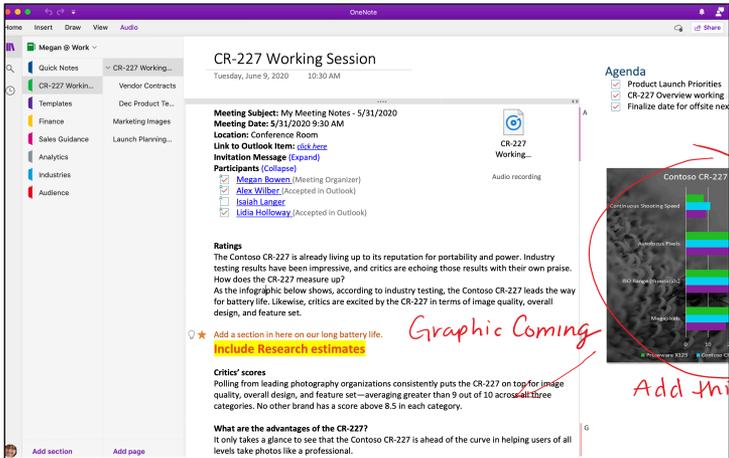
Figure 2: OneNote for Mac app interface

OneNote for Web

This is a free app that can be accessed with a Microsoft account.
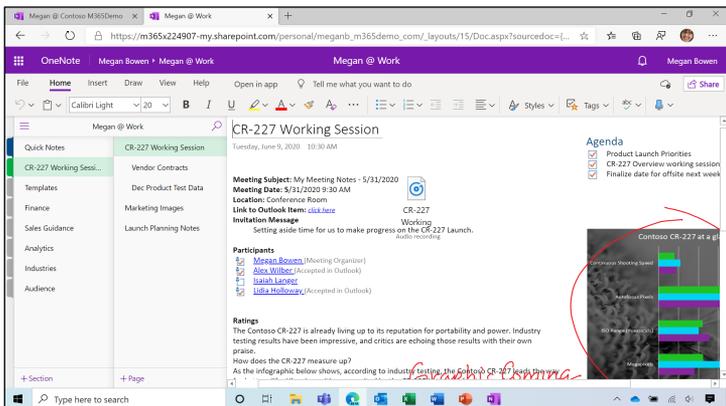
Figure 3: OneNote for Web app interface

OneNote for Windows 10

This application is available for free from the Microsoft Store.
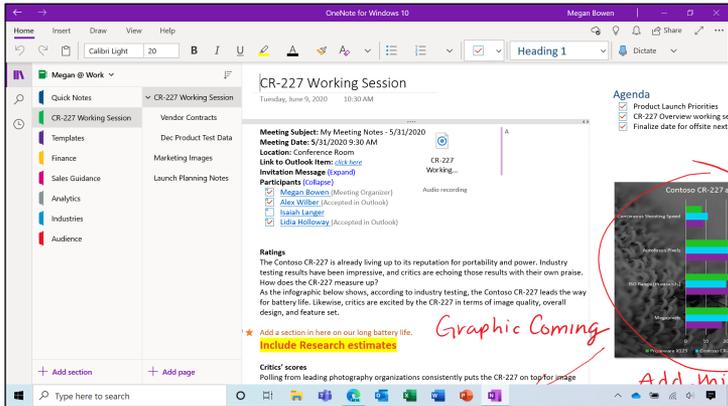
Figure 4: OneNote for Windows 10 app interface

If you have both OneNote (previously called OneNote 2016) and OneNote for Windows 10 installed on your computer, you may be asking which should I use? It's a matter of personal preference. If you prefer feature richness, OneNote is the recommended client on Windows.

OneNote for Android
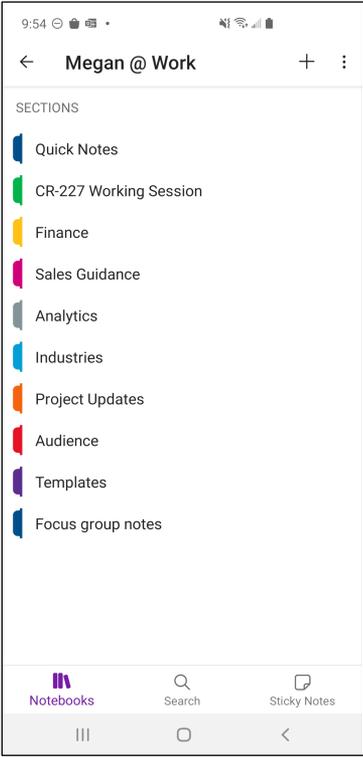
Figure 5: OneNote for Android app interface

OneNote for iOS
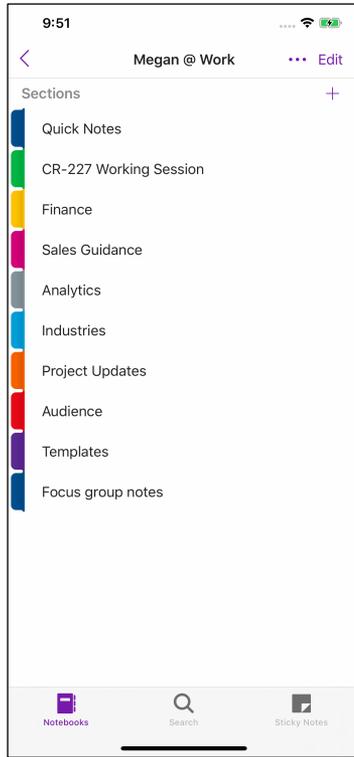
Figure 6: OneNote for iOS app interface

Fun Facts:

While the OneNote app was originally being developed it was codenamed Scribbler.

The first release of this app was announced in the fall of 2002, and shipped with Office 2003.

The Basics

When you launch OneNote for the first time, the app will ensure you have a notebook to work in. If you're signed in with a work or personal account, OneNote will create a cloud-connected notebook. If you don't sign in, OneNote will create a local notebook called "My Notebook".
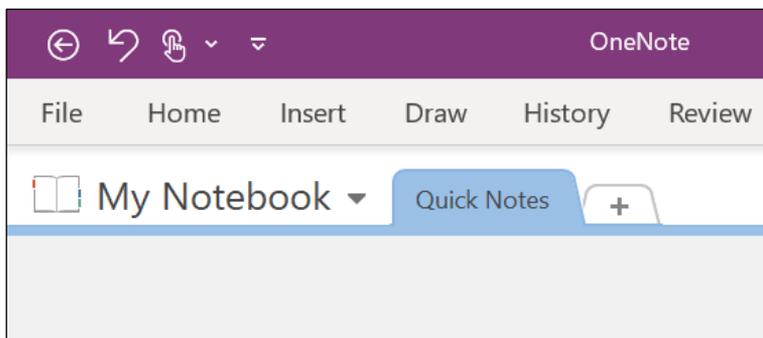
Figure 7: A locally saved notebook called My Notebook

My Notebook is a local notebook saved on your computer's hard drive. This means you can only access it locally from that device. While creating a notebook, you can choose to save it to OneDrive, a cloud document library that is part of your Microsoft 365 subscription.

As the OneNote team likes to say, "a cloud notebook is a happy notebook!"

This is the symbol indicating the Sync status for a cloud notebook in OneNote for the Web and OneNote for Windows 10.

When edits are made to a cloud notebook it syncs this change back to the OneDrive library where it is saved, as well as any other devices you might be accessing this notebook from, such as a computer, tablet, or mobile device.

Watch this video to learn how to sync to the cloud.

https://aka.ms/SyncScreens

On a side note, if you open OneNote for Windows 10 or OneNote for Web and the open notebook has your name and organization name (i.e. Heather @ Conversational Geek), this is the default notebook that resides in your OneDrive for Business document library.

Customize the OneNote Interface

Before you start getting your notebook organized for notetaking, you may want to customize the interface.

If more notetaking space is needed, the ribbon can be collapsed by double-clicking the ribbon tab or with the keyboard shortcut, Ctrl+F1. When you need to access ribbon commands, follow the same process to display it again.

If you plan to switch between many notebooks, the notebook pane can be pinned to the side of the app. Select the arrow next to the current notebook name to display the notebook panel, then select the Push Pin to pin the panel to the side of the app, making it always viewable.

The default setting for the Pages panel is to the right of the current Section page in view. You can change this to display on the left, next to the Notebook panel. Head on over to the File

tab, then select Options, next select Display, and check the box labeled Navigation bar that appears on the left. Select OK.
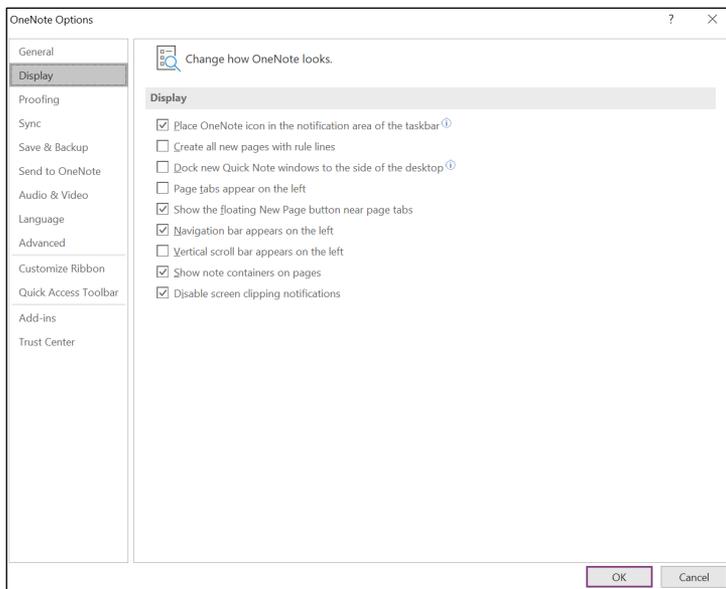
Figure 8: OneNote Options Display menu

Making this setting change more closely mimics the navigation layout of the OneNote for Web and the OneNote Mobile apps.

If you're a fan of shortcuts, you will likely also be a fan of the Quick Access Toolbar (QAT). Out of the box it includes shortcuts to commands such as Back and Undo. As you discover a command in the ribbon that you use frequently (or maybe not enough to remember where it's located), right-click the command, then from the context menu select Add to Quick Access Toolbar. Now it's listed on the QAT for quick access, no matter what ribbon is in view.

The Quick Access Toolbar can be moved below the ribbon area. This is my personal preference as it brings the commands closer to where I am taking notes. It also gives you more room to add lots of command shortcuts!

If you work in a low light area of your office or home, you can improve the readability of the app interface and your notes by switching to Dark Mode. Making this change switches the interface elements from light to dark colors without losing fidelity. To enable this setting, head on over to the File tab, select Options, select General, and then from the Office Themes context menu select Black.

Give Notes Structure

The most common question I get from OneNote fans is "What's the best way to organize a notebook?" Are you ready for the answer? Drum roll, please… You get to decide. Your notebook is flexible, so you can organize it how you want!

My advice is to consider how you organize paper notes and documents as well as digital documents in folders and subfolders. Does the system work? If not, what might you change? Take these considerations and turn them into a notebook productivity system (structure) that works best for your workflow.

My favorite conference to attend each year is Microsoft Ignite. At the 2019 Microsoft Ignite conference, Ben Hodes made a huge OneNote announcement to a packed room of more than 1,000 attendees (so packed I was sitting on floor in the corner taking notes with my iPad).

When he announced that OneNote 2016 was coming back the crowd roared with excitement! OneNote 2016 was slated to go away and be replaced by OneNote for Windows 10. I can't help but think this change happened because OneNote 2016 was loved by so many. After all it's "Your OneNote for taking notes, your way."

You can read more about that big announcement at: https://techcommunity.microsoft.com/t5/office-365-blog/your-onenote/ba-p/954922

Give your notebook structure by creating tabbed sections for project names or specific topics. Think of these sections as the digital equivalent of a three-ring binder with color section tabs that's likely sitting in your office right now, or, that Mead ® Trapper Keeper ® that you may possibly have had back in school to organize (trap) your homework, class notes, and field trip permission slips.

If you have many sections in a notebook, consider setting up section groups. Once you create a named section group you can drag and drop existing sections into it. When writing courses, I like to create section groups by year: 2020, 2021, 2022, etc. Then I create sections within a group by course name: OneNote 101, OneNote Collaboration, etc. This way, while working in 2020 I only see the section titles for that year. It's a simplified organization method that keeps me productive.

Next, create pages within a section in preparation for capturing notes. Pages are an empty canvas for note containers to be placed anywhere you like. They give you more flexibility than the left-to-right margin paragraph format of a Word document.

You can use the keyboard shortcut Ctrl+N, or Command+N, to create a new page in a notebook.

The same keyboard shortcut also works in other Microsoft 365 apps to create a new document in Word, a new workbook in Excel, a new email in Outlook, etc.

If you're not sure where to begin with organizing many notes on a page, check out the pre-built page templates that come with OneNote. Several categories offer project, meeting, task, schoolwork, and personal templates. These can even be customized with branded colors, images, and text, and then saved as a personal template that you can use in the future.

Figure 9: Lecture Notes and Study Questions page template

I setup customized templates for specific projects, meetings, and idea notetaking. Since each section is dedicated to one type of notes, I like to reuse a template when I need to create a new page of notes. Instead of going through the manual process of creating a new template page, I set the template as the default for any new page added to that section.

Take Notes

Okay, now you're ready to capture important information and ideas on pages.

Anywhere you place the cursor on a page and start typing, your thoughts are being captured in note containers. This is great for brainstorming and design thinking. If you want your notes to be more organized in a tabular format, insert a table (this is a similar process to creating a table in a Word document or a PowerPoint presentation).

One of my favorite keyboard shortcuts is to insert a table with the Tab key. Type in the first word you want to be placed in the first cell, then press the Tab key and the next cell in the same row is created. Repeat this process until you are ready to move to the next row and press the Enter or Return key. Voila! You have instantly built a table without leaving the note container area.

If you manage projects or programs, you likely have many notes, some of which might include ink, images, and more. These notes will need to be grouped together, so you can understand the big picture.

Say you're working on a restaurant remodel and need to take meeting notes, view the budget workbook, and record a site visit. All of these can be added to a page.

Figure 10: Notebook page with meeting notes, Action items list, and a line chart

Watch this video to learn how to use digital ink to revise existing documents.

https://aka.ms/InsertPrintout

You may have heard about scientific research into how writing by hand helps your ability to remember things. If you like the sound of this theory, you're in luck! Handwritten notes can be jotted down with digital ink on digital paper. An entire ribbon called Draw provides different colored pens and highlighters you can select from. Before you start writing, you may want to add ruled or grid lines to the page, this way your handwriting stays horizontally aligned and evenly spaced.

Digital ink is also great for revising other types of notes, such as annotating a typed note, highlighting changes needed for an inserted PowerPoint presentation, or marking up amendments for a new company branded logo.

Did you know that the ink effect known as Galaxy Ink in OneNote for Web was built with samples of Hubble Space Telescope imagery?

Handwriting notes in OneNote works best with a touch-enabled device and a stylus.

Here are a couple workflows that may work for you:

- From your home office, take handwritten notes on a tablet with a stylus, while attending a Teams online meeting from your computer.

- While at a lunch meeting with a client, take handwritten notes on your mobile phone with a stylus.

Watch this video to learn how to convert your digital ink text to typed text.

https://aka.ms/InkToText

If you can talk faster than you type (like me), or you are just tired of typing, then check out the Dictate feature in OneNote for Web. Select your spoken language, speak into the mic and watch as it types the notes on the page. It even understands spoken punctuation such as a period, exclamation point, or question mark.

Tag and Search for Notes

Think about how many notes you take over the course of a year – probably quite a lot. How do you quickly find all notes related to a specific project, say that restaurant remodel mentioned earlier? There may be notes about meetings with the contractor in the Meetings section, interior design photos in Design section, and permits somewhere else.

OneNote has two features that can help, Search and Tags.

Just as you can in other Microsoft 365 apps, you can search for keywords or phrases in OneNote. The default setting is to search all open notebooks. You can easily change the scope to the current notebook, a section group, or a section. Searching for the keyword "design" will display a list of linked matches, including typed notes, handwritten notes, inserted documents, images, and more.

There are two hidden gems when it comes to searching for notes:

1. You can search for spoken words in audio and video recordings.

2. You can search for text in logo graphics, photos, and PDFs with OCR (Optical Character Recognition).

Note that both these features are enabled by default in the OneNote app.

What a game changer! With this, in addition to the typed, handwritten, and document notes related to design, you can also search the video walkthrough of the restaurant remodel for where the spoken word "design" was mentioned in your audio narration.

But what if you have notes that relate to Design but do not mention the word design?

Have no fear, tags are here! The pre-built tags that OneNote comes with give you the capability to categorize or prioritize specific notes.
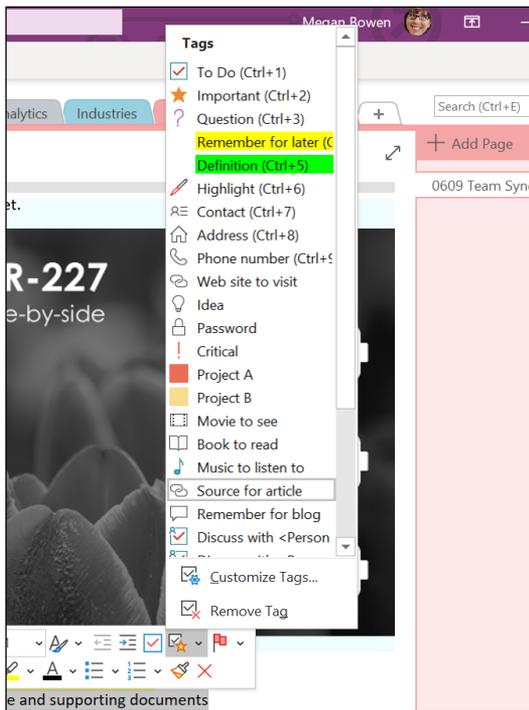

Figure 11: Mini toolbar Tags list

Multiple tags can be assigned per note container and then later you can find all the content that matches specific tags. While the pre-built tags are great to get you started, you will likely need tags that are more specific to a topic or a project.

While creating a custom tag:

- Assign the display name

- Pick the symbol

- Select the font and highlight colors

- Assign a keyboard shortcut (up to nine tags can have assigned keyboard shortcuts)

Say that restaurant remodel project mentioned previously has the code name, Project Falcon. A custom tag named Project Falcon can be created with a Lightning Bolt symbol and the assigned keyboard shortcut Ctrl+1.
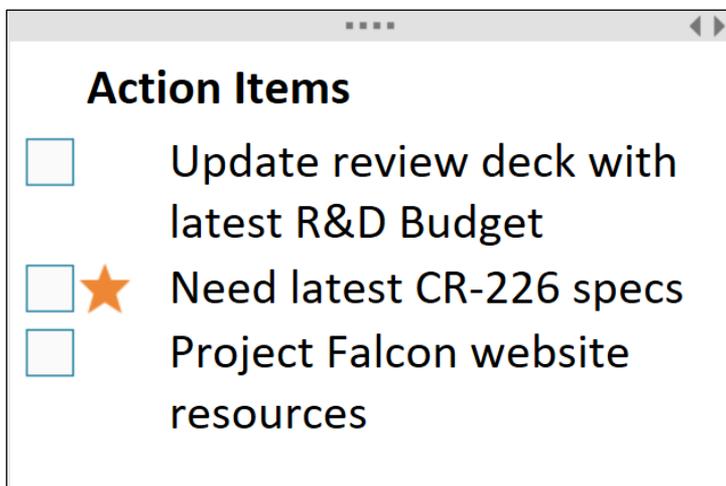

Figure 12: Actions Items list with tagged To Do items

Now all note containers can be tagged and quickly retrieved in the future.

When I have ideas for a LinkedIn Learning video course or updates to an existing course, I have a custom tag system I like to use to label these. For new content notes, I use a Content Manager custom tag. For in-production questions/feedback request notes I use a Producer tag. Then when I am getting ready to send an email or meet the Content Manager or Producer, I can find everything I need to discuss with them.

Export and Send Notes

At the beginning of this book, I mentioned that a cloud-stored notebook can be made a shared notebook by inviting others to view and edit. Just remember that any link to a notebook provides access to the entire notebook, even if you are only sending a link to a specific section.

But what if you don't want to share your entire notebook with others and instead just want to send a single page or section of your notes?

You can quickly send the current page in view by email using the Email Page command from the Home ribbon, or by using the keyboard shortcut Ctrl+Shift+E. This opens a new email with the page name in the Subject field, and the notebook page contents in the message body area.

If you think you will use the Email Page command frequently, you may want to consider adding it to the Quick Access Toolbar, as we discussed in the "Customize the OneNote Interface" section earlier in this book.

If you need more choices for exporting notes, go to the File tab, and select the Export menu. From here you can choose to export a page or section in many different formats such as the OneNote format, a Word document, or a PDF.
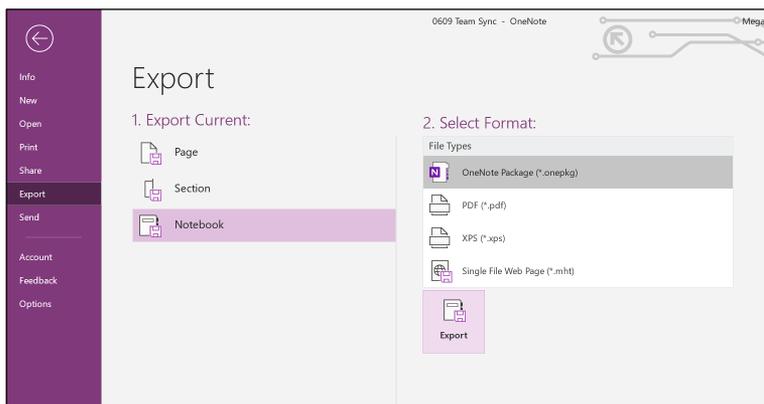
Figure 13: Export menu in the backstage area of the File tab

If your notebook is saved in a cloud library, such as OneDrive, you can password protect all sections but the one you want to share. This way, you can invite others to view or edit that section while not giving them access to sensitive or confidential information in other sections. And as a bonus, you know they are always viewing the latest, most up-to-date notes.

The Big Takeaways

In a world where people can (and do) work from anywhere, Microsoft OneNote is a feature-rich notetaking solution that helps you capture, organize, and access notes from anywhere. Through a variety of different apps (desktop, online, or mobile) you can jot down notes, share ideas, capture meeting action items, and access notes more effectively.

We know that Microsoft will continue to build more connective tissue between all the services in OneNote and other connected Microsoft 365 apps and services. We're excited to see what comes next.

To download the OneNote application, visit:

https://www.onenote.com/download

We want to hear about your notetaking in OneNote. Tell us about your experience online or get your questions answered in the Microsoft Tech Community at:

https://aka.ms/ONTechCommunity

You can also use these Microsoft resources to start or enhance your notetaking journey with OneNote:

Get started with OneNote help & learning:

https://aka.ms/MicrosoftOneNote

To learn more about capturing and organizing ideas with Microsoft OneNote, follow @msonenote on Twitter.

Submit, upvote and track progress for OneNote feature suggestions on the OneNote UserVoice page:

https://onenote.uservoice.com

Want to find out more about how OneNote can help you in different settings? Check out the other ebooks in this series:

Conversational OneNote for Meeting Notes
https://aka.ms/ONMeetingNotes
Conversational OneNote for Collaboration
https://aka.ms/ONCollaboration
Conversational OneNote for Life Moments
https://aka.ms/ONLifeMoments

Quickly become conversational about using Microsoft OneNote.

The art of note taking has evolved. Today's meetings, journals, and brainstorming sessions require an ability to easily create, categorize, store, retrieve, and share notes. In this ebook, you'll learn about OneNote and how it can be used to completely transform your note taking.

About Heather Severino

Heather Severino is a Microsoft MVP, Microsoft Certified Trainer (MCT), and owner of TeachUTech, specializing in Microsoft Office, presentation and instructional skills training, instructional design, and authored training videos.

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