plain & simple

Microsoft OneNote 2010

Your easy, colorful, SEE-HOW guide to OneNote!

Peter Weverka
Learn the simplest ways to get things done with Microsoft® OneNote® 2010!

Here’s WHAT You’ll Learn

- Take notes and organize them with ease
- Arrange notes in pages, sections, and notebooks
- Add pictures, drawings, and audio and video clips
- Apply readymade and custom tags to your notes
- Link notes to web pages and Microsoft Office files
- Share your notes and collaborate with others

See it. Learn it. IN COLOR.

Here’s HOW You’ll Learn It

- Jump in wherever you need answers
- Easy-to-follow STEPS and SCREENSHOTS show exactly what to do
- Handy TIPS teach new techniques and shortcuts
- Quick TRY THIS! exercises help apply what you learn right away

Microsoft Office/
Microsoft OneNote

U.S.A. $24.99
Canada $26.99

[Recommended]
For Dolly Schiller
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Acknowledgments

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Typewritten notes aren’t the only kind of notes you can write. Far from it. You can also handwrite notes and convert them to text, record audio notes, and record video notes.

Microsoft OneNote 2010 also comes with special tools for constructing outlines and math equations.

To get information from elsewhere for a note, consider attaching a file to a note, showing the printout of a file in a note, and scanning documents and putting the scanned images in notes.

OneNote 2010 makes it easy to put pictures and screen shots in notes, too.

When you’re in a hurry to write a note or you haven’t decided yet where to store one, write a side note. You can store side notes temporarily in the Unfiled Notes folder until you find a permanent place for them.
Writing Side Notes

When you want to jot down a note but can’t decide where to store it, or you want to jot down a note without first opening OneNote 2010, write a side note. Side notes are kept one to a page in the Unfiled Notes folder until you delete them or move them elsewhere.

Use these techniques to open the Side Note window and write a side note:

• When OneNote is open, go to the View tab and click the New Side Note button (or press Ctrl+Shift+M).

• When OneNote is closed or open, click the Open New Side Note icon in the notification area of the Windows taskbar (or press Windows key+N). The notification area is located in the lower-right corner of the screen, next to the clock (you may have to click the Show Hidden Icons button in the notification area to see all the icons).

The Side Note window offers the Home, Draw, and View tabs for formatting, drawing, and viewing side notes as you write them. Use the Pages tab to read, search for, create, delete, and move side notes. Click the Close button to close the Side Note window after you write your side note.

To read side notes, open OneNote (if necessary) and click Unfiled Notes at the bottom of the Navigation bar. The Unfiled Notes folder opens. Side notes are stored one to a page in this folder. Use these techniques to manage pages in the Unfiled Notes folder:

• Reading: Click a page tab to read a note.

• Moving and copying: Right-click a page tab, and choose Move or Copy to move or copy a page from the Unfiled Notes folder to a notebook.

• Deleting: Right-click a page tab and choose Delete to delete a note.

Write a Side Note

1. Click the View tab.
2. Click the New Side Note button.
3. Write the side note.
4. Click Close to close the window.
5. In the Notification area, click the Open New Side Note icon.
6. Write another side note.
7. Click the Expand the Ribbon button.
8. Click the Pages tab.
9. Click Previous Page to see your previous side note.
10. Click Close.
If the Open New Side Note icon doesn’t appear in the notification area, follow these steps to place it there:
1. Click File.
2. Choose Options.
3. In the OneNote Options dialog box, click Display.
4. Select Place OneNote Icon in the Notification Area of the Taskbar.
5. Click OK.
Manage Side Notes in the Unfiled Notes Folder

1. In the Navigation bar, click Unfiled Notes.
2. Click a page tab to read a note.
3. Drag a page tab to a section in the Navigation bar to move a page to a section in an open notebook.
4. Right-click a page tab and choose Delete to delete a side note.

Try This!

Edit a side note in the Side Note window. Notes in this window work just like other notes.
People with tablet PCs, touch-enabled PCs, or pen devices can handwritten notes. To do so, go to the Draw tab, select a pen and pen color, and drag your pen device on the pad or finger on the screen. (You can also, with unsatisfactory results, handwrite notes by dragging the mouse.)

When OneNote recognizes what it thinks are handwritten notes on a page, the Ink to Text button on the Draw tab becomes available for clicking. When this button is available, use one of these techniques to convert all handwritten notes on the page to text:

- Click the Ink to Text button on the Draw tab.
- Right-click a handwritten note, choose Convert Ink on the shortcut menu, and choose Ink to Text on the submenu.

Click the Select & Type button on the Draw tab when you finish handwriting notes and want to resume typing them.

To be able to handwriting notes, OneNote must be in Create Handwriting Only mode or Create Both Handwriting and Drawings mode. To choose a pen mode, open the Pens gallery on the Draw tab, select Pen Mode, and choose an option on the submenu.

**Handwrite a Note and Convert It to Text**

1. Click the Draw tab.
2. Select a pen (not a highlighter) from the Pens gallery.
3. Using a pen device, your finger, or the mouse, drag to handwrite a note.
4. Click the Ink to Text button to convert the note to text.

**See Also**

“Drawing Free-Form with a Pen or Highlighter” on page 116 to learn how to choose a pen size and pen color for drawing and handwriting notes.

**Caution**

If you can’t handwriting notes, OneNote isn’t in Create Handwriting Only mode or Create Both Handwriting and Drawings mode. To change pen modes, open the Pens gallery, choose Pen Mode, and choose an option.
Creating and Constructing Outlines

An outline is a list of important topics in a given subject. In a typical outline, topics are listed at different levels, with first-level topics not indented and sublevel topics indented to show they are subordinate.

To create an outline, enter the topics in a list with one topic per line. Then, to show which topics are subtopics, indent the subtopics. To number the outline, either select the list and click the Numbering button or click the Numbering button before you start entering topics and subtopics (the Numbering button is located on the Home tab).

To help construct outlines, OneNote offers the paragraph selection handle. Move the pointer over a paragraph to make its paragraph selection handle appear on the left. Do the following with the paragraph selection handle to construct an outline:

- Change the indentation level: Drag the handle to the left or right to indent a topic. You can also press Tab or click the Increase Indent Position button on the Home tab to move a topic to a lower level; press Shift+Tab or click the Decrease Indent Position button to raise a subtopic to a higher level.
- Move a topic higher or lower in the outline: Drag the paragraph selection handle up or down in the note.
- Select a topic and its subtopics: Click the paragraph selection handle.
- Collapse or expand a topic's subtopics: Double-click the paragraph selection handle. You can also press Alt+Shift+minus sign to collapse or Alt+Shift+plus sign to expand subtopics.
- Select topics at different levels: Right-click the paragraph selection handle, choose Select, and choose a level on the submenu. Select all topics on the same level when you want to format text. For example, to italicize all level-3 subtopics, select them and click the Italic button.
Create and Construct an Outline

1. Create the initial outline by entering a six-item list.

2. Select the list and press Ctrl+/ (or click the Numbering button on the Home tab).

3. Drag over parts of the second and third item so that all or part of each item is selected.

4. Drag the paragraph selection handle to the right to indent items 2 and 3 in the outline.

5. Drag the paragraph selection handle on item 1 downward until item 1 becomes item 4 in the outline.

6. Double-click the paragraph selection handle on item 4 to collapse its subtopics.

7. Right-click any paragraph selection handle in the outline, choose Select, and choose All at Level 2.

8. Press Ctrl+B to bold all level-2 topics in the outline.

9. Double-click the paragraph selection handle on item 4 to expand its subtopics.

Try This!

Drag the paragraph selection handle upward and to the right. When dragging this handle, you can indent and move a topic in an outline.
Date- and Time-Stamping Notes

Date- and time-stamp notes to record when they were written. Or use the date- and time-stamping commands to insert the date, time, or date and time in the middle of a note you’re writing.

Date- and Time-Stamp a Note

1. Click the Insert tab.
2. Click Date.
3. Click Time.
4. Click Date & Time.

To date- and time-stamp notes, go to the Insert tab and click a button: Date (or press Alt+Shift+D), Time (or press Alt+Shift+T), or Date & Time (or press Alt+Shift+F).

Tip

To insert your name, the current date, and the current time, right-click and choose the last option on the shortcut menu.
Placing Files and Printouts in Notes

OneNote offers three commands for importing files into a notebook. These commands are available on the Insert tab:

- Attach File: Embeds files with a notebook. After you attach a file, double-click its shortcut icon to open it.
- File Printout: Inserts files so that you can read and search (but not edit) their content in OneNote.
- Scanner Printout: Imports scanned paper documents and digital photos into OneNote so that you can view their content.

Attach a File to a Note

1. Click the Insert tab.
2. Click Attach File.
3. Select the file in the Choose a File dialog box (Ctrl+click to select more than one file).
4. Click Insert.

Try This!

Move the pointer over the attached file icon. A ScreenTip shows you the file’s name, when it was last modified, the folder from which it was originally copied, and its size.

See Also

“Creating Links to Web Pages and Files” on page 87 to learn how to link a note to a file so that you can open and edit a file by clicking its link in OneNote.
Inserting a File Printout

Insert a file printout to copy a text file into OneNote and retain all the text formatting. After you insert the text file, you can read and search it, but not edit it.

Besides inserting the file text, OneNote inserts a shortcut icon to the file and a link to the file. You can double-click the shortcut icon or click the file link to open the file in its default application.

To insert a file printout, go to the Insert tab and click the File Printout button. Then select a text file in the Choose a File dialog box and click the Insert button.

Insert a File Printout

1. Click the Insert tab.
2. Click File Printout.
3. Select the file in the Choose Document to Insert dialog box.
4. Click Insert.
5. Double-click the file’s shortcut icon to open the file in its default application.

Try This!

When you installed Microsoft Office 2010, you installed a virtual printer called Send To OneNote 2010. You can use this virtual printer to make a file printout of any file, starting in any application. Printing this way doesn’t get you a shortcut icon and link to the file along with the printout, but you can choose which pages of the file to bring into OneNote. Follow these steps:

1. Choose the application’s Print command (or press Ctrl+P).
2. In the Print dialog box, choose the Send to OneNote 2010 printer.
3. Choose a print range.
4. Click OK.
5. In OneNote, in the Select Location in OneNote dialog box, select the page where you want to file printout to go, and click OK.
Use the Scanner Printout command to scan paper documents from a scanner or photos from a digital camera and place an image of the document or photos in OneNote.

To start, make sure that the scanner or digital camera is plugged into one of your computer's USB ports. Then go to the Insert tab and click Scanner Printout. The Insert Picture from Scanner or Camera dialog box appears. Choose a device and resolution setting, and click Insert to begin scanning or Custom Insert to select more scanning options.

**Insert Content from a Scanner or Digital Camera**

1. Click the Insert tab.
2. Click Scanner Printout.
3. In the Insert Picture from Scanner or Camera dialog box, select a device and resolution.
4. Click Custom Insert.
5. In the Scan Using dialog box, click Preview.
6. Click Scan.

**Tip**

You can change the size of a scanned image. Move the pointer over the lower-right corner; when you see the two-headed arrow, click and start dragging.

**Tip**

Select Add Pictures to Clip Organizer in the Insert Picture from Scanner or Camera dialog box to place the image in the Microsoft Clip Organizer. The Clip Organizer is an application for storing and editing images. To open it, click the Start button, choose All Programs, choose Microsoft Office, choose Microsoft Office 2010 Tools, and choose Microsoft Clip Organizer.
Placing Images in Notes

On the Insert tab, OneNote offers two commands for placing images in notes:

- Picture: Insert a JPEG, PNG, TIFF, or other digital image.
- Screen Clipping: Take a screen clipping, a screen shot of part of any open window on your computer screen.

Pictures and screen clippings are images. You can change the size of a picture or screen clipping by dragging its lower-right corner.

Insert a Picture

1. Click the Insert tab.
2. Click Picture.
3. In the Insert Picture dialog box, select a picture.
4. Click Insert.

Tip

Ctrl+click pictures in the Insert Picture dialog box to select and insert more than one picture.

Inserting a Picture

To insert a picture, go to the Insert tab and click Picture. The Insert Picture dialog box appears. Select a picture and click Insert.
Taking a Screen Clipping

To capture part of an open window on your computer as a screen shot, take a screen clipping. For example, capture part of a web page or application screen in a screen clipping.

Before you begin, display the item that you want to capture on your screen. For example, to capture part of a web page, display the web page in your browser. Then switch to OneNote, go to the Insert tab, and click Screen Clipping (or press Windows key+S). You return to the application you were in previously. Drag the pointer across the part of the screen you want for your clipping. You return to OneNote, where the screen clipping appears in a note along with a notice saying when it was taken (a URL appears as well if the clipping was taken from a web page).

Take a Screen Clipping

1. Display the web page, file, or application window you want to capture.
2. In OneNote, click the Insert tab.
3. Click Screen Clipping.
4. Drag on the screen to define which portion of the screen you want to capture.

Tip

If you want to take a screen clipping of the OneNote screen, display the screen and press Windows key+S or right-click the OneNote icon in the notification area and choose Create Screen Clipping. You can't do it by clicking the Screen Clipping button on the Insert tab.

The other way to create a screen clipping is to right-click the OneNote icon in the notification area of the taskbar and choose Create Screen Clipping. After you drag to capture part of the screen, the Select Location in OneNote dialog box appears so you can choose a page for the screen clipping.
Constructing Math Equations

Writing and drawing math equations can be difficult, and to make constructing equations a little easier, OneNote offers two techniques for putting equations in notes.

One technique is to construct an equation using the Equation Tools Design tab. On the Insert tab, click the Equation button. Then, on the Equation Tools Design tab, use the tools, symbols, and structures to fashion an equation:

- **Tools**: Offers commands for inserting and constructing equations, as well as converting between one- to two-dimensional displays.
- **Symbols**: Provides a gallery of symbols to insert in equations.
- **Structures**: Provides a gallery of components, including fractions, integrals, and radicals, to insert in equations.

The other technique is to draw the equation in the Insert Ink Equation dialog box. Use this technique to write simple equations. On the Draw tab, click the Ink to Math button to open the Insert Ink Equation dialog box. After you click the Insert button in this dialog box, OneNote converts your hand-drawn equation to text.

Use Equation Tools to Construct an Equation

1. Click the Insert tab.
2. Click Equation.
3. Click Fraction and choose the first fraction in the gallery.
4. In the fraction placeholders, enter 4 and 3.
5. Click to the right of the fraction and then click the Multiplication Sign.
6. Type 6 on your keyboard.
7. Click to the right of the number 6 and click the Equal Sign.
8. Type 8 on your keyboard.

Try This!

In the Equation Tools Design tab, click Equation and choose a common equation on the gallery as a starting point for constructing your equation. You can also choose a common equation starting on the Insert tab by opening the gallery on the Equation button.
Construct an Equation in the Insert Ink Equation Window

1. Click the Draw tab.
2. Click the Ink to Math button.
3. Using the mouse, a pen device, or your finger, draw the following equation: \( 4 + 1 = 5 \).
4. Look at the Preview area to see whether OneNote interpreted your drawing correctly.
5. Click Insert.
Recording Audio and Video Notes

If your computer is equipped with audio and video capability, you can record audio and video notes and play back the recordings on the Audio & Video Playback tab.

What’s more, OneNote links recordings to notes you take while a recording is being made or played back, and you can click these playback links to revisit different parts of a recording. To play back your supervisor’s speech at a staff meeting, for example, you can select the note that you wrote while your supervisor spoke and then click the playback link attached to the note. In this way, you can write notes about meetings and events, and use your notes as a means to return to the parts of meetings and events that you recorded.

To record an audio or video note, go to the Insert tab and click the Record Audio or Record Video button. The recording starts and the Audio & Video Recording tab opens. You can click the Pause button to pause the recording. Any notes you type during the recording are linked to the recording.

To play back an audio or video recording, open the Audio & Video Playback tab, select a recording, and click the Play button. If you wrote notes about the recording, click a note or a paragraph in a note and then click its playback link to hear or view the portion of the recording that was made while you wrote the note.

The Audio & Video Playback tab offers commands for playing, pausing, stopping, rewinding, and fast-forwarding.

To write notes about a recording you already made, play the recording and start taking notes. The notes you take will be linked to the recording.

---

Record an Audio or Video Note

1. Click the Insert tab.
2. Click Record Audio or Record Video.
3. Click Pause to pause the recording.
4. Click a different part of the screen to begin writing descriptions of the recording there.
5. Click Pause again to resume recording.
6. Write several descriptive paragraphs about the recording as it occurs.
7. Click Stop.

---

Try This!

The Audio & Video Playback tab also offers a Record Audio and Record Video button. Click one of these buttons to record another audio or video note on the page.
Recording Audio and Video Notes

Taking Notes to Another Level
Play Back an Audio or Video Note

1. Click the Audio & Video Playback tab.
2. Select the audio or video note.
3. Click Play on the ribbon.
4. Click Pause.
5. Click the Play button next to a paragraph or note to play one portion of the recording.
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