Getting Started with OneNote

Microsoft OneNote provides an integrated environment for taking lecture notes, developing study materials, organizing lab images, collecting research materials for group discussion, building your own textbook for board exam preparation, and managing clinical notes. OneNote provides a familiar “notebook” framework for organizing information, analogous to a collection of 3-ring binders with section dividers, tabs, and individual document pages.

This walkthrough illustrates basic terminology and skills. The best advice is to get to know how OneNote works thoroughly so you can quickly decide how to best employ it to augment your existing study and work habits.

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Launch OneNote

In Windows XP, Start > All Programs > Microsoft Office 2007 > Microsoft Office OneNote 2007

In Windows Vista, type “onenote” in the Start Menu search.
There are a couple of features you will grow to appreciate. You never have to tell it to save what you are doing. OneNote automatically and continuously saves your work while you take notes, whenever you switch to another page or section, and whenever you close sections and notebooks.

In addition, if you close and later restart the application, it will take you back exactly where you were the last time you ran the program.

Here is an example of the main OneNote screen.

If you click the double arrow symbols at the top of the left and right “wrappers” you will see more details. Let’s explore this detailed view to cover the basic ideas.
Three main **tab zones** control content access: **Notebooks, Sections, and Pages.**

1. **Notebooks:** You can start a new Notebook for each Module.

2. **Sections in notebooks:** You can have separate sections for Lectures, Labs, Preceptor visits, Small Group, etc. in each notebook.

3. **Pages in sections:** Create a new page for each lecture, topic, lab, meeting, etc. You can also create page groups.

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The **Search all notebooks** field can read as well as locate handwriting and text within images. Select the drop down arrow to change **Search Scope.**

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Click **New Page** on the upper-right-corner of the document area. You can type, write with your stylus, and paste from the clipboard. The **Title** of the new page is from the uppermost row entry unless you type directly into the title box.

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Use **F11** to hide notebook **Details** (i.e., tabs) so you can focus on the document.
Some students handwrite their notes, others type theirs. If you have a Tablet PC or pen input device, you may prefer handwriting your notes over using a keyboard, or sketching illustrations over using drawing shapes.

Create a **New Page** to practice writing a new note.

Write your notes on the empty, lined page. It cleverly mimics a legal pad.

You can type, also. Note: I typed the (equally clever) title in the **title box**.
To remove pad lines, right-click the page tab and select **Page Setup**....

Find the **line style** field. There are many other things you can tweak here. Selecting a “grid” style, for example, may be helpful for sketching graphs or charts.


Change line style to **none**.

In addition, observe the change in appearance.
Print to OneNote

If you have trouble getting this to work, see the section on Repairing OneNote located at the end of this document.

The ability to print to OneNote is a feature you will use repeatedly. To try it, open a GroupWise email, a PowerPoint presentation or an Office document and press <CTRL + P>.

The Print dialogue box is displayed.

Select “Send To OneNote 2007” as your printer (this should be the default).

Click OK.

The document print process may pop up a dialogue box similar to this.
Then OneNote displays this dialogue box, unless you printed something tiny.

OneNote shows the “printed” document in the unfiled notes section.

I had to make sure my print spooler was not set to the use offline mode.

Taking Notes

The most important concept to learn here is how to print PowerPoint “lecture slides” to OneNote so you can take notes in class using the prepared lecture materials.

In the following example, we will download a PowerPoint presentation provided by the instructor.

Open the PowerPoint presentation and print to OneNote as described earlier. You can also change your printing configuration according to your note-taking preferences. Most prefer Notes Pages or just the slides. It is important to get into the habit of doing this before each class.

Open lecture’s PowerPoint presentation and click on the Office Button.
Cell Biology and Disease

Activation of immune responses, inflammation
Infection, bacterial, viral, etc.
physical, chemical trauma
aging, physical deterioration, toxic agents
autoimmunity

Malfunction: mutations, stresses
proteins, organelles, cellular interactions
connections, motility, tensile strength
contractility, replication

Hover over the print icon...
Then select **Quick Print** (assuming Print to OneNote is your default printer).

OneNote opens with the “printout” of the slides.

You might want to maximize, zoom (I chose 75%), and press F11 before you rotate your display for taking notes.

Here is an example of notes taken with this arrangement.

Take your notes in OneNote on the “printed” PowerPoint presentation. Just write on top of the slides. If you need more space, you can insert blank space.
Scroll down a bit to view the bottom of the first slide and the top of the second.

Notice **Insert** or **Remove Extra Writing Space** tool in the upper right corner.

Use this to make room for more notes – click and drag down between the slides.
When you release the left mouse button, the indicated space is inserted.

One thing you might have noticed from all the above is that the original PowerPoint presentation had notes under each slide, which are missing from this arrangement. If you want to see them in OneNote, you will need to print from PowerPoint differently.

Press <CTRL + P> to bring up the Print dialogue.
Select Notes Pages under “Print what” as noted.

You should experiment with the other options to see what is available. Of course, you can choose Preview to see what to expect.

When you send this version to OneNote there is more writing space, the notes are visible (and searchable!), and the slides are a bit smaller, and you can zoom to accommodate as needed.

If you prefer, you could also adjust the page layout settings for each PowerPoint presentation to allow for smaller margins and thus bigger slides.
The **second most important concept** when taking notes is building hyperlinks.

First, you need a few OneNote documents with notes in them. Then find a topic in one page that relates to part of another page. Create a link from the first document pointing to the specific location of the content you are linking. Paste the link in the second document. Here is an example showing the creation of a hyperlink.

Prepare the first document to receive the hyperlink.

Locate the pertinent information in the second document. **Right-click and select “Copy Hyperlink to this Paragraph.”**

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**Example:**

1. **Copy Hyperlink to this Paragraph**
2. **Order**
3. **Move**
4. **Resize**
5. **Set Picture as Background**
6. **Make Text in Image Searchable**
Observe the hyperlink you just built. Click on it to jump directly to the spot you linked in the second document.

Congratulations! You have made your first OneNote hyperlink. You will need about 10,000 before you are done. Good topics to link include disease names, lab values, treatments, procedures, drug names, diagnostic criteria, formulas, structures, genes, tumors, and organ systems, etc.
Inserting Documents

It is sometimes quite helpful to insert a document in OneNote, such as a web page, a Word document, an image file, and the like.

These may contain embedded link information.

Many students copy the entire contents of the histopathology Word document, which has the lab instructions directly into OneNote. This allows them to go through and insert snips of histology slide images for each specimen covered. The basic technique illustrates this by example.

Open the Word document containing the text you are interested in copying.

Press CTRL + A to select all text, or select just the items needed.
Open the OneNote page to receive copy.

Insert or Paste copied text into OneNote document.
The default action includes a link referencing the document you copied the text from.
Edit or insert additional content as needed.

Organizing Documents
Notebooks, sections, and page groups, oh my.
There are many strategies to organizing your documents.
Last year someone put out a framework that had every week of class listed as a section in each module (for the whole year!), with each module listed as a notebook.
While this may be taking things to the extreme, you will certainly find that your document organization paradigm becomes more complex as the year wears on. Thus, the best approach is to start simple, letting your hierarchy evolve as time goes on.
You will have less rearranging to do that way, with much less overthinking about the problem.
That said you might also find yourself completely lost if you just dump everything into the unfiled notes notebook and section.
Not to fear, though, documents will appear in chronological order, the default is to open where you last left off, and the search function (described below) is excellent.

Don’t bother rearranging your notebooks and sections until you have created at least several dozen documents.
Perhaps when you begin preparing for your first exam is a good time to create your first document “map.”
Moreover, after you see your grade on the first test you rearrange things so they really work well.
A good starting point is to have one notebook for each module or course, plus maybe a couple of additional ones for the curriculum learning objectives (not the module objectives) and for diseases.
Within diseases, you could have a separate section for each organ system and a separate document for each major disease.
Within learning objectives, you could also arrange by organ system since this meshes well with the current curriculum.

**Searching Documents**

OneNote searches everything. Including what you type, write by hand, or include in an image. You must configure the backup options. Moreover, you must reorganize the files regularly. Come exam time you can search to find everything in notebook referencing “diabetes,” for example. Here are a few key techniques. Type your search phrase in the Search window.

Limit the scope of your search as needed (e.g., this module or entire curriculum)
OneNote highlights sections & documents which match the search.

In addition, OneNote highlights search phrase where it appears in the document.

Flip through the matches using the search control arrows highlighted below.
OneNote found search phrase in a print to OneNote document.

You can also view a list of “hits” and pick from the list.
Annotating Documents

Here are notes on a PowerPoint lecture slide printed to OneNote.

In order to study the structure of humans or other living organisms, the eyeball needs a bit of help. This image is taken from a Nikon website and shows an early microscope.

Anthony Leeuwenhoek (1632-1723) is credited with being the “father of microscopy” because of his many discoveries and contributions, but invention of the microscope is credited to Zaccharias Janssen and his father Hans about 1590. Galileo also had a hand in designing and improving microscopes.
Example showing annotations for an Aperio image pasted into a OneNote page.

Flags and Shapes

OneNote incorporates a powerful feature called Note Flags. These are referred to as Tags throughout OneNote 2007. It still refers to the same thing: the capability of flagging and tagging your OneNote documents (much like you might do in a three-ring binder with Post-it notes or tape flags) organizing information contained therein. One common use of tags is to build a to-do list. Another is to track phone numbers, addresses, or other contact information embedded in random notes. One powerful tool is Note Flag Summaries. This brief overview shows you the basic tools and interfaces for using Note Flags to your advantage.

The Tag icon on the tool bar gives you one way to access the feature.

Position the cursor, click Tag, and type an optional description.
This tag marks the designated spot in your document as “important.” Try the drop down list to find a different type of tag.

Alternatively, you can do this from Insert >> Tag in the toolbar menu.

Or, go to View in the main toolbar menu to activate the Tags Toolbar.

This green area was tagged as a definition.
Here is a to-do list item.

You can check it off when you are done.

You can quickly locate all your note tags from here.

Or navigate to View >> All Tagged Notes
This shows the search result for tagged notes.

Which of course you can customize.
Recording Audio

Handy for small groups, study sessions, annoying your siblings, etc., this feature is easy to use. Just locate the microphone icon on the toolbar.

Moreover, click it. The recording starts immediately.

This may pay big dividends in small group when your instructor reads through all the learning objectives to make sure the class didn’t miss any key points (which, of course, they are not supposed to do – shhh – mum’s the word).

Oh, and for the hard core, you can search your audio notes, too. Personally, I would not bother with it.

Miscellaneous:

These topics while important are either supplemental or less frequently used.
Backing up OneNote

This setting is **critical** to keep OneNote Notebooks from taking up **too much space** on your Hard disk. The Backup Versioning (Number of backup copies to keep) must be set to 1. OneNote keeps a working copy and a backup copy. If your working data set is large, trying to keep two backup copies will rapidly fill up your disk.

Open this screen by selecting from the menu **Tools >> Options >> Backup.**

Optimizing files

You must optimize OneNote files regularly to make indexing and searching efficient. Heavy users may optimize daily, just before running backup.

From the OneNote menu, select **Tools >> Options >> Save.**

Be sure the percentage of unused space is set to fifteen, and the idle time is fairly short (not more than half an hour). Click Optimize Now to execute immediately.
SideNote

SideNote is for that quick note you used to write on the back of an envelope and stuff in your purse or wallet. Wait, do people still use those?

Press <Windows Key + N>, and the Side Note app appears.

These are placed in the unfiled notes notebook/section, as well. Perhaps you missed this trick: you can flip through several recent OneNote pages using these blue arrows on the SideNote toolbar, top left.

Microsoft’s OneNote Tutorial

An online resource you probably do not have time for. However, it is excellent.

Get OneNote Help, Demos, and Training here - free!

Click here to visit the OneNote site on Office Online
Repairing OneNote

To get Print to OneNote working right you may have to repair the installation following these steps.

Go to Start >> Control Panel >>

Select Programs.

Then select Programs and Features.
Scroll to find Microsoft Office in the list.

Select Microsoft Office Enterprise 2007 and click Change.

Select Repair and click Continue. You may have to reboot your computer.

Be prepared to wait a bit. Mine took about thirty minutes.
Eventually it will finish. **Close** the program as indicated.

To **verify** that OneNote is properly installed, **test** printing to OneNote.

When you press the **Print** icon (or <CTRL + P>), Microsoft Office programs will print to the **default printer**.

For SOM tablets, the default printer was pre-configured to be Microsoft OneNote. This will **launch the OneNote application** showing an **Untitled page** with a copy of your printout imbedded. Unless you change the default configuration, this will go to the **Unfiled Notes** section of the Unfiled Notes folder.

**Sharing Notebooks**

You can share one or more OneNote notebooks with other students and colleagues. This may come in handy for Small Group or Problem Based Learning group activities. **Notebook-sharing works best in conjunction with Microsoft SharePoint Server** (surprise!). Once you upload a notebook to a SharePoint Site, you can send your group a link to download the notebook. OneNote has built-in synchronization capabilities that sync changes you and others make to the notebook. In theory, multiple people can make changes to a notebook or page and view each others’ changes almost instantly.

Sharing is beyond the scope of this overview, but you can find out more and see how it works at:

**Sharing an Existing OneNote Notebook:**


**Opening a Shared Notebook:**


 **Microsoft Shared Notebook Demo:**