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SEE-HOW guide!

Microsoft

# Plain & Simple

# Microsoft OneNote 2013

Peter Weverka

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Learn it.
In color.

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- Record and play audio and video notes
- Customize OneNote and get your work done faster

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- Get handy *tips* for new techniques and shortcuts
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*Microsoft Office/*
*Microsoft OneNote*

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# OneNote 2013 Plain & Simple

*Peter Weverka*

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# Contents

Acknowledgments . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . xiii

1 About this book . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . **1**

No computerese! . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2

The path of least resistance . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 3

A quick overview . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 4

A few assumptions . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 5

What's new in OneNote 2013. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 6

Adapting task procedures for touchscreens. . . . . . . . . . . . . . . . . . . . . . . . . . 19

A final word . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 20

2 Getting started with OneNote 2013 . . . . . . . . . . . . . . . . . . . . . . . . . . **21**

What's where in OneNote 2013 . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 22

Using the ribbon. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 23

Using the Quick Access Toolbar . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 25

Taking advantage of the notebook-section-pages hierarchy . . . . . . . . . . . . . . . 26

Creating a notebook . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 27

Renaming a notebook . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 29

Opening a notebook . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 30

Closing a notebook . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 33

Collapsing and expanding sections listed in the Notebooks pane. . . . . . . . . . .34
Navigating in OneNote . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .35
Converting OneNote 2007 notebooks to 2010-2013 and back again. . . . . . . .36

3

**Storing your notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 39**
Creating sections . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .40
Creating section groups . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .42
Creating pages . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .43
Creating and managing templates . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .45
Creating page groups . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .47
Expanding or collapsing pages in a group. . . . . . . . . . . . . . . . . . . . . . . . .48
Revisiting and restoring a different version of a page . . . . . . . . . . . . . . . . .49
Password-protecting a section. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .51
Removing a password from a section. . . . . . . . . . . . . . . . . . . . . . . . . . . . .53

4

**Writing basic notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 55**
Writing a note with the keyboard . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .56
Changing alignment and spacing in a note . . . . . . . . . . . . . . . . . . . . . . . .57
Moving notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .59
Deleting notes. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .60
Entering symbols and unusual characters . . . . . . . . . . . . . . . . . . . . . . . . .61
Selecting text. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .62
Copying and moving text . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 64
Formatting text. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .67

Applying styles to text . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .71
Creating numbered and bulleted lists . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .72

5 **Taking notes to another level . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 75**

Writing quick notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .76
Reading, moving, and deleting quick notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . .78
Handwriting notes and converting them to text . . . . . . . . . . . . . . . . . . . . . . . . .79
Creating and constructing outlines . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .81
Date-stamping and time-stamping notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .83
Attaching a file or copying a file's content to a note . . . . . . . . . . . . . . . . . . . . . 84
Sending files to OneNote . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .86
Inserting images from a scanner or digital camera . . . . . . . . . . . . . . . . . . . . . .87
Inserting a picture from your computer or network . . . . . . . . . . . . . . . . . . . . .89
Inserting a picture from an Internet source . . . . . . . . . . . . . . . . . . . . . . . . . . . .90
Taking a screen clipping . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .92
Constructing simple math equations . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .94
Constructing complex math equations . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .95
Recording audio and video notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .96
Playing back audio and video notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .97

6 **Putting a table in a note . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 99**

Creating a table . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 100
Inserting and deleting columns and rows . . . . . . . . . . . . . . . . . . . . . . . . . . . . .102
Selecting parts of a table . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 104
Sorting data in a table . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 105

Hiding or displaying table borders . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 106
Changing the width of columns . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 107
Aligning text in tables . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 108
Creating an Excel spreadsheet in a note . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 109
Converting a table into an Excel spreadsheet . . . . . . . . . . . . . . . . . . . . . . . . . 112

7

**Linking your notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 113**

Linking to other places in OneNote . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 114
Linking to another notebook . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 115
Linking to a place in the same notebook . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 117
Creating a link to a webpage . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 119
Creating a link to a file . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 120
Editing links . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 121
Taking linked notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 123
Viewing files or pages linked to notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 125

8

**Making OneNote easier to use . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 127**

Collapsing and expanding the Notebooks pane and page tabs . . . . . . . . . . . 128
Showing and collapsing the ribbon . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 131
Changing screen views . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 133
Docking OneNote to the desktop . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 134
Opening another OneNote window . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 135
Zooming in and out . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 136

9

**Using the spelling checker on your notes . . . . . . . . . . . . . . . . . . . . . 137**

Running the spelling checker . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 138
Customizing the spelling checker . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 140
Using the spelling checker with foreign-language text . . . . . . . . . . . . . . . . . .142
Autocorrecting common misspellings. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .143

10

**Drawing notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 145**

Drawing free-form with a pen or highlighter . . . . . . . . . . . . . . . . . . . . . . . . 146
Creating a custom pen or highlighter. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 148
Drawing lines, shapes, and graphs. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .149
Using the eraser . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 150
Panning to see your work . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .151
Selecting lines and shapes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .152
Moving lines and shapes. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 154
Resizing and deleting lines and shapes. . . . . . . . . . . . . . . . . . . . . . . . . . . . .155
Arranging overlapping lines, shapes, images, and containers . . . . . . . . . . . . .157
Rotating and flipping lines and shapes. . . . . . . . . . . . . . . . . . . . . . . . . . . . . 158

11

**Organizing your notes. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 159**

Moving or copying pages . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 160
Moving or copying a section to another notebook . . . . . . . . . . . . . . . . . . . . .162
Tagging notes and other items for follow-up . . . . . . . . . . . . . . . . . . . . . . . . 164
Customizing tags . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 166
Deleting tags. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 168

Finding tagged items . . . . . . . . . . 169
Color-coding notebooks, sections, and pages . . . . . . . . . . 170

12 **Searching for stray notes . . . . . . . . . . 173**

Searching for a note on a page . . . . . . . . . . 174
Searching a section, section group, or notebook . . . . . . . . . . 175
Searching for notes in all open notebooks . . . . . . . . . . 176
Refining searches with the Search Results pane . . . . . . . . . . 177
Choosing the default search scope . . . . . . . . . . 179

13 **Housecleaning in OneNote . . . . . . . . . . 181**

Deleting pages . . . . . . . . . . 182
Deleting a section . . . . . . . . . . 184
Restoring pages and sections from the Recycle Bin . . . . . . . . . . 185
Backing up notebooks on your own . . . . . . . . . . 188
Choosing how to back up notebooks . . . . . . . . . . 189
Opening a backup copy of a notebook section . . . . . . . . . . 190

14 **Conducting research in OneNote 2013 . . . . . . . . . . 193**

Understanding task panes . . . . . . . . . . 194
Researching a topic by using the Internet . . . . . . . . . . 196
Customizing the Research task pane . . . . . . . . . . 198
Translating a foreign word or phrase . . . . . . . . . . 200

Translating text by using the Mini Translator . . . . . . . . . . . . . . . . . . . . . . . . . . 201
Finding the right word by using the Thesaurus . . . . . . . . . . . . . . . . . . . . . . . . 203

15

**Distributing your notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 205**
Printing pages or an entire section . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 206
Sending a page by email . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 208
Exporting pages, sections, and notebooks in alternative file formats . . . . . . .210
Transferring a notebook to another computer . . . . . . . . . . . . . . . . . . . . . . . . 212

16

**Using OneNote with other Office 2013 applications . . . . . . . . . . . . . . 215**
Sending a page to Word . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .216
Copying Outlook items to OneNote . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .217
Choosing how Outlook copies items to OneNote . . . . . . . . . . . . . . . . . . . . . . .219
Creating an Outlook task in OneNote. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 221
Changing or deleting an Outlook task in OneNote . . . . . . . . . . . . . . . . . . . . . 223
Copying meeting details from Outlook to a note. . . . . . . . . . . . . . . . . . . . . . . .224

17

**Sharing notebooks with others . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 225**
Sharing a notebook . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 226
Synchronizing shared notebooks. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 229
Finding unread notes. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 230
Finding notes by specific authors . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .231
Finding recently edited notes. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .232

18 Customizing OneNote 2013 . . . . . . . . . . . . . . . . . . . . . . . . . . . . . **233**

Adding or removing Quick Access Toolbar buttons . . . . . . . . . . . . . . . . . . . . 234

Changing the order of buttons on the Quick Access Toolbar . . . . . . . . . . . . . 236

Repositioning the Quick Access Toolbar . . . . . . . . . . . . . . . . . . . . . . . . . . . .237

Resetting the Quick Access Toolbar . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 238

Customizing the ribbon . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .239

Creating or removing a ribbon tab . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 240

Creating or removing a ribbon group . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .242

Adding or removing commands from a ribbon group . . . . . . . . . . . . . . . . . 244

Renaming a ribbon tab or group . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 246

Moving a ribbon tab or group . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .247

Resetting your ribbon customizations . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 248

19 Using OneNote Web App . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . **249**

Getting ready to use OneNote Web App . . . . . . . . . . . . . . . . . . . . . . . . . . . 250

Creating SkyDrive folders for storing notebooks . . . . . . . . . . . . . . . . . . . . . .252

Creating a notebook on SkyDrive . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 254

Opening a SkyDrive notebook in OneNote . . . . . . . . . . . . . . . . . . . . . . . . . .256

Inviting others to share a notebook on SkyDrive . . . . . . . . . . . . . . . . . . . . . .257

Finding out who made changes to a SkyDrive notebook . . . . . . . . . . . . . . . .259

Creating a notebook in Office 365 . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 260

Index . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 263

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# About this book

# 1

*Microsoft OneNote 2013 Plain & Simple* is for users of Microsoft OneNote 2013 who want to make the most of the program and learn how to do tasks quickly. Don't look in this book to find out how OneNote 2013 works. Instead, look in this book to find out how *you* can get *your* work done faster and better by using OneNote.

You can use this book as a tutorial or a reference. Read it one section at a time to become an expert on OneNote or keep it by your computer to refer to it when you need help. This book was written and designed so that you can get the information you need and complete tasks right away.

**In this section:**

- No computerese!
- The path of least resistance
- A quick overview
- A few assumptions
- What's new in OneNote 2013
- Adapting task procedures for touchscreens
- A final word

## No computerese!

This book scrupulously avoids computerese, computerspeak, and nerd-talk. You will not scratch your head or grimace over computer jargon as you read this book.

For each task, you get a quick overview and the background information you need to proceed wisely. Then, you plunge right in. You get concise, step-by-step instructions for completing the task. And each set of instructions is accompanied by screenshots that show you precisely how to do the task and where to do it in OneNote.

Occasionally, you encounter a “See Also” element that refers you to a task similar to the one being described. You also find “Tips” that offer shortcuts and other useful advice. When you need to tread softly or carefully, you find a “Caution” element explaining why caution is the order of the day.

## The path of least resistance

More often than not, you can accomplish the same task in OneNote 2013 by using different methods. For example, you can create a table with the Insert Table dialog box or the Table drop-down menu.

Because there aren't enough pages in this book to cover all the ways to complete each task, I sometimes cover the easiest way only. In this book, if I can't be comprehensive and describe every technique, I choose the path of least resistance—the one that is easiest for you to follow.

## A quick overview

This book is your guide to getting the most from OneNote. It's jam-packed with how-to's, advice, shortcuts, and tips. Here is a bare outline of what you'll find:

Sections 2 and 3 get you up and running. They explain the basics of creating, opening, and navigating notebooks. They also show you how to create the sections, section groups, pages, and page groups you need to organize and store notes.

Section 4 explains the nitty-gritty of OneNote: how to write a note; format, move, and copy text; and create bulleted and numbered lists.

Section 5 describes advanced note-taking, including how to write outlines, insert pictures and screen clippings in notes, attach a file and file printout to a note, write math equations, and take audio and video notes. You also find out how to jot down a quick note and place it later on into a notebook.

Section 6 explains all you need to know about formatting and laying out tables, including how to create an Excel spreadsheet in a note and how to convert a OneNote table into an Excel spreadsheet.

Section 7 is all about linking. It explores how to create links between different notebooks, sections, and pages; how to hyperlink to webpages and files; and how to take linked notes.

Section 8 describes all the things that you can do to make working with OneNote easier, including how to minimize the ribbon, Notebooks pane, and page tabs; how to dock OneNote; and how to change screen views.

Section 9 takes on the spelling checker, including how to check the spelling of foreign text. Section 10 explains how to draw notes with lines, free-form lines, and shapes. Section 11 describes tagging and other ways to organize notes, such as moving and copying. Section 12 explores how to search for stray notes.

Section 13 explains housecleaning chores, including how to delete and restore sections and pages and how to back up a notebook. Section 14 shows how to use the Research pane to investigate topics and translate foreign-language text.

Section 15 looks at distributing notes by printing them as well as sending them by email, and how to save OneNote pages, sections, and notebooks in alternate file formats. Section 16 explores how to use OneNote and Microsoft Outlook 2013 to handle tasks, calendar events, meetings, and contact information.

Section 17 describes how to share notebooks and how to find and read notes written by your coauthors. Section 18 explains how to customize the ribbon and the Quick Access Toolbar to make yourself a more efficient user of OneNote.

Section 19 delves into OneNote Web App, the online version of OneNote, and how you can use it to collaborate with others when taking notes.

## A few assumptions

Pardon me, but I made a few assumptions about you, the reader of this book.

I assumed that you are experienced enough with computers to know the basics: how to turn the thing on and what "click" and "double-click" mean, for example. I assumed that Microsoft Office 2013 (OneNote is part of the Office 2013 suite) is already installed on your computer.

**CAUTION** This book also assumes that you are using OneNote 2013, which is part of Office 2013. There is another version of OneNote, OneNote App for Windows 8, which is available through the Windows Store. This version is optimized for touch-enabled devices, and it looks very different from the one described in this book. Although you can perform most of the tasks in this book by using OneNote App for Windows 8, the steps are slightly different. To learn more about OneNote App for Windows 8, see the book, *Microsoft Office Professional 2013 for Touch Devices,* by Katherine Murray.

# What's new in OneNote 2013

With each edition of OneNote, the makers of the application endeavor to improve it and add new features. OneNote 2013 is no different. Following is a rundown of new features in OneNote 2013.

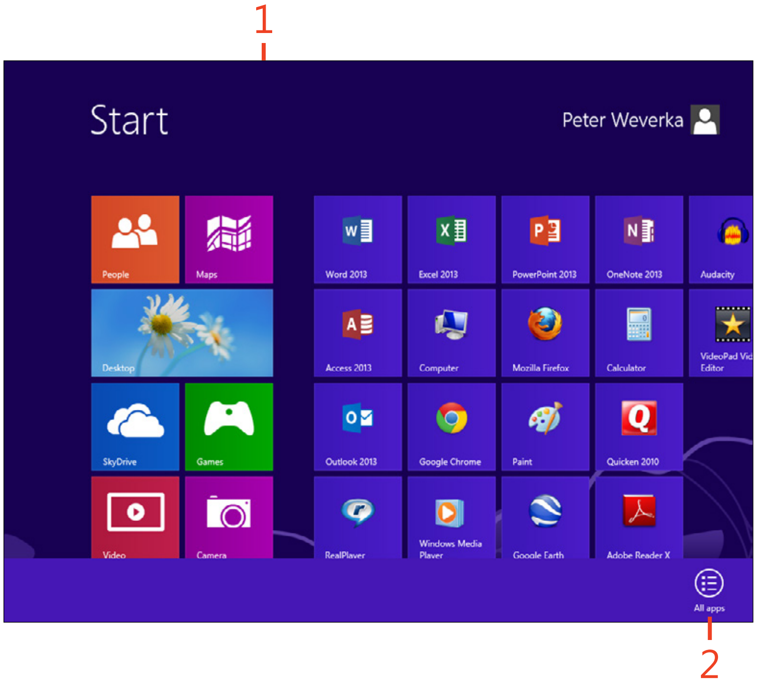
## Starting OneNote in Windows 8

If your computer runs Windows 8, the procedure for starting OneNote is probably new to you. To start OneNote, click the OneNote 2013 tile on the Apps screen. The application opens on the Windows desktop.

Follow these steps to start OneNote from the Apps screen:

1. Right-click the Start screen to display the Windows taskbar.
2. Click All Apps.

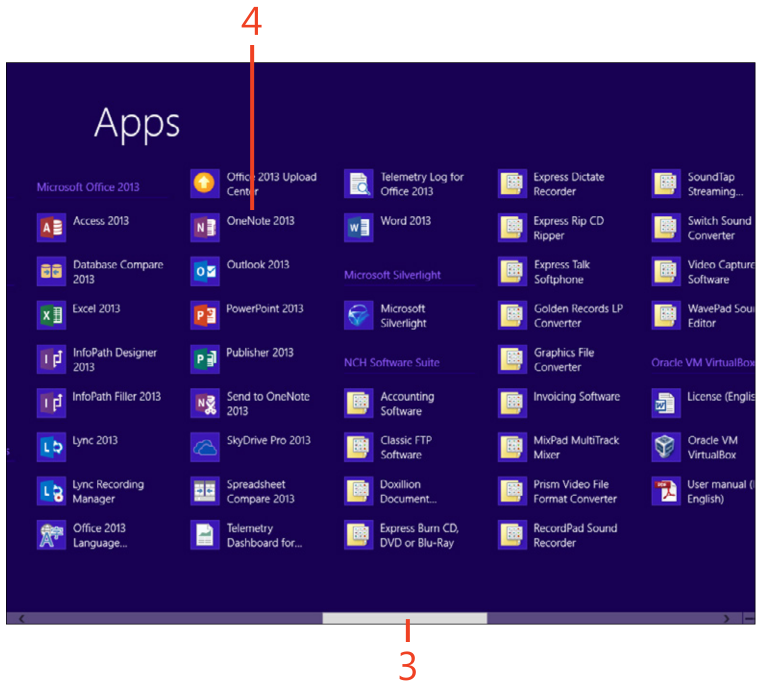
*(continued on next page)*


1
Start
Peter Weverka
People
Maps
Desktop
SkyDrive
Games
Video
Camera
Word 2013
Excel 2013
PowerPoint 2013
OneNote 2013
Audacity
Access 2013
Computer
Mozilla Firefox
Calculator
VideoPad Vid Editor
Outlook 2013
Google Chrome
Paint
Quicken 2010
RealPlayer
Windows Media Player
Google Earth
Adobe Reader X
All apps
2

## Starting OneNote in Windows 8 *(continued)*

3 Scroll to the right side of the Apps screen.

4 Click the OneNote 2013 tile.

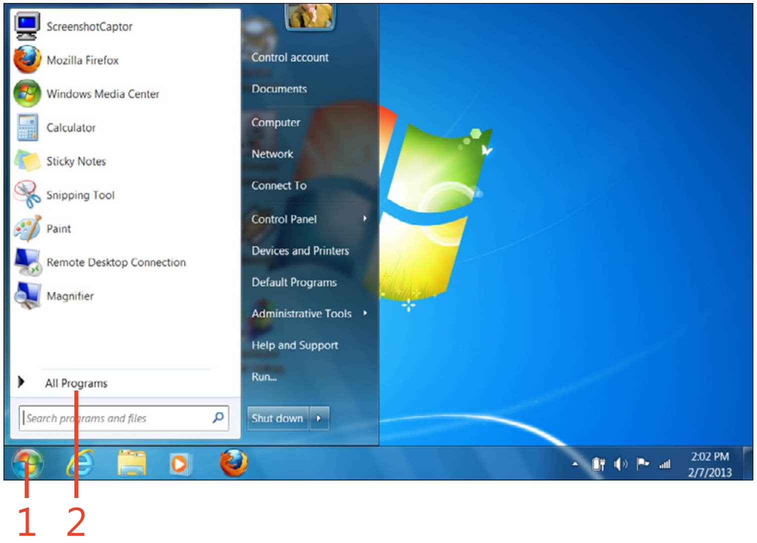

4
Apps
Microsoft Office 2013
Access 2013
Database Compare 2013
Excel 2013
InfoPath Designer 2013
InfoPath Filler 2013
Lync 2013
Lync Recording Manager
Office 2013 Language...
Office 2013 Upload Center
OneNote 2013
Outlook 2013
PowerPoint 2013
Publisher 2013
Send to OneNote 2013
SkyDrive Pro 2013
Spreadsheet Compare 2013
Telemetry Dashboard for...
Telemetry Log for Office 2013
Word 2013
Microsoft Silverlight
Microsoft Silverlight
NCH Software Suite
Accounting Software
Classic FTP Software
Doxillion Document...
Express Burn CD, DVD or Blu-Ray
Express Dictate Recorder
Express Rip CD Ripper
Express Talk Softphone
Golden Records LP Converter
Graphics File Converter
Invoicing Software
MixPad MultiTrack Mixer
Prism Video File Format Converter
RecordPad Sound Recorder
SoundTap Streaming...
Switch Sound Converter
Video Capture Software
WavePad Sou
Editor
Oracle VM VirtualBox
License (Englis
Oracle VM VirtualBox
User manual (
English)
3

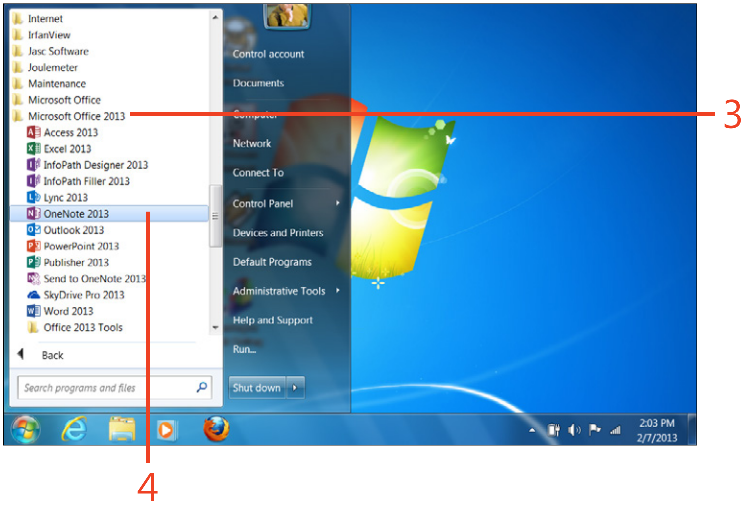
**CAUTION** You might have installed another version of OneNote from the Windows Store—OneNote App for Windows 8. If so, it appears in the Apps list as simply OneNote. The version of OneNote described in this book appears grouped together with the other Microsoft Office 2013 apps tiles, with the name OneNote 2013. Make sure you click the OneNote 2013 tile to start the program.

## Starting OneNote in Windows 7

If your computer runs Windows 7, follow these steps to start OneNote:

1. Click the Start button.
2. Click All Programs.
3. Click Microsoft Office 2013.
4. Click OneNote 2013.


ScreenshotCaptor
Mozilla Firefox
Windows Media Center
Calculator
Sticky Notes
Snipping Tool
Paint
Remote Desktop Connection
Magnifier
All Programs
Search programs and files
Control account
Documents
Computer
Network
Connect To
Control Panel
Devices and Printers
Default Programs
Administrative Tools
Help and Support
Run...
Shut down
2:02 PM
2/7/2013
1
2


Internet
IrfanView
Jasc Software
Joulemeter
Maintenance
Microsoft Office
Microsoft Office 2013
Access 2013
Excel 2013
InfoPath Designer 2013
InfoPath Filler 2013
Lync 2013
OneNote 2013
Outlook 2013
PowerPoint 2013
Publisher 2013
Send to OneNote 2013
SkyDrive Pro 2013
Word 2013
Office 2013 Tools
Back
Search programs and files
Control account
Documents
Network
Connect To
Control Panel
Devices and Printers
Default Programs
Administrative Tools
Help and Support
Run...
Shut down
2:03 PM
2/7/2013
3
4

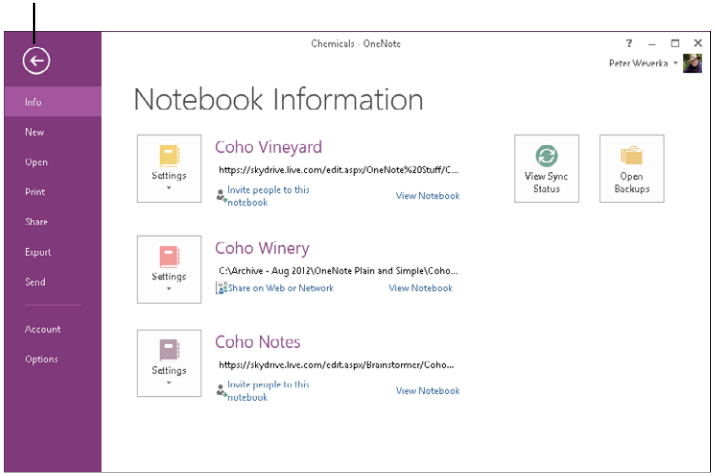
## Navigating the Backstage view

To visit the Backstage view, on the ribbon, click the File tab. The Backstage view offers commands for creating, opening, printing, sharing, exporting, and sending OneNote notebooks. Click a tab on the left side of the Backstage view window and you see options on the right for performing different tasks. For example, click Info and you see information about the currently open notebook.

What is different about the Backstage view in OneNote 2013 is this: it now offers a convenient Back button. You can click this button to return to the OneNote screen.

Clicking the Options tab opens the OneNote Options dialog box, in which you choose settings to make OneNote work your way.

Click the Back button to return to the OneNote screen

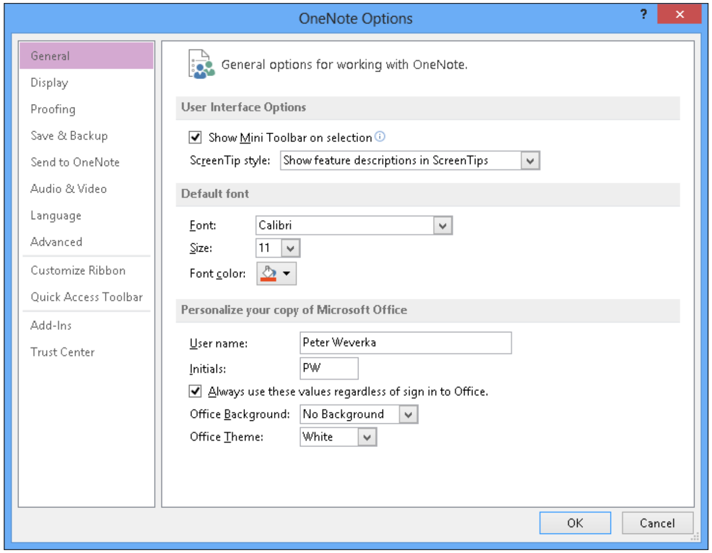

Chemicals - OneNote
? – □ ✕
Peter Weverka
Info
New
Open
Print
Share
Export
Send
Account
Options
Settings
View Sync Status
Open Backups
Invite people to this notebook
Share on Web or Network
View Notebook

Notebook Information

Coho Vineyard
https://skydrive.live.com/edit.aspx/OneNote%20Stuff/C...

Coho Winery
C:\Archive - Aug 2012\OneNote Plain and Simple\Coho...

Coho Notes
https://skydrive.live.com/edit.aspx/Brainstormer/Coho...


OneNote Options
? ✕
General
Display
Proofing
Save & Backup
Send to OneNote
Audio & Video
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
OK
Cancel

General options for working with OneNote.

User Interface Options

☑ Show Mini Toolbar on selection

ScreenTip style: Show feature descriptions in ScreenTips

Default font

Font: Calibri

Size: 11

Font color:

Personalize your copy of Microsoft Office

User name: Peter Weverka

Initials: PW

☑ Always use these values regardless of sign in to Office.

Office Background: No Background

Office Theme: White

## Sharing notebooks

OneNote 2013 is optimized for sharing notebooks through SkyDrive. SkyDrive is an online cloud service from Microsoft for storing and sharing files. To use SkyDrive, you must sign up for a Microsoft Account. After signing up, you can store OneNote notebooks on SkyDrive so that you can access them from anywhere—through OneNote, OneNote Mobile, or a web browser (using OneNote Web App). You can also share notebooks stored on SkyDrive with your friends and colleagues when you need to work collaboratively.

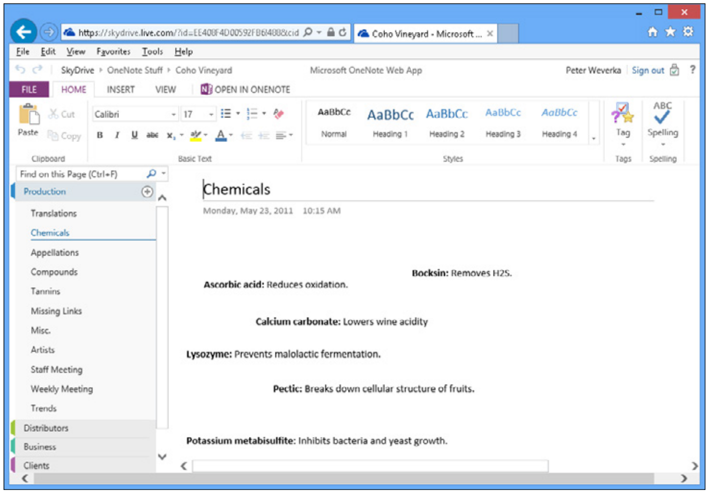
You can also share notebooks through a SharePoint site, a company network, or Microsoft Office 365 (which provides a SharePoint site or SkyDrive for file collaboration). SharePoint is used by companies to share files. It provides a structured method for collaboration through blogs, wikis, and company news updates. To share notebooks through SharePoint, save the notebook to a folder on the SharePoint site. To share notebooks through a company network, save the notebook in a shared folder.

Office 365 is a subscription service that provides online storage of notebooks and other services. Depending on your subscription level, you can share notebooks through SkyDrive or through a SharePoint team site designed for collaboration.

**SEE ALSO** To learn how to share notebooks through SkyDrive or SharePoint, read "Sharing a notebook" on page 226.

**SEE ALSO** To learn how to create and share notebooks on Office 365, read "Creating a notebook in Office 365" on page 260.

**TIP** You can sign up for a Microsoft Account at *https://signup.live.com*. After creating an account, you can log on to SkyDrive and access your files and OneNote Web App at *www.skydrive.com*.


https://skydrive.live.com/?id=EE408F4D00592FB6!488&cid
Coho Vineyard - Microsoft ...
File Edit View Favorites Tools Help
SkyDrive ▸ OneNote Stuff ▸ Coho Vineyard
Microsoft OneNote Web App
Peter Weverka Sign out
FILE HOME INSERT VIEW OPEN IN ONENOTE
Paste Cut Copy Clipboard
Calibri 17 Basic Text
AaBbCc Normal AaBbCc Heading 1 AaBbCc Heading 2 AaBbCc Heading 3 AaBbCc Heading 4 Styles
Tag Tags
ABC Spelling Spelling
Find on this Page (Ctrl+F)
Production
Translations
Chemicals
Appellations
Compounds
Tannins
Missing Links
Misc.
Artists
Staff Meeting
Weekly Meeting
Trends
Distributors
Business
Clients

Chemicals

Monday, May 23, 2011 10:15 AM

**Bocksin:** Removes H2S.

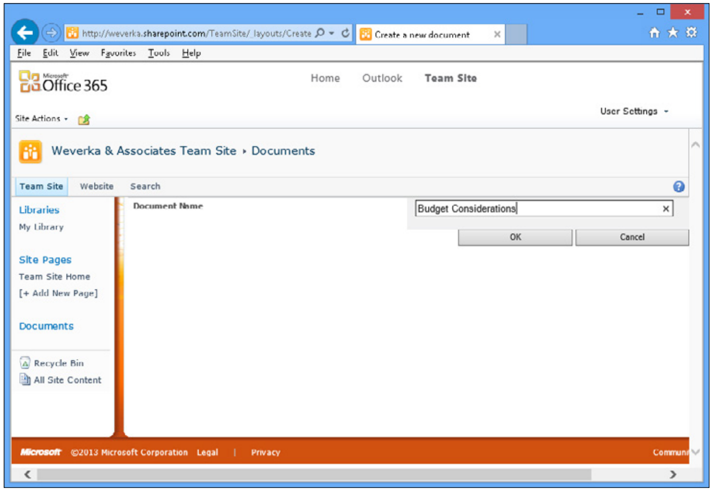
**Ascorbic acid:** Reduces oxidation.

**Calcium carbonate:** Lowers wine acidity

**Lysozyme:** Prevents malolactic fermentation.

**Pectic:** Breaks down cellular structure of fruits.

**Potassium metabisulfite:** Inhibits bacteria and yeast growth.

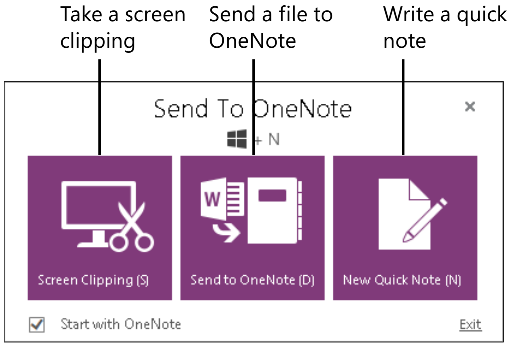

http://weverka.sharepoint.com/TeamSite/_layouts/Create
Create a new document
File Edit View Favorites Tools Help
Microsoft Office 365
Home Outlook Team Site
Site Actions
User Settings
Weverka & Associates Team Site ▸ Documents
Team Site Website Search
Libraries
My Library
Site Pages
Team Site Home
[+ Add New Page]
Documents
Recycle Bin
All Site Content
OK Cancel
Microsoft ©2013 Microsoft Corporation Legal | Privacy
Communi

Document Name: Budget Considerations

## Using the Send To OneNote tool

The Send To OneNote tool opens in its own window when you start OneNote. It offers a convenient way to access three OneNote commands:

- **Screen Clipping** Click Screen Clipping in the window to capture part of an open window on your computer screen as a screenshot. (You can also take a screen clipping on the Insert tab by clicking the Screen Clipping button.)
- **Send To OneNote** Click Send To OneNote to copy a Microsoft Word document, Microsoft Excel spreadsheet, or Microsoft PowerPoint presentation to a page in a notebook. Before clicking Send To OneNote, open the document, spreadsheet, or presentation.
- **New Quick Note** Click New Quick Note in the window to write a quick note—a note that you can move later to a page. Quick Notes are stored temporarily in the Quick Notes folder until you move them elsewhere.



**TIP** If you prefer the Send To OneNote Tool *not* to appear when you start OneNote, clear the Start With OneNote check box located at the bottom of the Send To OneNote window.

**TIP** You can also open the Send To OneNote window by clicking the Send To OneNote Tool icon in the notification area.

**SEE ALSO** To learn all the details of taking screen clippings, read "Taking a screen clipping" on page 92.

**SEE ALSO** To learn the details of sending files to OneNote with the Send To OneNote command, read "Sending files to OneNote" on page 86.

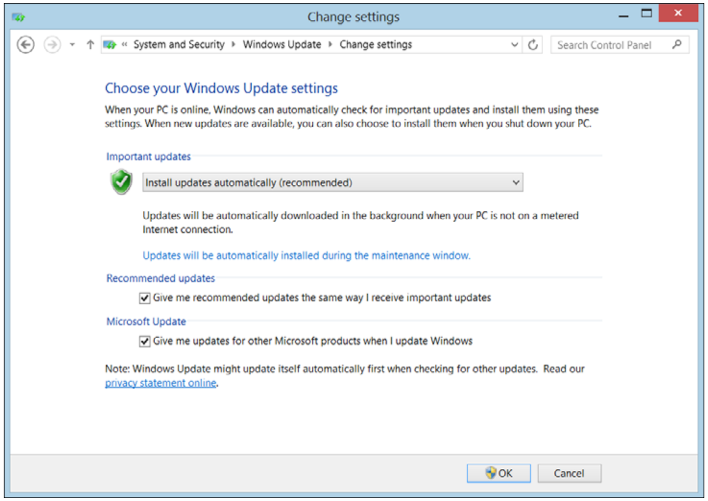
**SEE ALSO** To learn all the details of writing quick notes, read "Writing quick notes" on page 76.

## Updating your Office account

Office is available in two basic versions: Office 2013 and Office 365. Office 2013 is standard “boxed” software. It comes in different editions—Office Home and Student or Office Home and Business—that might or might not include Microsoft Outlook, Microsoft Publisher, and Microsoft Access.

Office 365, on the other hand, is a subscription service that provides various services (depending on your subscription level), such as cloud storage, email, shared calendars, instant messaging, online editing of Office documents (using Office Web App and/or streaming versions of the full programs—Office on Demand), public website, and a team site for document collaboration.

If you subscribe to Office 365 Home Premium or an Office 365 service that supplies Office, OneNote and your other Office programs are updated automatically during your subscription period.



Choose your Windows Update settings

When your PC is online, Windows can automatically check for important updates and install them using these settings. When new updates are available, you can also choose to install them when you shut down your PC.

Important updates

Install updates automatically (recommended)

Updates will be automatically downloaded in the background when your PC is not on a metered Internet connection.

Updates will be automatically installed during the maintenance window.

Recommended updates

☑ Give me recommended updates the same way I receive important updates

Microsoft Update

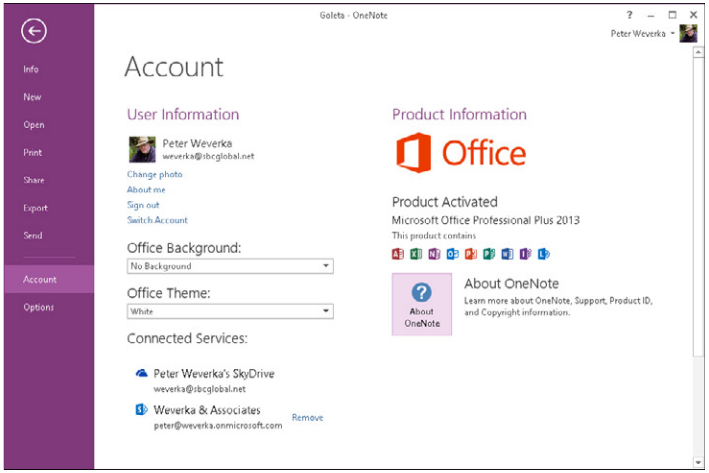
☑ Give me updates for other Microsoft products when I update Windows

Note: Windows Update might update itself automatically first when checking for other updates. Read our privacy statement online.

If you purchase Office 2013 as a classic software package, without the subscription and without the services, you will receive updates during the entire product cycle (approximately two years or so), as well. These updates will also install automatically, provided you’ve instructed Windows to do that. Display the Windows desktop by clicking the Desktop tile on the Start screen. Move the mouse pointer to the lower-right corner of the screen and click the Settings charm. Click Control Panel, click Systems And Security, click Windows Update, and then click Change Settings. In the Change Settings dialog box that opens, select the Give Me Updates For Other Microsoft Products When I Update Windows check box and click OK.

In the Account window in OneNote, you can view the list of services to which you are connected—SkyDrive, Office 365 SharePoint site, and others. To open the Account window, click File to display the Backstage view and then click the Account tab.

By clicking the About OneNote button in the Account window, you can open a dialog box that displays your Product ID number.



Account

User Information

Peter Weverka
weverka@sbcglobal.net

Office Background: No Background

Office Theme: White

Connected Services:

Peter Weverka's SkyDrive
weverka@sbcglobal.net

Weverka & Associates
peter@weverka.onmicrosoft.com

Product Information

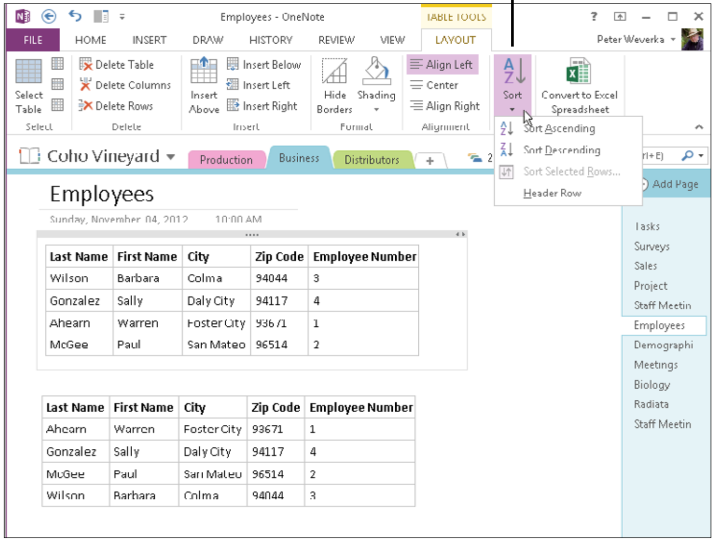
Product Activated
Microsoft Office Professional Plus 2013
This product contains

About OneNote
Learn more about OneNote, Support, Product ID, and Copyright information.

## Sorting table data

Sorting means to rearrange the information in a list or table in alphabetical or numerical order. In a table of names, for example, sorting the list in alphabetical order from A to Z makes finding a name easier. In a table of numbers, sorting the table in numerical order makes comparing the numbers easier.

With the Sort command, you can sort a table in ascending or descending order and make your table easier to understand.



Click the Sort button to sort table data

Employees - OneNote
TABLE TOOLS
FILE
HOME
INSERT
DRAW
HISTORY
REVIEW
VIEW
LAYOUT
Peter Weverka
Select Table
Select
Delete Table
Delete Columns
Delete Rows
Delete
Insert Above
Insert Below
Insert Left
Insert Right
Insert
Hide Borders
Shading
Format
Align Left
Center
Align Right
Alignment
Sort
Convert to Excel Spreadsheet
Sort Ascending
Sort Descending
Sort Selected Rows...
Header Row
Coho Vineyard
Production
Business
Distributors
Add Page
Tasks
Surveys
Sales
Project
Staff Meetin
Employees
Demographi
Meetings
Biology
Radiata
Staff Meetin

Employees

Sunday, November 04, 2012 10:00 AM

| Last Name | First Name | City | Zip Code | Employee Number |
|---|---|---|---|---|
| Wilson | Barbara | Colma | 94044 | 3 |
| Gonzalez | Sally | Daly City | 94117 | 4 |
| Ahearn | Warren | Foster City | 93671 | 1 |
| McGee | Paul | San Mateo | 96514 | 2 |

| Last Name | First Name | City | Zip Code | Employee Number |
|---|---|---|---|---|
| Ahearn | Warren | Foster City | 93671 | 1 |
| Gonzalez | Sally | Daly City | 94117 | 4 |
| McGee | Paul | San Mateo | 96514 | 2 |
| Wilson | Barbara | Colma | 94044 | 3 |

**SEE ALSO** To learn the ins and outs of sorting information in a table, read “Sorting data in a table” on page 105.