

Top Ten Tips for OneNote®

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Top Ten Tips for OneNote

1. Password Protect Your Sections

You may want to share your OneNote notebook with colleagues but not want them to have access to every section within the notebook. You can put a password on the sections you want to keep confidential. Just right mouse click on the section name and then select Password Protect This Section. Enter your password and then click Set Password. If you click Password Options at the bottom of the task pane, you can modify the password settings (scroll down to the Passwords section), such as making the password lock kick in as soon as you click off the section or automatically after a certain period of time with no activity. Note that the Search function will not search password protected sections unless they are unlocked first.

2. Use Section Groups to Organize Your Notebook

Section Groups allow you to create a section hierarchy within your notebook. It can help for organizational purposes, particularly when you have many similar sections. For example, if you have a Notebook for organizing your holiday party plans each year, you might create a Section Group called Budget and then have a separate section for each year of the holiday party budgets underneath that Section Group. To create a Section Group, just right mouse click on the name of a section, then click New Section Group. A new group tab will be added to the right of the regular notebook section tabs. You can then click and drag sections into that new Group Section or you can click on the Group Section tab and then click the plus symbol at the top to insert new sections directly into that Group. To get back to the regular section tabs, click the round arrow to the left of the Section Group tab name.

3. Audio Visual Capabilities of OneNote

OneNote has some wonderful capabilities for recording audio and video. Just go to the Insert tab and then click Record Audio or Record Video. One of the best parts of this feature? When you are recording audio (such as a meeting or lecture), if you type notes while doing that recording, when you play back the audio, OneNote will highlight the text and show you where during the audio you were while that audio was being recorded. So handy for taking minutes!

4. Capturing Images in Conjunction with Microsoft Office Lens App

There is a very useful app that Microsoft has created called Office Lens. This App will turn your phone into a portable scanner. It's very well integrated into Microsoft Office and allows you to take pictures of business cards, whiteboards, documents and photos and have them automatically placed into your OneNote notebooks. This app does tremendous things like straighten crooked pages and fix the "curve" of book edges and you can save to MULTIPLE applications all at one time. You can download this app from the Google Play or iTunes store.

5. Capture Text from an Image

Once you have those images scanned into your OneNote notebook, you don't want them to just sit there. OneNote has a fabulous feature you might never have noticed. If you right mouse click on an image that has text in it, you can choose Copy Text From Picture and it will convert the picture text to editable text that you can place in a text box within your notebook. You'll need to proofread it because it isn't flawless, but it's often pretty darn good, including being able to read printed handwriting!

6. Translate Documents on the Fly

On the Review tab of OneNote, you'll find the Translate button. Just select the text you would like to translate, and then right mouse click on it and you will see Translate on the contextual menu. Otherwise, you can click Translate on the ribbon bar. A Research task pane will open up where you can select the To and From languages you want to translate. After the text has been translated, it will offer you the option to insert the text into your document.

7. Integrating OneNote with Office

If you maintain a OneNote notebook with documents gathered from many sources, you can use OneNote to journal your thoughts on the various documents with Linked Notes. For example, if you have a PowerPoint document open, you can open a Linked Notes window from the Reviewing tab in OneNote. Then whichever slide you click on in the PowerPoint presentation, when you go back to your OneNote docked taskpane and type your notes, it will track where you were when in the PowerPoint (or other document) while you were typing. It will actually create a link next to the typed note that allows you to go directly to the other document.

8. Collaboration in OneNote

Your OneNote notebook allows you to collaborate with others. Click on File, then on Info. Beneath the notebook name, click Invite people to this notebook. If you see Share on Web or Network, it means your Notebook is saved on your local drive. You will need to move it to a new location (such as OneDrive or Sharepoint). When you Invite People To This Notebook, it will ask you to type a name of someone in your organization or an email address. To the right of that field, you will see a person icon which will bring up your global address book. There is also a drop down field to change the share options from Edit to View permission. You can require that they log in prior to getting access to the file as a security measure. OneNote will track who the document has been shared with. Alternatively you can get a link for sharing or share your notebook with an online meeting that is currently taking place.

9. Using Tabs to Organize Yourself in Your Notebook

On the Home ribbon, Tags allow a call to action such as followup with someone or mark something as important or list something as a question. Click the dropdown on the list of tags to see the full list. At the bottom of that list, you can add your own custom tags. To search for tags, click Find Tags. The Tags Summary window will allow you to see all the tags being used in the notebook. You can group them by name of the tag, section they are in, page title, date or text. At the bottom of the Tag Summary pane, you can modify what is being searched (notebook, section, page, etc.). You can create a Summary Page. This creates an instant list of the Tagged Items in your entire notebook, grouped however you had it filtered on the Tags Summary task pane. Super useful for gathering To Do Lists and staying on top of all the things you wanted to get done!

10. Add Meeting Details Into Your OneNote Notebook

If you are using a OneNote notebook to track activity on a committee, you might find it useful to add meeting details from Outlook into your notebook. You can do this easily from the Home Ribbon by clicking Meeting Details and then selecting the meeting on the calendar dropdown. Note that this pulls from YOUR calendar, not your boss's calendar. But it adds in ALL the information from the meeting including who is invited, any attachments and any text in the body of the calendar appointment. When it does this, it is making a COPY of the information, which means even if you delete the appointment from your calendar or delete the attachment from your appointment, you will still have that information and file in your OneNote notebook.

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