Crabby demystifies OneNote terms

Applies to: Microsoft Office Access 2007, OneNote 2007, Access 2003, OneNote 2003

Print

The Crabby Office Lady

I think the best way to learn something is to jump headlong into it and give it a try. It won't bite, and no one will know if you make mistakes (unless you're posting everything to a server, of course). But again, it's good to know some of the basics. You had to learn to blow bubbles before you could learn to swim, right?

Crabby Office Lady columns

Crabby's blog
Crabby's podcasts

When you are embarking upon a new endeavor, be it parenthood, cooking classes, or a new career, if you don't understand the argot that goes along with it, chances are you'll be lost before you even begin. What's a "vaccination schedule"? What's a "roux"? What does "overtime" mean?

See what I mean? It's a good idea to learn some of the basics before you jump into all that baby-making and buying of all those fancy pots and pans.

Ready, set … define those terms!

This week I'm covering some of the very basics of Microsoft Office OneNote 2007, our very popular note-taking and information management program. Note that there are some differences between OneNote 2003 and Office OneNote 2007, so there is your incentive — and my shameless plug — for upgrading.

Notebooks, sections, and pages

A OneNote notebook is just like a regular spiral notebook: It's where you pile all your, um, notes. But unlike a regular paper notebook, you can add, move, and delete anything you want. It's very forgiving (no ripped pages, no scratched-out phone numbers of old girlfriends), and you can organize and separate your notes by sections and pages. And if you're like me, you need many notebooks — not just one.

NOTE In OneNote 2007, you can create many notebooks, whereas in OneNote 2003, you have one.

For example, you can keep one notebook that has all your notes regarding a certain project at work, a separate notebook for team meetings, and one that is for your personal life. The notebook in OneNote is the starting point when you set off on your journey to get organized … and stay that way.

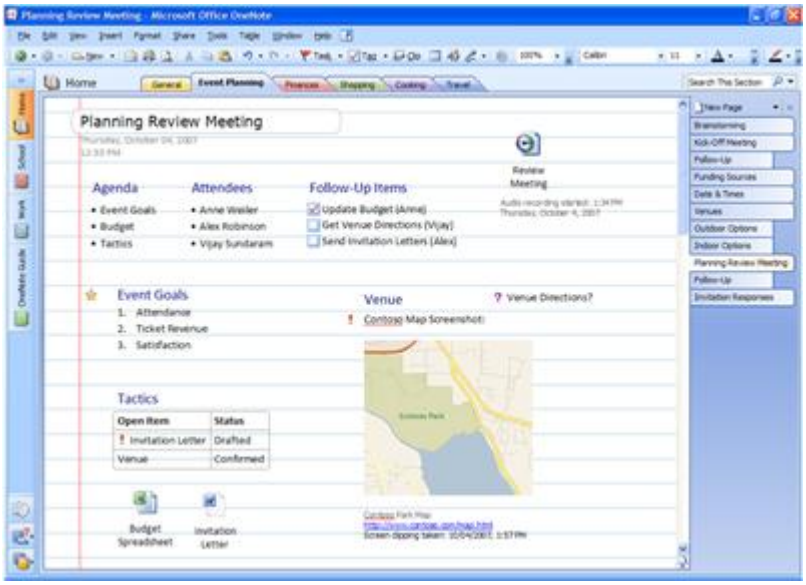
For example, I keep track of all my Crabby Office Lady work in OneNote. I have one notebook called "Columns," one called "PR," and another called "Other projects" (yes it's true — I do play more than one note here at Microsoft). But if I were using a regular paper notebook, I would have trouble separating all the different facets of the work I do. I mean, there would be colored tabs and sticky notes and oddly placed flags spilling out over the sides of my notebook. It would be a complete mess. That's where sections and pages come in.

- Each notebook can contain several **sections**. My "Columns" notebook contains these sections: Columns about e-mail; seasonal columns; columns meant to vex and generally irritate my readers (just kidding; I don't do that on purpose).

  This "Columns" notebook also has a **section group**, a group of sections filled with ideas that all relate to each other … but still belonging in a specific notebook, not in a notebook on their own.
- Within each of my sections, I have **pages**. For example, in my columns about e-mail, I have my notes on one page about the first column I did about e-mail etiquette; another page for a column I wrote about e-mail protocols; and on another page, I have the notes I jotted down when I wrote about demystifying e-mail terms.

Underneath that demystifying e-mail terms page, I created a **subpage** that contained all the other e-mail terms that I forgot to cover (and which you so blithely reminded me of in feedback) and was right there for me to grab when I wrote my demystifying *more* e-mail terms column. I can title the pages (or subpages), date them, group them, ungroup them, and even move them around. There is virtually no end to how I can arrange my pages within the sections within the notebooks of my little OneNote. I'm quite fond of this program — can you tell?

You must be getting the picture by now. No? Well, here is an example of a OneNote notebook. On the left side are the notebooks, the top tabs are sections, and on the right are the pages and subpages of the selected section.



View a larger image

Now that you know the parts of OneNote, let's get to the goodies.

Note containers

When you start typing (or writing, if you're using a Tablet PC), a note container is automatically created for you. It's a flexible box that you can resize, move, and even hide. Note containers appear when you move your pointer over them or when you click on a page and begin typing.

1 Move handle
2 Sizing handle

Of course, if these containers offend you, you can turn them off. However, whatever you've written or added to them (pictures, video clips, screen clippings) is not hidden — only the containers themselves. Myself, I like having the note containers showing. They give me a sense of belonging, of containment, of space.

Screen clippings

You can use OneNote 2007 to take a picture of all or part of your computer screen, and then insert it into your notes. These pictures are called screen clippings, and you don't need to edit them with some other sort of software.

For example, if you're busily working away and you find yourself coming to a screeching halt because the Web site you're looking at has so many misspellings, perhaps you want to later point that out to the person responsible. But right now you're on deadline and you cannot stop to pick them all out. So what do you do? You take a snapshot of the egregious page, and insert it into OneNote. But wait! There's more! You can easily paste additional copies of the image onto other pages in your OneNote notebook or into another program. Screen clippings are the best way I know to take snapshots of anything you see on your computer, whether it's on the Web, in a document, or even in a separate part of your notebook.

Note tags

A note tag in OneNote 2007 (called note *flags* in OneNote 2003) is a way to remind yourself that you need to revisit something you've jotted down. Maybe you need to remind yourself to pay a bill, so you tag that e-mail you received from the electric company (and that you dropped into OneNote) with the **To Do** tag. Or maybe there is a movie you want to see but you keep forgetting, so you jot it down the moment it comes to mind and then add the **Movie to see** tag to it. OneNote comes with several predefined note tags, such as **Important**, **Question**, and **Remember for later**.

- On the **Standard** toolbar, click the arrow next to the **Tags** button, and then click the note tag you want.

But what good are tags if you can't find them? None. That's why we've made it so that you can search your notes by tag keywords.

1. On the **Standard** toolbar, click the arrow next to the **Tags** button, and then click **Show all Tagged Notes**.
2. In the **Tags Summary** pane, narrow the **Search** scope if needed, and then click **Refresh Results**.

Aha! There's the name of that movie ...

Unfiled Notes

OneNote 2007 uses a special section called Unfiled Notes to store information copied from your Web browser and other programs. The copied information can include text, pictures, screen clippings, and side notes. The Unfiled Notes section is sort of a lost-and-found or junk drawer for things such as screen clippings or side notes that you used OneNote to create, and whenever you used the **Send to OneNote** command in programs such as Windows Internet Explorer and Outlook 2007.

You'll find the Unfiled Notes section at the bottom of the list of all your notebooks in OneNote 2007. And while, yes, you can keep your things in that OneNote lost-and-found section for as long as you want, they tend to get quite lonesome and feel a sense of rejection, so how about you move them to another section, give them a home?

Page template

I love templates — I wrote my very first column about them. OneNote templates offer a great way to apply a uniform page layout and design for the pages in your notebook. You can create your own template by using the color scheme, a background image, and text formatting of your choice, or you can download one of the many OneNote templates we have on our site.

For example, if you have a notebook that is just for work, you can apply a specific work template to the pages within that notebook. And if you have one that keeps track of your kids' activities, dates, scores, and so on, you can have a different template for that notebook's pages. Note that templates can be applied only to new pages that do not already contain notes. To use a page template for notes you have already taken, create a new page from the template you want, and then copy your existing notes to it.

More information

Go to these pages to get the deep-down information you need about using the terms I described above.

- Insert a screen clipping into notes
- Flag important notes with note tags
- Find and organize Unfiled Notes
- Apply a template to new pages

"You've got to know much more than just the technicalities of notes; you've got to know what goes between the notes." — Jimi Hendrix

About the author

Annik Stahl, the Crabby Office Lady columnist, takes all of your complaints, compliments, and knee-jerk reactions to heart. Therefore, she graciously asks that you let her know whether this column was useful to you — or not — by entering your feedback using the **Did this article help you?** feedback tool below. And remember: If you don't vote, you can't complain.

Crabby Office Lady columns
Crabby's blog
Crabby's podcasts