

## K2's Using OneNote More And Email Less

OneNote is a fantastic application included in your Microsoft 365 subscription. Yet, it is underutilized and misunderstood most of the time. If you genuinely want to change how you work, embrace OneNote. Stop using Outlook as a filing cabinet for essential emails and move them to OneNote instead. If you share a OneNote notebook with others, you can stop emailing altogether within your group and use OneNote as your collaboration and reference platform.



**K2 Enterprises**

## Introduction

OneNote is a fantastic application included in your Microsoft 365 subscription. Yet, it is underutilized and misunderstood most of the time. If you genuinely want to change how you work, embrace OneNote. Stop using Outlook as a filing cabinet for essential emails and move them to OneNote instead. If you share a OneNote notebook with others, you can stop emailing altogether within your group and use OneNote as your collaboration and reference platform.

## Major Topics

- Using OneNote as a powerful reference resource
- Learn how to move your emails into OneNote
- Share OneNote with a group of people and communicate within a notebook rather than email.

## Learning Objectives

- List tasks for which you might choose to use OneNote
- Identify ways to reduce email and use OneNote for yourself and your group or team
- Cite examples of how you can use OneNote for storing and retrieving important reference information
- Identify the process for acquiring OneNote

## What Is OneNote

OneNote is your all-in-one digital notebook that can replace your paper notebook. It's the perfect place to track necessary information, including notes, emails, documents, pictures, and links.

With OneNote, you no longer need to rely on paper for notebooks, lists, or sticky notes. For example, you can use it before, during, and after meetings to ensure all the required information is in one place and easily shared with everyone who attended.

OneNote can help you stay organized and increase efficiency by providing a centralized location for all your information. Plus, because it's a digital notebook, you'll never have to worry about losing important notes or papers again.

OneNote is also an excellent tool for collaboration. You can share your notebooks with your team to reduce email traffic and make it easier to work together. For example, you can use OneNote to capture updates and references on a project and share them with others in your team.

Whether taking notes for yourself or sharing them with others, OneNote is an essential part of Microsoft 365. It integrates seamlessly with Microsoft Outlook and Microsoft Teams, making it a versatile and robust solution for anyone looking to stay organized and productive.

## OneNote Is Available On Many Devices

OneNote is readily available to anyone, and you can also download it free of charge from Microsoft's website.

Use OneNote on the following devices:

- On a PC or Mac computer
- On the web
- On an iPhone or Android phone
- On an iPad or Galaxy/Android device

If you log into these devices with the same Microsoft account, you can access the same notebooks, no matter which device you choose.

### Two Desktop Versions Of OneNote

At the time of this writing, two OneNote applications are available for a PC:

- The OneNote app, which comes with Microsoft 365 and
- OneNote for Windows, which comes with Windows.

You may already have these applications on your PC, or you can download either one. These applications do look a little different from one another, but they perform all the same functions. For this instruction, we will use the OneNote app.

## Creating Your First Notebook

There is no limit to how many notebooks you can create. When creating notebooks, save them consistently in the same location so it is easier for you to find them. You may want to create a Notebooks folder on your OneDrive.

Once the OneNote app is open on your computer, go to **File** and choose **New**. Then navigate to the OneDrive or SharePoint location where you want to create the notebook. If you use Teams and plan on sharing this notebook, it is best to establish it in Teams.

### Opening OneNote From A Different Device/Computer

Let's say you use OneNote on your desktop computer at work. However, you may also want to access this same notebook on your laptop, phone, iPad, or another computer – perhaps one that doesn't belong to you.

1. Once you have the OneNote app open on your computer, go to **File**, choose **Open**, and navigate to the OneDrive or SharePoint location where you saved the notebook
2. From the app on your iPad or phone, you go to the **More Notebooks option** to open any existing notebooks.

## Opening OneNote From The Web Application

Assuming you have Microsoft 365 and are actively using Microsoft OneDrive or Teams and SharePoint, you can access your notebook from any computer by going to the web and logging into your Microsoft account.

1. Go to the login page for Microsoft at [www.office.com](http://www.office.com).
2. Log in to your Microsoft account using the appropriate email and password. Do not save this login information to a device that does not belong to you.
3. Go to the waffle menu at the top left of the Microsoft window, and choose **OneNote**.
4. Click **My Notebooks** to see all notebooks created using the current Microsoft login.
5. To open one of the notebooks, click on the notebook name.

## Storing And Retrieving Information Easily

OneNote is a potent tool for storing and retrieving information. Whether you're taking notes in a meeting, gathering research for a project, or keeping track of your to-do list, OneNote makes it easy to capture and organize your thoughts. With features like notebooks, sections, pages, tags, links, website links, and searching, you can quickly find the information you need when you need it. This section explores how OneNote can help you store and retrieve data efficiently to stay organized and focused.

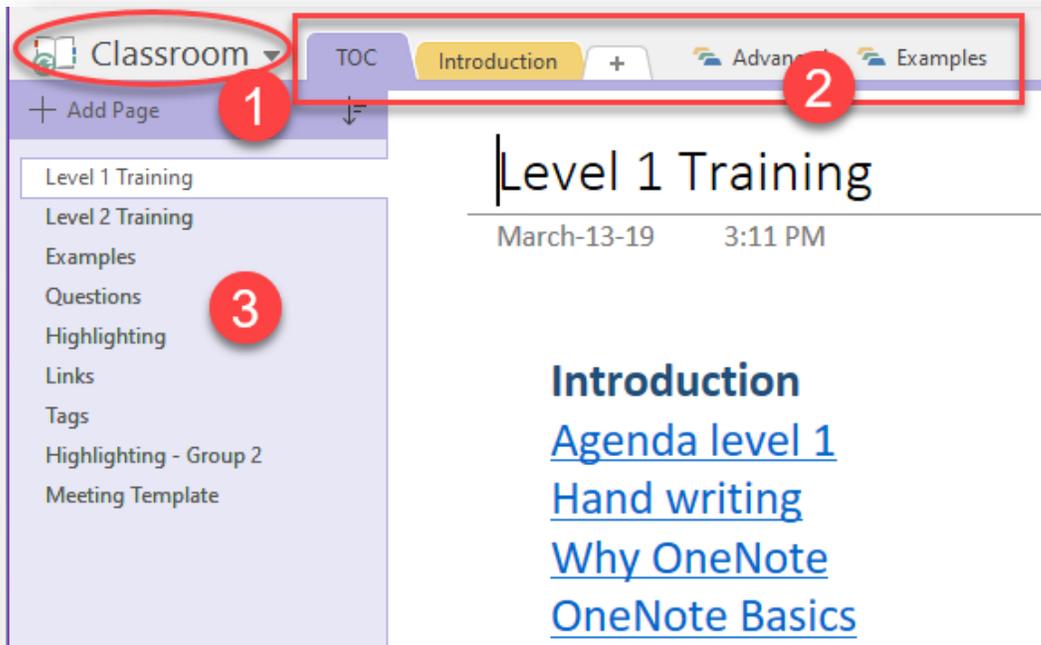
Let's look at how the notebook itself is structured. Each notebook has *sections* and *pages* to help categorize your information.

## Creating Notebooks, Sections, And Pages

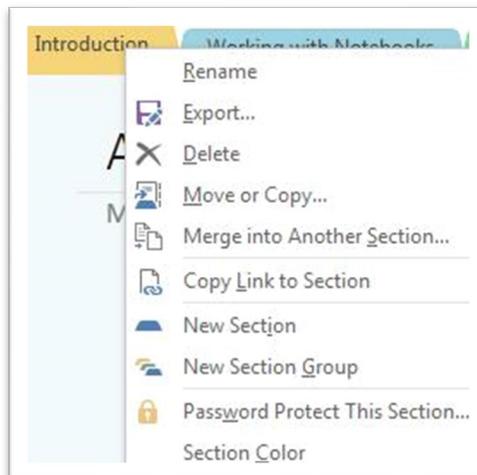
To achieve better organization, find the best way to store notes and related information with Microsoft OneNote.

Fundamental to organizing within OneNote is this program's system of:

1. Notebooks,
2. Notebooks have Sections and
3. Sections have Pages.



1. Click on the **Plus** sign to add a section to the notebook.
2. Alternatively, right-click on any Tab to add a new section



### Creating A Page In The OneNote App

You can have as many pages as you need in any section of your Notebooks. Click **Add a Page** on the screen's right to add a page. A page in OneNote is not the size of a piece of paper; there are no definitive limits. If you plan to print your OneNote notes, use a Page template for that paper size.

## Entering Information Into Your Pages

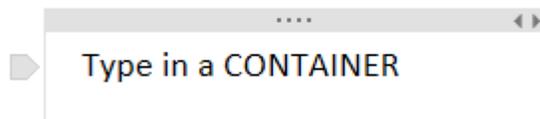
Entering into a notebook page is different from typing into a Word document. There are no pre-defined page dimensions. Your notebook page can be as wide and as long as you want it to be. If you wish to print information from your page eventually, you may want to type into a standard page width.

### *Titles*

The title of your Page becomes the title on the right side.

### *Typing Text*

If you press **Enter**, you can continue typing text like you would in Word or other Microsoft programs. Following is an example of a Container.



If you click somewhere outside this area, you create a new Container. Each container can be **sized or moved**. Further, Containers can hold more than just text. Containers **store anything you add** to your notebook, such as:

- Pictures,
- Emails (from Outlook),
- Word or Excel documents (or any other type of document)
- Audio or video clips
- Hand writings /drawings

You can click on the Border of the Container and move or delete the container if necessary.

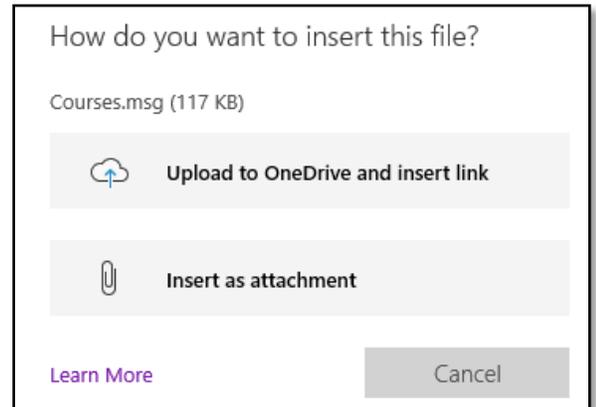
## More Notebooks

Once you have notebooks created, if you go to another device and use OneNote, you will need to open up the notebooks you have created (on other devices). Use the More Notebooks option to open up these other notebooks. You may also need to do this if you've opened a notebook in Teams and now want to see that notebook in your OneNote App.

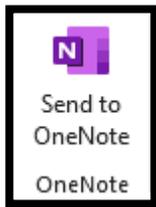
## Add Emails To OneNote

You can easily add an email from Outlook to OneNote. This action copies the email from Outlook; it does not move it.

1. **Click and Drag** an Email from Outlook into a notebook Page.
2. Insert as an attachment.
3. Or choose to **Save to OneDrive and link** from OneDrive.



## Use Send to OneNote button in Outlook

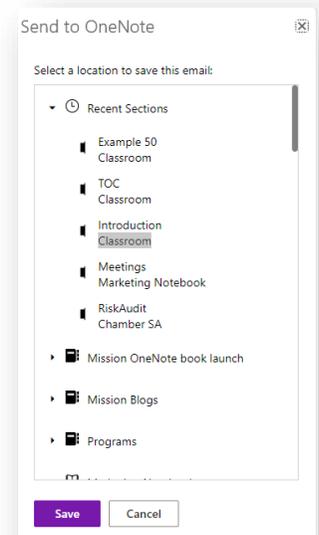


If you use Microsoft 365, another way to add an email to OneNote is to use the **Send to OneNote** button on the Home tab of the Ribbon in Outlook. When you use this button, you send the selected Email Message to a page in a OneNote notebook.

*For this button to work, you must create at least one note in Microsoft OneNote. You also should have opened that notebook on your computer.*

1. Click on a Message in Outlook. The message could be in the inbox or any other folder.
2. Click on the Send to OneNote button on the Home Ribbon.
3. Choose the notebook and section from Recents, or scroll down to choose a different notebook. If you do not choose the Recent Section, when you select a notebook, click the arrow to choose the Section.
4. Click the Save button.

This email is still in Outlook, but now a copy is also in Microsoft OneNote. If you delete the email from Outlook, its copy remains in OneNote.



## Documents

You can add a Document to OneNote as a:

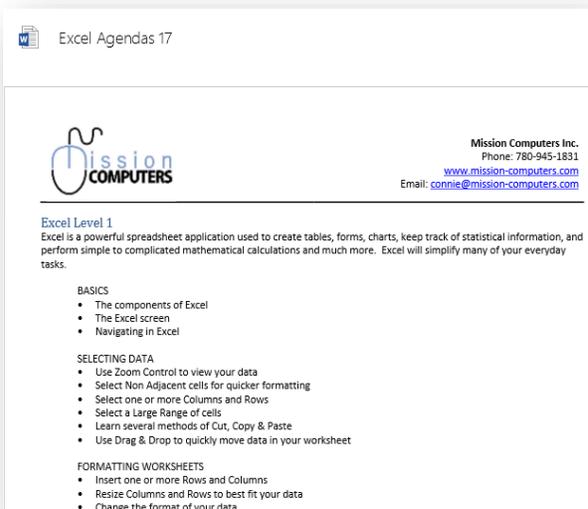
- File Printout (Insert Toolbar)
- File Attachment (Insert Toolbar or Drag & Drop)
- Copy Link

 OneNote agendas a...	File Attachment
<a href="#">Top Ten Time Saving Tips for Computers</a>	Link to a file.

### File Printout

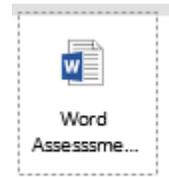
File Printout gives you the best of both worlds; you have an attachment and a printout of what the file looks like. After you create this File Printout, you could remove the attachment or the printout. To do so, click on hit and press Delete.

This File Printout occupies your notebook and is not attached or linked to the original file. If you make changes in this object, it does not change the original file. This printout is a copy.



### *File Attachment*

File Attachment is just like an email attachment. It consumes space and appears as an attachment. To read the attachment, you will need to double-click on it.



### *Document Link*

A Document Link takes up no space in your notebook and always links to the source of information. Links may originate from your computer, network, cloud drive, website, etc.

Example Link: [Top Ten Time-Saving Tips for Computers](#)

### *Do You Have Access To The Link When You Need It?*

When linking to a file in your notebook, ensure you have access to that location. For example, will you need access to that file if you are out of the office? If you do, link the file via a remote cloud site like OneDrive, SharePoint, or Dropbox.

## Links

Use Links in OneNote to reference or relate one piece of information to another. For example, you can link a paragraph, a page, or an entire section.

### Paragraph Links

Copy Links from One Paragraph to a Word or Phrase:

- On the same page,
- In a different section,
- In a different notebook

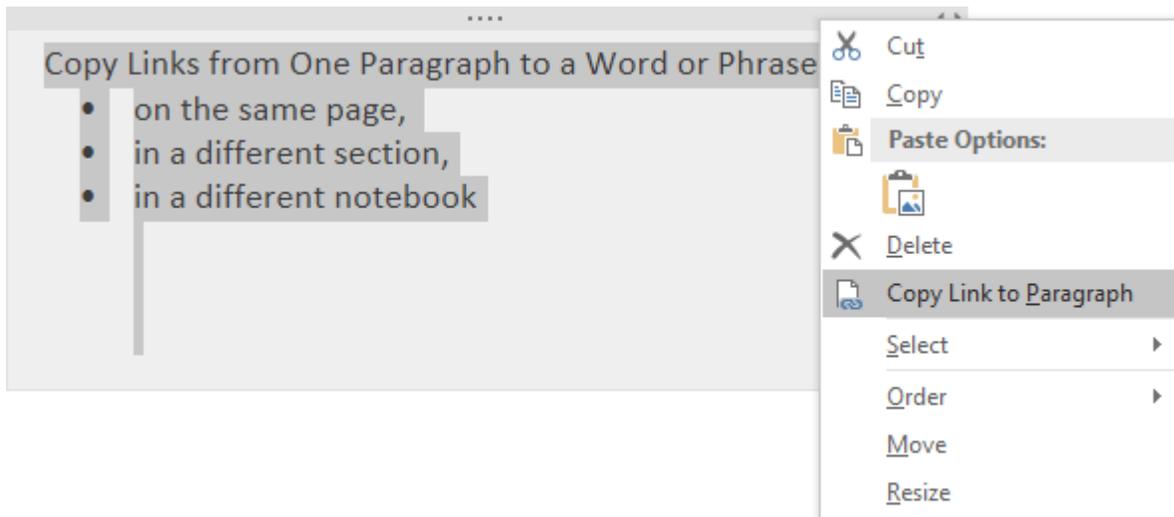
### Copying Links From The Paragraph

Following are the steps to use if you wish to link a paragraph to another page in a notebook.

1. Right Click on a Paragraph or a Page
2. Choose Copy Link to Paragraph (or page)
3. Go to where you want to view the Link
4. Paste (Ctrl-V or Right click)

You will then see an underlined word or phrase.

As shown below, you can also copy Links from one paragraph to another area on the same page.

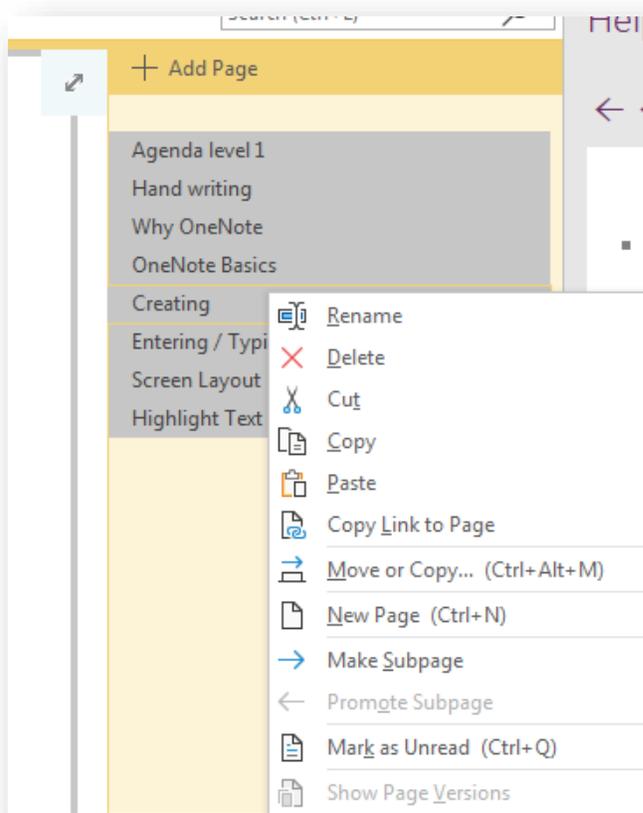


### Link To Another Page In Your Notebook

In this example, we begin on the page where we want the link to reside, and then we will find the linked page to link it.

1. Click on the **Insert** Ribbon
2. Choose the **Link** button from Insert Ribbon
3. Choose the **appropriate notebook and page** with the information you want to link.
4. The "linked" **word or phrase will appear underlined** in your notebook. If you click this word (or phrase), it will take you to that Page in the notebook.

## Link To All The Pages In A Section



1. Click on the first page in the section.
2. **Shift-Click** on the last page in the section.
3. **Right-click** in that selection, and choose **Copy Link to Page**.
4. Go to the page where you want these links to appear and choose **Paste**.

## Link to A Page In Another Section

This example will link to the **To Do List page** in the **Templates** section of the Classroom notebook.

1. Click on the **Insert** Ribbon.
2. Choose the **Link** button from the **Insert** tab of the Ribbon.
  - a. Choose the appropriate **notebook and page** with the information you want to link to; for example, Go to notebook Classroom, choose the Templates section Templates, and choose the Page entitled To Do List.
3. The **word will appear underlined** in your notebook. The underlining refers to the link. Clicking this word (or phrase) will take you to the Page in the linked notebook.

[To Do List](#)

## Go Back To Previous Page

To return to the page you were just on, click the **Back** button in your Quick Access menu. The Quick Access Menu is at the top left side of your screen (above your Ribbon bar).

The **Back button** is the first button on the Quick Access bar.



You can customize the Quick Access bar.

*If your menu does not look like the one displayed above, click on the arrow on the right side to customize your Quick Access bar.*

*If you **cannot see your Quick Access bar** at all,*

1. Right-click on your Toolbar and
2. Choose Show Quick Access Toolbar.

## Edit Your Link

You can edit a link once you have created it. For example, you may want to edit a link to *rename* it.

1. **Right-click** on the linked item.
2. Choose **Edit Link**.
3. Change Text to Display to rename the link.
4. Also, you may want to change what you linked.
  - a. Change the notebook page you linked.
  - b. Change the file you linked.
  - c. Change the website you linked.

## Referencing Your Notes With Tags

You can use Tags to help highlight your note, just like you would highlight paper-based notes. You will find Tags on the Home tab of the Ribbon.

## Types Of Tags

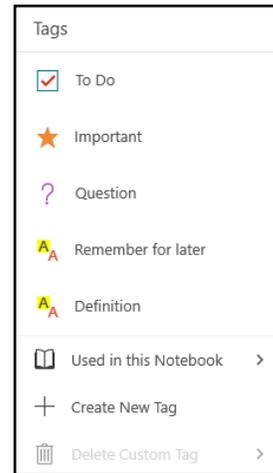
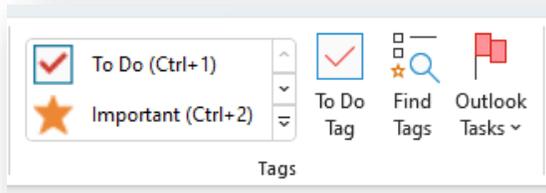
- Tag **Important** Notes (CTRL - 2) or choose Tag from the menu.
- Did you write something down and want to remember it as a **Question**? Use the Question Tag (Ctrl - 3).
- **Remember this for later** (Ctrl - 4)
- Create a **To-Do box** within your Notes (not linked to Tasks in Outlook) (Ctrl - 1)

## Create Custom Tags

To create your custom Tags or change the ones in the Tags list:

1. From the **Tags** drop-down,
2. Go to the bottom of the list and
3. Choose **Customize Tags**

Turn a Tag **Off** the same way you turned the Tag on (with the menu or shortcut keys). For example, **CTRL - 0** removes any tags you have highlighted.



*1OneNote for Windows 10*

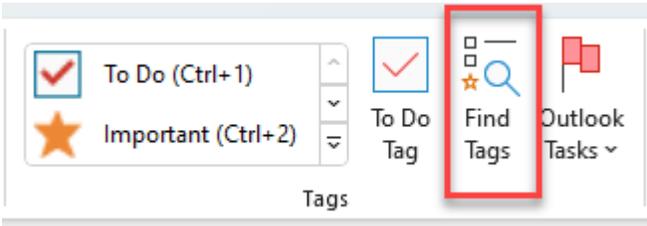
In **OneNote App**, tags are on the Home Ribbon.

Use the drop-down arrows to choose from the many tags available.

## Search for Tags

Retrieve anything fast in OneNote. With Tags, you have a new way to find information – find it based on the Tag you used!

### Searching For Tags In The OneNote App



From the **Home** Ribbon, click **Find Tags**.

The **Tags Summary** is shown on the right side of your screen when you click Find Tags.

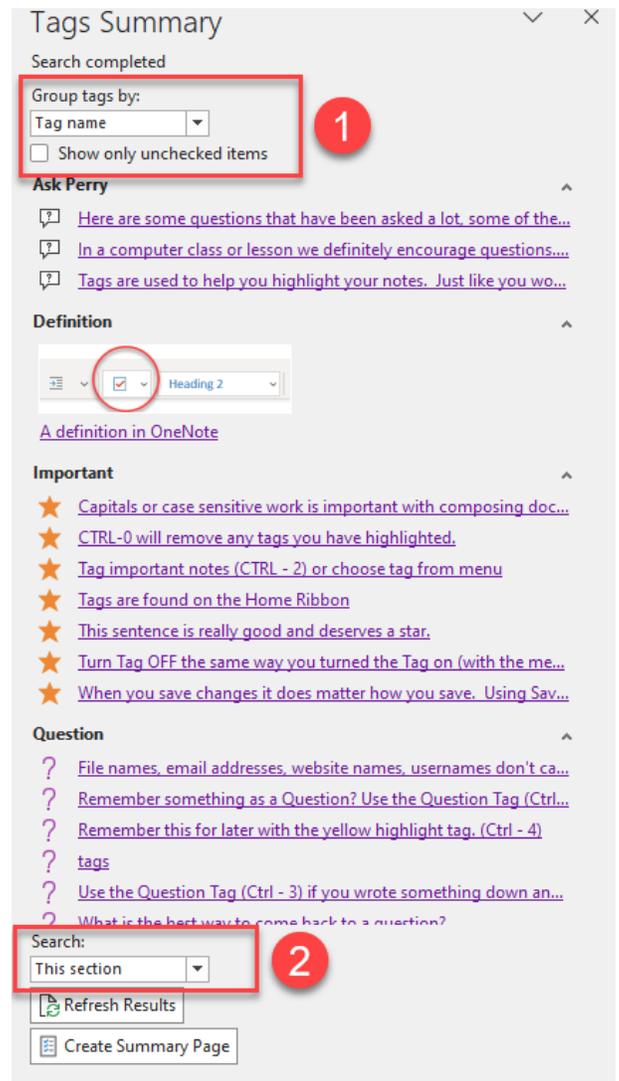
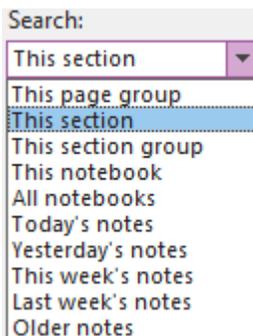
As the name suggests, you now have a summary of your tags.

But how do you want to **GROUP** these tags? From the **Group tags by box**, choose from Tag Name, Section, Title, Date, and Note Text.

Our example to the left summarizes data by **Tag name**.

Also, when summarizing your Tags, you must decide how much of a summary you need. For example, from what sections of your notebooks are you summarizing this Tag **Search**?

See all your choices below:

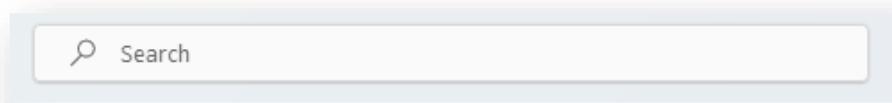


## Searching Notes

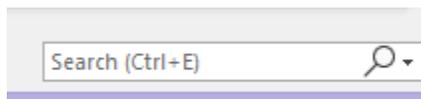
Find anything fast in OneNote with searching! Like searching for tags on your pages, you can find any text you enter. As you accumulate a lot of notes in your notebooks, searching text becomes very helpful. For example, when you know you wrote a note but can't remember where you saved it, you can search for it. Search works in the notebooks on your computer, smartphone, and tablet.

In the OneNote App, there are two Search boxes to choose from:

1. The Search box at the top of your OneNote app window, which you can access with the **Alt-Q** keyboard shortcut.



2. The Search box at the top right side of your page is accessible with a **CTRL-E** or **CTRL-F** Keyboard shortcut.



**CTRL-E** will find words by looking through all your notebooks.

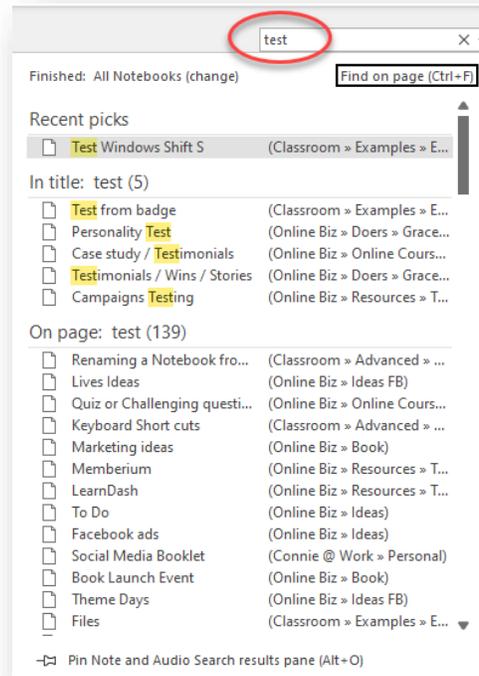
**CTRL-F** will find words by searching on the current page.

## The Search Box Or CTRL-E

When you use the search box at the top right corner of your screen, you can search for any word or phrase on the current page or all your notebooks.

Notice from the example on the right that when we search for the word **test**, we find it in many different forms:

- Recent pages visited
- As part of a page title
- As a word on a page.
- As a word on a deleted page. Though this result does not appear in the screen capture, it is at the bottom of this search box.



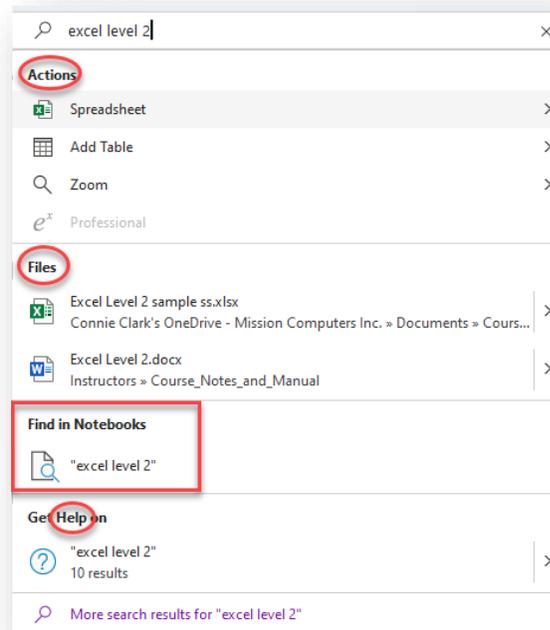
## Search Box At Top Or ALT-Q

The ALT-Q keyboard shortcut and this top search box in OneNote search for the words you enter throughout all of the Microsoft Office Apps.

ALT-Q will find files in Word, PowerPoint, or Excel that contain the phrase you are searching.

ALT-Q will find the same word or phrase in your notebooks. And you can also get help on whatever term you typed.

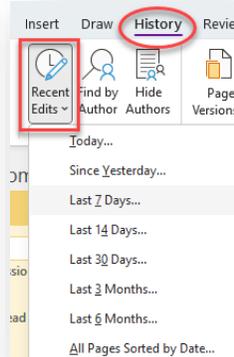
*ALT-Q may not be available on all versions of the OneNote app.*



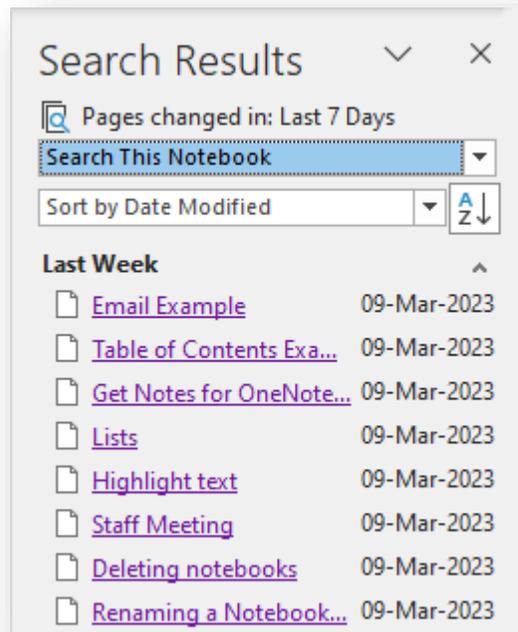
## Recent Edits Or Recent Notes

One helpful feature in OneNote App is the **Recent Edits** feature. Recent Edits us to find a list of the most recent changes to our notebooks. This feature can be handy when sharing notebooks with others or if we need to see what we added recently.

1. Click on the History Ribbon in the OneNote App.
2. Choose Recent Edits.
3. Choose the time frame you want to look at.



4. Review the list given on the right side of your screen.
5. Note that you can change whether you want to search in
  - a. this notebook or
  - b. all notebooks or
  - c. this section or
  - d. this section group.



## Extracting Information From Websites

You can copy information from a website or show a website URL in your notebook page in a few ways. These include:

- Copy the URL and paste it into your page.
- Copy a paragraph from the website, and the URL of that website is included when you paste it.
- Use a Web Clipper extension for your browser.

### Copy And Paste From A Website

When you copy text or pictures or both from a website, you can paste them quickly into a OneNote page. When you do, OneNote will also give you the URL for that website so you have the reference.

You can research a topic and copy information from websites while still keeping the website link available (or attached).

1. Go to any website and select a paragraph or more.
2. Choose **Copy**.
3. **Paste** into your OneNote Page to show the paragraph with the link to where it came from.

The screenshot shows a OneNote page titled "Website Links". The page contains several paragraphs of text about Microsoft 365 training. A red rectangular box highlights a portion of the text. At the bottom of this box, a yellow highlight contains the URL: "From <a href='\"https://missioncomputers.com/agenda/microsoftoffice/\">https://missioncomputers.com/agenda/microsoftoffice/</a>". To the right of the red box, there are two callout boxes with red arrows pointing to the highlighted text. The top callout says "This was copied from a website page." and the bottom callout says "Link automatically shows at bottom of text or area copied."

## Sharing Your Notes

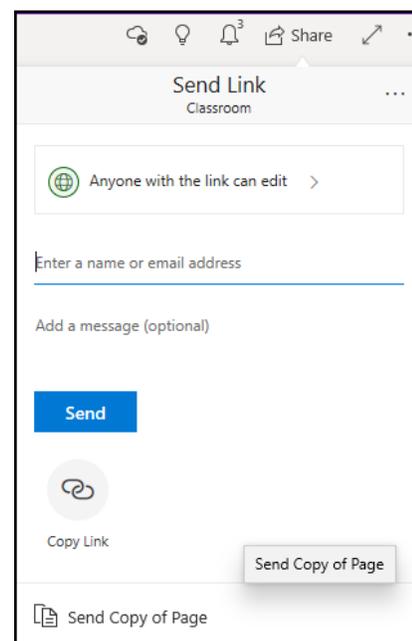
One of the key advantages of using OneNote is the ability to share your notes effortlessly with others. You have several options, such as sharing a single page or an entire notebook. Sharing a whole notebook is a breeze with the click of a button or by creating the notebook directly in Microsoft Teams. This streamlined sharing process ensures that your notes are easily accessible to anyone you share them with.

### Sharing a page of your notebook

To share a single page of your notebook, you email it to the recipient(s). Note that you'll share a final copy of the page rather than a live version.

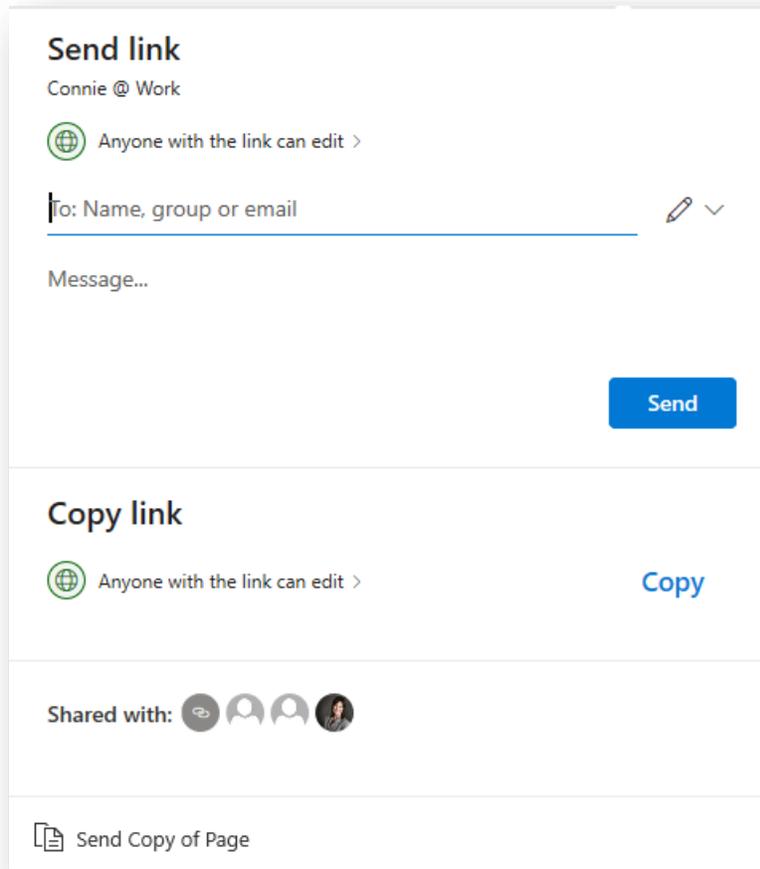
#### *Email a Page from OneNote*

1. Click on the **Share** Button at the Top Right Corner of your screen.
2. Choose **Send Copy of Page**.
3. If you have others in your organization you are sharing your notebook with, you can send a **LINK** to the Page or choose Copy Link.

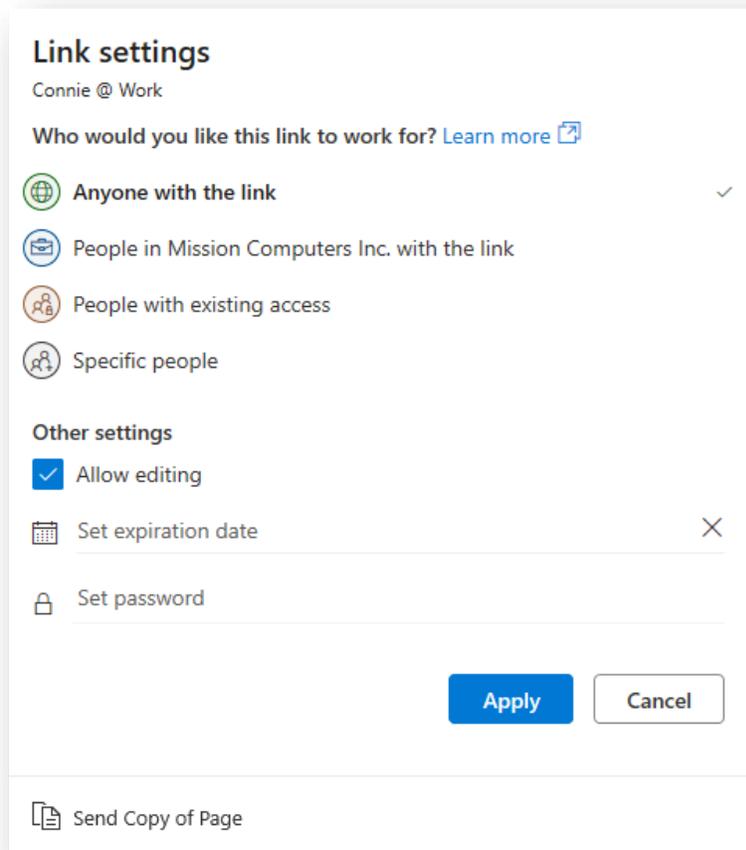


### Sharing A Notebook Link Via Email

Rather than just sending a single notebook page, you can share a link to the entire notebook via email. To do this, click the **Share** button at the top right of your OneNote app screen. See the following figure for an example of the Send link dialogue box that appears when you choose.



Before you send a share like this, you must understand the settings available to you. When you click the first option in this dialogue box, Anyone with this link can edit. The following figure represents the settings available to you.



The settings from which you can pick include the following.

- Who do you want to share the notebook with? Who do you want to have real-time group collaboration with? Decide if they are within your organization or specific people, which can be inside or outside the organization. If you choose Anyone with the link, all setting options are available.
- Are you allowing them the ability to edit any page of your notebook? Check off the Allow editing box if you are ok with them editing pages in the notebook.
- Do you want an expiration date for this share? With expiration dates, the share expires on a specific date. Upon expiration, the shared access to that person disappears from the notebook.
- A password is needed to open the notebook. This feature could provide your notebook with another layer of security.

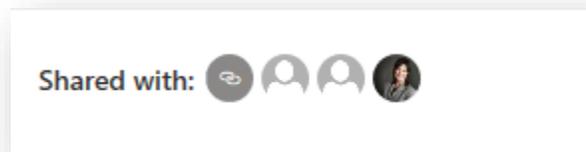
*These settings are only visible for those using OneNote in an enterprise environment with a work or school account.*

Once you have share access to a notebook, you may change your mind and want to edit or remove that access. Let's look at this next.

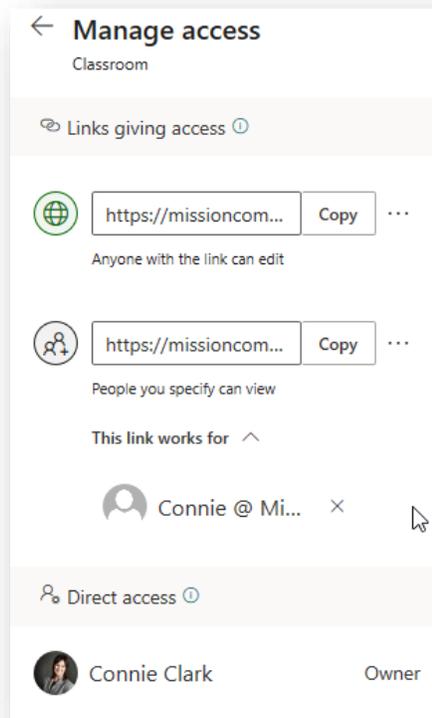
### *Editing Or Removing Shared Access*

Changes are still possible after you share access to your notebook. For example, you can edit that access or remove that person from the share. The steps for editing or removing user access from the shared notebook are listed below.

1. Click **Share** at the top right corner of the notebook and notice the shared access as depicted in the screen capture below.



2. With your mouse, hover over any user icon in the **Shared with** area, and click the icon representing the user you wish to edit.
3. The **Manage access** area opens up so that you can make changes to the share, see the following figure for an example of the Manage access dialogue box:



4. Click on the ellipsis to the right of the links and copy boxes. Each of these menus provides a separate prompt. For example, one prompts for setting an expiration date and another for editing access rights.
5. Under the Manage access dialogue box links, you have access to the user for the share. As shown above, the username shows as *Connie @ Mi...* and has an *x* beside the username. If you click on this *x*, you will remove this user from sharing the notebook. If you do not see a username in this box, look for the user icon and click on the down arrow beside that user icon.

### Sharing Notebooks Via Teams

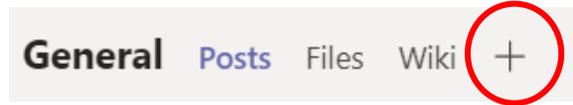
OneNote notebooks are an integral part of Microsoft Teams. Sharing notebooks with team members is easy. By leveraging the integration, teams can create and share real-time notes, ideas, and meeting minutes, promoting seamless collaboration.

The OneNote tab in Teams provides easy access to notebooks within any Teams Channel. Using OneNote notebooks within Microsoft Teams provides a powerful tool that helps your teams work more efficiently and effectively, improving productivity and teamwork.

You can add OneNote easily as an App to a Teams Channel.

To Add the OneNote Application:

1. Click on the Team and Channel where you want OneNote to reside.
2. Click on the **Plus Sign (+)** at the Top of the Channel Posts area.
3. Choose **OneNote** from the apps listed (search for OneNote if it does not show on your screen immediately).
4. Choose the **default** notebook that is listed. *Every Team created has a default notebook.*



Once you start using this notebook in your Teams environment, everyone in the Channel can add to the notebook. You are automatically sharing with the entire team.

### SharePoint and Notebooks

OneNote notebooks are a standard part of a SharePoint site and are available to users by default. Notably, when you create a new SharePoint site, a corresponding OneNote notebook appears automatically. Therefore, team members can use OneNote to capture and share ideas without additional setup.

The OneNote notebook is accessible from within the SharePoint site, and team members can work on the same notebook simultaneously, allowing for real-time collaboration. In addition, OneNote provides an organized and efficient way for team members to store and access information, ensuring everyone is up-to-date and on the same page. With OneNote notebooks as a standard part of a SharePoint site, teams can work more effectively and efficiently, ultimately improving productivity and results.

Look in the navigation area for the Notebook.

SharePoint Search this site

**Work Remotely**  
Public group

+ New Page details Analytics

**News**  
+ Add

**Keep your team updated with news on your team site**

From the site home page you'll be able to quickly author a news post - a status update, trip report, or...

[Add News](#)

**Activity** [See all](#)

**Shared Documents**

Agenda-OneDrive-Cloud\_65610

**Connie Clark**  
Viewed about an hour ago

**Shared Documents**

10-Apps-Tool---Tips\_44623

**Connie Clark**  
Viewed 22 days ago

**SitePages**

Tech Tips

**Connie Clark**  
Viewed July 23, 2021

**Left Navigation Menu:** Home, Conversations, Documents, **Notebook** (highlighted), Pages, Tech Tips, Site contents, Recycle bin, Edit

## Conclusion

In conclusion, OneNote is a versatile tool that you can use for various tasks, from organizing notes and ideas to storing and retrieving important reference information. Throughout this presentation, we have explored various OneNote can help individuals and teams reduce email and collaborate more efficiently. In addition, we discussed the benefits of sharing a page or notebook with others and the features of OneNote that make it easy to organize and find information quickly.

Some of the critical features of OneNote that we have covered include sections and pages, sending emails into OneNote, tagging and searching for tags, searching for information, and storing documents and links. Additionally, we have emphasized the importance of using OneNote on multiple devices, as it allows for seamless collaboration and access to information no matter where you are.

Lastly, we have outlined the process for acquiring OneNote and highlighted that it is available on many devices. So whether you are an individual looking to organize your personal life, or part of a team looking to streamline collaboration and communication, OneNote has something to offer. With its user-friendly interface and powerful features, OneNote is an excellent tool for staying organized, productive, and connected.