

How to Use OneNote With Your Outlook Calendar

If you're like most of us, a lot of your important tasks and notes arrive via email. You've been using your Microsoft Calendar and To-Do-List to keep track of your tasks, but you want to do more.

Most people don't realize that you can use MS OneNote as an Outlook task manager with the Outlook Calendar To-Do-List tools. By adding OneNote to MS Outlook, you can not only track your tasks, you can also keep track of other information that arrives by email in handy notebooks with tabs. There are even OneNote collaboration features you can use to share your information with others.

In this tutorial, we'll show you how to activate the OneNote feature in MS Outlook. We'll also show you how to use OneNote to effectively manage your tasks and notes. We'll share how MS Outlook can help you store and organize your incoming email messages. Finally, we'll share a cool hack for using MS OneNote along with the Outlook calendar to take meeting minutes and distribute them to meeting participants.

In this tutorial, you'll be learning how to use OneNote and Outlook for project management tasks. Now let's move on to our tutorial on how to use Microsoft Outlook with OneNote.

What Is Microsoft OneNote?

MS OneNote is a notetaking/to-do-list tool that comes as a part of MS Office suite. It allows you to organize and store information as well as keep track of meetings and tasks. When you were in school you may have used a notebook with tabs to keep your papers organized. OneNote works much the same way, except your notebook is now virtual and your tabs are called sections.

OneNote is integrated into MS Outlook and you can use it along with your MS Outlook Calendar and To Do List. It can also be integrated into other software productivity apps. OneNote also includes peer collaboration tools.

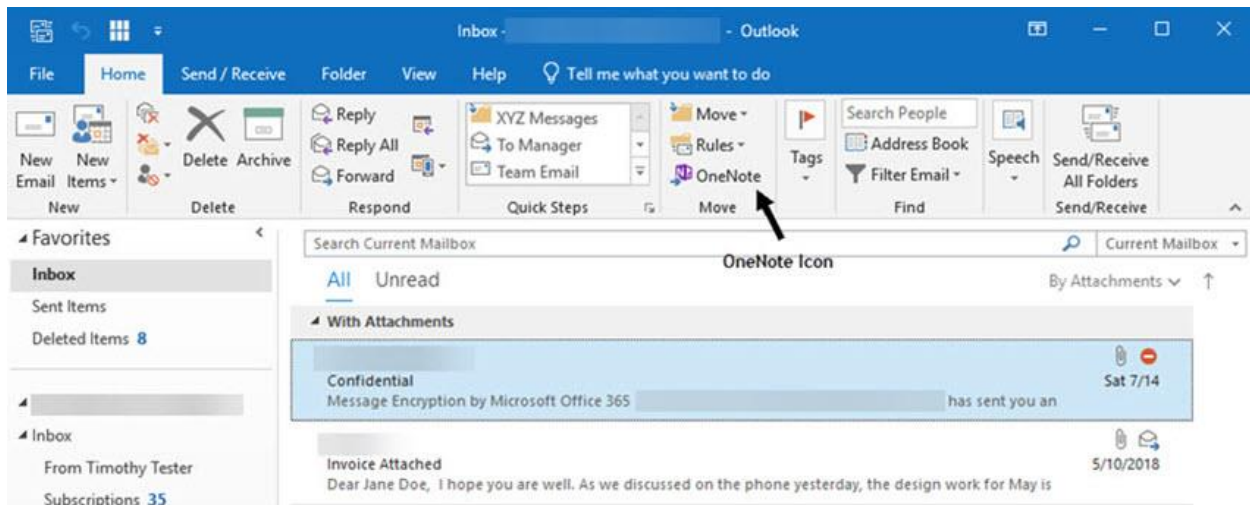
To learn even more about Microsoft OneNote basics, here are some tutorials:



Advertisement

How to Activate MS OneNote

Now that you've learned what MS OneNote is, you're ready to start using it. Before you can start using, the MS OneNote Add-in, you need to make sure it's enabled. If OneNote is enabled, you'll see a **OneNote** icon on the ribbon when the **Home** tab is selected:

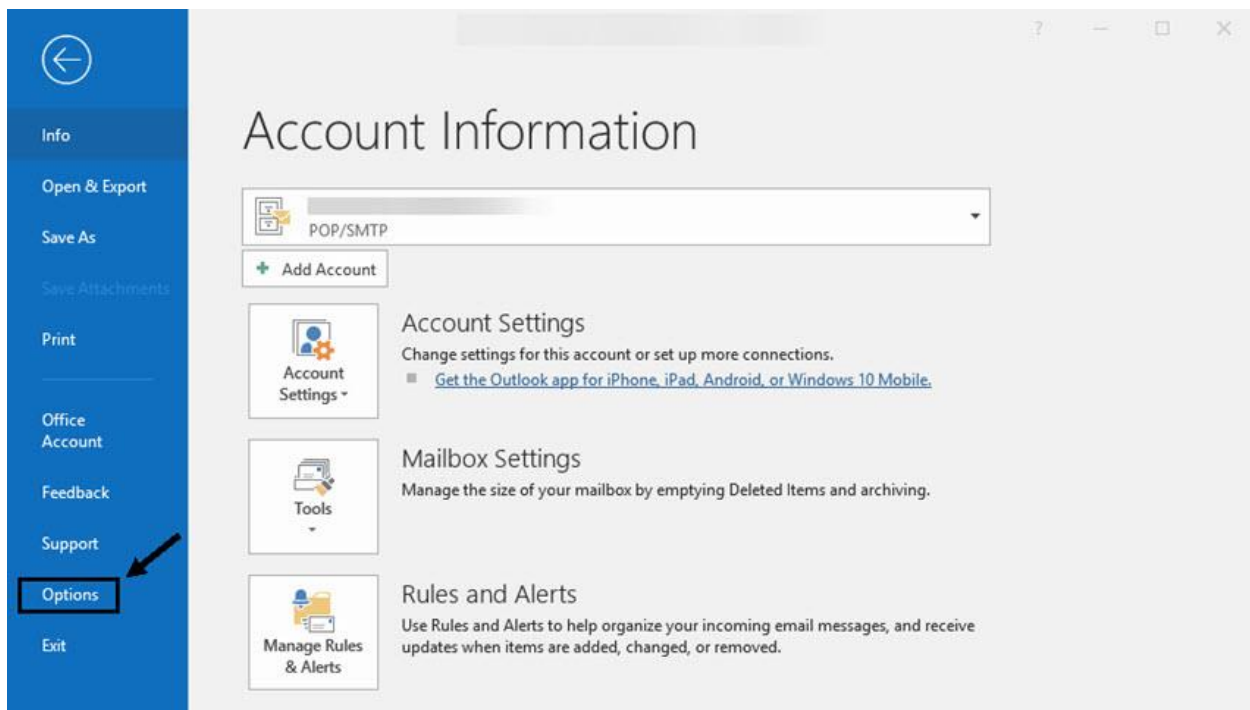


If OneNote is active with Outlook, you'll see a OneNote icon in the ribbon.

If OneNote isn't active in your version of Outlook, you'll need to activate it. Here's what to do

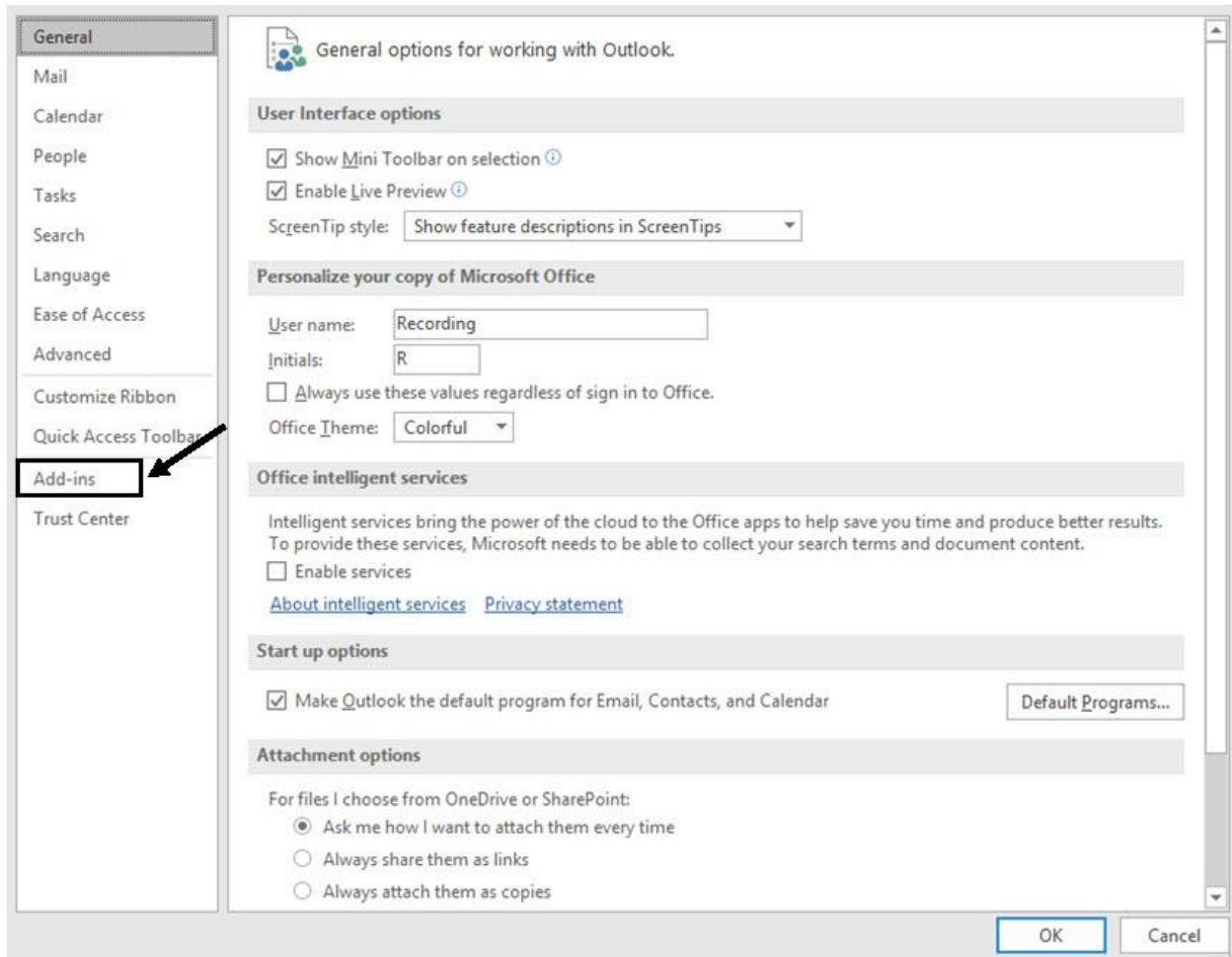
Step 1. Access the Outlook Options Window

Start with your Outlook email inbox open. Click the **File** tab. The **Account Information** window appears:



Select **Options** from the **Account Information** window to access the **Outlook Options** window.

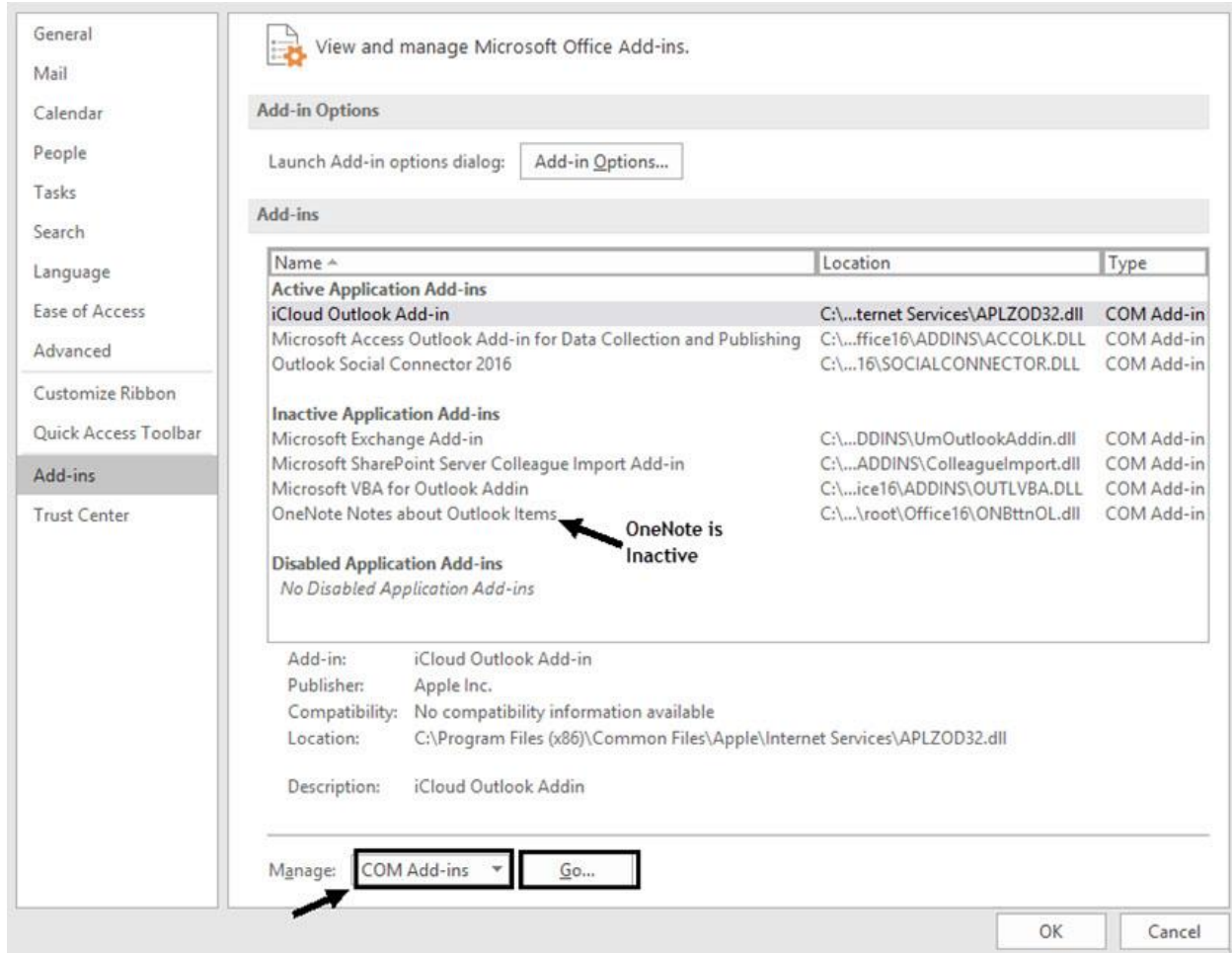
Click **Options** on the left. The **Outlook Options** window appears:



Select the **Add-ins** option to activate OneNote.

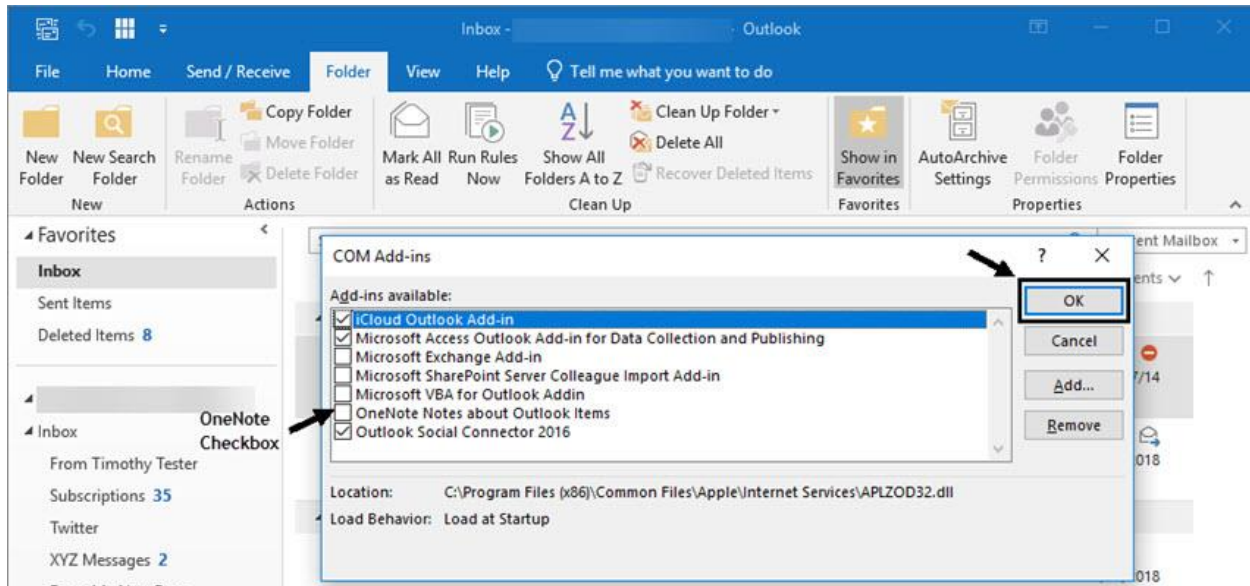
Step 2. Change OneNote to Active Status

Click the **Add-ins** option on the left. On the **View and manage Microsoft Office Add-ins** window you'll see lists of active, inactive, and disabled application add-ins:



You'll see lists of active, inactive, and disabled add-ins.

If OneNote is on the **Inactive Applications Add-In** list, select **COM Add-ins** next to **Manage** at the bottom of the screen. Then, click the **Go** button. The **Com Add-Ins** dialog box appears:



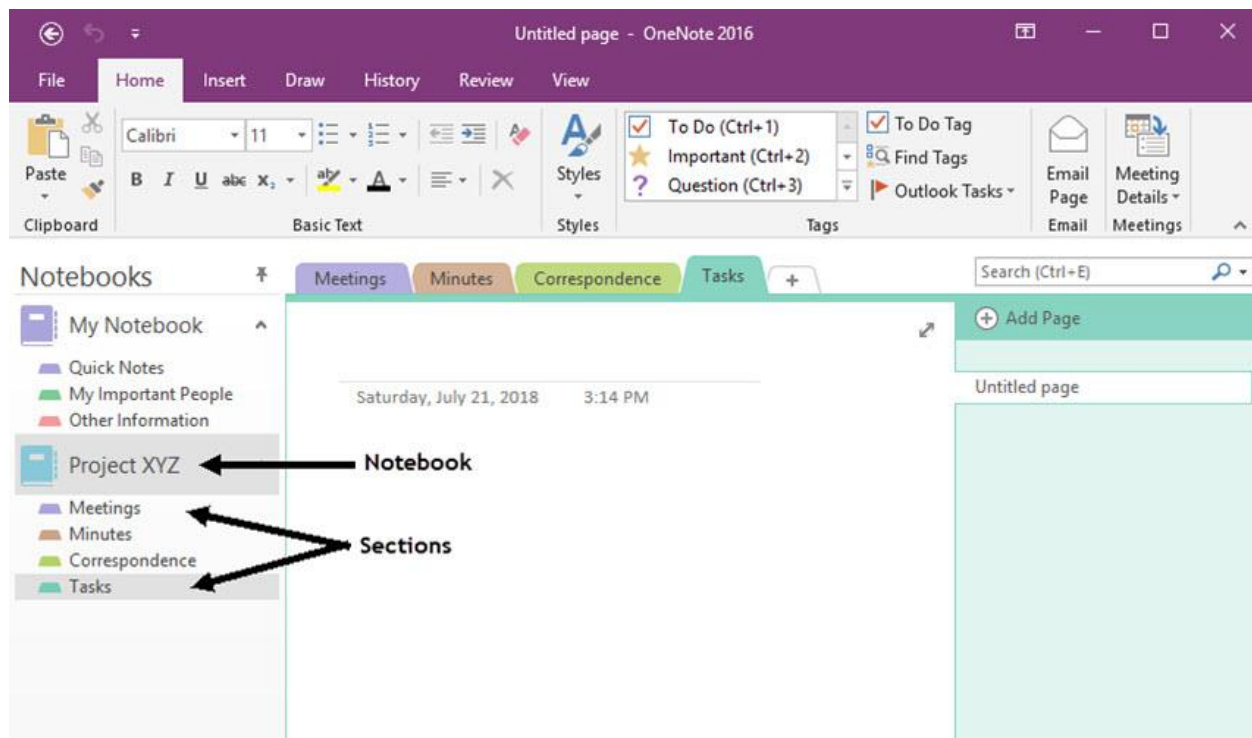
Add-ins without a checkmark are inactive.

Check the checkbox next to **OneNote Notes about Outlook items** to activate it, then click **OK**. The system returns to your inbox. You should now see the **OneNote** icon on the ribbon when the **Home** tab is selected.

How to Create Outlook Tasks in OneNote

Once you've activated OneNote, you can use it as an Outlook task manager by creating tasks in Outlook and saving them to OneNote or creating tasks in OneNote and saving them to Outlook. Let's get started!

The first thing you'll want to do is open OneNote on your desktop:



Notice that OneNote is organized into **Notebooks**. Each notebook contains **Sections** and each section contains **Pages**.

As you can see, I've already added a **Notebook** called **Project XYZ** to OneNote for us to work with. I also added some **Sections** (sometimes called folders) to the notebook. The sections I added are called **Meetings**, **Minutes**, **Correspondence**, and **Tasks**. On the right, you'll see a place for a list of **Pages** in the section that's currently open—it's the green section. (There aren't any pages on the list yet because we haven't created them.)

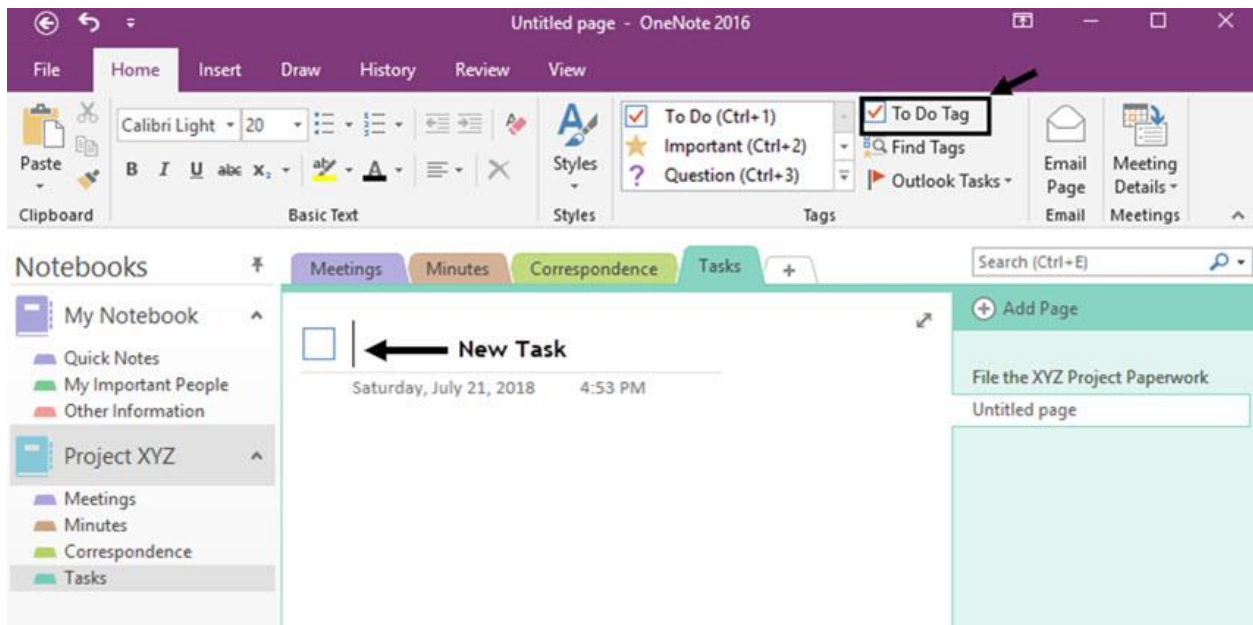
Create and name your own notebooks and sections according to your organizational needs.

1. Use OneNote to Add a New Task to Your Outlook Tasks List

You can add a task to your Outlook To-Do-List from OneNote. Here's how:

Step 1. Open Your Notebook Section and Add a Task

Start by opening the appropriate section in the correct notebook. In this case, I'll start with the **Tasks** section open in the **Project XYZ** folder. (I've already added a pre-existing task called **File the XYZ Project Paperwork** to this section. You can see it on the page list to the right.)

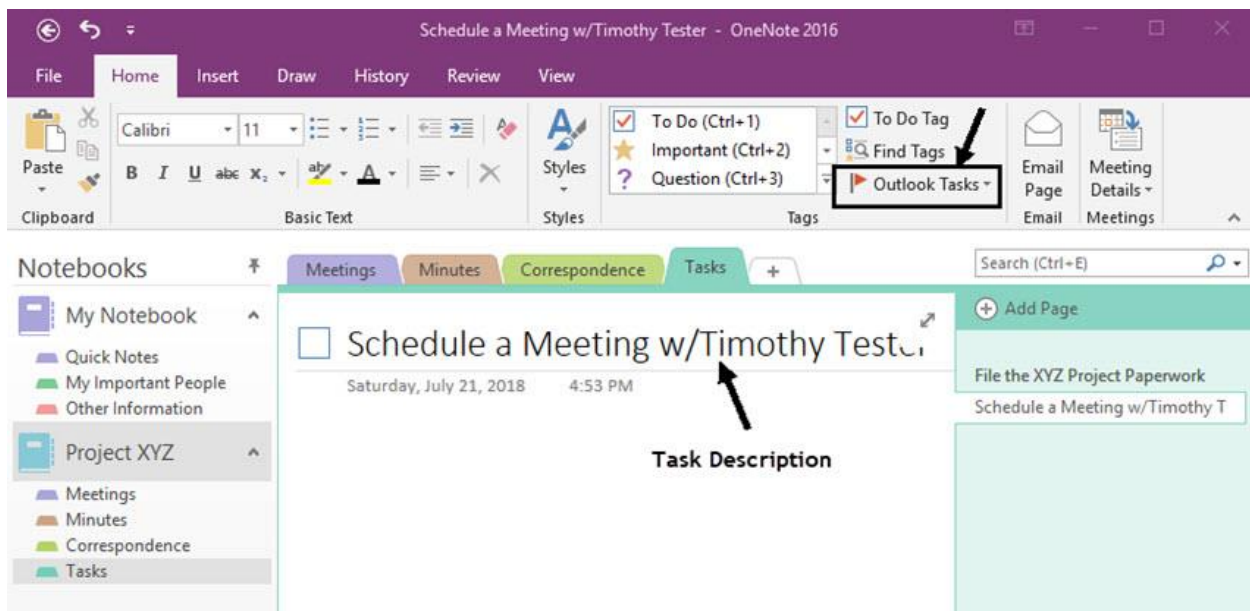


Once you've added a new task, type the name of the task next to the checkbox.

Click the checkbox next the **To Do Tag** icon in the ribbon. A checkbox, representing a new task, appears on a blank page in the section you've got open.

Step 2. Type the Task Description

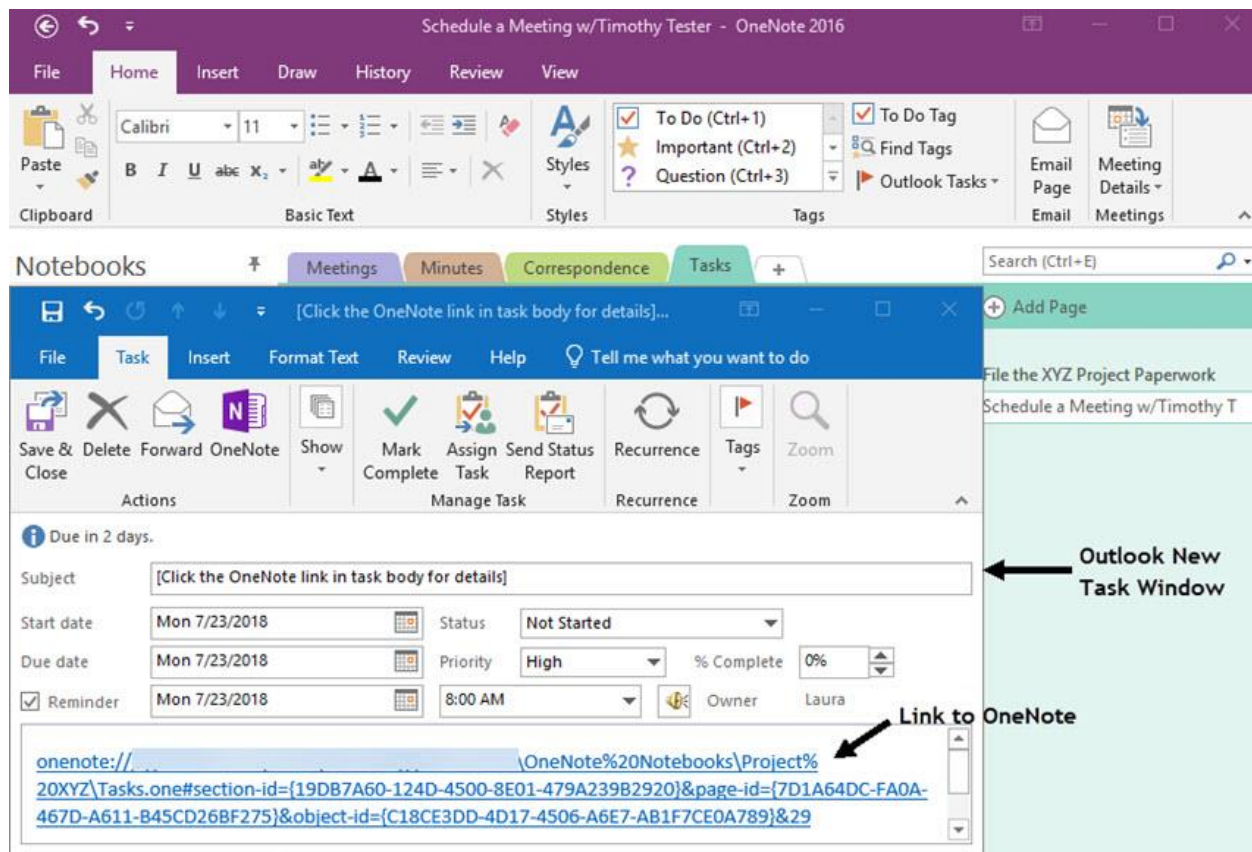
Type a description of the task in the blank space next to the checkbox.



The task name should describe the task so you can find it later.

Step 3. Schedule the Task and Add Details

When you've finished, click **Outlook Tasks** icon in the ribbon. From the drop-down menu, pick a timeframe for when you want to add the task to the Outlook tasks list. To schedule a specific date, select the **Custom** option. The Outlook **New Task** window displays:



Fill out the details in the Outlook **New Task** window.

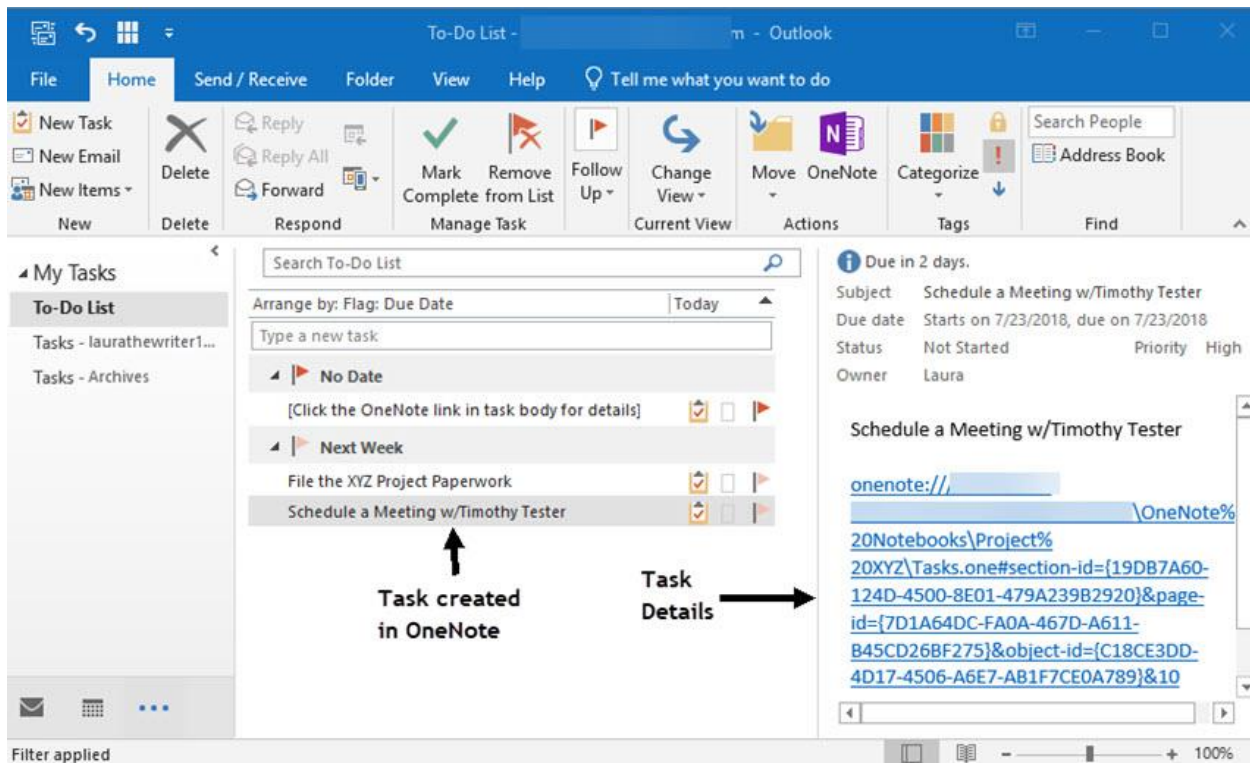
Now it's time to fill out the task details:

- Use the **Start date** and **Due date** fields to schedule the task.
- Describe the importance of the task using the **Priority** field (choose between **Low**, **Normal**, and **High**).
- Use the **Reminder** checkbox to have Outlook remind you about the task.
- Define the importance of the task using the Priority field.

When you're done filling out the **New Task** window, close it by clicking the **X** in the upper right corner of the window. Be sure to save your changes when Outlook prompts you to do so.

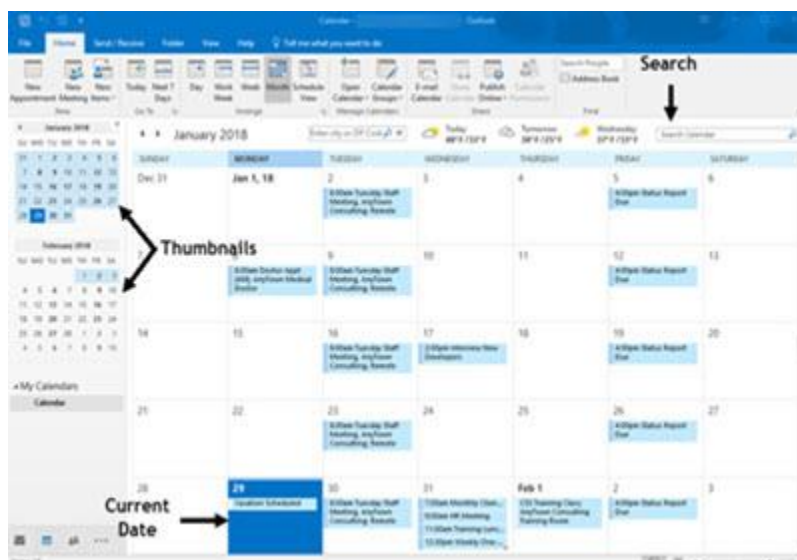
Step 4. View the Task in Outlook

To see the task you just created in OneNote, open your MS Outlook task list. You'll see the task you just created on the task list. The details appear in the pane to the right:



Note that the task description contains a hyperlink to the OneNote page we used to create the task.

You can now work with the task in Outlook just like you would any task you created using Outlook's task tools if you like. For more details on working with the **New Task** window, review this tutorial:



- [MICROSOFT OUTLOOK](#)
- [MS Outlook Calendar: How to Add, Share, & Use It Right](#)

- [Laura Spencer](#)

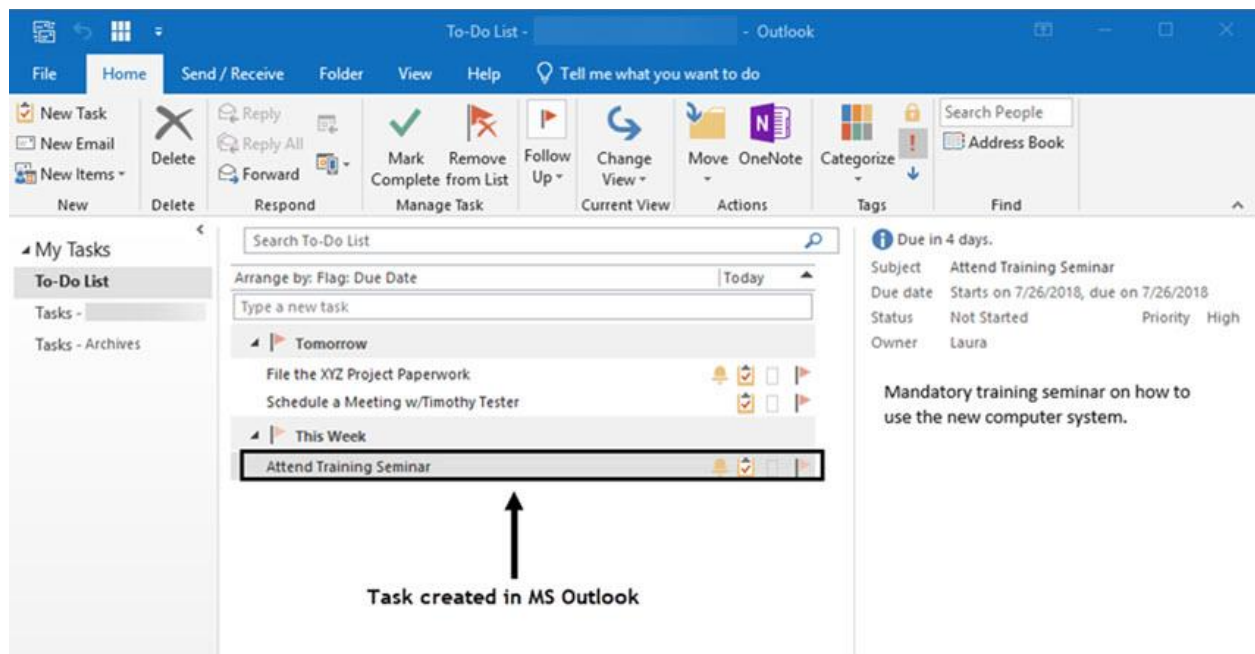
2. Add an Outlook Task to OneNote

Use OneNote as an Outlook task manager by saving tasks that are created in Outlook to OneNote. Here's what to do:

Step 1. Open Your Outlook To-Do-List and Select a Task

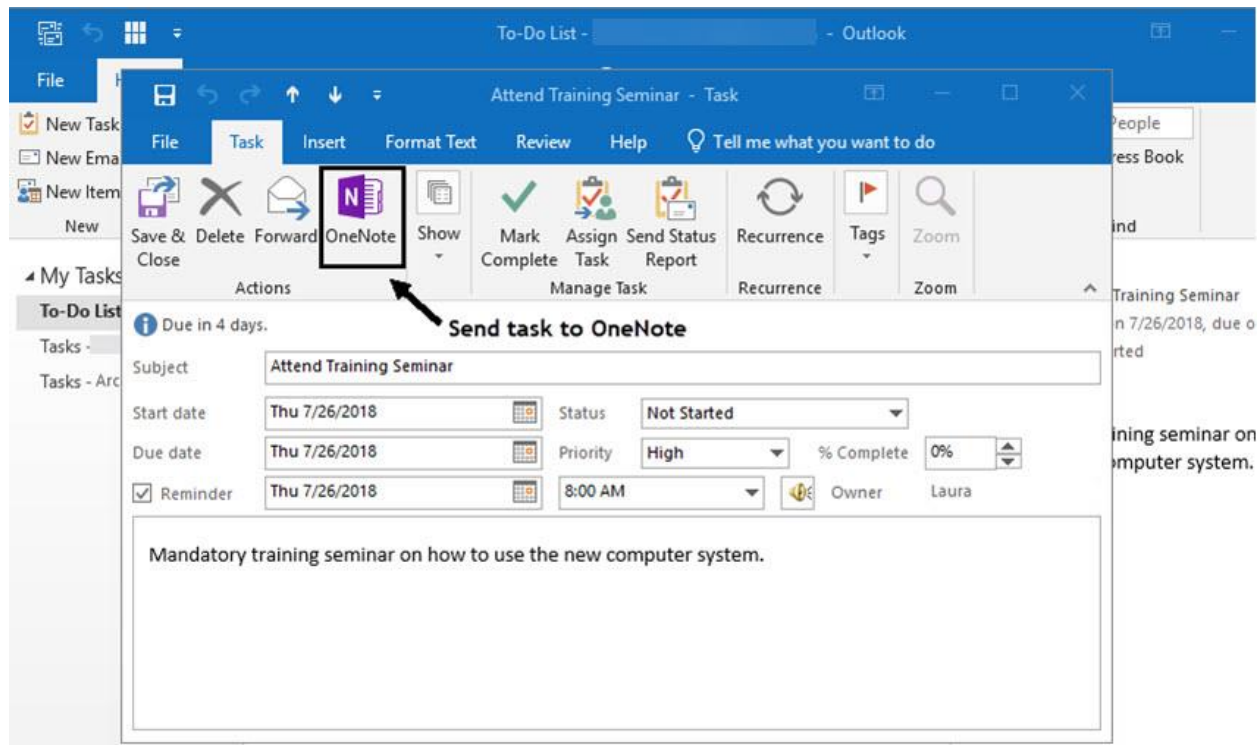
Start with your email inbox open and open your **To-Do-List**. (Click on the **More** icon at the bottom of the **Navigation** panel and select **Tasks** from the pop-up menu.)

Select a task that you've created in Outlook from the list. For our example, I've created a task called **Attend Training Seminar** in MS Outlook:



You can add a task created in Outlook to OneNote.

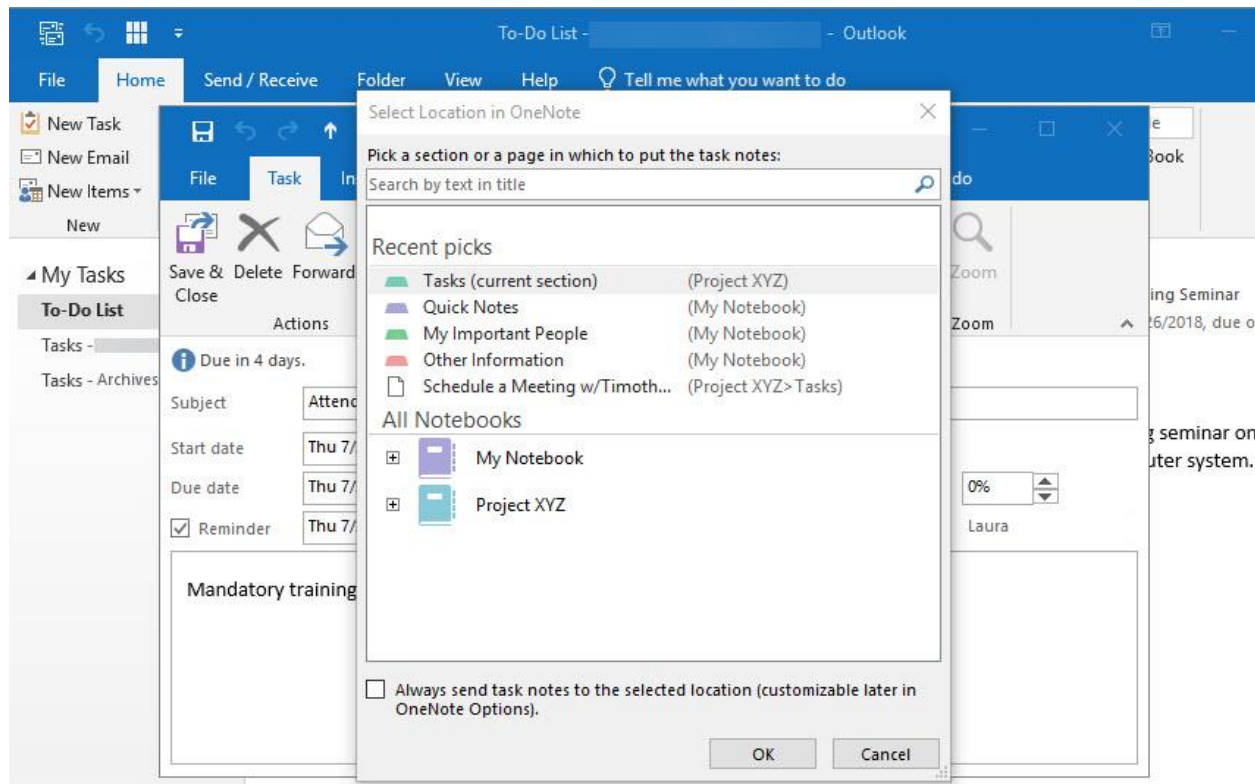
Double-click on the task you created in Outlook to open it.



Outlook tasks contain a OneNote icon that lets you save them to OneNote.

Step 2. Send the Task to OneNote

Click on the **OneNote** icon in the ribbon to send the task to OneNote. The **Select Location in OneNote** dialog box displays:

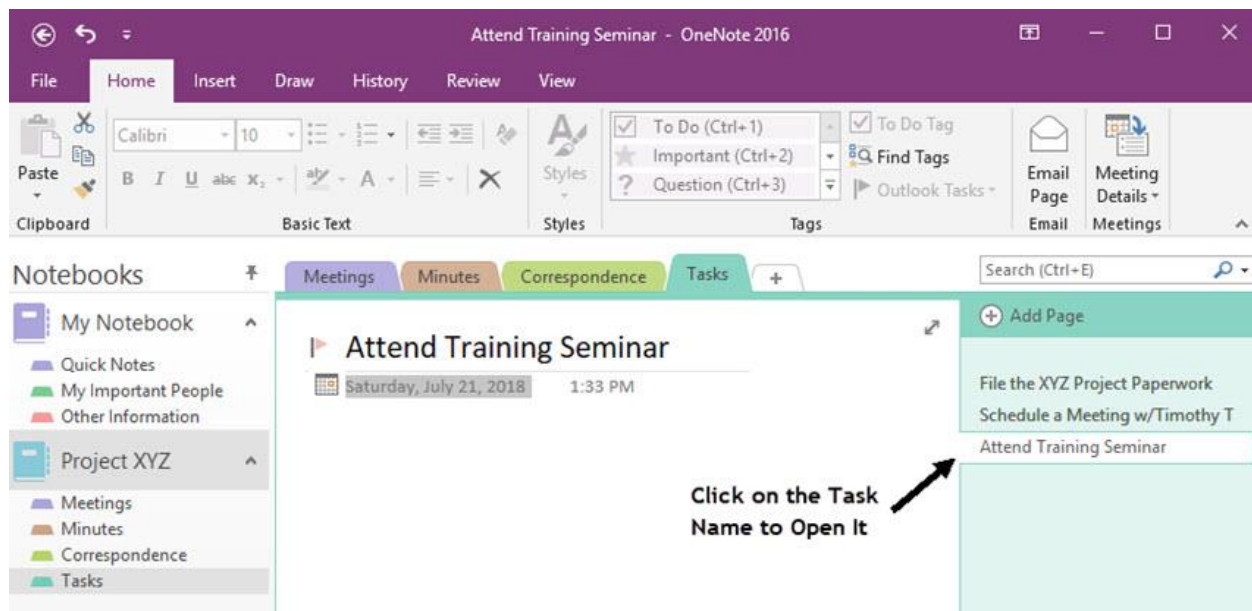


Use the Select Location in OneNote dialog box to choose a location for your task.

Click on a notebook to choose one of the sections inside or make a choice from the **Recent Picks** list. When you've chosen a location, click the **OK** button and close the open task.

Step 3. View the Outlook Task in OneNote

To see your task in OneNote, open the notebook and section where you stored that task. Click on the task name in the page list on the right to open the page containing the task you just created:



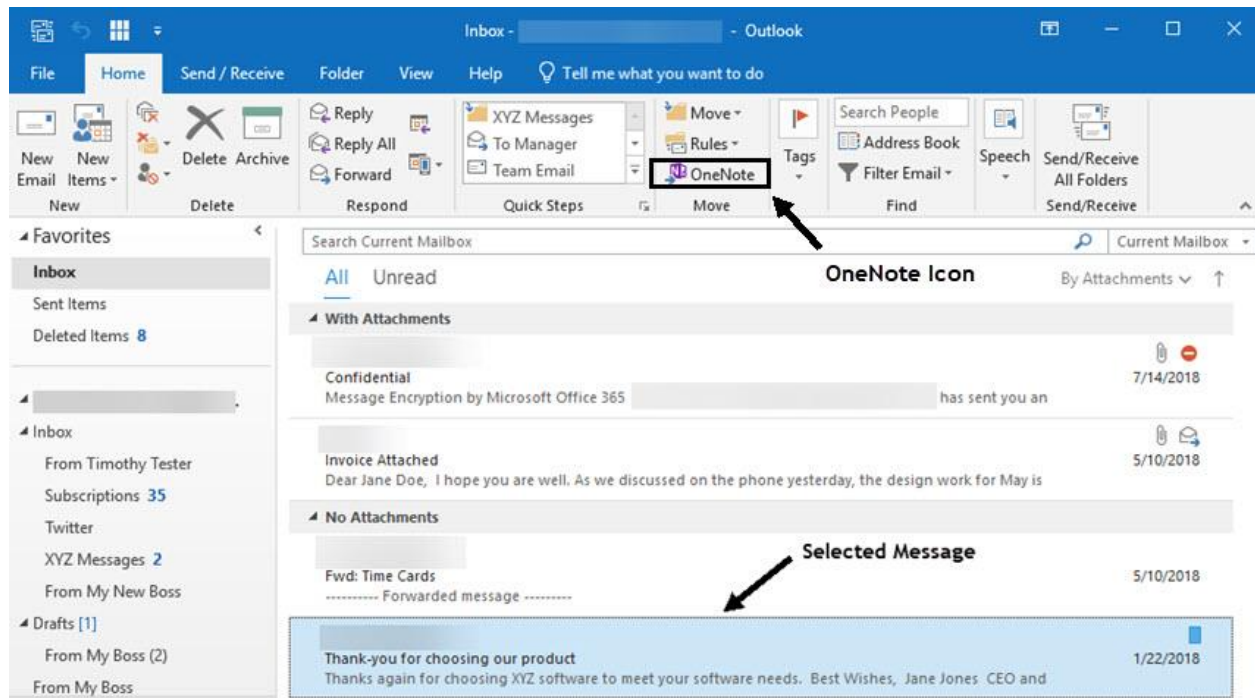
Your task has been added to OneNote.

How to Save an Outlook Email to OneNote

You can save an email to OneNote where you can make notes on it, scheduled tasks based on it, and more.

Step 1. Select an Email to Send to OneNote

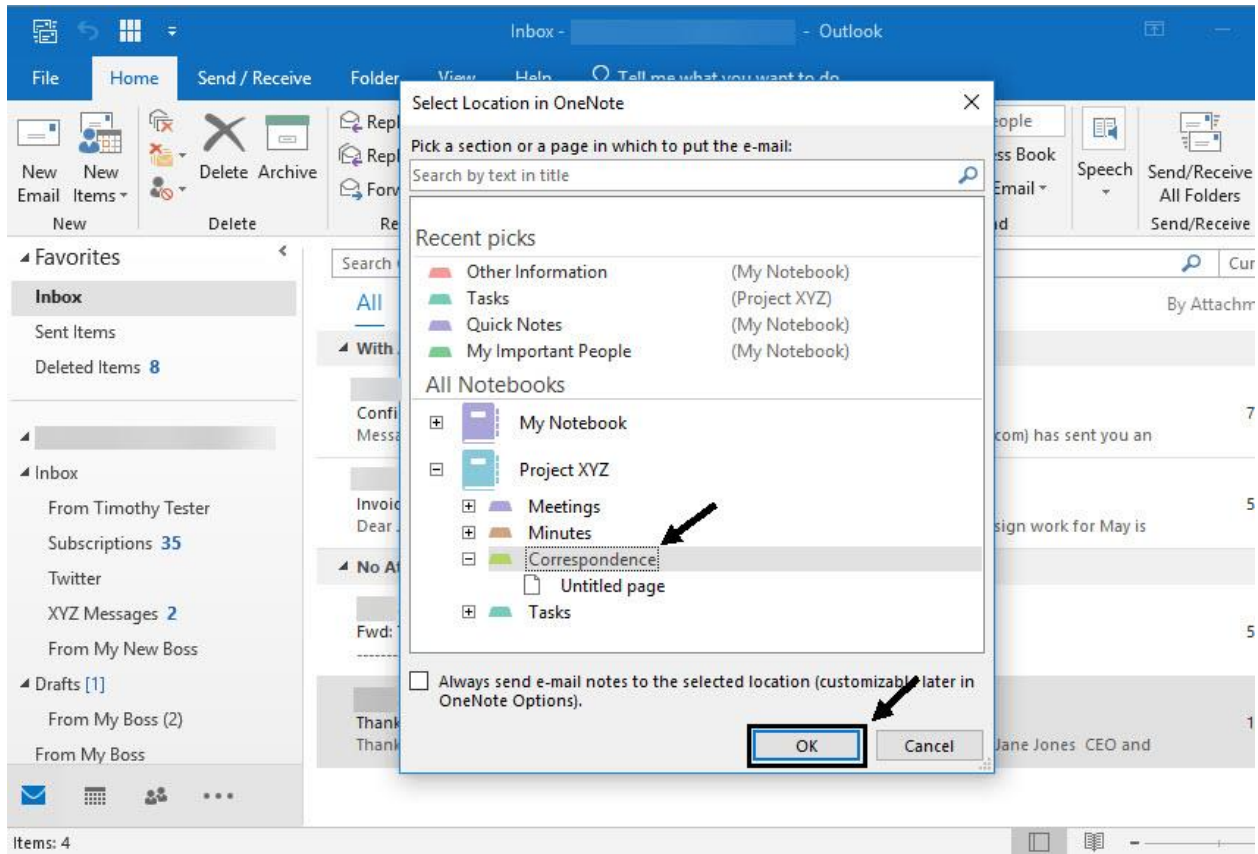
Start with your email inbox open. Select the message or messages you want to save to OneNote:



Select the Outlook email message you want to store in OneNote.

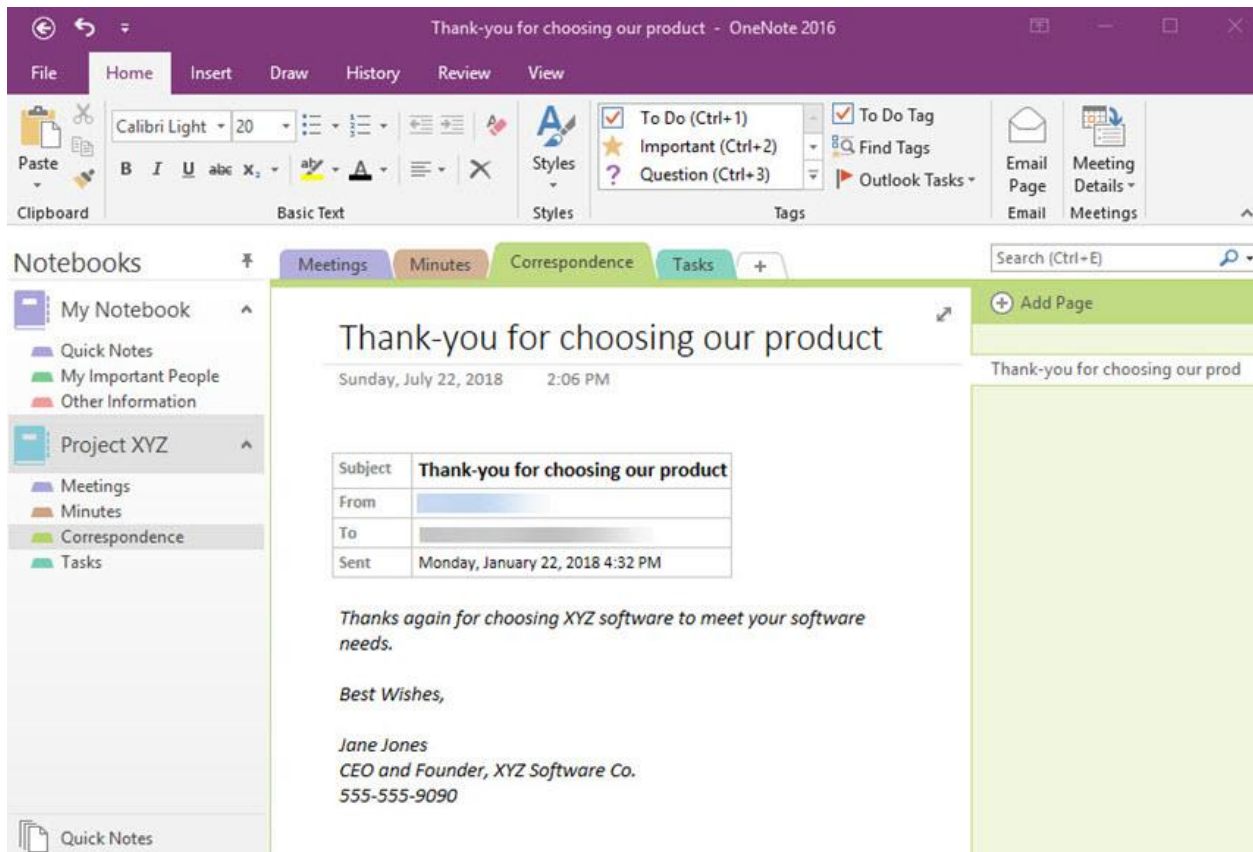
Step 2. Send the Email to OneNote

Click the **OneNote** icon in the ribbon to send the selected message to OneNote. The **Select Location in OneNote** dialog box displays:



Choose the location where you'd like to store the selected email message.

Click on the location where you want to store the email and then click **OK**. OneNote opens a new page with your email on it in the notebook and section you chose:



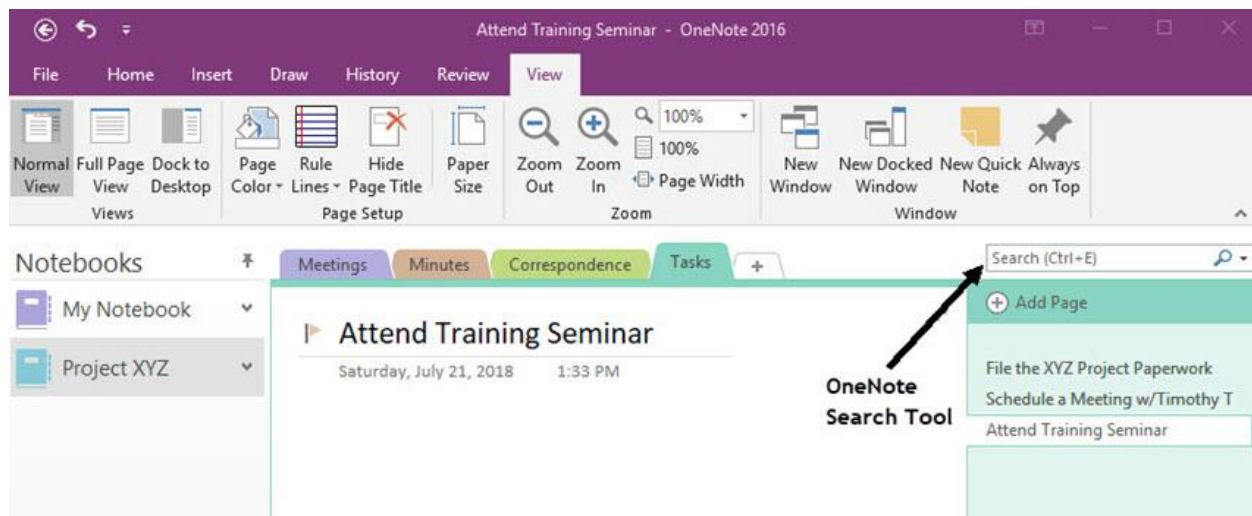
OneNote can help you store and organize your important Outlook email messages.

How to Use OneNote to Find a Task or Message

Once you get into the habit of using OneNote to store information, your notebooks might start to get full. You might worry that you won't be able to find what you're looking for. But OneNote has a pretty helpful search tool. Let's take a closer look.

Step 1. Open OneNote and Find the Search Tool

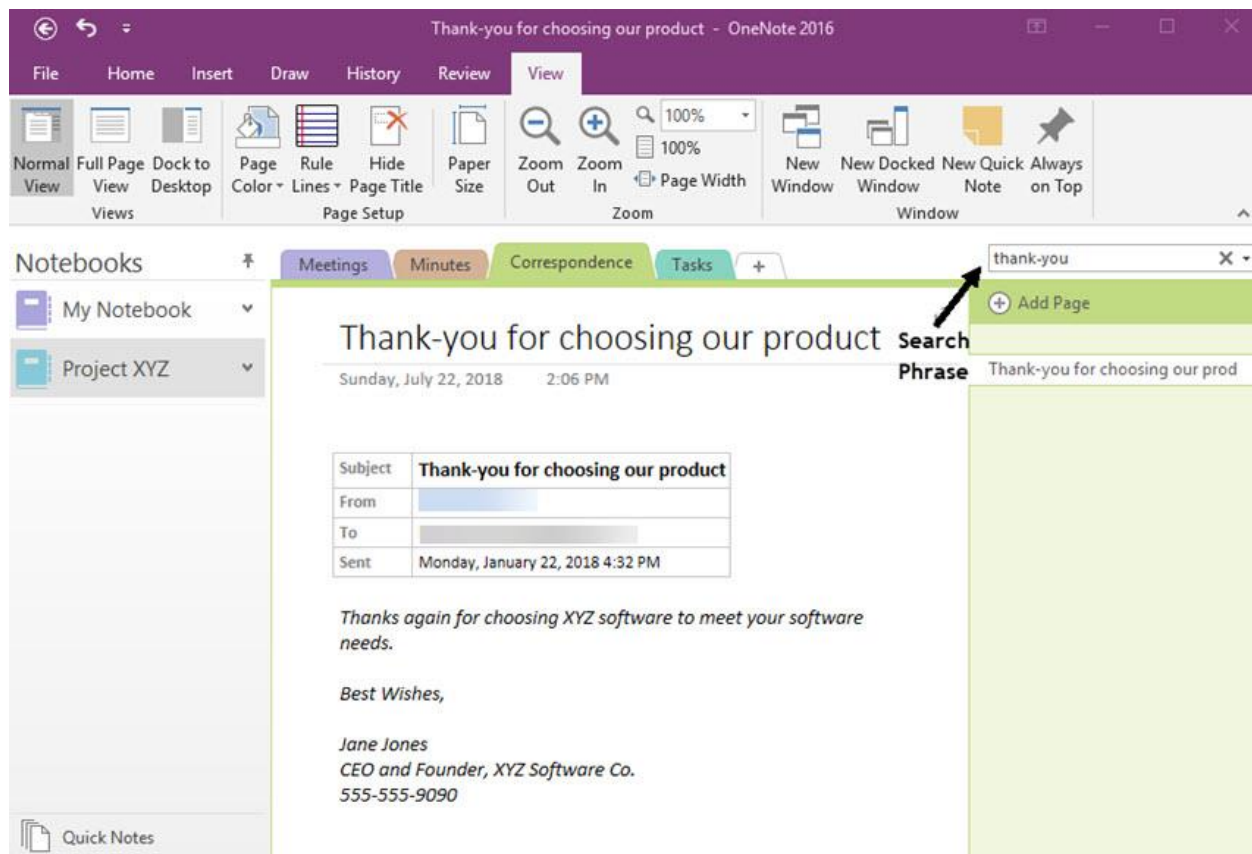
Start by opening OneNote:



If you forget where you've stored information in OneNote the **Search** tool can help you find it.

Step 2. Type the Search Phrase

I want to find the email I just saved to OneNote, but I can't remember where I put it. I do know that it contains the words "**thank-you**," so I type those words into the **Search** tool and press the **Enter** key when I'm done. The **Search** tool takes me directly to the OneNote page where I saved the email:



The **Search** tool found a message I was looking for.

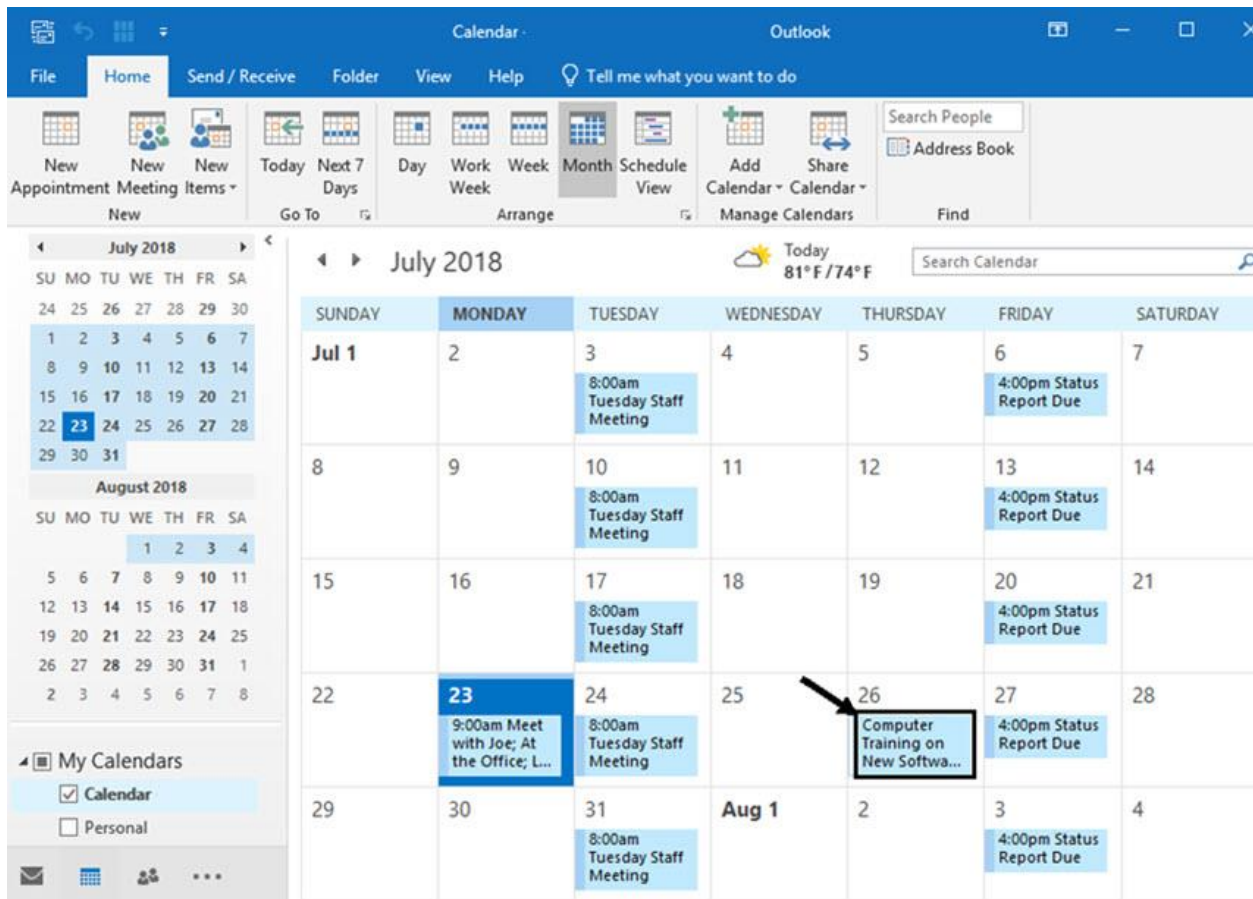
How to Use OneNote With Meetings

You can save time on your project management tasks by automating the meeting minute process. You can connect a meeting you've got on your Outlook calendar, take notes on that meeting, and email those notes to the other people who attended the meeting when the meeting is over.

Let's learn how:

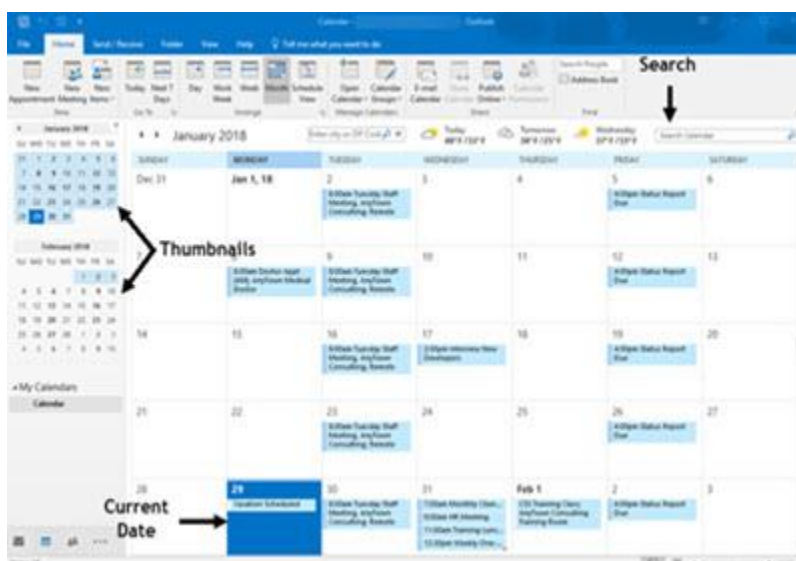
Step 1. Open Your Outlook Calendar

Start by opening your MS Outlook calendar:



You can add meetings from your MS Calendar to OneNote.

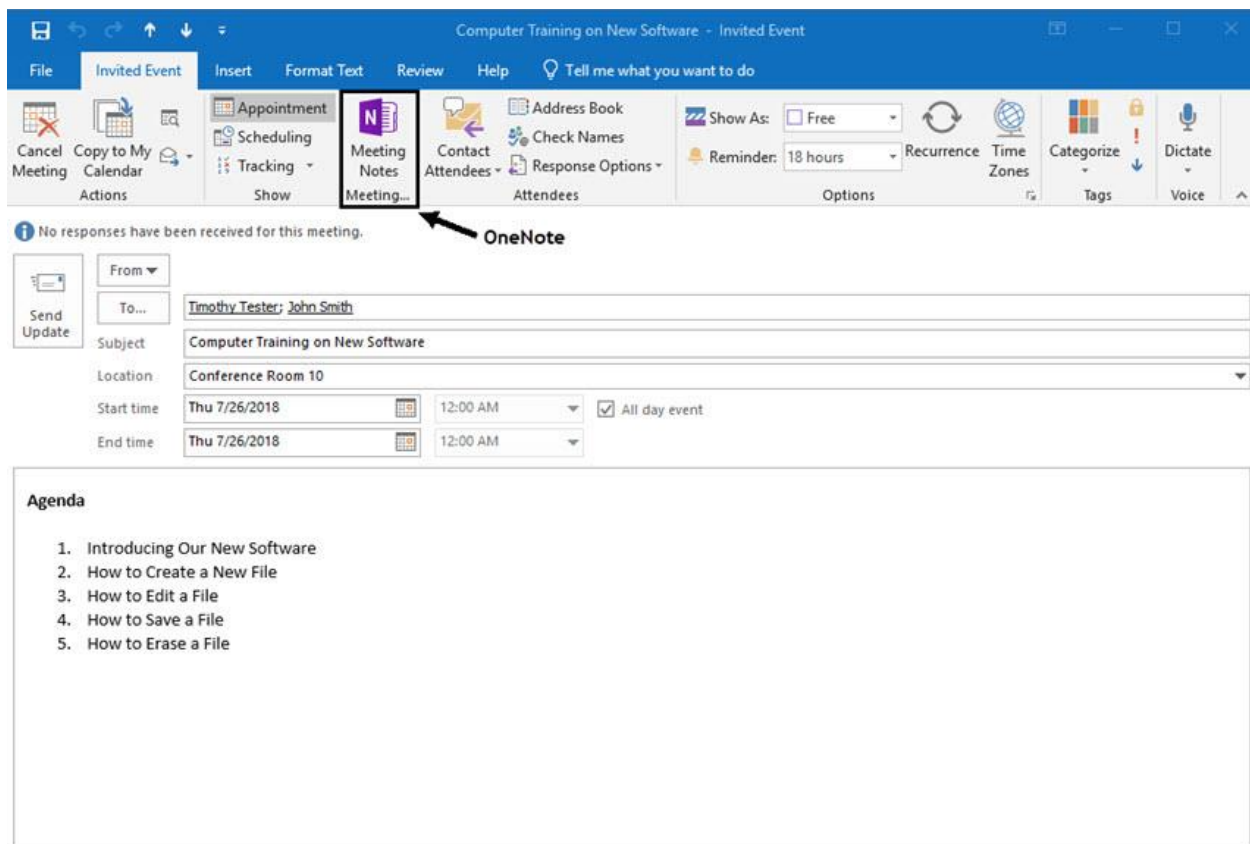
For more information on how to use the Microsoft Outlook Calendar tool, review this tutorial:



- [MICROSOFT OUTLOOK](#)
- [MS Outlook Calendar: How to Add, Share, & Use It Right](#)
- [Laura Spencer](#)

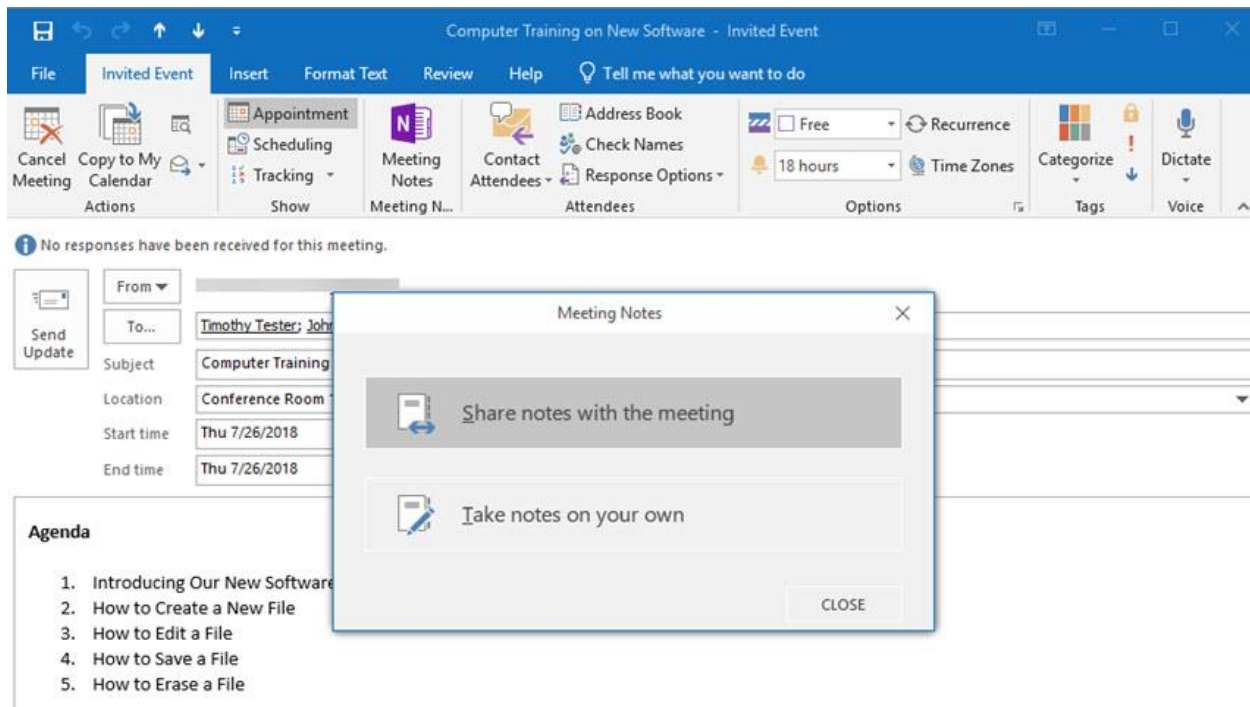
Step 2. Add a Meeting to OneNote

Find the meeting you want to add to OneNote and double-click on it to open the **Invited Event** window. In this case we're going to open the **Computer Training on New Software** meeting that I set up as an example:



This meeting is open in the **Invited Event** window in Outlook.

Once the **Invited Event** window is open, connect it to OneNote by clicking the **OneNote** icon in the ribbon. Notice that it says **Meeting Notes Meeting**. A dialog box appears asking whether you want to **Share notes with the meeting** or **Take notes on your own**:

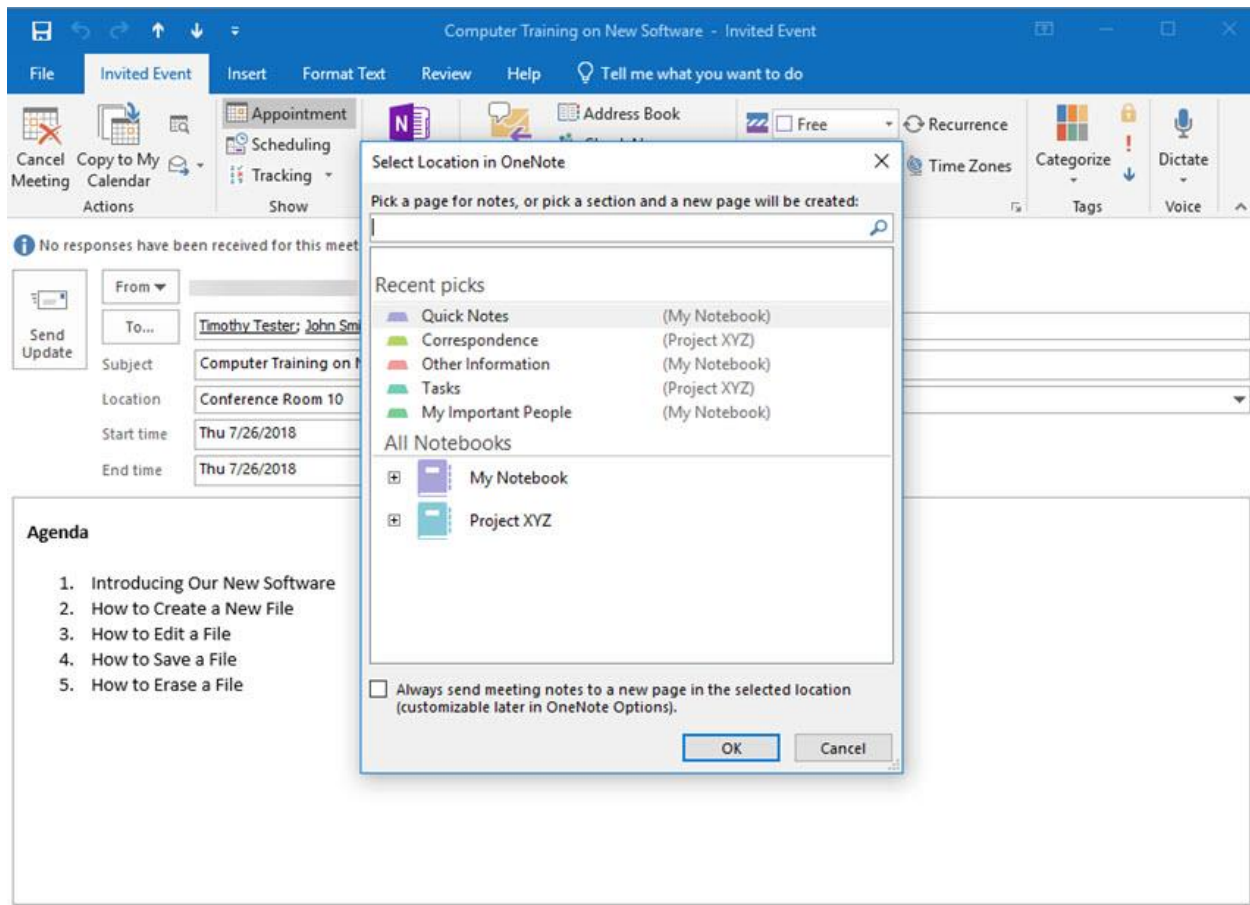


The **Meeting Notes** dialog box lets you choose between taking meeting notes in a shared OneNote notebook or taking them in a private notebook.

Choose one of the following:

- To share the meeting minutes in shared notebook, select the **Share notes with the meeting** option. ***Note:** you must have a shared OneNote notebook already set up to select this option.*
- To take your own notes privately, select the **Take notes on your own** option. These notes will only exist in your private notebook until you share them through email. This is the option we're going to use for this example.

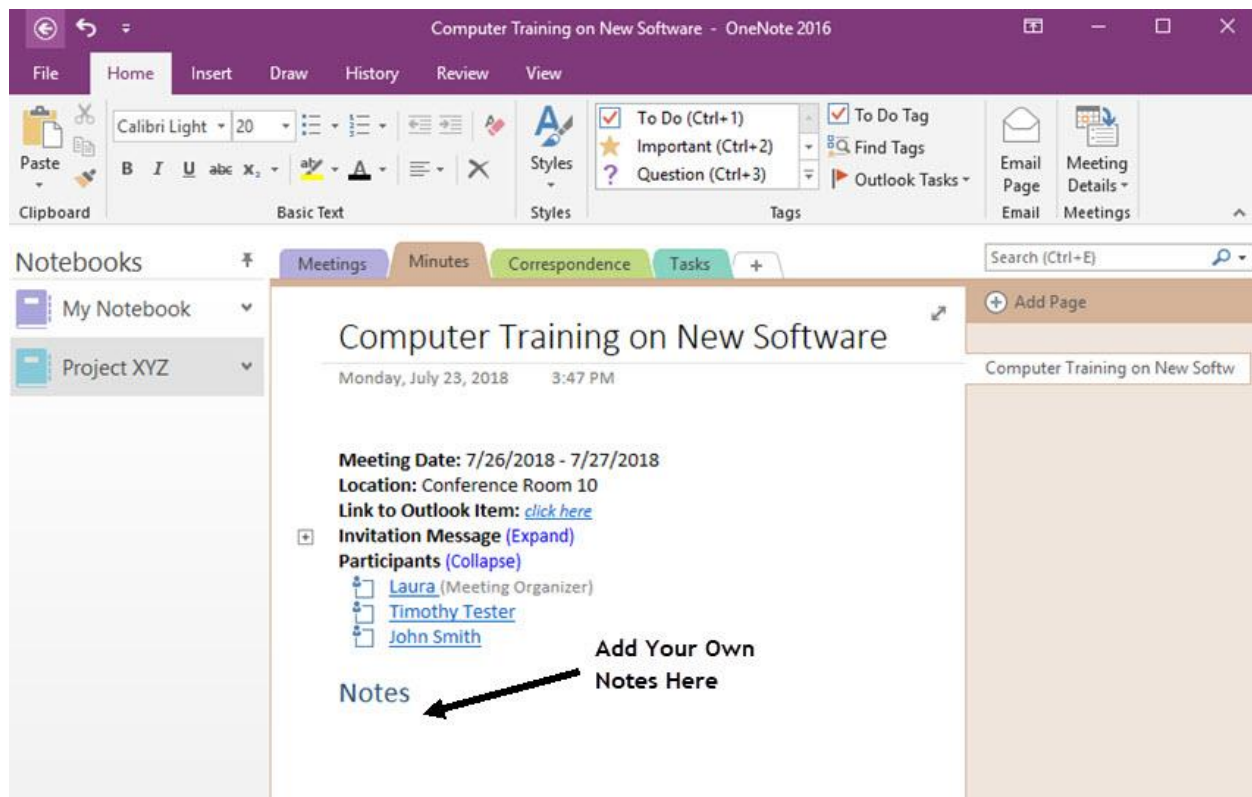
Select the **Take notes on your own** option. The **Select Location in OneNote** dialog box appears:



Choose the appropriate notebook and section for your meeting notes.

Step 3. Take Notes in OneNote

Click on a notebook to choose one of the sections inside or make a choice from the **Recent Picks** list. When you've chosen a location, click the **OK** button and close the open meeting. A new page containing your meeting information opens in the OneNote section and notebook you just selected:

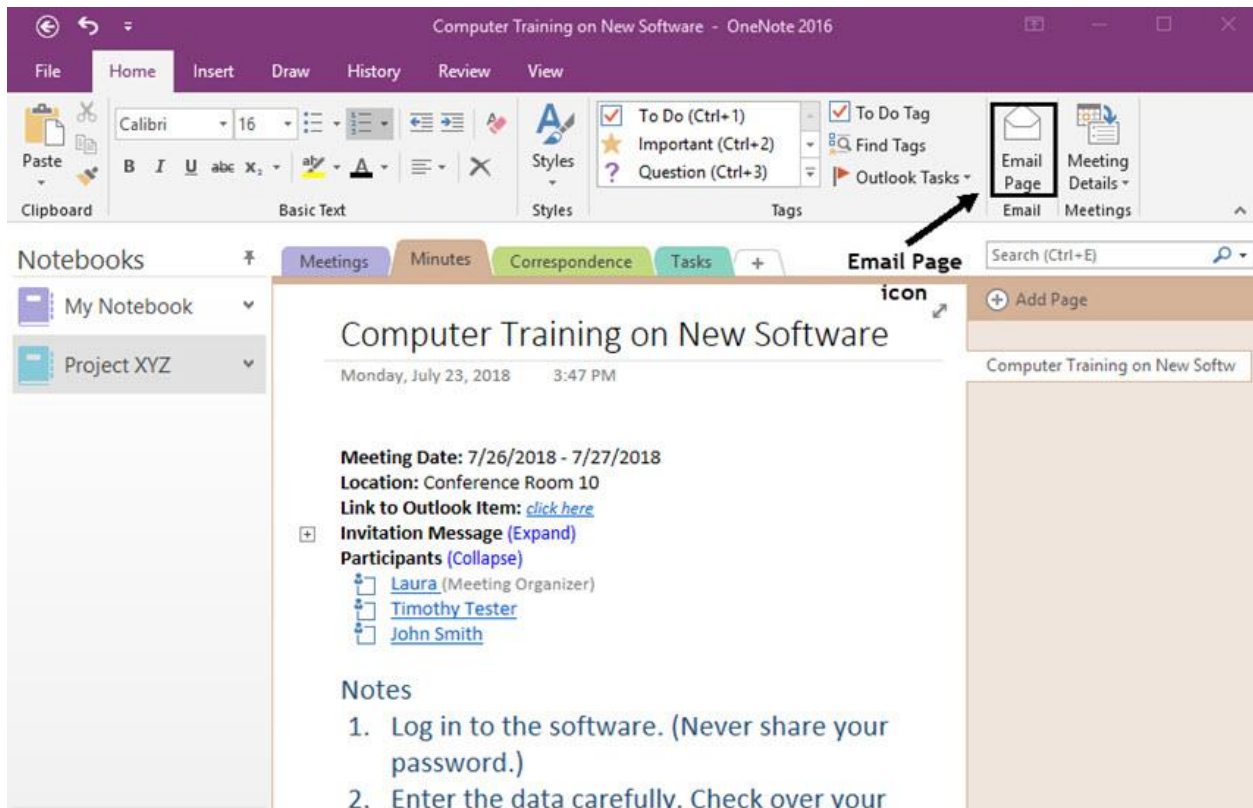


The meeting information has been added to OneNote.

Take notes on the open page in OneNote beneath the **Notes** heading.

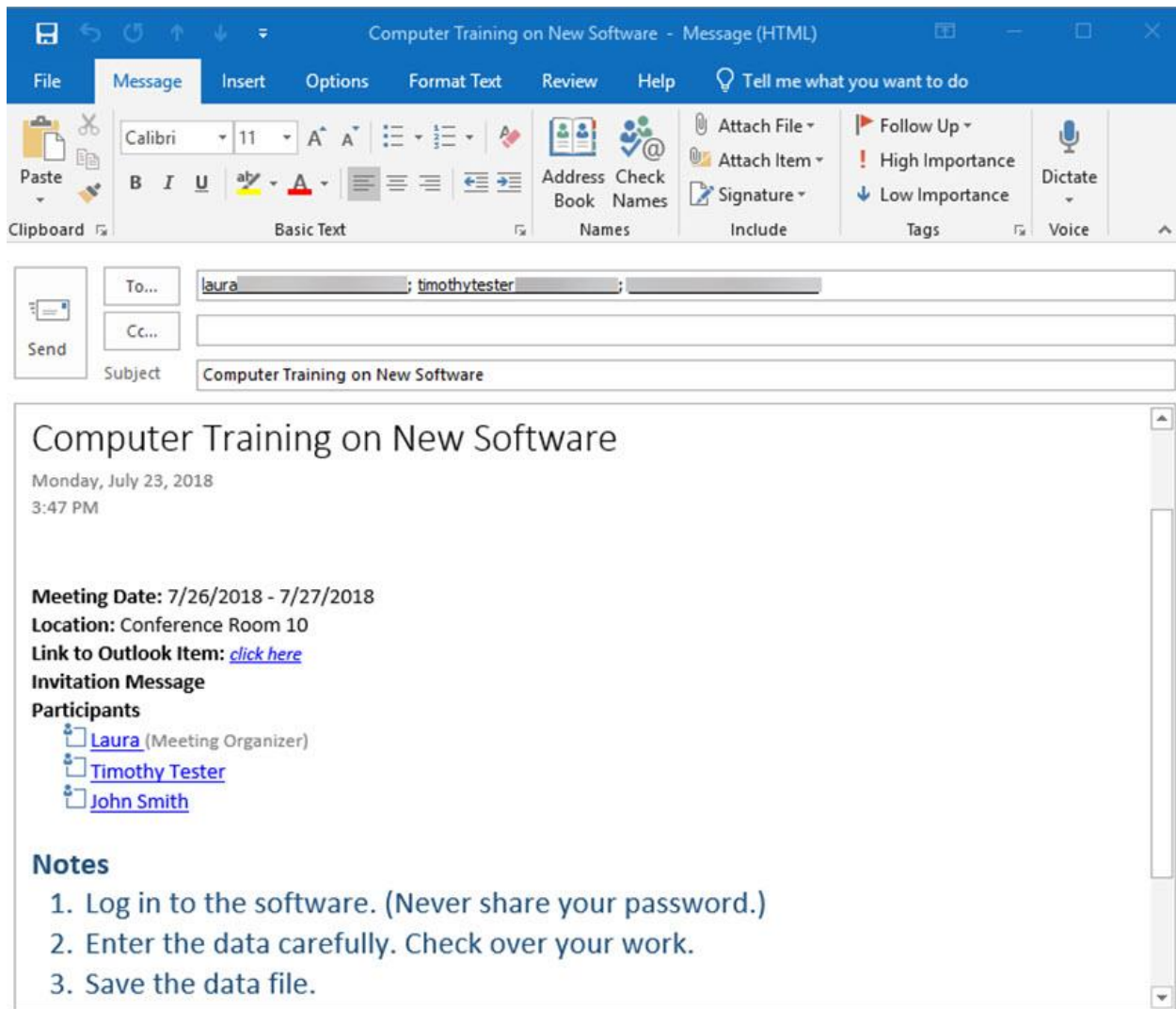
Step 4. Distribute the Meeting Notes With Outlook

When the meeting is over you can share your notes with everyone who attended the meeting by clicking on the **Email Page** icon in the ribbon:



Use the **Email Page** icon to send your meeting notes to meeting attendees.

An Outlook message opens with the meeting information and attendees at the top and your notes at the bottom:



You can add to the meeting minutes email or send it as is.

When you're ready, click the **Send** button on the left to send the meeting notes to the meeting attendees.

Conclusion

As you can see, OneNote and Outlook together can handle a lot of project management tasks. Using these tools together can help you work more effectively. You've just learned how to activate MS OneNote and use it in combination with Microsoft Outlook to organize your Outlook email, Outlook tasks, meetings, and other information.

You've also discovered how to use OneNote as an Outlook task manager. I've explained how to save email to OneNote folders. Plus, we've gone over a cool timesaving tip for storing meeting information to OneNote and using OneNote to both take meeting minutes and distribute those meeting minutes to meeting participants.