Using OneNote and Office Live

By

Robert Crane

Computer Information Agency

http://www.ciaops.com

Index

Introduction

Copyright and Usage

This document has been created by the Computer Information Agency (www.ciaops.com) and is copyright. You are however free to distribute this document to third parties only in its entirety and without modification. For information about using all or part of this document aside from this please contact director@ciaops.com.

Donation

This document is provided free of charge however significant time and effort is involved in making it available. If you have found the information contained within useful you are asked to make a donation via http://donation.ciaops.com. Any contribution, no matter what size, is used to help us improve the quality and quantity of our offerings.

Format

Words that are displayed with an underline can be found at the glossary at the end of the document.

Terms

This document from the Computer Information Agency is provided as is. Every effort has been made by the author to ensure that information provided is correct however this cannot be guaranteed.

By using this document you hereby assume full responsibility for any risk to computer systems, now and forever arising out of, or related to the use of this document on any computer system.

Feedback

Any feedback, corrections or suggestions concerning this document can be addressed to director@ciaops.com. For further information about the creator of this document please see the *About* section at the end.

What is OneNote?

OneNote is an electronic version of a paper notebook where you can record all sorts of information that you probably now typically keep on paper. You enter the information into OneNote in a variety of ways including typing, copying and pasting as well as using a stylus if available. You can also easily draw diagrams and include other graphics to enhance the information that you save.

OneNote allows you to easily edit and relocate your information. You can quickly and easily create more space at the bottom of a page, move a section to another location or create new pages and sections quickly and easily. You can even have multiple notebooks for each different type of information.

When OneNote is installed it also installs a number of 'clipping' buttons to other applications like Outlook and Internet Explorer. This allows you to easily send information like emails or web pages directly to OneNote for later reference. As part of this clipping service, OneNote will tag your information so you know exactly where it came from for later reference if required.

By default, OneNote creates notebooks on your local computer. It is however also possible to save these notebooks in a shared location on a File or SharePoint server. Once the notebooks are saved in a shared location they can be accessed by multiple people. This allows your team to easily collaborate and share information such as emails and projects. When changes are made they are immediately updated so that they are available to all users of the notebook.

If the notebooks are saved in a shared location it is possible to work with them offline and update the shared copy when back online. Using this feature it is possible to locate OneNote notebooks on shared locations on the Internet and have them available to users connected to the Internet. When these users are not connected to the Internet they can still work on their local copy of the notebook and update the shared copy when they return to being online.

This document will demonstrate how that ability can be configured using a freely available shared space from Microsoft called Office Live Small Business.
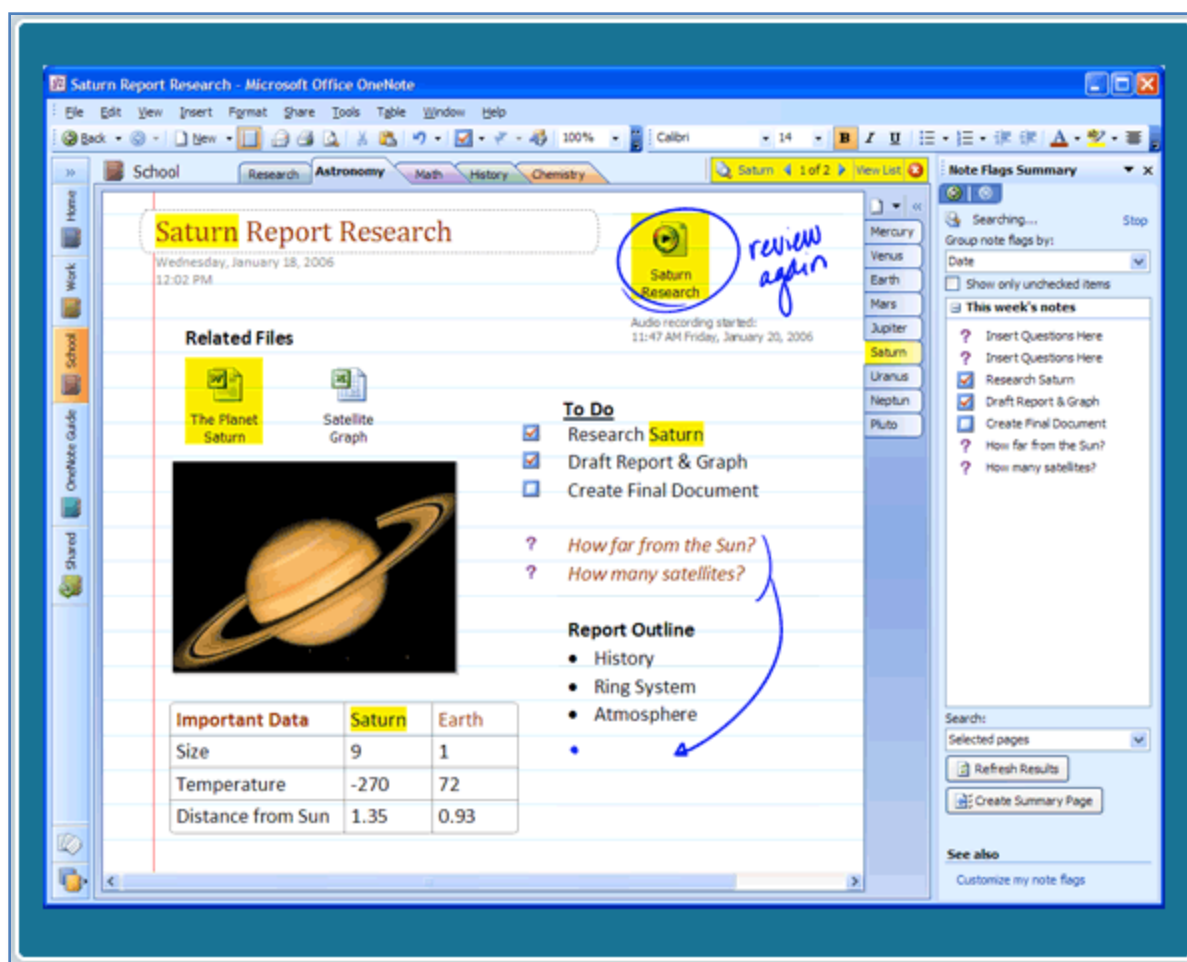
Example OneNote page

For more information about Microsoft OneNote (including a free trial download) see www.onenote.com or see the *Where to go from here?* section at the end of this document.

What is Office Live Small Business?

Office Live Small Business is a free online location that allows businesses to perform a number of functions. Office Live Small Business features web site design tools and hosting, domain name registration and business emails, contact manager, workspace and document management. This document management feature allows you to store and share documents with others across the Internet. Although Office Live Small Business can do many other things it is the storing and sharing of documents, particularly OneNote, that will be of most interest here.
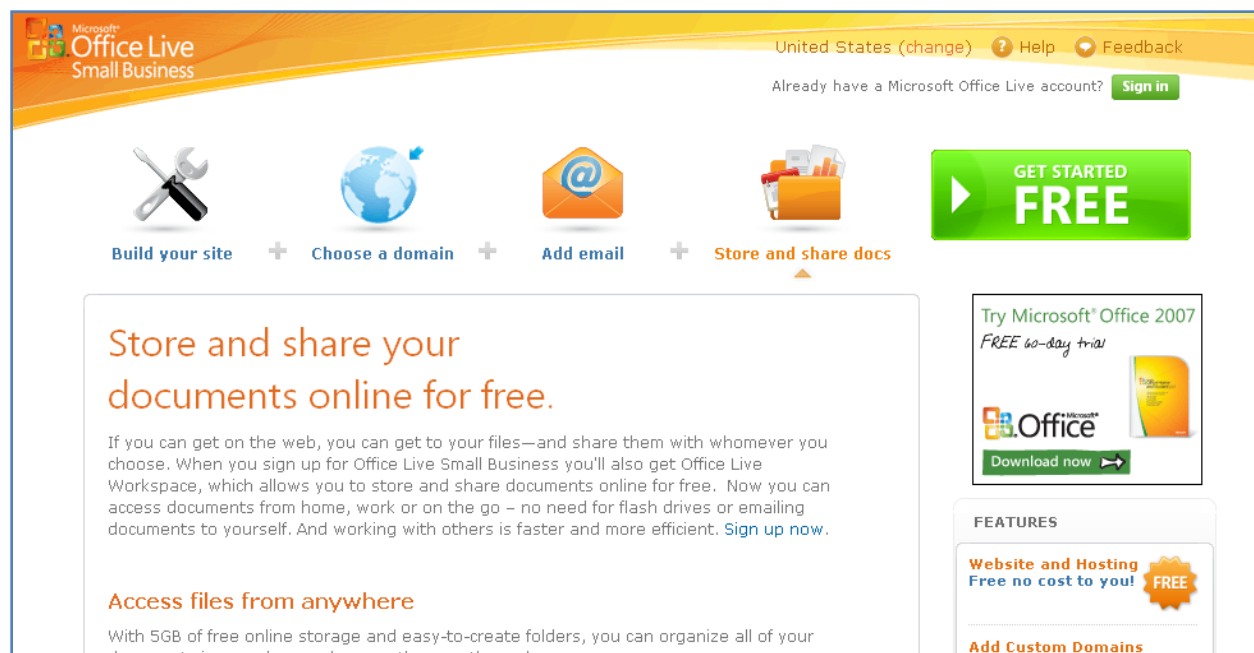
You are able to access documents you save in <u>Office Live Small Business</u> from either a web browser or directly from applications like Word, Excel and <u>OneNote</u> provided you have an active Internet connection. This document will not cover all the aspects and abilities of document management on <u>Office Live Small Business</u>, it will simply show you how to configure and upload a <u>OneNote</u> notebook and make it accessible across the Internet so that it can be used for group collaboration. It is recommended that you take the time to look at all the features that are available with <u>Office Live Small Business</u>.

The way that <u>Office Live Small Business</u> stores and shares documents is very similar to the way it is done with Microsoft <u>SharePoint</u>. If you therefore have an Internet accessible <u>SharePoint</u> site then it is possible to achieve exactly the same result without having to use <u>Office Live Small Business</u>. This document will only cover the use of <u>Office Live Small Business</u> and <u>OneNote.</u> For information about using <u>SharePoint</u> and <u>OneNote</u> please see the *Where to go from here?* section at the end.

## Configuring Office Live Small Business

1. Create login

You will firstly need to create an account on the Small Business version of Office Live which can be found at:

http://smallbusiness.officelive.com/en-us/workspace

Unfortunately, there are other Office Live sites that do not provide a suitable URL for linking and accessing externally, so the account must be created on <u>Office Live Small Business</u>.
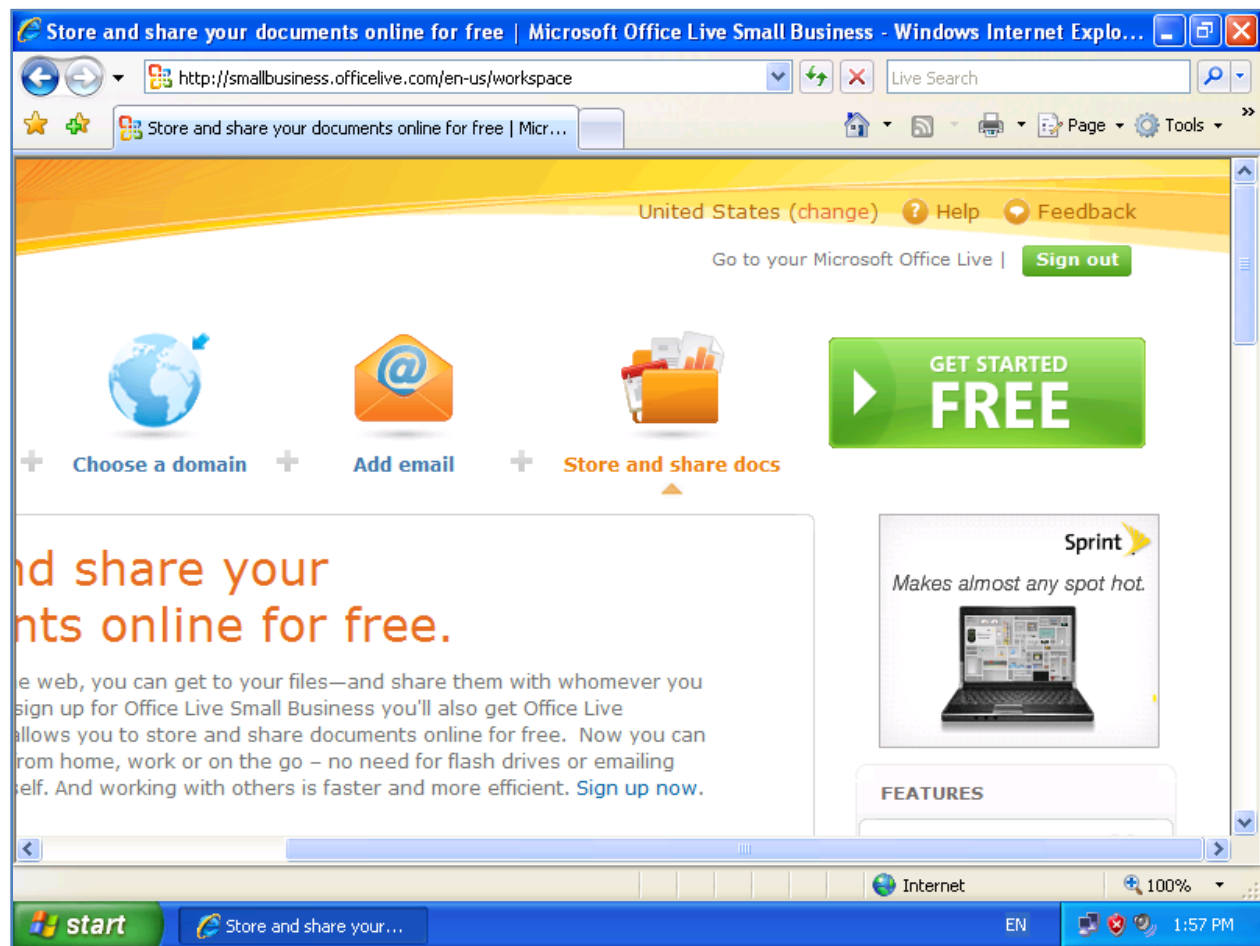

Once on the site click on the **Get Started Free** graphic on the right hand side of the window.
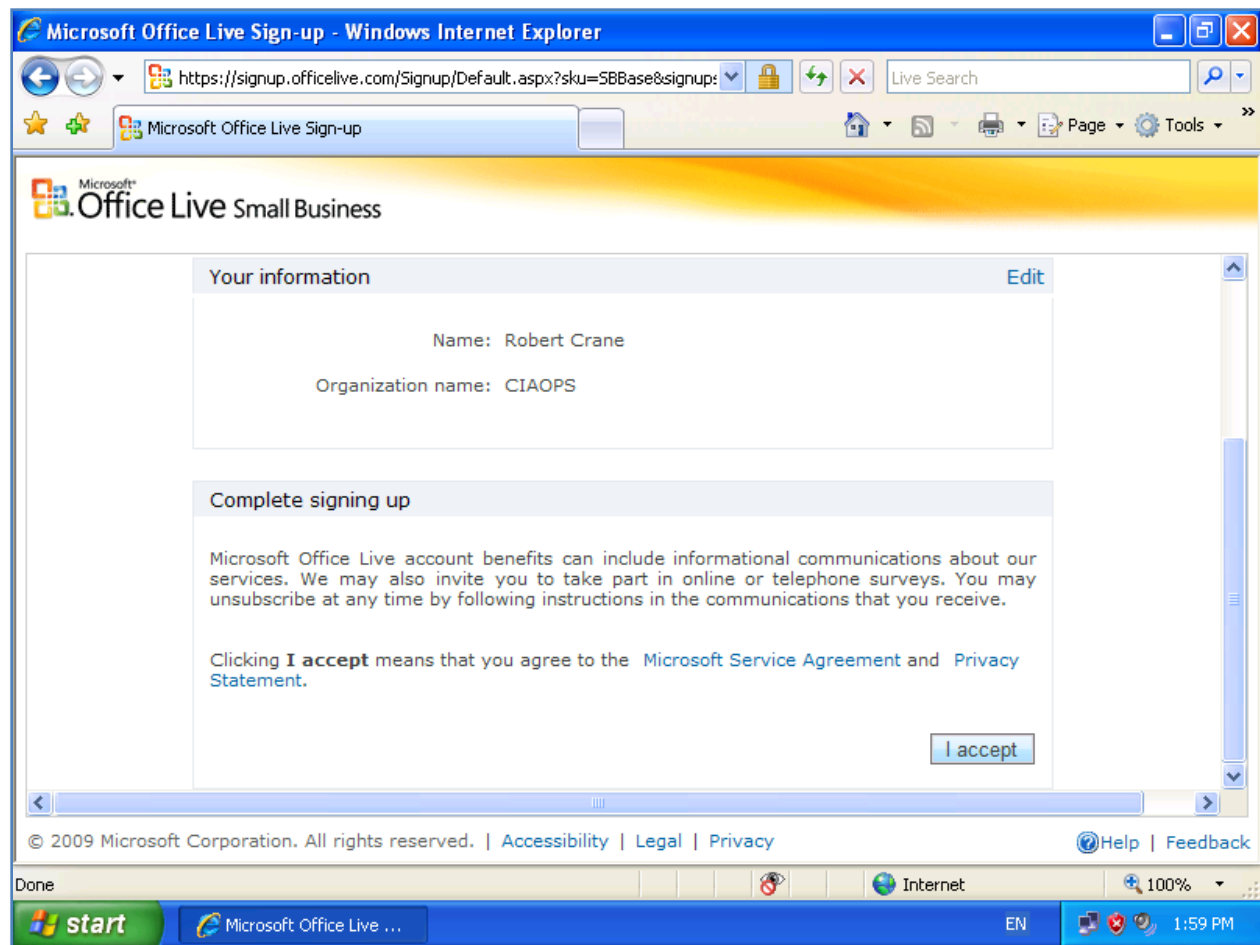
You'll now be asked to create a login based on an email address. If you already have a Windows Live ID you can use that or create a new login and password directly on the site.

The email address you use will need to be valid and active because enrolment information is sent there. This email address and the password will be needed to access the Office Live Small Business site you are creating.
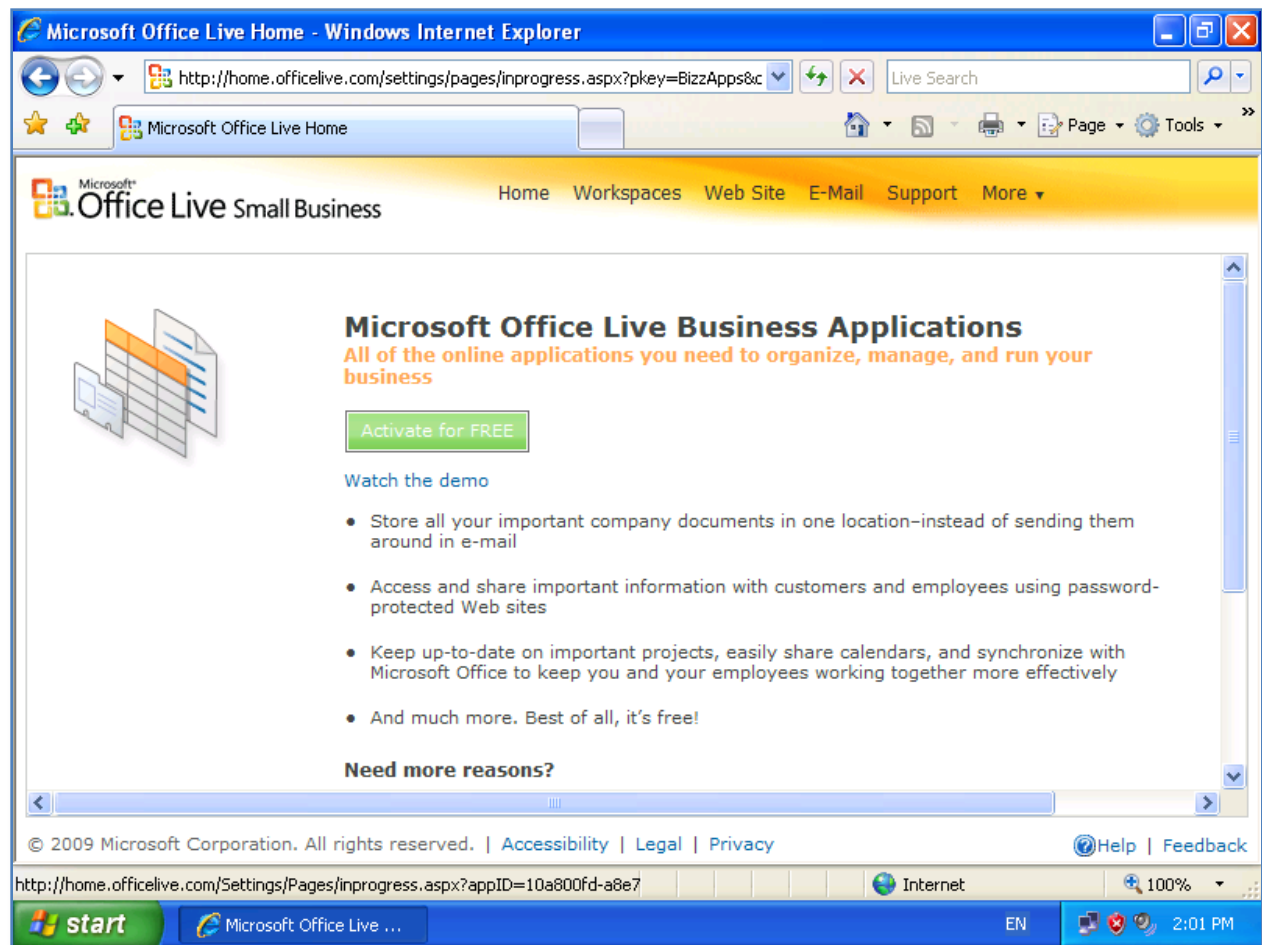
8
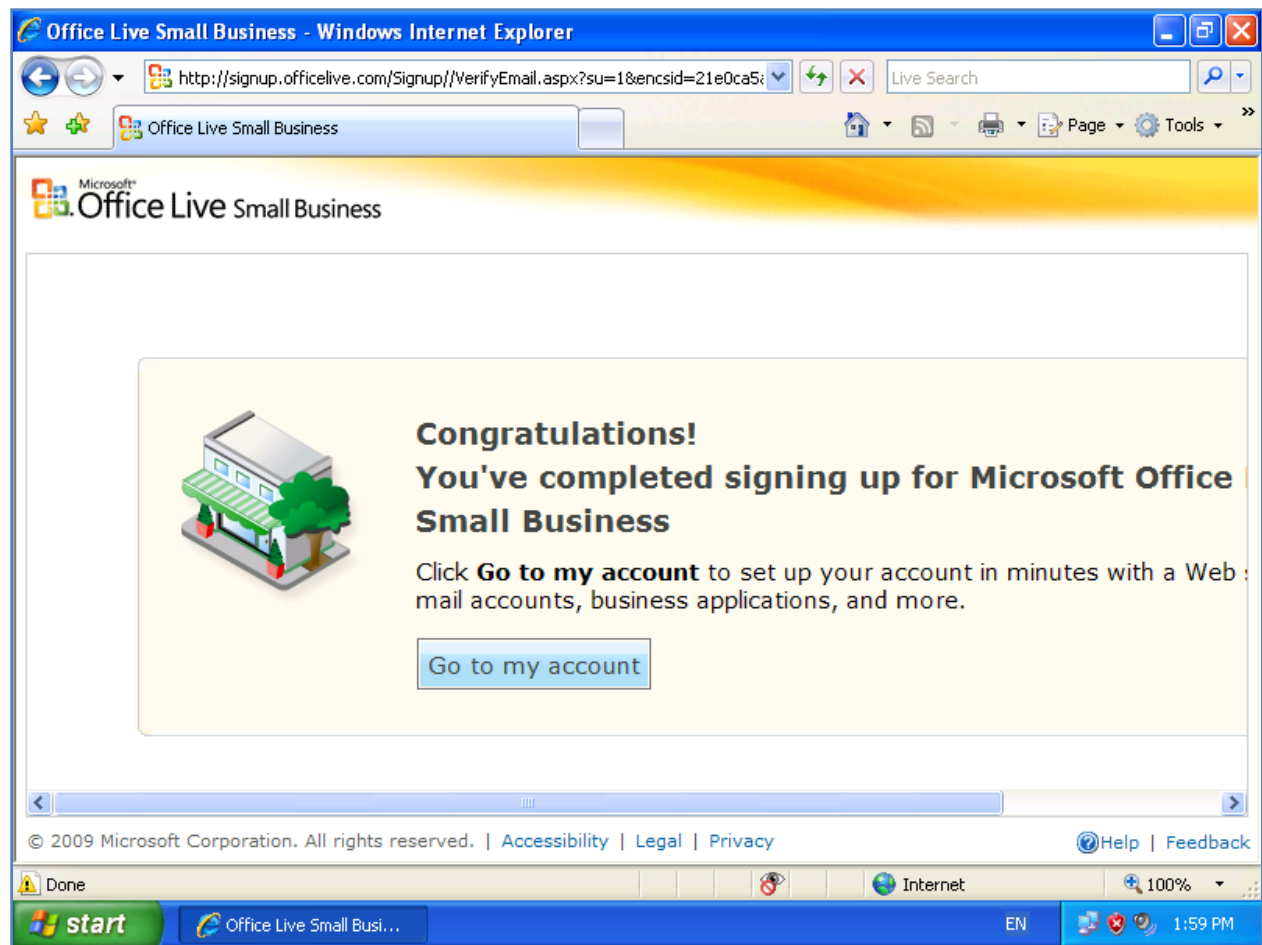
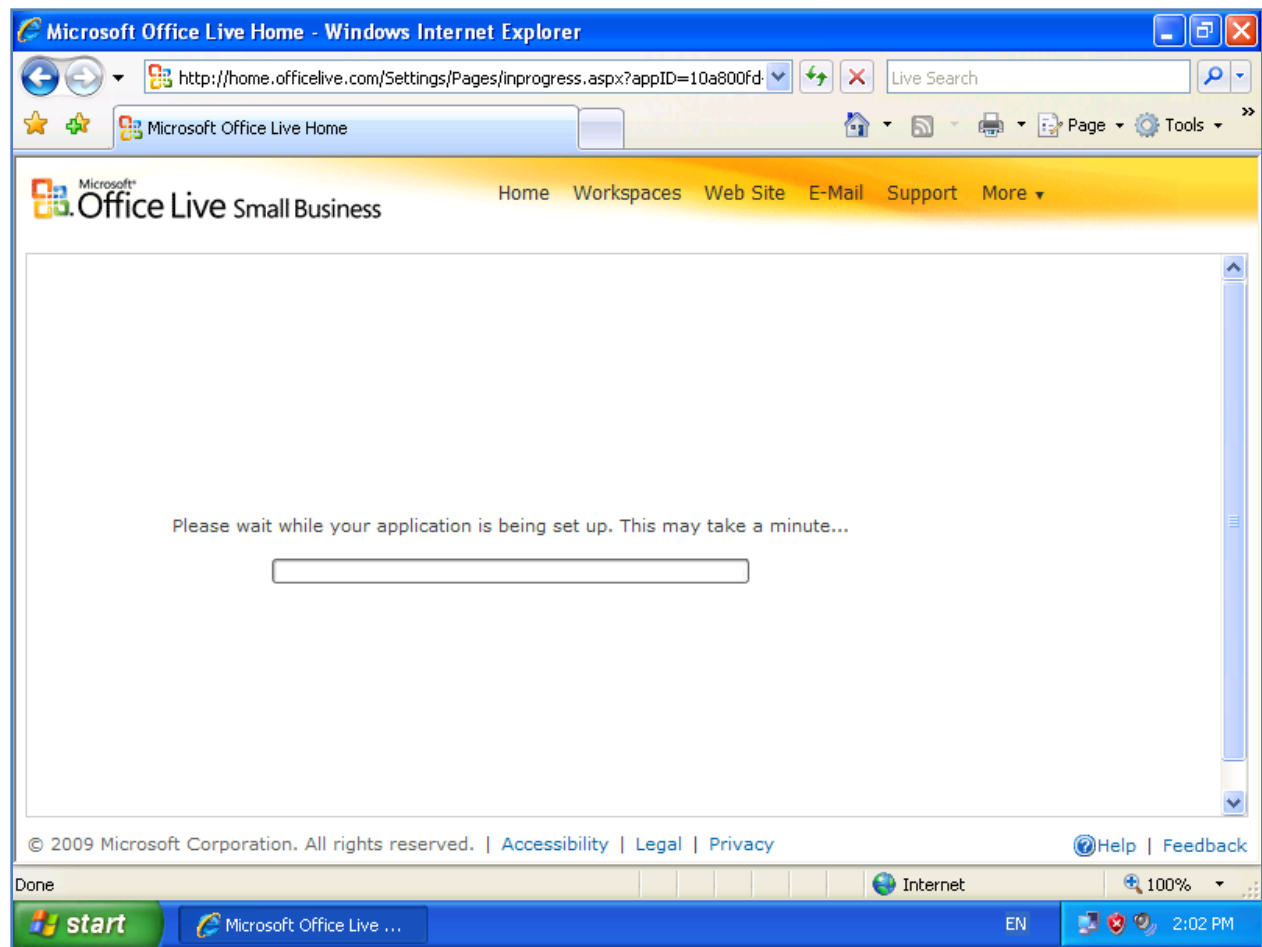Once you have completed the login process select the button to **Go to my account**.
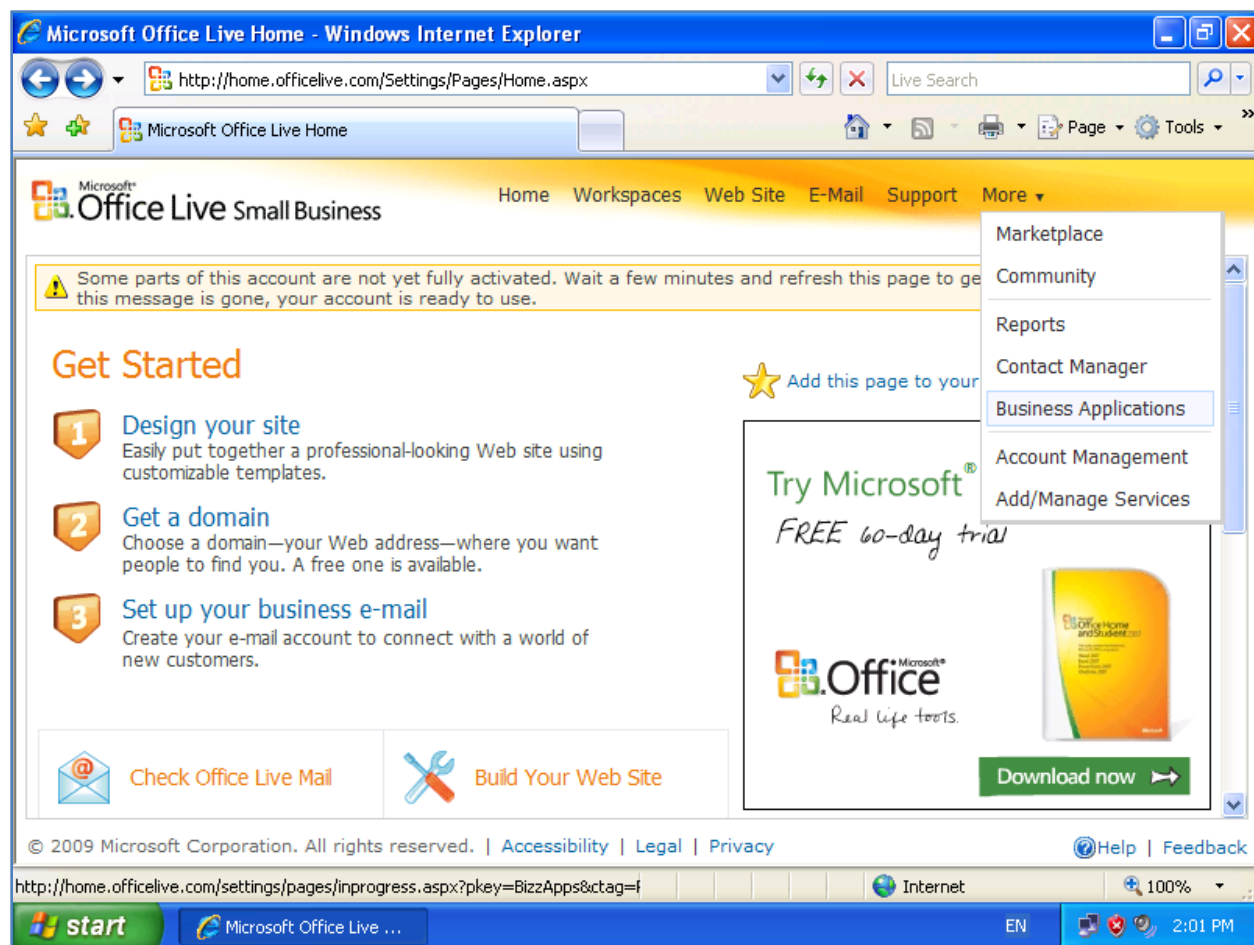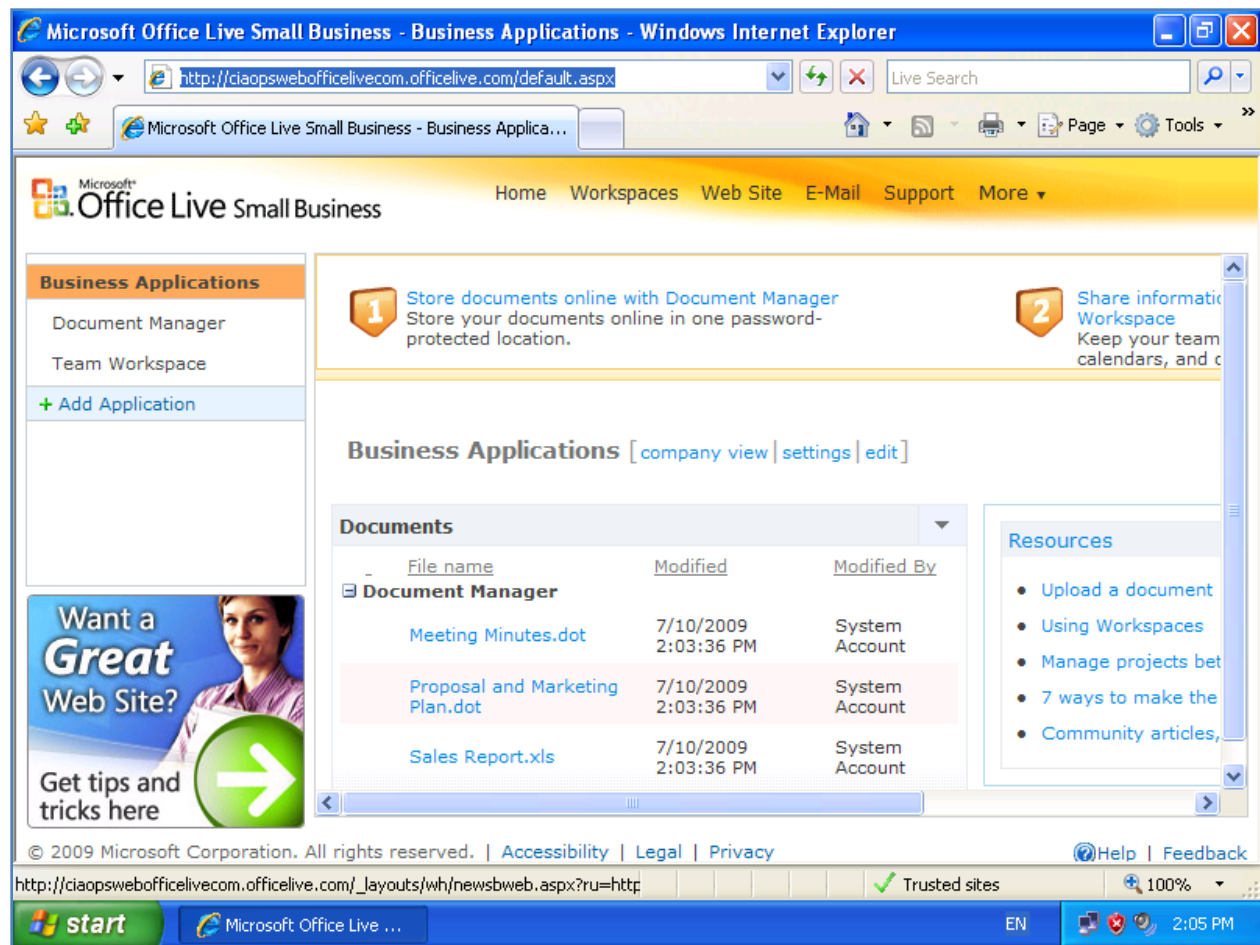
2. Create Document Library

In the top right hand corner of the window pull down the **More** option menu and select **Business Applications** from the menu that appears.

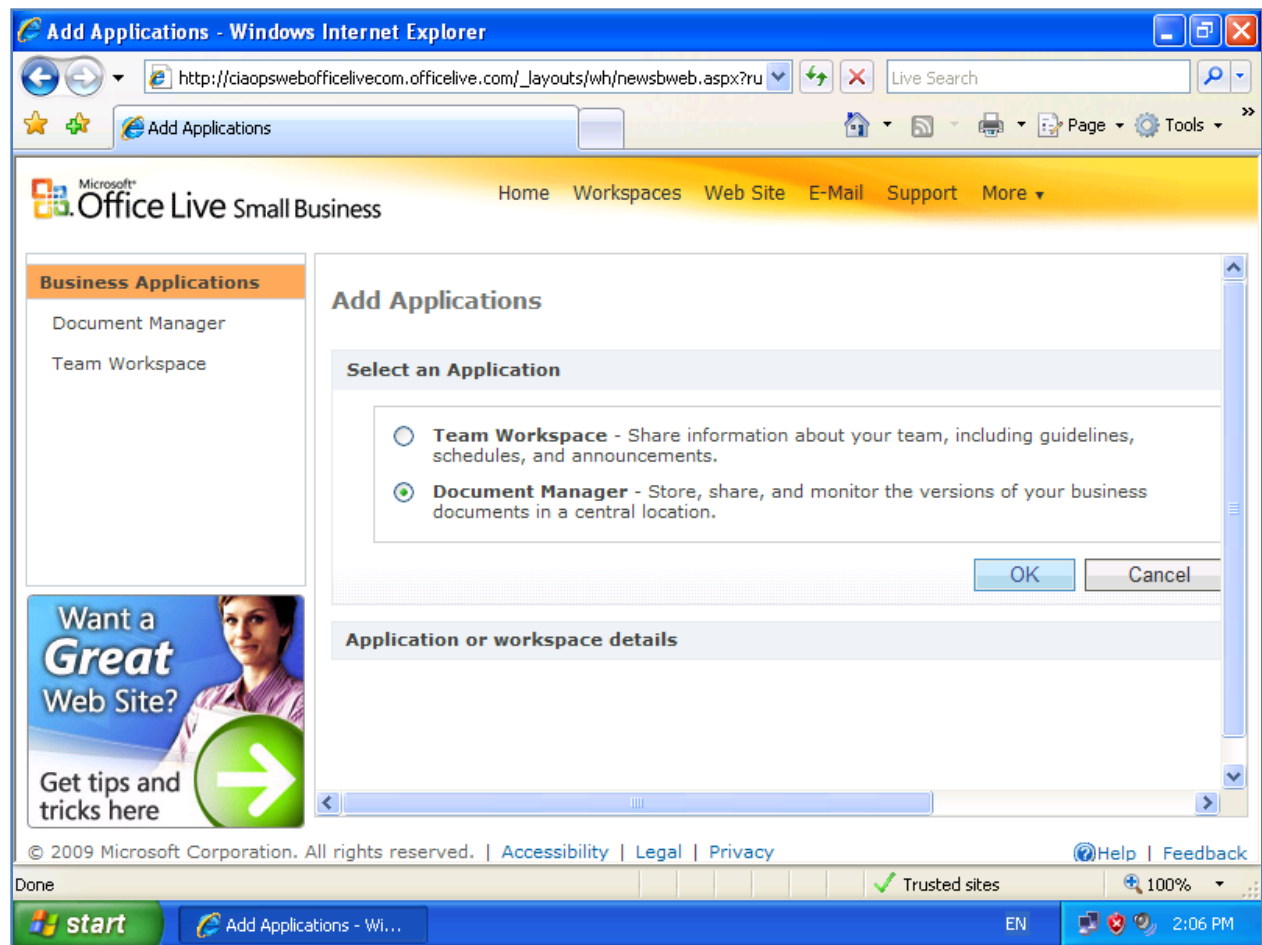Select the button to **Activate for FREE** to continue.

The Office Live Small Business site will now create the Business Applications area for you.
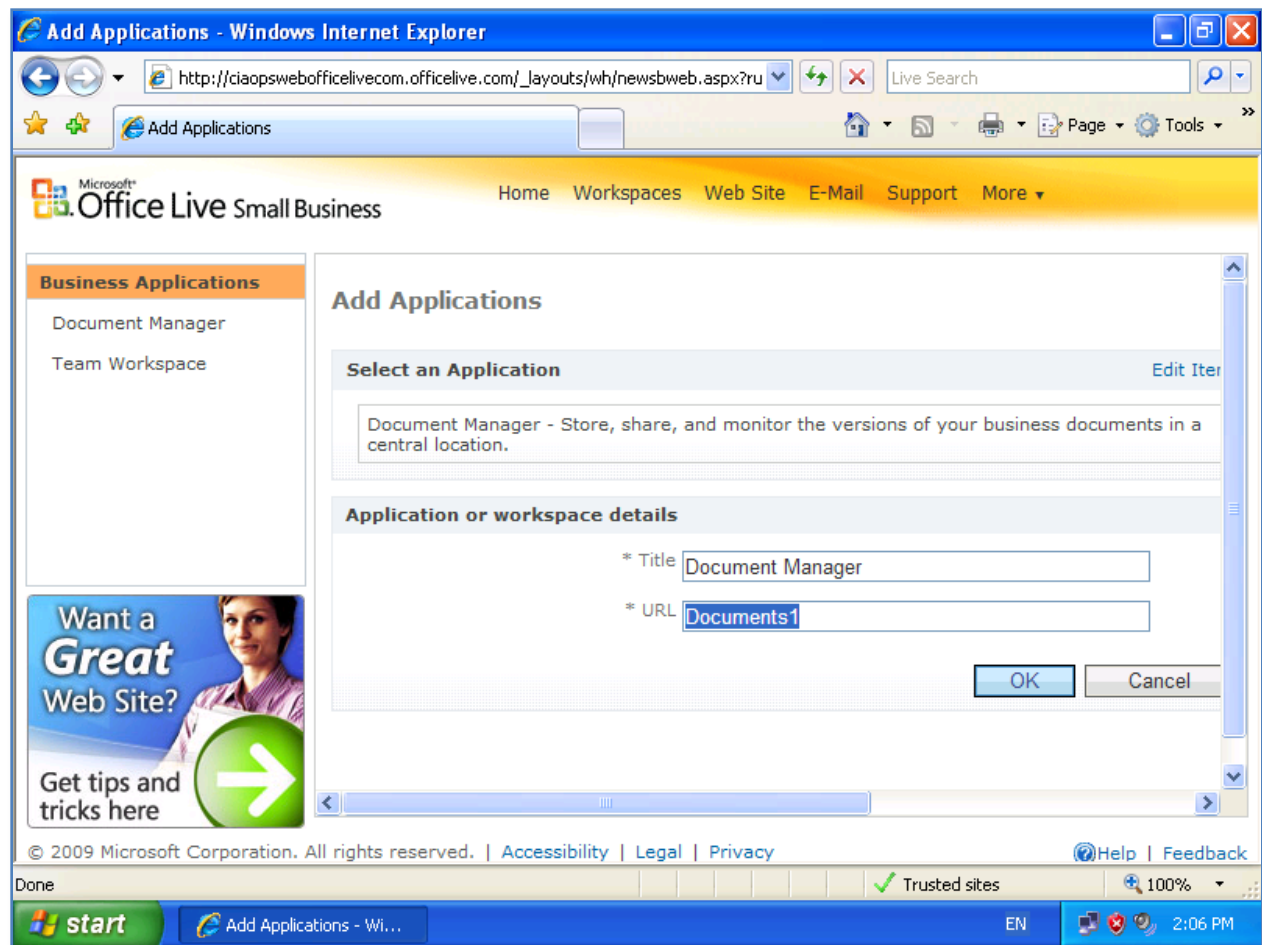
When complete you should see a screen like shown above.

From the *Business Applications* menu on the left hand side click on the option **Add Application**.
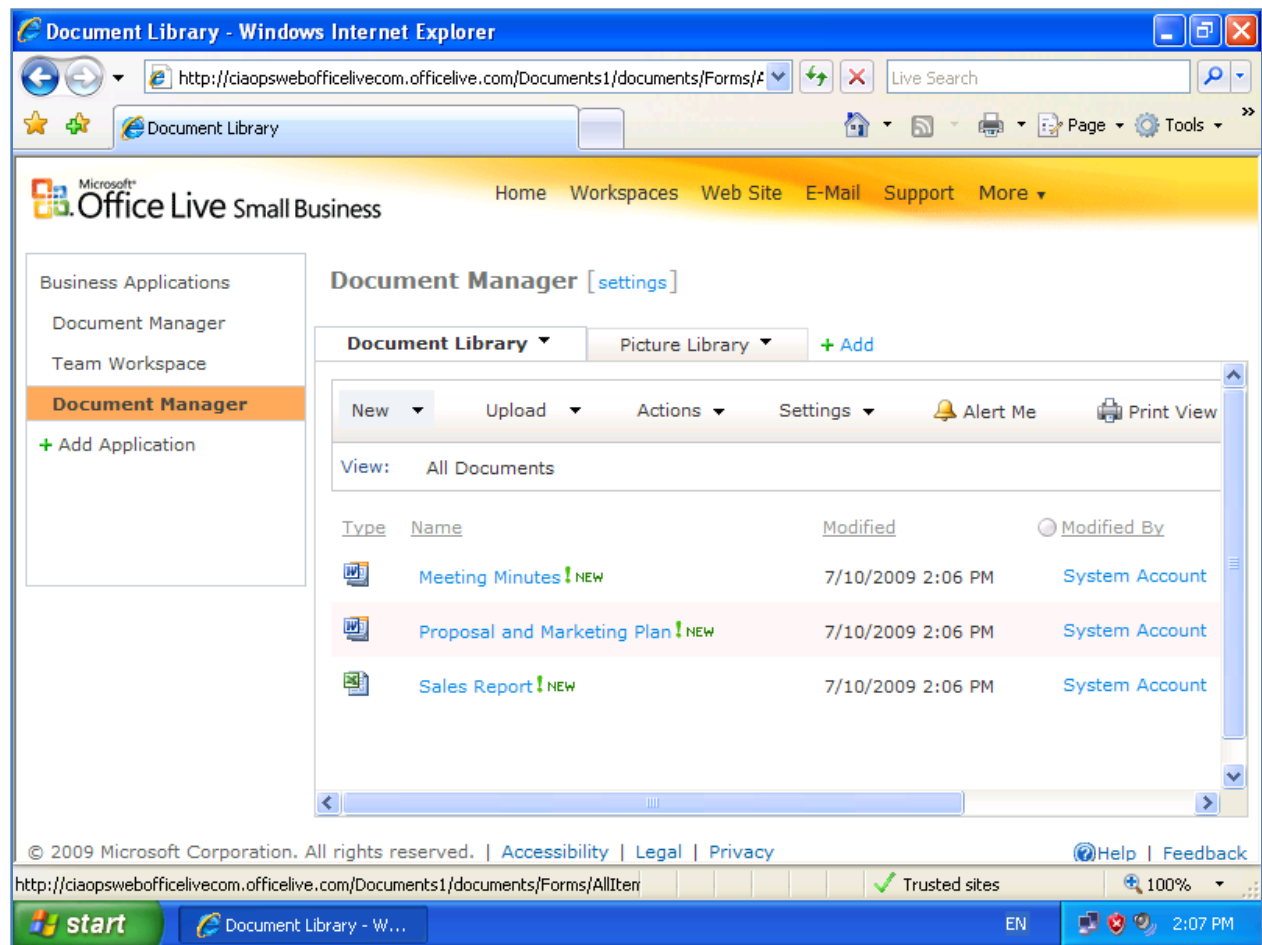
Now select the **Document Manager** option and then press the **OK** button to continue.

Enter a *Title* and *URL* for your application. It is recommended that you keep the URL as simple as possible and avoid spaces and other special characters like)*^%%!.
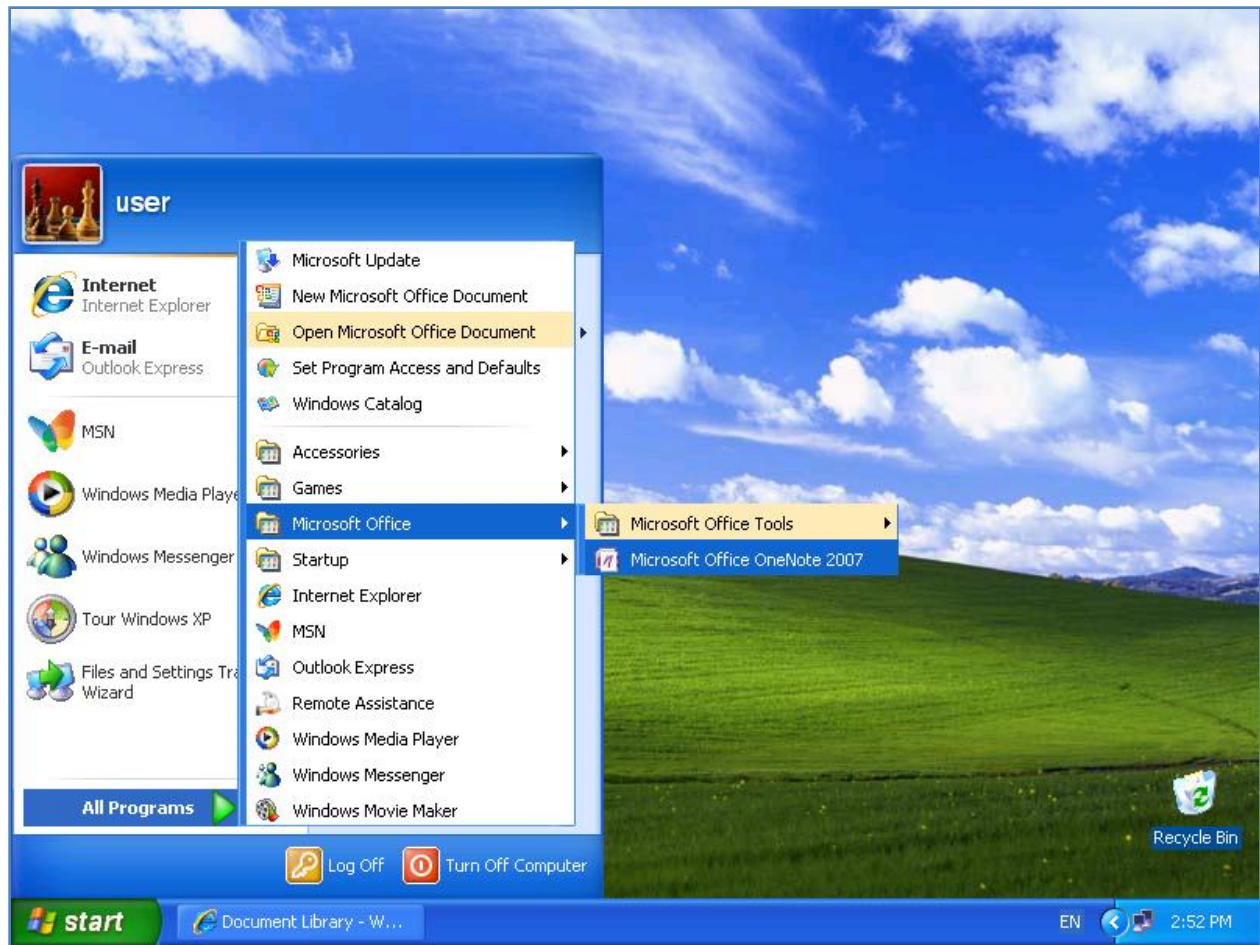
Press the **OK** button to continue.

You will now see your *Document Library* displayed as shown above. You should copy the URL in the browser because this will be required later when a shared notebook is created.
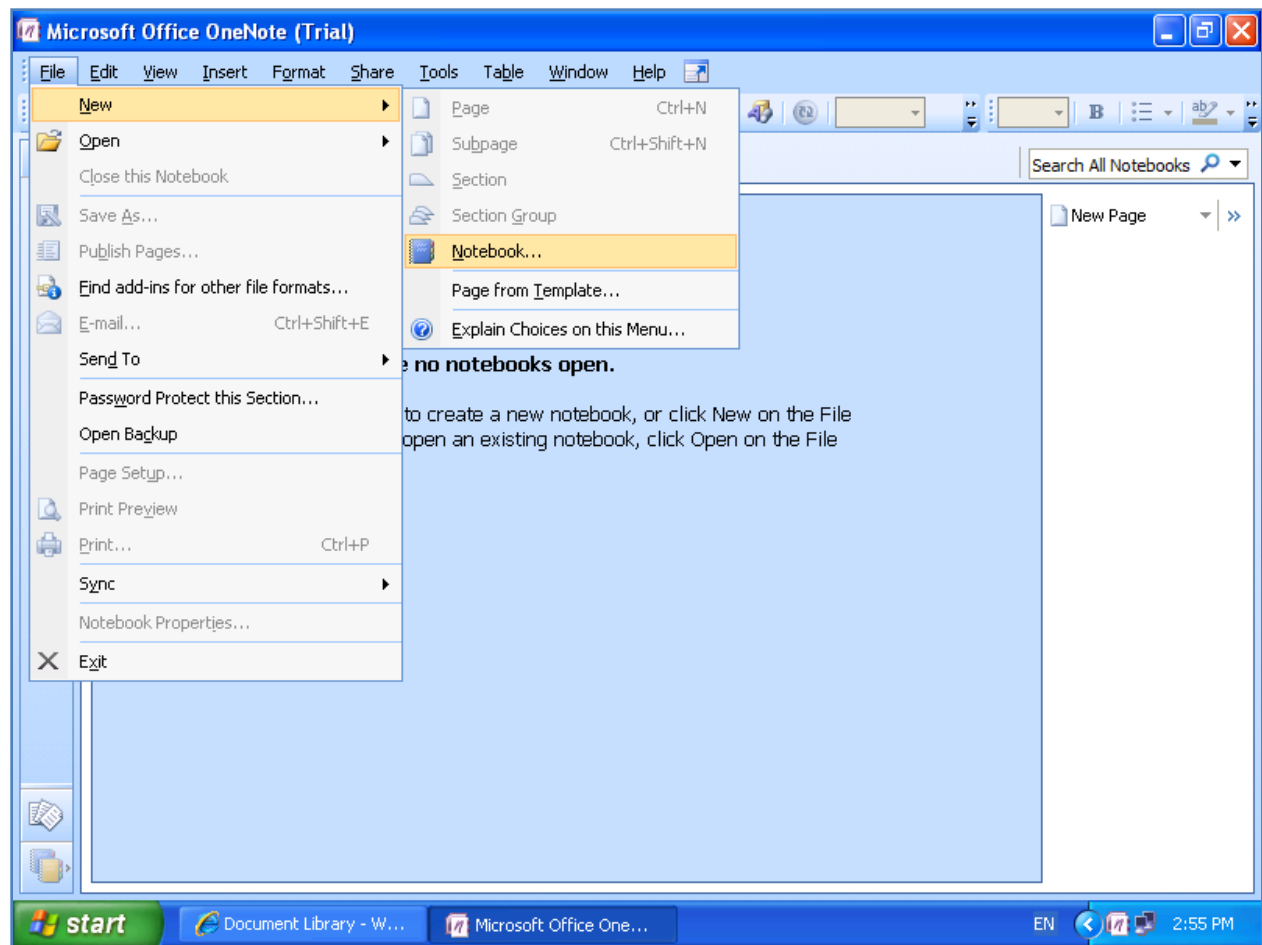
Creating a shared notebook
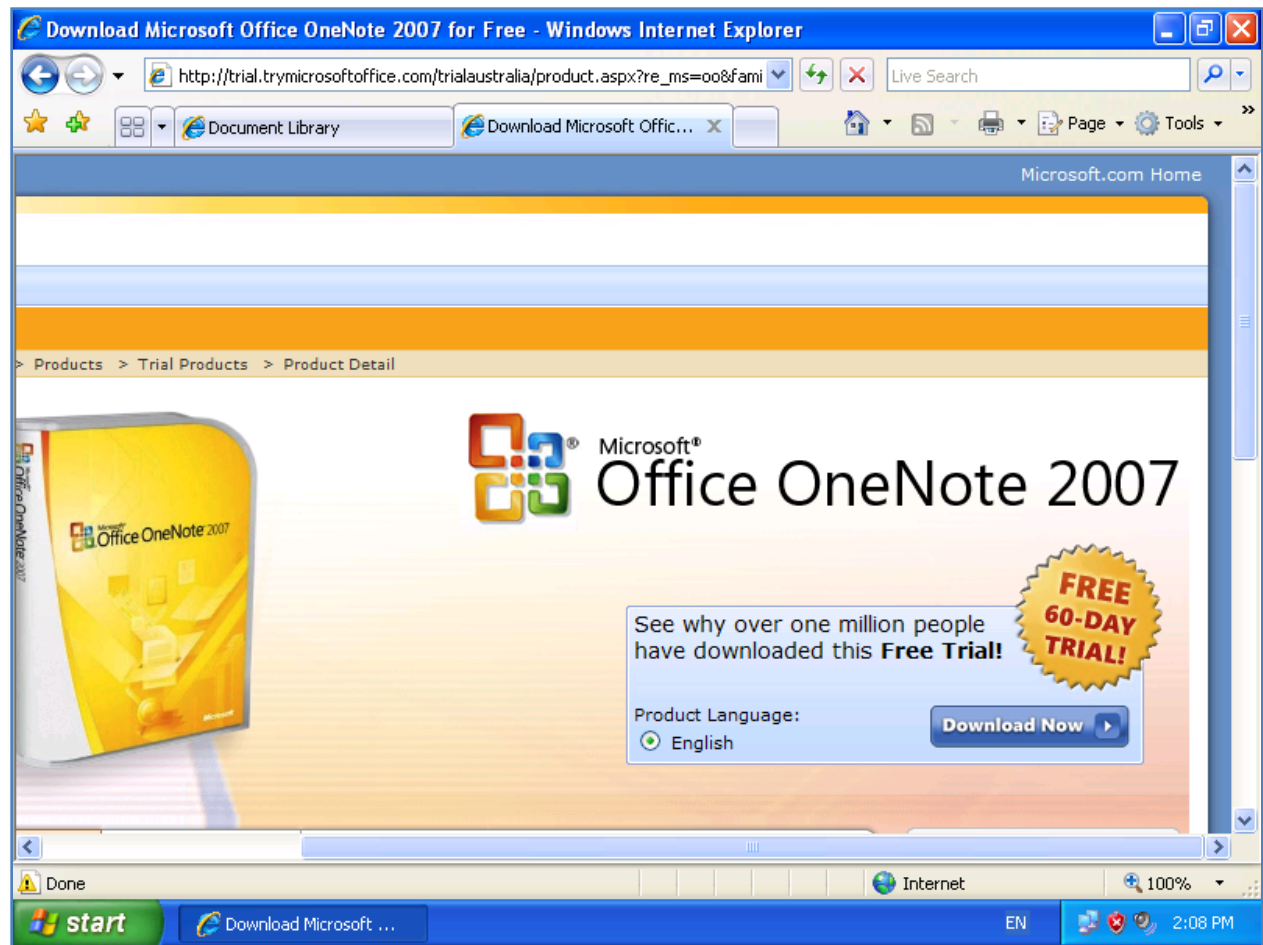
If you don't have a copy of <u>OneNote</u> on your workstation you can always download and install a 60 day trial from:
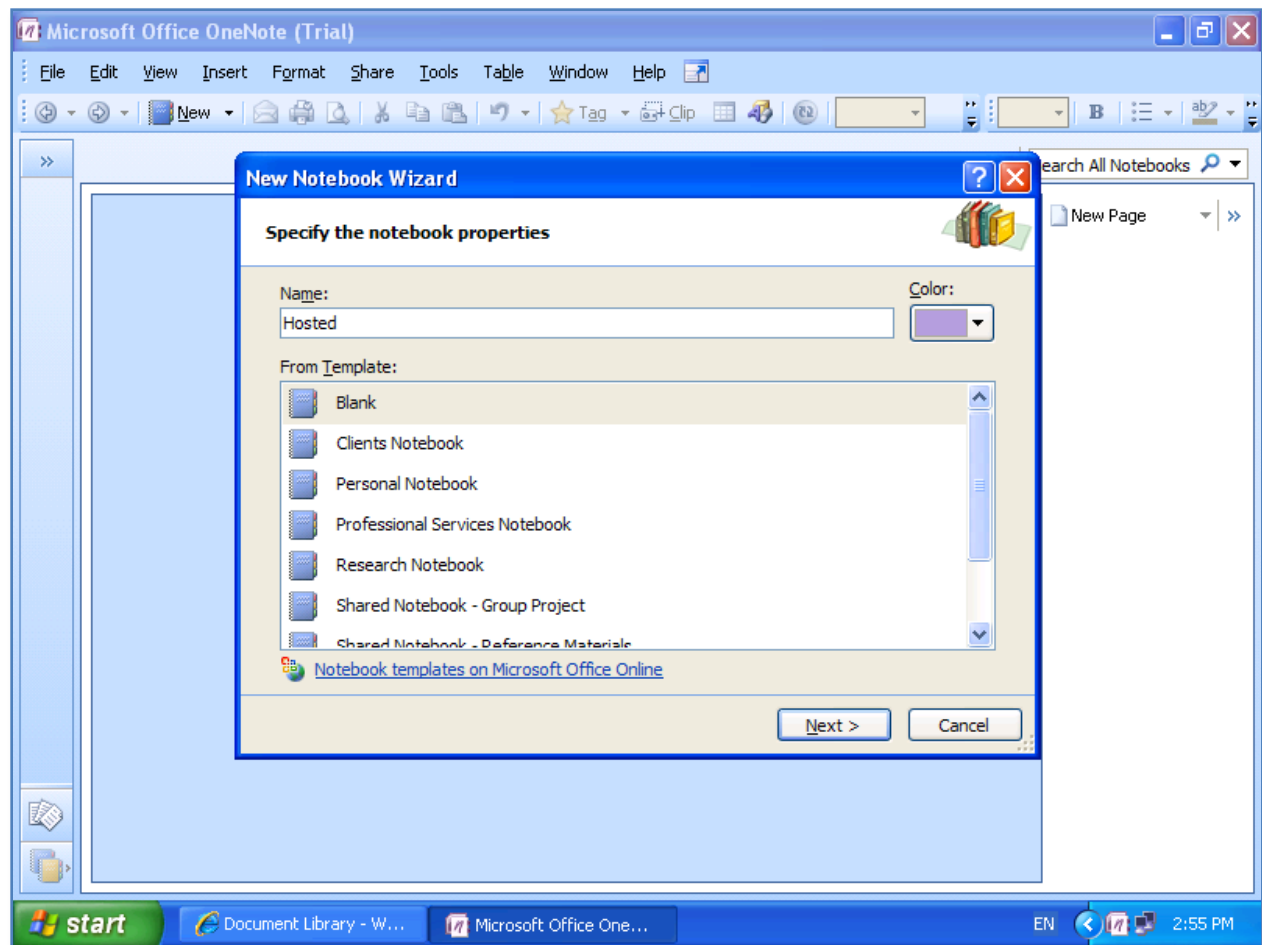
www.onenote.com

Launch OneNote on your workstation. The application is normally found under the Microsoft Office program group in the start menu.
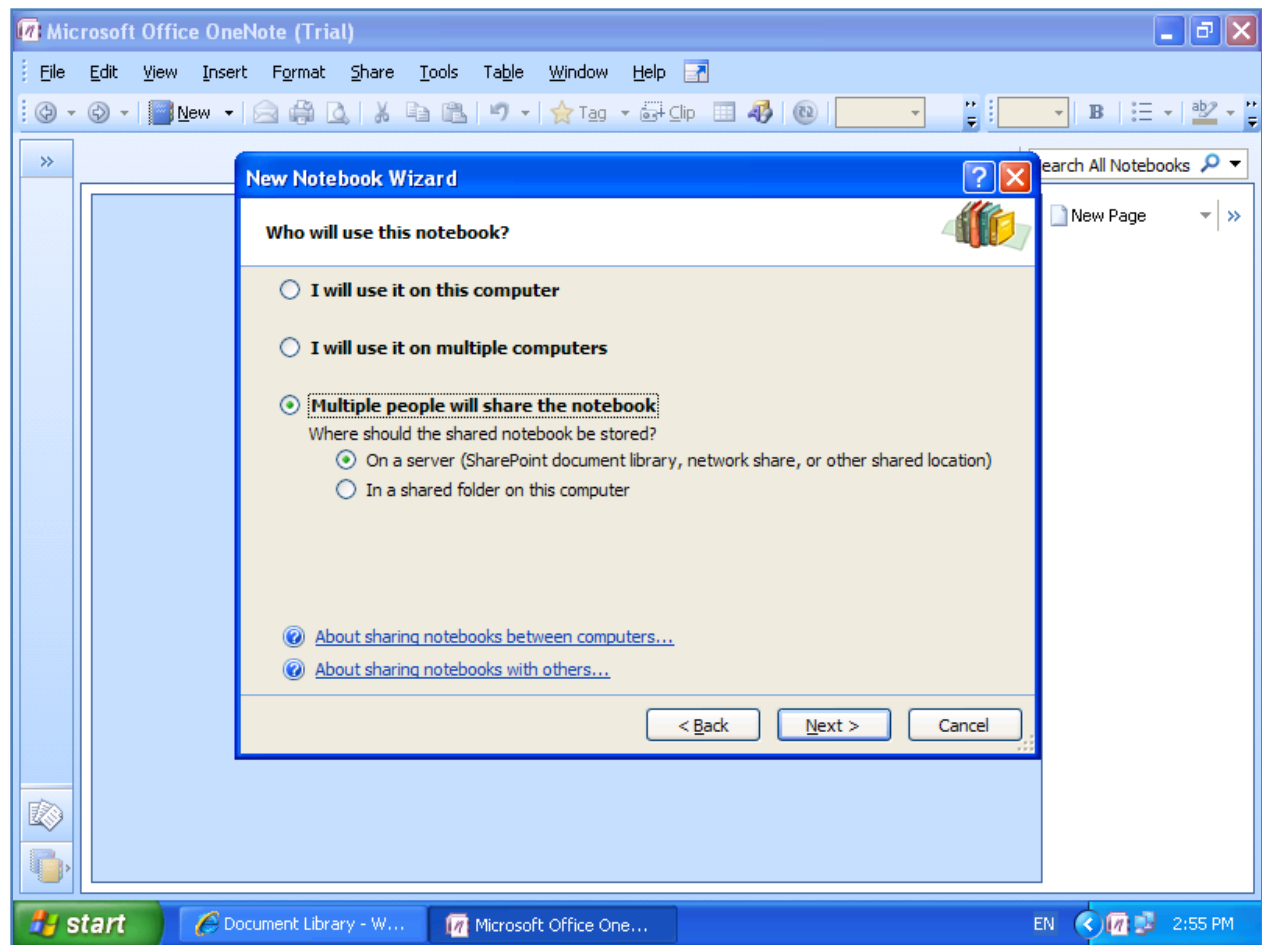
From the **File** menu select **New** then **Notebook**.

Enter a name for the new notebook as well as a template on which this notebook should be based. Again, it is recommended that you use a name that is as short as possible and does not include spaces or special characters.

Press the **Next** button to continue.

To allow the notebook to be shared across the Internet select the last option – **Multiple people will share the notebook**. Then ensure that the location of where the notebook is stored is **On a server** by selecting that option.

Press the **Next** button to continue.
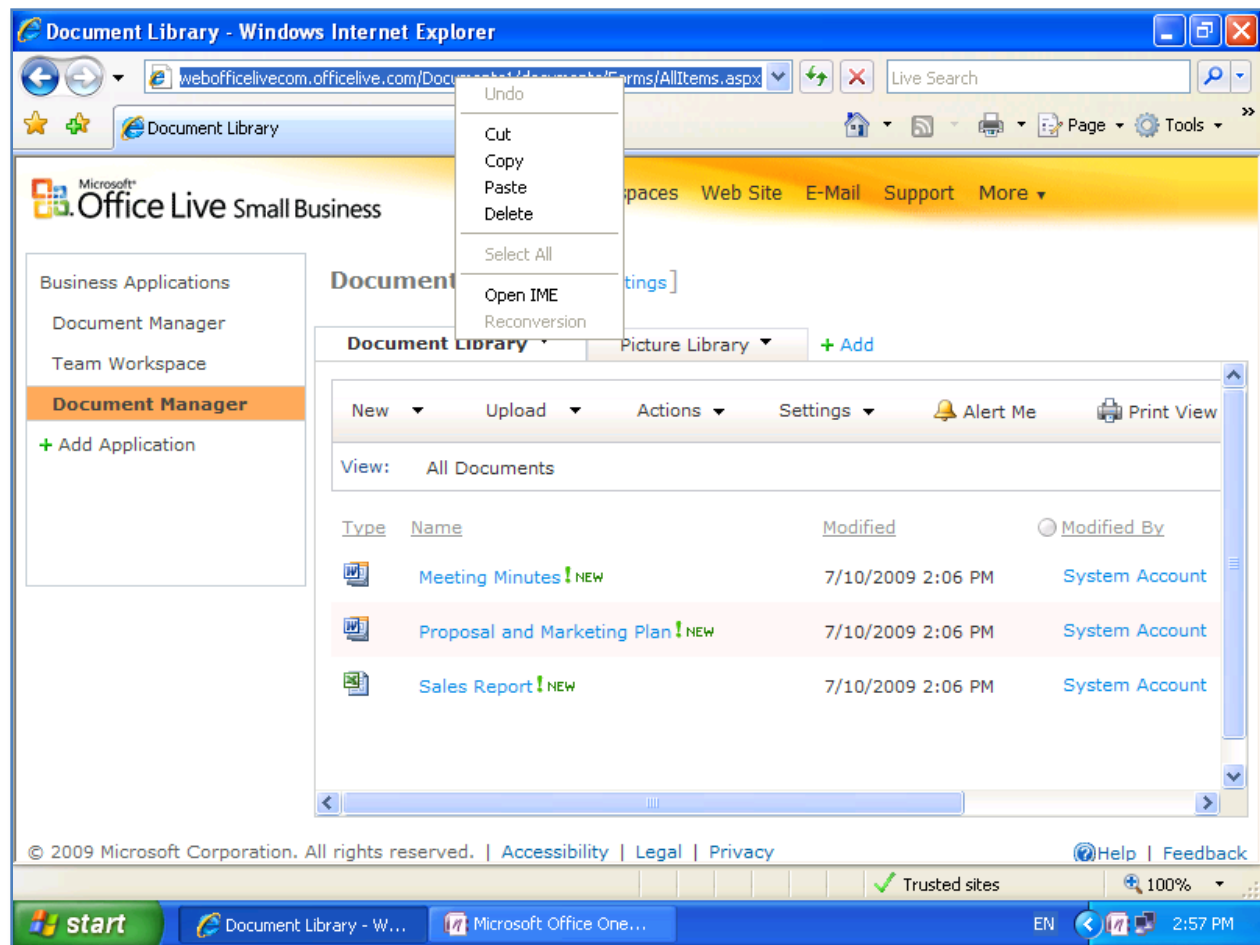
Return to the *Document Library* location in <u>Office Live Small Business</u> in the browser and copy the URL for the library.

You do this by selecting the whole address line, **right mouse clicking** on the highlighted address and selecting **Copy** from the menu that appears.
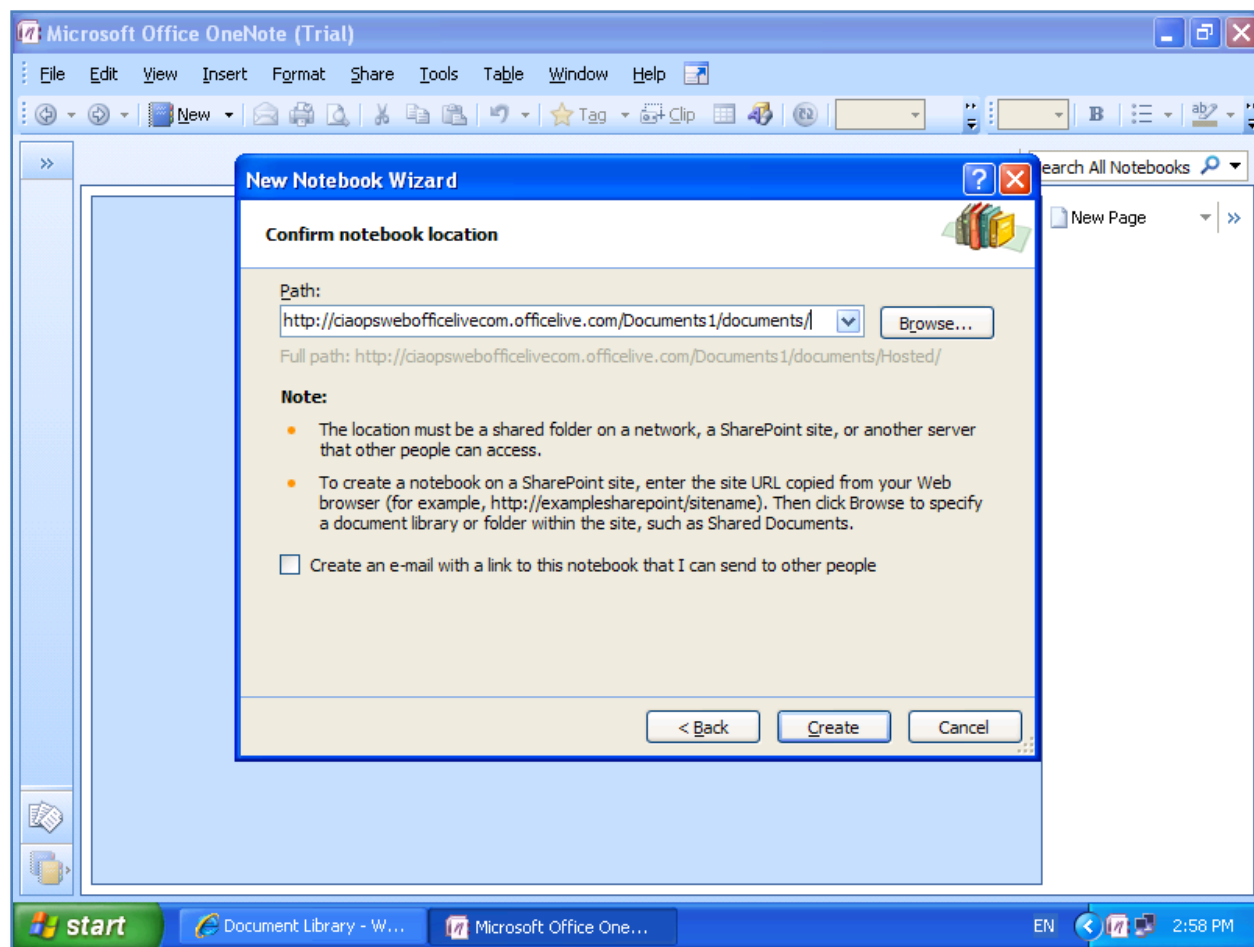
Now paste the full URL into the *Path name* for the location of the notebook. Before proceeding, remove the trailing elements so the last part of the path is only /documents/. This address is the URL of the document library in Office Live Small Business.

Unselect the option further down, *Create an e-mail with a link to this notebook*, unless you wish to email others with details of how to access the shared notebook.

Press the **Create** button to proceed.
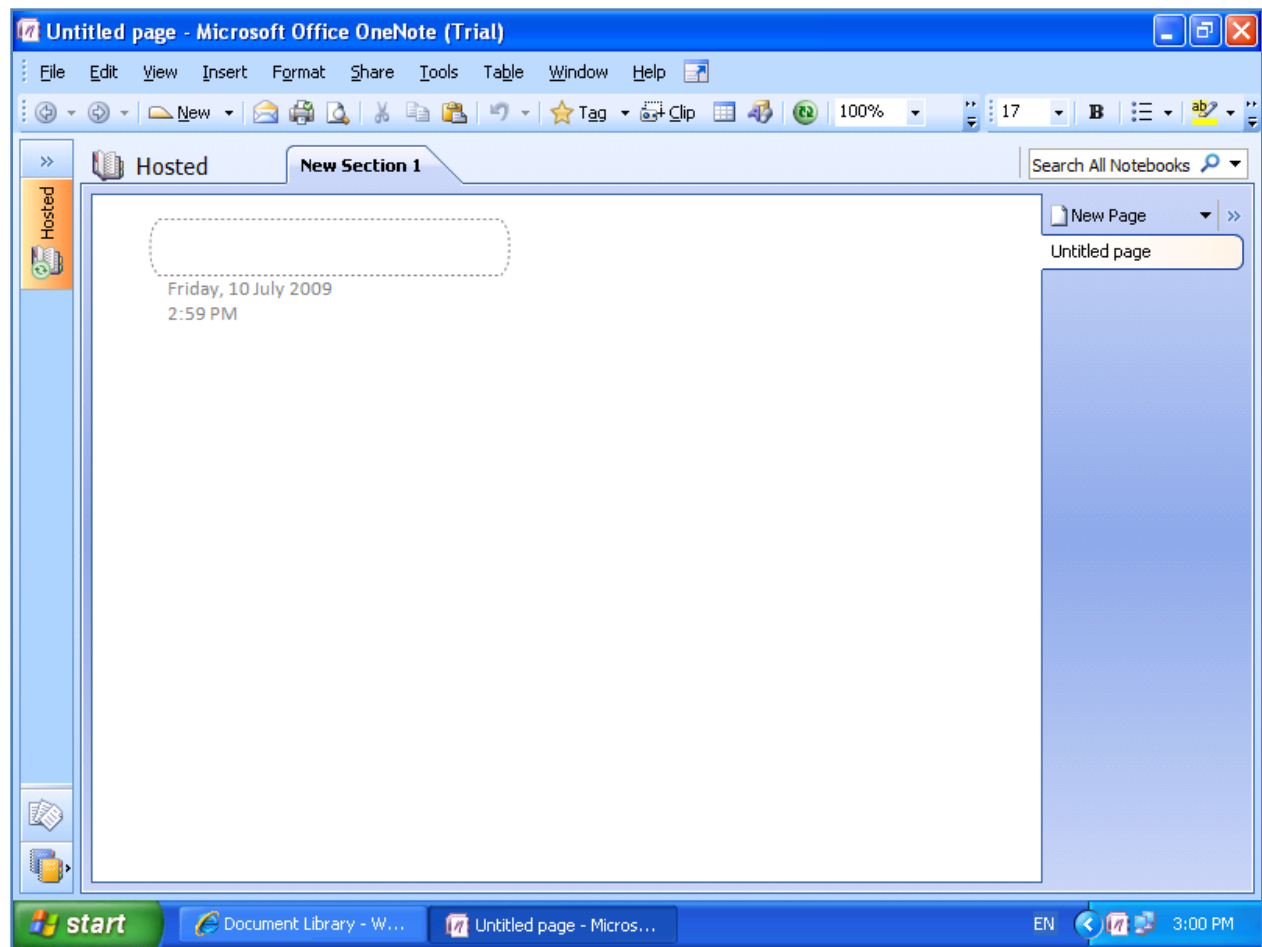
The new notebook should now be open on the screen.

Checking notebook location
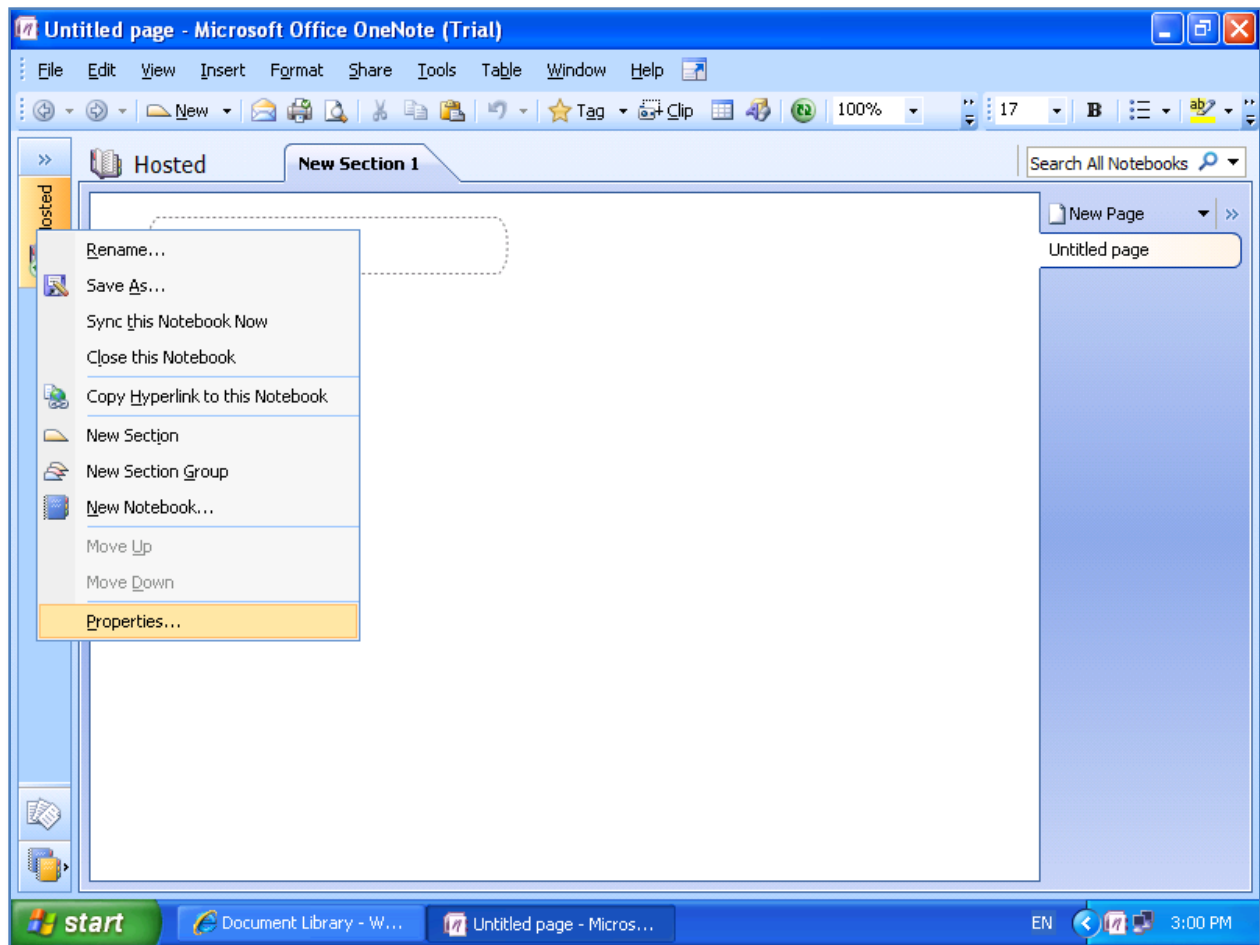
If you now **right mouse click** on the notebook at the left edge of the screen and select **Properties** from the menu that appears.
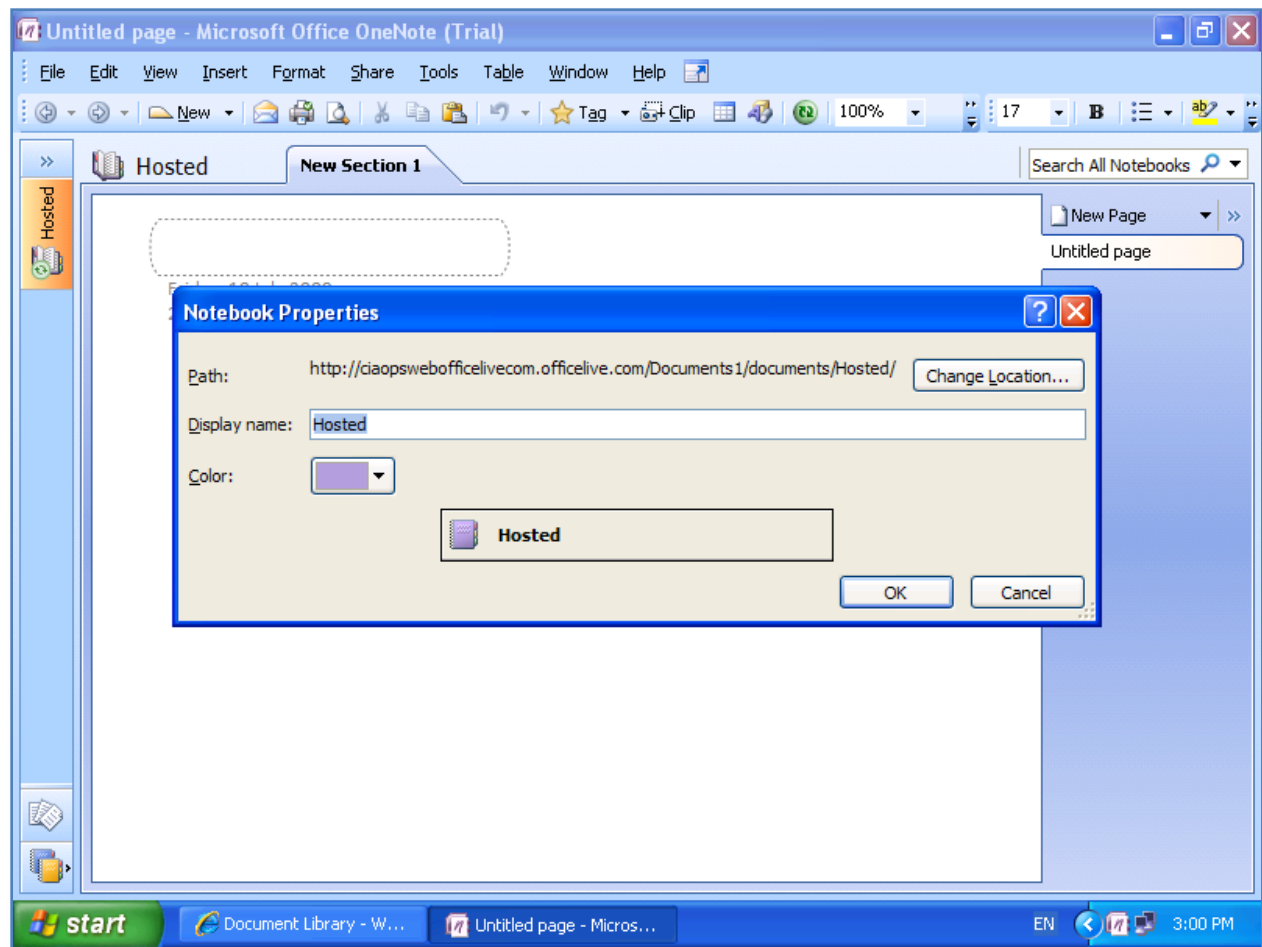
You should now see that the path of the notebook refers to the URL of your Office Live Small Business site.

Press **OK** to close the *Notebook Properties* window.
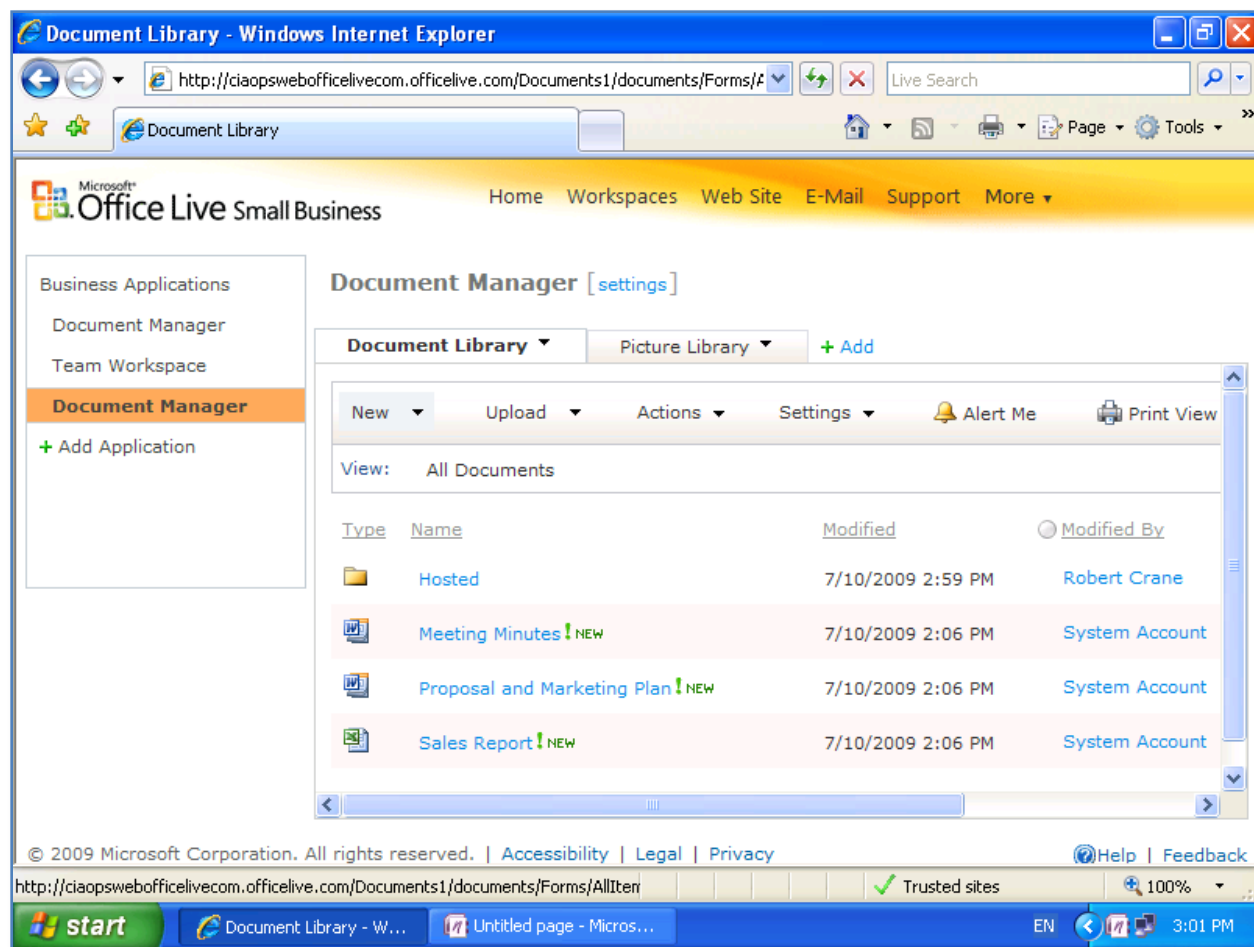
If you now return to the Office Live Small Business *Document Library* in the browser and refresh the page you should see an additional folder displayed (in this case Hosted). Inside this folder will be where each section of the notebook is stored as an individual file.
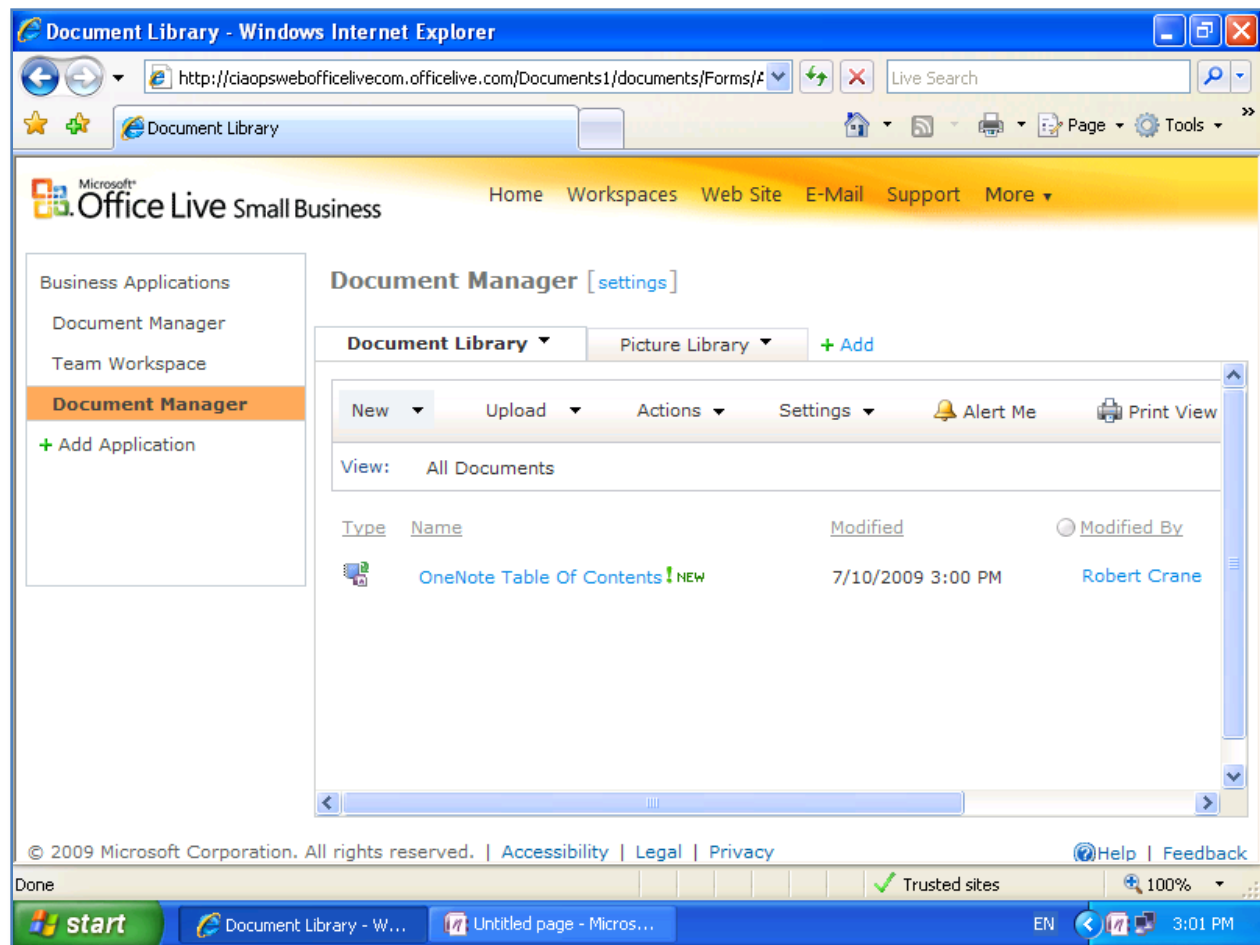
If you then **click** on the new folder to open it you will see the OneNote files displayed.

Accessing existing shared OneNote files
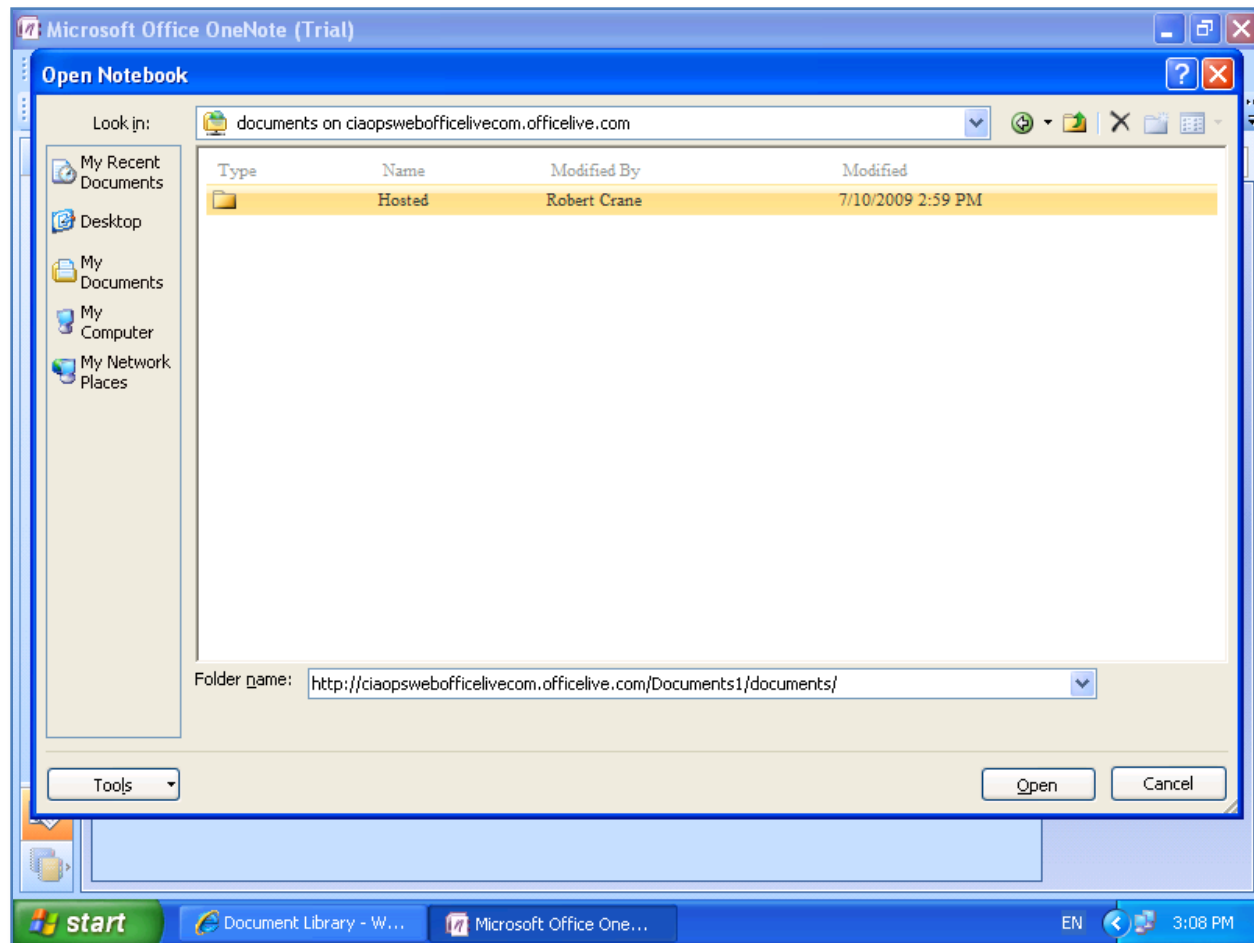
If you now wish to use the notebook you just created on another workstation simply launch OneNote on that machine and select **File** then **Open** then **Notebook**. When prompted for a *Folder name* simply enter the URL of the Office Live Small Business workspace *Document Library* where the notebook is located, like shown above. Then press **Open**.
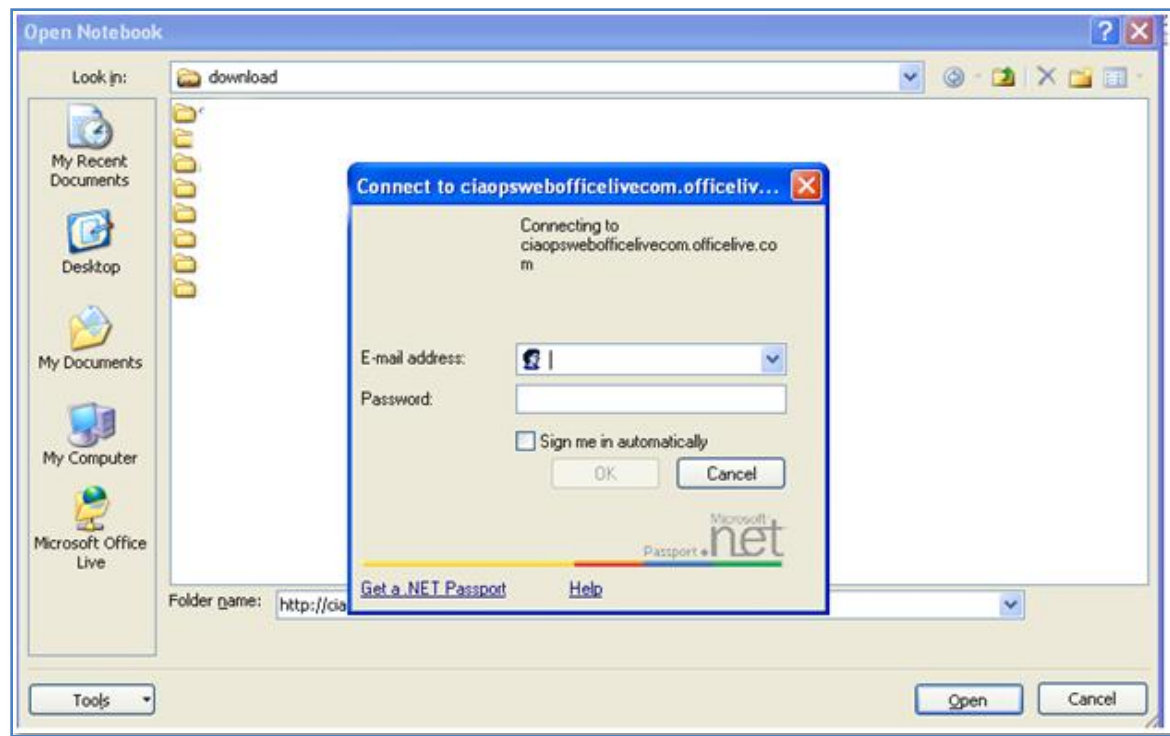
You will be prompted to enter you Office Live Small Business login and password. This is the email address and password you used when you first created the Office Live Small Business workspace.

You should then see the OneNote folder displayed like shown below.
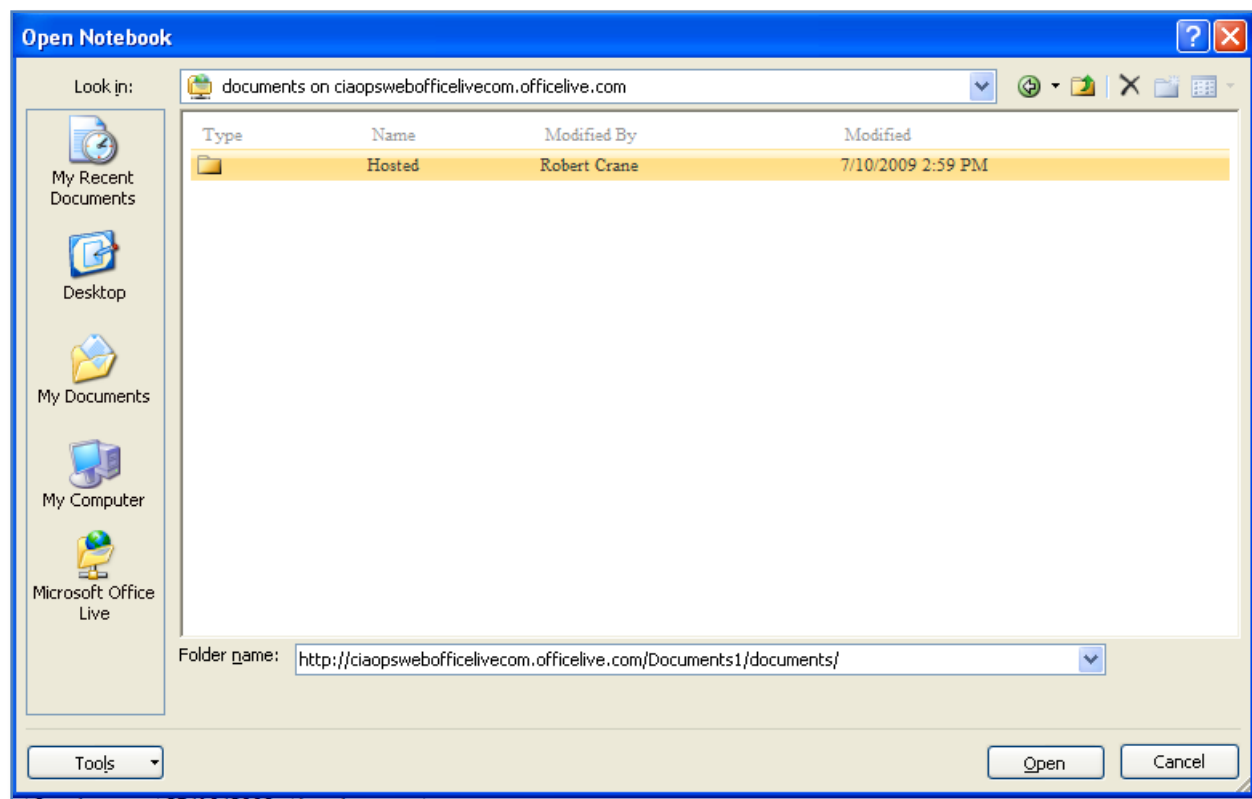
Select the OneNote folder and press **Open** and the Notebook will open.

When the notebook is opened it will automatically synchronize with Office Live Small Business almost instantaneously (depending on what has changed since the last time it was opened on that machine).

Each time you open the notebook you will be prompted to enter the login for the Office Live Small Business site so the notebook can synchronize. You can always choose to work with the notebook offline and synchronize you changes at a later stage if desired. This is a great option for when you don't have the Internet available.

It is also now possible for multiple people to access the notebook across the Internet provided they have OneNote installed on their workstation. Office Live Small Business allows you to create multiple logins for access to the online documents. This means you could create a unique login for each member of your team and give them separate rights. However, all you need is a single login and the OneNote URL for sharing to take place.

Where to go from here?

There are many features of both <u>Office Live Small Business</u> and <u>OneNote</u> that haven't been covered here. If you can see the benefits of these products it is recommended that you spend the time and take a closer look at the functionality that both provide.

As has already been mentioned it is possible to achieve the same collaboration results with Microsoft <u>SharePoint</u> and <u>OneNote</u>, since <u>Office Live Small Business</u> is basically a hosted version of <u>SharePoint</u>. <u>SharePoint</u> offers a number of additional capabilities such as wikis, blogs, version control and so on. Windows <u>SharePoint</u> Services is a free download from Microsoft and can generally be installed on any Windows Server product.

Further documents and information about utilizing the advanced features of <u>OneNote</u> and <u>SharePoint</u> can be found at http://www.ciaops.com and http://supportweb.ciaops.net.au. If you are interested in receiving information about any upcoming documents please send an email to director@ciaops.com asking to be added to our regular newsletter.

If you have any feedback on the information provided here please contact director@ciaops.com.

Computer Information Agency
http://www.ciaops.com

Glossary

OneNote – A component of Microsoft Office that provides electronic notebook functionality. It allows the storage and indexing of a variety of data including text, graphics and clippings. It can be used on a shared location to allow team collaboration. More information is available at http://www.onenote.com.

SharePoint – Is available from Microsoft in two versions Microsoft Office SharePoint Server (MOSS) and Windows SharePoint Services (WSS). SharePoint provides many collaboration capabilities including document versioning and approval, wikis, blogs, survey and project management via a graphical interface. SharePoint can be usually be installed on any Microsoft Windows Server. More information is available at http://sharepoint.microsoft.com.

Office Live Small Business – Is a free online service hosted on Microsoft servers that allows businesses to create web sites, host domains, created shared document space, host emails and contacts, and more via internet access. All the information is save to online servers 'in the cloud' which means it is available where ever access to the Internet is available. To use the service simply create a login via http://smallbusiness.officelive.com. You are able to pay for additional features like enhanced storage space if desired.

About

Author - Robert Crane BE MBA MCP

Robert has a degree in Electrical Engineering as well as Masters of Business Administration. He is also a Small Business Specialist and Microsoft Certified SharePoint Professional. Robert has over 15 years of IT experience in a variety of fields and positions, including working on Wall St in New York. He was the co-founder of Saturn Alliance an IT systems integration business in Sydney, Australia. He continues his involvement with information technology as the Principal of the Computer Information Agency. Apart from resolving client technical issues, Robert continues to present at seminars and write on a number for topics for the Computer Information Agency. Robert can be contacted via director@ciaops.com.

Company – Computer Information Agency (www.ciaops.com)

Founded in 1995, the Computer Information Agency is a specialized technology consultancy in Sydney, Australia that focuses on assisting businesses and individuals improve their productivity using technology and smart business practices. The Computer Information Agency has high levels of experience in technologies such as Windows Servers, including Small Business Server, and desktop applications such as Outlook, Word, Excel and OneNote.

With special emphasis placed on the business benefits of technology the Computer Information Agency is unique in its ability to work with companies to improve and streamline their processes utilizing the technology they already have in place. The focus is on providing an improved end result for the business which in the long run leads to greater productivity and profitability. More information about the Computer Information Agency can be found at http://www.ciaops.com.