BetterCloud
Powering Cloud IT

The Ultimate Guide to
OneNote

A Training Guide for OneNote Users from BetterCloud

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Introduction

OneNote is Microsoft's free-form note-taking application.

You can take basic notes, but you can also take your notes and organization strategies to the next level with drawings, screen clippings, images, links, and embedded files.

Beyond basic note-taking, OneNote can also be used in academia, for project management, and for one-off items like to-do lists, outlines, shopping lists, and journals. It integrates well with other Office apps and is also known for its powerful search functionality.

Office 365 users can access several different versions of OneNote. The version you use depends on your individual needs and preferences.

This guide will provide tips, tricks, and comprehensive resources for using OneNote no matter your experience level or industry.

What's the Difference Between the OneNote Versions?

If you have a PC, you most likely have two versions of OneNote installed. You also have access to OneNote Online, and you might use OneNote on a mobile device or your Mac. While basic functions are consistent across all versions, understanding that there are different versions can help avoid confusion.

OneNote 2013/2016 for PC

OneNote 2013 and OneNote 2016 are the most full-featured, and they're the versions that are usually being referred to when simply "OneNote" is used. In fact, the only feature that it lacks is the radial menu (which is intended for touch devices).

If your Office 365 plan includes installed desktop versions of Office applications, or if you buy a standalone Office 2013 or Office 2016 suite, this is the version of OneNote you'll have. While OneNote 2016 is the latest version of the application, many users still use OneNote 2013, and there are very few differences between the two. Versions prior to 2013 won't be addressed in this guide. Anyone can now get the full-featured version **free from the OneNote site**.

What's the Difference Between the OneNote Versions?

Windows 8/10 OneNote App

Windows users may find that they actually have two versions of OneNote on their computers. That's because Microsoft includes a free Windows version that comes pre-installed. You may have heard it called the "metro" or "store" version of OneNote. Sharing, password protection, picture editing, and ribbon/menu configuration may be lacking in the Windows versions. You can read up on the differences **here**.

OneNote for Mac and Mobile

Microsoft does make a dedicated version of OneNote for Mac, which you can check out in the **Mac App Store here**. From **the OneNote site**, you'll also find links to Windows Phone, iOS, Android, and Amazon versions. All of these versions allow you to take basic notes, but features beyond that will vary.

OneNote Online (Web App)

OneNote Online lives alongside other Office 365 web applications, and like Excel Online, Word Online, etc., lacks many features of the corresponding desktop versions. If you have a Microsoft account and access to a browser, you can use OneNote Online, but we recommend only using it when alternatives are unavailable.

Getting Started with OneNote

When you first open OneNote, you'll likely find it pretty intuitive. Its interface looks and acts like a three-ring binder, with **notebooks** (the binder), **sections** (tabs), and **pages**. A notebook can have multiple sections or just one; a section can have multiple pages or just one, too. Most people are referring to a page when they say "note" in the context of OneNote.
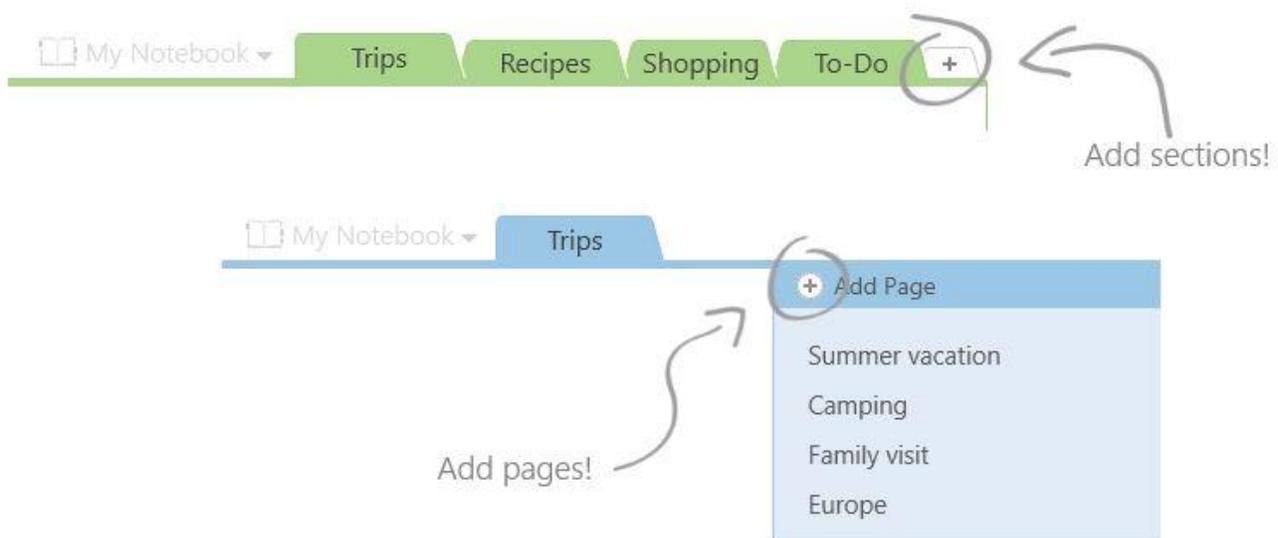
(images from Microsoft)

You can create as many notebooks, sections, and pages as you like. You'll also always have access to a tab called **Quick Notes**, which is a default section for storing bits and pieces that you may keep, delete, or move. In OneNote 2013/2016, pressing the Windows key + N opens up a Quick Note even if OneNote isn't running. **Learn more about Quick Notes here**.

Getting Started with OneNote

Ready to get started? These posts and videos cover basic tasks you'll perform frequently in OneNote.

- To create your first notebook and get a quick refresher on OneNote basics, follow **these instructions** from Microsoft. (Note that the video refers to OneNote 2013, but the steps and details are the same for OneNote 2016.)

- If you're using OneNote Online, check out Microsoft's **list of basic tasks for the web browser**.

- **Save and sync notebooks to OneDrive**: Your OneNote notebooks will most likely live in the cloud. This video provides an overview of the basic process that you can use with OneNote to create a new notebook and store it on your OneDrive for Business account. Reminder: OneNote doesn't have a Save command, because whether you're storing in the cloud or not, your work is automatically saved.

- There's a variety of ways to link in OneNote. **This video post shows you the options**. Remember your secret weapon: Ctrl + K.

- **Two easy ways to take screenshots**: OneNote handles images with ease—you can insert or paste in images and even edit them in 2013/2016—and you also have a couple of easy ways to include screenshots in your notes.
    - If your screenshot or image includes words, you can **pull text out** (from the image to your clipboard) like magic!

- **How to capture audio and video without leaving OneNote**.

- **Master list of adding content to OneNote**: Have a question on how to add _____? It's probably there.

- Do you want to keep certain content away from prying eyes? Check out **how to password-protect OneNote** for instructions and some exceptions.

- **Introduction to OneNote search**.

Sharing and Collaborating

Depending on where and how you use OneNote, you might create a lot of notes for your eyes only, but you also might use notebooks and pages for sharing and collaborating with others. OneNote, like all other modern Office applications, is designed for sharing.

- The Office team provides **these basic steps** on sharing your notebooks. If you prefer, you can **email your OneNote notes pages**.

- Need to share with someone who doesn't have a Microsoft account? If you create a view link, your recipient will be able to open it in OneNote Online in the browser (no account required). Alternatively, you can **export your notes to PDF** and share the PDF.

- For more advanced sharing scenarios--for example, sharing a notebook with a team but setting aside one locked-down section where only a select few can collaborate--check out **these instructions**. (Here's more on **creating private spaces**.)

- **Tips on using OneNote and SharePoint together**.

- **How to use OneNote to take awesome meeting notes**: Unavoidable and sometimes tedious, taking meeting notes is probably not your favorite activity. But OneNote makes it easy to take notes, include important details and action items, and distribute notes to other meeting participants.

- **Use OneNote for a business training (as a student)**.

- **Use OneNote for a business training (as a trainer)**.

- If you need to stop sharing a notebook, **here's how**.

Organizing and Customizing

OneNote organizational strategies are as varied as OneNote users. This section contains some of our favorite elements for organizing and customizing your notebooks, but you're sure to develop some of your own.

Lists and tags

- **Create to-do lists**
- **Make and share shopping lists**
- **Create custom tags**

Types of notebooks

- **Wedding planning (another take)**
- **Tracking family information**
- **Meal planning**
- **Recipe collection**
- **Genealogy research**
- **Collaborative writing project**
- **Budgeting**
- **Travel and vacation planning**
- **Holiday planning**

Customizing

These customization tips apply to Office 2013/2016 in general, and implementing them in OneNote can create a more personalized (and therefore more pleasant and productive) experience.

- **Change the default font type and size**
- **Disable/remove the start screen**
- **Customize the quick access toolbar**
- **Minimize or auto-hide the ribbon**
- **Disable automatic bullets and numbering**

Integrations and Add-ons

Human cannot live on OneNote alone! OneNote integrates with many other elements of the Office suite, and you can also find great add-ons to extend its capabilities.

Integrations with Office

- **Take Linked Notes**
- **Create an Outlook 2013/2016 task from OneNote**
- **Outlook and OneNote together for project management**
- **Embed an Excel spreadsheet in OneNote**
- **Add a Visio diagram to a page**
- **Export your notes to PDF**
- **OneNote & Sway**

Add-ons and apps

- **Office Lens**: A pocket scanner that sends to OneNote.
- **OneNote Clipper extension for Google Chrome**
- **Onetastic for OneNote**: Added functionality like calendar, custom styles, and more.
- **OneNote channel on IFTTT**
- **OneNote and News360**: Capture news stories to read later.
- **OneNote + Feedly**
- **Connect OneNote to other apps with Zapier**
- **OneNote featured apps**

OneNote for Education

OneNote is a powerful tool for educators, teachers, trainers, and students. It's so powerful, in fact, that Microsoft created **an entire site dedicated to OneNote in Education** (that's worth checking out for everyone) and a special tool for teachers and students, the **OneNote Class Notebook** (and **Staff Notebook**).

Class Notebook
- **Staying organized**
- **Creating interactive lessons**
- **Collaborating and providing feedback**
- **Integrate Class Notebook with an LMS**

Additional resources
- **Back to school with OneNote webinar**
- **Cool examples of teachers using OneNote in education**
- **OneNote—the Swiss Army Knife of education**
- **How OneNote can evolve education**
- **OneNote—triangulation of evidence for learning and building 21st-century skills**
- **Bringing the teaching portfolio to the 21st century with OneNote**
- **OneNote—a platform for creativity, collaboration, and communication**
- **Learning adventures with the new Mystery Skype OneNote Notebook**
- **How a Macedonian teacher incorporates mobile technologies and OneNote in her classroom**
- **OneNote Class Notebooks have redefined the instruction at my school**
- **Our secret weapon—OneNote for sharing, collaborating, and assessing**
- **OneNote Class Notebook for blizzard bag management**
- **Universitas Gadjah Mada—enhancing learning and distance education with Office 365**
- **Our journey with OneNote**
- **OneNote to rule them all**
- **OneNote—the ONE tool I can't do without (and neither can my school)**
- **Sammamish High School—six months of OneNote Class Notebooks**

Conclusion

With OneNote, the possibilities—for note-taking, content creation, collaboration, sharing, teaching, and learning—are endless. We hope this guide provides you with a foundation for using OneNote to make you more productive.

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*Note: This document will be updated over time. Please check back to see the updates.