

Getting Started with Microsoft OneNote 2013

Mike Gurner



OneNote

Mike Gurner – Rosoft Training Limited

Getting Started with Microsoft OneNote 2013

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1st edition

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ISBN 978-87-403-0799-3

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1 About Your Author



I'm Mike Gurner, otherwise known as Rosoft Mike. Say Rosoft Mike quickly ten times if you're not sure why and all should become clear.

I've been showing people how to get more from Microsoft Office applications since I first sat in front of a copy of Word for Windows 2.0 back in 1992 or thereabouts. I should have realised what I was letting myself in for when Microsoft set their stall out by choosing to name the successor to Word 2.0 the considerably less than logical Word 6.0. Anyway, Microsoft Office products have been a significant part of my life for a long, long time, and I'm generally rather fond of them.

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What started as a hobby for me became a job in 1999, then my own business (Rosoft Training was founded back in 2001) and then a way of life. I've been delivering Microsoft Office training courses, writing articles, newsletters and books on Microsoft Office, providing Microsoft Office consultancy services to business and generally doing my best to show the world that "Software Shouldn't Be Hard" from that day to this. I was one of the first Microsoft Office User Specialist Authorised Instructors in the UK and am an active member of the Microsoft Certified Trainer programme. I presented at the Microsoft Certified Trainer Summit in Bucharest in July 2014 and generally try to keep myself busy and active in the Microsoft Office world.

Microsoft make products that are capable of fantastic things. Truly. In case I sound like some sort of evangelist, let me add some balance to that statement. The products are capable of fantastic things, however most people never get near to their full potential. Microsoft are not very good at making their products easy to use, which is something for which I'm extremely grateful. Without that fatal flaw in the majority of their products, I wouldn't have the career that I have, and you wouldn't be reading this.

What excites me most about helping people get more productive with Microsoft Office is that the gulf between how most people use the tools and how they *could* be used is pretty wide. That gives space for some genuinely huge leaps in productivity and capability for most users. I hope you'll enjoy this book and would love to receive your feedback on what you find in here – please feel free to contact me at mike@rosoft.co.uk

2 About This Book

I hope you don't take this the wrong way, but this book has been written for normal people. If you're a fiendish technical wizard, then this might not be ideal for you, as I've promised my Doctor that I'm going to cut down on fiendish behaviour, as it's not good for my blood pressure. It's also true that if you're absolutely terrified of all things to do with technology, and break out in a cold sweat at the mere mention of computers (and yes – I do mean you Dad!) then this might not be ideal for you. I'd suggest a pencil and paper in that instance – I'm sure you'll be happier. If you're in either of those categories, I'm not saying that you shouldn't read this – I'm just pointing out that it's not really targeted at you, so it might be a little hard work.

No – I'm writing for people who are keen to understand how to use some of this new-fangled technology stuff to make their lives easier, and who are happy to be guided through some of the important steps that will make that happen. If that's you, then welcome on board – buckle up and enjoy the ride.

Far too many software books are written with a presumption that the reader already knows whatever the writer knows, and that's the key reason why most software books never hit the mark. I realise that I'm setting myself up to be shot down in flames here – it's always a difficult tightrope to walk between confusing people and boring them, but it's one that I always have fun with in the training room, and I'm going to do my best to translate that here.

I'm deliberately not going to tell you absolutely everything there is to know about OneNote – I'm not going to walk through every possible button you could ever press and every single setting. There's a lot in there that you won't need, and there's also a lot in there that you'll find for yourself along the way. What I'm keen to do is tell you what you need to know to get started.

If you find that there are sections of this book that are telling you things that you already know, then feel free to skip them. I promise I won't be hurt. Much. ☺ Having said that, it might be worth scanning through that section anyway, because I'd be surprised if there wasn't something in there that you'd find useful. The other side of that scenario is also important to discuss – if you find that there are sections of this book that you're just not 'getting' then don't worry about it. Each of the sections can happily stand on their own, so feel free to move on to the next section, and come back to it later. In my experience, you'll generally find something later on that will make the earlier confusion seem a little less confused and you'll be able to go back and view the section with clearer eyes.

On with the show.

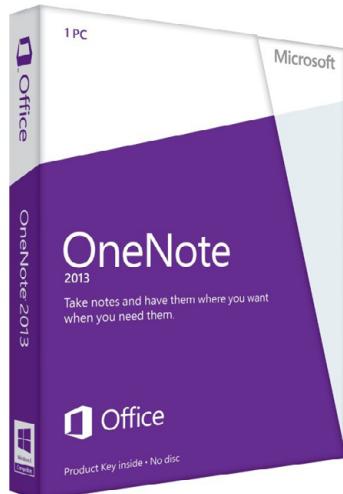
3 What is OneNote?



Microsoft OneNote is the unsung hero of the Microsoft Office family. It's been around since 2003 and it's been shipping with most versions of Microsoft Office since not long after that, yet it's quite rare for me to come across a committed OneNote user.

In my experience, the majority of people who have it don't know they've got it, and those that do know that they've got it aren't really sure why they've got it. That's a shame, because OneNote is a fantastic tool. It's a tool that, once you understand how to get the most from it, I think you'll very quickly make an integral part of your daily life, and one that you'll soon come to wonder how you managed without it.

Just to give you an indication that I practice what I preach, all of the preparatory work for this book (and nine others that I'm writing for Bookboon) was done in Microsoft OneNote, on a mix of devices. The majority of the book was written in the full OneNote 2013 PC version, however the OneNote Web-App was used online for some parts, the iPad version was used for others, the OneNote for Mac app was used in a couple of places and I even wrote a part of one chapter on my iPhone.



OneNote is a challenging tool to describe because it doesn't really have a real-world equivalent that it replaces. Word replaces the typewriter, Excel replaces your calculator, PowerPoint replaces the overhead transparency (youngsters ask your parents what they were), but I'm not certain what OneNote is replacing. In simple terms, it replaces a notebook, but the fundamental difference is that OneNote does so many things that a notebook never could.

So what does OneNote do then? OneNote is a note-taking application, but to be honest, that description doesn't do it justice. Note-taking implies that it's just a step up from a paper notebook, but in reality that's like saying that a computer is just a step up from an abacus. I'm not knocking paper notebooks (or abacuses for that matter) but they have many limitations and OneNote has very few.

OneNote is a tool that captures ideas, no matter what form they come in – you can type, you can write, you can bring in documents, you can bring in audio and you can bring in video. OneNote lets you collate everything you know, think or find out about a topic all in one place. You can structure it in a variety of different ways, restructure it in a heartbeat, add, edit, delete, combine and do pretty much anything you want with it. The intuitive way it all works makes it easier to learn about something, and as you structure your information together, you'll see it all much more clearly. You'll use it because it very quickly becomes a tool that you can use instinctively, without much thought. It will improve your productivity, your capability and your creativity, and that's quite a feat.

It's a great tool for individual use, but OneNote also allows you to work with whoever you choose on a notebook. You're in control of access, you can add or remove permission to view or edit your notebook to anyone you fancy, and you can always see who has access. Thanks to the OneNote web app they don't even need to have OneNote installed on their PC.

3.1 It's not just about the PC

Microsoft have rightly received a lot of criticism for their failure to provide versions of the core office suite applications for other platforms until very recently. That's a decision that I'm fairly certain they'll come to regret in years to come, but at least with OneNote they've finally got round to making a pretty good job at providing versions for all of the major platforms.

From a personal perspective, OneNote has been a part of my personal and working life for many years, but when I bought (and to be completely honest, fell head over heels in love with – sorry Bill) my iPhone and then my iPad (swoon!) things changed. At that time, OneNote wasn't available for either of those tools, and I found myself unable to use the tool I wanted to use on the gear that I'd bought. For a period I stopped using OneNote altogether, and switched to Evernote, which is a less powerful, but more widely available tool with a similar feature set.



Then Microsoft finally released a version of OneNote for iOS a couple of years ago. The first version was less than great, but subsequent improvements have made it a very useful part of my toolkit and Evernote for me is back to just being an application that I used to use. I'm not sure that someone with less invested in the Microsoft world than I would have switched back so readily. I think that Microsoft are banking an awful lot on people's loyalty to their core office applications. Only time will tell whether they've got it right or not – my guess right now is that Office will lose its dominant position within the next ten years based on the decisions Microsoft have made over the past three or four years – remind me of it in 2024 if I'm proved hopelessly wrong.

An advertisement for the CISO Conference. It features a large image of the Apollo Hotel at night. On the left, there is a red lightbulb icon and the text "CISO Conference" in white, with "Produced by Inspired" below it. On the right, there is a white box with the text "Apollo Hotel 1, Groenlandsekade Vinkeveen, Amsterdam, NL Dec 5th 2019". Below the main image, there is a call-to-action: "Listen, learn & build relationships with our Network of CISOs & Cyber Security Leaders". To the right of this text is the "Inspired" logo, which includes a blue lightbulb icon. A green oval at the bottom right contains the text "Click on the ad to read more" with a hand cursor icon pointing towards it.

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Inspired

The key thing I'd suggest here is that the idea that people make a choice between working on a Mac or a PC and stick to it has gone for good, outside of very evangelical Apple or Microsoft circles. During a recent Microsoft Certified Trainers conference in Bucharest, which is a pretty evangelical audience to say the least, I did a quick headcount of Apple products that were being visibly used. I admit it's not the most scientific of methods, but I'd say that somewhere in the region of 20% of that traditionally partisan audience was using products made by 'the enemy'. The tech world is changing my friends, and it's changing quickly. To put it bluntly, people expect to be able to use the application they want on the tool that they own. If the application they want to use isn't available or doesn't work very well on the tool that they own, then they're likely to find a different application rather than change their tool. Microsoft has gambled that this isn't the case.

3.2 Real World OneNote Use

Let me tell you a little more about how I use OneNote to give you an idea of how much of a part of my life it has become. A few years ago I was pretty firmly in the Microsoft camp, using a mix of Windows PCs, Laptops and phones. That's all changed now – I'm putting the core structure of this book together using OneNote 2013 that's installed in a Virtual PC on an Apple MacBook Pro. I make regular updates using the OneNote app installed on my Apple iPad and occasional updates using the OneNote app installed on my Apple iPhone. I also make occasional updates on other PCs using whatever Microsoft are calling the OneNote Web App these days (it changes regularly). I also use the OneNote for Mac app on a fairly regular basis too.



That's not just an aside – the ability to add to and edit your notebooks from pretty much any device is a core element of how the application works. The content will sit by default in a Microsoft OneDrive account (name subject to change on a whim – Microsoft change that on a fairly regular basis, as businesses keep getting cross with Microsoft for choosing names that they've already been using for some time) – you can store it locally on a PC, but you'll be missing out on massive potential if you do. If you don't have a Microsoft account, then you can sign up for one in minutes and it's totally free.

Let's just recap the basic idea here for a minute – OneNote is a note taking and information-collating tool that stores your information securely online and allows you to access, add to and edit your information from your smartphone, tablet, PC and the web. That's a pretty powerful concept and one that's worth spending a little time on. So here we go.

I should point out here that there are many differences between the different versions, and I'm not going to go into all of those here. I'm going to talk about the main PC version mostly and will dip into other platforms where it's important, but you'll have to bear in mind that you'll find differences in the real world. One of the key things about the smartphone, tablet and web versions of OneNote is that they can be and are updated on a regular basis, with new features being added and existing ones being improved regularly. It's the future ☺.

Geek Alert

I also work in a number of corporate businesses, and funnily enough I use OneNote there too, though in slightly different ways. The flexibility you'll have to work with OneNote in a corporate environment will depend to a great deal on the size of business, the industry that you work in and the approach to security and collaboration taken by your IT department. I've not come across many large corporate IT departments who are happy for staff to use Microsoft OneDrive (or whatever it's called this week) to share content either inside or outside of the business, which may limit your ability to work with some aspects of OneNote.

Traditionally within the business environment I create Notebooks in shared folders or network drives where the people I need to collaborate with have access, and where I need to collaborate with external clients or people from different parts of the business, it tends to be down to discussion with the IT department to agree the approach.

The main point I'd make here is that I use OneNote in whatever environment I'm working in, even though I may need to use it differently depending on the environment – a quick check through my the list of recently used notebooks from my personal OneDrive account reads like this:

- The MooCamp Radio Show – a personal project where I collaborate with a number of other people on the script for a weekly radio show
- BookBoon – a series of Notebooks where I'm using OneNote to gather my thoughts on a series of books (including this one) that I'm writing for BookBoon
- The Box Ticked – a Notebook I use to work collaboratively on songs for a band that I'm in
- Free by Fifty – a Notebook that I use to create my plans for world domination so that I can retire by the time I'm fifty (the clock is counting down rather quickly right now ;-)

In one of my corporate clients I've also recently used:

- Project ***** – a Notebook where I collate all the notes for a project whose name I'm not going to share here as it's confidential
- Team Planning – a Notebook where I map out how I'm going to build and work with my team there in the future
- Excel Tips – a Notebook where I share and discuss tips on Excel with a group of colleagues who are keen to improve

The advertisement features a man with curly hair, wearing a white striped shirt, sitting at a desk and holding his head in his hands in a gesture of stress or despair. In the background, a laptop sits open on the desk. The overall lighting is bright, suggesting a daytime office environment.

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4 What's New in OneNote 2013

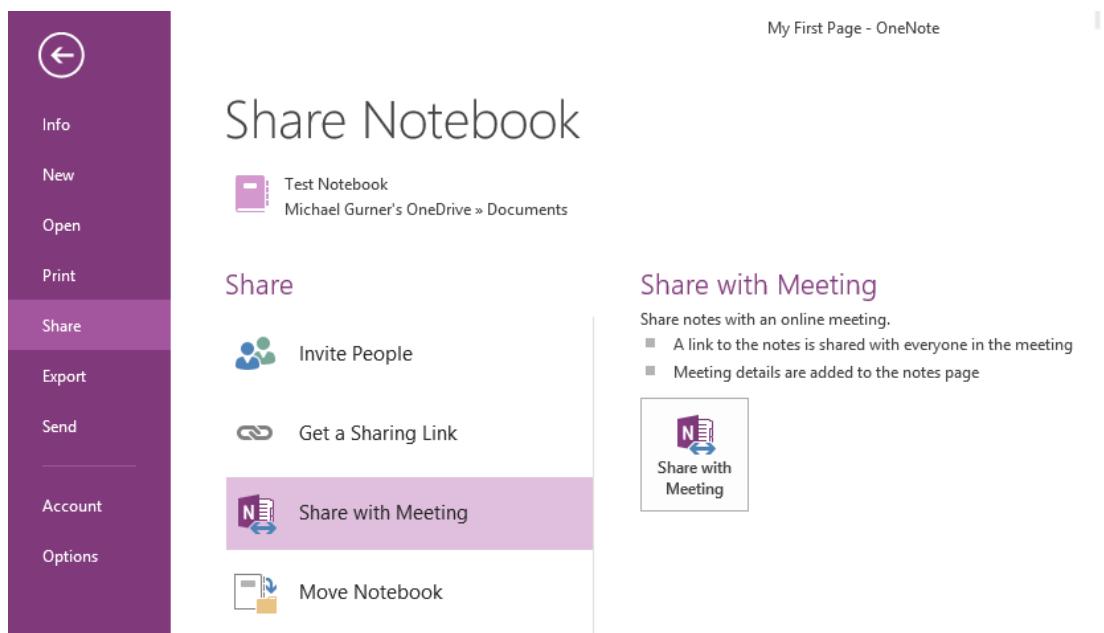
If you're already a OneNote user, it's worth spending a little time getting used to the new features and improvements in OneNote 2013. There are quite a few features that are brand new, and a number of areas where significant enhancements have been made. If you're brand new to OneNote, then you might find that some of this won't make much sense at first. If that's so, then feel free to skim over it and come back later on, but I'd have a read through first. You'll get a few good ideas of how you can use OneNote moving forward.

4.1 Brand new features

4.1.1 Meeting Notebooks

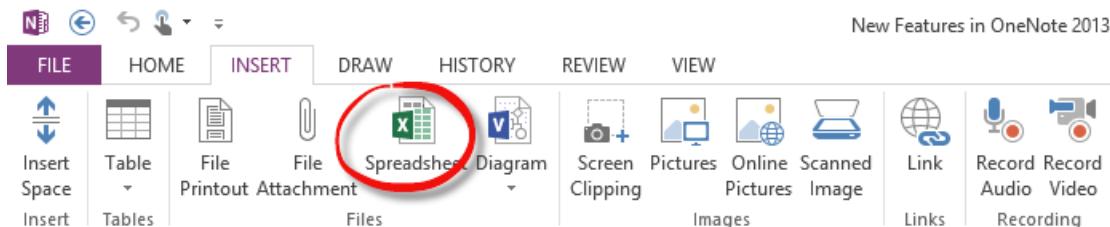
Meeting Notebooks do pretty much what they say on the tin. They are designed to allow you to take notes on a meeting and share them with other meeting attendees, either live or following the meeting. Due to OneNote's web-apps, meeting participants don't even need to have a copy of OneNote installed on their computer – just an internet connection.

To share a notebook with a meeting you have a couple of choices. You can either activate the sharing via Outlook or from within OneNote.



4.1.2 Embedding Excel spreadsheets

Traditionally, Excel spreadsheets could be copied into OneNote as tables, but they can now be fully embedded within a Note. It's a logical approach too – to Insert a Spreadsheet, go to the Insert ribbon (see what they did there?) and choose Spreadsheet from the Files section.



You can choose whether to add an existing file or a new one:



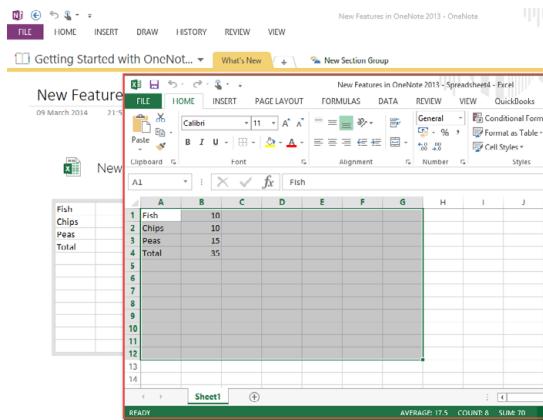
In this case, I've chosen a new one:

The screenshot shows a Microsoft OneNote page titled 'New Features in OneNote 2013 - Spreadsheet'. A table is displayed with the following data:

Fish	10
Chips	10
Peas	15
Total	35

An 'Edit' button is visible at the bottom of the table. The entire note is highlighted with a red box.

That might not seem to be much of a difference, but it's fairly significant. It means that with just a click on the Edit button, you can work on a spreadsheet directly within your notebook, and that means that all of Excel's tools are available to you.



It's not a feature that I've used in anger yet – I'll wait to see whether that's something that's because I'm not used to working that way, or whether there's no real value in working that way.

The advertisement features a woman with long blonde hair wearing a black VR headset, looking upwards with a surprised or excited expression. To the right of the image is a red vertical banner with white text. The banner includes the company logo, the text "BEDRE LØSNINGER", and a paragraph about their focus on innovation and transformation in the construction industry. At the bottom of the banner is a link to their website. A green call-to-action button at the bottom right encourages users to click for more information.

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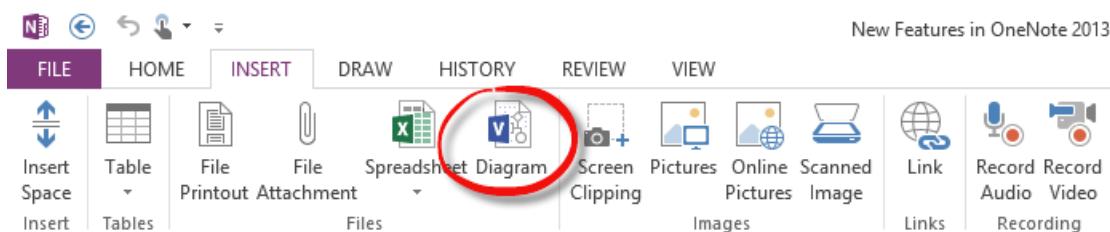
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4.1.3 Embedding Visio diagrams

It's the same with Visio – traditionally you could copy a Visio diagram into a notebook, but that would have been copied in as a picture. You'd have lost any Visio functionality once you'd copied it in so you couldn't edit the diagram in any way. Now you can embed Visio diagrams directly into OneNote notebooks, all of Visio's functionality is available to you from right within OneNote. The process is exactly the same as the Excel one above – you just choose the Diagram button instead of the Spreadsheet one ;-)



4.2 Enhancements to existing features

4.2.1 OneDrive integration and Multiple Platform Syncing

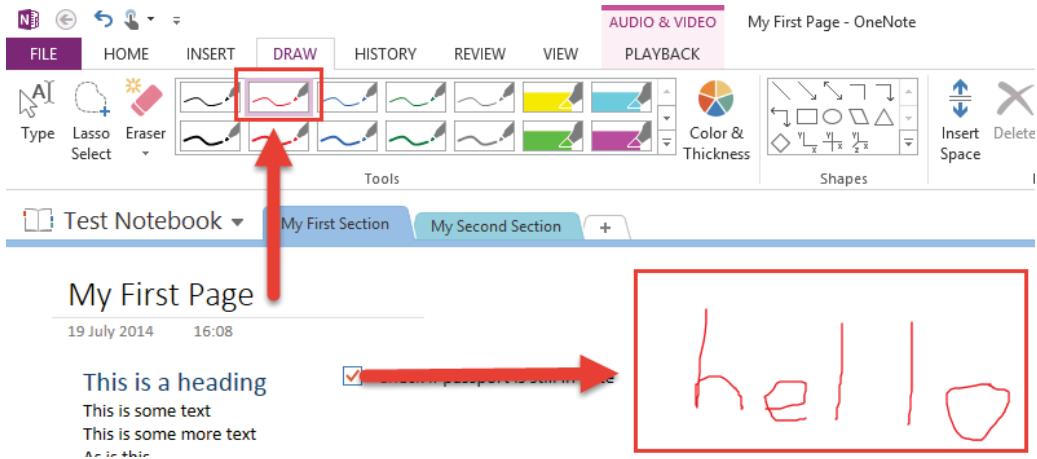
While Microsoft seem to be changing the name of their online storage tool on a weekly basis, it's still something that you'll get great benefit from. It's a pain if you're used to using a different online storage platform such as DropBox, but if you're used to storing everything locally, then it's a bit of a no-brainer. The basic idea is that you want to be able to work on your notebook from wherever you are and whatever machine you happen to be working on. To make that work for you, the file itself needs to be stored somewhere centrally. All of your devices will have a local copy too, so you can still work without an internet connection. The key idea behind it though is that if you have been working without an internet connection, as soon you reconnect, any changes that you've made will be uploaded to the OneDrive master copy. Then whenever you open it from any of your devices, it will pull down the most up to date version from OneDrive.

You don't need to do anything here. OneNote does everything for you in the background, and it just works. I've found some synchronisation problems if you have notebooks with hundreds of pages in your sections, but outside of that, it has been pretty seamless.

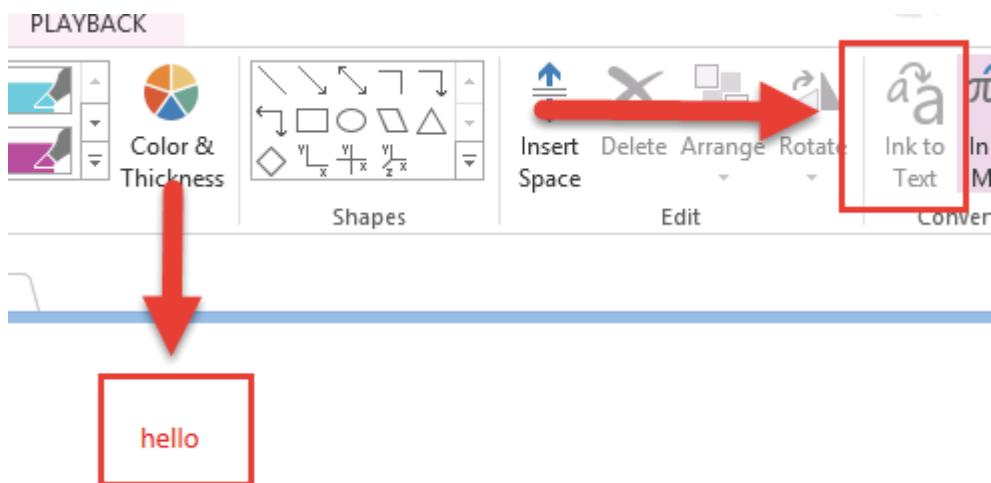
4.2.2 Improved handwriting recognition

I'm never been convinced by handwriting recognition, primarily because humans struggle to understand my handwriting, so I think computers are never going to get too far with it. Having said that, it's a cracking tool to use when it works well, and I've been surprisingly impressed with it so far. It's designed for tablet use of course, but even using the mouse I was able to scribble some text that OneNote could easily recognise.

I chose a pen from the Draw Ribbon and scribbled the word hello in my traditional childish scrawl:



A simple click of the 'Ink to Text' button and OneNote quickly converts the scribble into text



I'm not completely convinced of the long-term usability of handwriting recognition – to be honest I'm a bit of a wizard when it comes to typing using onscreen keyboards, so I'm not sure if I see the need personally. Having said that I'd experiment with it if I were you and see how you get on.

4.2.3 Improved drawing tools

The drawing tools within OneNote have been significantly enhanced in OneNote 2013 – there's a dedicated Ribbon with a far wider set of options than have previously been available:



I'm in two minds over the usefulness of these drawing tools. On the one hand, they're clearly quite capable and could make the creation of drawings quite simple. On the other hand, they're far more capable than I'm ever likely to need, and to be honest with you, I think they're making a bit too much of them. Having individual buttons for each coloured pen seems a bit over the top when traditionally, you'd have a single button to allow you to choose a colour. It's also possible that as I'm relatively rubbish when it comes to drawing, these options really aren't built for me, but that others are using them as we speak to create wonderful things. I've got a feeling that this flies in the face of what the application is for – if you want to sketch out a quick drawing then OneNote could be a great place to do that. If you're looking to create a work of art however, then you'll always find better tools to do that with. The jury's out from my perspective, but explore and see how you get on.

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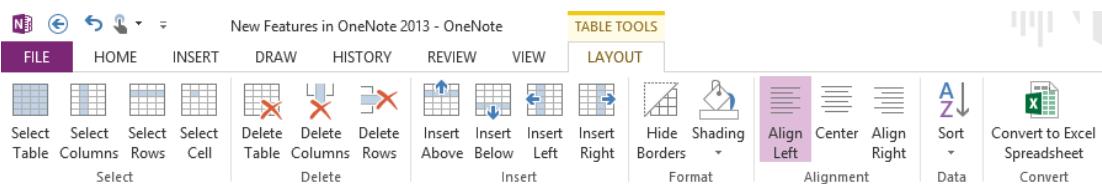
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4.2.4 Send to OneNote tool enhancements

The basic idea behind Send to OneNote is that whatever you're doing on your computer, if you find yourself thinking "I'd like to add this to a notebook" then OneNote is trying to make it easier for you to do so. We'll look at that in more detail later on, but there have been improvements in this version – if you want to experiment now, then hold down the Windows key and press N.

4.2.5 More sophisticated table features

Previous versions have been less than intuitive in their table tools, so it's great to see that there have been significant improvements here. In some areas, it's even easier than creating Tables in Word and other applications, but essentially, if you can work with tables in Word, then you can do pretty much the same stuff in OneNote. If you don't know how to work with tables in Word, then you'll find it's a simple and intuitive process and you'll pretty much know how to work with it before you know how to work with it. We'll look at tables in more detail later on.



4.2.6 Improved collaboration features

I've found the process of collaborating with others on a notebook to be something of a hit and miss affair. I do a weekly radio show (The MooCamp Radio Show on <http://www.secklowsounds.org>) and we produce the script for the show in OneNote. The basic principle works well, in that I can create a notebook, share it with other people and we can all edit as we go on. The problems I've found is that some features that I'd expect to see in this environment either aren't there or are patchy. The most important feature when collaborating on a notebook for me is the ability to see who has added or changed anything, and that's something where the implementation is patchy at best.

It's common to see changes but with no mention of who made them at all, or I've found that you'll often see a single initial to indicate that a page was added by 'M'. In some environments that might work ok, but bearing in mind that we have a Mike, a Mark and a Martin working on the show, it really doesn't work that well.

It doesn't take away from the fact that the basic idea of collaboration works ok, but it does make things less simple than they should be.

Anyway, from version to version, OneNote has improved over recent years, but the basic idea is still pretty much the same. It's a tool to help you gather ideas and information about anything you like, in pretty much whatever format you like and in as intuitive and un-intrusive fashion as possible. And it does it pretty well.

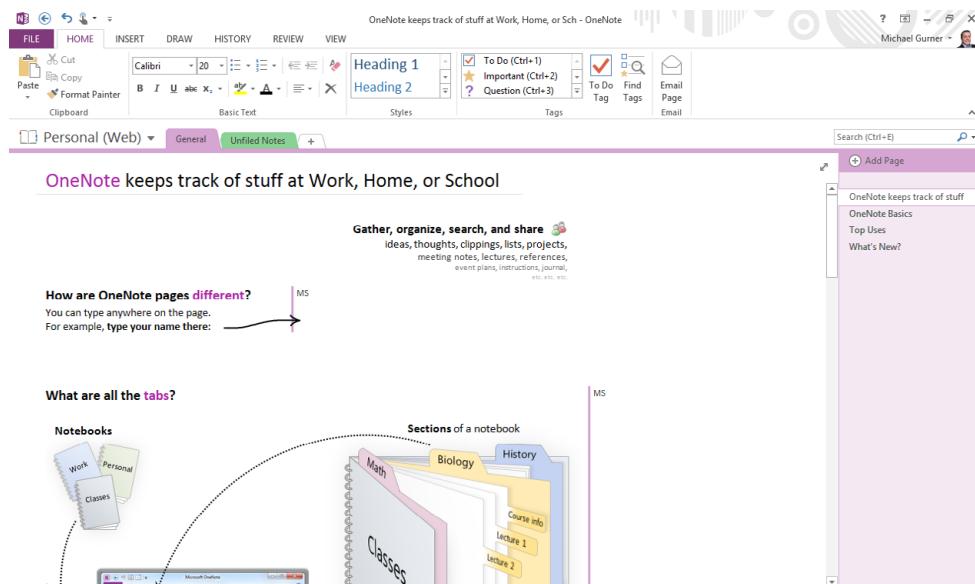
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5 The Default Notebook

One of the nice things that Microsoft have done with OneNote is that they've provided a default notebook with all versions. The default notebook provides a useful walkthrough of the basic concepts of OneNote, so I'd suggest that you make a note to have a look at it. If you're slow on the uptake here, you could always make a note in OneNote :-)

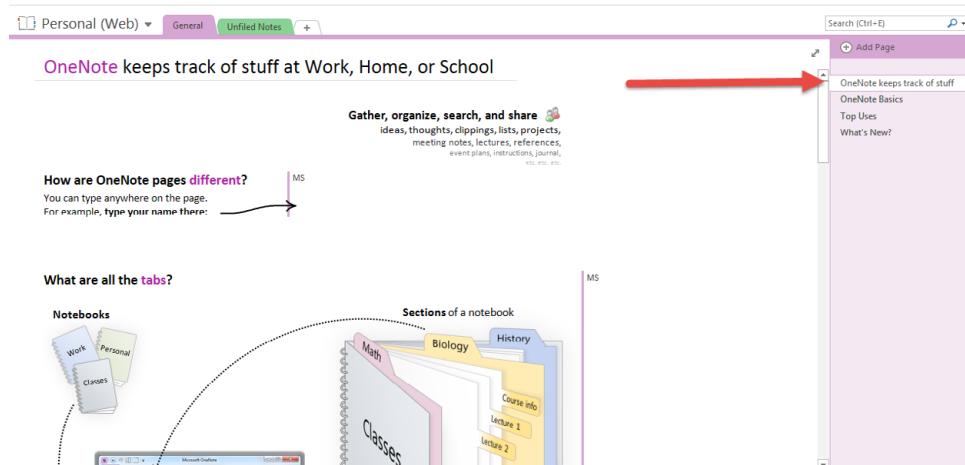
You may find that your default notebook looks a little different to mine, as how it is installed can apparently vary depending on the operating system and Office version that you're working with. Whatever the specifics, you'll see something pretty similar to what I've laid out below.

Have a look around the default notebook – if you've closed it down, it will be called Personal so open it up again (Go to File and choose Open).



You'll see a number of pages within the General section:

- OneNote keeps track of stuff at Work, Home, or School
 - A page that describes what OneNote is



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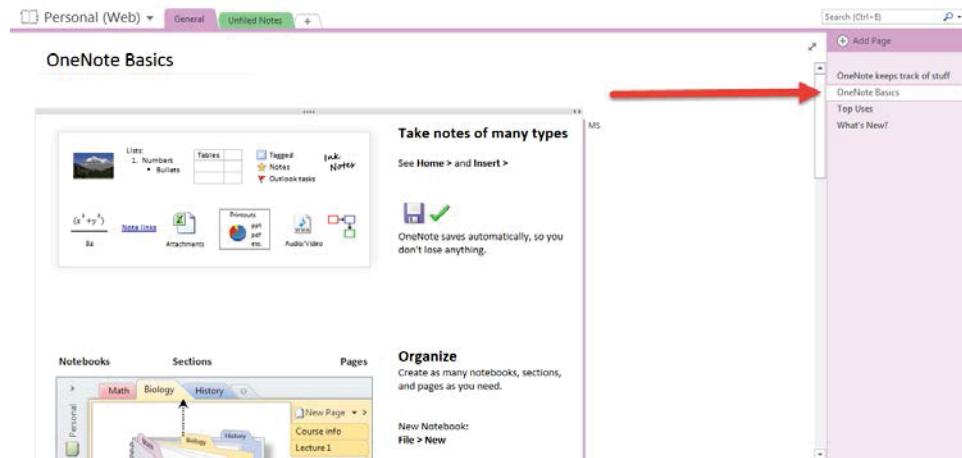
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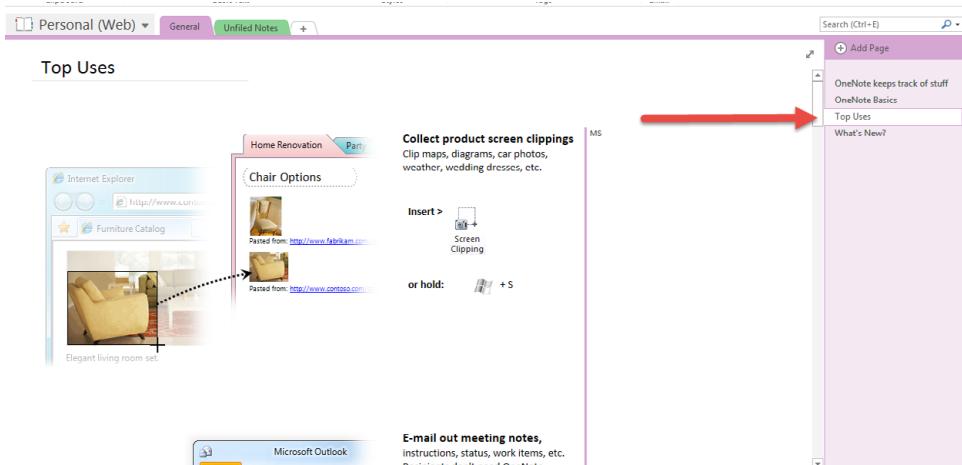
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- OneNote Basics
 - A page that gives a brief overview on a number of things that you can do with OneNote

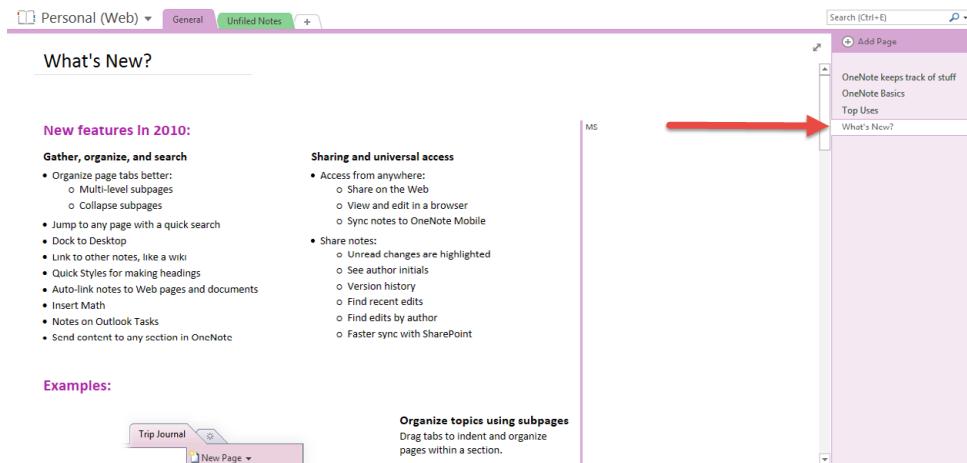


- Top Uses
 - A page that gives real-world examples of what you can use OneNote for



- What's New

- Funny enough, this is a page that tells you what's new in this version of OneNote, though in my installation it's telling me what's new in OneNote 2010, which is rather sweet.



Even if you're familiar with OneNote, you'll benefit from a walk through the default Notebook, as it may remind you of a number of features that you've forgotten about, and probably a fair few you didn't know existed. It's a good source of ideas and one that's worth revisiting every now and again to see what you can pick up from it.

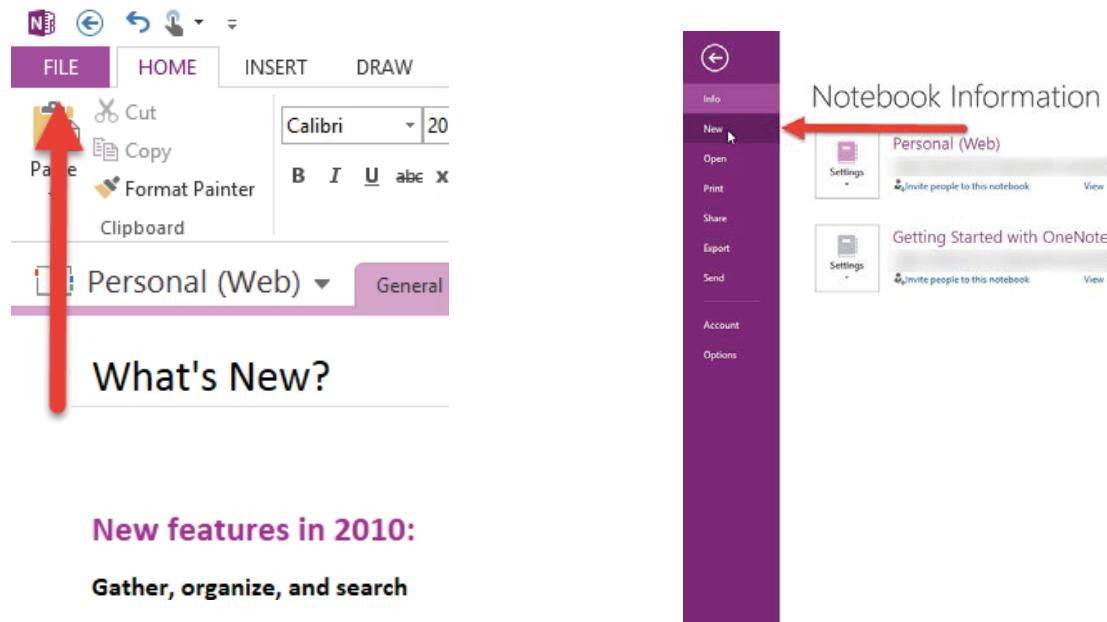
A composite image featuring a woman with long blonde hair wearing a black VR headset, looking upwards with a surprised or excited expression. To her right is a red advertisement for MT Højgaard. The ad features the company logo (a stylized 'M' and 'H') and the text 'MT Højgaard'. Below this, in large white letters, is 'BEDRE LØSNINGER'. Underneath, a block of Danish text reads: 'I MT Højgaard insisterer vi på, at der findes en bedre løsning. Vi udvikler og anvender metoder og teknologier, der sætter nye standarder for bygge- og anlægsbranchen. Vi har fokus på hele tiden at videreudvikle vores medarbejdere, så vi gennem nye teknologier og nye samarbejdsformer kan transformere bygge- og anlægsbranchen. Vil du med på holdet?' At the bottom of the ad, the website 'mth.dk/vorestilgang' is listed. The entire advertisement is set against a dark background.



Click on the ad to read more

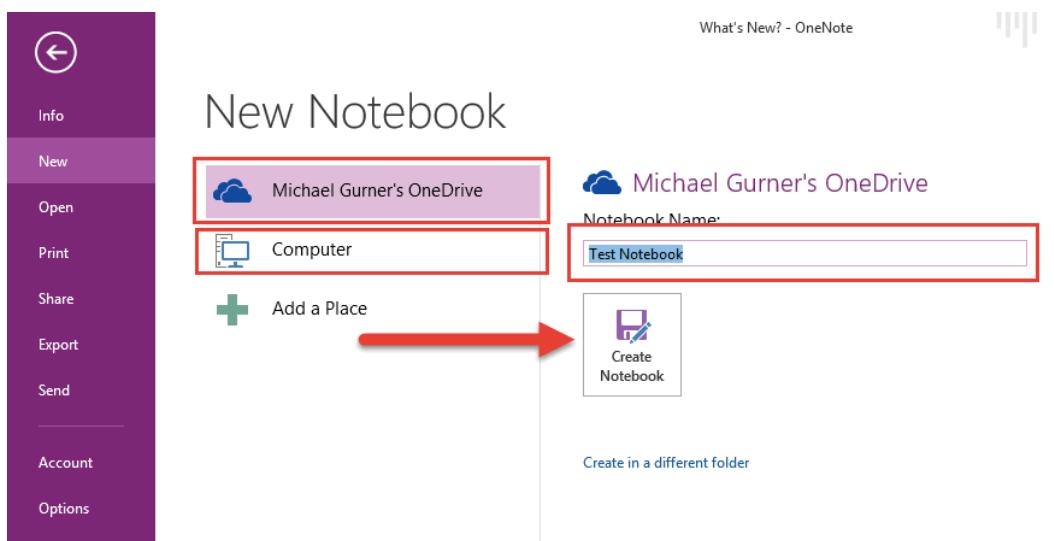
6 Creating a New Notebook

To start to understand OneNote properly, it's a good idea to dive in and just do stuff, so we'll create a new Notebook. To create a new notebook, click on File and choose New.



There are a couple of steps that you'll need to do, the first of which is to choose the location. The two standard options will be your Microsoft OneDrive account, which is the default setting and Computer, which will save the notebook on your computer. If you don't have a Microsoft OneDrive account, or you don't want to use it, then don't worry – you can do all the standalone OneNote tasks without it – you just won't be able to share your Notebooks with the wider world without a fair bit of messing around.

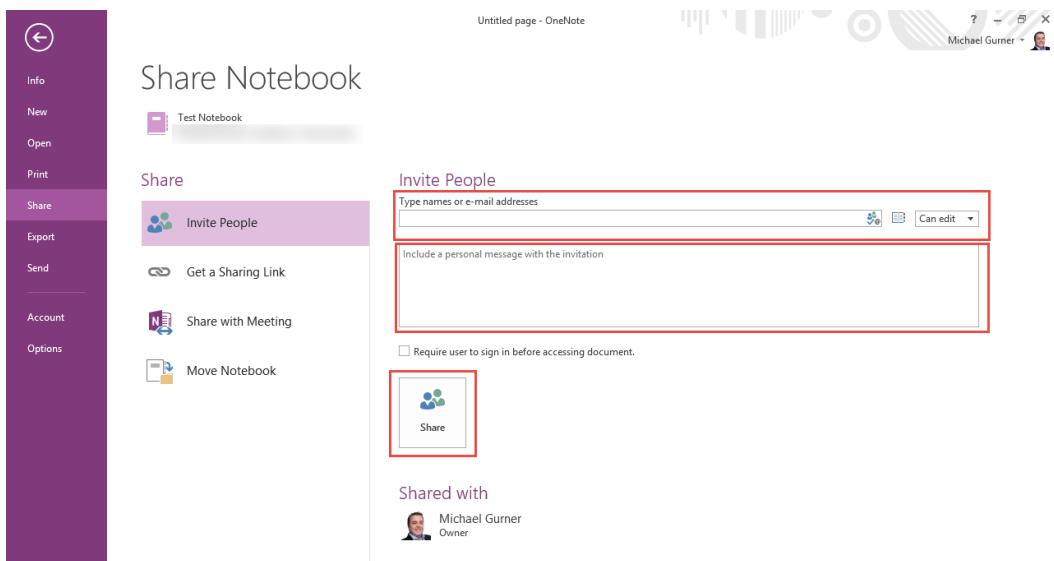
Whichever you choose, all you have to do is give the notebook a name, then click on Create Notebook.

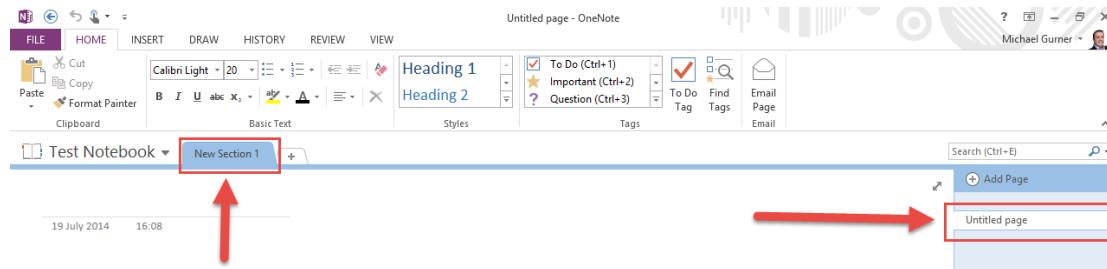


At this stage, you'll be asked whether you wish to share the notebook with other people.



If you choose to share the notebook at this stage, you'll be asked to type in the names (if they're already in your Contacts) or email addresses of people you wish to share the notebook with. You can choose whether each individual you share with can edit or just view the notebook contents and you can add a personal message.





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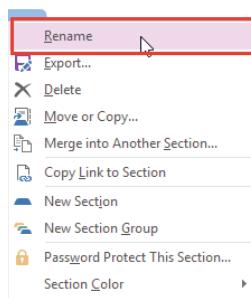


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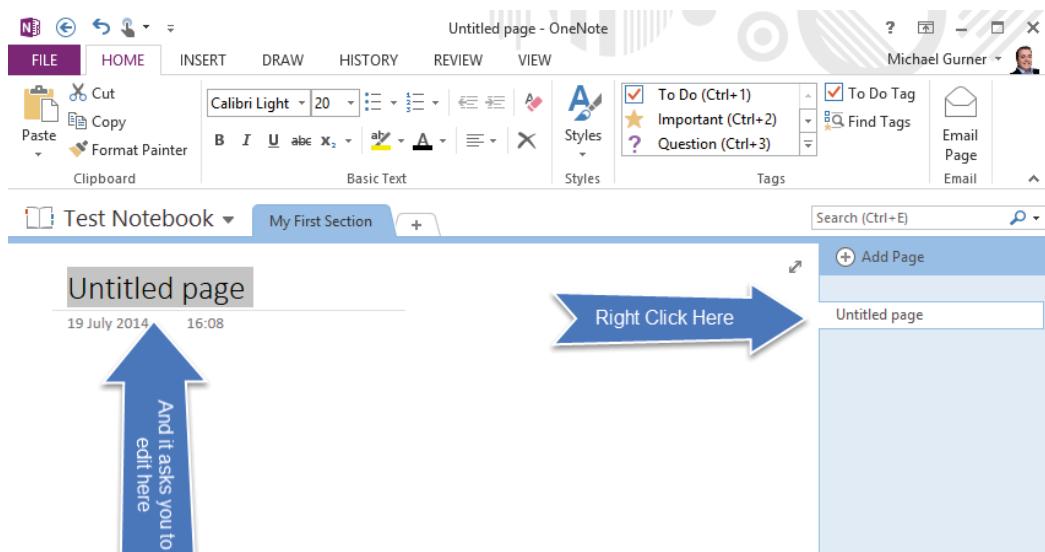
6.1 OneNote's Hierarchy

It's worth taking a minute to discuss the OneNote hierarchy. The top level of the OneNote hierarchy is a Notebook. Notebooks can contain a number of Sections. Each Section can contain a number of Pages. Each Page can contain a number of sub-pages. Sections can also be collected together into another level called a Section Group. In the desktop version of OneNote, Sections are listed across the top of the page and pages and sub-pages are listed down the right hand side of the page.

To change the name of an existing Section, you can either Double-Click the Section name and overtype or Right Click the Section name and choose Rename.



To change the name of an existing Page, the process is slightly less intuitive. You can still Right Click the Page name and choose Rename, but double-clicking doesn't do anything. Instead, the other method (and probably the easiest method) of changing the name of a page is to click at the top of the page and just type. In fact when you right-click the page name in the page list, it's actually the text at the top of the page that OneNote asks you to edit rather than the page name in the page list.



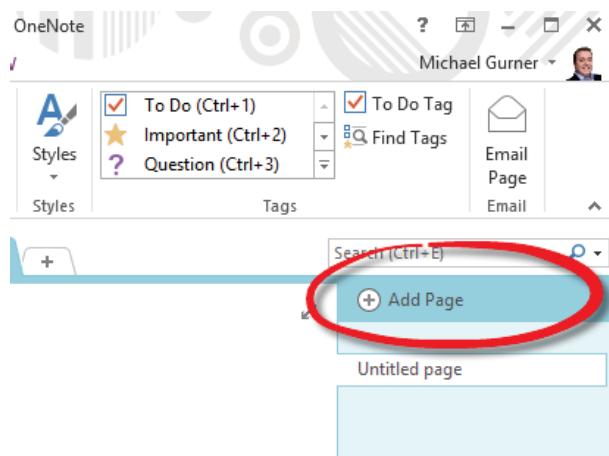
Adding new items is easy too. To add a new Section, just click the + by the side of the last Section Name.



Type in the Section name and a new blank section is created.



To add a new Page click the Add Page button at the top of the Page List.



You can also right-click the empty space below the last page in the page list, or hold down Ctrl and press N.

The most important thing about any of the processes above is that you shouldn't really have to think about doing any of them. They're quick, they're relatively intuitive and once you've done them a few times, they really do become second nature. That fits with the overall ethos of the application, which is that you don't have to think much about it, you should just use it.

7 Structuring your Notebook

You can create as many notebooks as you like, each notebook can contain as many sections as you like and each section can contain as many pages and sub-pages as you like. When you add to that the fact that it's simple to move sub-pages, pages and sections around inside or between notebooks, you end up with a powerful tool.

Perhaps the most important element of this is that it means that you don't have to worry too much about where you're adding something. It's so easy to move it afterwards that it doesn't matter where you put it 'in the moment', so try not to get too hung up about where to put things 'in the moment'. Just create them, get your thoughts down and you can always restructure later.

It's worth pointing out that it's less simple to restructure a notebook when using the iPad app and other similar versions – there are some things that you'll need to log into the web-app or desktop version to do, and restructuring is one of those.

The advertisement features a photograph of the Apollo Hotel building at night. A large red lightbulb icon is on the left, with the text "CISO Conference" and "Produced by Inspired". On the right, a white box contains the address "Apollo Hotel 1, Groenlandsekade Vinkeveen, Amsterdam, NL" and the date "Dec 5th 2019". Below the photo, text reads "Listen, learn & build relationships with our Network of CISOs & Cyber Security Leaders". The Inspired logo is at the bottom right.

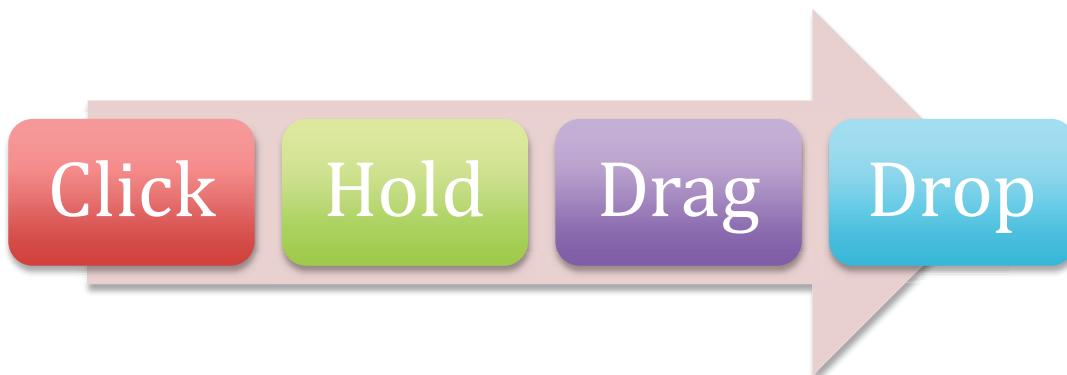
Geek Alert

I'm going to throw in an important caveat here, which is that I've found that OneNote sometimes struggles with notebooks that contain large numbers of pages and sub-pages. Using OneNote for my radio show, I've hit upon some significant syncing problems once I've gone past a few hundred pages in a single section, so have had to modify how I work with it a little. I can't give you any hard and fast rules about maximum sizes or anything useful like that, I'm merely suggesting a degree of caution if you start working with large numbers of pages. Each radio show has about 30 pages, and once the show has aired, I move each episode into an Archive section, and after about fifteen episodes I started to hit troubles, and syncing started to take very long periods of time. Luckily, OneNote makes it very simple to restructure and reorder your notebooks, so it's not a serious problem, however I would suggest that once you hit a problem like this, then I'd restructure your notebook sooner rather than later.

The basic principle of restructuring is just to click and drag. Click what you want to move and drag it to wherever you want it to go – in most cases that's all you have to do.

What that means is that you can easily change the order of the pages in any section by just clicking and dragging in the page list – click the page you want to move, hold down the mouse button, drag it to where you want to move it, then let go and it will have moved.

That's the mantra to remember – Click – Hold – Drag – Drop.

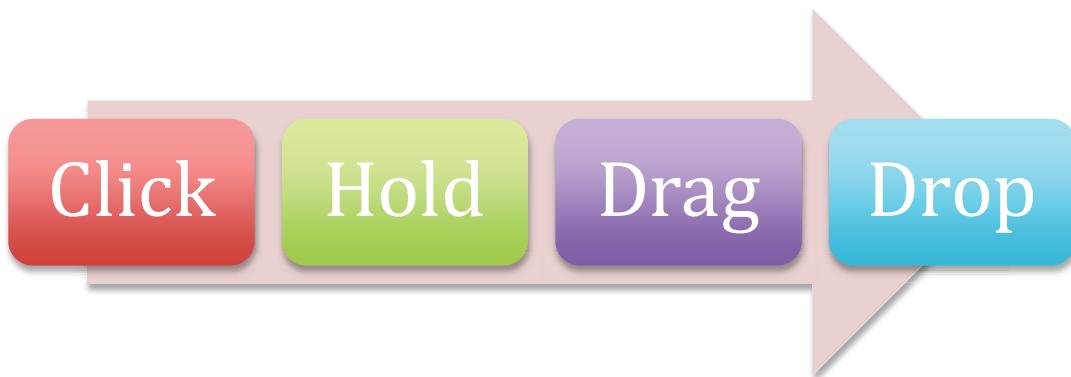


You can also easily move a page from one section to another. If you drag a page up to the section headers at the top of the screen and let go, then the page will move to the bottom of the page list in the section that you dropped it on. If you hold on to the page for a while longer, you can drag it to the right place within the folder list in the new section. That makes it really easy to restructure whole notebooks within a matter of seconds.

You can restructure the sections within any Notebook in the same way – just click and drag the Section Headers at the top of the screen and move them to wherever you want them to go. Once you've let go of the mouse, then it's done.

You can also move sections into other Notebooks – if you drag the section over the list of notebooks on the left hand side of the screen, when you let go of the mouse, the section will be moved to the Notebook of your choice.

Again, the same principle applies here – you shouldn't have to think about how to do what you want to do – it should be intuitive and natural, and in terms of restructuring, I'd suggest that it is just that.



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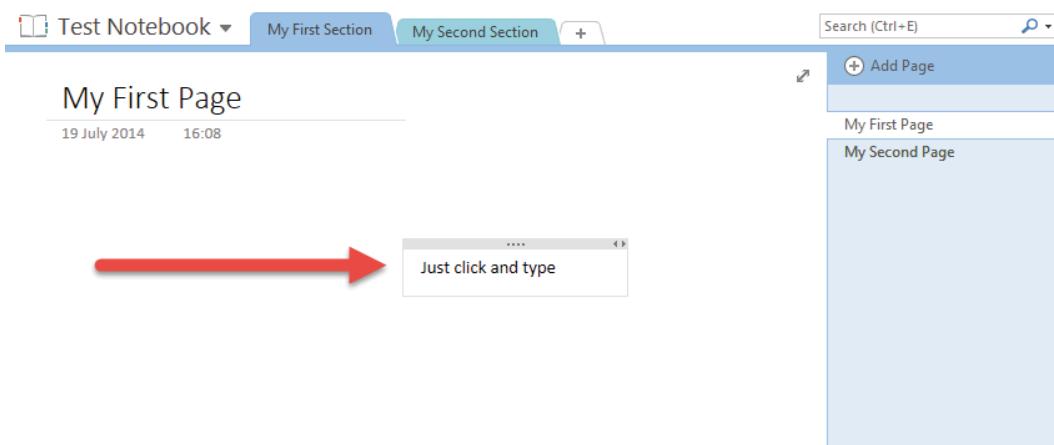
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8 Adding Content

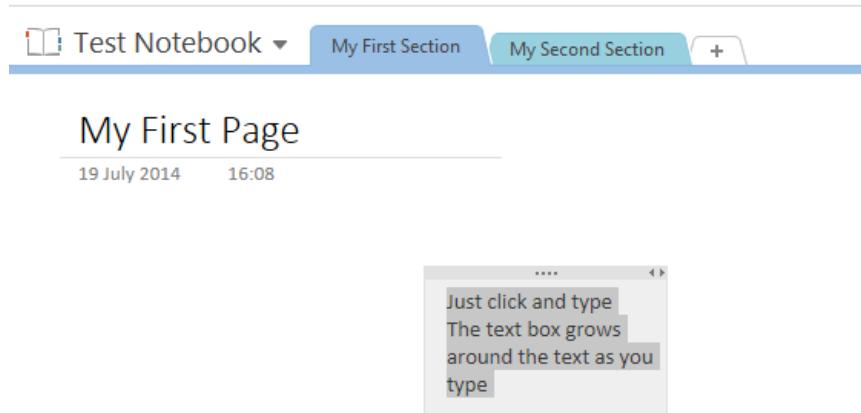
8.1 Adding content directly

OneNote's attempt to mimic a real-world notebook extends to where you can add content. When you create a new page, the cursor will by default be sitting and flashing at the top of the document. To add text in that position, you can just start typing. If you want to type somewhere else, then just click there and start to type.

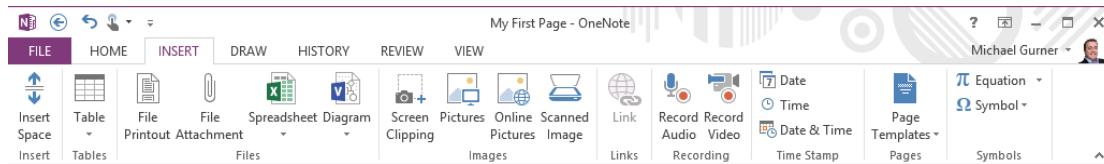


OneNote creates a new text box and allows you to just type away. The key principle is consistent throughout the application – you shouldn't have to think about it, you should just be able to do it.

Any text you add will be inside a text box, and that text box can be resized, moved or deleted just with a few clicks. You will find that the tools available for this will differ from platform to platform, but the desktop version will have the greatest functionality.



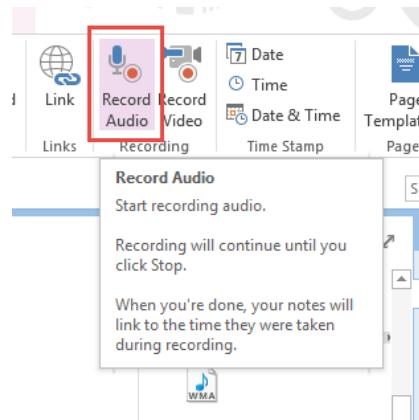
You can also use the traditional MS Office tools that you'll find on the ribbon to insert Pictures, Tables and just about anything else.



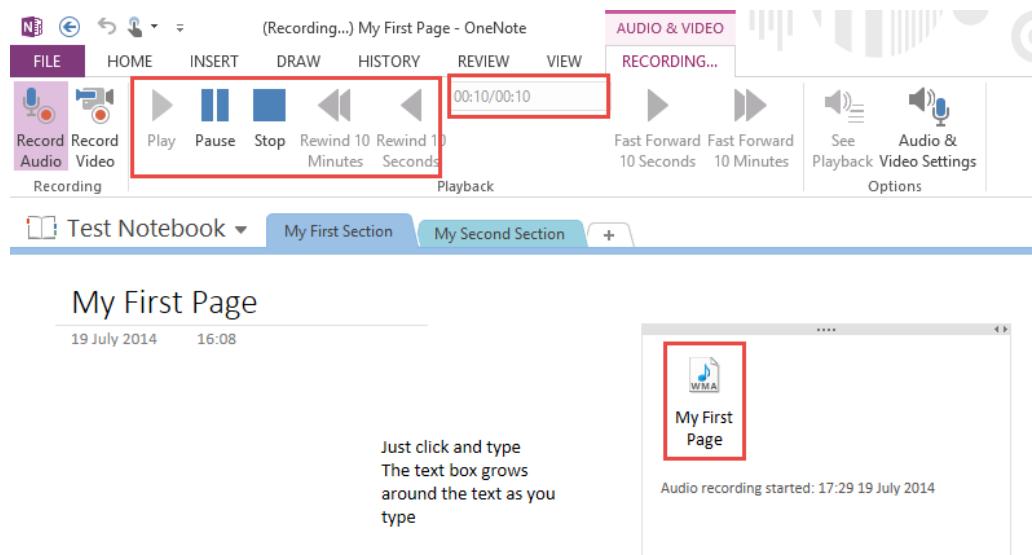
The process is consistent – you go to the Insert Tab (because you're going to Insert something – the clue's in the question) and choose the appropriate button.

You're not restricted to text in OneNote. Maybe you're not the best typist on the planet, maybe you want to capture what was said in a meeting, or maybe you just like the sound of your own voice – either way, adding an audio note to OneNote can help. It will operate just like a tape recorder – you click record to start recording and you click stop to stop recording – tricky stuff eh? It's quite liberating to end up working in an environment where it doesn't try to force you to do things its way – it really is up to you to just go ahead and do rather than having to think about how you're 'supposed' to do it.

To add Audio, click the Record Audio button:

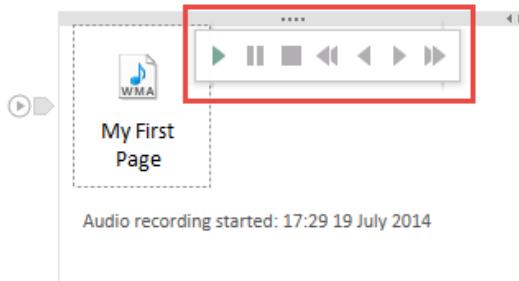


OneNote automatically starts recording, pops up a new Ribbon with all the options you need and adds the Audio file to your page.



A woman with long blonde hair, wearing a blue tank top, is shown wearing a black VR headset, looking upwards with a surprised or excited expression. To her right is a red advertisement for MT Højgaard. The ad features the company logo (a stylized 'M' and 'H') and the text 'MT Højgaard'. Below this, in large white letters, is 'BEDRE LØSNINGER'. Underneath, a block of Danish text reads: 'I MT Højgaard insisterer vi på, at der findes en bedre løsning. Vi udvikler og anvender metoder og teknologier, der sætter nye standarder for bygge- og anlægsbranchen. Vi har fokus på hele tiden at videreudvikle vores medarbejdere, så vi gennem nye teknologier og nye samarbejdsformer kan transformere bygge- og anlægsbranchen. Vil du med på holdet?' At the bottom of the ad, the website 'mth.dk/vorestilgang' is listed. The background of the ad is orange.

Whenever you want to stop recording Audio, just click the Stop button. You can then play the audio back either by using the commands on the Audio and Video Ribbon, or if you click the audio file itself, you'll see a set of mini-controls appear:

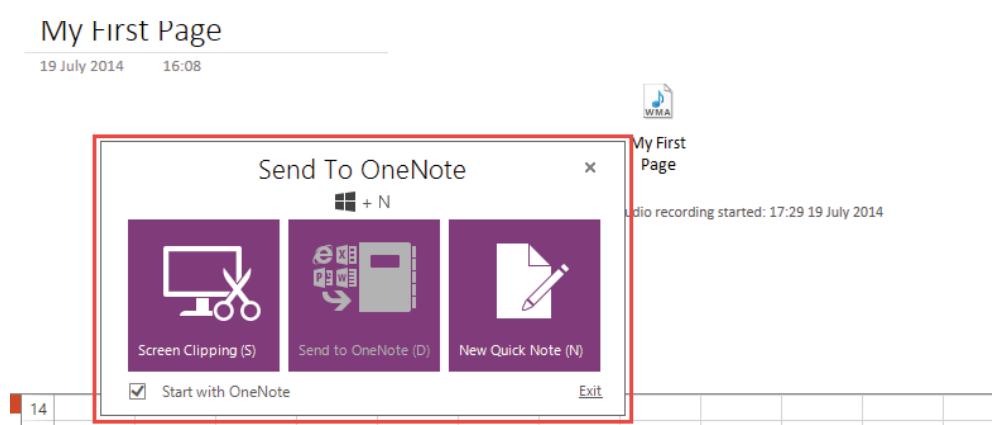


8.2 Bringing stuff in from other places

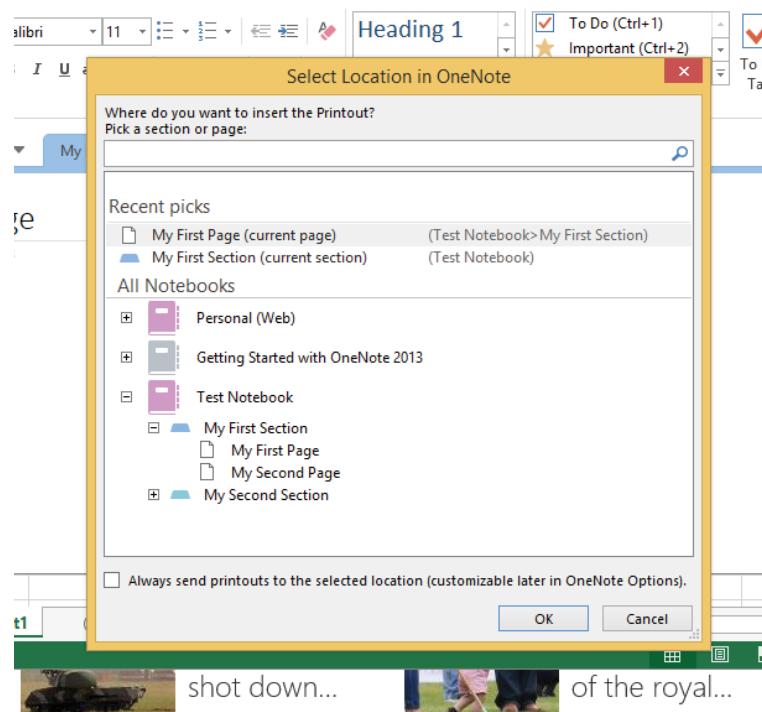
This is a different concept, and it's worth discussing this for a minute. OneNote isn't a word processor – it's a note taker. That means that when you realise that you need to add something to a notebook, it's quite likely that you don't have OneNote in front of you. That's where OneNote's Send to OneNote tool comes in – wherever you are, whatever you're doing on your PC, you can simply and quickly take whatever you're looking at and Send it to OneNote.

That means that you can be looking at an article on a webpage, and something about that article triggers off a thought along the lines of “ooh – that's really interesting, and links to that thing I was thinking about the other day”. Send to OneNote allows you to take a snippet of what you're looking at and send it simply and quickly to OneNote.

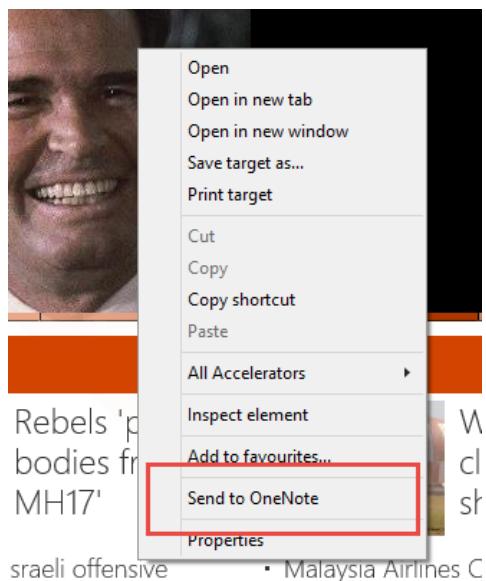
To activate Send to OneNote hold down the Windows key and press N.



From here you can take a clipping of your screen or the current document and send it to OneNote – OneNote will ask you where you want to send it to:



You'll also find a number of other applications will have Send to OneNote on their Right Click Menus – Internet Explorer for example:



Send to OneNote requires something of a change in how you work – it's not something that is likely to come naturally at first. It's worth experimenting with and you'll find that over time it gradually becomes a natural part of how you work, and OneNote integrates more closely into your everyday life.

9 Formatting

9.1 Using The Ribbon

If you're the type of person who is likely to flick over sections like this, just hold on for a moment or two before you do. If you find the Ribbon interface the most beautiful thing in the world, and you've never struggled to get what you want from it, then feel free to move to the next section. If however you've struggled to get used to the ribbon, or if you're still feeling a degree of resentment towards Microsoft for changing something that you were both happy and efficient with, then read on – it might just change your life ;-).

The Ribbon concept works pretty seamlessly across all of the recent Microsoft Office applications, though it's worth exploring a little in its own right. Microsoft introduced the ribbon in Office 2007, and it generated a lot of bad feeling from existing users. Essentially everyone had to re-learn how to work with each of the applications, and the time and effort required to do that seemed to grow in conjunction with how good you were on previous versions. The better you were before, the longer it took you to adapt to the newer approach.



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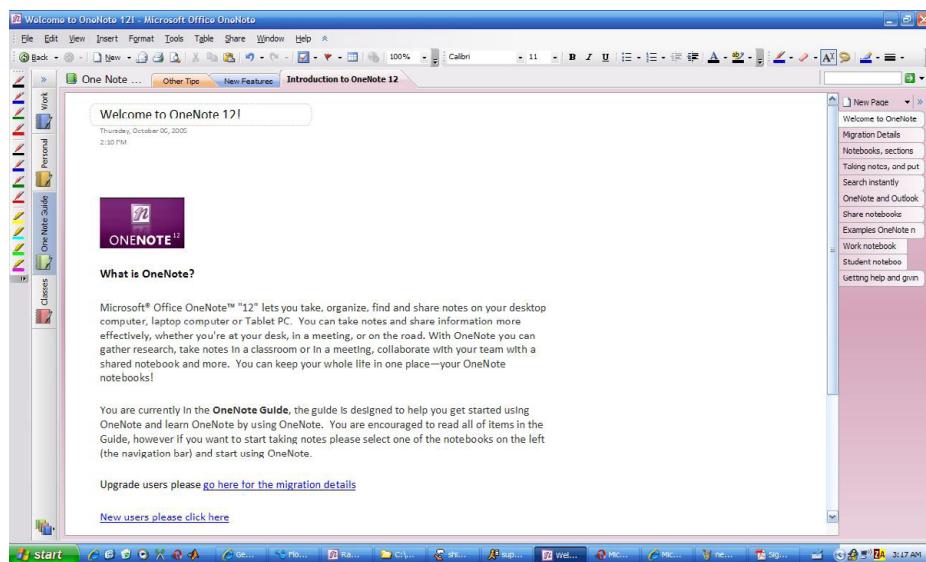
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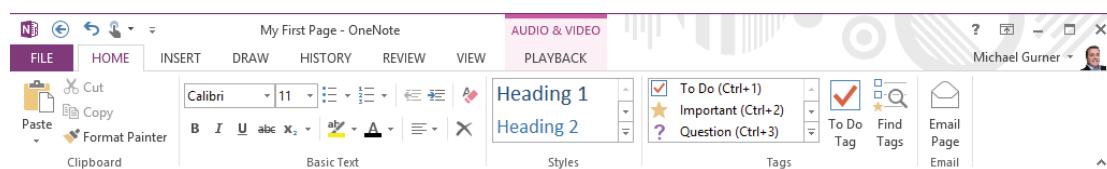


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The previous world worked with Menus and Toolbars:



The new world worked with a Ribbon:



They don't actually look all that different, but functionally there are some significant things going on. The menu and toolbar world had grown organically with each version of the applications. As new features and functions were introduced, so the toolbars and menus got more and more complicated, and it became less and less intuitive in everyday use. To give you an idea of how tricky that was, in Microsoft Word 2003, if you wanted to Insert something into your document, then there was no logical pattern that dictated where you would find that option:

- The option to Insert a Header and Footer was under the View menu
- The option to Insert a Table was under the Table menu
- The option to Insert a Picture was under the Insert menu

Essentially, you only knew where things were if you'd hunted around for them before and found them. There was no logical thought process that would lead you to something – it was just where it was because it was where it was.

So enter the Ribbon.

What Microsoft didn't do back in 2007, and haven't done to this day with any level of success, was to explain what they were doing, and why they were doing it. That was a shame, because the Ribbon is a massive improvement on the Menus and Toolbars method of working, but without the explanation, that never really hit home.

Microsoft's aim was this:

- To structure the applications in a way that meant you didn't have to know how to use them to be able to use them.
- To structure the applications in a way that meant that you could find things without knowing where they were

Their approach to this was:

- Show the things you need to use, when you need to use them
- Hide the things you don't need to use until you need to use them
- Structure things in a logical fashion

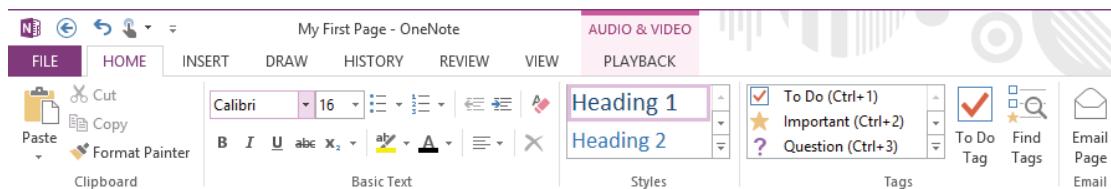
And that's where the Ribbon comes in. It's structured logically – if you want to insert something, then you go to the Insert Ribbon. If you want to control how your screen appears, you'll go to the View Ribbon and so on.

When you're doing any of those things, you'll only see the options that are to do with those things, so you can see the things that you need, without everything else getting in the way. That's even more defined when dealing with specific types of information. All of the Table Commands have their own Ribbons, as do the Picture Commands and other similar things. They don't appear at all until you click on the Table, the Picture or whatever it is that you want to work on.

9.2 General Formatting Stuff

The formatting options in OneNote are fairly similar to most Office applications, so you'll certainly be familiar with some of them. I'll give you a brief walkthrough some of the more common aspects next, but I'm going to suggest that it's a good idea not to get too hung up on them. Remember that OneNote is about capturing ideas quickly, not making things necessarily look marvellous, and there are some key shortcuts that can probably save you some time – we'll look at those at the end of this chapter.

The majority of the formatting options you'll use are on the Home Ribbon:

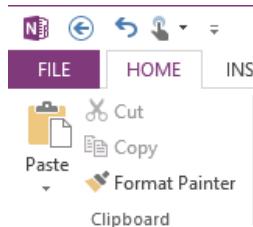


It's broken down into five key sections – Clipboard, Basic Text, Styles, Tags and Email – we'll take a brief look at each of those.

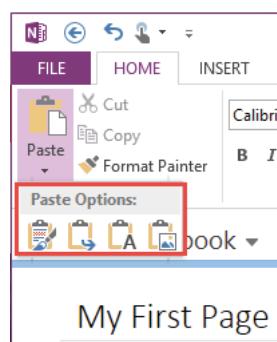
A photograph of the Apollo Hotel building at night. A large red lightbulb logo with the text 'CISO Conference' and 'Produced by Inspired' is displayed on the side of the building. To the right, a white callout box contains the text: 'Apollo Hotel 1, Groenlandsekade Vinkeveen, Amsterdam, NL Dec 5th 2019'. Below the main image, a white box contains the text: 'Listen, learn & build relationships with our Network of CISOs & Cyber Security Leaders'. In the bottom right corner, there is an 'Inspired' logo with a lightbulb icon.

9.2.1 Clipboard

The Clipboard section contains the Cut, Copy and Paste tools that you'll use to get information in and out of OneNote. It also contains the Format Painter, which if you're not familiar with it, is one of the most useful tools you'll find across the whole Microsoft Office suite.



It's worth highlighting the drop down button underneath the Paste button – it will provide you a variety of options to choose from, which will depend on the type of information that you've copied to the clipboard. In this screenshot, you'll see the options that are available if you've copied some text to your clipboard:



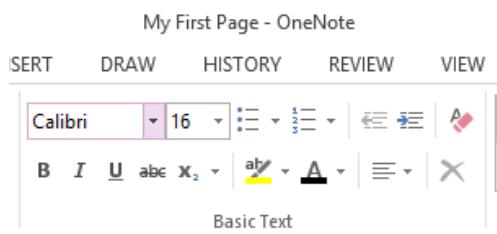
These allow you to Paste while Keeping the Source Formatting, Paste while Merging Formatting, Paste just Plain Text and Paste the text as a Picture.

The Format Painter shouldn't be sitting in the Clipboard section. Technically it's correct, because what the format painter does is to copy formatting to the clipboard and then allows you to paint it over other texts or objects. All of that is invisible to the user though – as far as the user is concerned, the format painter paints formats – the clipboard itself means nothing to most users. It's perhaps a minor point, but it's indicative of Microsoft's lack of understanding sometimes of how it's users think. They look at the technical elements of how the tool works, instead of looking at how it's users will think, and that's why whenever I train ANY Microsoft Application, the majority of people will never have heard of the Format Painter.

I won't labour the point further – if you already use the Format Painter, then you'll understand. If you haven't used it before, the format painter allows you to dip your paintbrush into something that's formatted how you want it to be, and to then copy that formatting to somewhere else. Test it out – select some text that looks nice and click the format painter button. Then click and drag over some other text, and the format painter will copy the formatting you liked over the new text. That's it. The key principle underneath it is that you shouldn't have to keep repeating yourself to recreate formatting – if you've done it once, then you can use the Format Painter to paint it somewhere else.

9.2.2 Basic Text

Most of the formatting tools you'll use on a daily basis will sit in the Basic Text section:



Most of these you'll find in pretty much every Microsoft Office application – you can choose the font, the font size, make the text bold, italic, underline, strikethrough or super/subscript. You can add bullet points, numbered lists, indent and outdent, highlight, change the colour of the font and control the alignment of the paragraph.

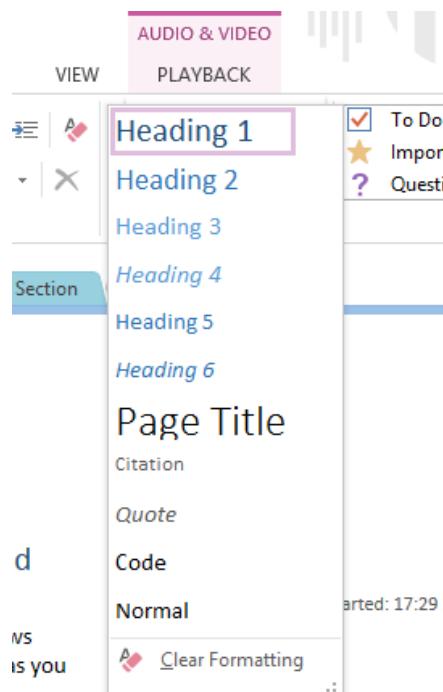


The two buttons at the right hand side are less common, but are both quite useful – these are the Clear Formatting buttons and the Delete button. Clear Formatting allows you to strip off all the formatting you've added to something, while delete allows you to delete something – funny that ☺.



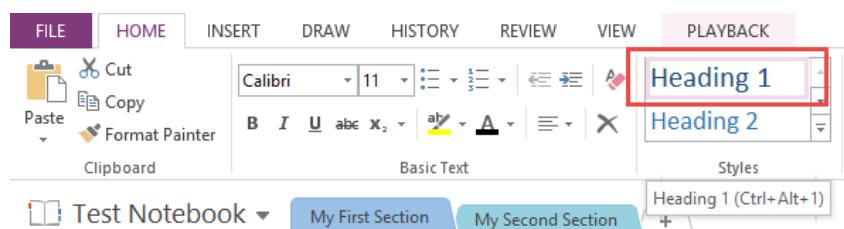
9.2.3 Styles

The next section is hugely important – Styles. If you’re already familiar with Styles from OneNote or Microsoft Word, then you’ll understand how much time they can save if you start to build your documents with them. OneNote doesn’t have all the Styles functionality that you’ll find in Word, but it has enough to save you spending much time mucking around with the formatting tools we’ve just talked about in the Basic Text section.



A brief overview first – a style is a collection of formatting commands – nothing more complicated than that. The basic idea is that if the chapter headings in your document are all Times New Roman, Bold, 16pt, Centrally Aligned, Dark Blue, and that they have 12pts of space after each one, then life would be a whole lot easier for you if you could say “apply all that formatting in one go please”. That’s what Styles do.

From a OneNote perspective, the key thing I'd suggest you think about in terms of Styles is that Styles can be used to very easily and quickly differentiate between different bits of your text. If you've got a heading followed by some text, you could spend time choosing the right kind of formatting you want and then applying each part of it to your text – that would work. Or you could just click the Heading 1 button in the Styles list.



My First Page

19 July 2014 16:08

This is a heading
This is some text
This is some more text
As is this

Just click and
type

The text box grows
around the text as you
type



My First
Page

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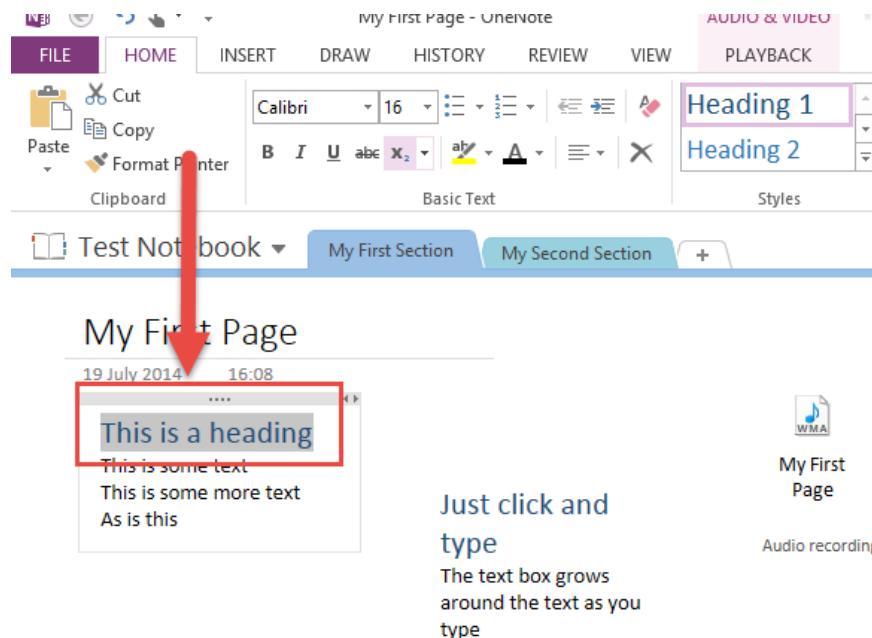
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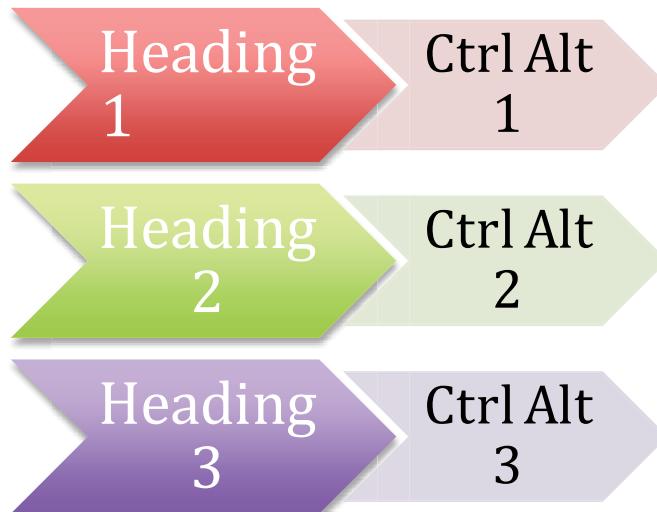
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To apply the Heading 1 style to the highlighted text, just click Heading 1 from the Styles list:



That can and will save you huge amounts of time. We can make it even easier by using a few keyboard shortcuts:



9.2.4 Tags

The Tags section looks quite innocuous at first glance, but it's a really useful section that I'm fairly confident that given a little time, you'll be using elements of on a regular basis.



Some context first – when you're jotting things down in OneNote, you tend to jot down different types of information. Every page you write will be different, but just as an example, you might find that there are:

- Things that you need to do
- Things that you need to remember
- Things that you need to ask questions about
- Things that are really important
- Things that aren't really important
- Things that you don't understand
- Things that are great ideas
- Things that you need to discuss with someone

A composite image showing a woman with long blonde hair wearing a black VR headset, looking upwards with a surprised or excited expression. To her right is a red advertisement for MT Højgaard. The ad features the company logo (a stylized 'M' and 'H') and the text 'MT Højgaard'. Below that, in large white letters, is 'BEDRE LØSNINGER'. A block of Danish text follows: 'I MT Højgaard insisterer vi på, at der findes en bedre løsning. Vi udvikler og anvender metoder og teknologier, der sætter nye standarder for bygge- og anlægsbranchen. Vi har fokus på hele tiden at videreudvikle vores medarbejdere, så vi gennem nye teknologier og nye samarbejdsformer kan transformere bygge- og anlægsbranchen. Vil du med på holdet?' At the bottom of the ad is the website 'mth.dk/vorestilgang'.



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To make it easy for you to identify notes that you've added as fitting into one or more of those categories, OneNote provides you with the ability to Tag whatever you've entered with one or more Tags that represent those categories. All OneNote does is adds a little icon to the side you can visually recognise what that note was about whenever you look at it.

It's not something that you're likely to use on your first couple of outings with OneNote, but the quicker you start using it, the more you'll find it useful. It's one of those "I can't believe I didn't use this before" tools, and it **will** make things easier for you.

As an example, let's say that you're going on holiday, and you've created a notebook called "Holiday" (because you're logical like that). While you're typing away one day, you think, "I wonder if my passport is still in date". You type in "Check if passport is still in date" into OneNote so you'll remember to do that at some point, hopefully before you go on holiday.

My First Page

19 July 2014 16:08

This is a heading

This is some text

This is some more text

As is this

Check if passport is still in date

So you've got a record in your holiday notebook that you need to check if your passport is in date, which has to be a good thing. I'm not sure it's all that failsafe though, and the opportunity for you to forget is probably fairly high. If you've entered a lot of notes, your rather important To Do "Check if passport is still in date" may be lost in a world of other information that's perhaps less critical.

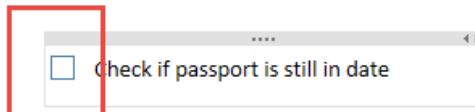
So you apply a To Do Tag to the text. You can do that from the Ribbon by choosing To Do from the Tag section of the Home ribbon, or you can use the keyboard shortcut to do it quickly. Which one you use should really depend on what you're doing – if you've got your hand on the mouse, then the mouse way might be the simplest way to do it. Likewise, if you've got your hands on the keyboard, then the keyboard shortcut may be the simplest way to do it. The keyboard shortcut to apply a 'To Do' Tag is Ctrl and 1 and once you've done it, it gives you an actual tick box by the side of your note.

My First Page

19 July 2014 16:08

This is a heading

This is some text
This is some more text
As is this



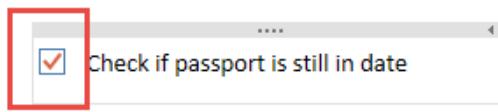
That means that you can really quickly hone in on the actions that you've got to carry out whenever you look at your page. You can also use it as a tick box so you can mark the To Do as complete. When you've completed it of course.

My First Page

19 July 2014 16:08

This is a heading

This is some text
This is some more text
As is this



Ses vi til DSE-Aalborg?

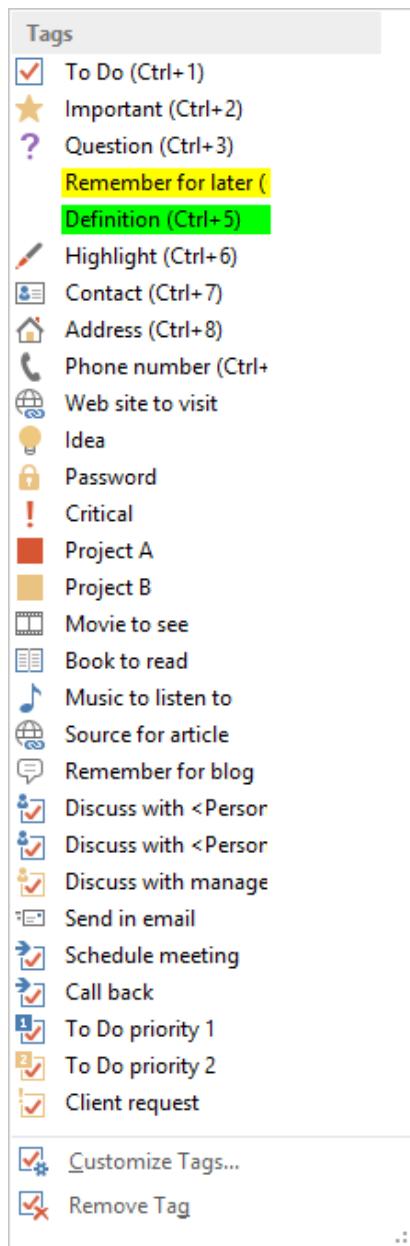
Kom forbi vores stand den
9. og 10. oktober 2019.

Vi giver en is og fortæller
om jobmulighederne hos
os.



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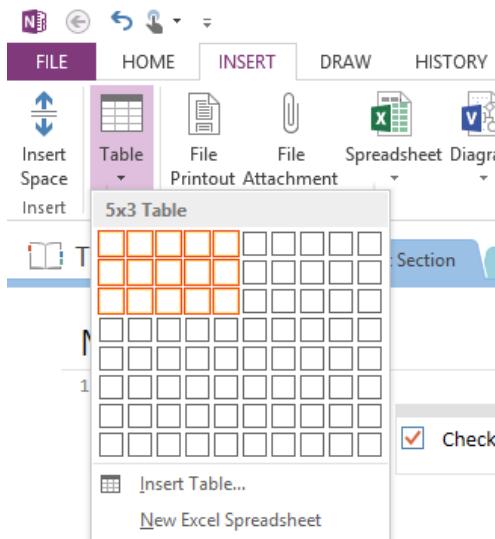
Here's the full list of Tags you can use by default in OneNote, however if there isn't a tag for what you're after, then you can easily customise to create your own using the Customise Tags option at the bottom of the Tag list:



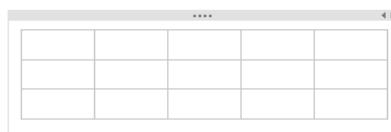
The basic approach to getting the best out of tagging is similar to the approach throughout OneNote. You want to be able to quickly and intuitively use tools without having to think too much about them, otherwise they get in the way. Take a look at the few tags at the top of the list – each of which has the appropriate keyboard shortcut listed by its side. Experiment with a few of them – just try the To Do one for starters if it helps you get used to the concept. When you've typed an action, hold down Ctrl and press 1 and all the hard work will be done for you and you can move on.

10 Creating Tables

If you've used Tables in Microsoft Word, then the basic premise of tables in OneNote will be familiar to you. Indeed, the core tools available to you are consistent across all of the Microsoft Office applications. To Insert a Table in OneNote you can go to the Insert Ribbon, Choose Table and drag over the appropriate number of rows and columns.

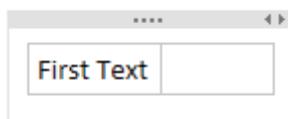


When you let go, your table will be created:

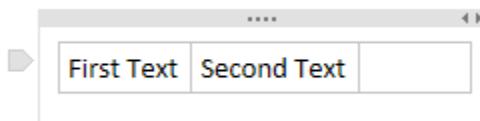


What's surprising about OneNote tables is that they're actually easier to use in OneNote than they are in Word or any other Office application. Instead of going through the steps above, try this instead:

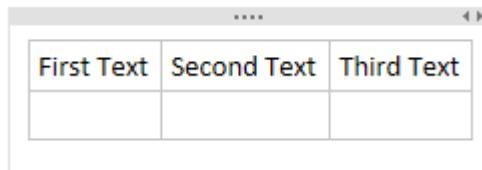
Type something and then press tab. Hey presto! A table appears.



Type something else and press tab – there's another column.



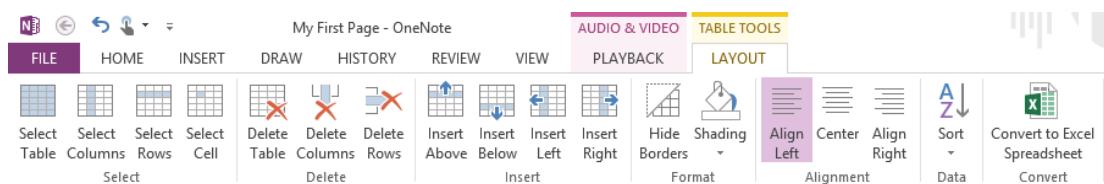
When you've added all the columns you need, press enter and OneNote moves down to the next row.



Now you can just type and tab your way through the entire table – tab in the last cell of the last row and a new row will appear.

That really makes the creation of a table an intuitive process. Type and Tab. Type and Tab. It even works with text that you've already typed. If you click at the end of some text you've already typed and press Tab, OneNote will put the text you've typed into a table and add a new column to the right of it. If you've got a list of items, click at the end of each item and press Tab, and OneNote will arrange them all into a single, properly aligned table.

Once you've created your table, thanks to the wonders of the ribbon, you've got the core Table editing tools available that you'll find in other applications. Important note: the table editing tools will only be visible once you've clicked on the table. If you're hunting for them and they're not visible, then click on the table – that's the trick to make them appear.



The Table tools available are all found under the Layout Ribbon. On the Layout Ribbon you'll see options that will allow you to Insert or Delete Rows, Columns and Cells. To make it as easy as possible, you can choose to Insert Above, Below, Left or Right of wherever you've got clicked. Get it wrong, then you can just undo (Ctrl Z if you're feeling particularly productive) and try it again.

11 Summary

And that's Microsoft OneNote – you might have guessed that I'm rather fond of it, but just in case that didn't come across, let me tell you that I'm rather fond of it. It's the one product that Microsoft make that I use each and every day, and it's one that I get more and more out of as time goes by.

It's a tool that anyone can use. At its simplest, you just click and type, but it's capable of so much more.

Once you've got the hang of it, you'll be creating, ordering, reordering, tabling, tagging and a whole host of other things in no time at all, and you'll be doing it all without really having to think about it. That's probably my key message for you – if you have to think too much about it, you're probably trying to do too much with it right now. Take it easy, take it one step at a time, and you'll find that you've got a great new tool in your toolbox.

Have fun.

Mike Gurner

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