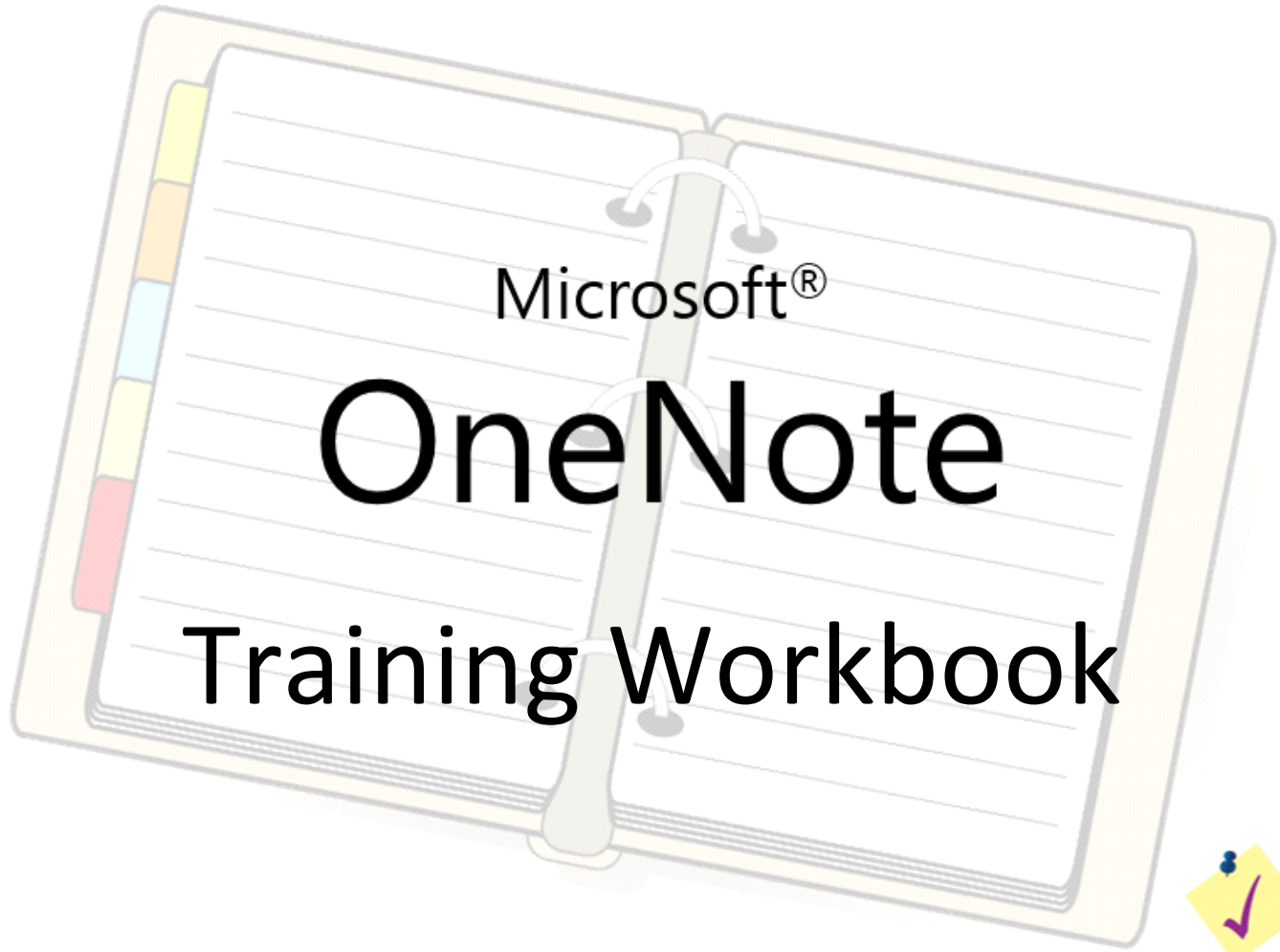


**Business Made Simple**

*Big Solutions for Small Business*



*Use this workbook to follow along with "Organize Your Business & Life - OneNote Video Training", by Business Made Simple. Take notes, jot down ideas, and keep this for quick reference as you begin to learn the many uses of OneNote.*

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# Why Use OneNote?

It can help you organize your business, reference information, reminders, plans, projects, computer files and pretty much your whole life...



OneNote can help manage just about *everything*...



Some things I'd like to organize are:

# OneNote Uses

## Some things that OneNote is good for:

- Keeping everyone on same page
  - Shared communications
- Easy access and sharing of company information
  - Customer notes, time sheets, calendars, passwords
- Meeting minutes
  - You can create a template for this
- Project Management
  - Another good way to use templates
- Company mission statement, goals and plans
  - Marketing, operations, finance, etc.
- To Do Lists for home, office, community activities
- Personal notes and reminders
- Product & Service information and specifications
- Reference & Resource information

### What OneNote is not:

- A Database (can't sort and run reports)
- An Excel Spreadsheet - although can embed one or link to one

## Other great uses for OneNote:

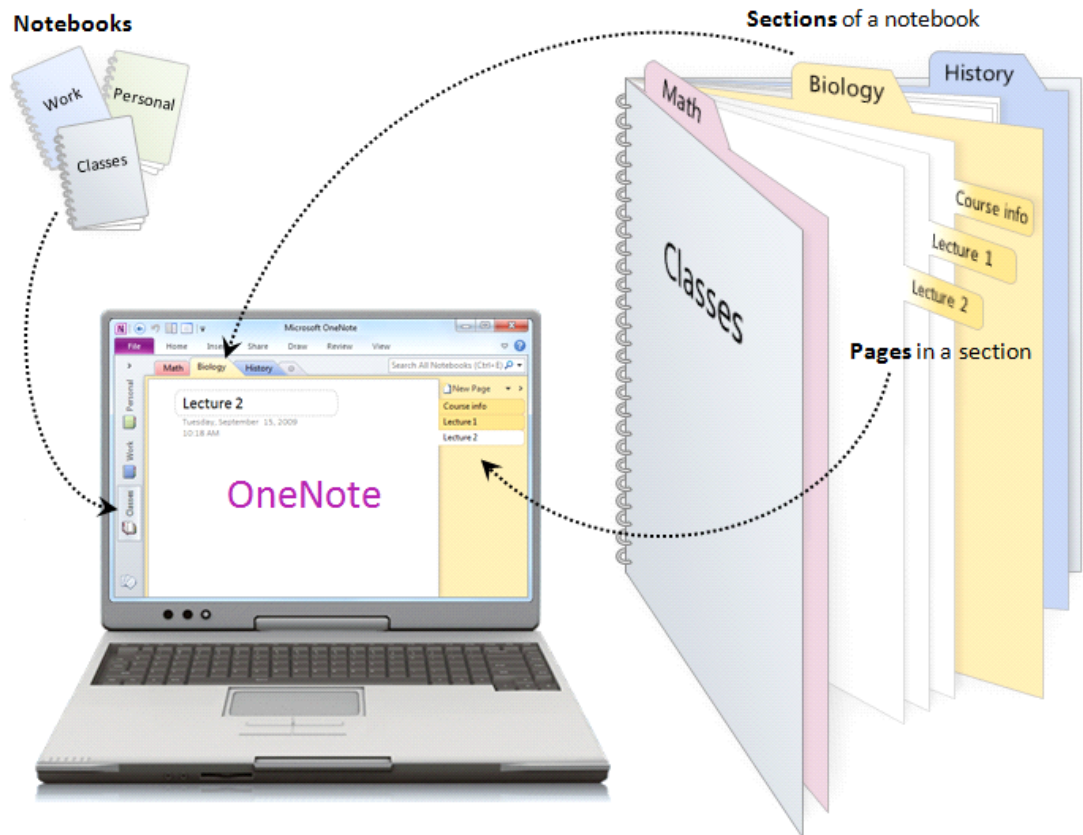
- Policy manuals
- Personnel reviews
- Procedures and workbooks
- Webinar and training notes
- [Recipe Book](#)
- Vacation planner
- Medical history

*See the last pages in this workbook for more ideas for using OneNote at work, home, and school.*

# OneNote Layout

OneNote is divided into:

- Notebooks
  - Section Groups
    - Sections
      - Pages
        - Subpages



Think of it as an electronic form of a very flexible notebook where pages and sections are as long or short as you need them to be and where they can be moved around at any time.

# How Many notebooks do you need?

Spend some time brainstorming the possibilities for sharing and storing information in a way that makes the most sense for your business and your life...



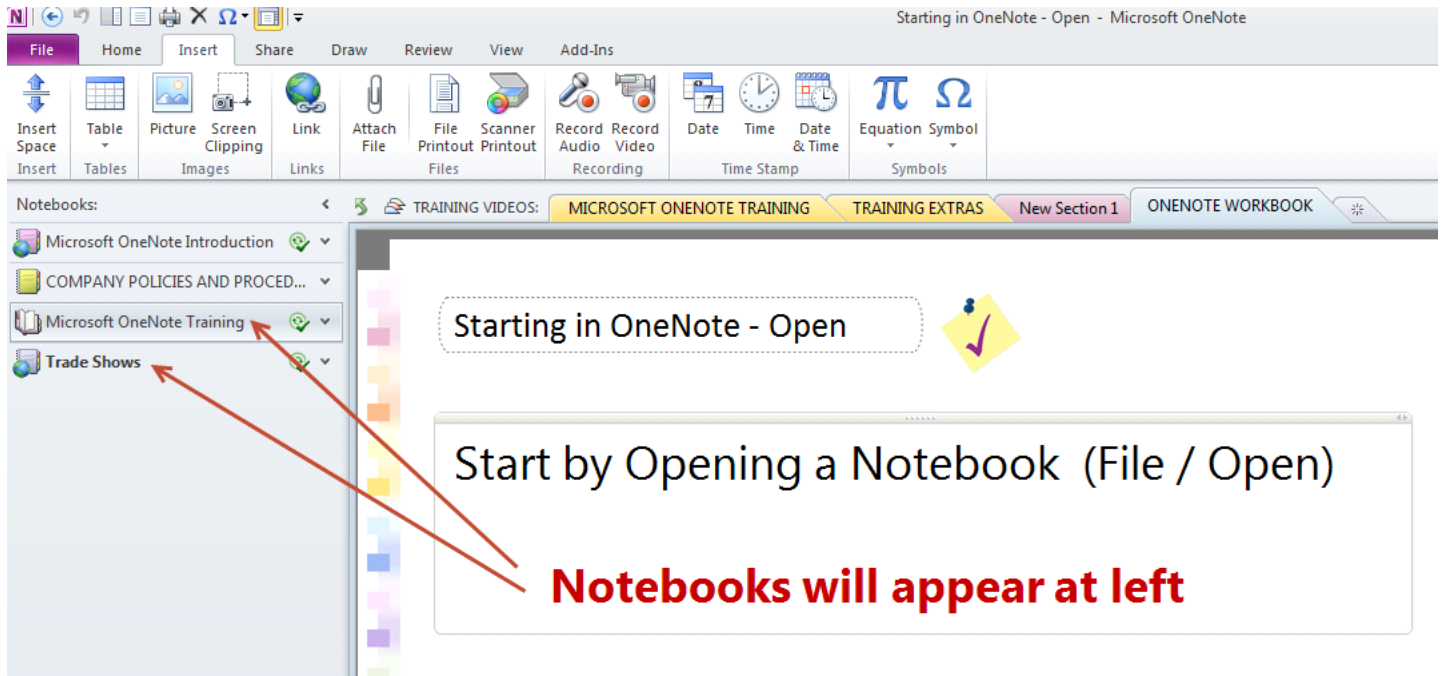
There's no right answer for how many is the right amount. It really depends on things like:

- ◇ Who will use the notebook?
- ◇ How much information will collect over time?
- ◇ How easy will it be to navigate the sections and pages to find what you need?

Notebooks that would be useful to me:

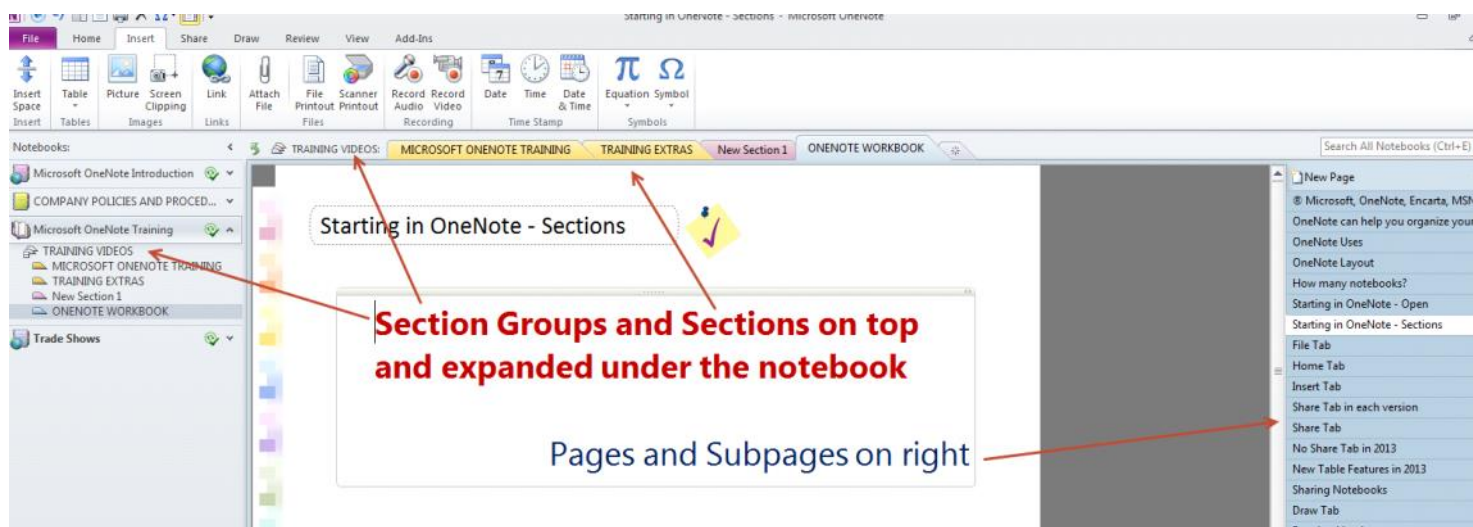


# Getting Started



The first time you use OneNote you'll be prompted to fill out your name and then a default example notebook will open up. You can create a new notebook from the File tab.

Section groups and sections show up on the left side, pages on the right.



# File Tab Options



## Info

Which notebooks are open, notebook settings, share settings, sync setting, open backup

## Open

To open a notebook that is not already open

## New

Create a new notebook. Can choose how to share it: web/network/just you

## Share

Change the sharing of any notebook.

## Save as

Can save in various formats such as Word or pdf.

## Send

Send as e-mail to someone or to your blog.

## Print

Print or print preview.

## Help

Easy access to tutorials, articles and shortcuts.

## Options

Options for customizing OneNote. Suggest operations or IT manager select suggested "company options" and set up on each OneNote.

## Exit

Another way to close OneNote

# Home Tab Options

This is where you will work from most of the time.

When a tab is selected, the ribbon changes, but not the notebook.



Once you create a page, you can start typing anywhere.

You can create separate text boxes and move them around easily.

## 5 Main Home Tab Sections

- **Clipboard**
- **Basic Text**
- **Styles**
- **Tags**
- **Outlook**

### Clipboard functions

- Cut
- Copy
- Paste
- Format Painter



# Home Tab Options

**Styles** allows you to quickly select common formatting.



**Tags** A tag is a way to label a word or picture in order to identify it and find it later on. It's a way to categorize your information.

- ! Tags can help you locate prioritized things to do.
- 💡 Tags allow you to categorize.
- ☑ The Checkboxes are a favorite.
- 💬 You can have more than one tag.
- 🌻 You can create your own tags.

## Outlook



Assign an Outlook task to a note.



E-mail pages directly from OneNote

# Insert Tab Options

**Insert Space:** Insert or remove writing space.

A useful tool for inserting or reducing white space.

This can be helpful to gain more room on your note page.

**Table:**


**Images:**

Picture

Screen Clipping

**Links:**

Link text or picture to a website or another place in OneNote.

**Files:**

Insert a link or the actual text. Scan anything into OneNote.

Everything becomes searchable.

**Recording:**

Record audio or video.



Insert Tab

**Time Stamp:**

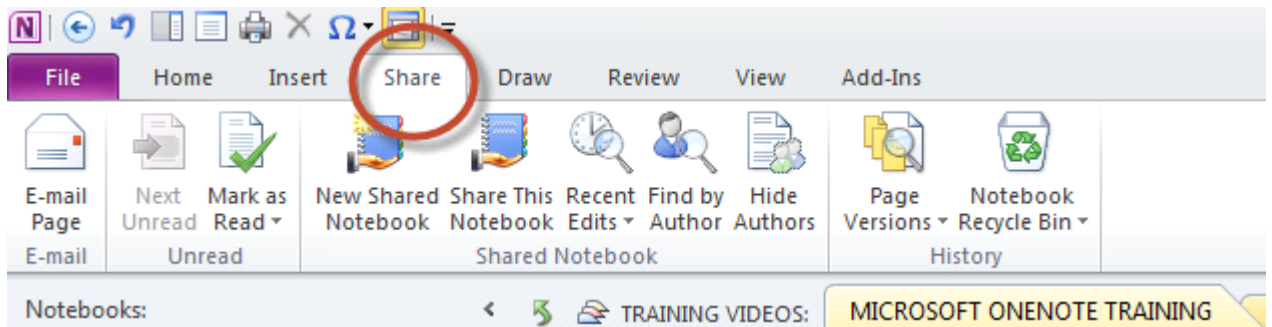
A shortcut for entering dates and times. Perfect for timesheets.

**Symbols:**

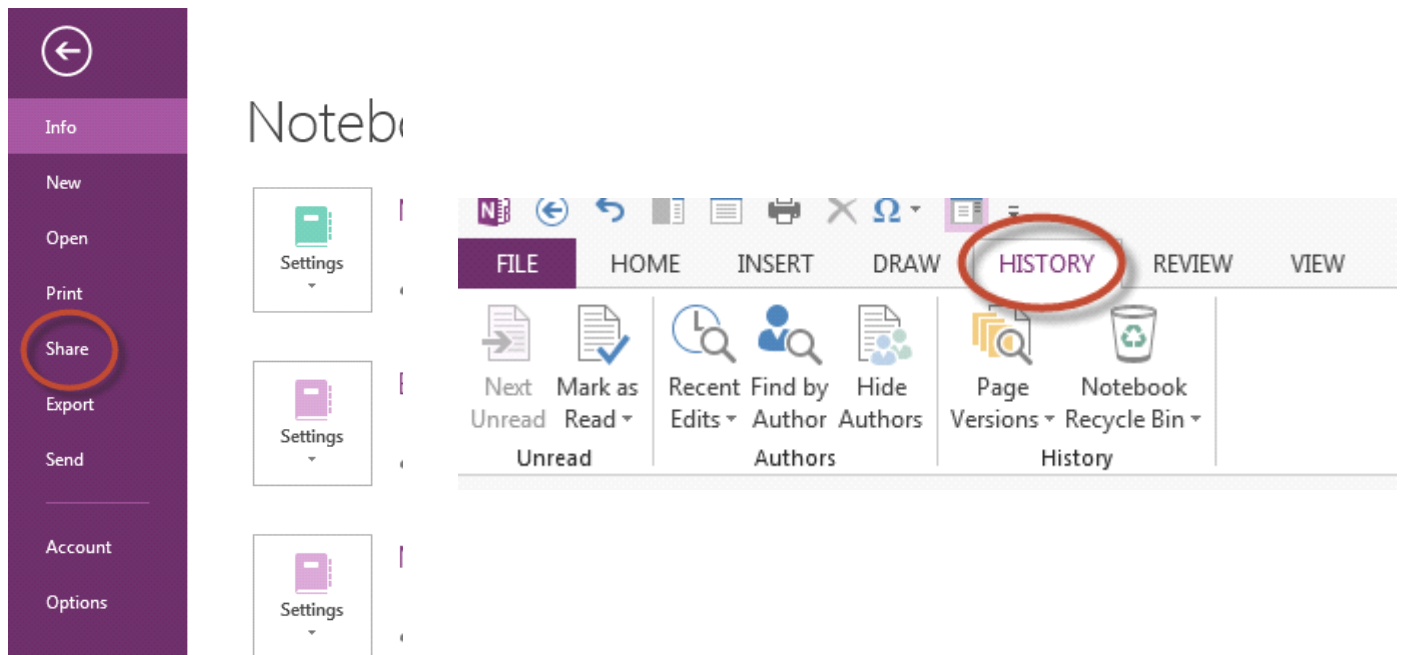
Easy way to insert symbols. For example, use for the copyright symbol (©).

# Share Tab (in each version)

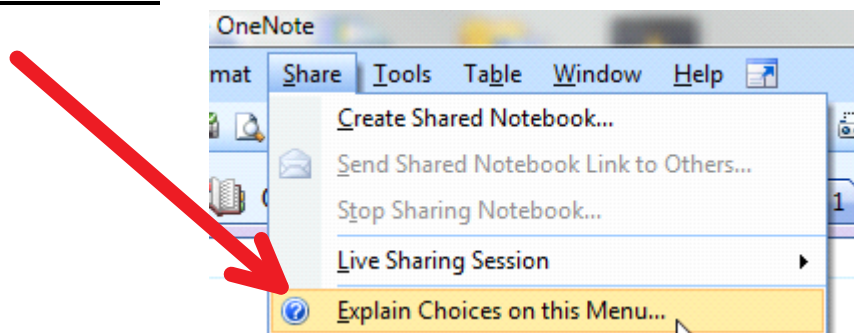
## Microsoft OneNote 2010



## Microsoft OneNote 2013



## Microsoft OneNote 2007



# Share Tab




*These are the things you can do under the Share Tab:*

- ◇ E-mail a page to someone
- ◇ Create a Shared Notebook or Share one that's already created
- ◇ See what edits have been done in OneNote
- ◇ Find who authors are
- ◇ Search what else author has written
- ◇ Look at additional history such as version and recycle bin

You can  
password  
protect any  
section of  
OneNote.

Right click on the  
section tab,  
select Password  
Protect This  
Section.

# No Share Tab in 2013

- E-mail a page to someone **NOW JUST ON THE HOME TAB**
  - Create a Shared Notebook or Share one that's already created **IN THE FILE TAB**
  - See what edits have been done in OneNote
  - Find who authors are
  - Search what else author has written
  - Look at additional history such as version and recycle bin
  - **Save As on the File Tab is now called Export**
  - **Full Page View - great new tool**
- 
- NOW ON HISTORY TAB**

# Sharing Notebooks

By sharing notebooks on the web or on your network, other people can work on the same notebook at the same time



All web notebooks are shared through Microsoft SkyDrive

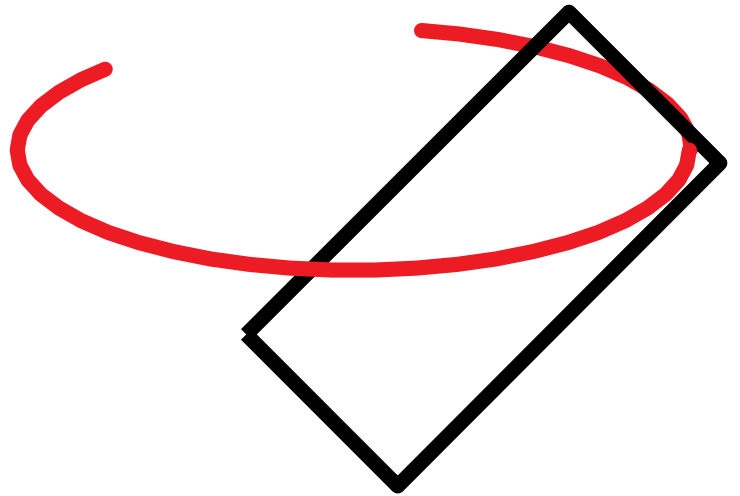
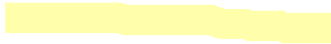




# Draw Tab Options

## Tools

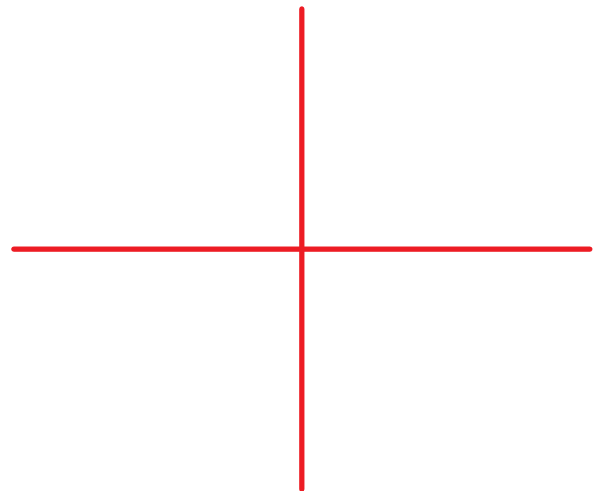
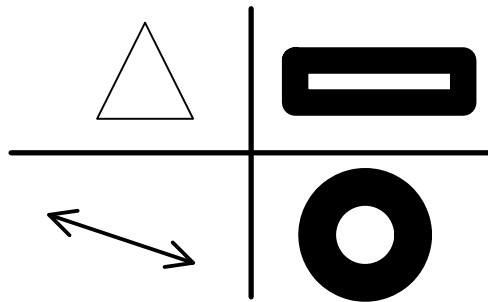
- Erase portions of shapes
- Lasso Select
- Panning Hand - scroll easier within OneNote
- Pens & Highlighters



Use the Draw tab to highlight using free hand. Use the Home tab to select text and highlight evenly.

## Insert Shapes

Insert basic shapes quickly and easily. Select line thickness and color too.



## Edit

- Insert space (same as on Insert tab)
- Delete anything you select
- Arrange front to back
- Rotate items

## Convert

Convert ink to text, or ink to math symbols

# Panning Hand

You can scroll way to the right or left, and up and down, by using the panning hand which can be quicker than the scroll bars.



# Review Tab

## **Spelling**

- Check spelling of page or section.



## **Research**

- Quickly research a topic on the internet
- Look up a definition
- Use a Thesaurus



## **Language**

- Översätta till andra språk.
- Select language options.



How are you?

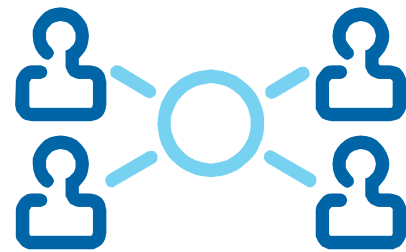
Online Bilingual Dictionary

how

wie; how are you? wie geht es dir?; how about ...?  
wie stehts mit ...?, wie wäre es mit ...?; how do you  
do? bei der Vorstellung: guten Tag!; how much?  
wie viel?; how many wie viele?

**The Language tools are useful when writing advertising and promotional materials for global markets or when working with international customers or branch offices.**

# Review Tab



## *Linked Notes*

- Take notes on the side of a webpage, PowerPoint presentation, another OneNote page, or any other window.
- These notes will be automatically linked to the item you are looking at.



- Webinars
- Documents
- Manuals
- Videos



# View Tab



## Views

Can toggle full page view from Quick Access Toolbar

*Customize your Quick Access toolbar through Options or through the Quick Access toolbar itself.*

## Authors

Click on Hide Authors to see Authors initials.

Click again to hide the authors.

If no initials - you are the author.

## Page Setup

Page Color (does not print)

Rule Lines (these do print)

Hide Page Title (deletes it)

Paper Size (and margins)

## Zoom

Zoom in/out for easy viewing

## Window

New Window creates an entire copy of the OneNote Window - great for two projects at once

New Docked Window - good for taking notes

New Side Note (temporary) - can also use Sticky Notes

Keep on top if use more than one window

## **View Tab: Views**

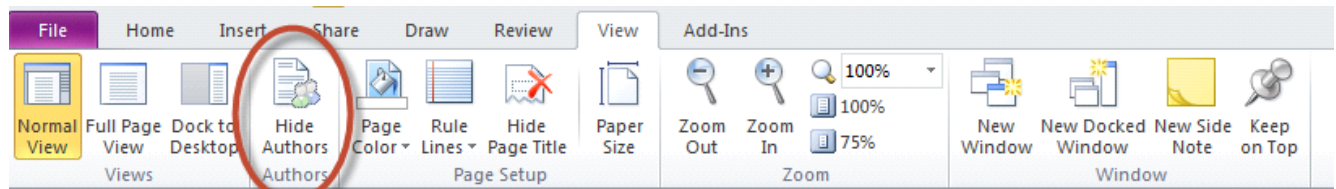
- ✳ Normal view displays the navigation bars and the feature ribbon
- ✳ Full Page view hides the navigation bars & the ribbon for a clear view of your page
- ✳ Dock to Desktop docks it to the side of your desktop so you can work in other programs while still having your notes open.

# View Tab: Hide Authors

This is how OneNote indicates changes from another person. Changes are synced either through your network or through the web



**When you click on Hide Authors, the initials disappear.**

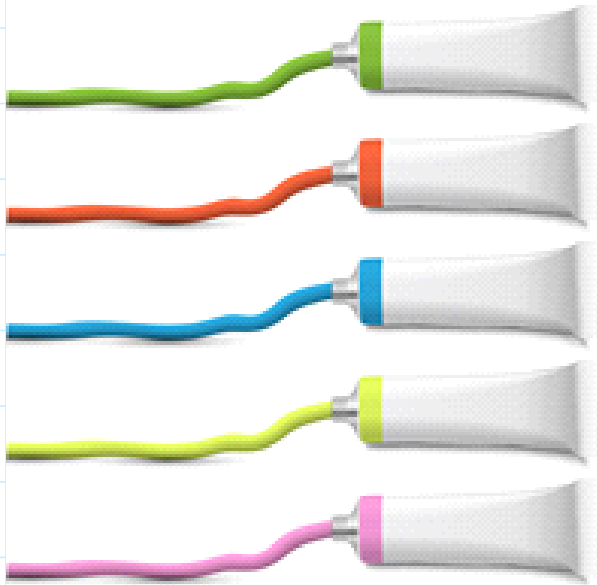


This is how OneNote indicates changes from another person. Changes are synced either through your network or through the web



# Page Options

Add some color to your page!



Add some grids or lines to your page...

*Have Fun!*

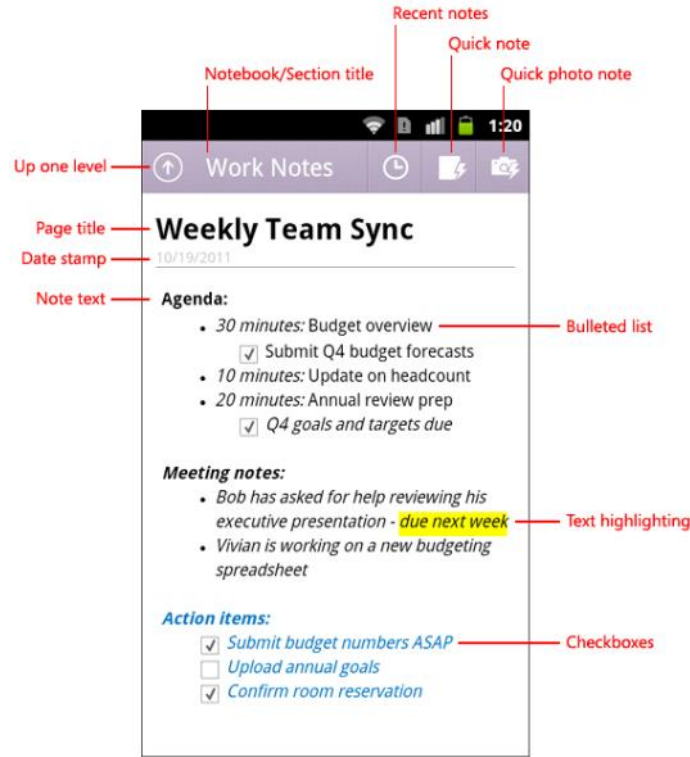
# Additional Functions/Features

Friday, February 17, 2012  
1:32 PM



OneNote automatically enters date and time created. You can delete them.

## OneNote Mobile - Droid & iPhone



## Write a book



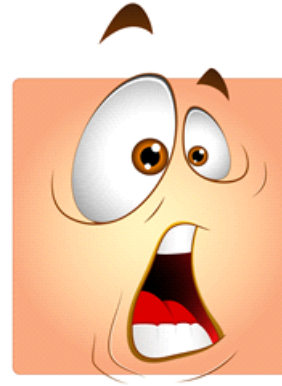
## Video about OneNote:

<http://microsoft.com/showcase/en/us/details/f95fca1d-e3f9-4709-9dfe-5fc982906771>



# Summary

- ▶ Don't be afraid of OneNote.
- ▶ You can't break it.
- ▶ Worst case scenario - you delete something.
- ▶ If you do, click undo





# OneNote References

- Microsoft Office:  
Changes from 2007 to 2010 to 2013  
[http://technet.microsoft.com/en-us/library/cc179096.aspx#BKMK\\_New](http://technet.microsoft.com/en-us/library/cc179096.aspx#BKMK_New)
- Business Made Simple with Microsoft OneNote Blog:  
<http://onenotemadesimple.com/2012/11/10/improvements-in-onenote-comparing-200720102013/>

# OneNote for Work



- Daily Tasks
- Corporate Books that have
  - Copy of Business Plan
  - Strategic Goals
  - Copy of important documents (Articles of Incorporation or Organization)
  - Financial snapshots
  - Keep mission statement in front of employees
- Password Log (sections can be secured)
- Standardized Forms such as:
  - Customer Profile
- Policy Manuals & Employee Handbooks
- Procedure Manuals including:
  - Step-by-step process for job tasks
- Checklists for:
  - Training
  - New Hire Procedures & Checklists
- Project Management
  - Can easily track and send back and forth to team members
- Product Sheets
- Marketing
  - Tracking Domain Names
  - Product Features and Benefits
  - Trade Show Checklists
- Customer Data
  - Profiles & Call Notes
  - Agreements
  - Policies
  - Track customer requests
- Meeting Notes
- Resources & Research including copies of websites and links to external articles
- Training Programs
- E-Guides

- Regulatory Issues
- Infographics
- Ideas & Thoughts - Brainstorming
- Flow charts
- IT Notebook
  - List of all computer equipment and software
  - Registrations and license information
  - Links
  - Repair and troubleshooting

## OneNote for School

- Class Notes (can be taken right in class on a tablet, laptop or smart phone)
- School Year Schedules & Deadlines
- Track credits needed for degree completion
- Reports & Projects
- Research Projects
- Career research





# OneNote for Home



- Chore list/table
- Daily Tasks
- Upcoming events linked to calendar (Outlook)
- Grocery List Template
- Medical Information including
  - Clinic locations, doctors and phone numbers
  - Medication Charts
  - Allergy List
  - Health History
  - Appointment Records
  - Insurance information (numbers, co-pay, premium, etc)
  - Tables for tracking medications & vitals
- Dental Log
- Meal Planning & Recipes
- Dreams & Life Lists
  - Make a checklist of what you want to accomplish in your life
- Visualization Board
- Address & Phone Number Lists
- Christmas and Birthday Lists
- Party Organization
  - Theme
  - Checklists with timeframes
  - Guest List
  - Food / Menu
  - Cleaning List
  - Grocery List
- Write a Book
- Poetry
- Journal
- Pet Log
  - When and where purchased
  - When shots
  - Photos as they grow

- Travel Planning
  - Checklists
  - Itineraries
  - What to pack
  - Flight/Hotel Arrangements
  - Directions
  - Budget / Costs
  
- Yearly Home Maintenance
  - Spring and Fall Cleanup Checklists
  - Reminders to change light bulbs, filters and batteries
  
- Ideas & Thoughts
  
- Wedding Planner
  
- Budgets & Financial Data
  
- In Case of Death (important information your spouse/family should know)



# ONENOTE MADE SIMPLE

For additional resources and learning tools, visit our blog at

[www.onenotemadesimple.com](http://www.onenotemadesimple.com)

For comments, suggestions or questions, please e-mail us at

heartofonenote@gmail.com

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