



OneNote

November 17, 2023

Table of Contents

Microsoft OneNote	4
Why use OneNote:.....	4
Get Started – Logging in.....	4
OneNote 365.....	4
The Notebook Structure	4
The OneNote web app Screen	5
Navigation	5
Search.....	5
The OneNote desktop app Screen	5
Searching across Notebooks for your notes	5
Open a Notebook.....	6
Close a Notebook.....	7
Delete a notebook from OneDrive	7
OneDrive - online	7
OneDrive - File Explorer	7
Creating a New Notebook.....	8
Adding Sections and Pages	8
Sections.....	8
Rename, Delete, Add a page and Section Color	9
Pages.....	9
Containers.....	9
Moving Containers.....	9
Combining Containers.....	9
OneNote Ribbon	10
Home tab	10
Tags.....	10
Dictate.....	10
Feed.....	11
Create and Edit a Quick Note (sticky note) in your feed	11

Edit the Sticky Note.....	12
Quick Note options	12
Filtering notes	12
Insert Tab	12
Audio Recording.....	13
Math Assistant	13
Forms	14
Insert an existing form in a page	14
Create a new form or new quiz	14
Meeting Details – Inserts details from an Outlook meeting	15
View tab	16
Immersive Reader	16
Page Color – Each page can be a different color.	17
Page rule lines – Each page can have different rule and grid lines.	18
Page Versions.....	18
Show Authors.....	19
Deleted Notes	19
Sharing and Collaboration with others.....	20
Share with People	20
Share using the Share button in a Notebook	21
Another way to Share a notebook.....	22
Installing OneNote (desktop app) for Windows	22
Saving a PowerPoint Presentation into OneNote (Desktop app only).....	23
Import an Excel spreadsheet into a OneNote page (Desktop app only)	24
Excel Spreadsheet in OneNote	24
Password Protecting a section (Desktop app only)	22
To Remove the Password	23
OneNote on the go – Mobile app for iOS and Android	25
References	25

Microsoft OneNote

Microsoft OneNote is a digital note-taking app that can be used for ideas, research and project planning saved in notebooks. Images, files, diagrams, audio, and videos can be added to these notebooks, and **everything is automatically saved in the cloud using OneDrive**.


OneNote is part of the Office 365 suite and is free at RPI with an active RCS account. You can share these digital notebooks with people inside and outside of RPI. OneNote can be used in other programs within Office Suite, both on your desktop and mobile devices.

Why use OneNote:

- To keep organized for a Meeting (Agenda, notes minutes, documents to review)
- To organize your thoughts for a presentation, proposal or class notes and projects.
- For Instant and Real-Time collaboration
- For personal use when organizing a celebration/to-do's or for lists.
- To share information with colleagues or family members instead of texting or emailing.
- For Project Management and Spreadsheets.

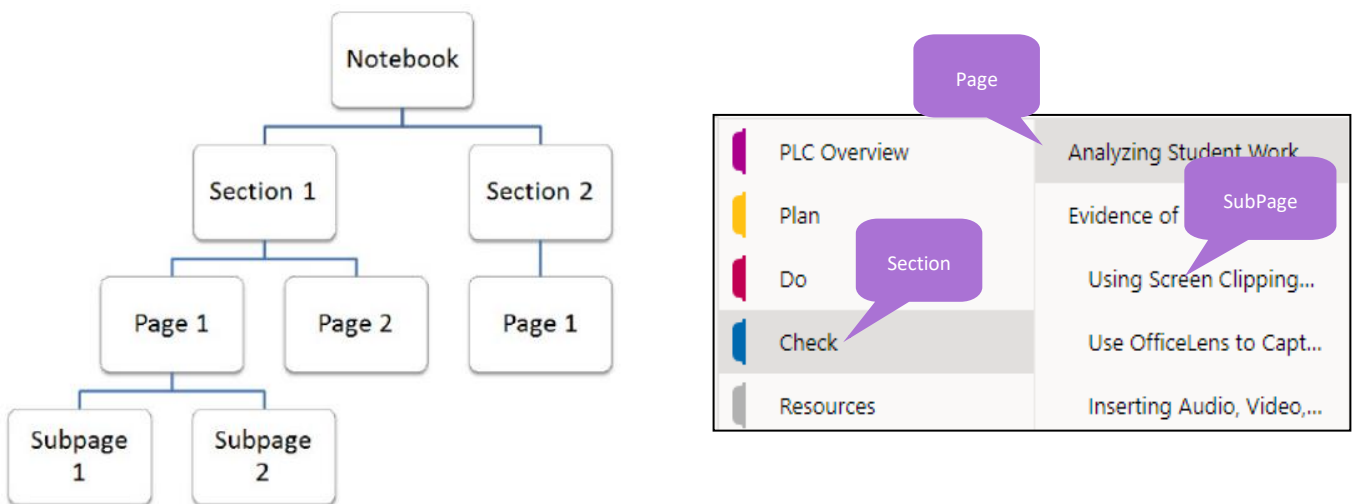
Get Started – Logging in

OneNote 365

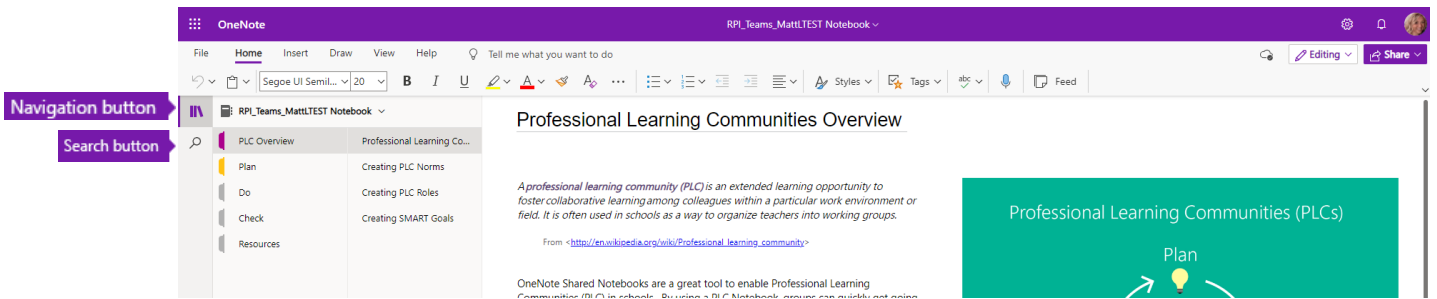
1. Type **portal.office.com** – Login with your RPI email and RCS password.
2. From the left navigation bar click OneNote  or in the top search bar type **OneNote**.

The Notebook Structure

A notebook contains sections, and under those sections are pages. Pages can then be divided into subpages.



The OneNote web app Screen

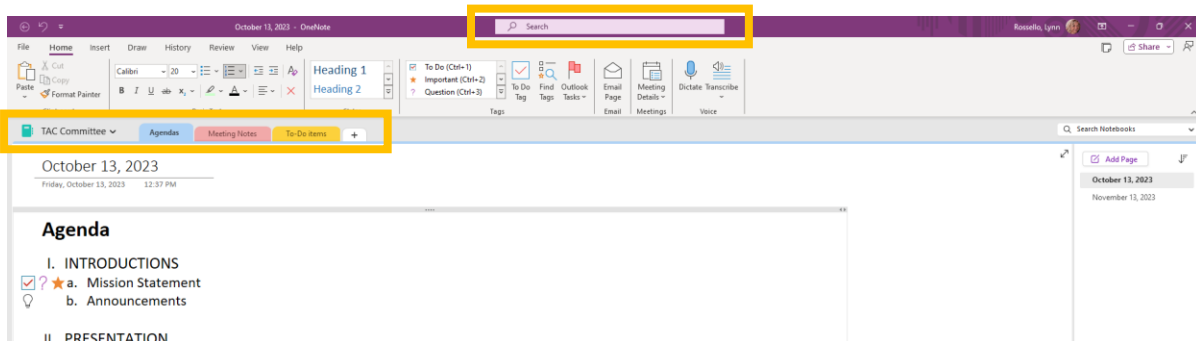


Navigation – This button toggles to open and close the navigation pane on the left and displays your current notebook’s and where you can switch and create pages, sections, and notebooks.

Search – Search for keywords, phrases, or tags you applied within your notes across all your notebooks.

The OneNote desktop app Screen

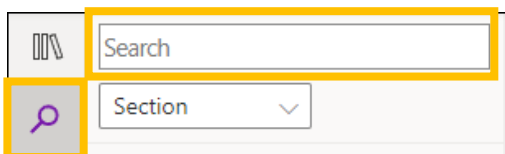
Search is at the top and Notebook names are under the drop-down menu and section tabs are to the right.



Searching across Notebooks for your notes

OneNote allows you to search notes across ALL notebooks at once.

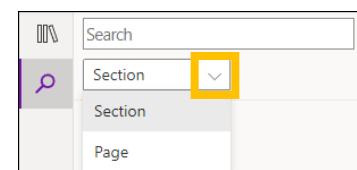
1. Select the magnifying glass from the left navigation pane.
2. Then type a word or phrase on the Search line.



OneNote searches:

- Typed text.
- Handwritten notes.
- Words shown in pictures.

3. Click the drop-down arrow to narrow the search to a section or page. OneNote highlights the search word or phrase in notes and pictures.



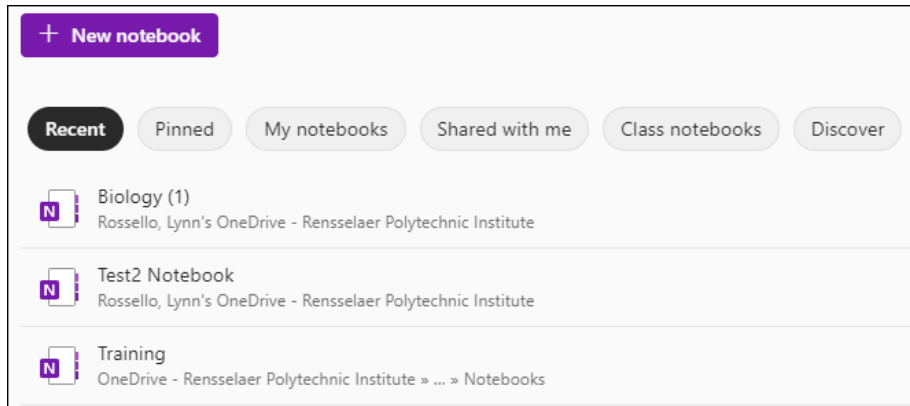
Open a Notebook

Notebooks can be open two ways:

- Go to **portal.office.com** and click OneNote and choose from the list below.
- OneDrive places notebooks in their own folders for you to choose from.

From the OneNote web app:

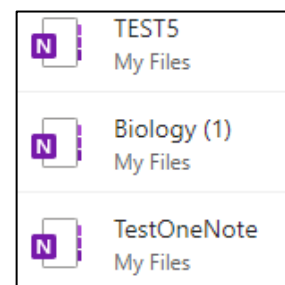
1. Click once on one of the Notebooks listed in one of the tabs. Recent/Pinned/My notebooks/Shared with me



Tab	Description
Recent	Most recently opened notebooks.
Pinned	Notebooks added to the pinned tab by clicking the tack icon to the right of the notebook.
My notebooks	Notebooks I created.
Shared with me	Notebooks shared by others.
Class notebooks	Setup for lesson plans, interactive lessons and collaborate and provide feedback for a class.
Discover	View documents others are working on.

From OneDrive:

1. Go to **portal.office.com** and search for the OneDrive app.
2. Locate the OneNote notebook below and **double-click on the notebook name.**



Close a Notebook


OneNote does not have an option to close a notebook as it is automatically saved as you work in a notebook.

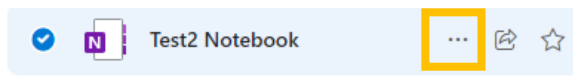
1. Open another notebook and any changes you made on the last notebook are automatically saved in OneDrive **OR** close the OneNote Web app and the **notebook is automatically saved to OneDrive.**

Delete a Notebook from OneDrive

OneNote notebooks can only be deleted through OneDrive.

OneDrive - online

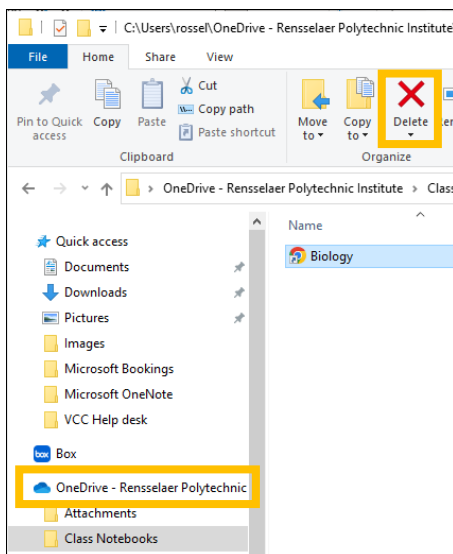
1. Go to **portal.office.com**
2. Login with your RPI email and password.
3. Search and open **OneDrive.**
4. Click **My files** from the left navigation bar.
5. Locate the Notebook file from the below list or click the Notebooks folder  Notebooks and then click the three dots “...” to the right of the file name and choose **Delete.**



OneDrive - File Explorer

If OneDrive has been downloaded.

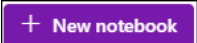
1. **Locate the file**, then choose **Delete** from the file explorer ribbon.

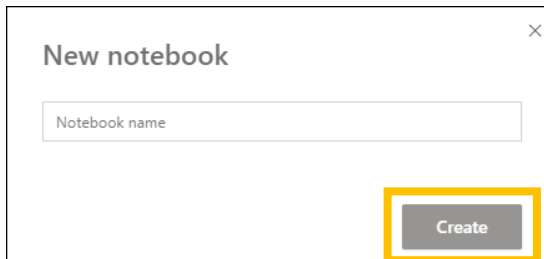


Creating a New Notebook

Multiple Notebooks can be created for different subjects or projects.

1. Go to **portal.office.com**
2. Locate the OneNote icon from the left navigation pane **or** type OneNote in the search bar at the top.

3. Click the **+New notebook**  button in the top left corner of the screen.
Type a name for the New notebook and then click **Create**.



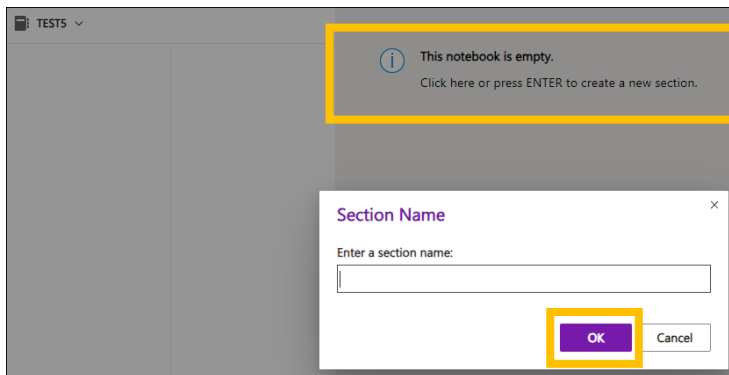
4. A blank notebook opens.

Adding Sections and Pages

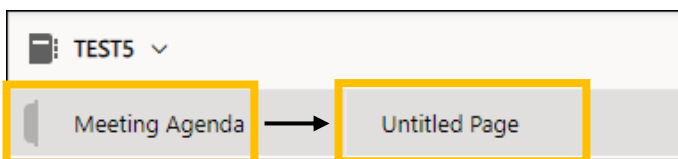
Sections are used as subjects or topics that arrange the Pages that hold the actual notes. Notebooks can have as many sections and as many pages as needed.

Sections

1. With a Notebook opened, click once on **“This notebook is empty”** and the Section Name dialog box appears.
2. Enter the **section name** and then click **OK**.

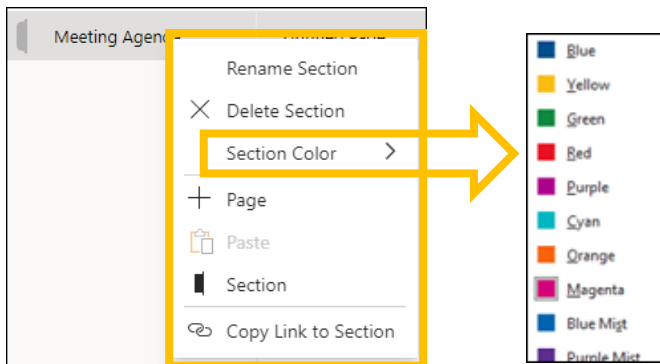


The section showing an Untitled Page appears under the Notebook name.



Rename, Delete, Add a page and Section Color

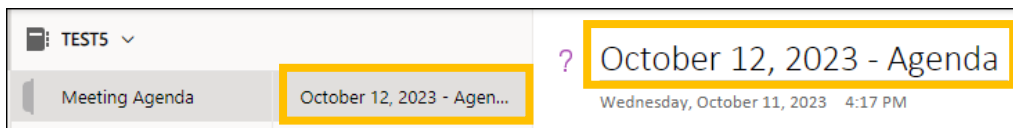
1. **Right click on the section Name** and many options appear below to choose. Adding a section color can make that section stand out. Under Section options you can rename, delete or copy a link to the section.



Pages

When you first create a section, an Untitled Page is created automatically. Click to the right of the section to add the title of the page.

1. As you type the name of the page, you will see the Untitled Page name changes to the name that you typed.

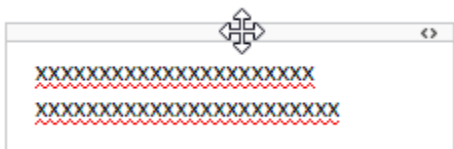


Containers

Notes or text are contained in boxes on the OneNote page. The containers expand as you type more text in them.

Moving Containers

These boxes can be moved by moving the cursor to the top border of a text container and once this cursor changes to a four-headed arrow. Click, hold, and drag to another place on the page.



Combining Containers

Two separate note containers can be combined into one by dragging one note container into another while holding down the Shift key. Once you let go of the mouse button, the contents of the note container that you were moving moves into the destination note container.

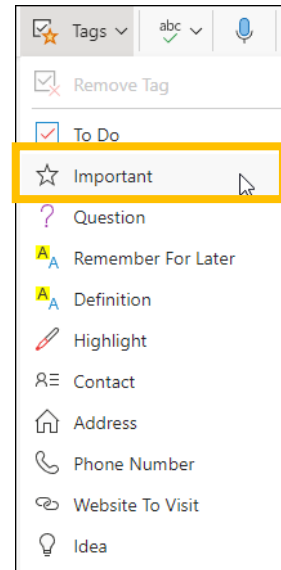
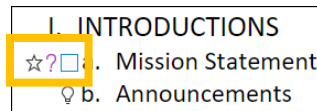
OneNote Ribbon

There are many features on the OneNote ribbon that you are probably familiar with from other Microsoft applications. Those that you may not be familiar with are described below.


Home tab



Tags - Use tags to categorize and prioritize notes to easily mark what's important, call out something you have questions on or assign action items for yourself and others. **NOTE:** Add a **Checklist box/To Do** tag (Ctrl + 1) and/or and **Important** (star) tag (Ctrl +2) quickly by highlighting a word(s) and choose the shortcut above.

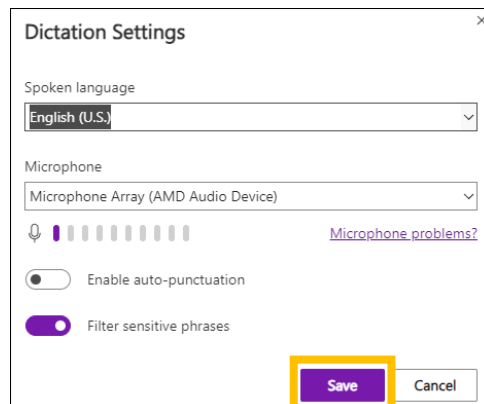
1. Move your cursor at the beginning of the line of text you want to tag.
2. Click **Tags** from the Home tab and choose a tag. **NOTE:** You can add as many tags as necessary to the same item.
3. To delete a tag, place your cursor at the beginning of the line of text you want to remove the tag and choose the same tag again from the Tags list.



Dictate – allows you to use the speech-to-text to create content with a microphone and an internet connection.

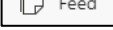
1. Click the **microphone icon**  or the Dictate icon from the Home tab.
2. From the side panel on the right, **choose the language**.

3. The dictate toolbar shows at the bottom of the screen. 
4. Before you start recording, you may want to review the Dictation Settings. Click the **Settings** icon  from the toolbar. The settings allow you to change the language, test the microphone, enable auto-punctuation or filter sensitive phrases. Click **Save**.



5. When you are ready to speak, click the microphone icon and begin speaking. Click the microphone icon again when you are done speaking, to stop the text from typing.

Feed – When the Feed pane opens, your recently edited notes appear. These notes are a combination of notes, page changes, and sticky notes (manually added notes in feed).

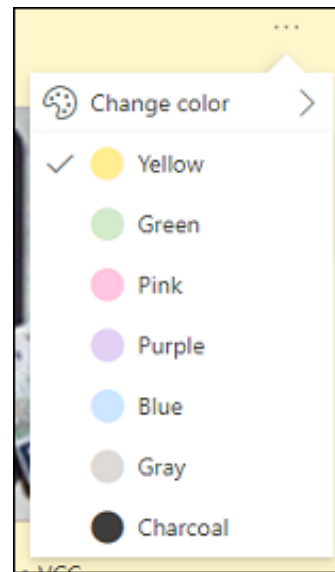
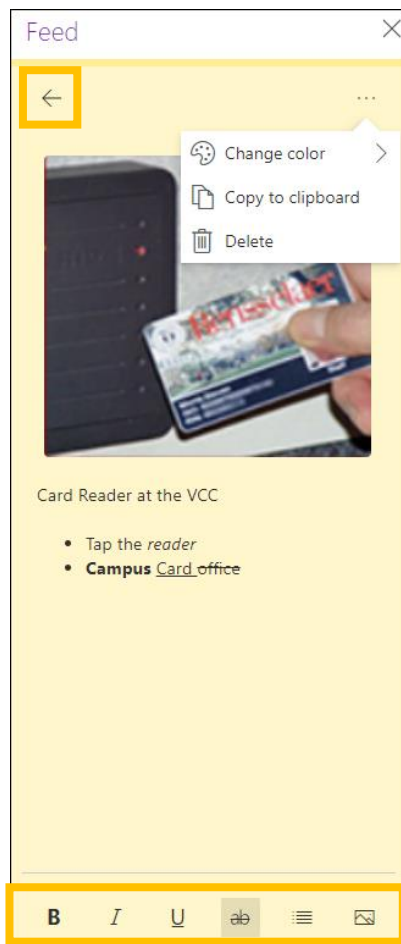
1. With a Notebook opened on the screen, click **Feed**  from the Home tab.
2. The feed panel opens on the right showing recent notes, page changes and/or sticky notes.

Create and Edit a Quick Note (sticky note) in your feed

1. Click **+ Add a note** from the feed panel.

The panel changes to the new sticky note.

2. Begin typing your note. You can use the small text editor at the bottom of the note to make the note stand out. This note is automatically saved.
3. Click the three dots (. . .) or more options to change the color, copy to clipboard or to delete the note.



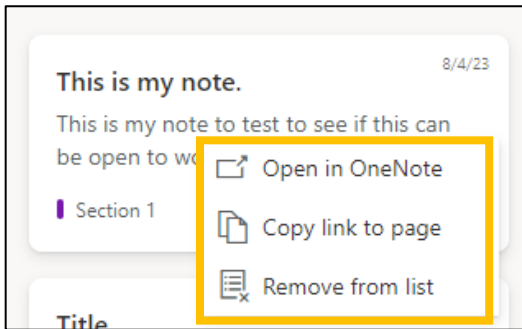
Edit the Sticky Note

1. With the feed panel open, click the sticky note you want to edit.
2. Make your changes to the note.
3. Click the back arrow located in the upper left of the sticky note to save the note.


NOTE: The sticky notes in your OneNote feed are also shown in a Notes folder in Outlook Web and in the Microsoft Sticky Notes app for Windows 10.

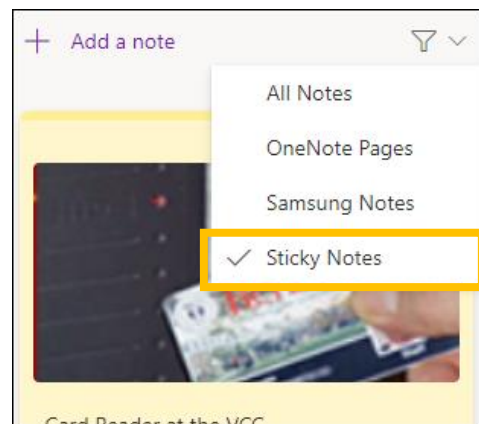
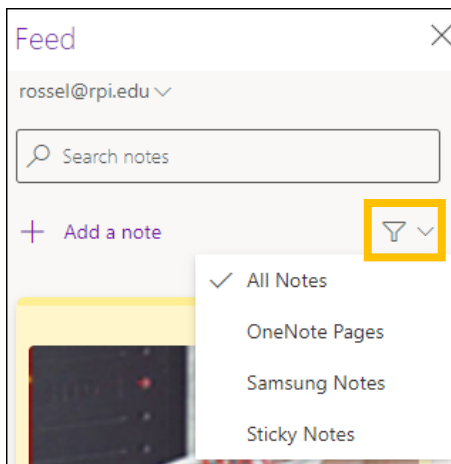
Quick Note options

1. Right click on any note to open the note and then copy a link to the page or to remove the note from the list.



Filtering notes

1. While in feed, click the filter icon  and choose what type of note you want to filter on and only those notes appear in the feed panel.



Insert Tab

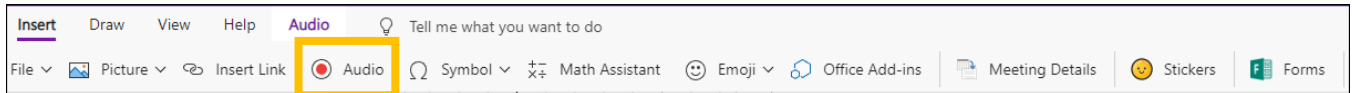
There are several features on the Insert tab that you are probably familiar with, so only new features are explained below. <https://support.microsoft.com/en-us/office/basic-tasks-in-onenote-on-windows-2eee07df-9f05-4d5f-9806-afcadb2d80b9>

Audio Recording

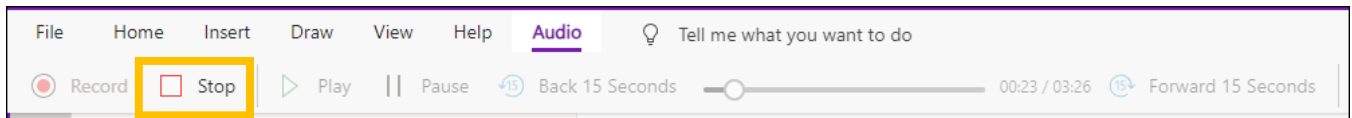
You can instantly record your notes or a conversation during a meeting. **NOTE:** It may be a good idea to test your recording first for sound before starting.

1. While on a OneNote page, place your cursor where you would like the recording to appear on the page.

2. Click the **Insert** tab and then choose **Audio** .

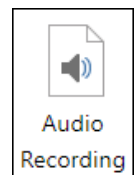


3. **Begin speaking** and when you are done, click **stop**.



An Audio Recording file appears on the page.

4. Click once on the **Audio Recording** and then click **Play** to review the recording.

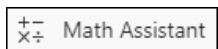


Math Assistant

Type a math problem and the Math Assistant will solve it for you. - <https://support.microsoft.com/en-us/office/solve-math-equations-with-math-assistant-in-onenote-1b37bb8d-eed1-40d7-8d0f-5e6e46547441>

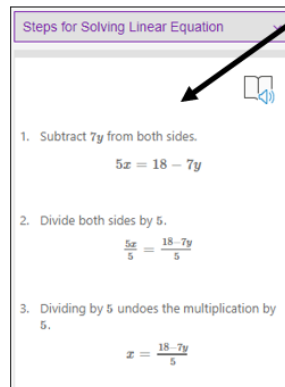
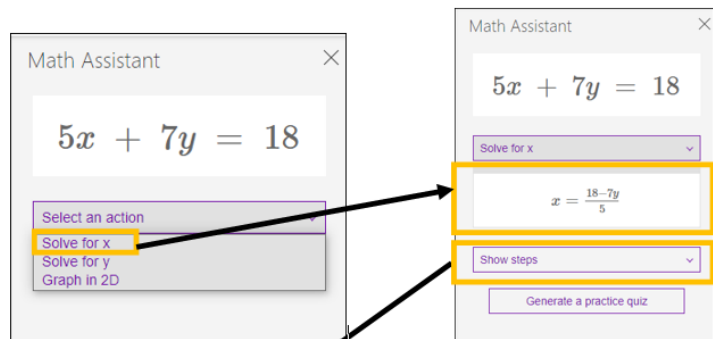
1. While on a OneNote page, click the place your cursor where you would like the Math equation to appear on the page and begin **writing your equation**.

2. **Select the equation**, and then on the Insert tab, click **Math Assistant**

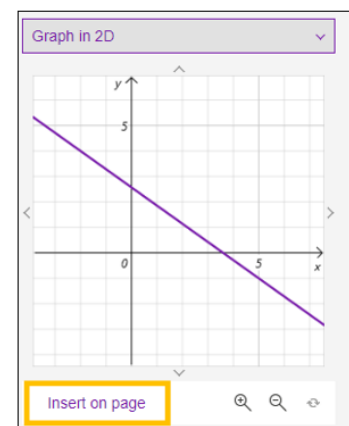


The Math Assistant panel opens on the right.

3. Select an action. For this example, choose Solve for x and the Math Assistant shows the answer below.



Graph in 2D can be added to the page.



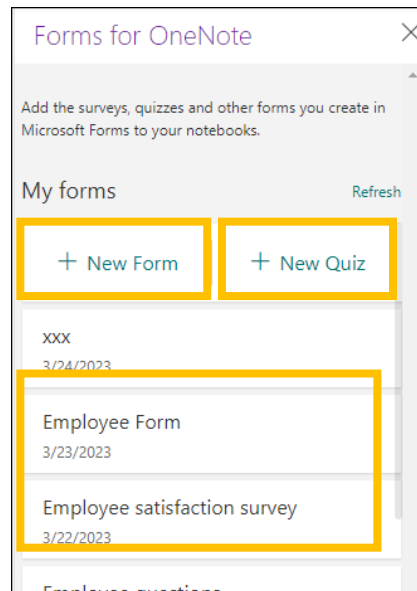
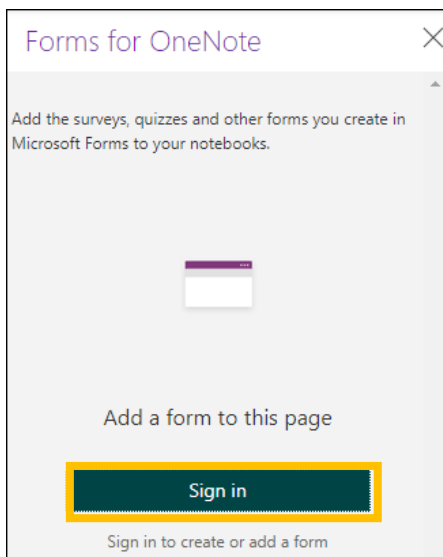
Forms

Forms are used to create surveys, quizzes, and other forms for your notebook.

1. While on a OneNote page, place your cursor where you would like the form to appear on the page and then click the **Insert Tab → Forms**

The **Forms for OneNote** opens in the panel on the right.

2. Click **Sign in** and any forms you created in the past appear below as well as the **+ New Form** and **+ New Quiz** buttons.



Insert an existing form in a page

1. Click in the OneNote page where you want to insert the form and then click the **Insert tab → Forms**

The form appears on the right side for you to choose.

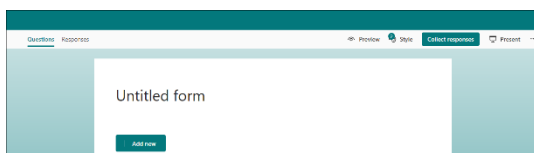
2. Click one of the forms and then choose **Insert**.
3. **Complete the form** and then click **Submit**.
4. Click **Fill out the form** and this form window opens to complete the form.

Create a new form or new quiz

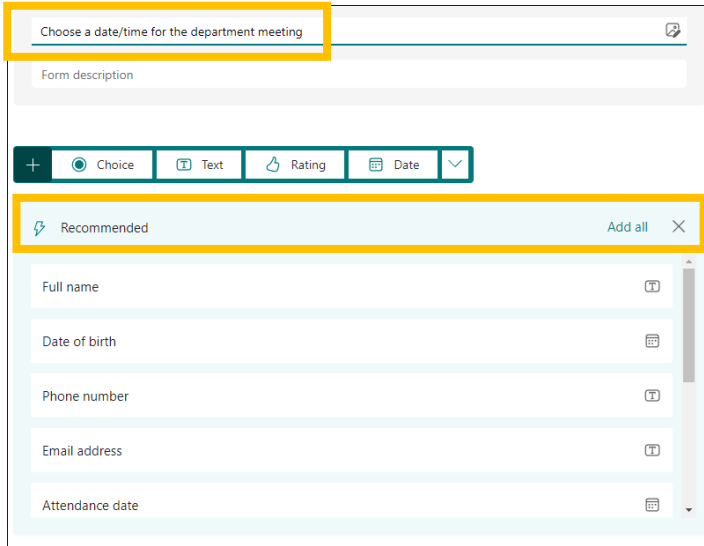
1. Click the **+ New Form** button.

An Untitled form appears.

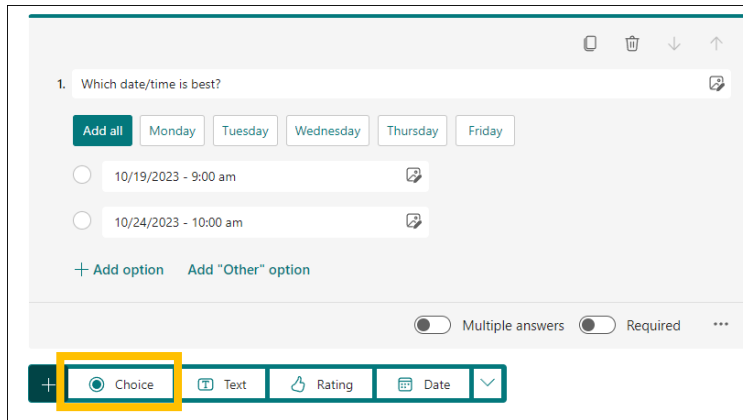
2. Click Untitled form and **type the name of the form**.



3. As soon as you begin to type the name of the form, form field recommendations appear below to choose from.



4. Click **Choice** and options appear for you to add text.



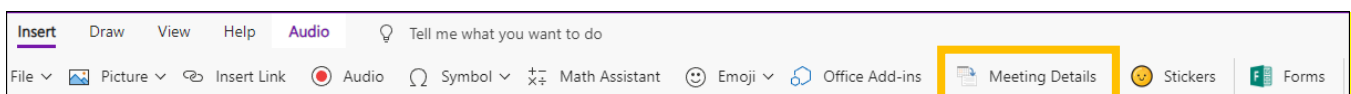
NOTE: To learn more on **how to create Forms** go to itssc.rpi.edu and search for **Microsoft forms**.

Meeting Details – Inserts details from an Outlook meeting

You can add meeting details from Outlook into your OneNote notes. Such as the date and location, agenda, topic, and attendees.

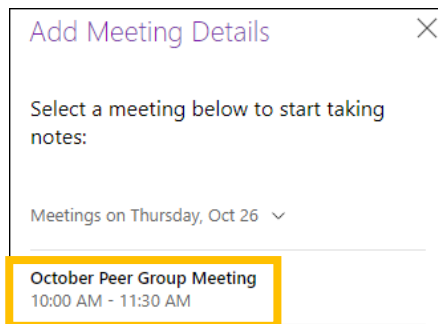
NOTE: Outlook and OneNote desktop app need to be installed on the same computer to add meeting details to your notes.

1. Open the OneNote page and click the cursor on the page where you want the meeting notes to appear.
2. From the **Insert** tab, click **Meeting Details**.

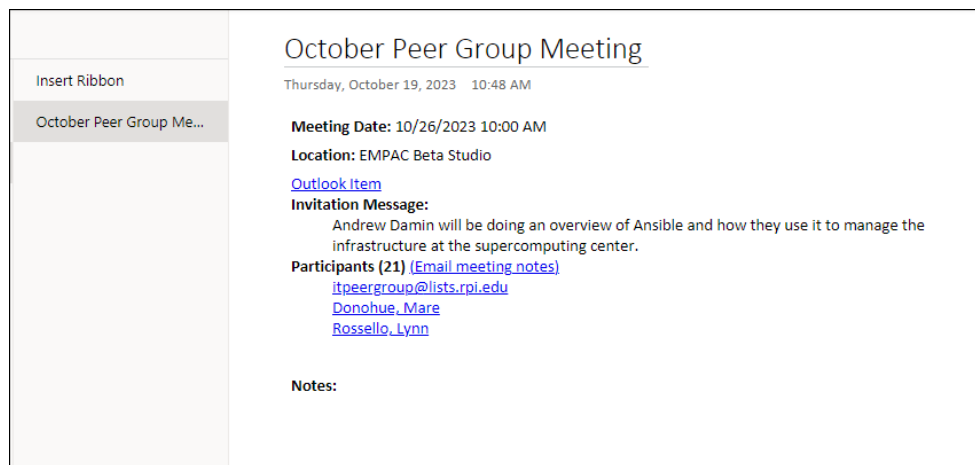


NOTE: You may be prompted to **Sign in with a work or school account** and the **Add Meeting Details** wants to display a new window dialog box may appear, click **Allow**.

3. The Add Meeting Details panel opens to the right for you to **choose today's meeting selection** below or to click the drop-down arrow and **select a date from the calendar**.



4. The meeting information is added to the OneNote page.



View tab

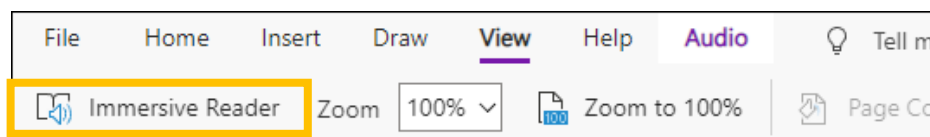
Immersive Reader

The Immersive Reader feature **reads out loud and comprehends text** on the screen.

Immersive Reader is now available through several different applications including:

- OneNote Online and Desktop app
- Word Online and Desktop app
- Outlook Online and Desktop app
- Microsoft Teams

1. Once on a page with text, click the **View tab** and choose **Immersive Reader**.

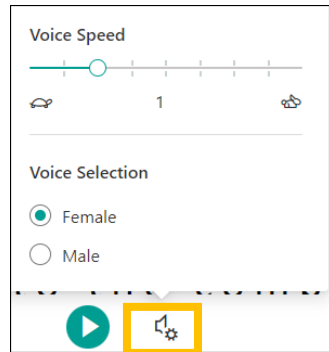


2. Click **Play** at the bottom of the screen. The voice selection and speed can be changed under **Voice settings**. Other features in the upper right corner are **Text Preferences**, **Grammar Options**, and **Reading Preferences**.

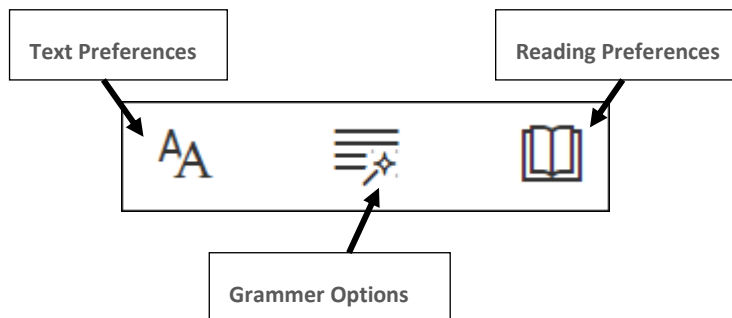
Play Button (bottom of the screen)



Voice Settings (bottom of the screen)




Other Features - (found upper right corner of the screen)




3. Click the **back arrow** located in the left top corner of the Dictation feature window **to close** the Immersive Reader and return to the OneNote window. <https://www.thetraininglady.com/immersive-reader-onenote/>

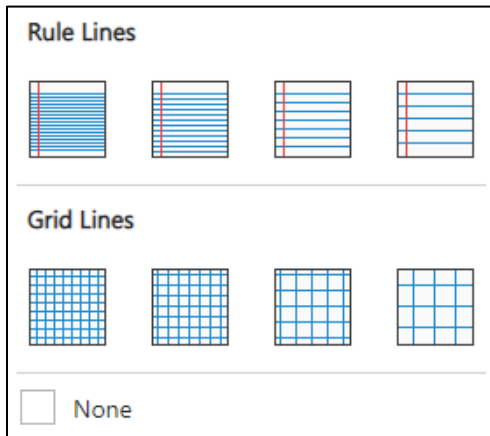
Page Color – Each page can be a different color.

1. While on a page, click the **View** tab.
2. Click the drop-down arrow to the right of **Page Color**  and choose a color.

The page changes to the color that was selected.

Page rule lines – Each page can have different rule and grid lines.

1. While on a page, click the **View** tab.
2. Click the drop-down arrow to the right of **Rule lines**  and choose a Rule or Grid line.

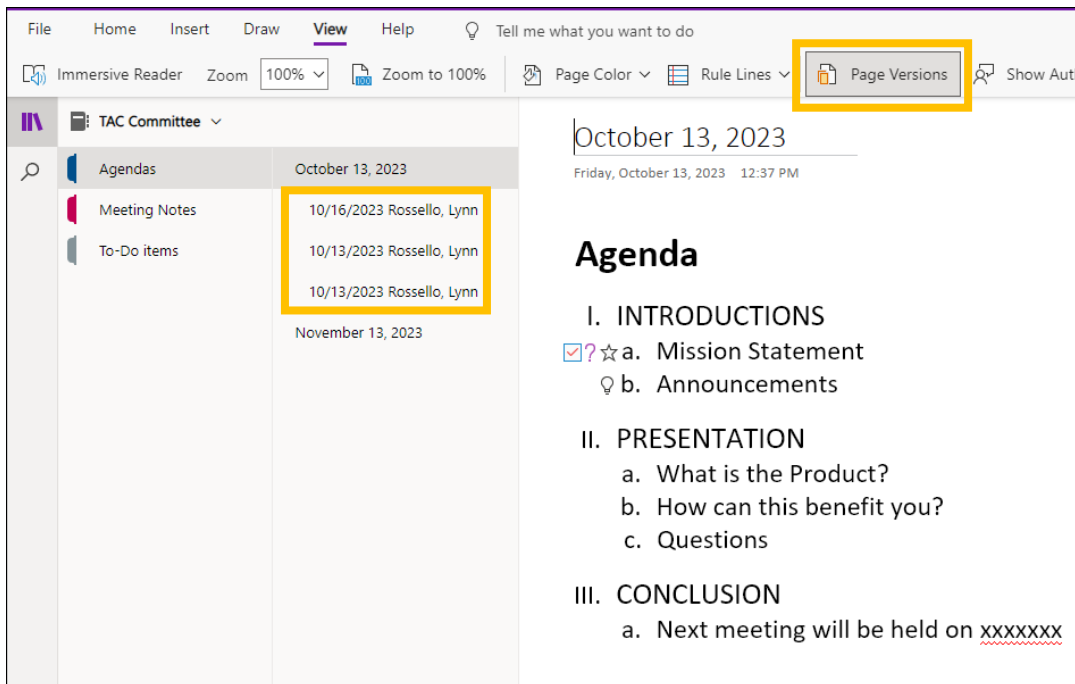


The Rule or Grid appears on the page.

Page Versions

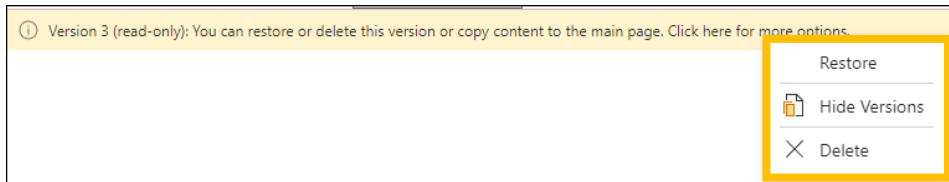
OneNote (web app) keeps track of past versions of each page in your notebook. The **Page Versions** feature allows you to review those other versions and gives you the option to choose one of the past versions to replace the version on the screen.

1. With the page on the screen, click the **View tab** and then click **Page Versions**.



A list of versions appears below under the name of the page. As you click on each version to review a note will appear at the top of the page.

2. Click this note to see more options.



3. Choose one of the options or go back to the recent version by clicking on the page title. Click the Page Versions on the ribbon again to close this window.

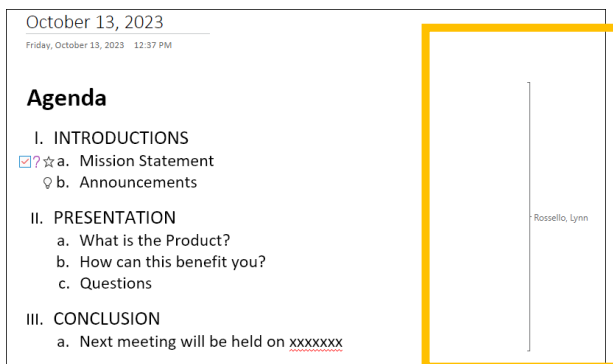


Show Authors

This feature shows a list of authors who have added information to the notebook.

1. While on the OneNote page, click the **View tab**, and then click **Show Authors**.

All authors will appear to the right in a side bracket.

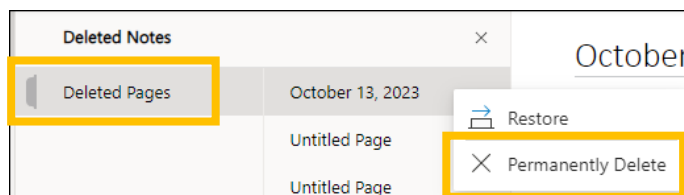


2. Click the Show Authors again to close the Author window.

Deleted Notes

You can easily locate notes that were deleted by choosing the Deleted Notes option on the View tab.

1. While in OneNote, click the **View tab**, and then choose **Deleted Notes**.
2. On the left navigation pane click Deleted Pages and a list of deleted pages appears to the right.
3. Right-click on one of the pages and then choose either Restore or **Permanently Delete**.



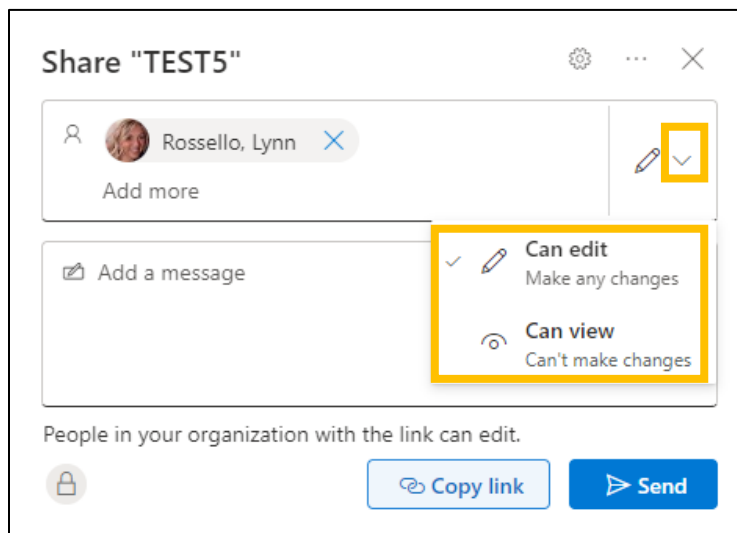
4. Click the "X" in the upper right corner of the Deleted Notes to close the window and return to the Notebook.

Sharing and Collaboration with others

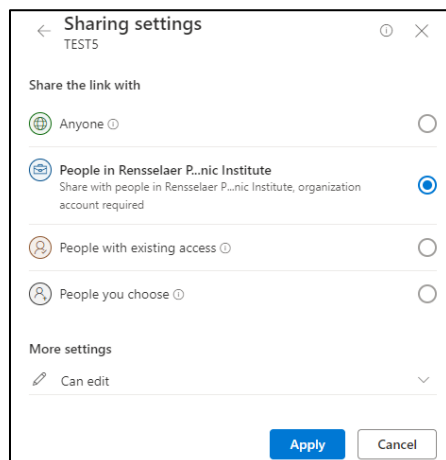
Notebooks can be shared by others for collaboration. The online version of Microsoft OneNote allows real-time collaboration so multiple users can edit a notebook at the same time.

Share with People – Using this option allows you to enter the names or e-mail addresses of those who you would like to share the current notebook with, as well as the type of access that the recipients can have to this notebook. A message can be included, as well as see who this notebook has already been shared with.

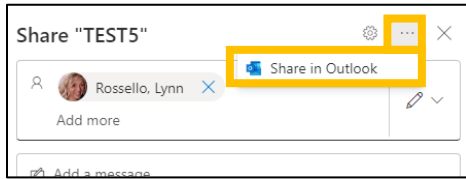
1. Click **File** in the upper left corner, and then click **Share**.
2. Choose **Share with People** and the Share screen for that notebook appears.
3. Begin typing the name(s) or e-mail address(es).
4. Choose what access this person or group will have (Can edit or view)



5. A message can be added letting the person or group know the name and details about the notebook, etc.
6. **Share link with** – The **default** is set to **People in your organization with the link can edit**, however this can be changed. Click this default to see sharing settings.
 - a. You can now change the Share the link with and once you click **Apply** this new option becomes the default.



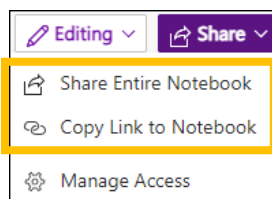
7. Click the **More options** (three dots) and then choose **Share in Outlook** and Outlook opens to a new email.



8. You can also just copy the link to the clipboard by choosing the **Copy link** button or click **Send**.

Share using the Share button in a Notebook

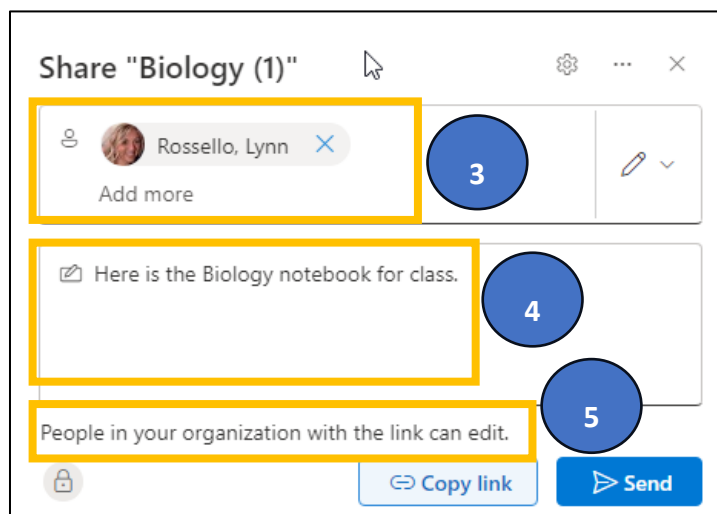
1. With a notebook open, click the  **Share** button in the upper right corner.
2. Choose **Share Entire Notebook** or **Copy Link to Notebook**



- **Share Entire Notebook:** If you wish to share your entire notebook with a specific person, you must first obtain that person's email address. Then, you can easily grant the receiver editing or viewing permissions.
- **Copy Link to Notebook:** If you want to share your notebook with many people in your organization, you can send them a link exclusive to your notebook.
<https://www.makeuseof.com/tag/use-microsoft-onenote-work/>

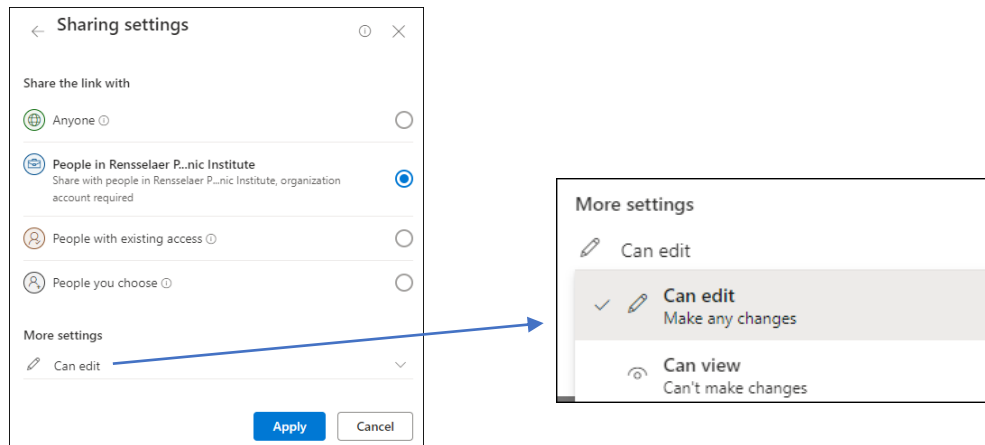
The Share window appears.

3. Add a **name, group, or email address**.
4. **Type a message** below.



5. Choose **Anyone, People in your organization (RPI) with the link can edit, People with existing access, or People you choose**.

6. Choose under **More settings** what access this person/group should have. Then click **Apply**.



Another way to Share a notebook

1. **File** → **Share** → **Share with People** and the Share window appears.

Installing OneNote (Desktop app) for Windows

OneNote can be installed on a PC, a Mac, in a browser, or on a mobile device, and each version of OneNote lets you access your cloud-connected notebooks.

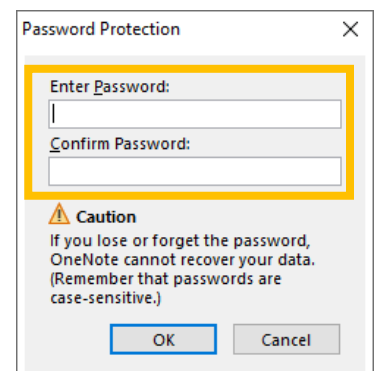
Desktop install for Windows

1. Go to: <https://support.microsoft.com/en-us/office/install-or-reinstall-onenote-for-windows-c08068d8-b517-4464-9ff2-132cb9c45c08>
2. Click **Download OneNote**.
3. **Run** the **.exe file** (Submit a request if you have questions on installing)

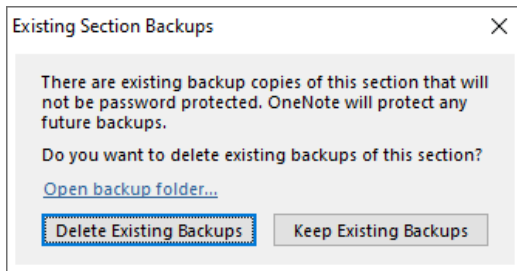
Password Protecting a section (Desktop app only)

If your notebook contains personal or sensitive information, it is a good idea to use passwords to restrict access to your notes. In OneNote, passwords may be applied to a notebook one section at a time, so you can choose what information you would like to protect.

1. From the **Review Tab** → **Password** and then click **Set Password...** from the side panel that opens on the right.
2. Enter and confirm a password and then click **OK**.
OR
3. Right-click on the section tab you would like to protect and choose **Password Protect This Section** and then the Password Protection dialog box appears to Enter and Confirm a password. **IMPORTANT** passwords are case sensitive and if you lose or forget the password, OneNote cannot recover the password.



An Existing Section Backups dialog box appears letting you know about existing backup copies of the section.



4. Choose either to delete or keep existing backups.

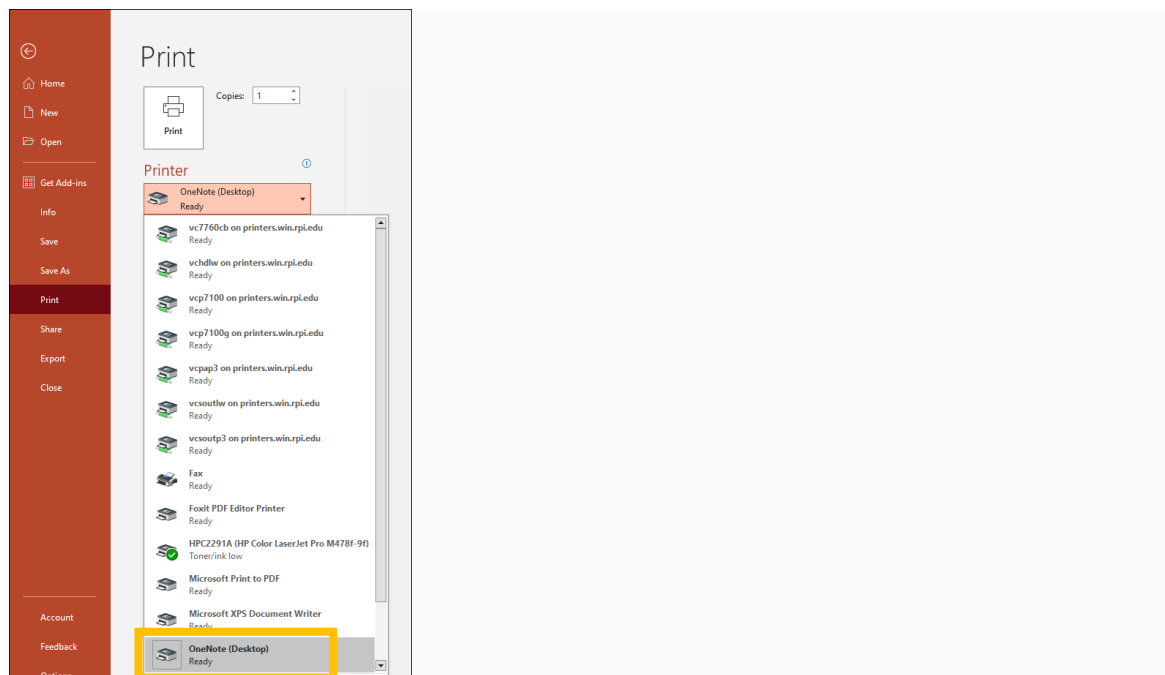
To Remove the Password

1. Right click on the section tab and choose Password Protect This Section... and choose the Remove Password... button from the side panel on the right.
2. Type the current password and the password is removed.

Saving a PowerPoint Presentation into OneNote (Desktop app only)

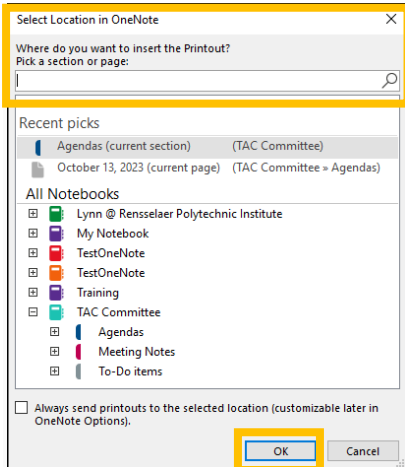
A PowerPoint presentation can be saved using the OneNote desktop app.

1. Open a PowerPoint presentation and navigate to **File** → **Print**.
2. Under the Printer dropdown, select **OneNote (Desktop)**



3. Click **Print** when ready to export to OneNote (Don't select Send to OneNote 2016 if using the app).

4. Choose the **Notebook** where you want the slides imported and then click **OK**. **NOTE:** For this step to work, the notebook must already exist.

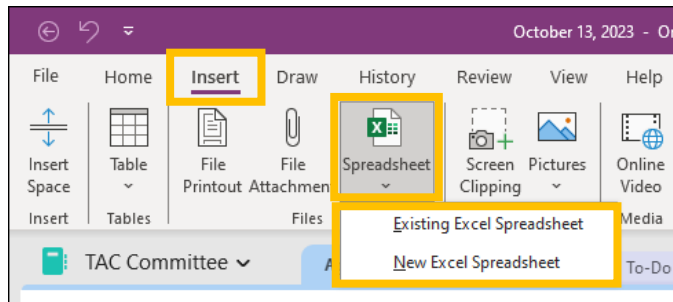


Import an Excel spreadsheet into a OneNote page (Desktop app only)

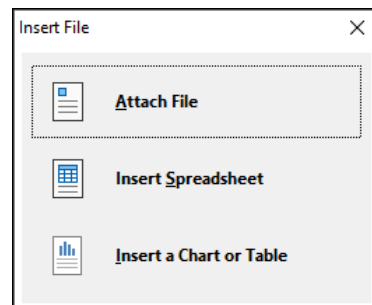
A spreadsheet can be imported into a notebook while using the OneNote desktop app. Once you close the desktop app that information is synced and can be accessed through the OneNote web app.

Excel Spreadsheet in OneNote

1. With a notebook opened on the screen using the OneNote desktop app, click the **Insert** tab.
2. Click **Spreadsheet** and choose **Existing Excel Spreadsheet** or **New Excel Spreadsheet**.



3. If you choose Existing Excel Spreadsheet, and then double-click the Excel file an Insert File dialog box appears. **Attach File** – Adds the spreadsheet as an attachment to the notebook. **Insert Spreadsheet** – Inserts the spreadsheet as an image in the notebook.



OneNote on the go – Mobile app for iOS and Android

1. Go to your app store for your device to download the OneNote app.

References

<https://support.microsoft.com/en-us/office/create-a-notebook-in-onenote-6be33cf9-f7c3-4421-9d74-469a259952d3>

https://www.makeuseof.com/tag/use-microsoft-onenote-work/?newsletter_popup=1

What's the difference between the OneNote versions? - <https://support.microsoft.com/en-us/office/what-s-the-difference-between-the-onenote-versions-a624e692-b78b-4c09-b07f-46181958118f>

Percipio – Search on all OneNote Training videos

<https://rpi.percipio.com/search?q=OneNote>

<https://rpi.percipio.com/search?categories=Video&q=OneNote>

Tags - <https://support.microsoft.com/en-us/office/apply-a-tag-to-a-note-in-onenote-908c7b92-6ed0-498d-bc7d-1b44e6827d05>