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Getting Started with OneNote 2016

- **Understanding OneNote 2016 Concepts**
- **Getting Started**
- **Managing Notebooks**
- **Navigating and Viewing Notebooks**

Learning Objective: Explore the user interface, create, save, open, close and move around in OneNote 2016 notebooks, as well as select different views, and obtain Help.

1.1   Understanding OneNote 2016 Concepts

Microsoft OneNote 2016 is a program that you can use to gather, edit, store, and share note style data electronically within notebooks.

When you start OneNote 2016 for the first time, you have the option to sign in using a Microsoft account, which creates a default notebook online. An online notebook can be accessed it from other devices, as well as shared with others. Alternatively you may cancel that prompt to create a default notebook locally named *My Notebook*, which may be shared later if desired. Other notebooks may also be created.

Each notebook can be organized into sections, subsections, pages, and subpages allowing you to organize notes as you like. A wide variety of note style data can be inserted in notebooks, which may be quickly located at a later time using search tools, as well as may be shared with other users, and integrated with other Office applications.

Content Types

You can store a wide variety of data within notebooks including: text, images, audio, video, links, drawn shapes, tables, equations, web content, as well as objects and attachments from other applications. Each piece of data is stored in a *note container*, which may be moved, resized, and deleted as required.

Organization and Navigation

You can organize a notebook anyway you choose using sections (some of which may be grouped), pages, and subpages. Basic navigation can be performed by clicking the desired sections and pages to display the associated data within the current notebook, as well as by using the *Notebook Pane*.

Searching and Tagging Data

You can quickly locate data within notebooks by performing a quick search, which involves typing a search phrase to locate specific text matches. Such a search can also locate audio and video content, although those recordings will need to be of satisfactory quality. If desired, you can also change the scope of a search, for example, to search within a specific notebook, as opposed to all that are open. Further you can also tag data on which you may search for tagged items to locate them.

Share to Collaborate

OneNote 2016 notebooks may be shared to allow other users access for collaboration, or as a way to access a notebook when you do not have access to your normal computer. Such functionality may be established from the outset, or applied after a notebook has been populated. Multiple users of a shared notebook will receive other user's updates automatically, although this synchronization may be disabled if desired.

Integration with Other Programs/Applications

There are a variety of integration tasks that may be performed to leverage content and data from web pages and Office applications and documents, such as sending notebook pages to Word, creating and synchronizing Outlook tasks (from OneNote), e-mailing notebook pages, and printing PowerPoint presentations to OneNote (to name a few).

1.2   Getting Started

To begin using OneNote 2016, or any other software application, you must first launch it. When you launch an application, program files are loaded into the computer's memory. After launching OneNote, the application window appears, along with the name of the currently active notebook. In the example below, the notebook, which is stored locally is named *My Notebook*.

When you have finished using an application, you need to close it. When you close an application, program files are closed and cleared from the computer's memory.

PROCEDURE

Launching Microsoft OneNote 2016

1. If using Windows 10, click in the **Start** menu search box, type **OneNote 2016**, and then select **OneNote 2016** from the results.

    - OR -

    If using Windows 8 or Windows 8.1, from the Start screen, type **OneNote 2016**, and then click the **OneNote 2016** icon.

    - OR -

    If using Windows 7, click the **Start** button, point to **All Programs** > **Microsoft Office 2016**, and then select **OneNote 2016**.
   *A window prompt appears providing the option to connect to online storage.*

2. To connect to online storage, click the **Sign In** button, enter the required Microsoft account details, and then click the **Sign In** button.

    - OR -

    To cancel connecting to online storage (to work locally), press **ESC**.
    Regardless of the above path chosen, the application window appears with a default notebook if it is the first time OneNote 2016 has been launched.
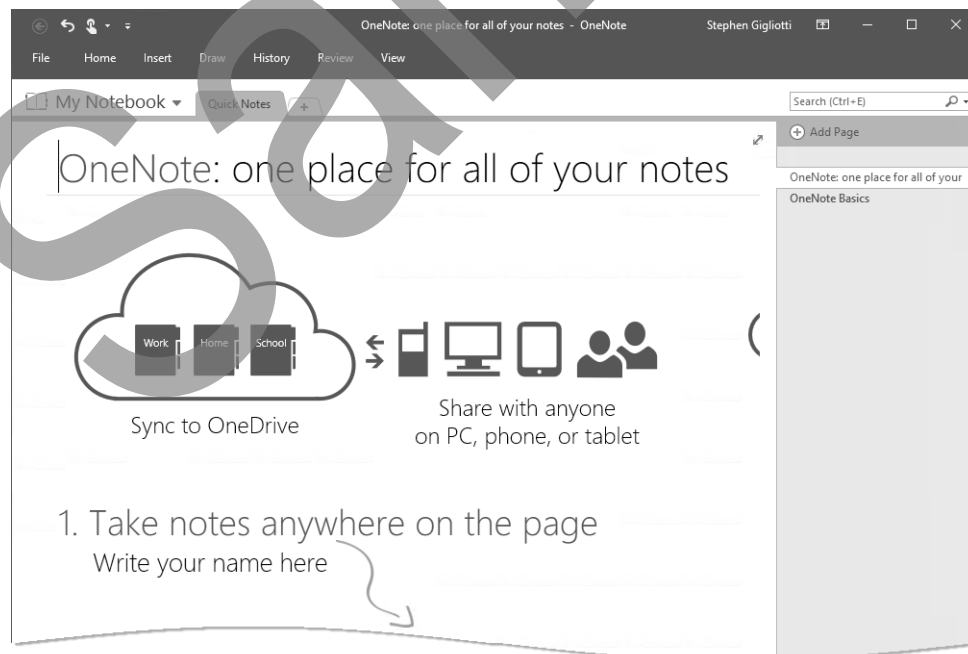
PROCEDURE

Closing Microsoft OneNote 2016

- Click the OneNote application **Close** ☒ button, or press **ALT**+**F4**.
 *The arrangement of open notebooks will be preserved.*

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Exercise – Launching and Closing Microsoft OneNote 2016

The purpose of this exercise is to learn how to launch and close Microsoft OneNote 2016.

1. From the Windows 10 Desktop, click in the Start menu search box, type **OneNote 2016**, and then click the **OneNote 2016** icon that appears.
   The following window prompt appears.
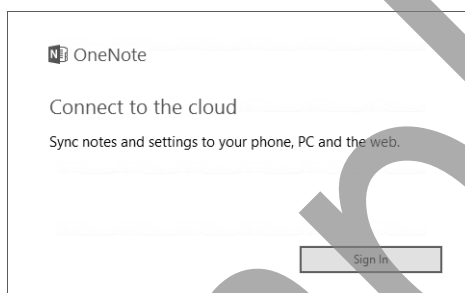
2. Press **ESC** to cancel the prompt to connecting to online storage.
   Your screen will appear as follows.
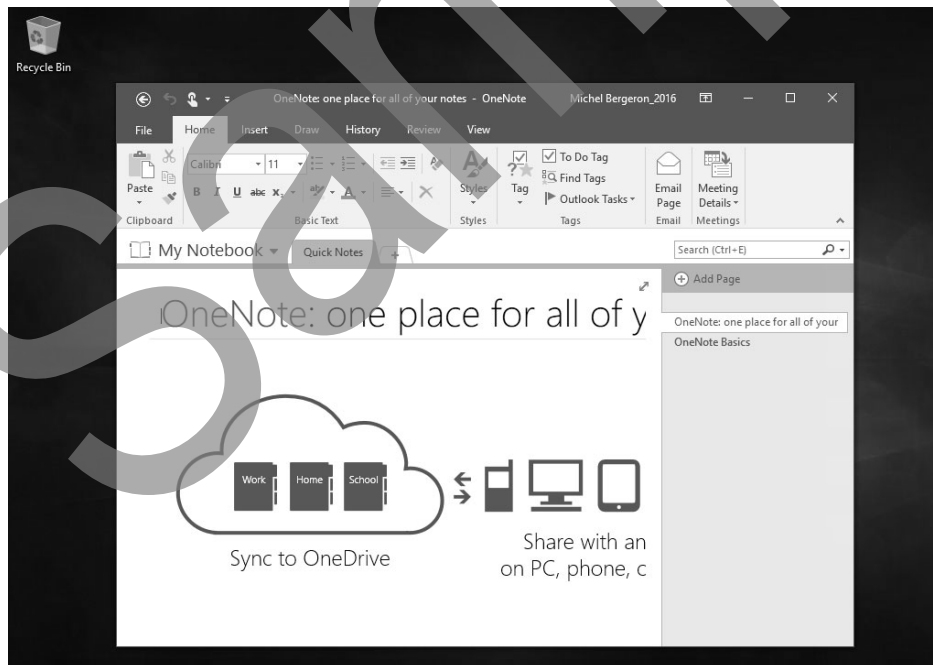
3. Click the **Close** ☒ button to close OneNote 2016.

4. Re-launch Microsoft OneNote 2016.

5. Resize the Microsoft OneNote 2016 application window to cover the Desktop.

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Identifying Screen Elements

When OneNote is open, you use some parts of the window to control the position, size, and shape of the application window. You use other parts of the window to display different notebooks, sections, and pages. The following illustration identifies several window elements.

File tab — *Clicting the* ▮File▮ *tab opens the Backstage view where you can create, save, send, share, open, and print notebooks. You can also change Microsoft Office and OneNote options, obtain Help, and close OneNote.*

Quick Access Toolbar — *The Quick Access Toolbar provides access to often-used commands like Back, and Undo. It also allows more commands to be added.*

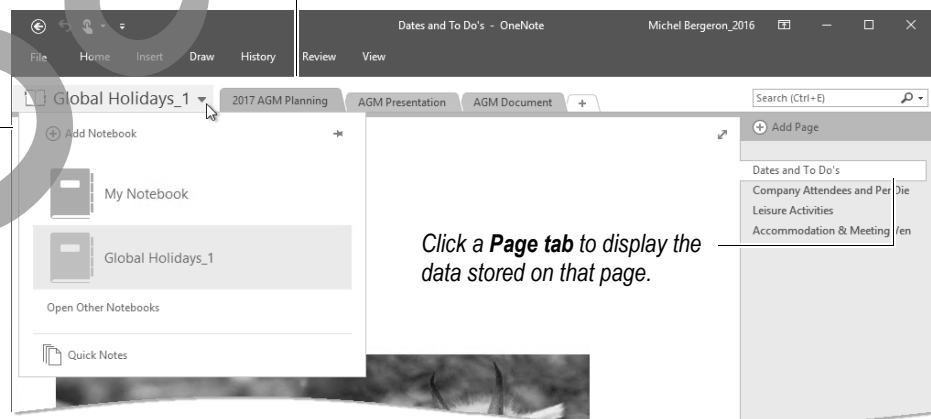*Title bar* — *The title bar at the top of each window displays the application and the current notebook name.*

Ribbon Tabs — *Primary means of access to OneNote commands. The Ribbon is organized into a three-level hierarchy of tabs, groups, and buttons (which represent the commands).*
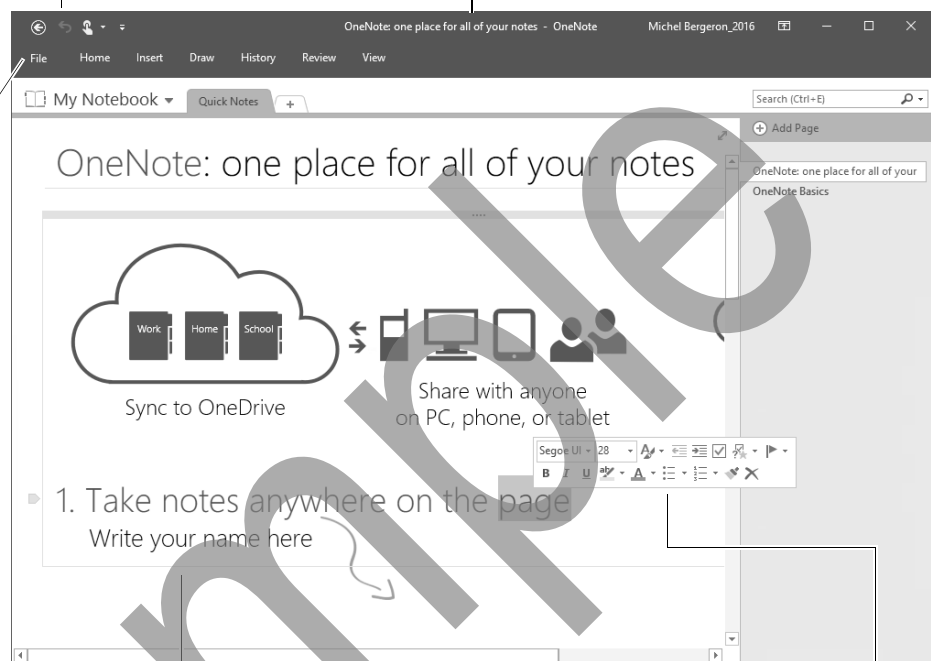
Note Container — *A floating object that holds data.*

Mini toolbar — *This floating semi-transparent toolbar appears automatically above selected text, and provides access to frequently used text formatting commands.*

Notebook Pane, Sections and Pages

*Click a **Section tab** to obtain access to the pages within the section.*

*The **Notebook Pane** allows you to navigate between all open notebooks.*
If it is pinned (not shown) to the application window, you can also navigate to a notebook's sections and pages by clicking the desired item.

*Click a **Page tab** to display the data stored on that page.*

Contextual tabs — *Appear on the Ribbon in addition to the standard tabs when certain document elements are selected. For example, the Table Tools contextual tab appears when a table is selected. Contextual tabs contain groups and buttons specific to the object selected.*
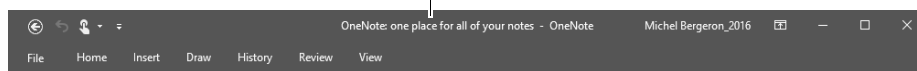
Exploring the Ribbon

When OneNote 2016 is started, the *Ribbon tabs* are visible across the top of the window, with the Ribbon itself minimized by default.

The Ribbon replaces the Menu bar and toolbars from previous Microsoft Office suites and offers expanded content, including buttons, galleries, and dialog box content. The tabs on the Ribbon are task-oriented. The groups organized under each tab deal with subtasks. Command buttons in each group carry out a command or display a menu of commands.

When the mouse pointer is positioned over a command button, a *super tooltip* appears displaying the command name, and in many cases, its shortcut key and an explanation of how to use the command.
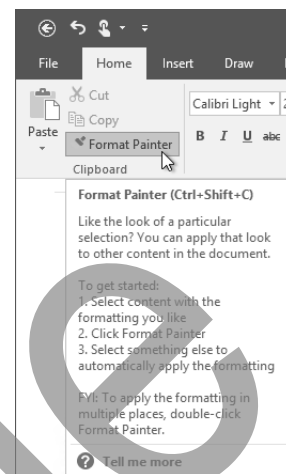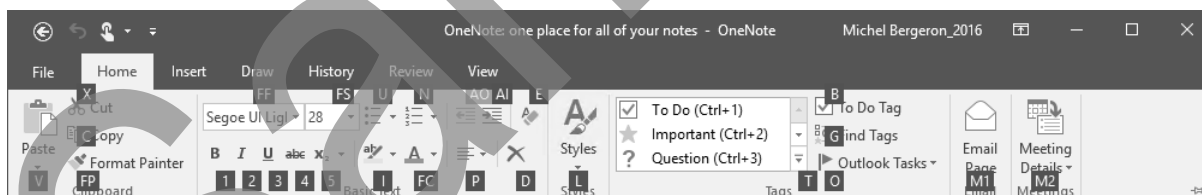
PROCEDURE

Selecting Ribbon Commands

- Using the mouse, point to and click the desired tab, and then click the desired command button.

    - OR -

    Using the keyboard, press the **ALT** key, press the letter or number key associated with the desired tab, and then press the letter or number key associated with the desired command. E.g., press **H** to select the *Home* tab, and then press **1** to apply bold.

- As required, press **ESC** to back up or cancel the keyboard selection of commands.

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PROCEDURE

Pinning and Minimizing the Ribbon

- To pinned the Ribbon (to show Ribbon tabs along with their associated groups and command buttons), click a tab, click the **Pin the ribbon** button (located on the right side of the Ribbon).

- To minimize the Ribbon, click the **Minimize the Ribbon** ⌃ .
    While the Ribbon is minimized, tab names are still visible, but groups are hidden.

    - OR -

- Press **CTRL**+**F1** to pin/minimize the Ribbon.

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Exercise – Exploring the Microsoft OneNote 2016 Application Window

The purpose of this exercise is to learn about the Quick Access Toolbar, the File tab, and the Ribbon.

1. Explore the Quick Access Toolbar.

    a. Locate the Quick Access Toolbar ⬚ at the left side of the Title bar.
        It contains four command buttons by default.

    b. Point to the four default buttons on the Quick Access Toolbar to display the button names.

    c. Click the **Customize Quick Access Toolbar** drop-down ⬚ button at the right side of the
        Quick Access Toolbar to view a list of options for customizing the toolbar.

2. Explore the Backstage View.

    a. Click the ⬚ File tab.
        The Backstage Navigation bar appears with the "Notebook Information" page displayed.

    b. Click on the various tabs beginning with **New** and continue to **Account**.
        Note that the page to the right of the Navigation bar changes with each command.

    c. Click the **Options** tab, and then click various buttons on the left side of the resulting *OneNote
        Options* screen to explore the various program settings.
        *Note that the Quick Access Toolbar command provides you with options that may be used to
        customize the Quick Access Toolbar that was explored in step 1.*

    d. Click the **Cancel** button when done.

3. Explore the Ribbon.

    a. Click a Ribbon tab.
        The Ribbon groups appear along with the Pin the ribbon button.

    b. Click the **Pin the ribbon** ⬚ button to pin the Ribbon to the window.
        The Pin the ribbon button is replaced with the Minimize the Ribbon button.

    c. Click the **Minimize the Ribbon** ⬚ button.
        The Ribbon groups disappear.

    d. Click the **Insert** tab on the Ribbon.

    e. Point to each button command in the *Images* group to display their super tooltips.

    f. Click the **Home** tab on the Ribbon.

    g. Point to various button commands in the *Basic Text* group to display their super tooltips.

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Using OneNote Help

If you have questions about working in Microsoft OneNote 2016, you can get answers from the OneNote Help system without leaving the program. Once the OneNote Help pane is open, you can browse topics or type a question directly into a search text box to locate topics. For example, you might type, "How do I share a notebook?" or "How do I take notes?"

PROCEDURE

Using OneNote Help

1. Press **F1**.
   The Help pane appears displaying common help topics.
2. Click the desired link(s) to browse topics.
   - OR -
   Type the desired search text in the *Search help* text box, and then click the 🔍 button.
- Click the ← button to navigate to a previous help topic if required.
- Click the ⋯ button, and then select **Home** to redisplay common help topics if required.

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Exercise – Using the Help System

The purpose of this exercise is to learn how to use the OneNote Help pane to locate Help topics.

1. Browse basic Help topics.

   a. Press **F1** to open the Help pane.
      A list of common Help topics is displayed.

   b. Click the **Basic tasks in OneNote 2016 for Windows** link.

   c. Scroll through the topic contents.

2. Click the ← button navigate to the previous help topic.

3. Obtain help on how to share a notebook.

   a. Type **how do I share a notebook** in the *Search help* text box.
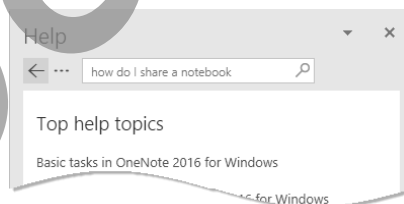
   b. Click the 🔍 button to the right of the search text.
      A list of suggested topics appears.

   c. Click the **Share a OneNote 2016 for Windows notebook with other...** link.

   d. Scroll through the topic contents.

4. Click the ⋯ button, and then select **Home** to redisplay the list of common help topics.

5. Click the **Close** ✕ button in the OneNote *Help* pane.
   The Help pane closes.

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1.3 Managing Notebooks

Notebook management involves the closing, creating, opening, and saving of notebooks. Multiple notebooks may be open simultaneously, allowing you to move and/or copy notes between them.

It may be most appropriate for users to first know how to close a notebook, as they may remain open from a previous session, or in the case of a default notebook named *My Notebook*, it is created automatically upon launching OneNote 2016 for the first time (assuming that you do not log in using a Microsoft account).

Closing Notebooks

Notebooks that are not being used may be closed to saved visual screen real-estate, as well as to lower the amount of computer resources being used, depending on the amount of data within them.

PROCEDURE

Closing Notebooks

1. Click the *Notebook Pane* drop-down button.
2. Right-click the notebook that is to be closed, and then select **Close This Notebook**.

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Creating and Opening Notebooks

Creating a notebook involves specifying where a notebook will be stored, as well as naming the notebook.

See "Sharing Notebooks" on page 59.for specific information regarding how to create shared notebooks and how to share existing notebooks.

PROCEDURE

Creating Notebooks on the Local Disk

1. Click the `File` tab, and then select **New**.
2. Select **This PC**.
   Note that a locally stored notebook may also be shared later.
3. Type a name for the notebook in the *Notebook Name* text box.
4. If required, click the **Create in a different folder** link to specify the desired location where the notebook is to be stored.
5. Click the **Create Notebook** button.
   A new blank notebook appears with one new section and an untitled blank page. The current date and time are also inserted on the blank page automatically.

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PROCEDURE

Opening Existing Notebooks from the Local Disk

1. Click the [File] tab, and then select **Open**.
2. Select a notebook from the *Recent* list, which can be categorized as *Today*, *Yesterday*, etc.

   - OR -

   Click **This PC**, click a folder name from the list of available folders, and then double-click the **Open Notebook** file.

   - OR -

   Click the **Browse** button, locate and double-click the folder associated with the notebook to be opened, and then double-click the **Open Notebook** file.

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Exporting Notebooks

Notebooks are saved automatically as you insert data and navigate within them, thus you need not worry about manually saving. However, you may want to export a particular portion of a notebook separately, create a template from an existing page, section, or notebook, or save a notebook to a different file format, such as PDF or XPS.

See "Custom Templates" on page 75 for specific details regarding how to save a page, a section, or a notebook as a reusable template.

See "Sending a Notebook Page to Word 2016" on page 86 for specific details regarding how to save a page or a section as a Word document.

PROCEDURE

Using the Export Command

1. Ensure that the notebook that contains the data to be saved is active.
2. If saving only a portion of the notebook, such as a section or a page, ensure that the desired item is selected.
3. Click the [File] tab, and then select **Export**.
4. Select the desired item to be exported, such as **Page**, **Section**, or **Notebook** in the *Export Current* list.
   Note that the item that is selected will determine some of the formats available.
5. Select the desired file type from the *Select Format* list, and then click the **Export** button.
6. Specify the folder where the content is to be saved, and specify the file name if required.
7. Verify that the correct *Page Range* option is selected, and then click the **Save** button.

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Exercise – Managing Notebooks

The purpose of this exercise is to explore the various aspects of managing notebooks, including closing, creating, opening, and saving them.

1. Close the currently open notebook, which as opened by default when OneNote was started.

   a. Click the *My Notebook* drop-down button to open the Notebook Pane.

   b. Right-click **My Notebook** in the Notebook Pane.

   c. Select **Close This Notebook**.
   The notebook closes leaving Quick Notes displayed.

2. Create a new notebook named "Global Holidays" that is stored in the C:\N161en_data folder.

   a. Click the **File** tab.
   Note that the New tab is selected by default. This is due to no notebooks being open.

   b. Click **This PC**, and then type **Global Holidays** in the *Notebook Name* text box.

   c. Click the **Create in a different folder** link, navigate to the **C:\N161en_data** folder, and then click the **Create** button.
   The notebook appears with one section and one page. Your screen will appear as follows.
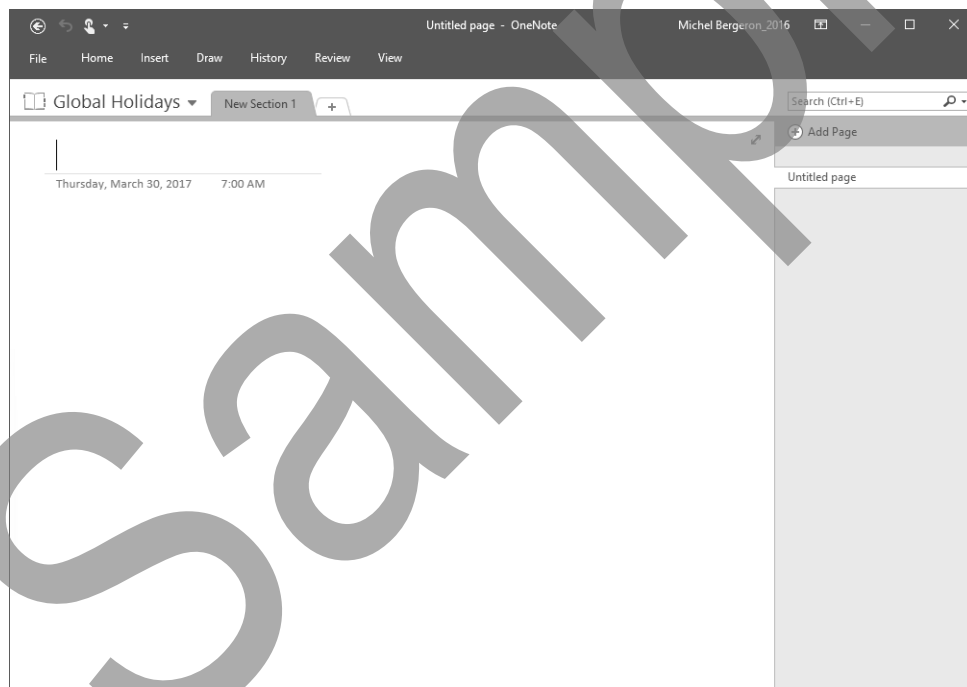
3. Open an existing notebook named "Global Holidays_1" from the C:\N161en_data folder.

   a. Click the **File** tab, and then select **Open**.

   b. Click **Browse**, and then navigate to the **C:\N161en_data** folder (if required).

   c. Double-click the **Global Holidays_1** folder in the list.
   *A OneNote file named Open Notebook appears.*

    d. Double-click the **Open Notebook** file.
        The notebook appears. Your screen will appear as follows.
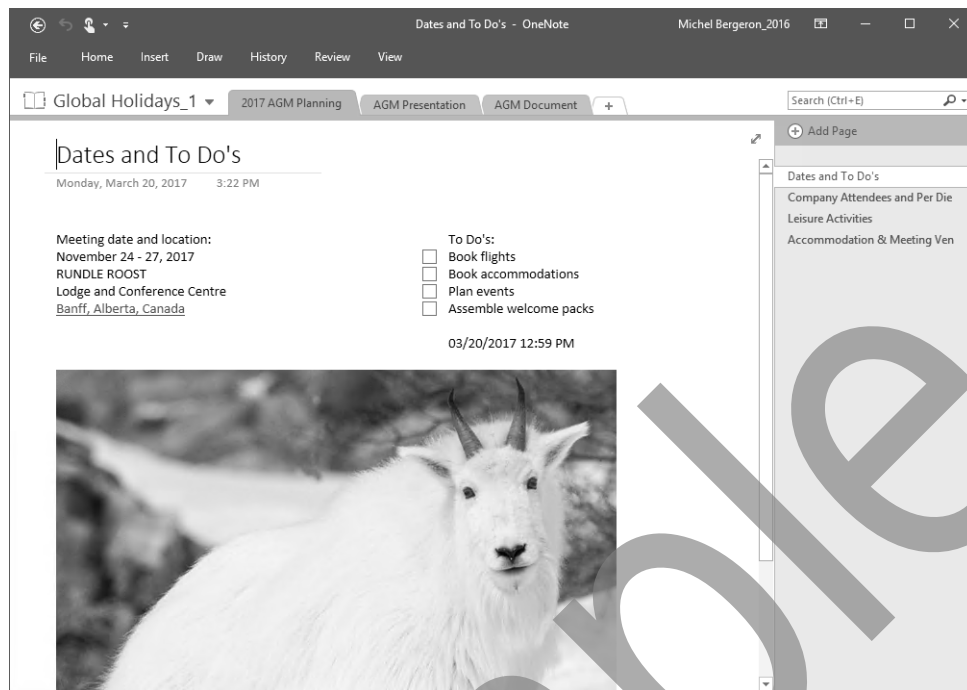
4. Export the entire "Global Holidays_1" notebook as an XPS document to the C:\N161en_data folder.

    a. Click the [File] tab, and then select **Export**.

    b. Select **Notebook** in the *Export Current* list, select **XPS (*.xps)** in the *Select Format* list, and then click the **Export** button.

    c. Ensure that the *C:\N161en_data* folder is still the current folder.

    d. Click the **Save** button to export the notebook accepting the default file name.

5. Export the "2017 AGM Planning" section of the "Global Holidays_1" notebook as an XPS document in the C:\N161en_data folder.

    a. If required, click the **2017 AGM Planning** section tab to select it.

    b. Click the [File] tab, and then select **Export**.

    c. Select **Section** in the *Export Current* list, select **XPS (*.xps)** in the *Select Format* list, and then click the **Export** button.

    d. Ensure that the *C:\N161en_data* folder is still the current folder, and then click the **Save** button to save the section accepting the default file name.

6. Open the "2017 AGM Planning" section that was saved as an XPS document from the C:\N161en_data folder.

    a. Click the **File Explorer** icon on the Taskbar.

    b. Click **Local Disk (C:)** in the Navigation pane, and then double-click **N161en_data** in the View pane.

    c. Double-click the **2017 AGM Planning** XPS document from the list.
The document appears in the XPS Viewer, or a web browser if the XPS Viewer is not installed. Your screen will appear as follows.
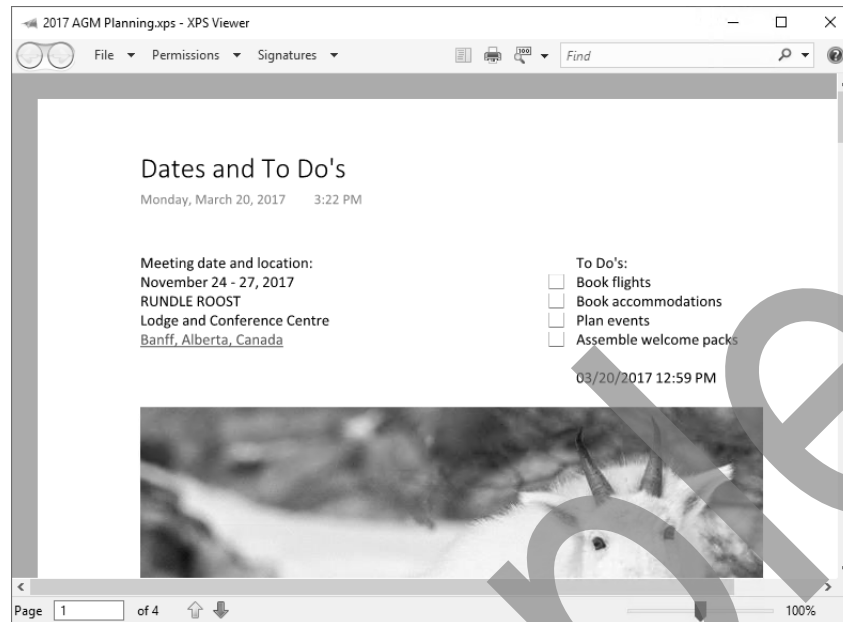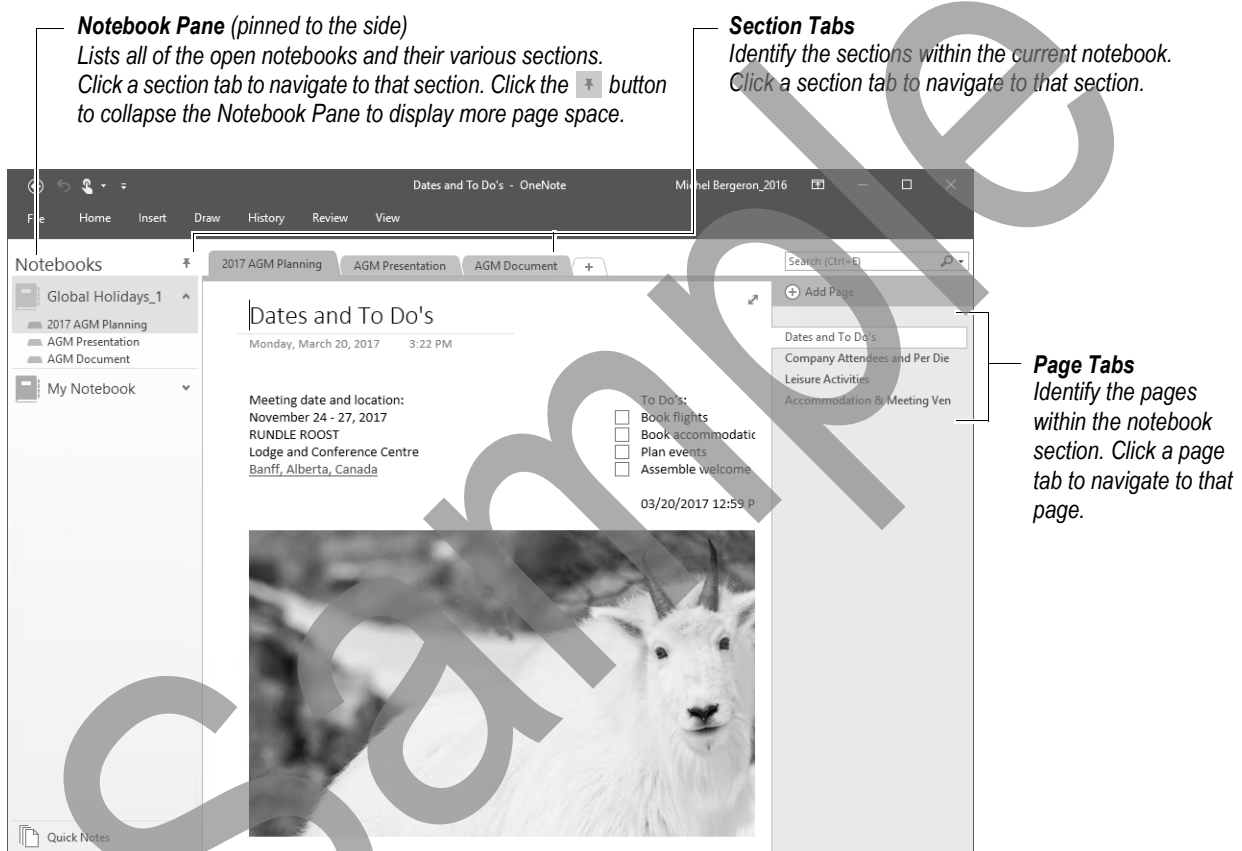

7. Close the *XPS Viewer* window.

8. Close the File Explorer window.

9. Close the two open notebooks.

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1.4   Navigating and Viewing Notebooks

Navigating Notebooks

There will always be the need to move from one notebook to another, as well as from one location (within a notebook) to another to display, insert and edit notes. You can navigate among notebooks, as well as their sections using the Notebook Pane (while it is pinned to the application window). Once the appropriate section is selected, you can navigate to the desired page using the page tabs, and then use the scroll bars to display the desired page area.

Alternatively, you can navigate to specific areas of a notebook using section tabs and pages tabs that are used to organize notebooks.

Notebook Pane *(pinned to the side)*
Lists all of the open notebooks and their various sections.
Click a section tab to navigate to that section. Click the ⊤ *button*
to collapse the Notebook Pane to display more page space.

Section Tabs
Identify the sections within the current notebook.
Click a section tab to navigate to that section.

Page Tabs
Identify the pages within the notebook section. Click a page tab to navigate to that page.

The following table describes several keyboard shortcuts for navigating within a notebook.

KEYBOARD SHORTCUTS

KEY(S)	ACTION
CTRL+TAB	Go to the next section
CTRL+SHIFT+TAB	Go to the previous section
CTRL+PAGE DOWN	Go to the next page in the section
CTRL+PAGE UP	Go to the previous page in the section
ALT+END	Go to the last page in the section
PAGE UP	Scroll up in the current page

KEYBOARD SHORTCUTS

KEY(S)	ACTION
PAGE DOWN	Scroll down in the current page
CTRL+HOME	Scroll to the top of the current page
CTRL+END	Scroll to the bottom of the current page
ALT+LEFT ARROW	Go back to the last page visited
ALT+RIGHT ARROW	Go forward to the next page visited

Viewing Notebooks

There are three different views that may be applied to alter the display of notebooks:

- The *Normal View* is the default view. It displays all screen components such as the Notebook Pane, as well as section and page tabs.

- The *Full Page View* hides the Ribbon, the Notebook Pane, as well as the section and page tabs to display more page space, while preserving the current application window size.

- The *Dock to Desktop* view hides the Ribbon, the Notebook Pane, as well as the section and page tabs, but also docks the application window to the right-side of the Desktop, resizing it to cover a smaller area. This view is helpful when you need to see other windows on the Desktop simultaneously. It also allows you to insert linked notes. See "Using Linked Notes" on page 81.for more information.

PROCEDURE

Applying Notebook Views

- To apply the Full Page View, click the **Full Page View** button in the *View > Views* group, or press **F11**.

- To apply the Dock to Desktop view, click the **Dock to Desktop** button in the *View > Views* group, or press **CTRL + ALT + D**.

- To restore the Normal View, click the **Normal View** ⤢ button that appears in the top-right corner of the window, or click the **Normal View** button in the *View > Views* group.

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Exercise – Navigating and Viewing Notebooks

The purpose of this exercise is to navigate within and among multiple notebooks and apply different views.

1. Click the ☐ File ☐, select **Open**, and then select the **Global Holidays** notebook from the *Recent (Today)* list to open it.

2. Open the "Global Holidays_1" notebook from the *Recent Notebook* list.

3. Click the *Global Holidays_1* drop-down button, and then click the **Pin Notebook Pane to Side** ☐ button on the Notebook Pane to pin it to the application window.

4. Click the **Global Holidays** icon on the Notebook Pane to active that notebook.

5. Display the data on the "AGM Presentation" page of the "Global Holidays_1" notebook.

   a. Click the **Global Holidays_1** icon on the Notebook Pane to active that notebook.

   b. Click the **Expand** ☐ button.

   c. Click the **AGM Presentation** section tab on the Notebook Pane to select it.

   d. Click the **AGM Presentation Notes** page tab to select it.

6. Click the **AGM Document** section tab to select it and display the data on the *Notes* page.

7. Display the **Leisure Activities** page in the *2017 AGM Planning* section.

8. Display the **Dates and To Do's** page in the *2017 AGM Planning* section.

9. Use the keyboard to navigate within the current notebook.

   a. Press **CTRL**+**END**.
      The bottom of the current page is displayed.

   b. Press **CTRL**+**HOME**.
      The top of the current page is displayed.

   c. Press **CTRL**+**TAB** twice.
      The AGM Document section becomes active.

   d. Press **CTRL**+**SHIFT**+**TAB**.
      The previous section becomes active.

10. Apply the Full Page View, and then restore the Normal View.

    a. Click the **Full Page View** button in the *View > Views* group.
       The Ribbon, Notebook Pane, section and page tabs are hidden.

    b. Click the **Normal View** ☐ button that appears at the top-right corner.
       The Ribbon, Notebook Pane, section and page tabs reappear.

11. Click the **Dock to Desktop** button in the *View > Views* group to apply the view.
    The OneNote application window becomes docked at the side of the Desktop.

12. Click the **Normal View** ☐ button that appears at the top-right corner to restore the Normal View.
    The OneNote application window is restored.

13. Click the **Unpin Notebook Pane from Side** ☐ button.

14. Close both notebooks.

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Review Exercise

The purpose of this exercise is to practice the tasks covered in this chapter.

SCENARIO

You have been asked to create a new notebook in which content relating to travel and tour destinations will be inserted. You also open an existing notebook to save a copy of it as an XPS document for ease of sharing. You also practice navigating within the existing notebook to locate content, and practice applying different views.

■ Managing Notebooks

1. Create a notebook named **Tours** in the C:\N161en_data folder.

2. Close the **Tours** notebook.

3. Open the **Tours_1** notebook.

4. Export a copy of the **Tours_1** notebook as an XPS document to the C:\N161en_data folder.

5. Open the **Tours_1** XPS document.

6. Close the **Tours_1** XPS document.

7. Close File Explorer.

■ Navigating and Viewing Notebooks

1. Ensure that the **Tours_1** notebook is still open.

2. Click the **South America** section tab to display the page in that section.

3. Click the **Asia** section tab to display the pages in that section.

4. Click the **Singapore** page tab to display the contents (empty) of that page.

5. Press **CTRL+PAGE UP** repeatedly to navigate to the *Asia Summary* page.

6. Apply the **Full Page View**.

7. Restore the **Normal View**.

8. Apply the **Dock to Desktop** view.

9. Restore the **Normal View**.

10. Close the **Tours_1** notebook.

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