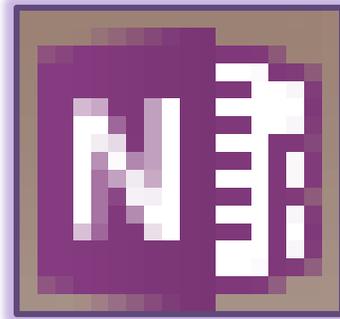


# Take Note!

## Microsoft's OneNote®

### *Notebooks and Scrapbooks for the Digital Age*



Prepared especially for You!

Presented and Written by:

**Greg Creech**

Techedutainment Services Inc.  
*Technology* □ *Education* □ *Entertainment*

*Hey! It's Chic 2B Geek© Series!*

Microsoft's OneNote - Notebooks for the Digital Age  
Versions 2010 and 2013



## Table of Contents

**TABLE OF CONTENTS**..... 2

**OOPS! AND LEGAL STUFF**..... 4

**INTRODUCING GREG CREECH**..... 5

**TAKE NOTE! ONENOTE – THE SUPER DUPER DIGITAL NOTEBOOK**..... 6

Why OneNote? ..... 6

Now, for a little history of the evolution of OneNote. .... 7

**THERE’S AN APP FOR THAT! YES, BUT. . .** ..... 7

**FILE TAB – 2010 VERSION**..... 8

Info ..... 8

Open..... 8

Save As ..... 8

Print..... 8

**FILE TAB – 2013 VERSION**..... 9

**CREATE YOUR NOTEBOOK**..... 10

**OPTIONS!**..... 12

General Pane ..... 12

Display..... 12

Send to OneNote ..... 12

Audio & Video ..... 12

Advanced..... 13

**HOME TAB**..... 14




---

Tag – you are it! Tags - Great ways to organize! .....	15
<b>OUTLOOK AND ONENOTE.....</b>	<b>17</b>
<b>PRINTING AND ONENOTE.....</b>	<b>19</b>
<b>NEW PAGES AND TEMPLATES.....</b>	<b>20</b>
Create your own template.....	20
Page Templates Command Button – Insert Tab .....	20
<b>ONENOTE 2010: DON’T HESITATE – NAVIGATE: THE NAVIGATION PANE.....</b>	<b>22</b>
<b>INSERT TAB .....</b>	<b>23</b>
<b>THE SHARE TAB (2010 VERSION) – IT’S POLITE TO SHARE.....</b>	<b>28</b>
<b>THE HISTORY TAB – 2013 VERSION .....</b>	<b>28</b>
<b>THE DRAW TAB - QUICK DRAW, MCGRAW! .....</b>	<b>29</b>
<b>REVIEW AND PASSWORD PROTECTION.....</b>	<b>30</b>
Review Tab – 2010 and 2013 Versions .....	30
Password Protection for Sections .....	31
<b>VIEW TAB.....</b>	<b>32</b>
<b>IN THE END . . . .....</b>	<b>33</b>



## Oops! and Legal Stuff

While I have made every effort to ensure the accuracy of this document, including grammar and instructions, I make mistakes. (*Surprise!*) If you find an error or want to provide constructive feedback, please contact me. Thank you! *Enjoy Microsoft's OneNote and this document.*

Greg Creech

Techedutainment Services, Inc.

P. O. Box 1431

Pine Lake, GA 30072

[www.gregcreech.com](http://www.gregcreech.com)

- ✓ International Association of Administrative Professionals Business Partner and Member
- ✓ Association of Talent Development (formerly ASTD) Member
- ✓ Society of Human Resources Management Member
- ✓ Microsoft Office User Specialist Certification – Master Expert and Instructor
- ✓ A+ Certified Systems Technician through CompTIA
- ✓ Microsoft Certified Technical Trainer
- ✓ CompTIA Certified Technical Trainer +
- ✓ 2007 Southern Region University Continuing Education Association Award Winner for the Top Non-Credit Programs
- ✓ 2009 Southern Region Association of Continuing Higher Education's Faculty Award winner for my work at Emory University's Center for Lifelong Learning
- ✓ Former National Speakers Association Member

*OneNote* ® is a most excellent product from *Microsoft* ® Corporation and is part of the *Office* ® Suite of products and services.

Copyright © 2015 Greg Creech, Techedutainment Services, Inc. All rights reserved. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without express written permission of Greg Creech, P. O. Box 1431, Pine Lake, GA 30072-1431, [www.gregcreech.com](http://www.gregcreech.com).



## Introducing Greg Creech

*Shop Talk from The Atlanta Journal-Constitution*

**Sunday, Oct. 29, 2000 R3 - JOBS**

### *Why I Love my Job – Greg Creech*

**What I Do:** I teach technology courses and make presentations to beginner and expert computer users and professionals. I use humor and the piano. I train all levels from first-time computer users to systems technicians acquiring A+ certification. As an A+ certified trainer, MOUS expert, and technical trainer, my certifications and knowledge give me a career in the technology. My humor, the piano, and people keep me in the technology training field. I sing to my students sometimes and perform stand-up comedy about computers.

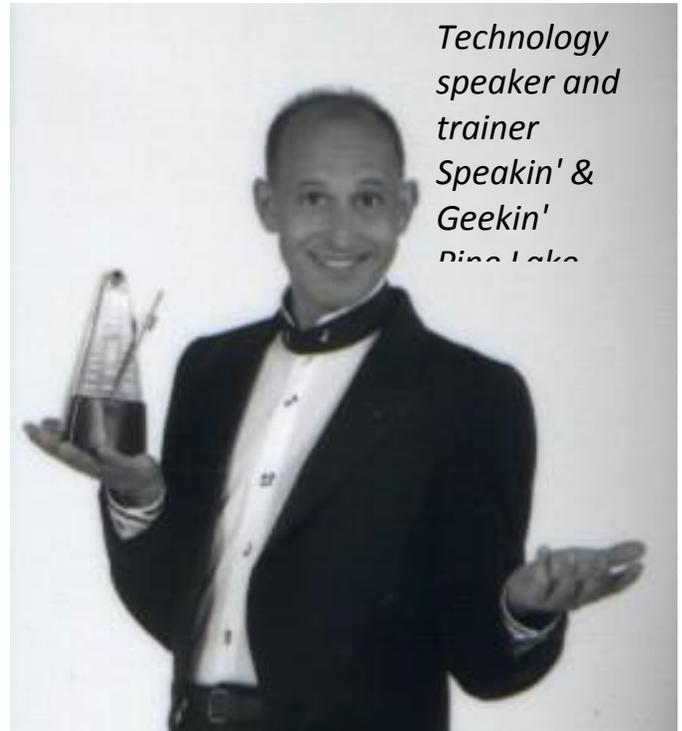
**How I got started:** I won Best Actor in a Supporting Role at Southside Theatre Guild for "A Funny Thing Happened on the Way to the Forum" and studied comedy under Jerry Farber. I have played the piano since 8 years of age and had the first personal computer with a 1 MB of memory. In order to learn the PC, I associated the PC with the piano -- both use a language to translate, both have keyboards, and now - both provide music and information. I must admit I miss the days when I only played the piano and programmed the PC. Now, I play the PC and have to program my piano. In 1998 after seventeen years of technology business experience in the corporate market, I decided to take a leap of faith on my own. I call my presentations "Showminars," a combination of a show and a seminar.

**The Best Part:** Hearing the laughter and the comments: "You have saved me so much time," and "I remember complicated macros because of the way you taught them." I have a passion for teaching creative people to be more technical and technical people to be more creative – Mozart would be proud!

**The Challenging Part:** Explaining why I want my piano in a PC classroom. "Mainframers" who refuse to acknowledge the existence of the PC and the Web. People who attend training classes because they have to, not because they want to. Technical people who are not client- focused.

**My Favorite Quotes:** "To err is human, to really mess things up you need a computer."  
 "Forty-two percent of all households have a computer; only eight percent of those know how to use it."

**What Keeps me Going:** I enjoy combining my love of people, the piano, processors, and humor into a unique speaking and learning experience.



*Technology speaker and trainer  
 Speakin' & Geekin'  
 Dino Lake*

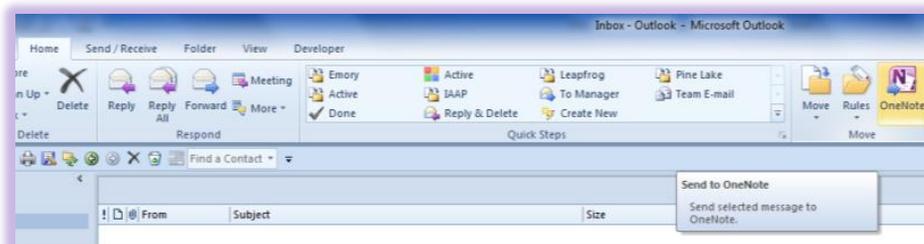
Greg Creech sings to his students, and often he performs stand-up comedy about computers.



## Take Note! OneNote – The Super Duper Digital Notebook

**Why OneNote?** I love Microsoft’s OneNote; this is a digital notebook, scrapbook, and organizer. Just like in school or business where you have an analog notebook filled with handwritten notes and sections/dividers for subjects or like a scrapbook with photos, letters, and other correspondence, OneNote is an organized way to incorporate all digital items in one place and make your notes. OneNote works with many applications and especially Office

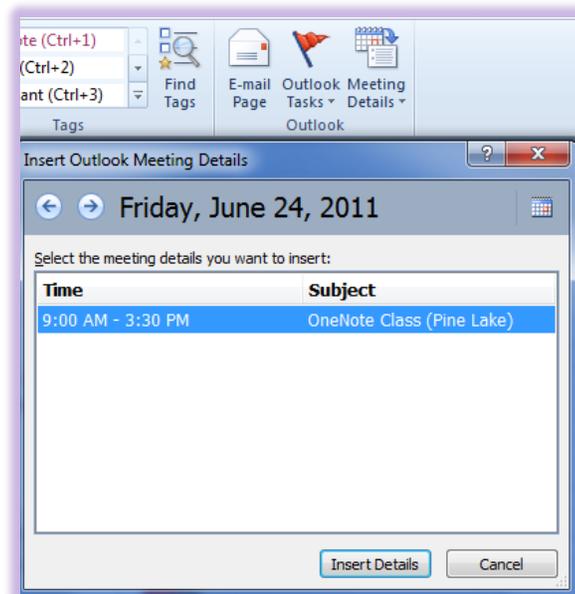
applications and you can copy/paste or attach files in OneNote from Word, Excel, PowerPoint, and Outlook. Outlook provides a link and ability to send



information to OneNote. On the Home Tab for Email, Contacts, and Tasks you will see the OneNote command button. This quickly sends a copy of the email to the folder you select in the subsequent menu.

I use OneNote for education/webinars, event management, conferences and travel arrangements, scrapbooks, and for so many reasons to stay organized and up-to-date no matter where I am or what tablet/computer I use.

OneNote contains linkages to Outlook on the Home Tab for emails and on the Contact, Appointment/Event, and Tasks tabs for these objects. The OneNote command is in the shortcut menu for items you select in Outlook, too. I can view any date on my Outlook Calendar from the Meeting Details button on OneNote’s Outlook Group on the Home Tab. I am viewing a OneNote Class from Outlook using the Meeting Details button and choosing Meeting from Another Day. I can double click the meeting or click the Insert Details button for this to appear in my OneNote Page.



Like the old-fashion paper notebook you create tabs or dividers and you add pages. In upcoming chapters I present an overview of each Tab in the Ribbon and important items to use in each of the Ribbon’s tab in OneNote.



New for 2013!

I'll note new and revised commands and functionality in the 2013 version with the call out displayed at left. I'll base much of the learning on the 2010 version which is still very popular and doesn't have a ton of differences with 2013.

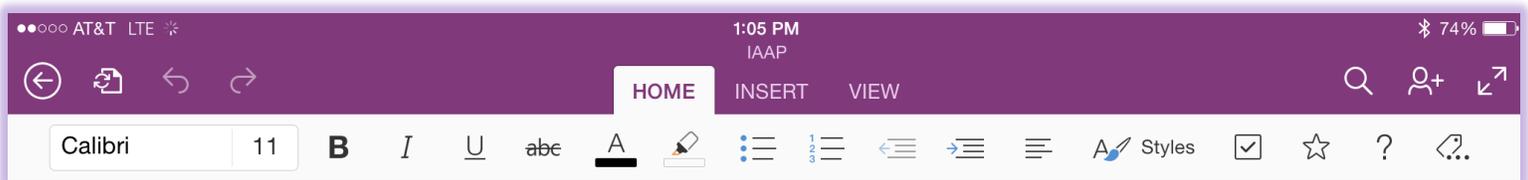
Now, for a little history of the evolution of OneNote. Microsoft has tried this concept of OneNote using an application entitled Binder, but OneNote is superior than Binder and incorporates so many other types of objects, including videos and sound. We'll look at many neat ways of using OneNote and adding sections, pages, and objects to your Notebook.

First as in all Office applications, I add buttons to my own tab in the Ribbon, modify my Quick Access Toolbar with my favorite commands, and show the Quick Access Toolbar below the Ribbon. I cover Office 2010 and 2013 customizing the Ribbon and the Quick Access Toolbar in a PDF download and handout available at [www.gregcreech.com](http://www.gregcreech.com) and [www.gregcreech.biz](http://www.gregcreech.biz).

## There's an app for that! Yes, but. . .

With the evolution of Microsoft Office and its increasing ease of accessibility to the world through smartphones, tablets, etc. the versions may confuse you. Online apps and tablet versions are not as robust as the desktop and full application versions (2010 and 2013) that I will use in this document. However, I do enjoy having my OneNote information available to me no matter where I am or which computer I use. I use my desktop version for videos and extensive edits, and I use my tablets and smartphones for simple, quick edits and viewing information.

Here is a screenshot of the OneNote app on my iPad. While there is a loss of commands, such as video recording and playing, this contains popular and helpful tools, such as Password protection in the View Tab and you may send items, like photos, directly to OneNote from your iPad tablet and the OneNote app. In the Home tab, you'll notice below that there are still items such as formatting buttons and tags; the OneNote app contains to do tags and star tag as commands. I access my OneNote file through Microsoft's OneDrive.

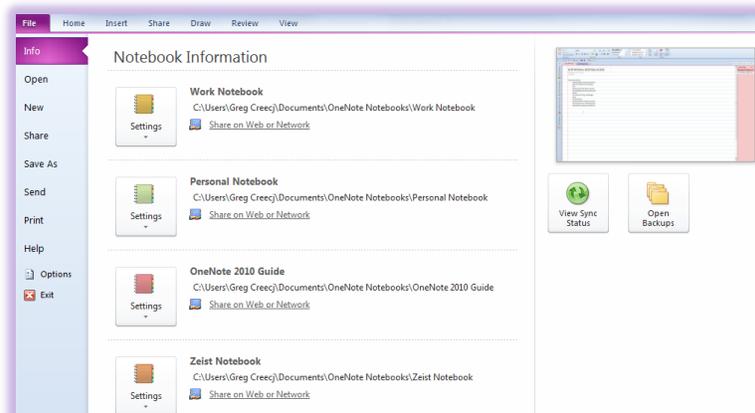




## File Tab – 2010 Version

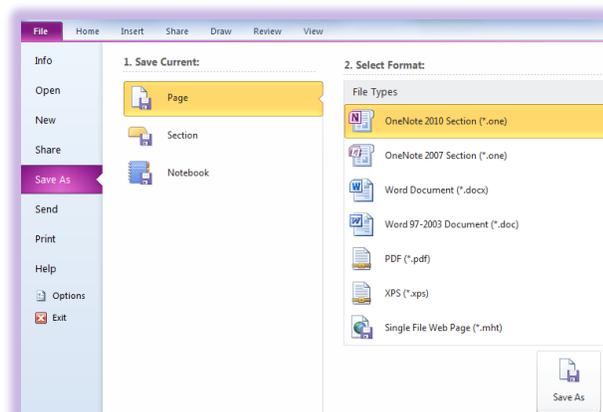
The File Tab offers important options for the Notebook from sharing the Notebook in the Info pane, to Saving the pages and items in different formats, and Printing your Pages and items in your notebook.

**Info** – Provides the ability to set important properties and to sync and share your notebook. The settings allow several options including the location of your notebook and color.

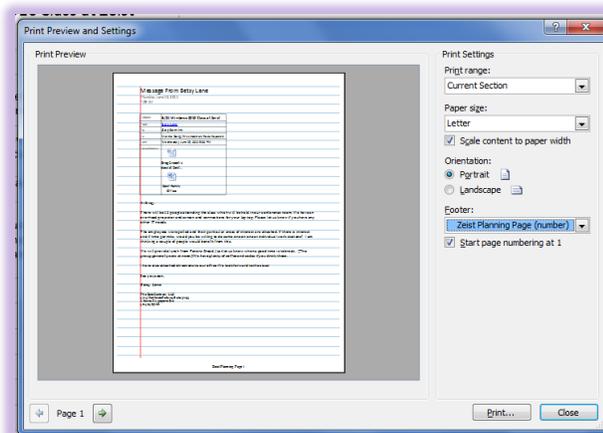


**Open** – Displays menu choices from where you wish to open a notebook and lists your recent opened OneNote Notebooks. You may pin your favorite OneNote notebooks, so they will always be in your list.

**Save As** – Provides a quick way to save your pages, sections, or the entire notebook in various formats.



**Print** – Provides ways to Print your notebook, pages, and sections. When I clicked the Print Preview button on the Print item on the File tab, the menu at right displays for me to choose what I want to prints, and other items. OneNote is not design so much for printing as it is for viewing. You may find printing the files and attachments from the native application better than printing from OneNote.



**Hot Tip!** You can print web pages and files to OneNote using your print menu. Simply select OneNote 2010 or OneNote 2013 as your printer and the information transfers to OneNote and the notebook/section you specify.



## File Tab – 2013 Version

The Save As feature in the 2013 version changes to Export. One of the cool

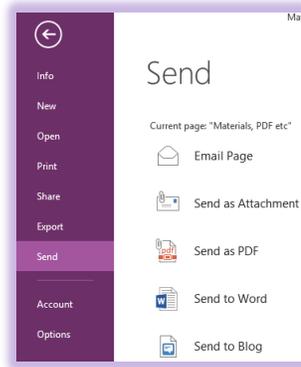
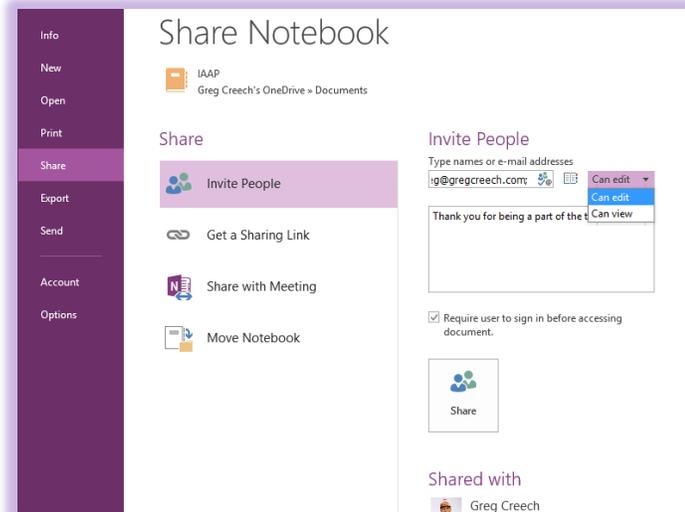
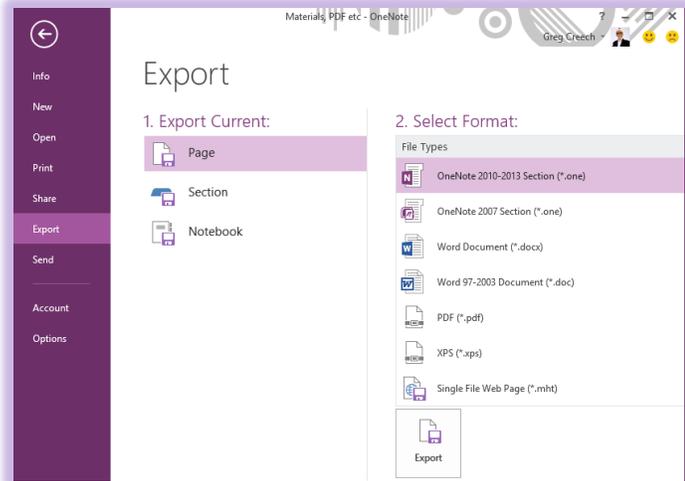
features of OneNote is how well the application incorporates other files, particularly Office files, PDF, and webpages. This functionality works well both with importing

into OneNote or exporting out of OneNote. You may want to export your entire notebook to a new notebook using this feature.

We will learn how to email specific pages of your Notebook and to work with sections, including giving a section password protection.

Also, when you create a new notebook or use the Share menu item, the 2013 version allows you to assign edit or read only capabilities to those that you wish to share your notebook. As displayed at right, I am sharing my notebook and granting edit capabilities; I'm send a personal message as well. You may share your notebook in 2010 but not with this much security and functionality.

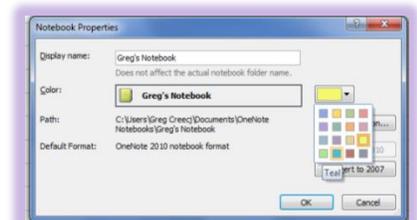
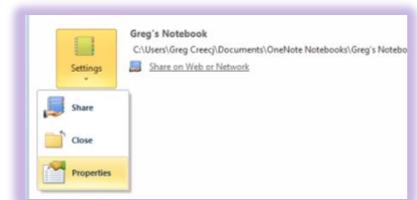
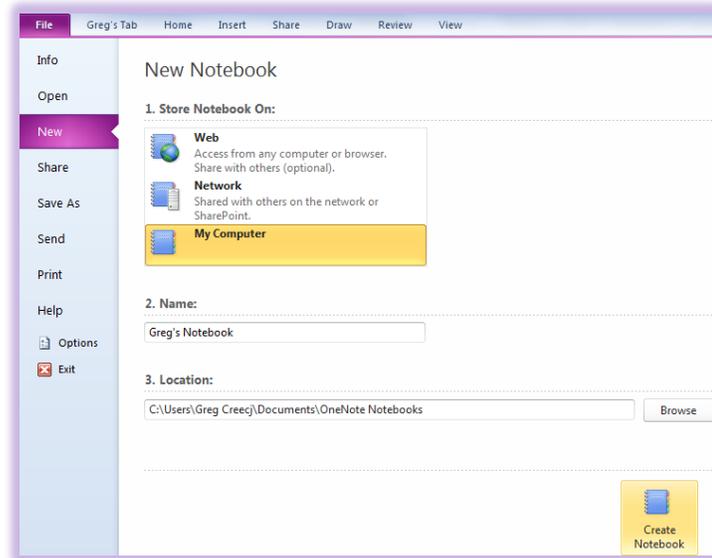
The Send item and menu offers ways of saving and distributing your Notebook page.



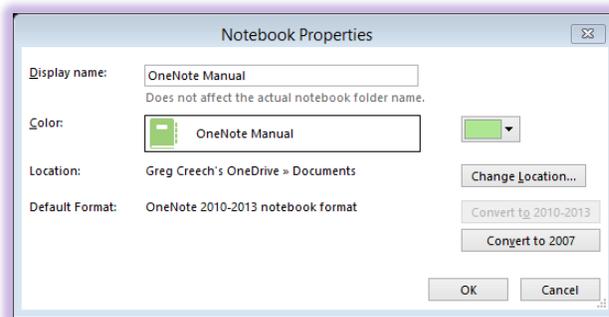


## Create Your Notebook

1. On the File Tab, Click New and decide where you want to store your notebook and the name of the notebook.
2. Click Create Notebook and you have your OneNote notebook ready to go.
3. Notice the Navigation Pane on the left that reveals all of your notebooks. You should review the Personal Workbook, Work, and definitely the OneNote 2010 Guide. All of these notebooks are fantastic and offer many good ideas, suggestions, and neat/cool/nifty information for you in using OneNote. One OneNote suggestion which I like and am using is to create a password and login section of your Personal Notebook and then create a password for this section. My document is simply an overview and way to get started quickly and easily.
4. Now, after creating your notebook, go to the File Tab and in the Info Pane choose your Notebook and Settings. Click Properties.
5. From Properties you may change your display name, convert back to 2007, and (ALL IMPORTANT) change your color. Click OK to save your settings.



The 2013 Notebook Properties pane appears below.

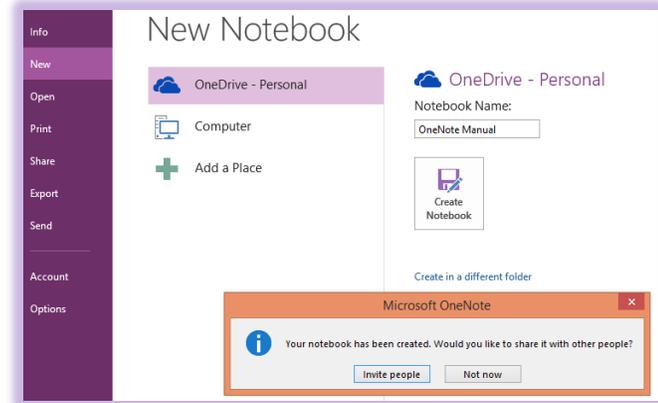




Creating a New Notebook in Office 2013 is a bit different. As displayed here, I am creating my OneNote Manual notebook file on my OneDrive account. After I create the notebook OneNote asks if I want to share the notebook with other people. If you click the Invite people button, the Share pane displays for you to enter an email address and determine if the person should have edit capabilities or view only capabilities.

### On Your Own, Baby! Exercise your Skills -

Create your notebook and set your properties including Name display, location, and color.



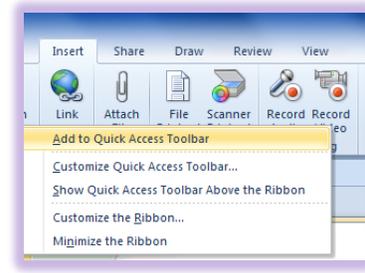
Share your notebook with someone or use the notebook as a scrapbook with a friend or family member. Also, why not use the OneNote notebook for a household inventory and invite family members to have a section for their room. Everyone can contribute to the living/great/family room!

In your Notebook, review your Options and set them for your preferences (for now – you may always change them). Accomplish these tasks:

- ✓ Set your default font and size,
- ✓ Move your Navigation pane and pages to the left of your screen,
- ✓ Change your signature in the Advance section,
- ✓ Determine your section password protection options,

Create your own tab in the ribbon to add command buttons and customize the Quick Access toolbar with your favorite commands. Visit [www.gregcreech.biz](http://www.gregcreech.biz) to download a free manual on Office 2010.

**✍ A Hot Tip: You can add any command that you see on the Ribbon by right clicking the button and choosing Add to Quick Access Toolbar. Do this for the Record Video and Record Audio on the Insert tab as I am accomplishing at right. ✍**



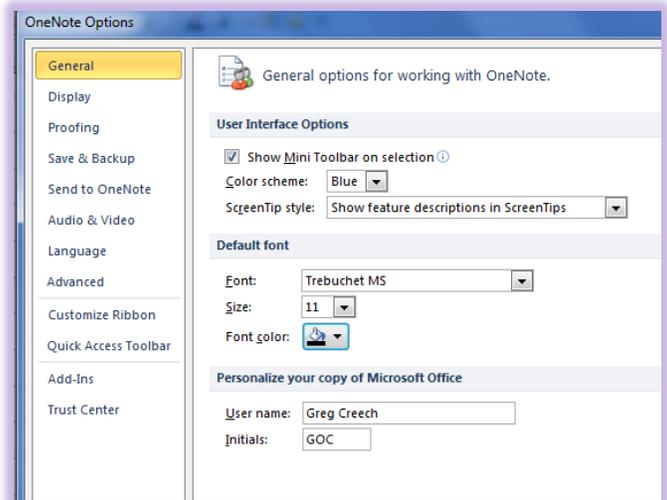
✍ Write your notes here: \_\_\_\_\_



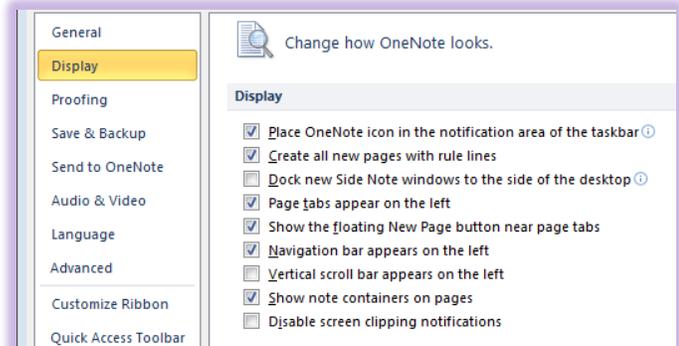
## OPTIONS!

Like all Office Applications and versions, OneNote contains important Options that you should set to guide the entire application. The options are very similar in 2010 and 2013 OneNote. You should review all of these options and panes and determine how you want OneNote to behave and to set important defaults, such as font, signatures, and so on. Here are some of my favorite options to set as I began using OneNote:

**General Pane** – Ensure your name and Initials are in the Username and Initial section – this affects ALL Office applications, so this may have been set in Word, Excel, etc. for you. I change my default font, size and color here. I set my color theme, and other application settings here.

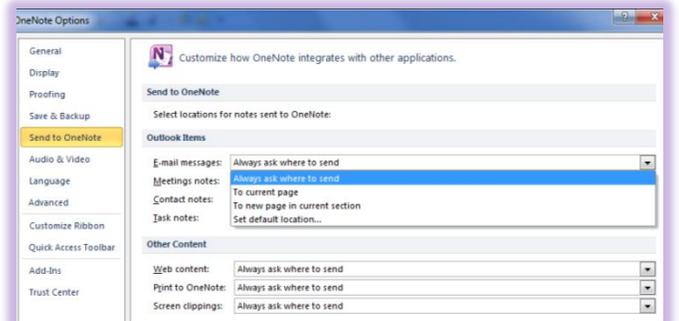


**Display** - I like for my tabs/dividers to be on the left not at the right of the screen and I like my pages with rule lines, but that's me – not you. You should decide what display options are for you and set them here.



The **Proofing** and **Save & Backup** Panes are similar to other Office products and you should review these settings for your preferences. Backup your OneNote files regularly I have set mine for a daily backup.

**Send to OneNote** – I have not changed these defaults since I have several notebooks, computers, and accounts and need OneNote to ask where I want to send these items. However, you may set these defaults if you are working on a few notebooks and they are stored in a consistent location. We will see these options in actions as we share information with other applications, such as Outlook.

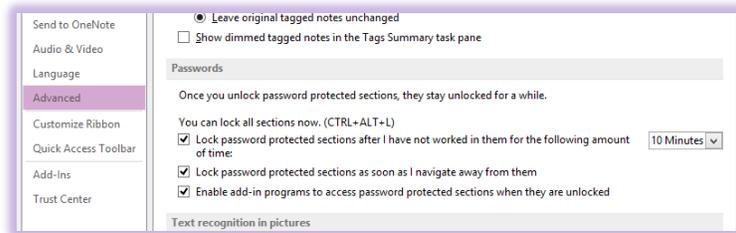
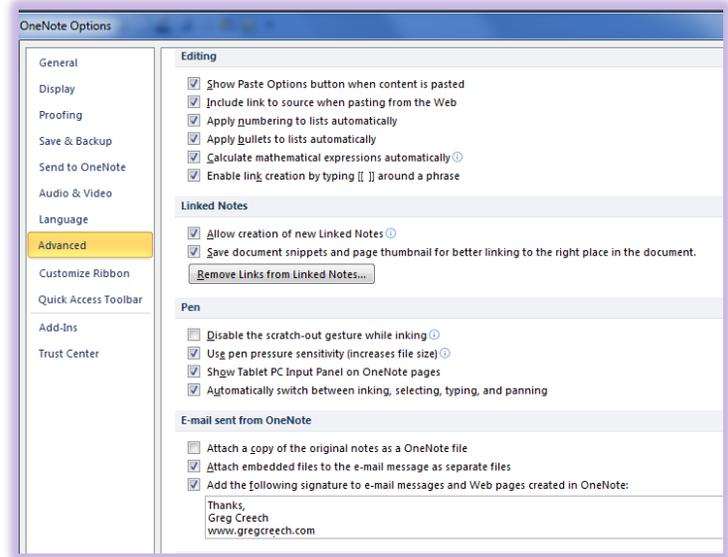


**Audio & Video** and the **Language** settings – Unless you are an Audio & Video geek or have been told to change these settings – I would leave them alone. If you need to change your language, the Language tab is for you.



**Advanced** – There are many advanced options from which you should choose and change for your needs. For example, I change my signature on items I send from OneNote as displayed here. OneNote does not share your Outlook or other email service signature, so please be sure to change your signature as we will send pages as emails messages and this is the signature OneNote uses.

The **Passwords** section of the Advanced pane is very important for you to set the time that a section remains open after giving the section the needed password. This section remains open for others to view, so be careful! I have mine set 10 minutes and when I navigate away from the section I will need to provide a password when I return to the section. We will set a password for a section and review these options again.



The **Customize Ribbon** and **Quick Access Toolbar** panes are important for you to create ease-of-use and to be more productive in using this application and all Office applications. I have another handout for you if you want to know how to create your own tab and customize the Quick Access Toolbar as you will see I have accomplished in the next sections. I created a Greg Tab for my favorite commands, such as Recording Video, Recording Audio, Attaching Files, and good, old Copy/Paste. I have customized my Quick Access Toolbar in a similar fashion and located it below the Ribbon. Using these panes, allows you to quickly add, delete, view/or not view, items on the Ribbon, Tabs, and Quick Access Toolbar. If you want a handout of how to accomplish this in Word, Excel, and Outlook email me at [greg@gregcreech.com](mailto:greg@gregcreech.com) or visit [gregcreech.com](http://gregcreech.com) or [gregcreech.biz](http://gregcreech.biz) for the PDF manuals, ENJOY!

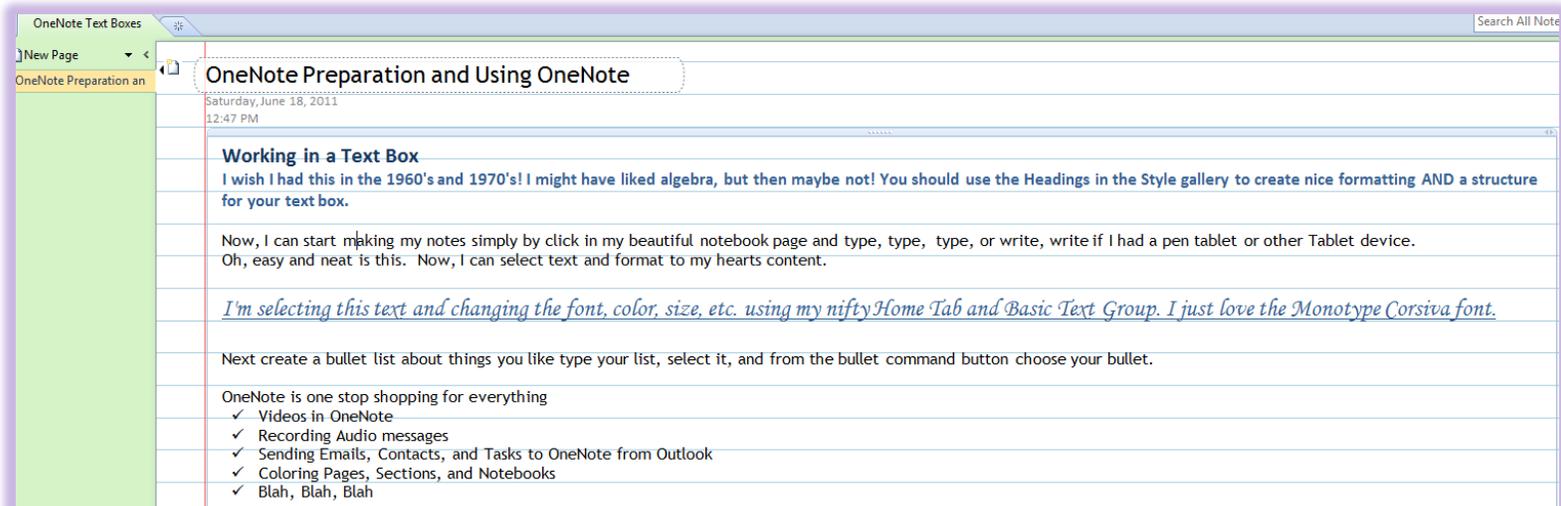
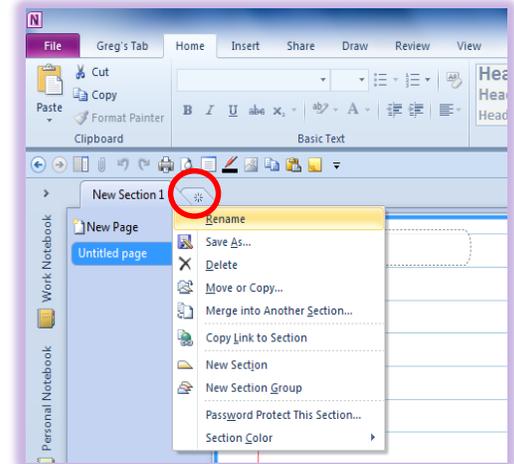


## Home Tab

After creating your Notebook, OneNote creates a New Section Tab for you. I like to right click on the New Section tab and from here Rename my Section, Change the Color, and if I have sensitive information provide a password for this section. This shortcut menu is very helpful, especially to create new sections, save as, delete, and so on. **The only difference this shortcut menu in Office 2013 is the name Save As changes to Export.**

**➤ A Hot Tip! Quickly add a New Section by clicking the last tab with the asterisk (\*) as circled above. When you click this tab a new section creates for you. In 2013 OneNote, a plus (+) sign replaces the asterisk (\*) to insert a new section.**

After you rename and color your section. Type in the text box provided to name your page from Untitled Page to a new name. I have created a Page name OneNote Preparation and Using OneNote and when and wherever you click in your page OneNote quickly AND easily supplies a text box ready for you to type and format as displayed below.



Click in your OneNote page and with the text box enter text as described above in the screen shot. Play around with the Basic Text Group for change your fonts, using bullets and numbers, and particularly Styles. The Heading 1, Heading 2, etc. not only provide lovely formatting but also creates a structure and outline for your information – two neat features in one style. These formatting commands are similar to other Office applications and the Home Tab.



## Tag – you are it! Tags - Great ways to organize!

Tags help in your search and find feature as well as organizes your information so you should use tags to help keep organized, especially for huge notebooks. Tags are terrific for creating To Do lists, reminders, and to aid in navigating a huge notebook. While there are plenty of available tags, you may tailor a tag for your needs and purposes.

Here's how I have created my own tag for OneNote.

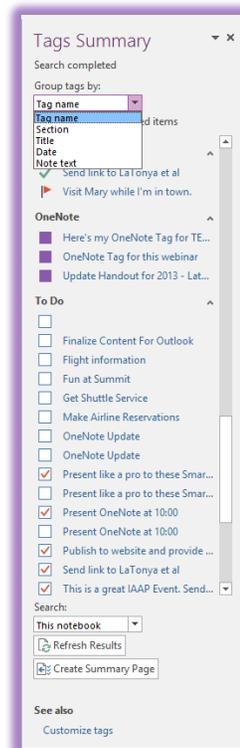
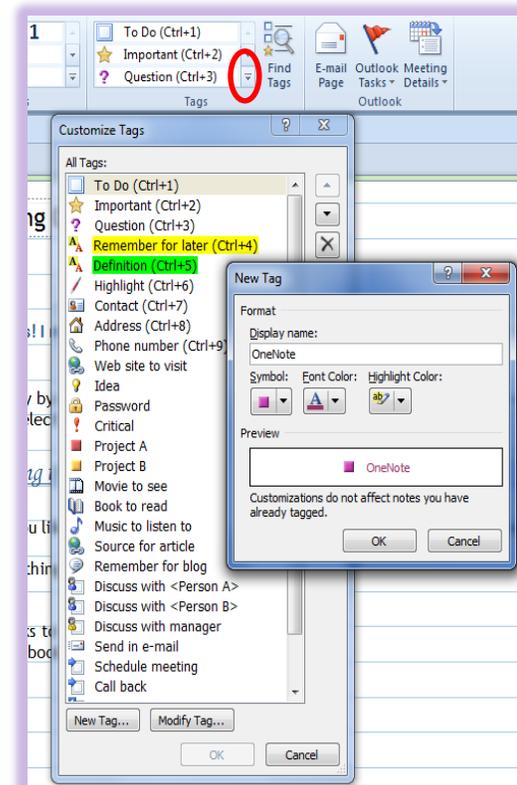
From my Tags list I choose Customize Tags at the bottom of the list – I have circled the Tag List arrow at right. From the Customize Tags, I choose New Tag and from the New Tag pane gave a name of OneNote and a purple Font Color . I assigned a symbol to my Tag as well. After accomplishing this I clicked OK.

Now, I can be at any place on my page to give a tag. I click the tag I want in this case OneNote and a text box appears with my symbol and I type the tag or text I want. OneNote memorizes this for me to use as a search and find feature. I can assign this tag to any section and page.

Next, when I'm ready to use my tags I click the Find Tags button on the Home tab and my Tags Summary pane appears ready for me to group, sort, and view my tags and organization in many ways. For example, I am grouping my tags by name and displayed at right shows my 2013 OneNote tagged items. If I click on a tag in this pane, OneNote navigates to that page and tag for me. Notice I have plenty of To Do's to do! You can restrict your search to only items that are unchecked.

At the bottom of this extensive pane, I am searching the entire workbook and I can create a terrific summary page of all of my tags as I have them grouped. I like to group by sections, dates, and tag names.

So, use tags early and often to stay organize, especially To Do tags to keep you on track and to document your work and achievements.





### On Your Own, Baby! Exercise your Skills -

In your Notebook, create a new section, rename and recolor your section.

Next with the New Untitled page. Name your page by typing in the text box and create tags for your page. Use your template if you like

Accomplish these items on your page:

- ✓ Create various text boxes, type in information.
- ✓ Create a text box and copy and paste select items from other applications, i.e. Word.
- ✓ Format your information using the Basic Text group and create titles and headings and format them using Heading 1, Heading 2, etc.
- ✓ Create a bullet list
- ✓ Create a number list
- ✓ Create new tag with a symbol and font color,
- ✓ Assign your tag to new pages and other items in your notebook
- ✓ Create a to do tag list
- ✓ View your tags and find them
- ✓ Create a summary page of your tags by section

♪ *Write your notes here:* \_\_\_\_\_  
\_\_\_\_\_

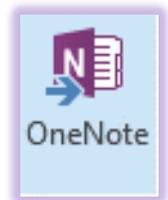


## Outlook and OneNote

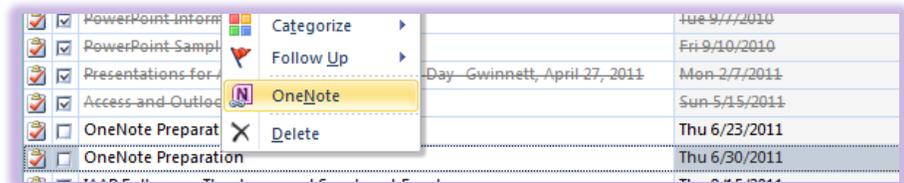
One of the best features of OneNote is how well it works with other applications, especially the Microsoft Office Suite, as we will learn. Since Outlook and OneNote have commonalities, such as needs for time sensitive and calendar information, important email tracking, and tasks/to do lists, having them share rather than duplicate information is the answer. While you may duplicate an email and other items from Outlook into OneNote easily, OneNote shares your calendar, contact, and tasks. The detail/notes section of Contacts, Calendar, and Tasks may display in OneNote but Outlook controls the actual contacts, calendar, tasks, and items. You will find that using OneNote rather than Outlook as a means of communication and accessibility to information easier and more robust for a manager or small team of people.

### Hot Tip – Ease of sending an email to create an OneNote Page!

1. You should be in Outlook and select an email.
2. From the Home Tab click the OneNote button. OneNote prompts about where to put the email message. The 2013 Send to OneNote button appears at right.
3. After selecting the notebook and section, click OK.
4. OneNote creates a page with your email message.



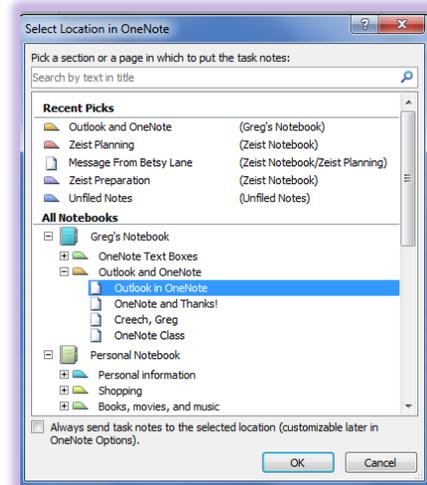
Outlook provides the OneNote command button on the Home tab for emails and the button is on your Contact, Appointment, Event, and Tasks tabs as you are creating/editing these items. You may always right click a selected item and choose OneNote from your shortcut menu as displayed here.



If this is the first time you are sending this item to OneNote, OneNote prompts you about the location such as Notebook, Section, and Page to place the Outlook item.

### Hot Tip – We learned this option earlier. If you want a default notebook and to modify your options for sending information to OneNote, from the File Tab menu choose Options and from Options click the Send to OneNote item and from the pane you may select how you want to import items into OneNote.

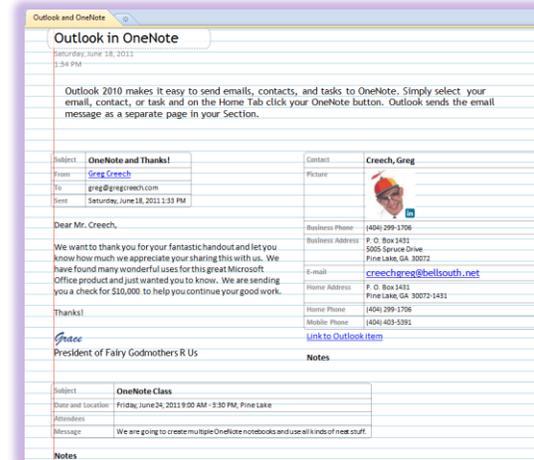
From then on, OneNote and Outlook assumes this is the location to use for this item. I am sending the OneNote Preparation Task in Outlook to my Outlook and OneNote section of Greg's Notebook in OneNote.





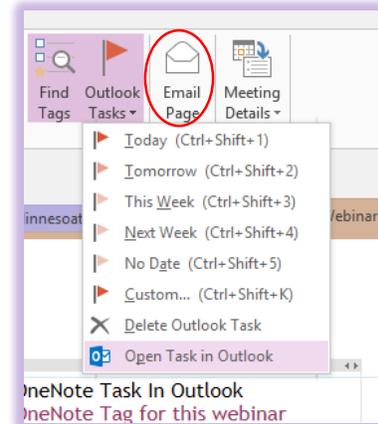
After I click OK here's my page in this section.

It is very easy to send and to share information with OneNote and Outlook. Emails duplicate and include the attachments and body of the message; however, subsequent email threads do not update the OneNote page. Contacts, calendar, and tasks share with the applications, and Outlook controls the information.

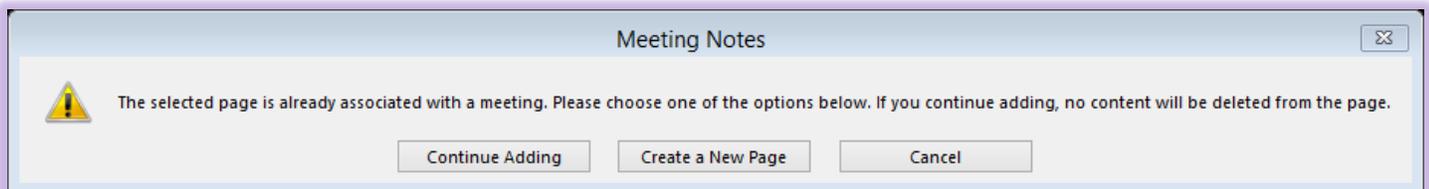
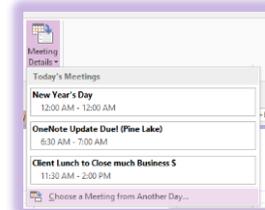


You may share your Outlook tasks and view them from OneNote. I created a custom task in OneNote and I can view the to do in Outlook. I used a tag for this task, too.

Notice the Email Page button circled at right. As easy as it is to send a message from Outlook to OneNote, you may as easily email a page from OneNote through Outlook, except OneNote does not use your Outlook signature. You should set your signature in the options for OneNote, which we learned earlier.



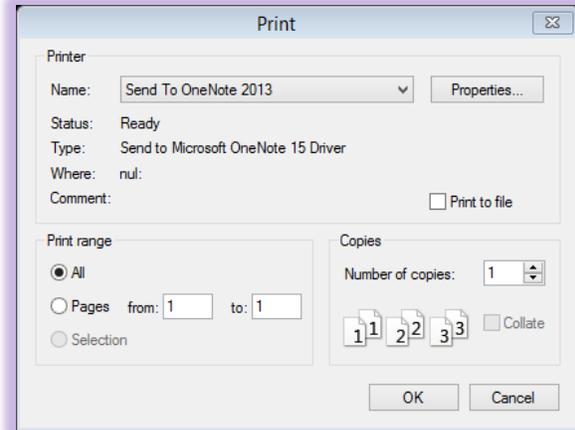
My OneNote notebook incorporates with my Outlook calendar very nicely. In OneNote the Meeting Details button appears on the Home Tab for me to see the meetings for today or to navigate to another date. When I click the meeting, OneNote inserts the meeting date/time and other information into the current page or a new page. When I try to place two meetings on one page the message below appears, and I choose *Create a New Page*.





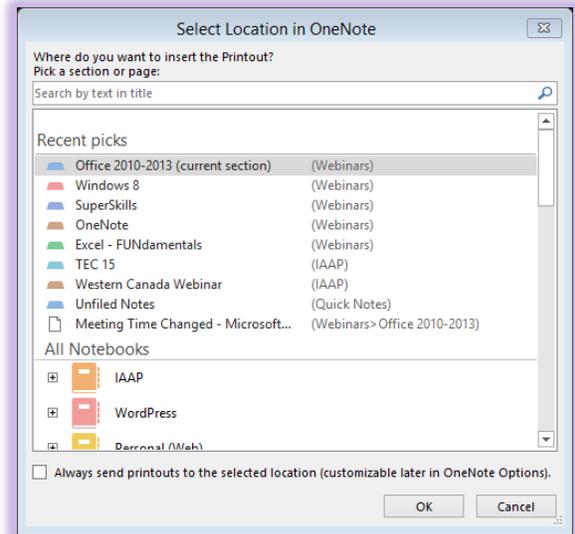
## Printing and OneNote

As you can tell, OneNote and other applications work well together. Earlier I mentioned about Printing to OneNote. While you may print your pages and items within OneNote, other files, websites, and so on have OneNote in the printer selection. As displayed at right, you may choose Send to OneNote from your printer lists and selections. After clicking OK, OneNote may prompt you for the notebook and section you wish to place the information.



### On Your Own, Baby! Exercise your Skills -

1. Open Outlook 2010/2013 and send an Email to a page in your notebook by selecting an email in your main Inbox view and clicking the OneNote button on the Home Tab or using the right click shortcut menu.
2. Next, create an appointment in Outlook and click the OneNote button to send this to your notebook, section, and page for the notes.
3. Create a task and send this to your notebook, section, and page.
4. For fun, send some contacts by right clicking on a contact and from the shortcut menu choose the OneNote item.
5. Link notes in a meeting or contact to an OneNote page.
6. Open a webpage and using your print function in your browser (CTRL + P is the keyboard shortcut) choose the Send to OneNote 2010 or Sent to OneNote 2013 printer from your list of printers in the Name list. After clicking OK, OneNote prompts you with the screen below about where you want to place the webpage. After choosing your location and clicking OK, OneNote begins inserting the document into your desired page.
7. Open a file (PDF, Word) and print the file/document to your OneNote notebook.



*Write your notes here:* \_\_\_\_\_

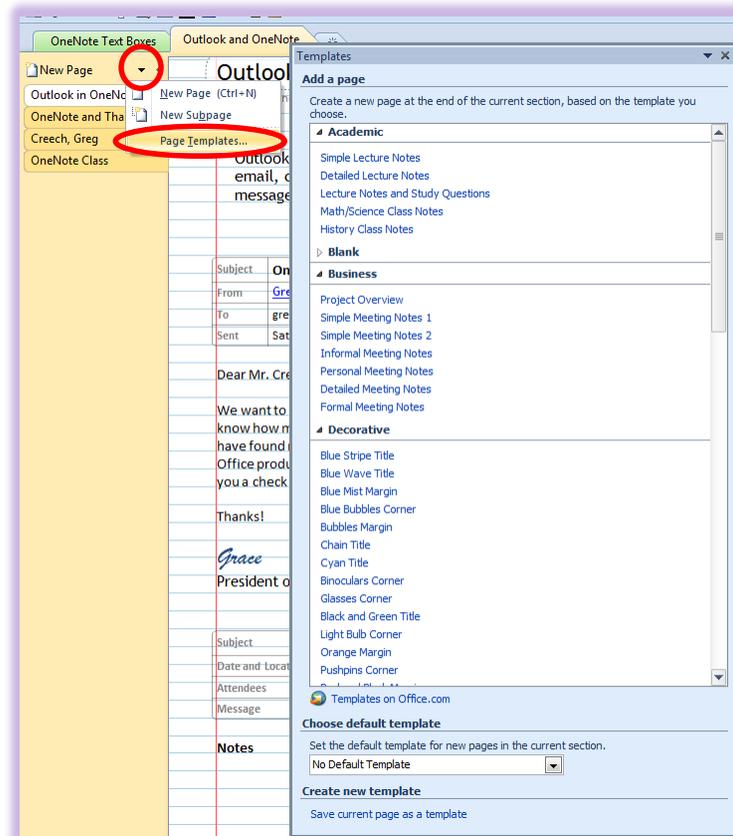


## New Pages and Templates

Like an analog, paper, 3-ring binder notebook you can add sections/dividers and pages to your digital notebook. In OneNote 2010 when you click the arrow for your New Page (circled at right), OneNote provides the Page Templates item and wow are there lots of neat templates to use for all kinds of applications. These templates provide placeholders for your items, such as if you select Academic and Simple Lecture Notes, OneNote gives a nice graphic and placeholders for home work, todays topics, and most important facts. Some of these templates are great for formal/informal meeting agendas, minutes, and projects/plans.

I'll concentrate on creating your own blank page and inserting items, but you should review and use these pages for your business, classes, and fun stuff.

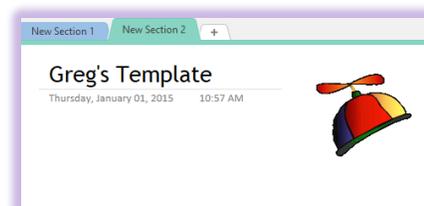
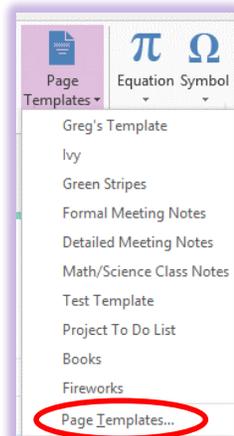
**Create your own template.** You should design a page with your logo, text box, and other items and from the pane displayed at right click the *Save current page as a template*. I created my own template using this feature. You may want to set a default template for all of your pages from the Template's pane, too. Using the Templates pane is the same in OneNote 2010 and 2013.



New for  
2013!

**Page Templates Command Button – Insert Tab** – In 2013 OneNote the Insert Tab includes the Page Template button. The New Page arrow does not exist in 2013, so you may use and create templates using this command button. Notice I am using Greg's Template which includes a blank

page, Greg's Template name, date/time, and my propeller hat logo. The Page Templates item (circled at right) provides a pane that can list all of your templates based on type of template. Trust me, there is a template to help you and give ideas on creating your own template. Enjoy.





## On Your Own, Baby! Exercise your Skills -

1. In your 2010 Notebook, Click the New Page Arrow and from the drop down list choose a category that interests you, such as Academic, Business, Decorative and click a template you think you would like for a new page. If you don't like your selection click another and the template replaces your current new page.
2. In your 2013 Notebook, click the Add New Page item and give your page a name. From the Insert tab select a template using the Page Template command button and menu.
3. After you finally decide your template, click in the place holder areas and enter your information. First and foremost is to name your page and choose a page color. Next fill in the placeholders and add text.
4. Create a blank, new page and add your logo, a text box with a tag line, and other information. Save your page as a template to reuse.

In the next section, we will add photos, video, audio, and attach files to your page.

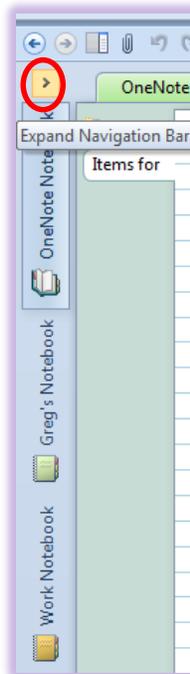
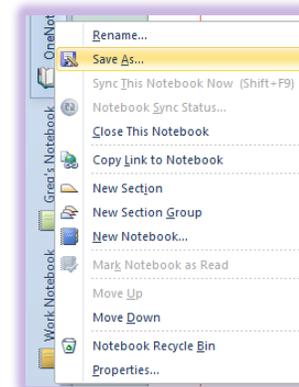
*Write your notes here:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## OneNote 2010: Don't Hesitate – Navigate: The Navigation Pane

As with many Office applications, especially Outlook, PowerPoint, and Access, you have the Navigation pane to quickly maneuver to other areas of the application and OneNote is not an exception. The Navigation Pane as displayed in a collapsed mode here allows me to open other Notebooks quickly by clicking the Notebook.

**🔥 A Hot Tip! I can move the notebooks' location by clicking and dragging the Notebook up or down to a new location on the Navigation Pane. Also, right clicking on a Notebook in the Navigation pane displays the shortcut menu for you to quickly create a notebook, section, and other items as displayed here.**



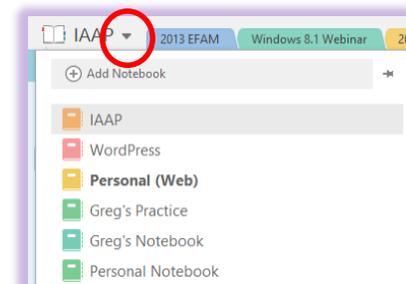
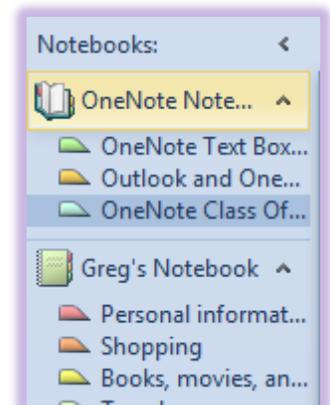
When you expand the Navigation Pane by clicking the expansion arrow, you may quickly access a section of the notebook.

### On Your Own, Baby! Exercise your Skills –

In your Notebook, expand and collapse your Navigation Pane as you create notebooks, sections, and pages.

New for  
2013!

The Navigation Pane virtually disappears in OneNote 2013 and activates by an arrow displayed at right. The current notebook (IAAP in this case) is open and from the arrow I may select another OneNote file to open. Since I have my pages viewed at left, my pages view resembles my navigation pane. You may still rearrange your notebooks by clicking and dragging them within your Navigation Pane view. You may pin your Navigation Pane so it stays open for you. You'll see the push pin button when your Navigation pane activates from your notebooks drop down list.

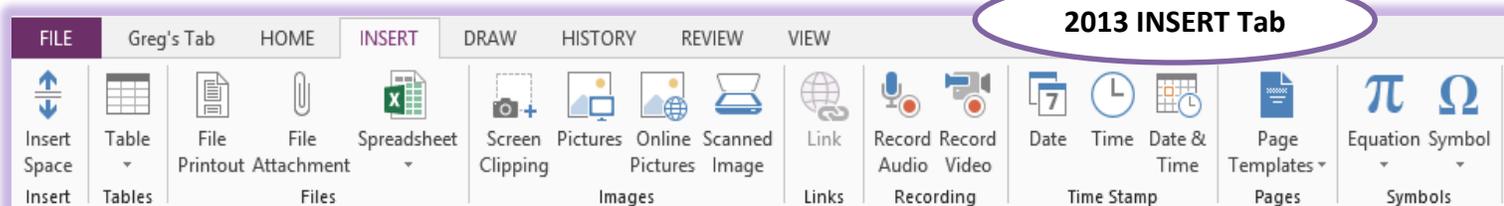
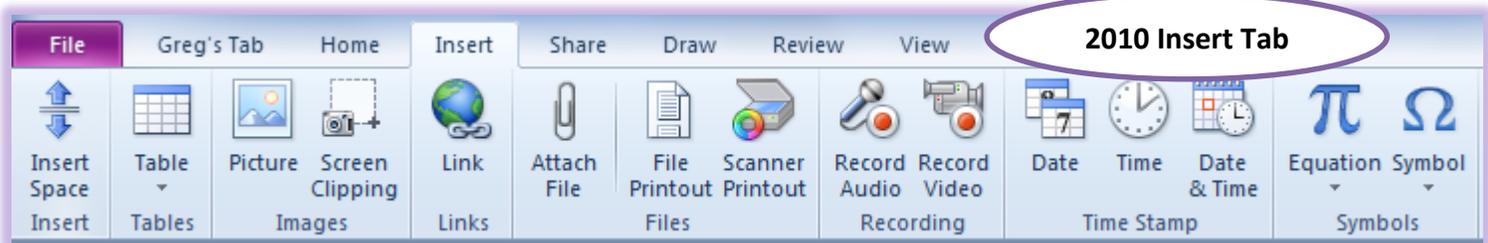




## Insert Tab

A blank page is worth nothing so we need content and the Insert Tab provides many types of content from PDF files to videos and a whole lot in between. Pictured below are the 2010 Insert Tab and then the 2013 Insert Tab. While the different versions rearrange the buttons and groups, the only new buttons in 2013 OneNote are the Online Pictures, the Spreadsheet, and the Page Templates buttons. Online Pictures replaces Clip Art. We'll examine the new Spreadsheet button and we previously learned about the Page Templates button.

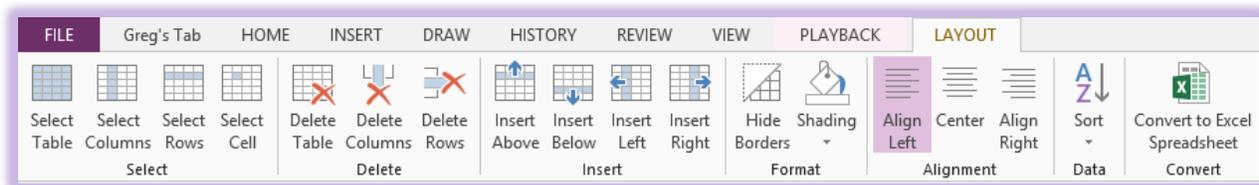
As I briefly describe each button below, you should begin using the button as you review this document. So be in an OneNote note and create items using the buttons and Insert tab. For example, build a table in a moment and practice using some of the features in the Layout Tab. So get ready to record a video of yourself (if you have a camera and microphone on your



computer) and an audio file quickly and easily using OneNote. Also, these features are only available in the full desktop version – online app and some tablet versions do not have the ability to record nor playback videos.

Insert Space allows you to click the button and then click up or down to create more space for your notes and items on a page. OneNote allows you to click and drag to reposition your objects and items and create different spacing, too.

Tables – Like all Office applications, OneNote provides a means for creating tables and provides a contextual tab, Layout, for editing your table and creating borders, inserting/deleting





rows and so on. The Layout tab appears above. While these tables are good and functional, they do not have all of the functionality of Word or Excel's tables.

**2013 OneNote Layout Tab for Tables Tools** has two new buttons for you. The **Sort button** allows you to sort by a column and you may convert a table an Excel Spreadsheet using the Excel **Convert button/group**. My simple table appears at right.

New for 2013!

**File Printout** – The File Printout command will display an entire file for you. I like to have a PDF, Word , or other document visible for me in OneNote rather than having to open the file through a hyperlink. OneNote creates a page with subpages for each PDF, Word, etc. pages and looks fantastic. I like this for short documents but you may insert many pages from other files and have them to easily view without opening a file through a hyperlink or attachment. OneNote provides a link and a text box displaying where the file originated. Really cool stuff!

Item	Description	Cost
6500	Excel Manual	\$55
6600	Word Manual	\$55
6700	PowerPoint Manual	\$55
6800	OneNote Handout	Free

**Attach File** – I bet you have used the button a time or two in Outlook and other applications. You may insert any file that you have access into your OneNote page through this button and navigating to where the file(s) is/are stored and inserting the link to your file. You may double click the attachment icon to open the file in the appropriate application.

New for 2013!



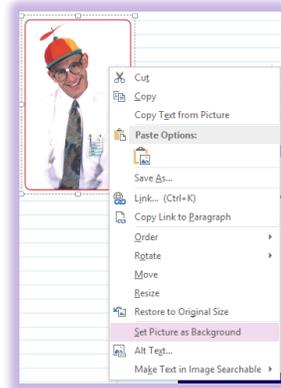
**Spreadsheet (2013 Version)** – This inserts an existing Excel spreadsheet into your page or creates a new Excel spreadsheet on your page. OneNote works with Excel and opens Excel for you to edit your workbook. You may link your workbooks together – the workbook in OneNote and

the workbook in Excel so that they update one another. When you use an existing Excel spreadsheet, OneNote prompts you to insert the file as an attachment, as the spreadsheet/file itself, or as a chart/table.



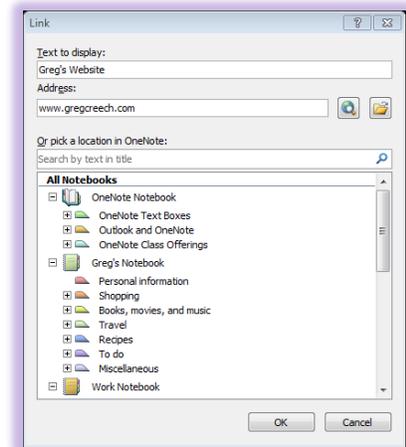
**Screen Clipping** – Allows you to click and drag an area of your previous application to insert the screen shot into your OneNote Page. For example, I was in Outlook and then in OneNote I clicked the Screen Clipping button and Microsoft Office opened Outlook for me and grayed out for me to click and drag an area that I wanted. After I release my mouse button from clicking and dragging my selected area, OneNote places my screenshot selection into the OneNote page. This only works on the last application you were in before returning to your OneNote file, but it is a quick and easy way to insert a section of your screen or desktop into your page.

**Picture** – This inserts photos from your computer, servers, and so on and works the same as in other Office applications. OneNote does not have the formatting capabilities of Word, Publisher, or PowerPoint, so you should have your photo formatted and ready to go using another application rather than OneNote for your photo formatting and editing. However, there are neat options when you right click on an inserted photo in OneNote and from the shortcut menu make your photo a hyperlink, background, etc.



**Online Pictures** and **The Scanner**. Clip Art is gone and Online Pictures replaces it. Online pictures may use good, old Clip Art from Office.com but there are other services and social media available, now, for your photos. The Scanner Printout (2010 Version) or Scanned Images (2013 Version) inserts photos and other items into your OneNote page through your attached scanner and scanning software.

**Links** – You can provide hyperlinks to many objects through this button. You can hyperlink to web sites, files, and practically any object in the universe! As displayed at right, I am providing a hyperlink to my website. The buttons to the right of the address area allow you to browse the internet for your site or folders/files on your computer/servers. OneNote provides a quick means to hyperlink to other notebooks, sections, and pages in the pane below your Address. You may use photos, objects, text, and other items as a hyperlink.



**🔥 A Hot Tip! The Hyperlink shortcut keys are CTRL + K. CTRL + K always activates your hyperlink pane in Office applications. 🔥**

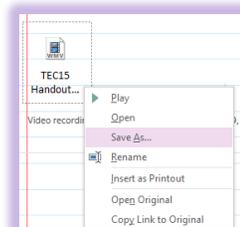


**Record Audio and Record Video** – Anytime I present my OneNote training session, webinar, or workshop, everyone applauds because of OneNote's video and audio recording/playback features and their ease of use. You may create audio and video content into your page with these buttons. While you may insert existing video and audio files as an attachment into your OneNote page, you may easily create your own custom video and audio clip. This is so easy if you have a built in microphone and camera on your desktop or laptop. Clicking the Record Audio or Record Video button activates your microphone or camera and begins recording. The Audio & Video Tab at right displays when you are recording or playing your media content. Thankfully, the features and Audio & Video Playback tabs are the same in 2010 and 2013 OneNote. The important Playback tab displays here. Go ahead and create your own quick video and audio files in OneNote.



➤ **Hot Tip! You can save your video and audio**

**recordings in OneNote as separate files to email and use in other applications. Simply right click on your video file and from the shortcut menu displayed here choose Save As to save your video/audio in another format, i.e. .wmv.** ➤

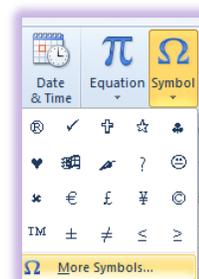


**Time and Date Stamps** – These buttons are important to create a history and snapshot of projects, performance, and other measurements where you do not want the date or time to change on an item. OneNote provides the stamps automatically when you insert items into your notebook or record information.

New for  
2013!

**Page Templates (2013 Version)** – This command button and associated menus display a list of templates from which you may base a new page upon. There are tons of great templates and you may create your own page template. See the earlier section on New Pages and Templates for additional information.

**Symbols and Equations** - You may insert various equations, functions, and formulas using the Equation command. After viewing some of these equations and functions you will see why OneNote is very popular for math/algebra teachers, engineers, statisticians, etc. (I will leave this to the mathematicians and engineers to explain; there are too many signs, cosigns and tangents that as a Liberal Arts person – I rather forget!) You may insert symbols, such as copyright, smiley faces, and other using the symbols and more symbols items displayed here.



**On Your Own, Baby! Exercise your Skills – Now, your turn.**



If you did not accomplish a task for each command button on your Insert Tab, please you should take the time to do so now. Here are suggested items to use and learn:

1. In your Notebook, create a new section and new page. Rename them and recolor your section and pages.
2. Insert a 3 x 3 table and enter information in the cells – use your tab key to move from one cell to another. Create a fourth row by pressing the tab key at the last cell of your table, and OneNote creates a new row for you.
3. Insert a photograph and screen shot.
4. Create a hyperlink to a file on your computer and create a hyperlink to [www.gregcreech.com](http://www.gregcreech.com).
5. Attach a file from your computer and insert a file printout.
6. Insert an audio recording of you describing the Insert tab.
7. Record a video thanking everyone for your Academy Award. Insert a Time and Date stamp on any of your items.
8. If you are a math person, insert an equation; if you are a liberal arts person, insert the copyright or other symbol. Here's a screen clipping of my inserted items, including Hyperlinks, Screen Clipping, Files, Audio, Photo, Table, Time and Date stamps, and a PDF Printout.

**Items to Insert**

Saturday, June 18, 2011  
4:26 PM

[Greg's Web](#)

OneNote Handout

Items to Insert

audio recording started: 1:58 PM Sunday, June 19, 2011

Inserted from: <file:///C:/Users/Greg\_Creech/Documents/abc%20of%20keyboard%20shortcuts.pdf>

abc's of keyboard ...

Item	Description	Cost
6500	Excel Manual	\$55
6600	Word Manual	\$55
6700	PowerPoint Manual	\$55
6800	OneNote Handout	Free

6/19/2011 2:37 PM

Greg Creech  
404-299-1706

**Techedutainment Services, Inc.**

Enjoy and Share!  
[www.gregcreech.com](http://www.gregcreech.com)

**My Favorite Keyboard Shortcuts (Office 2007/2010 and others)**

Keyboard shortcut	Command	Keyboard shortcut	Command
CTRL + A	Select All	CTRL + T	Excel Create Table
CTRL + B	Bold	CTRL + U	Underline
CTRL + C	Copy	CTRL + V	Paste (The Paste icon will appear offering you popular options, such a Match Destination formatting)

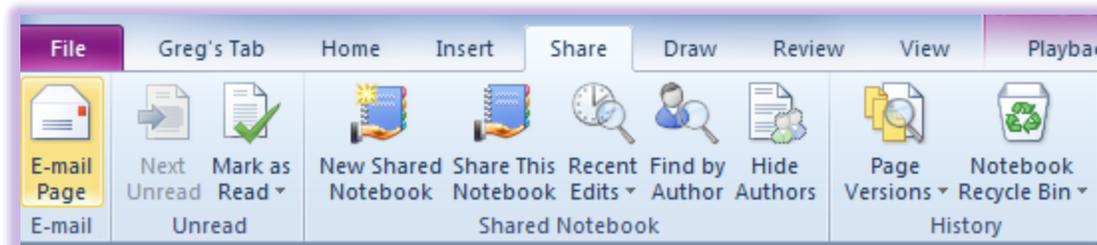


## The Share Tab (2010 Version) – It's polite to Share

✎ **A Hot Tip! 2013 OneNote retires the Share tab and the tab does not exist. 2013 OneNote added a new tab – History that incorporates some of these tracking commands. The Share and the History tabs display below. You may share your OneNote file using the Share Item on your File tab menu. The OneNote Home tab, Review, and Insert offer many ways to share your information, too. The Share or History tabs are necessary and helpful in a collaborative environment and with multiple users of the notebook. However, I restrict the notebooks for many people to read only. ✎**

Sharing your notebook with others in many ways and formats is easy. You may share your notebook and retain ownership through

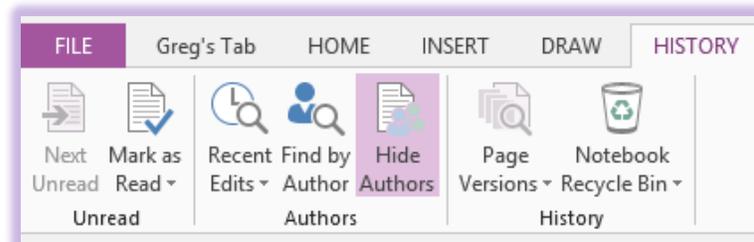
Email sharing or you may collaborate with others using alternative sharing techniques and storing your notebook on a web site or server. In 2013 OneNote you may assign edit or read only capability when you invite people to use your notebook.



You may share your page through Email which puts your information in the body of an email for (the first command button on the Share Tab). You may use the File tab and use the Save As item to save your page as a PDF and other formats to email as an attachment. But the power of the Share tab is using the notebook over a server or web to have collaboration. OneNote retains a history and versions of your notebook as you and others make changes so you may revert to previous editions of your notebook. A Search pane will display at the right part of your window for many of these items such as Find by Author and Recent Edits. This tab and the OneNote 2013 History Tab are important for you in team and collaborative notebooks to track changes and edits. Depending upon how your organization sets up OneNote on your servers some of these options may not work or may not provide full information on items such as edit tracking and page versions.

## The History Tab – 2013 Version

Thankfully, the History tab provides ways of viewing your collaborative notebook that are similar to 2010's Share Tab. In 2013 OneNote, you may share a notebook using the File tab and the Share item on the Navigation pane.



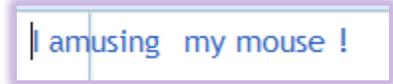
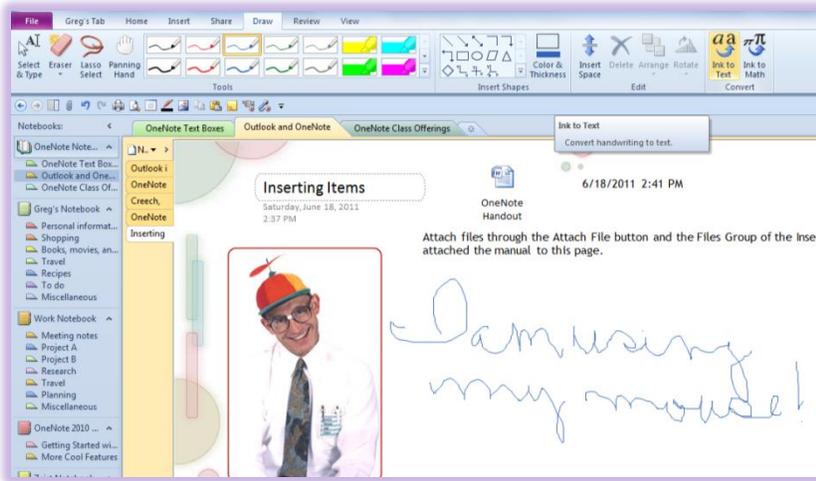


## On Your Own, Baby! Exercise your Skills –

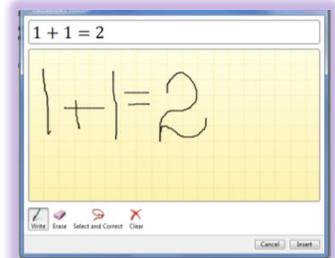
In your Notebook, activate Share this Notebook and save to a server or website and have others make edits. As people make edits use the Read and Unread buttons, and the other buttons to view edits and versions.

## The Draw Tab - Quick Draw, McGraw!

The Draw tab is better suited for using OneNote on a tablet device using a stylus or with a pen and tablet associated with a desktop/laptop. Drawing sucks with a mouse or fingertip and is cumbersome which is what I am using. My ink notes and items will appear awful because of using a mouse or fingertip rather than a pen and tablet, but you'll get the idea. For example I choose a drawing tool and wrote: *I'm using my mouse!* Which is quite crude looking but when I click the Ink to Text button OneNote does a good job of converting my sloppy mouse writing to text as displayed here as: *I amusing my mouse!* I can edit the text box to including and delete the spacing. Using a pen and tablet are far more precise. You may insert basic shapes and change the color and thickness and you may use the panning hand to click and drag through your scrolling, especially if you do not like using the horizontal and vertical scrolling bars.



Ink to Math works as does the Ink to text by creating a text box with your equation in the text box that you have drawn on your page. I display the Equation Tools Design tab below. I am using the complex equation of  $1 + 1 = 2$  as a drawing item and then convert it to a text box using the Ink to Math button. After my correct (and complex) equation is complete, I click Insert and





OneNote displays my sloppy equation as a nicely formatted text box. When you are working with math and equations, the Equation Tools and Design tab appear. As I wrote earlier, now, this is a tab that will drive liberal arts folks right out of OneNote and into Excel! HOWEVER, Mrs. Palmer, my algebra and magnificent math teacher, and engineers, scientist, math students would love this, but I was not Mrs. Palmer’s star student, so I’m not fond of this tab (I prefer the Design and Format tab for photos and shapes!). If you are math person, you should play around with this and enjoy!

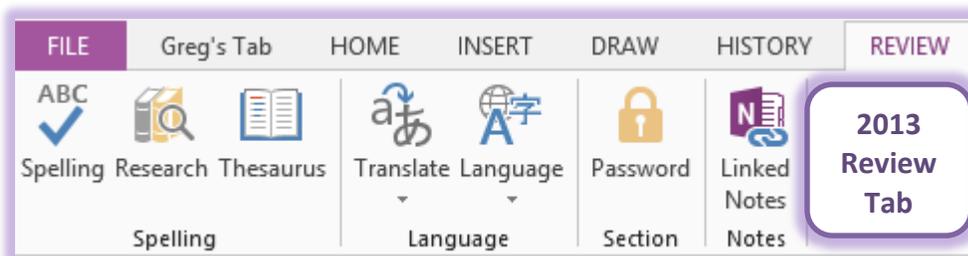
The lasso and erase tools are good, again, if you have a pen and tablet. Lasso lets you create a loop around your items using a stylus, pen or mouse this creates box for you to resize, move, copy, cut and convert your selection through the Lasso.

### On Your Own, Baby! Exercise your Skills -

In your Notebook, use the Draw items in an existing page. Practice drawing items and writing and then converting the ink to text and create your own complex formula, such as  $2 + 2 = 3$  (oops! I mean)  $2 + 2 = 4$ . Or maybe you are ready for sines, cosines, and tangents; you may even want to use the Polynomial equation. Use the Panning Hand to scroll through your page.

## Review and Password Protection

### Review Tab – 2010 and 2013 Versions



The Spelling and Language Groups are similar to other Office applications allowing you to quickly check your spelling and using a Thesaurus, Dictionary, and Encyclopedia (all of which I use quite regularly in Word and PowerPoint and now OneNote!).

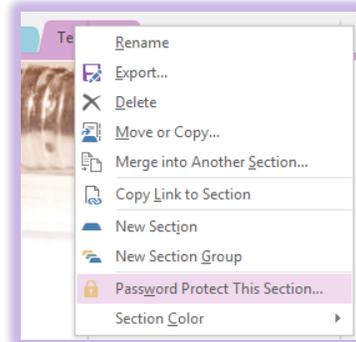


Translate and Language are for simple changes and translations. Translations are for words and simple phrases not for your entire page or section. Microsoft offers online translation and interpretation services (for a nominal fee!) for more complex translation.

For me the Linked Notes button isn't very helpful and I would rather use the hyperlink or attach file buttons. While this will dock your OneNote page on the right section of your screen as you use another application, OneNote does not duplicate your typing or information. However, this does provide a pitiful link to your application and file. This is nice for viewing but not inserting and editing as you type in another applications – now that's what I need.

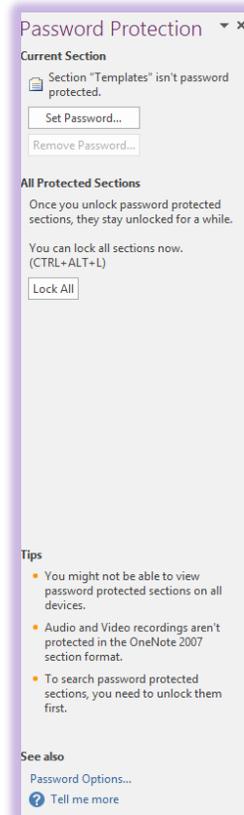
## Password Protection for Sections

You should protect your notebook's sections with a password if you are using your notebook on the web and server. While you may require a login and invite only certain people to your notebook, password protection adds security to important information in sections. Sections, not pages, use password protection. Organizations use OneNote for marketing, sales, engineering, and other confidential projects and educators/students use OneNote for classes and tests, these shared notebook sections should have a password.



**➤ Password Protection: Remember to Password protect a section is easy – simply right click on a section's tab and from the shortcut menu choose Password Protect This section. Sections may contain many pages. Better safe than sorry. Also, you will need to set a time limit to have the page open after you give the password. ➤**

Password (2013 Version) – This command button activates the Task Pane you see at right.

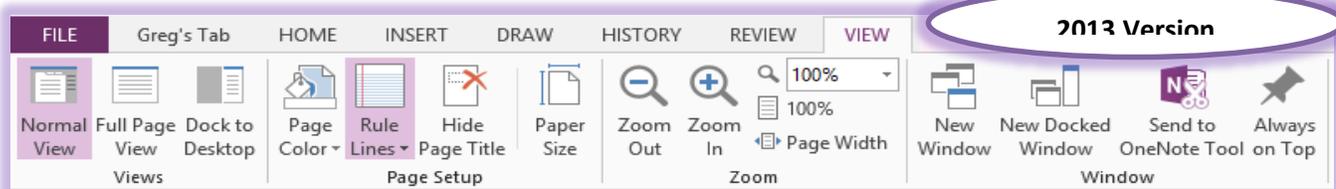
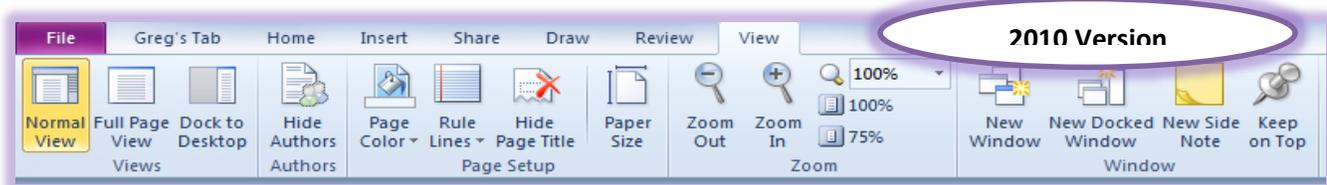


New for 2013!

The Password Protection task pane is very similar in 2010 and 2013 versions. You may set a password using familiar creation and confirmation screens and do not forget a password as OneNote warns you. The Password Options link at the bottom of this pane navigates to the Password locking options we learned earlier where you set a time limit to have the section open after giving this section a password. I set my unlocked sections to 10 minutes and require a password when I navigate away from the page.



## View Tab



The View Tabs in OneNote 2010 and 2013 are similar as displayed above. The View Tab allows you to use various ways of seeing your information – I generally remain in the Normal view and rarely hide my authors. While I may dock this to my desktop application, I find this more distracting than helpful. However, as you work in one application this is an easy way to type and add items in OneNote without minimizing or opening OneNote. The Window group allows you to open a second occurrence of OneNote so you may view different notebooks, sections, and pages together. If you want to have a page docked so that the page remains on your screen as you navigate and use other sections and pages, the New Docked Window is for you. I use this when I need to keep a page open as I refer to other pages and sections.

The Send to OneNote tool is a constant in my task bar so I may clip, copy, and paste information in many applications easily to my OneNote notebook.

I enjoy changing my page colors, types of rule lines, and I can even have my section, page color and line colors match. I use Rule Lines for viewing my information as an old fashion notebook with lines and a right margin. You may also change your rule line colors using the Rule Lines drop down menu. I like color coding my pages using the Page Color menu and I like using the zoom.

**🔥 A Hot Tip! Zoom shortcut keys and New Window. You may use your mouse wheel and the CTRL Key to zoom in and out, tool. Pressing and holding your Control (CTRL Key) while moving your mouse wheel up or down zooms in and out for you.**

**The New Window button in the Window group of the View tab allows you to open a separate session of OneNote so you may view the same page side-by-side or other divisions in your OneNote notebook next to each other. You may to arrange the panes after opening them separately. 🔥**



---

## In the End . . .

At the end, you'll enjoy your digital notebooks and scrapbooks by putting everything digital in one place. Hopefully, you found this document helpful. However, as I related earlier you should use the Personal Notebook, Work Notebook, and the OneNote 2010/2013 Guide which are built into the application. These will help you as you modify and enhance the notebook you created here. Take Note and Enjoy! I'd love to hear from you! [greg@gregcreech.com](mailto:greg@gregcreech.com).

Thanks.



## Index

<p><b>A</b></p> <p>Attach file .....24</p> <p>Audio .....26</p> <p>Audio &amp; video .....12</p> <p><b>C</b></p> <p>Color .....14</p> <p>Create your notebook .....10</p> <p>Customize ribbon and quick access toolbar panes .....13</p> <p><b>D</b></p> <p>Dictionary .....30</p> <p>Display .....12</p> <p>Draw tab .....29</p> <p><b>E</b></p> <p>Email .....17</p> <p>Equations .....26</p> <p><b>F</b></p> <p>File printout .....24</p> <p>File tab .....8, 9</p> <p><b>G</b></p> <p>General pane.....12</p> <p>Greg creech ..... 5</p> <p><b>H</b></p> <p>Home tab .....14</p>	<p><b>I</b></p> <p>Index .....34</p> <p>Info ..... 8</p> <p>Ink to math .....29</p> <p>Ink to text .....29</p> <p>Insert tab .....23</p> <p><b>L</b></p> <p>Linked notes.....31</p> <p>Links.....25</p> <p><b>M</b></p> <p>Meeting details .....18</p> <p><b>N</b></p> <p>Navigation pane .....22</p> <p>New page .....20</p> <p>New section .....14</p> <p>New tag.....15</p> <p><b>O</b></p> <p>Options .....12</p> <p>Outlook .....17</p> <p>Outlook calendar.....18</p> <p>Outlook tasks .....18</p> <p><b>P</b></p> <p>Password.....31</p> <p>Password protection for sections31</p> <p>Password protection task pane ..31</p> <p>Passwords section .....13</p>	<p>Picture..... 25, 26</p> <p>Print ..... 8</p> <p>Proofing .....12</p> <p><b>R</b></p> <p>Rename.....14</p> <p>Review tab .....30</p> <p>Rule lines.....32</p> <p><b>S</b></p> <p>Save &amp; backup.....12</p> <p>Save as ..... 8</p> <p>Scanner printout .....24</p> <p>Screen clipping .....25</p> <p>Share tab.....28</p> <p>Space .....23</p> <p>Spelling .....30</p> <p>Symbols .....26</p> <p><b>T</b></p> <p>Table of contents..... 2</p> <p>Tables .....23</p> <p>Tags.....15</p> <p>Templates .....20</p> <p>Thesaurus.....30</p> <p>Time and date stamps .....26</p> <p><b>V</b></p> <p>Video .....26</p> <p>View tab.....32</p>
--	--	---