BrainStorm Quick Start Card for
Microsoft® OneNote® 2013

BRAINSTORM
Teaching Software. Teaching People.

Getting Started

Microsoft® OneNote® 2013 is the digital notebook you can take anywhere and share with anyone. When you store a notebook in the cloud, you can open it from almost any device at any time. You have instant access to all your essential notes, from random ideas to linked meeting minutes to embedded spreadsheets and other documents. And with upgraded touch features and drawing tools, you can make your notes entirely your own. OneNote 2013 raises note-taking, organization, and collaboration to a whole new level.

Quick Access Toolbar: Click the arrow to customize. Includes favorite commands, such as Touch/Mouse mode or Favorite Pen.

Drawing Tools: Use your finger, a stylus, or a mouse to sketch, doodle, or write on a page. You can even convert your handwriting to text.

Ribbon Options: New Click to change how the ribbon appears. You can automatically hide it, show tabs only, or show tabs and commands.

Backstage View: Click the **FILE** tab to perform tasks such as Print, Share, and Export.

Notebooks: New Click the current notebook name to open a different notebook, create a new one, or look at your Quick Notes.

Sections: Divide your notebook into sections (shown as tabs) for easy organization.

File Embedding: New Embed a file from Microsoft Excel® or Visio®. The file appears on the page and is updated with the source file.
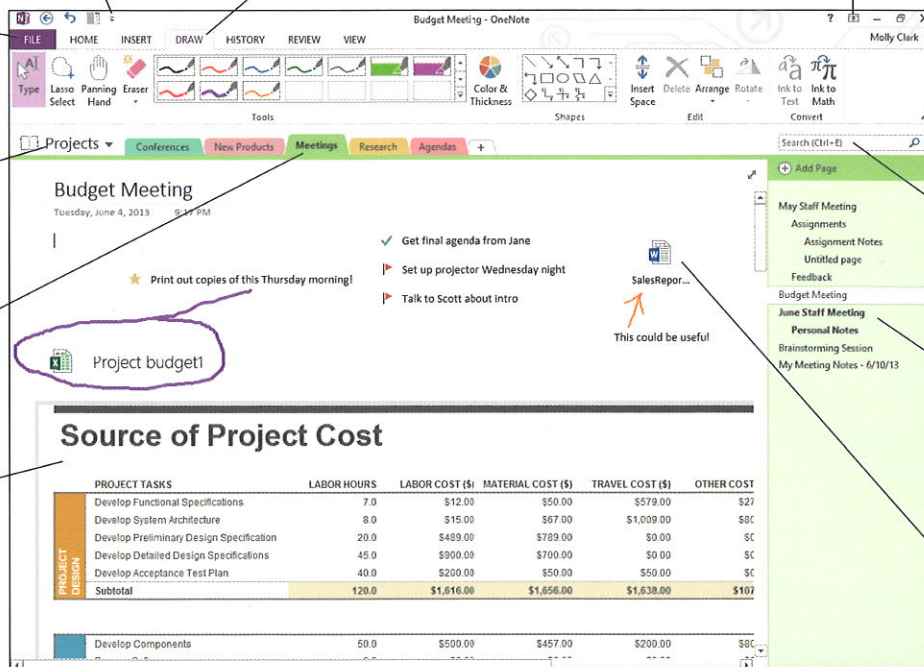
Ribbon Visibility: Click to collapse the ribbon if you want to focus solely on your note page. The ribbon reappears when you click the tabs, which remain visible.

Search: Find your search term in any section, page, screen clipping, or file. Each letter you type narrows the results.

Pages and Subpages: Divide your sections into pages, subpages, and sub-subpages. Rearrange pages or change them to subpages by dragging and dropping.

Attachments: Attach relevant documents to your notes.

Understanding the Ribbon

The fully customizable ribbon contains all the features you need to create, edit, and arrange your notes. With logically organized tabs and groups, you can quickly find any tool you're looking for. Whether you prefer to collapse it to keep it out of the way or expand it so it stays visible, the ribbon is always there when you need it.

Using Keyboard Shortcuts

| Description	Shortcut	Description	Shortcut	Description	Shortcut
Create a new section	Ctrl+T	Dock or undock	Ctrl+Alt+D	Insert hyperlink	Ctrl+K
Add a new page	Ctrl+N	Open a Quick Note	Ctrl+Shift+M	Start math equation	Alt+=
Add a new subpage	Ctrl+Shift+Alt+N	Highlight text	Ctrl+Shift+H	Apply or clear tag	Ctrl+1
Go to next section	Ctrl+Tab	Insert date and time	Alt+Shift+F	Enable full-page view	F11
Go to next note container	Alt+Down Arrow	Insert file	Alt+N+F	Expand or collapse tags	Ctrl+Shift+*
Go to previous section	Ctrl+Shift+Tab	Insert printout	Alt+N+O	Send page by email	Ctrl+Shift+E

Creating a New Notebook

Chances are, you wear a lot of hats. Keep track of them all by creating a notebook for each one. For example, you might make one notebook for a project you manage and another for upcoming trips. Notebooks are further divided into sections and pages for more in-depth organization.

To create a new notebook:

1. Click the notebook title.
2. Click **Add Notebook**. Microsoft Office Backstage view opens.
3. Select a place to save your notebook. (If you save it in the cloud, you can open it from anywhere and share it with anyone.)
4. Under Notebook Name, type a name for the notebook.
5. Click **Create Notebook**.
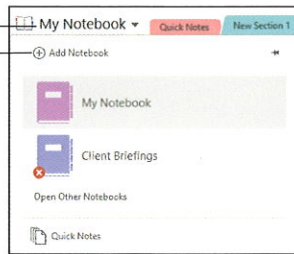
Organizing Your Notebook

Put related notes together by organizing your notebook into sections, pages, subpages, and even sub-subpages. With the organization options in OneNote 2013, your notes will be right where they should be.

Adding Sections to a Notebook

You can divide your notebook into sections to group related pages of notes. Create as many sections as you need and name them according to topic.

Click the **New Section** tab to add another section. Then type the section name in the space.
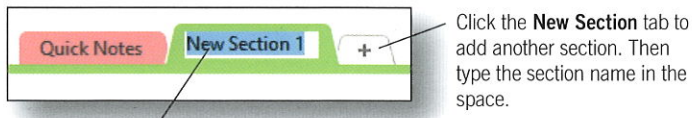
Right-click the tab to rename or delete the section.

Merging Two Sections

Sometimes you need to streamline and consolidate your notes by combining the content of two separate sections. You can do this with a few simple clicks—no tedious cutting and pasting required.

To merge two sections:

1. Right-click one of the section tabs.
2. Select **Merge into Another Section**.
3. In the Merge Section dialog box, select the other section.
4. Click **Merge**.
5. Click **Merge Sections** to confirm.

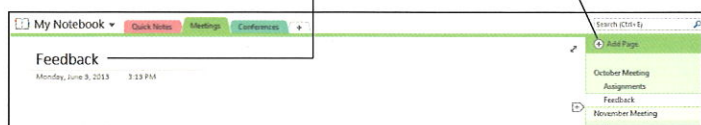**Note:** Once you have merged two sections, you cannot undo the merge.
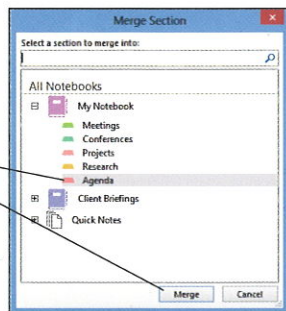
Adding Pages to a Section

Notebook sections are divided into pages, which are shown in a list on the right side of the page for quick reference and easy organization.

Type the page name in the space provided. The name appears on the page list.

Click **Add Page** to add a page to the bottom of the list.

Right-click a page name to rename it, delete it, make it a subpage, and more.

Creating and Displaying Subpages

Perhaps you have a page for a meeting agenda and other pages for notes and feedback about that meeting. Turn the other pages into subpages, and now you have an organized, hierarchical list.

To place a subpage:

1. On the page list, point to where you want to insert the subpage.
2. Click the **Add** icon.
3. Type a name for your new page.
4. To make the new page a subpage, click and drag it to the right to indent it. To make it a sub-subpage, drag it farther to indent it another level. To promote the page in the list hierarchy, drag it back to the left.
5. Drag any page up or down to reorder the list.

Click the **up** arrow to collapse all subpages.
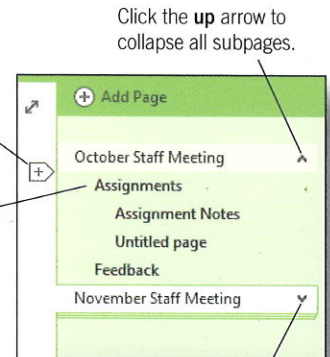
Click the **down** arrow to expand all subpages.

Making a Note in a Notebook

To make a new note, click anywhere on the current page and begin typing. The note appears in a note container.

Click and drag the top bar to move the note to a new spot on the page.

Click and drag the arrow to rearrange the order of note items.
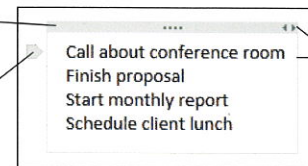
To resize the note, click and drag the resize arrows or the right border of the note.

Sketching and Writing in Your Notes

Do you feel more comfortable scribbling your thoughts with a stylus than typing them out? Do you like to sketch diagrams freehand, using your finger on a touch device? With the drawing features in OneNote, you can capture your ideas just the way you envision them.

Click (or tap) the **DRAW** tab. Then, in the Tools group, select an ink color and line thickness.

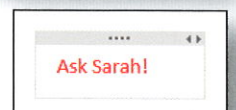Using a stylus, your finger, or the mouse, write anywhere on the page.

Click **Color & Thickness** for even more options.
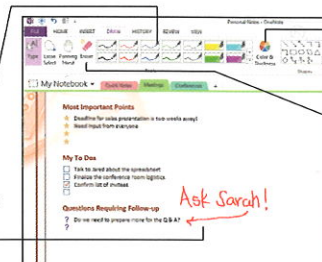
Click the **Eraser button arrow** to select an eraser size. Erase whole strokes at once or just small portions.

Converting Handwriting to Text

Are you worried about the legibility of your notes after you've left your chicken scratch all over a shared notebook? Never fear! You can convert handwriting to text with the click of a button.

To convert handwriting to text:

1. Using the Draw tools, write on a note page.
2. On the **DRAW** tab, in the Convert group, click **Ink to Text**.
3. All handwriting is converted to text. The ink colors remain unchanged.

THINK INK: Personalize your notes by doodling, sketching, scribbling, coloring, and erasing to your heart's content.

Formatting Your Notes

Give your notes some structure by using the formatting tools available in OneNote. With headings, bullets, templates, and more, you can turn a flurry of text into an attractive, easy-to-read page of notes.

Using Styles to Add Structure

A page of text is easier to read when it is divided into recognizable sections. You can quickly add styles to your titles, headings, and subheadings to lend your notes a consistent look across pages and sections.

To assign a style to a single line or a block of text:

1. Click within the text that you want to format with a style.
2. On the **HOME** tab, in the Styles group, click the **More** button.
3. Select a style to apply to your text.

Note: The selected style now appears in the Styles gallery, so you can quickly apply it again without clicking the **More** button.
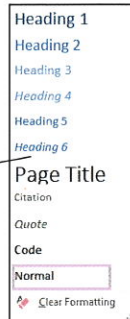
Creating a Bulleted List

Have you thought up a haphazard list of supplies you need to order? Make a tidy bulleted list so that no item is overlooked.

To create a bulleted list:

1. On the **HOME** tab, in the Basic Text group, click **Bullets**.
2. Next to the bullet that appears, type the first line of your list.
3. Press **Enter** to create the next bulleted item.
4. Press **Tab** to indent the bulleted item and make a new level. Press SHIFT + Tab to remove the indentation.
5. Repeat steps 2 through 4 as necessary.
6. Press **Enter** twice to end the list.
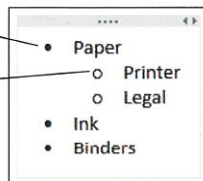
Merging Notes on a Page

Every note you make is housed in its own note container. If you decide two of your notes would work better as one, you can easily merge them.

To merge the contents of two note containers:

1. Hover over the top bar of one of the notes.
2. Hold **Shift** as you click and drag the note until it appears inside the other container.
3. Release the mouse button and then the **Shift** key to merge the notes.

Using Templates

Don't have the time to create notes that look consistent and attractive? Templates are for you! When you use a ready-made template, all you have to do is fill in the details.

To apply a OneNote template to a page:

1. On the **INSERT** tab, in the Pages group, click the **Page Templates button**.
2. On the Templates list at the right of your window, click a category to view its available templates.
3. Click a template name to apply it.

Note: To set a template as the default for all new pages in your current section, at the bottom of the Templates list, use the menu under "Always use a specific template."
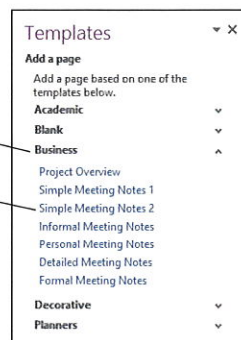
Creating a Table as You Go

Using a table is a great way to clearly display a set of related data, such as a deadline schedule for dependent projects. In OneNote you can quickly create a table as you enter data, determining the number of rows and columns as you go.

To make a table:

1. Type the title for the first column heading.
2. Press **Tab**. Your table will start to appear.
3. Type the heading for the next column and press **Tab** again. Continue until all column headings are created.
4. Press **Enter** to begin the first data row.
5. Press **Tab** to move to the next column.
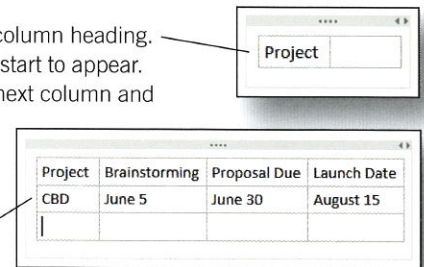
Embedding an Excel or Visio File [New]

Do you want to include a relevant Excel spreadsheet or Visio diagram in your notes? Now you can do more than just attach the file or include a link. You can embed the file so all the data appears right there on your note page. Any time the embedded file is updated, the changes are reflected on the preview in OneNote.

To embed a spreadsheet in your notes:

1. On the **INSERT** tab, in the Files group, click **Spreadsheet**. **Note:** If you have Visio installed, click **Diagram** to embed a Visio file.
2. Select **Existing Excel Spreadsheet**.
3. Browse to the spreadsheet, select it, and click **Insert**.
4. In the Insert File dialog box, select **Insert Spreadsheet**.
5. The spreadsheet appears. Double-click the file name to open the file in Excel.
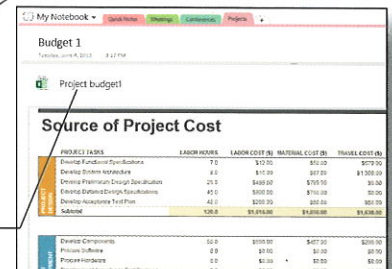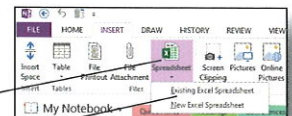
Creating an Excel Spreadsheet in OneNote [New]

Now you can begin creating an Excel spreadsheet without leaving OneNote. When you have the spreadsheet set up how you want it, OneNote opens an Excel window so you can use the rich tools and features there to edit your spreadsheet.

To create a spreadsheet in OneNote:

1. On the **INSERT** tab, in the Files group, click **Spreadsheet**.
2. Select **New Excel Spreadsheet**.
3. Click the **Edit** icon in the upper-left corner of the spreadsheet.
4. The spreadsheet opens in an Excel window. Begin adding data and editing using Excel tools. **Note:** This spreadsheet is your source file for OneNote, so remember to save your work!
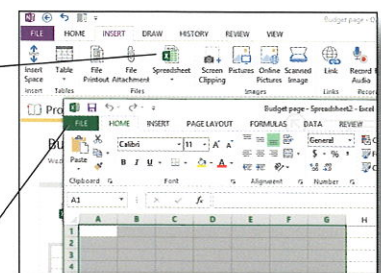
UP TO DATE: Learn how embedding a spreadsheet in your notes keeps you apprised of data changes.
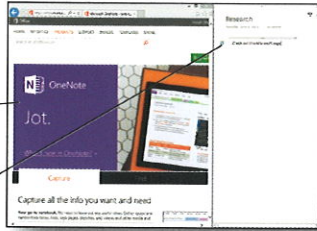
Docking to the Desktop

When you're doing market research online, you don't want to switch between the website and OneNote every time you take a note. Dock your notebook to the desktop to keep it open right next to the program you're using. When you make a note, OneNote automatically creates a hyperlink to the source so you can return to it at any time.

To dock to the desktop from OneNote, on the **Views** tab, click **Dock to Desktop** .

Browse websites or work on documents while OneNote stays open on the side.

Take notes in the docked OneNote window. A hyperlink appears next to the notes, so you can quickly return to the source of the information.

GO BACK TO THE SOURCE: Learn how to take linked notes with your notebook docked to the desktop.

Using the Send To OneNote Tool `New`

When you find a document or a webpage that you want to include in your notes, you can use the Send To OneNote tool to quickly add it to your notebook. Simply press ⊞+N (or click the **Send To OneNote** button in the notification area of the taskbar) to clip part of the screen, send a screen shot or document to OneNote, or make a Quick Note.
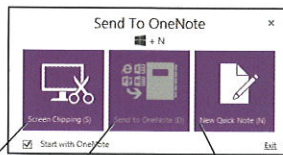
Sending a Screen Clipping to OneNote

You can quickly copy anything you see on your screen and paste it in your notes.

To send a screen clipping to OneNote:

1. Press ⊞+N and click **Screen Clipping**.
2. When the screen dims, click and drag across the area you want to clip, and then release the mouse button.
3. Select a notebook section and click **Send to Selected Location**.

The clipping appears in your notes with a link to its source.

Using Quick Notes

Do you have multiple sticky notes stuck around your computer screen or office? With OneNote you can make electronic Quick Notes that never fall off or get lost. Although you can keep your note visible on your screen, it's also saved in your Quick Notes section for easy access later.

To make a new Quick Note:

1. Press ⊞+N and click **New Quick Note**. A Quick Note window opens.
2. Type your note, then move it wherever you want on your screen.
3. To make your note always visible, click ⋯ at the top of the note. On the **VIEW** tab, in the Window group, click **Always on Top**. Now the note stays visible as you use other progams.

MAKE IT STICK: Learn how to create a Quick Note when genius strikes and then file it

Finding Notes Fast

Are you trying to remember where in your notebook you left a certain note? Waste no time racking your brain! The search feature can find key words in videos, images, file names, titles, and more. Search results appear as soon as you begin to type, so you can quickly find the exact item you're looking for.
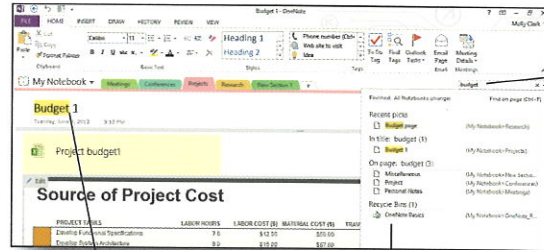
Type a word or phrase in the search box. Search results appear and are narrowed down with each letter you type.

See your search term highlighted wherever it appears, whether in a link, an attachment, a photo, or even handwritten text.

Read the instant search results that appear under Recent picks, In title, On page, and Recycle Bins. Click a result to go to that page.

SEARCH AND FIND: Watch how the search feature can find your term in photos, file names, graphics, and more.

Sorting Your Notes with Tags

Your notebook can be filled with many types of notes, from questions to lists to random ideas. In this jumble it can be hard to find what you need. Classify your notes by adding a tag, and then search for that tag to see a list of all similar notes.

To tag a note:

1. Click within the note.
2. On the **HOME** tab, in the Tags group, click the **More** button .
3. Select a tag. The tag icon appears to the left of the note.
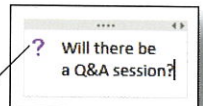
To search for notes with a particular tag:

1. On the **HOME** tab, in the Tags group, click **Find Tags** . The Tags Summary pane appears on the right side of the screen, listing all your tagged notes by their tags.
2. Click an arrow to collapse or expand the list.
3. Click a note to open the page it is on.
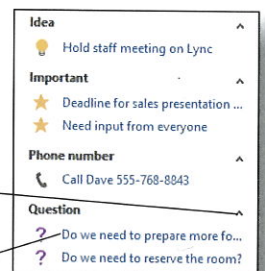
Connecting Your Notes by Wiki

With so many sections and pages of notes, you are bound to find connected items and overlapping ideas in different parts of your notebook. Bridge the gaps by linking these notes together. Then, with a click, you can follow a train of thought from page to page.

To create a link to another part of any of your notebooks, type the name of the page or section, surrounded by double brackets:

See [[budget]] for more detailed information.

The moment you type the final bracket around the name, the word becomes a link to the page or section with that name. If you link to a page that doesn't exist, OneNote will create a new page for you.

See budget for more detailed information.

Attaching Files to a Note

You can attach a file directly to your notes so that you or others can open the file without having to access your computer or network drives.

To attach a file to your notes:

1. On the **INSERT** tab, in the Files group, click **File Attachment** 📎.
2. Browse to and select the file to attach.
3. Click **Insert**.
4. Select **Attach File**. The file appears as an icon in your notes.

Inserting a File as a Printout

You don't have to open a file in its source program to see its contents. Insert the file as a printout so you can see it as an image on your page.

To insert a file as a printout:

1. On the **INSERT** tab, in the Files group, click **File Printout** 📄.
2. Browse to and select the file you want to insert.
3. Click **Insert**. OneNote opens the file and inserts it.
4. You can type or draw over the printout, making notes as needed.
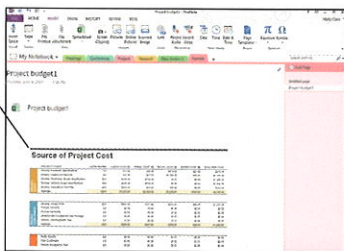
Note: You can send a printout to OneNote from within other Microsoft Office programs. To do so, follow the steps to print the file, but before you click **Print**, under Printer, select **Send to OneNote 2013**.

Inserting Math Equations

Do you ever need to add equations to your notes? OneNote has you covered with a variety of equations, symbols, and structures to make noting calculations a breeze.

To insert equations in your notes, open the **INSERT** tab, and then click Equation 𝜋 to display the EQUATION TOOLS CONTEXTUAL tab.
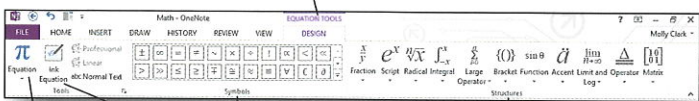
Click **Equation** to select and insert a ready-made equation.

Click **Ink Equation** to write your own math using a stylus. When you click **Insert**, the equation turns to text.

Select items from the Symbols and Structures galleries to build your own equations.

Enjoying Anywhere Access to Your Notes *New*

With OneNote 2013, you can store your notebooks on Microsoft OneDrive®, which means they're always accessible, wherever you go and whatever device you use.

To store a notebook on OneDrive:

1. Click **FILE**, then select **Share**.
2. If OneDrive does not appear as an option, click **Add a Place**.
3. Select **OneDrive**.
4. Type your Microsoft account user name and password.
5. Select your **OneDrive**, type a notebook name, and click **Move Notebook**.
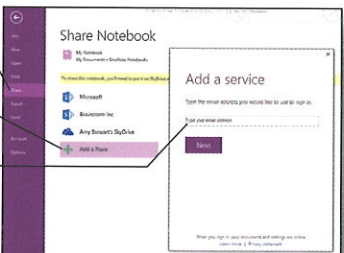
Sharing Your Notes

Storing your notes in the cloud makes them not just easy to access but also easy to share with others. You can even collaborate with others in real time. To eliminate any confusion when multiple authors work simultaneously, OneNote keeps track of all the changes that are made and which person made them.

### Sharing a Notebook on OneDrive *New*

When your notebook is stored on OneDrive, sharing it with others is as easy as sending them an email invitation. You control whether they can edit the notebook or only view it.

To share your notebook, click the **FILE** tab and then click **Share**.

Write a brief message to the invitees.

Click to require invitees to sign in.

Click **Share** to send your email invitation.
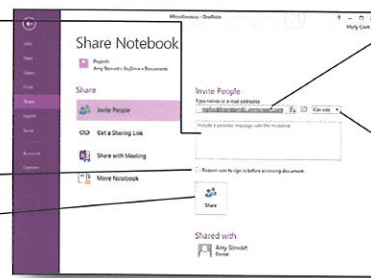
Enter the email addresses of the people you want to share with.

Select **Can edit** or **Can view** to grant editing or viewing permissions.

Keeping Track of Changes

When several people work on the same notebook, you might think it would be difficult to keep track of which content is new and which author added it. Never fear! OneNote makes things easy on you by highlighting all new content and showing the author's initials.
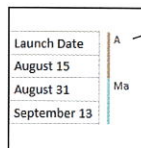
Author initials appear next to new text. To turn initials on or off, on the **HISTORY** tab, click **Hide Authors** 📄.
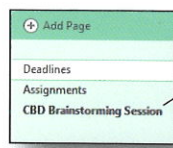
Titles of newly added pages and sections are bold to indicate content that you haven't seen.

Viewing Past Versions of Your Notes

Oops! Did you delete something too soon? Not to worry; OneNote keeps a copy of every version of every page in your notebooks. It's simple to see how the page looked in the past.

To see past versions of your notes:

1. Open the page in question.
2. On the **HISTORY** tab, in the History group, click the **Page Versions button** 🔍. All previous versions appear under the page name on the right.
3. Click one of the versions on the list to display the page.
4. Click the yellow bar at the top to restore or delete that version.

Note: Click the **Page Versions** button arrow to delete versions or disable history for the notebook.

To see past versions of shared notes:

1. On the **HISTORY** tab, in the Authors group, click **Recent Edits** 🔍.
2. Select the time frame you want to see.
3. The list of edits appears on the right. Click an item to see the changes highlighted on the page.

To see how a shared page has evolved over time, you can view a complete history of all the changes. Lists of edits can be sorted by date or by author.
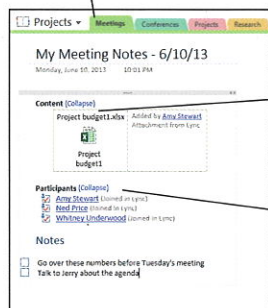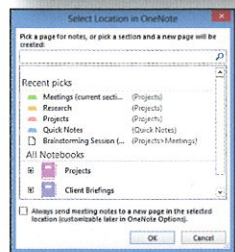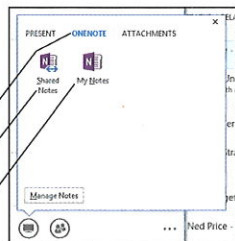
Taking Meeting Notes

Chances are, you take many of your notes while sitting in meetings, whether in person or online. With OneNote you can link your notes to meetings in both Microsoft Lync® and Outlook®, so you don't have to enter details more than once—and you'll always remember which notes belong to which meeting.

Taking Notes in a Lync Online Meeting [New]

Have you ever found yourself participating in an impromptu Lync meeting and wishing you were taking notes? There's an easy way to do it! Just open a new OneNote page from Lync and begin taking and sharing notes without missing a word.

To take notes during a Lync meeting:

1. In the meeting window in Lync 2013, click the **Presentation** button.
2. Click the **ONENOTE** tab.
3. Click **Shared Notes** to open a page in a shared notebook where all meeting participants can take notes together.
   OR
   Click **My Notes** to take private notes.
4. In the dialog box, select a section for the new notes page and click **OK**.
5. Begin typing your notes on the new OneNote page, which opens in the section you specified.

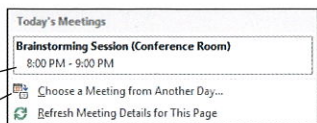Any files uploaded to the Lync meeting are automatically attached to your notes.

The note page automatically lists all conversation participants.

### Taking Notes in a Scheduled Outlook Meeting

You can connect your current page of notes to a scheduled Outlook meeting without ever leaving OneNote.

To connect notes to an Outlook meeting:

1. On the **HOME** tab, in the Meetings group, click **Meeting Details**.
2. Select a meeting from the list of today's meetings, or choose a meeting from another day.
   The meeting details appear right on your note page.
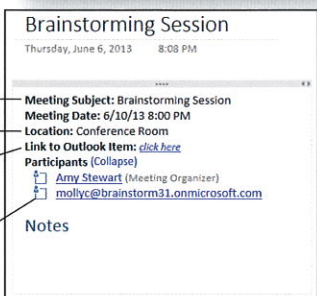
When details such as date, time, and location are updated in Outlook, they are automatically changed in OneNote.

The Link to Outlook Item takes you directly to the meeting in Outlook.

Use the check boxes to record meeting attendance.

Note: To open your meeting notes from within Outlook, open the meeting. Then, on the **MEETING** tab, click **Meeting Notes**.

## Creating an Outlook Task in OneNote

When you make a note about something you need to follow up on, you can turn it into an Outlook task without leaving OneNote.

To turn a note into an Outlook task:

1. Select the note.
2. Click the small gray arrow that appears to the left of the note.
3. On the mini toolbar, click the **Outlook Tasks** button.
4. Select the day or the week to assign the task to. The task is automatically created and saved in Outlook.
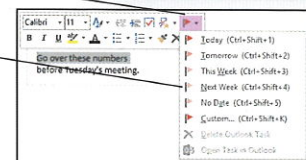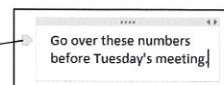
Note: Click the task flag in OneNote to mark the task as complete in both OneNote and Outlook. If you mark a task complete in Outlook, its status will change in OneNote.
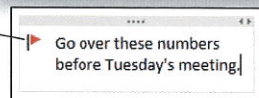
Protecting Your Notes with a Password

Do you have a section in a shared notebook that you would rather keep private? You can easily assign a password to keep your information safe.

To protect a section of your notes by using a password:

1. Right-click the section tab and select **Password Protect This Section**.
2. In the Password Protection pane, click the **Set Password** button.
3. Type a password and confirm it and then click **OK**.
4. When you open a password-protected section, it stays open for a while. To lock it again, click **Lock All** in the Password Protection pane.