

Microsoft® Office

OneNote 2013

Certification Guide



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OneNote 2013

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Lesson 1: Getting Started

Lesson Objectives

In this lesson, you will look at how to configure or personalize OneNote, including the working environment, pages, and notebooks. You will also look at how to create and save a notebook in various locations. On successful completion of this lesson, you will be comfortable with:

- ☐ identifying screen elements
 - ☐ customizing the working environment
 - ☐ customizing the page setup
 - ☐ setting properties
 - ☐ creating a new OneNote notebook
 - ☐ recognizing various page layout options
 - ☐ using containers
 - ☐ working with simple lists
 - ☐ opening or closing notebooks
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Introducing OneNote

Microsoft OneNote is an application within the Microsoft Office 2013 suite of programs that enables you to gather information in the form of notes from a variety of sources in an undefined manner, and then organize these into pages or sections. This is similar to gathering pages of hard copy notes and diagrams and adding them to a binder, using dividers to separate the information.

In OneNote, the notes can be handwritten or typed, and can contain pictures or drawings as well as audio or media files. You can then share this information with others and collaborate on a project using the OneNote notebook to store everyone's contributions.

The difference between using OneNote and a program such as Word to capture your notes is that the information you gather for OneNote usually is not structured for publication in the same manner as a Word document. You may eventually turn your notes from the OneNote notebook into a published document, but at the time you are working in OneNote, it is simply a central location to deposit related information on a topic.

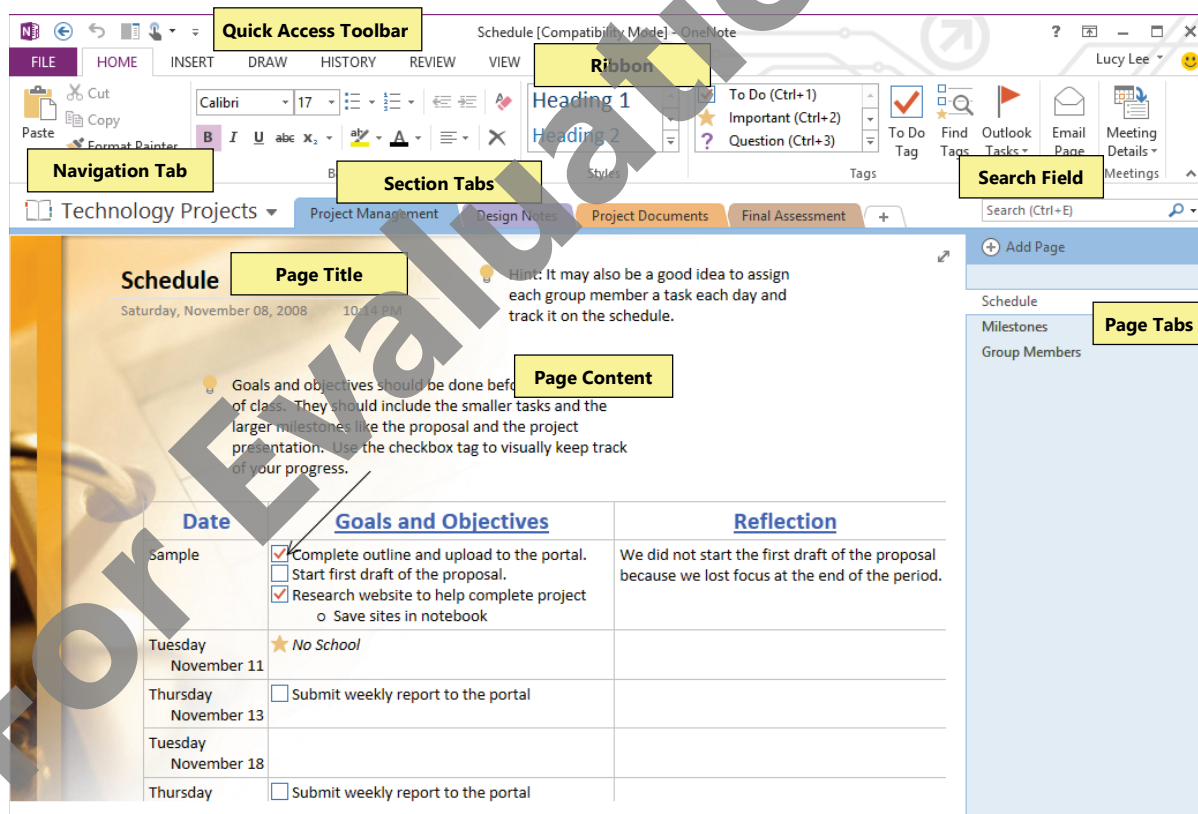
Common uses for OneNote include:

- a journal to keep notes on a trip (including items such as photos, contacts, itinerary)
- a schedule of things to do, which link to additional pages where you can get information on these tasks (such as church, reception rentals, florists, pictures of favorite wedding dresses along with local wedding dress retailers, or contact information for printers)
- a research project (such as Web sites with historical information, contact information such as libraries or people, or contributions from other people involved in the research project)
- a place to keep notes from meetings, lectures, studying, or exam preparation.

As you begin using OneNote, you will find there are many ways you can use it to help you keep organized, or to simply gather information for a particular task.

Looking at the Screen

An example of a typical OneNote page is shown:



File Tab

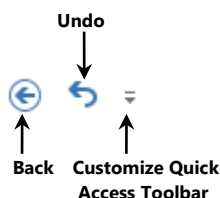
Click to display Backstage view, from which you can select commands for a file (for example, New, Open, Save). A panel at the left displays commands that may include tabs with a set of sub-commands you can use to manage the file.

Quick Access Toolbar	Gain quick access to frequently used commands. You can customize the toolbar, which is located above the ribbon, to contain commands you use regularly.
Title Bar	View the name of the page currently displayed on the screen (for example, Untitled page – Microsoft OneNote, University Courses – Microsoft OneNote) on the title bar, located at the top of the screen.
Ribbon Display Options	Minimize the ribbon to display more of the notebook contents, display only the ribbon Tabs, or display the full ribbon.
Help	Display the Help window to obtain the latest help on a feature; Microsoft's Help option links to the Microsoft web site for the latest information. You can also use the help topics installed with Office.
Ribbon	Gain quick access to commands through this collection of tabs (for example, File, Home, Insert, Share).
Ribbon Tab	Gain access to commands grouped on tabs for specific purposes, such as editing, inserting objects, viewing options, or page layout.
Ribbon Group	Gain access from within tabs, each of which contains a group of related commands for editing, formatting, or enhancing items in your notebook.
Navigation Tab/Pane	View available notebooks on the panel or tab at the left side of the screen. The preceding screen capture shows the Navigation pane collapsed as a tab for the current notebook; when expanded, the bar displays other open notebooks as well as an option to create Quick Notes . Use the tab to expand or collapse the pane.
Section Tabs	Display the name of each section in colored tabs to indicate the different content for that page; the preceding screen capture shows <i>Project Management</i> , <i>Design Notes</i> , and so on as an example, but you can rename these tabs to match your content. Use the  tab to create a new section tab.
Search Field	Use this field to search for content on individual pages, in sections, or in notebooks.
Page Tabs	Create new pages or subpages. The preceding screen capture shows the Page Tabs bar expanded and displaying pages called <i>Schedule</i> , <i>Milestones</i> , and so on. Use the  or  button to add more pages.
Page Title	The name or title of the page; whenever you create a new page, the text entered here becomes the name of the page. You can also rename or hide the title, as needed.
Page Content	Display all your notes, pictures, and links in this area. Enter the Page Title in the box at the top of the page; it then automatically appears in the Page Tabs area to the right.
Quick Notes	Click this at the bottom of the Navigation Tab to create notes that may not be related to the notebook you are currently using. For instance, you may be taking notes at a lecture and suddenly remember the Web address that a contact gave you earlier in the day for another project you are researching. Use this button to create a new page where you can enter the information quickly, and then later, file with its appropriate notebook.

The previous screen displays commonly used areas of the OneNote screen. However, as you can customize the screen's appearance, additional items may appear on your screen that are not discussed here. We will look at how to change or reset preferences for the working environment or notebook shortly.

Using the Quick Access Toolbar

The Quick Access Toolbar, at the left of the title bar above the ribbon, includes buttons for frequently used commands. By default, this toolbar contains the following icons:



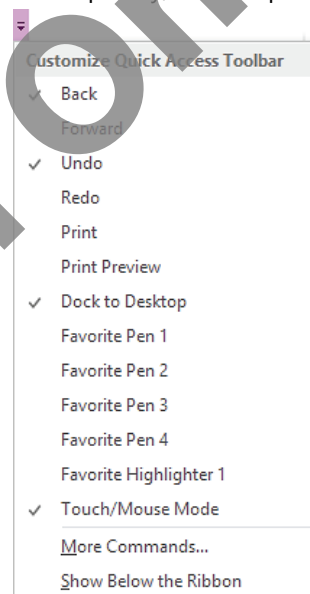
Use the last button to customize the toolbar to display those commands you use frequently, such as print preview, forward, or a favorite pen.

To customize the Quick Access Toolbar, use one of the following methods:

- Click **Customize Quick Access Toolbar**, and then click a button from the displayed list or click **More Commands**; or
- click **File**, click **Options**, and then click **Quick Access Toolbar**; or
- right-click anywhere on the ribbon, click **Customize Quick Access Toolbar**, and click a button from the list or click **More Commands**.

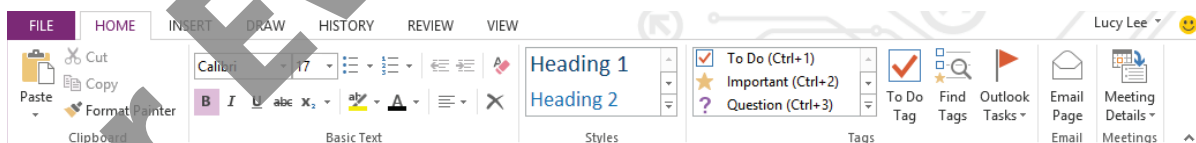
To move the Quick Access Toolbar to below the ribbon:

- Click **Customize Quick Access Toolbar** and then click **Show Below the Ribbon**; or
- right-click the ribbon and then click **Show Quick Access Toolbar Below the Ribbon**.

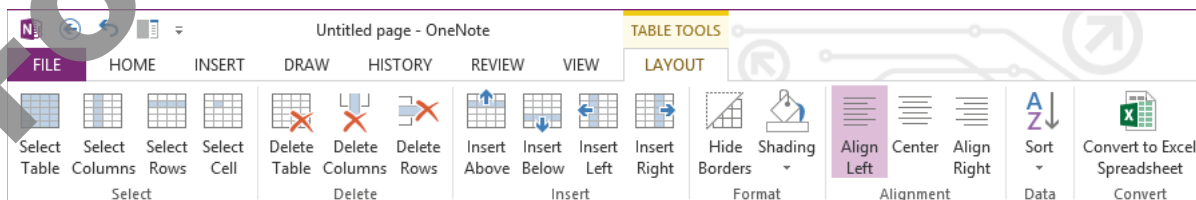


Using the Ribbon

The ribbon can help you find commands quickly. Commands are grouped on tabs with each tab relating to a type of activity, such as inserting items, changing the view, or formatting text. You can customize the ribbon to display commands you use frequently in a particular order, or to add or remove commands for a ribbon tab.

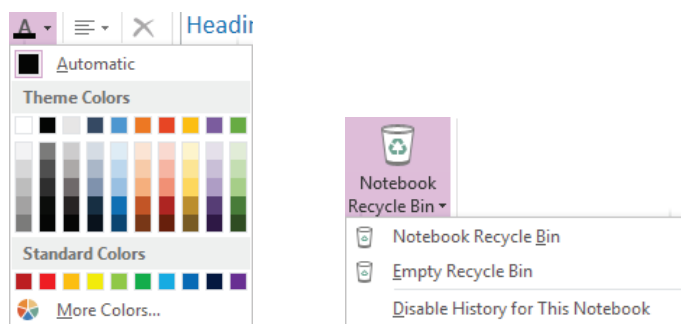


To reduce screen clutter, contextual tabs, such as Table Tools, appear only when they are applicable.



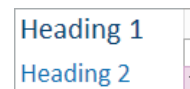
A button that appears in a different color or has an outline is active; many of these de-activate when you click the same button again or click another choice. For instance, you can apply the **Bold** command to selected text by clicking that button and then turn off the boldface by clicking the same button again.

When the feature displays an arrow, as with the Font or Size feature, the active item appears in the list and you can click the arrow to display the full list for selection. In most cases, you will be able to change the selection for the feature by clicking the same arrow and then clicking another item from the list. For instance, if you want the text to be a different size, click the arrow for the **Size** button and choose the required size. When you need to change the font size again, click the arrow for **Size** and then select the new size.

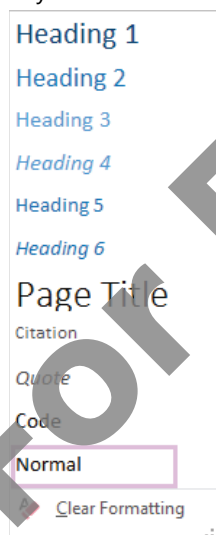


Each tab on the ribbon contains groups with similar commands; for example, the Home tab includes a group called Basic Text that contains buttons for formatting text characters while the Insert tab includes a groups with different types of items that can be inserted into a note page.

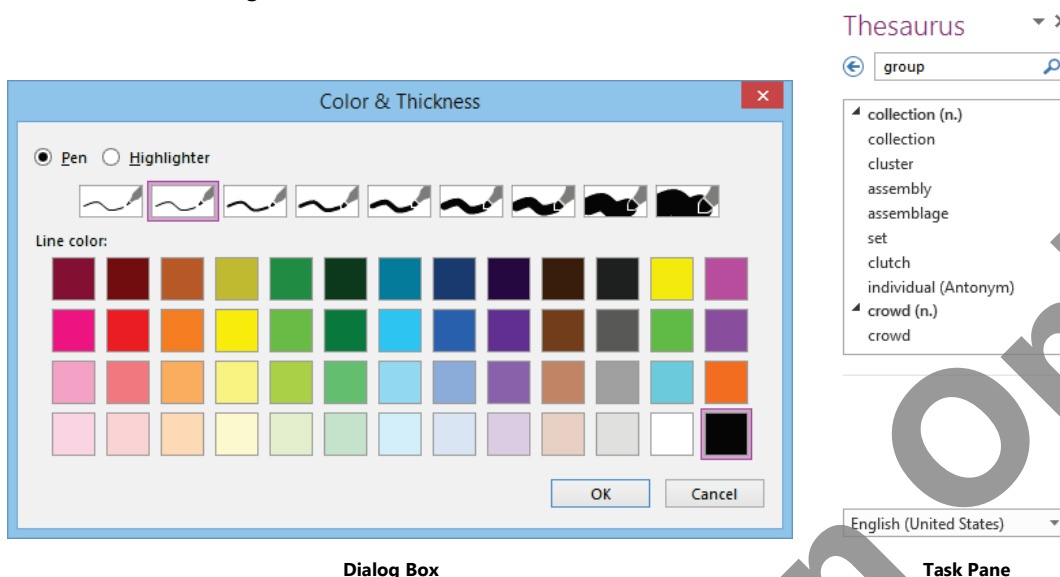
If a group of commands is accompanied by a scroll bar, you can click on a button below the bottom scroll button, called the **More** button, to display the full list of options for that command. This is shown in this illustration.



When clicked, the **More** button displays a gallery with additional options, as shown in the illustration to the right. The currently selected option (in this illustration, *Normal*) is highlighted with a box around it; to apply any other selection, simply click it.



Occasionally when you select a feature, it will open a dialog box or a task pane offering further selections, as shown in the following illustrations.



Dialog Box

Task Pane

With a dialog box, you can type in an entry (such as a measurement), select an item from a list, use the arrow with a list box to display more choices for that list, or click a command to turn the feature on or off. A dialog box may also display a preview of the changes to guide your choices.

A task pane, on the other hand, usually offers options specific to a feature. This is shown in the preceding graphic, which includes fields you can use to find specific research information. Another task pane is the Customize Numbering pane, which displays a list of formats you can use to number your text list.

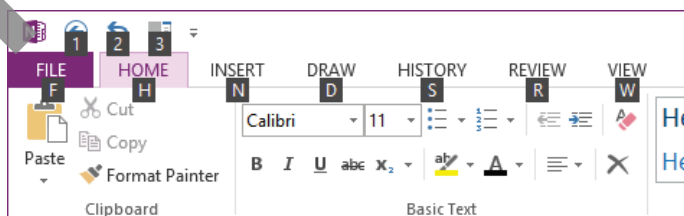
You can collapse the ribbon if you want to show more of your document or you do not want to display the ribbon. To collapse the ribbon:

- Click the  button at the far right of the top of the ribbon; or
- double-click any of the ribbon tabs; or
- right-click anywhere on the ribbon and then click **Collapse the Ribbon**; or
- press **Ctrl+F1**.

To display the ribbon again, use the  button or any of the previous methods.

You can also access the ribbon using the keyboard; some users consider the keyboard a faster method for accessing commands. Many keyboard shortcuts, such as **Ctrl+C** to copy, **Ctrl+S** to save, and **Ctrl+P** to print, are the same throughout Windows programs, making it easy to remember what to do from one program to another.

To access the ribbon using the keyboard, press **Alt** or **F10**; this will display the keyboard buttons for the commands in the ribbon.



When you press the key for the appropriate feature, OneNote displays the next set of keys you can use to select a command or feature. For example, pressing **(H)** displays the **Home** tab.



You can then press the appropriate key to access that feature.

You can also use the keyboard to:

- Access another tab; with the ribbon active, press **(←)** or **(→)** to move to the appropriate tab.
- Change the highlight or focus from the active tab to the search field; simply press **(F6)**.
- Display a shortcut menu for the selected command; press **(Shift)+(F10)**.
- To move from the tab to the command in the first group; press **(Tab)**. Continue pressing **(Tab)** to move to the next command, or **(Shift)+(Tab)** to move to the previous command. (You can only do this if you've pressed **(Alt)** or **(F10)** to display the keyboard shortcuts on the ribbon.)
- Activate the selected command; press **(Enter)**.
- Exit or cancel a selection at any time; press **(Esc)**. (You may need to press **(Esc)** more than once to return to your page.)

Managing OneNote Notebooks

Files created for OneNote are considered notebooks, similar to traditional paper notebooks that you may have used to keep track of notes, ideas, pictures, and so on. Notebooks can consist of:

- individual pages
- sections that may contain pages and subpages
- section groups that may contain sections, pages, and subpages.

You can view and work on only one notebook at a time; you cannot have multiple sessions of OneNote open as you can with other Office programs.

You will use Backstage whenever you need to manage your notebooks. It is in this area where you will configure how and where the notebooks are saved, as well as default options you want all notebooks to share such as the font, rule lines, or view.

Personalizing OneNote

Objective 1.4

When you start OneNote the screen appears with default settings for the working environment which you can change to suit your preferences. These can be found by clicking the **File** tab and then clicking **Options**.