Gaining Your Effective **EDGE**

WITH MICROSOFT ONENOTE

2013-2016 OneNote Quick Tips

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The Basics

What is OneNote again?

OneNote is a Microsoft program that performs like a digital three-ring binder. It allows you to compile information from many different sources in an easy to use binder format that is easy to search, learn and integrate with Outlook.

How do I access OneNote?

From your Windows start button, go to your Microsoft Programs and click on the OneNote desktop option that appears with a year next to it. Ex: OneNote 2016.
Note: If you have never opened OneNote before, it will tell you it needs to run a set-up. Allow this. It may also prompt you for your log-in credentials.

To Create a New Notebook	To Add a New Section/Tab	To Add a New Page
1) Go to FILE 2) Select NEW 3) Enter a Notebook Name, choose where to save it, and click CREATE	1) Click on "+" right beneath the ribbon area 2) Type a name into the tab 3) Click Enter	1) Click "+ ADD PAGE" on the far-right side of your notebook (beneath a search box)
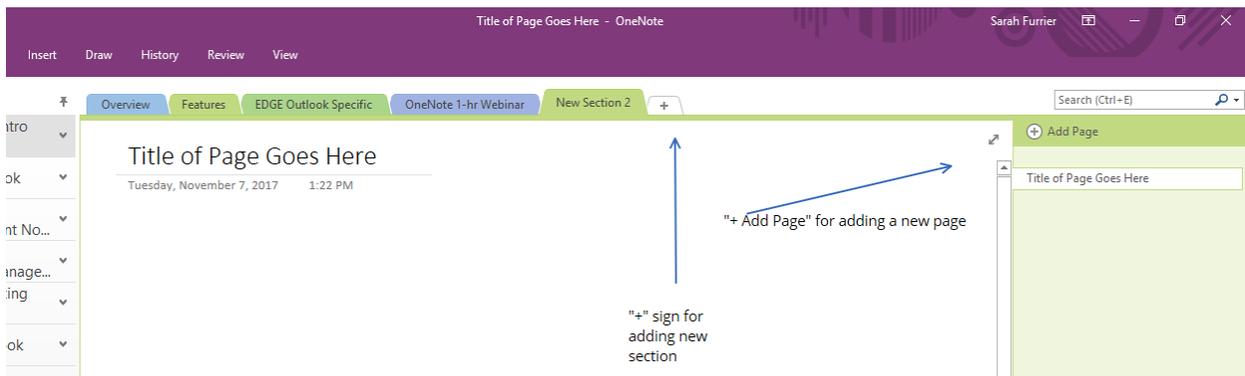
To See All Visible ribbon/notebook options
1) Click on "HOME" tab (or "INSERT" for 2010 users) 2) Click on the push pin icon appearing on the far-right side of your ribbon area 3) Click on the downward arrow in the left hand panel next to the Notebook name 4) Click on the push-pin that will appear in the top right corner of the drop down

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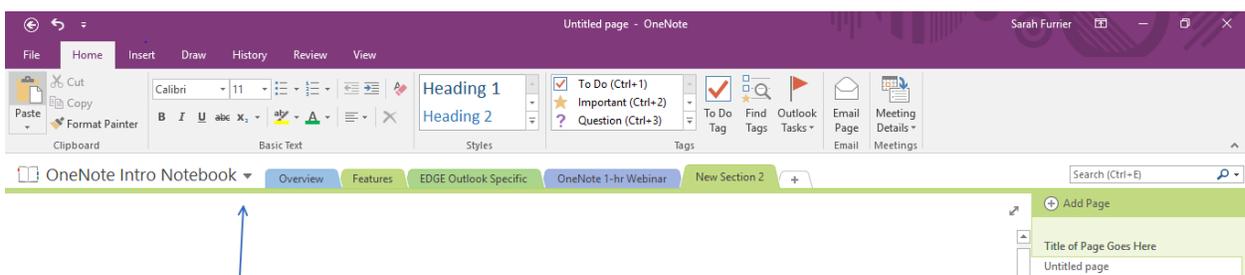
Integration with Outlook

Link a Calendar Appointment with the Details from Outlook, in OneNote

1) Open calendar appointment in Outlook
2) Click OneNote button in ribbon
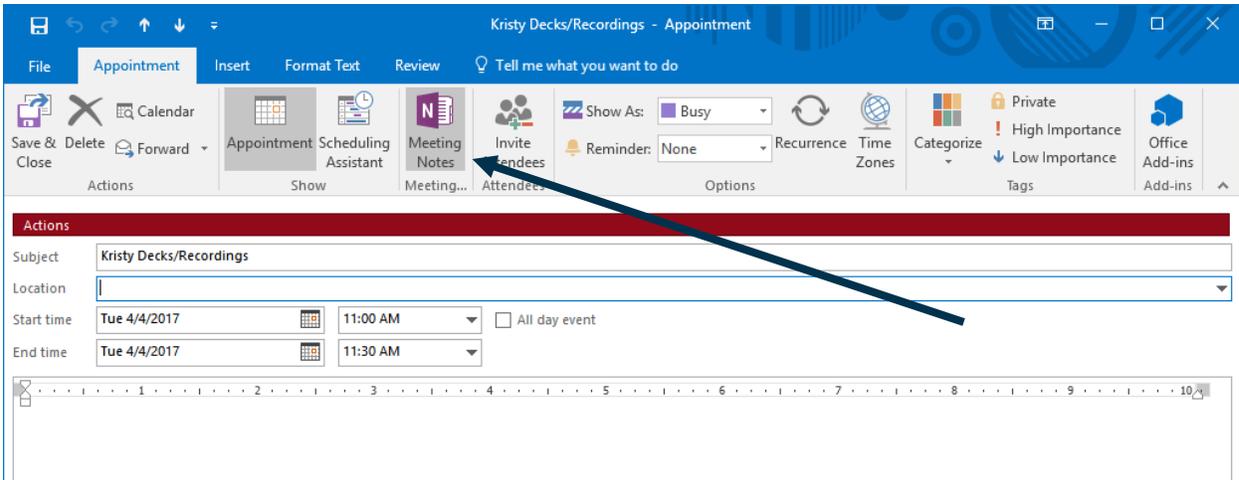
Link a Task in OneNote, to Outlook

1) Highlight item in list and press Ctrl Shift K or right click on the text and select Outlook tasks
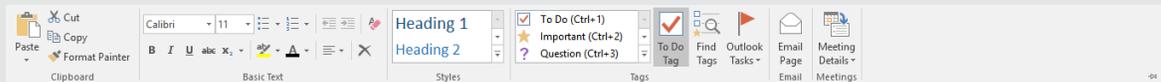
2) Or click on the Home Tab and select the To Do Tag from the ribbon
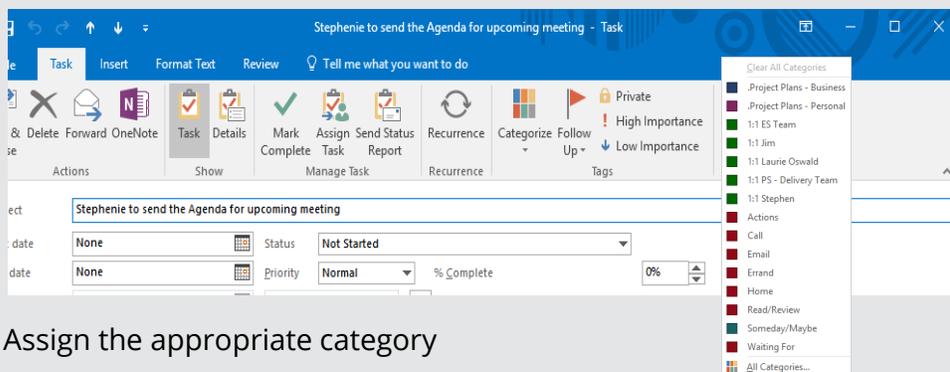
3) Assign the appropriate category

   a. Once the item is complete, mark the task as complete in Outlook or OneNote, and it will update the task as complete in the other program.

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Copy an Email from Outlook, to OneNote

1) Highlight the email from list and select OneNote icon in top ribbon
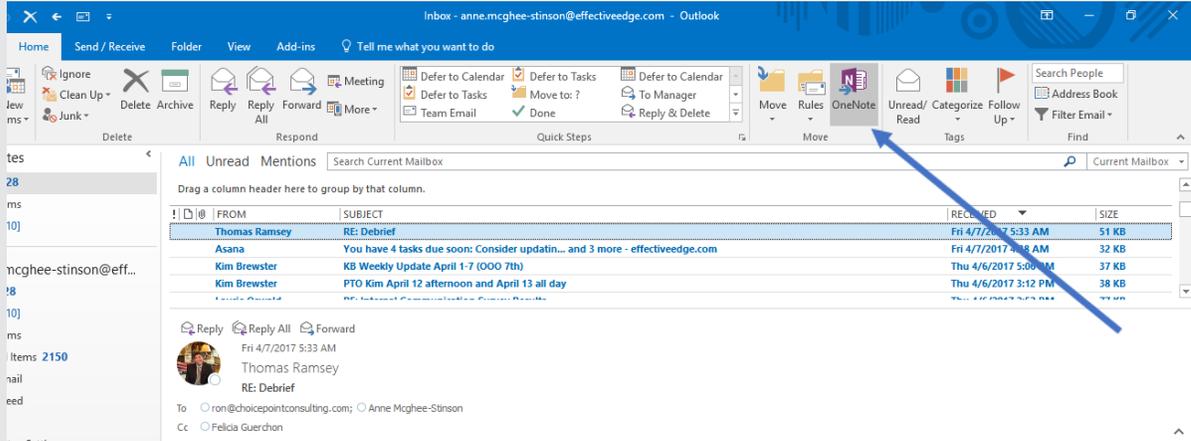
2) Select appropriate location in OneNote, for email

3) The email will copy over and appear as a page in the section you selected, or in an existing page- depending where you chose to send it.
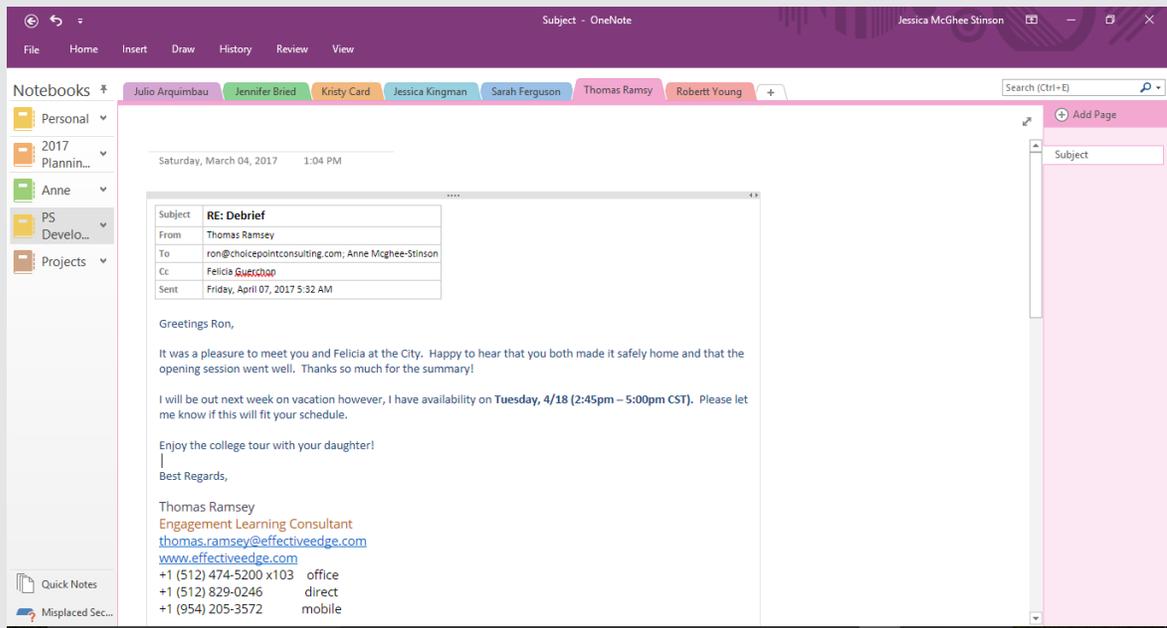
To Share a Notebook or a section of a Notebook with another person

3) Click on the SHARE tab in OneNote Share This Notebook
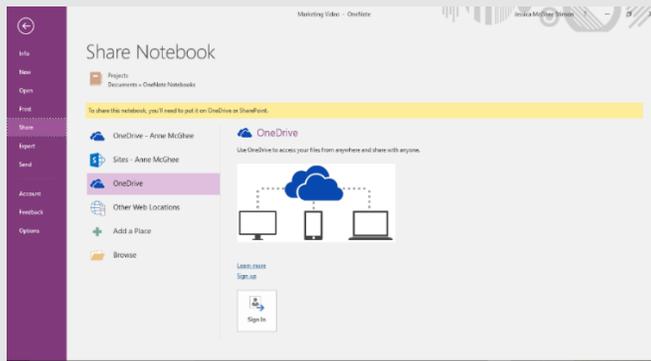
4) Choose a method for sharing (web or network)
   a. Recipient will need to have access to the same location through which you are sharing.
5) Email the link to a colleague or group that will give them access to the notebook.
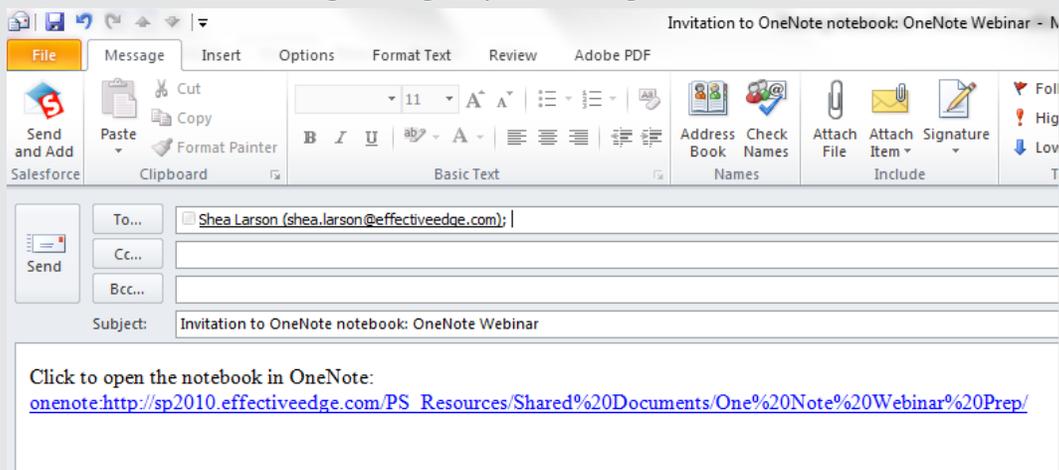
What if I don't have the OneNote button in my Outlook Home tab?

1) In Outlook, go to FILE → OPTIONS
2) Click on "ADD-IN'S"
3) If "OneNote Notes about Outlook Items" is listed under Inactive Application Add-in's:
   a. From the "MANAGE" box, click "COM Add-In's", GO
   b. In the COM Add-In's dialog box, click to select "OneNote Notes about Outlook Items" and click OK

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Additional Helpful Tips

Right click on any section (tabs at the top) to Password Protect a section

Ctrl F will search by keywords on the current page

Ctrl E will search the whole notebook

To tag text in OneNote, allowing you to personalize your notes, right click on the text and select Tag and choose the option that fits your needs. To search by tags later, go to HOME Find Tags

To enable the Audio Search capability, go to FILE Options Audio & Video and check the box: enable searching audio/video recordings

To email a page as a PDF or send it to a Word doc, go to FILE Send

To capture audio notes, go to Insert Record Audio

To take a screen shot within OneNote, go to INSERT Screen Clipping

Use OneNote's pre-made templates by clicking on "INSERT" → "PAGE TEMPLATES

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