Unitec Institute of Technology

OneNote

To complement the Session provided by IMS Training

For further assistance email IMS Trainer (imstrainer@unitec.ac.nz)

Contents

OneNote 2013

OneNote is a Microsoft application that enables you to add information in a structured form for easy editing, across devices and sharing with permission controls. It is a great collaboration tool.

A future project will be launching **OneNote Classroom Creator**, this will enable Lecturers to share resources with students, with a teacher/student permission and views. OneNote 2013 is able to be shared with Students, but does not give the different views, only permissions to edit or not.
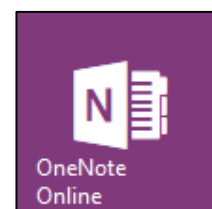
Starting with OneNote

On Unitec computers, under **Start**, **All Programs**, **Microsoft Office 2013** *folder*, select **OneNote 2013**.

When you open this desktop version, a **Send To OneNote** window opens as well. This is helpful for adding content to OneNote. If it does not open, click **Windows button + N**, to open.
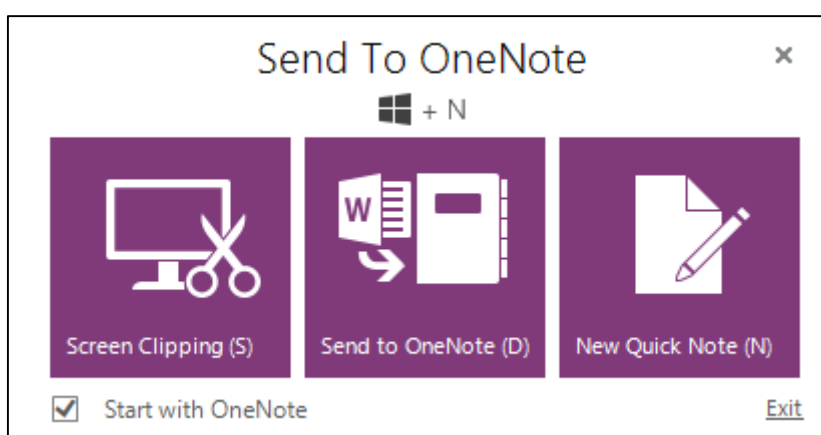
In **Office 365**, use the Grid (top left) and select **OneNote Online**.

With **OneNote Online** (Office 365) you can view, edit and add pages to existing notebooks. To start a new Notebook, create in Office 365 **OneDrive**.

Getting familiar with OneNote

In OneNote there are three components, used to organise your content:

Notebooks – view them like the physical notebook. (Examples, a notebook on Professional Development and notebook on Unitec Kickstart).

Sections – view them like tabs for each chapter or topic, within the Notebook. (Example is Outlook Training in Professional Development or IMS Technology in Unitec Kickstart).

**Pages** – within the sections, pages have the content/detail. (Example is Outlook Intermediate, Outlook Advanced or IMS Heat, OneDrive – Unitec NZ).

Name a Notebook	Name a Section	Name a Page	Name next Pages
Professional Development	Outlook Training	Outlook Intermediate	Outlook Advanced Outlook 365
Unitec Kickstart	IMS Technology	IMS Heat	OneDrive Unitec NZ

Creating a new OneNote

Important: Take care in renaming Notebooks you have shared, links will be broken and can cause sync issues. For this reason,

In **OneNote 2013**. **File**, then **New** to start a new notebook. A list of places to save opens:
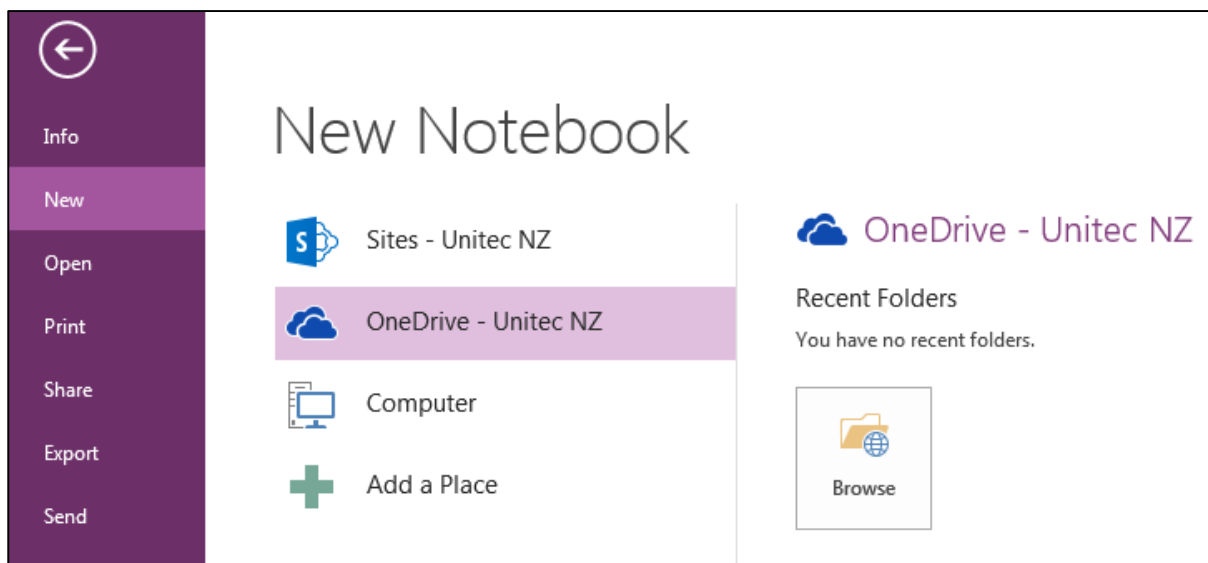
OneDrive – Unitec NZ is a location online which is our place to save our Unitec content (replaced S Drive). The default is private. With OneDrive – Unitec NZ you can keep this private or change permissions to share.

Computer is local to the machine and is not recommended, there is no backup and files are not accessible off campus. If the computer crashes your files are lost.

Note: Current Notebooks are located under My Notebooks, when you first open OneNote 2013.

Sharing and Setting permissions in OneNote 2013

With OneNote you can collaborate with others. This option is called Share. When you share, an email is sent with a link to the OneNote Notebook.

To Share in 2013 use **File**, then **Share** (invite, comments is optional and default permission is **Can edit** Can edit ▾). If you keep ticked the **Require user to sign in before accessing document** tick box, then this protects the document from being shared with others you have not given permission to.
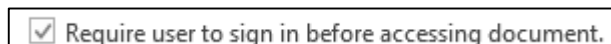
Finally, select **Share** button to send.

To change permissions, return to **File**, then **Share** and you can view a list of current permissions, under **Shared with**, which you can edit.
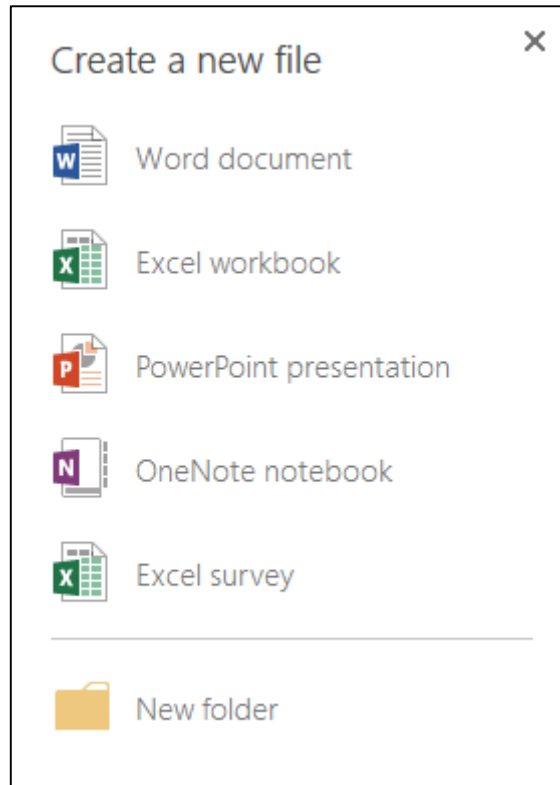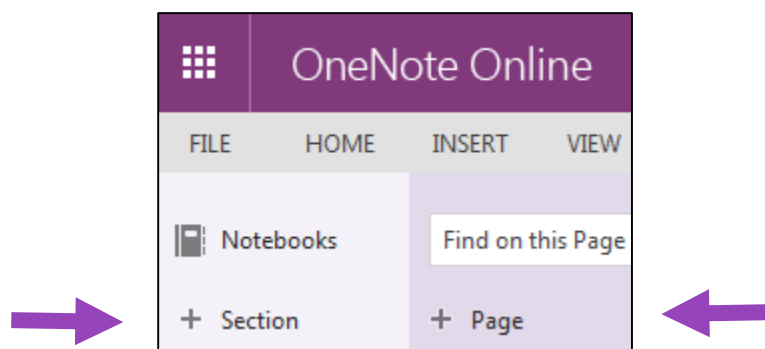
Creating a new OneNote in Office 365

In Office 365, to start a new OneNote Notebook, you need to start at OneDrive.

In **Office 365**, use the **Grid** (top left) and select **OneDrive.**

Click the [⊕ New] **New** button and select **OneNote notebook** from the drop down list.

Now within **OneNote Online** you can add new **Section** or **Page** using the buttons on the page.

## Sharing and Setting permissions in OneNote Online

With OneNote you can collaborate with others. This option is called Share. When you share, an email is sent with a link to the OneNote Notebook. This is useful if you want to collaborate with others, before saving to H or J Drive.

In an open Notebook, select **File**, then **Share** on the left menu, then **Share with People** (right).

In the screen that opens, you can **Invite People**, change the permissions if necessary (default is **Can edit** [Can edit ▼]), comment is optional, If you keep ticked the **Require sign-in** tick box, then this protects the document from being shared with others, you have not given permission to. Finally select the **Share** button to send.

Use Meeting Notes in Outlook 2013

Click the **Meeting Notes** button. Then indicate which option you would like:
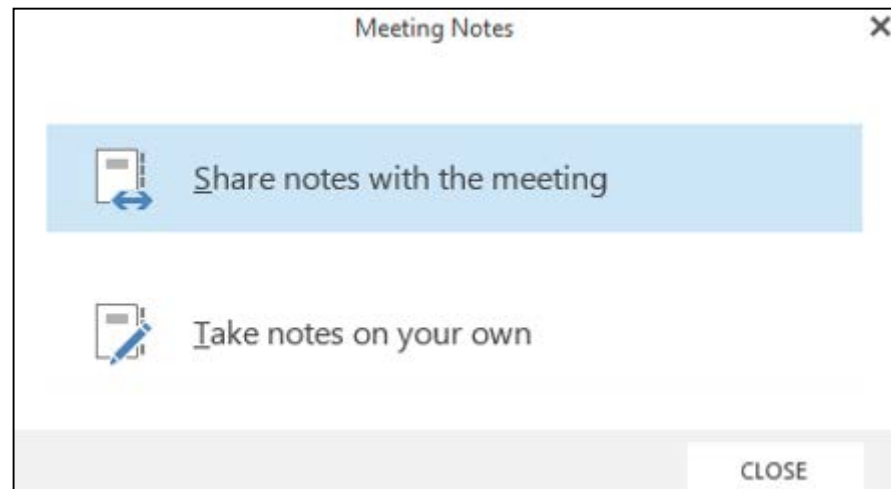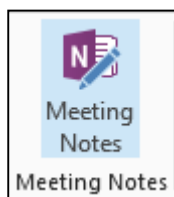
You can use an existing OneNote notebook, or create a New OneNote notebook.

When the meeting invite is sent, recipients get a link to Join the Meeting, plus a link to view the meeting notes (if you choose the Share notes with the meeting). Check the permissions in OneNote for that Notebook, currently permissions do not appear to be automatic and you need to share a whole Notebook, then restrict sections by right clicking on section name and select **Password Protect This Section**.
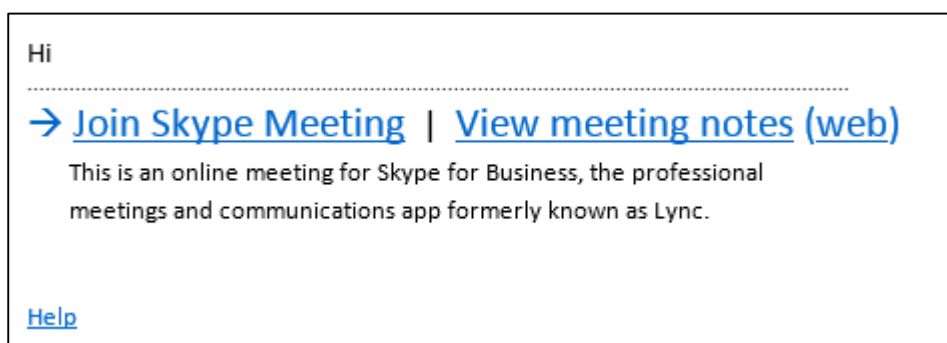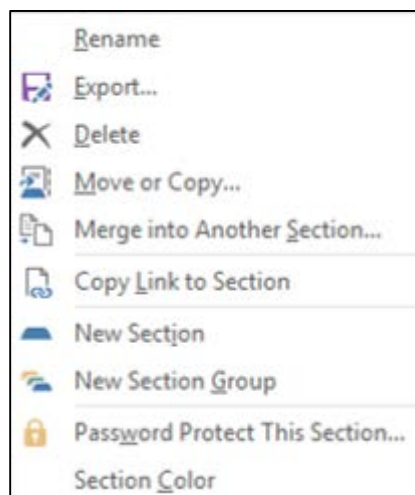
Screenshots

On the **Insert** *tab* in a new item (email/appointment). A screenshot can be added to a Notebook Page, using the **Screenshot** *button* in the **Illustrations** *group*. To limit the size of the screenshot, use the **Screen Clipping** *option* at the bottom of the drop down. This will open the last opened screen and enable you to draw around a selection to add into a message, task or appointment. **Note:** This is also available in Outlook, Word, Excel and PowerPoint.

Note: The first time you use OneNote Screenshot feature, you need to close and reopen OneNote. This configures the application to use that feature on that computer.
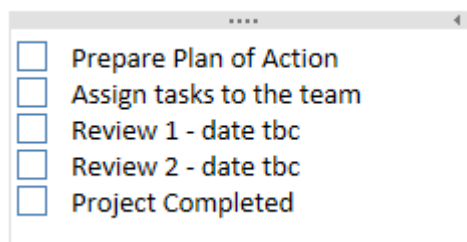
Checklists

Sometimes you need to ensure things are completed, preparing a list with tick boxes allows you to mark off things, as you complete them. Use Checklists in OneNote Pages. Create your own or start one from Template.

Create a checklist

1. Click into the place on the page you want the checklist to appear.
2. On the **Home** tab, select **To Do Tag** *button* in the **Tags** *group*.
3. Beside the checkbox that appears, add some text on the action to complete. Click **Enter** *key* to start a new checkbox line.

4. *Optional:* You can move the checklist around by hovering over the grey top bar, click and drag to a new location.
5. Now you can click the box to tick *or* click again to clear.
6. *Optional:* You may want to add a box around the checklist. On the **Draw** *tab*, in the **Shapes** *group*, select the rectangle. On the page using your mouse, draw from top left of the checklist to bottom right. Resize and move the rectangle by dragging the edges. With the rectangle selected you can use the sub toolbar to edit the shape and change the look of the rectangle. See topic on Tasks in Outlook Guide 2 or Tags in this guide.
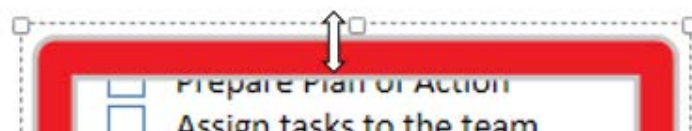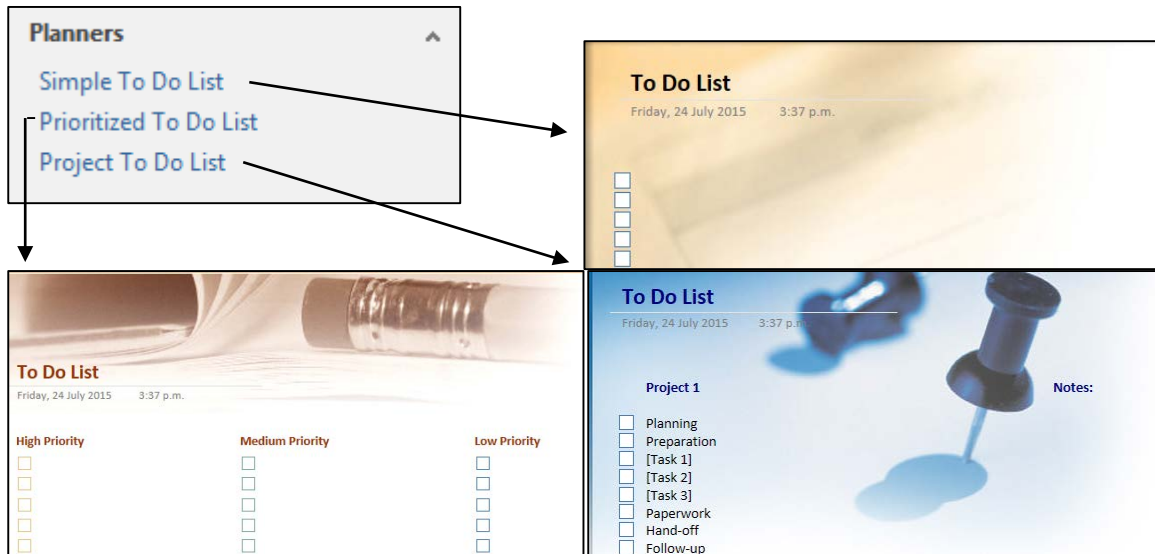
7. Optional: Add a heading to the checklist. Click above the first box (or to left, above the rectangle if you added one) and type a heading.

Use a To Do List Template

To view templates, on the **Insert** tab, click the **Page Templates** *button*, then **Pages Templates**.

Under the section **Planners** click the right arrow to find:

To Remove a template, right click on the template in the pages panel on the right and select **Delete**.

Add Files to OneNote

OneNote can keep everything on a topic in the same place, including files. There are many ways to add file content to OneNote, any text seen on the page is searchable. You can add as a **File Attachment**, add a as a **Screen Clipping** or add as a **File Printout**. **Note:** If you update the file, you need to replace the copy in OneNote.

- File Attachment
- Screen Clipping (Searchable)
- File Printout (Searchable)

Alternatively, add a link to a file in OneDrive and link to the most updated copy.

Record Audio and Video

Sometimes you need to mention or show areas of an OneNote for your audience to fully appreciate and understand what they have available. For this you can:

- Record and add Audio for listening back later
- Record and add Video for others to see you add content, highlight important things or show how to do things.

Searching and tags

In OneNote you can do a quick search or more advanced searching.

Note: Sections that are protected by password, need to be unlocked prior to being included in the search results.

Quick Search

A quick search searches all your OneNote notebooks.

1. In the *Search field* at the top right, enter text.
2. Use the drop down arrow to the right of the search box to limit the search to a page, section etc.
3. In the search results, under **Recent picks** click one to go to that location in OneNote.
4. *Optional:* Select **Set This Scope as Default**.
   Note: This option is not available for current page.
5. To close the search, click **x** right of Search Results, to close.
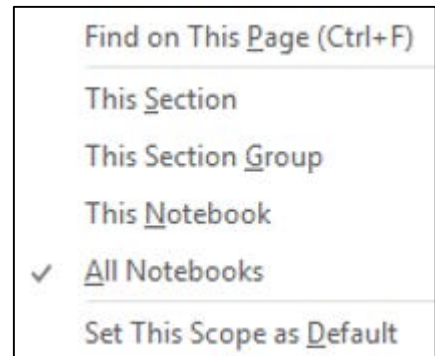
Advanced Search

To reduce search results found, search Sections or Notebooks by Titles, Sections or Date Modified.

1. In the *Search field* at the top right, enter text.
2. Click the **Pin Search Results**, found at the bottom of the search results.
3. Now you can change, where you are searching, by section or notebook. And **Sort by Date Modified**, **Title** or **Section**.
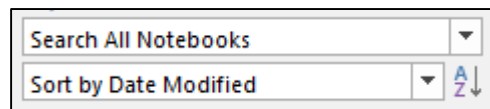
4. Optional: Use the ⬇ **Sort Ascending** *icon* to sort by alphabetical order. Click again to **Sort Descending**.
5. In the search results, click a result to go to that location in OneNote.
6. To close the search, click **x** to right of Search Results, to close.

Searching in Audio and video files in OneNote

To use this feature you first need to turn this option on. OneNote can only search your.

Note: Due to the variability of voices search may not find results. It will also take longer to search and index (automatic process that Microsoft applications use to search when a file is created).

1. Click the **File** *button*, top left.
2. Select **Options** from the left hand menu.
3. Select **Audio & Video** *option* on left.
4. Tick the bottom box on the page. **Enable searching audio and video recordings for words**.
5. Note the requirements and limitations. To proceed, select **Enable Audio Search**.
6. Click **OK**. (The link at the bottom now updates to reflect this change and it automatically searches audio in a search).
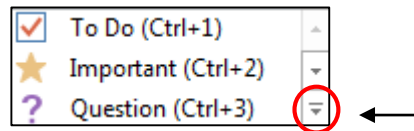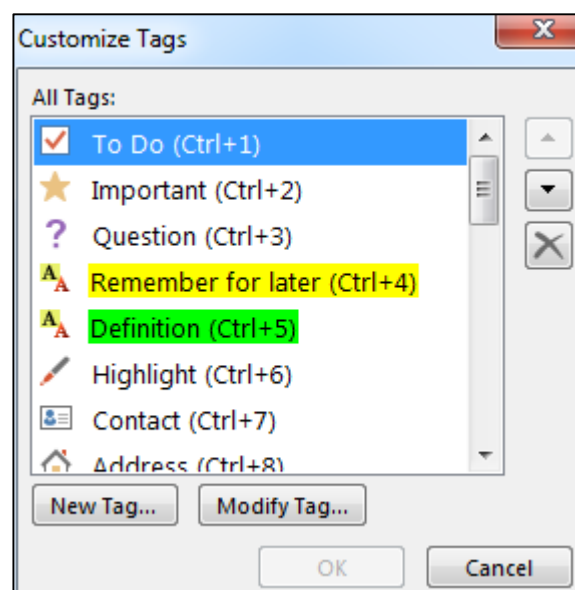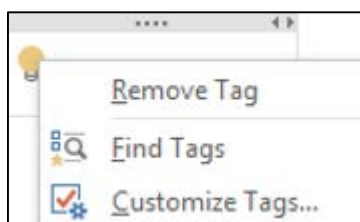
Tags

In OneNote you can create tags to find content easily. You can use the Tags given by default, modify them (for future use, not historical) or create new Tags. You can also search on existing tags.

Creating and Modifying a Tag

1. On the **Home** *tab* in the **Tags** *group*, click the bottom drop down arrow to view all Tags.

2. Select a tag from the list. The tag will appear on the page.
3. ***Optional:*** To modify a tag, select from the drop down list (or right click on an existing tag) choose **Customize Tags**. Select the tag and then **Modify Tag** *button*.

   Optional: Start a new tag. Select **New Tag** *button*. Name the tag, add a symbol, colours. Check the preview the tag, then select **OK**.
4. To delete a tag from the page, right click the tag and choose **Remove Tag** (see left image above). To delete a tag you created and will never use again, select the tag and click the delete *button* (see right hand image above).

Searching for Tags

You can locate tags easily in OneNote, by Tag Name (Idea, To Do etc).

1. On the **Home** *tab*, click the **Find Tags** *button*. This opens the Tags Summary panel.
2. In the Tags Summary panel, you can change how you see the tags grouped. By default it shows Tag name. Use the drop down arrow to change to another selection.
3. Click a tag listed to go to that tag.

Recent Notebook list in OneNote Online

In **OneNote 2013**, under **File**, **Open**, a recent notebook list appears. This list is linked to your OneNote Online recent notebooks list, (which you cannot edit directly).

Right click on any notebook you no longer want to see and Remove from the list.

This will update your OneNote Online list of recent notebooks, found when you select OneNote Online from the grid.

Mobile Apps for OneNote

Download the **OneNote** app, from either the Google Play Store (Android) or App Store (iOS devices).

Install and set up using your login followed by **@unitec.ac.nz (staff)** and your Unitec network password.

With the app, you can make **quick notes** and save to OneDrive – Unitec NZ. You can also view and make basic edits to documents held here. Files sync automatically if you have good Internet connectivity. You cannot set up **new** notebooks without Internet. To use without Internet connectivity, set up a notebook when connected, then use offline. It will sync automatically when you have Internet again. Or use Quick Notes.

Important: Remember to update your password on your mobile device, when you change your Unitec network password. This needs to be updated in the individual Microsoft apps.