

Working Version 1.5

Guide to using OneNote as a Research Notebook

OneNote as a Research Notebook: A guide to getting started

Introduction

Some tools are specifically designed as a research notebook however there are other, more generic, options that can also be used successfully.

This guide explains how to start using OneNote as a research notebook. It is based on OneNote 2016 and OneNote Office 365.

This is a working document and we welcome feedback and suggestions for improvement. Email: research-datamanagement@glasgow.ac.uk

Contents

1.	Accessing OneNote	5
2.	Types of notebook	6
3.	Create a Class notebook	7
4.	Create a personal/individual notebook	10
5.	Working with OneNote	
	5.1 Notebook structure	11
	5.2 Add sections and pages	12
	5.3 Re-arrange notebook layout and personalise	13
6.	Add content to a notebook	
	6.1 Add text	14
	6.2 Add tables; convert tables to spreadsheets	15
	6.3 Add images, audio and video	15
	6.4 Insert equations	16
	6.5 Add external files	17
	6.6 Insert links	20
7.	Manage notebook content	
	7.1 Annotate content	22
	7.2 Create and use tags and To Do lists	22
	7.3 Create and use page templates	23
	7.4 Add date and time stamps	24
	7.5 Create a table of contents	25
	7.6 Integrate with Outlook calendar and e-mail	25
	7.7 Convert handwriting to text	27
	7.8 Search notebook content and metadata	28
	7.9 Review changes and retrieve deleted content	28

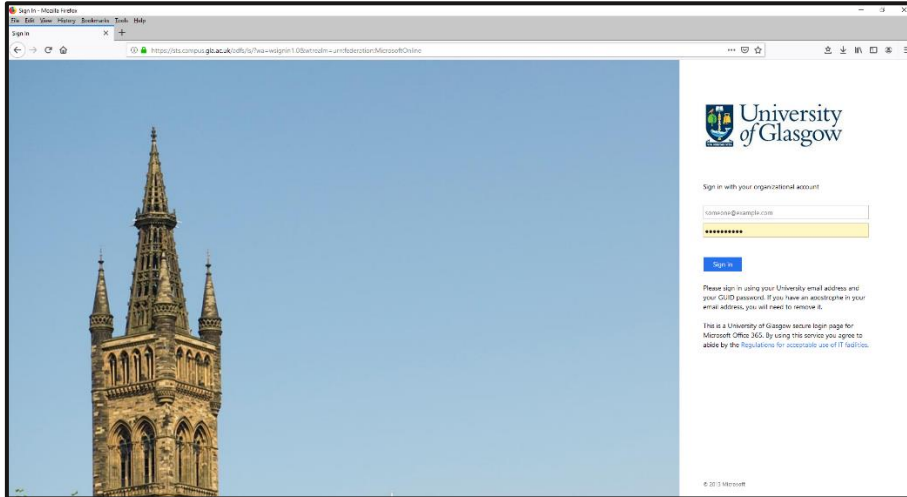
8.	Collaborative working and sharing content	
	8.1 Share an individual notebook	30
	8.2 Add new project leaders or team members to a Class notebook	31
9.	Export your notebook	32
10.	Using OneNote as a research notebook	
	10.1 Organise your notebook	33
	10.2 Manage data	34
	10.3 Back up your notebook	35
11.	Further help	36

1. Accessing OneNote

OneNote is available as part of the University of Glasgow's Microsoft Office 365 subscription. There are different routes to access OneNote. Two are given below.

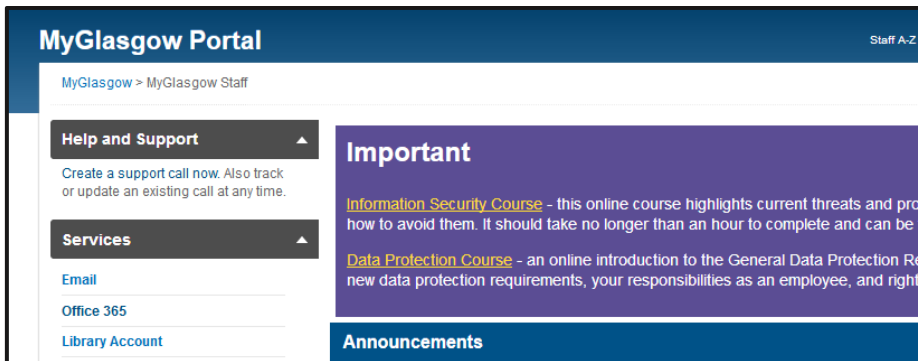
Option A:

Open your browser and navigate to <https://office365.gla.ac.uk/> . The University's Office 365 sign-in page will be displayed. Enter your university e-mail address and password to log in.

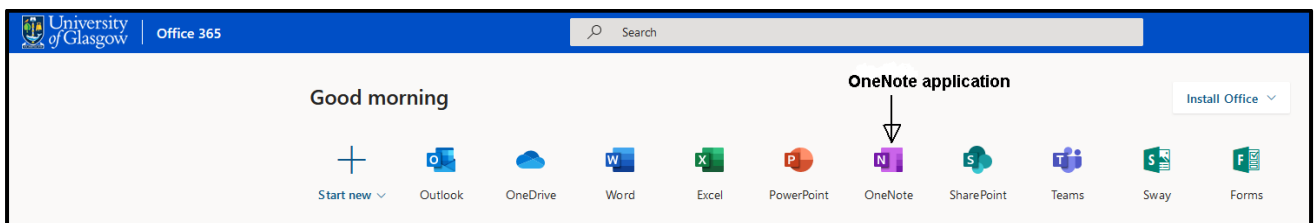


Option B:

Log into MyGlasgow and click on Office 365 under Services. Enter your university e-mail address and password to log into the University's Office 365 account.



Both routes lead to the University's Office 365 home page, where you can access a number of applications, including Word, Outlook, Excel and OneDrive. Select OneNote, which will take you to the OneNote landing page.



2. Types of notebook

You can create two types of notebook in OneNote.

Class Notebook

This is a shared notebook for teaching or team working. It typically consists of three sections:

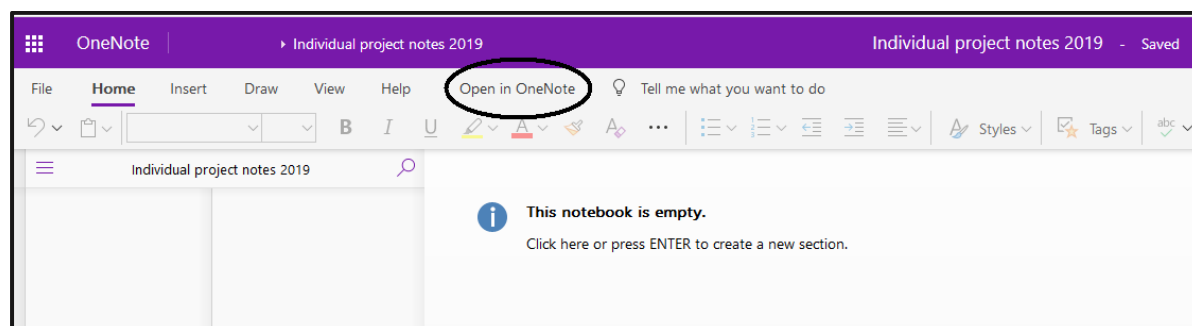
- **collaboration space** where all notebook users can add, read and edit content.
- **content library** for team documentation, course materials, policies, etc. Only the tutor/supervisor/project leader(s) can add materials to the content library, edit and delete them. All users can read and copy items in the content library.
- **workspace** for each team member/student. Each user can organise their space as they want and save their own work here. The tutor/supervisor/project leader(s) can read and edit all of the content in each team member/student's workspace but it cannot be accessed by any other team member/student unless the creator chooses.

Individual Notebook

This is a private notebook which can be structured and organised to suit the owner's preferences. Pages may be shared with other people if the owner chooses.

Saving notebooks

OneNote notebooks are saved in OneDrive. When you open a notebook, you will be taken to OneNote online. If you prefer to use the full, offline version, which offers greater functionality, click on the **'Open in OneNote'** option on the ribbon (this is the same as 'Open in desktop app' function in online versions of Word and Excel). Data is synchronised, so if you go back to the online version, the content will be up to date.

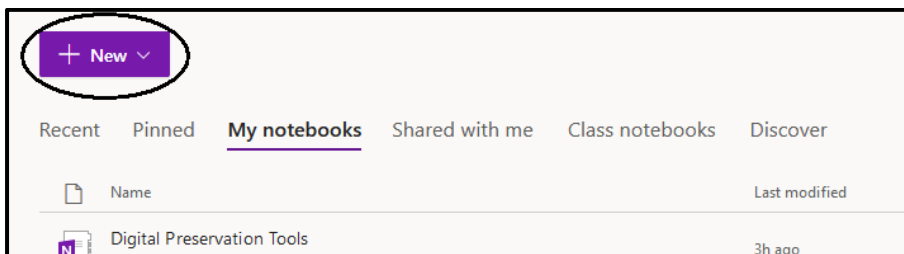


You can create multiple notebooks of each type if you want e.g. one for each personal or team project.

3. Create a Class notebook

Open OneNote from the University's Office 365 landing page (see section 1 of this guide). Any notebooks which you have already created or which have been shared with you will be listed.

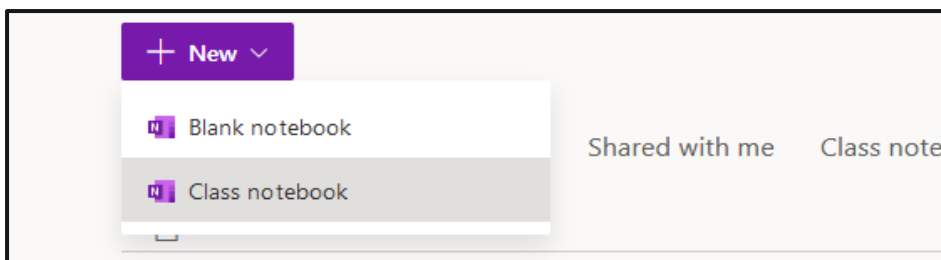
To create a new notebook, click on the 'New' button.



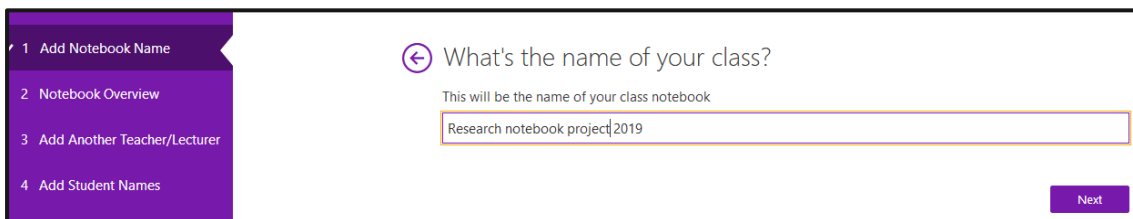
The drop-down list contains two options:

- create a blank notebook [this is an individual notebook]
- create a Class notebook.

Select the 'Class notebook' option from the list.

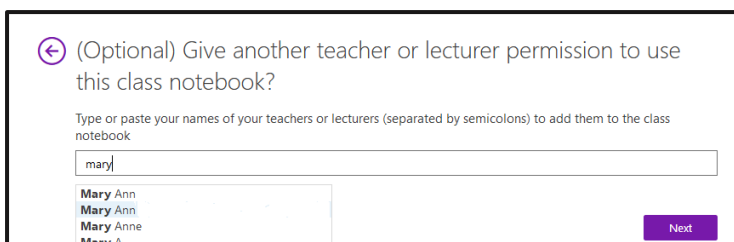


Give your notebook a name and click 'Next'.



You will be shown an overview of how the notebook is organised and which category of user has read/write permissions for each section. Click 'Next'.

You can add other people as tutors/project leaders. They will be able to add content and view/edit material in team member/student's workspaces. Start typing the person's name and a drop-down list of names from the University directory will appear. Click on the name you want and add a semi-colon. Repeat this for each person you want to add.

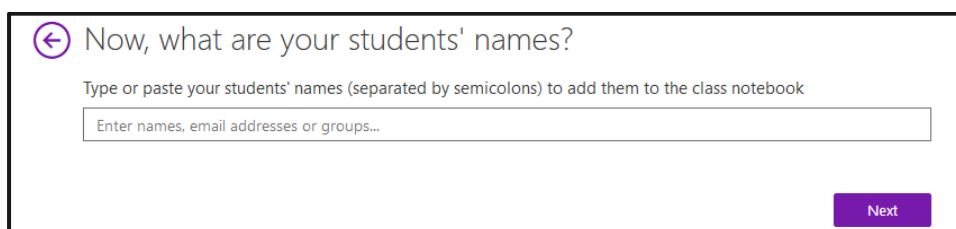


Additional project leaders or staff tutors can also be added later. If you do not want to add anyone, just leave the box blank. Click 'Next'.

Note about terminology:

Microsoft's Class notebook is targeted at schools so the terms 'teacher' and 'student' are used. For university project teams or staff/student work, 'teacher' will be the project leader, project administrator, principal investigator, supervisor or staff tutor. 'Student' will cover project team members or university students.

Add the names of students or staff team members who will be using the notebook. Again, names from the University directory will be displayed when you start typing. Add a semi-colon after each name.



← Now, what are your students' names?

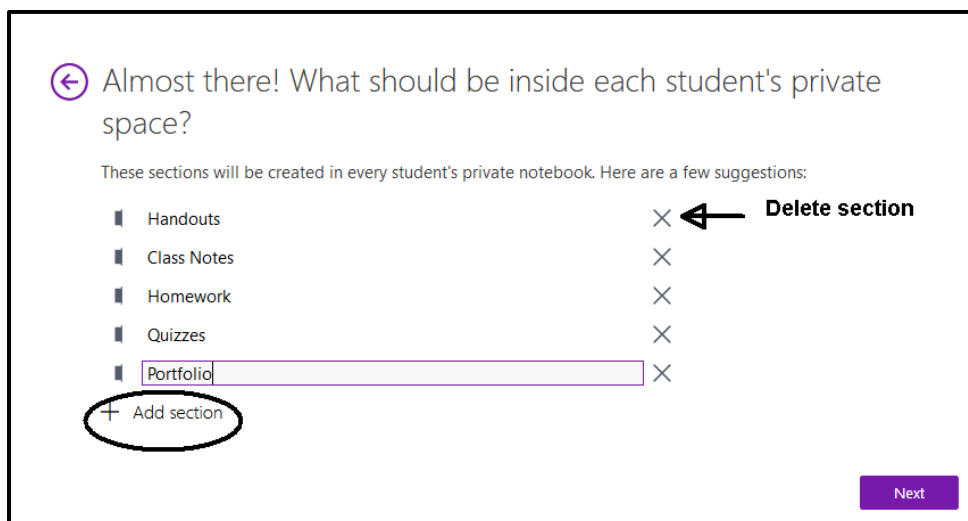
Type or paste your students' names (separated by semicolons) to add them to the class notebook

Enter names, email addresses or groups...

Next

Additional names can be added after the notebook has been created. Click 'Next'.

OneNote offers default sections for the team members' workspace. Click on the cross to delete any sections you do not want. To add an additional section, click 'Add section' and give it a name. Sections can also be added or deleted once the Class notebook is in use. Click 'Next'.



← Almost there! What should be inside each student's private space?

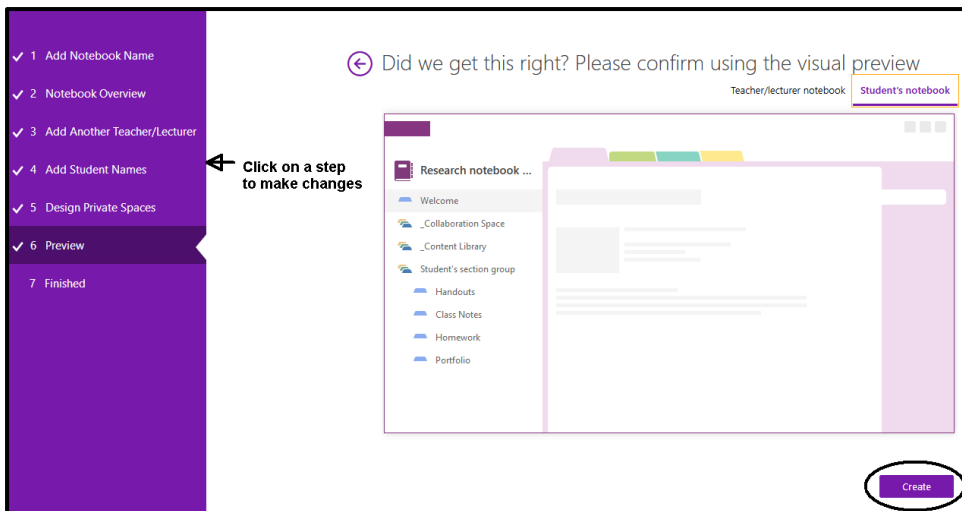
These sections will be created in every student's private notebook. Here are a few suggestions:

- Handouts X
- Class Notes X
- Homework X
- Quizzes X
- Portfolio X

+ Add section

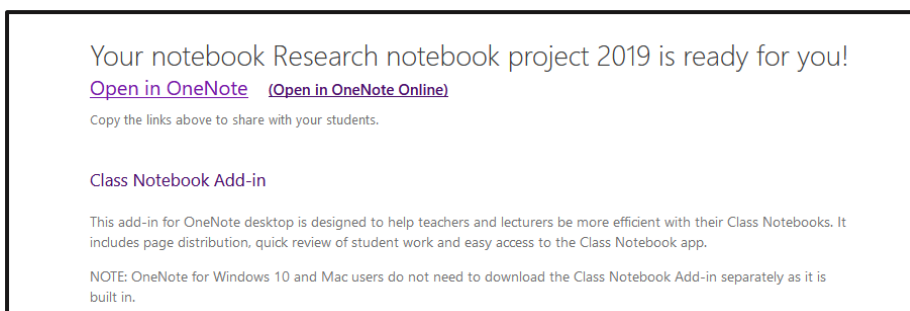
Next

View the preview image to see whether you want to change anything. If you want to make any changes, use the menu on the left to go back to the relevant section. Click 'Create' to complete the set-up process.



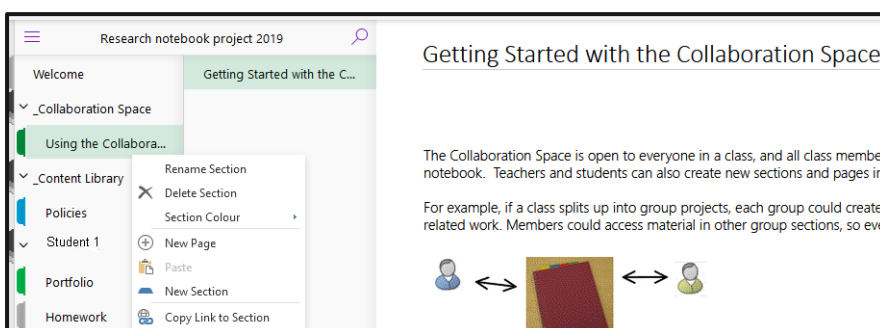
Everyone who has been added to the notebook as a user will receive an e-mail containing a link to the new Class notebook.

Click on one of the OneNote application links to open your new notebook. You can choose to open the notebook in OneNote (the full, offline version of the software) or the online version of the OneNote application.



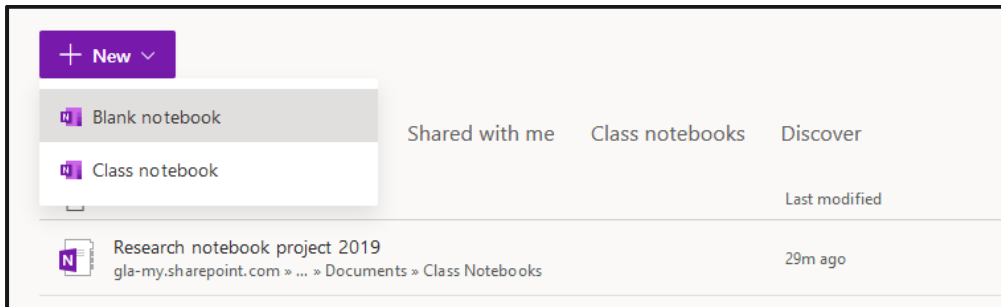
The online version of OneNote does not offer as many functions as the offline, full version. The two versions are synchronised so you can move between them easily.

When you open a new Class notebook, you will find a Welcome page with advice and links and overview pages under Collaboration and Content Library. These overview pages can be deleted if you want. Right-click on the page and select 'Delete'.

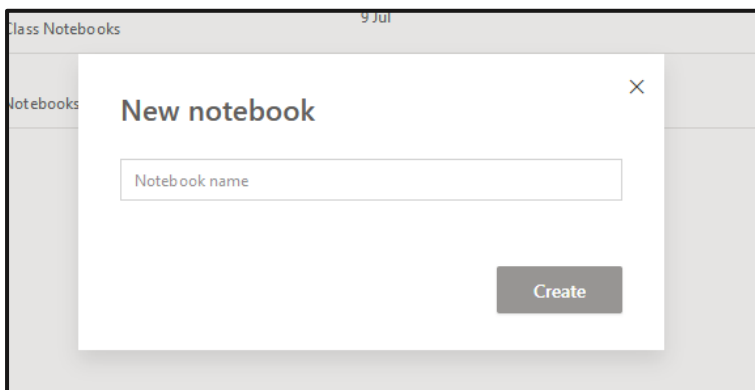


4. Create a personal/individual notebook

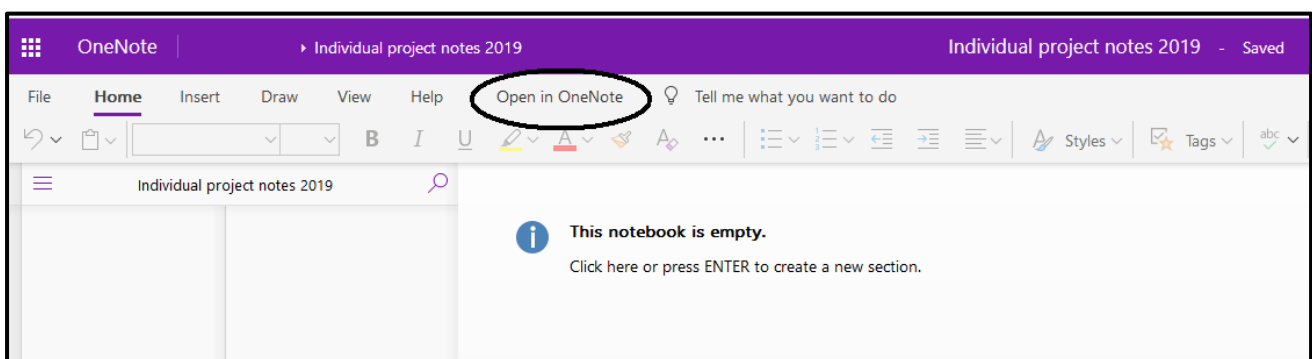
Open OneNote from the University's Office 365 landing page (see section 1). Click 'Next' and select the 'Blank notebook' option from the drop-down list.



Type in a name for your notebook.

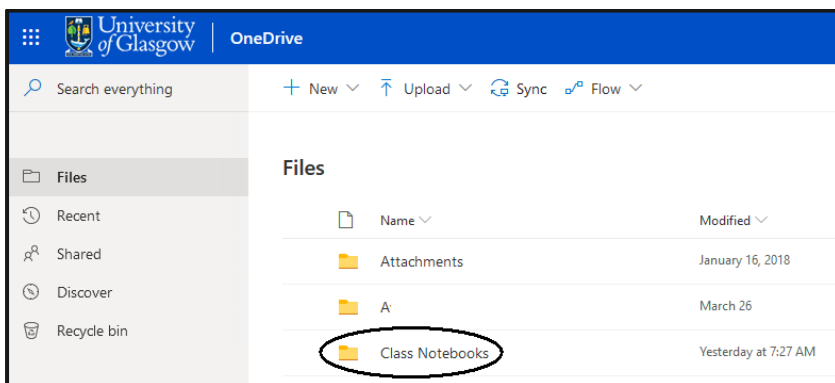


The notebook is created and opens in OneNote online. You can continue in OneNote online or click on 'Open in OneNote' to switch to the OneNote full, offline application.



5. Working with OneNote

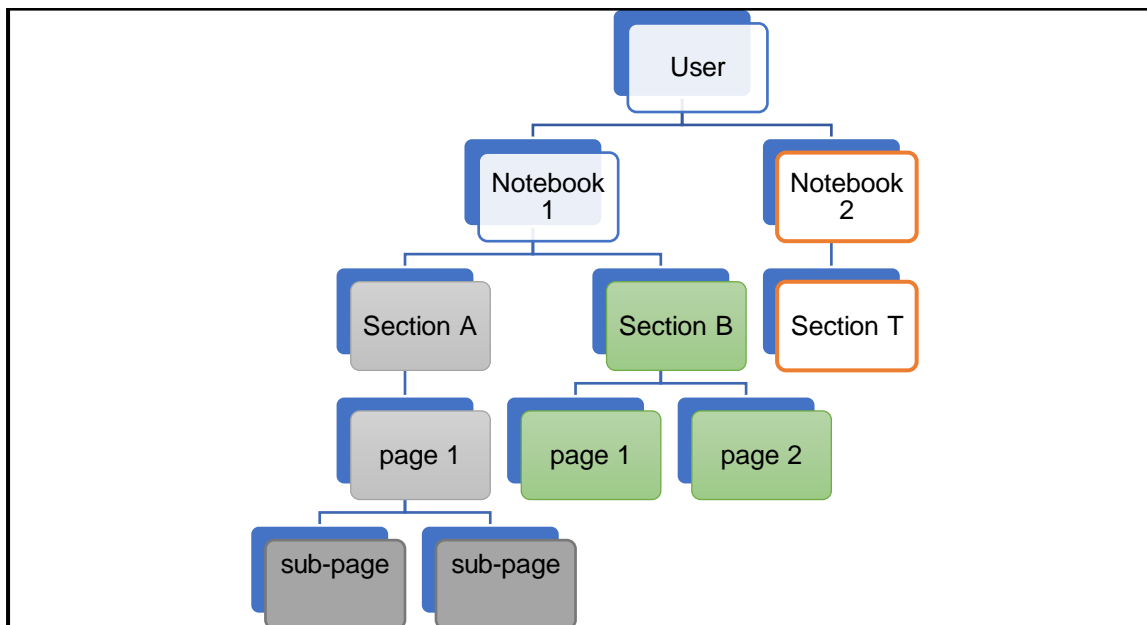
To open an existing notebook, open OneDrive, where you will see a folder called **Class notebooks** and another called **Notebooks** (this contains your individual notebooks). Open one of these folders and select the notebook you want to work on. Alternatively, if you want to work in OneNote offline, you can open OneNote offline using the menus/software shortcut on your device and then go to File menu/'Open' to open your notebook.



Folder containing Class notebooks in OneDrive

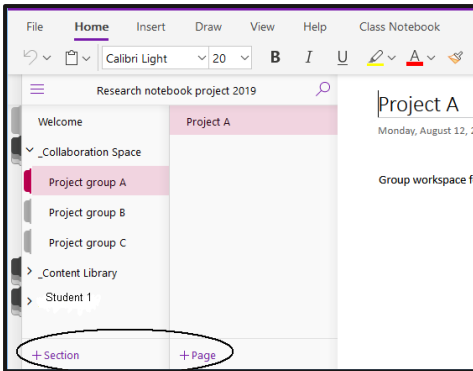
5.1 Notebook structure

Notebooks are divided into **sections**. Each section contains **pages**. Multiple levels can be added e.g. sub-pages and sub-sub-pages. Sections can also be grouped. You can create as many sections and pages as you need. How you create sections and pages depends on whether you are using OneNote online or OneNote offline.

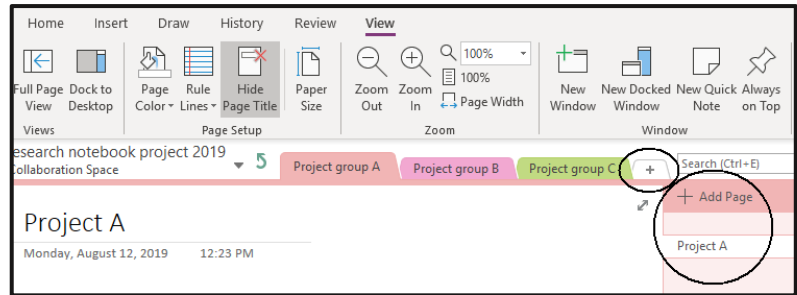


Example of arrangements of notebook structure

The online and offline versions of OneNote differ in the way notebooks are laid out. The online version has section tabs down the left side and buttons to add new section or page at the bottom of the page. OneNote full, offline version has the section tabs across the top and the new section/page buttons on the right.



Online page notebook overview



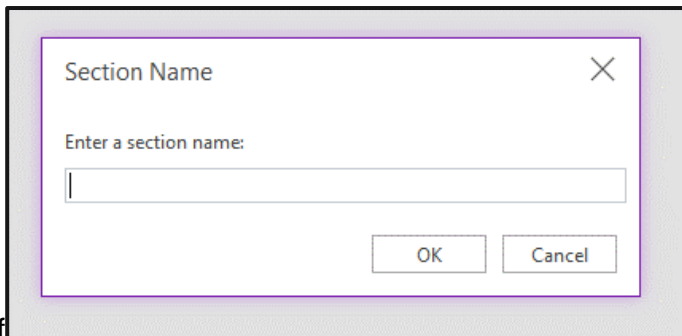
Offline version notebook overview

Buttons for adding sections and pages highlighted

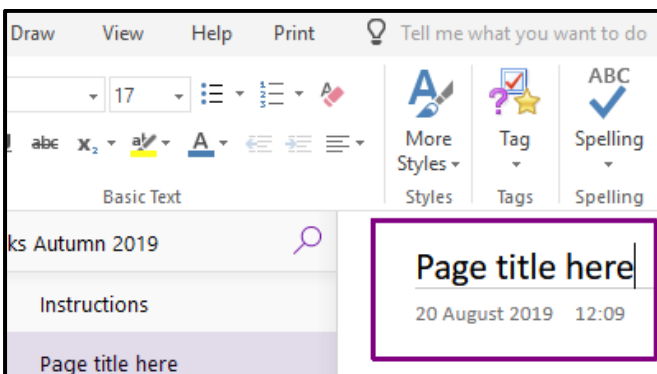
5.2 Add sections and pages

Add sections and pages: OneNote online

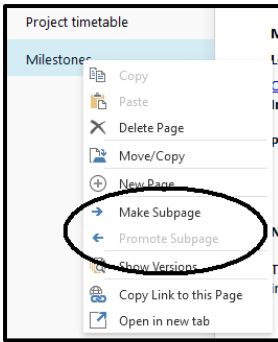
OneNote online: To start creating sections, click on the '+Section' button in the bottom left of the screen. Type the section name in the dialogue box which appears. You can use the 'Add section' button at any time to add new sections to your notebook.



To add pages, first click on the section tab for the section into which you want to add your page. Then click the '+Page' button at the bottom of the Page column. Type the page title at the top of the new page.



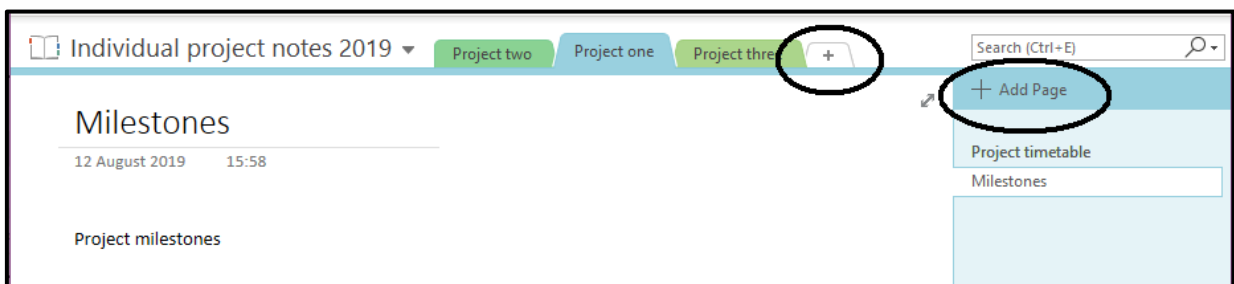
To create a sub-page, add a new page, then right click on the page name. Select 'Make subpage'. You can do this to existing pages to convert them to sub-pages. Click 'Make subpage' again to make a sub-sub-page. Sub-pages can also be promoted, using 'Promote subpage' on the same menu.



Create sub-pages or promote them

Add sections and pages: OneNote offline

OneNote offline version: to add a new section, click on the tab with a + symbol along the top. To add a new page to a section, click on the section tab and then click on 'Add page' on the right sidebar. Sub-pages at multiple levels can be created in the same way as in OneNote online. Right-click to select 'Make sub-page'.



5.3 Re-arrange notebook layout and personalise

The order of sections or pages within a notebook can be changed by dragging a section tab or page title to a new position.

To change the colour of a tab, right-click on the tab, choose 'Section colour' and pick a new colour.

To rename a section, right-click on the tab and select 'Rename'. To rename a page, go to the page and change its title.

Group sections

If you have lots of sections, you can group them. Right-click on any section tab and select 'New Section Group'. A different tab symbol appears on the right. Give it a name. You can either move existing sections into this group by dragging their tab or create new sections under the section group tab in the usual way.



Section group tab

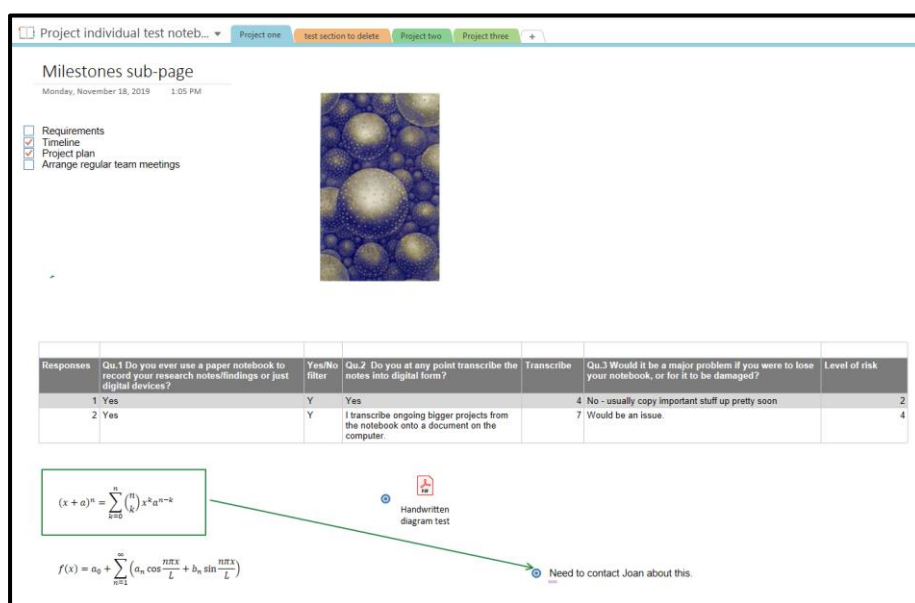
6. Add content to your notebook

Within OneNote you can create and edit content, import it from other sources, add searchable tags and view metadata about page authors and versions. Details of some of these functions are given on the following pages.

NOTE: To access OneNote's full set of functions, use OneNote offline.

A OneNote page is more flexible than a Word document and allows you to add content wherever you want in whatever order. It is not limited to standard paper sizes, although you can use page templates to make your page A4, for example, if you want to. Content is added in boxes, which can be moved around the page. Just click where you want to add your content. You can add text, drawing, pictures, video and to do lists, link to external content, insert content from external files and attach files.

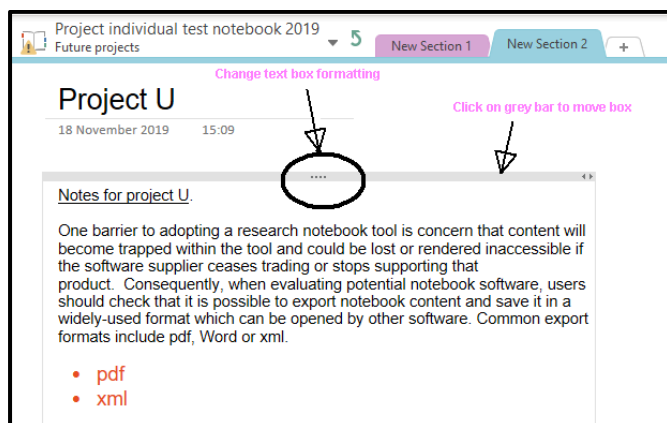
NOTE: If you want to keep content together, it is best to enter it within one content box.



Page with selection of content type

6.1 Add text

Click anywhere on a page and start typing. Text is entered within a box. You can format the text as you would in Word e.g. change font type, size or colour, underline, add bullet points. Click on the grey bar at the top of the text box to move it or the right side to resize it.



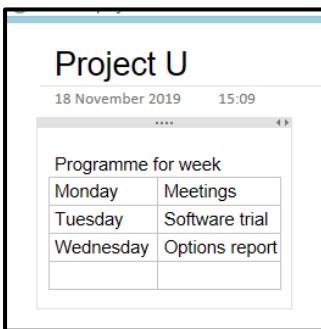
Text box with formatted text

6.2 Add tables; convert tables to spreadsheets

It is very straightforward to create tables in OneNote.

Click on the page to open a text box (or add to an existing one). Type the text for your first table cell and press 'Tab'. OneNote will start creating table columns. To move to the next row, press 'Enter'.

Alternatively, go to the Insert toolbar/'Table' button and specify the rows and columns. The table is inserted and data can be entered



Project U
18 November 2019 15:09

Programme for week

Monday	Meetings
Tuesday	Software trial
Wednesday	Options report

Table created using Tab and Enter

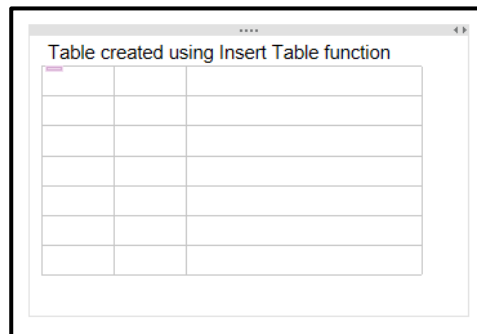


Table created using Insert Table function

Table created with Insert table function

You can convert a table constructed using either method into an Excel spreadsheet. Right click on the table and select 'Convert to Excel spreadsheet'. Click on the 'Edit' button and the spreadsheet will open in Excel.

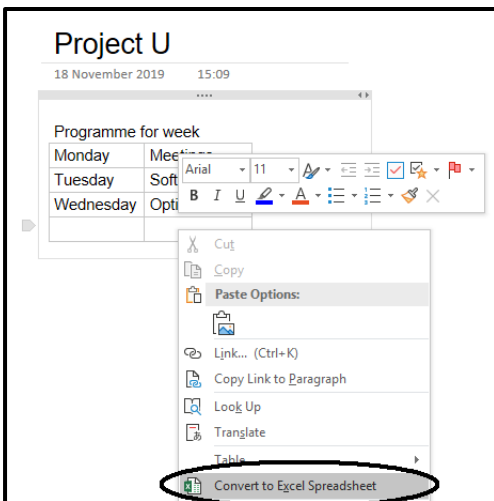
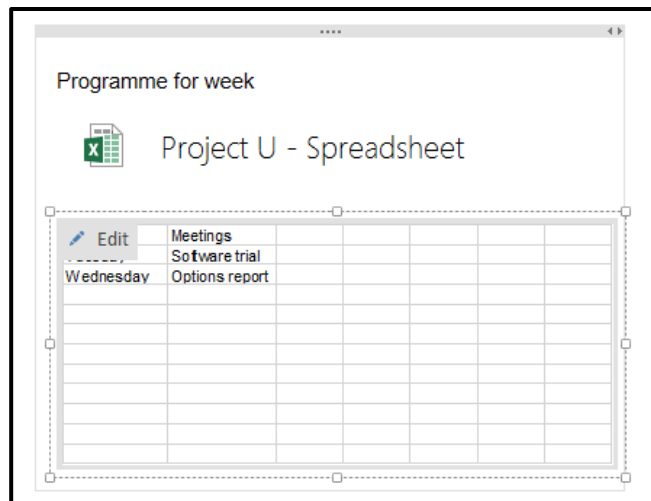


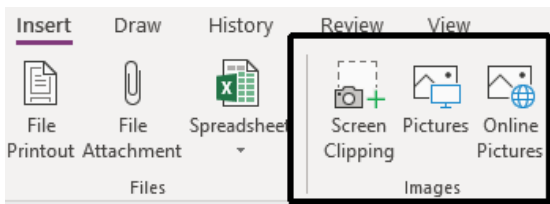
Table created using Tab/Enter converted to an Excel spreadsheet



6.3 Add images, audio and video

Images

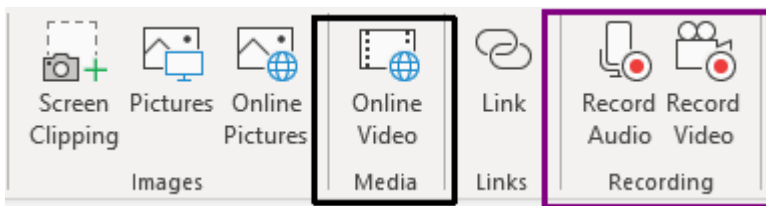
Options to add pictures are under the Insert toolbar. You can take a screen clipping, insert an image from a file store by browsing to it or by using drag/drop, or insert an image from the internet. You can also take a snip, copy it and paste it in, or right click and copy and paste images.



Option on Insert tab for adding images

Audio and video

You can attach external audio and video files into a OneNote page as you would any other file, using 'Insert'/'File attachment'. You can also embed an external video by using the 'Online Video' button. Click on the button and insert the hyperlink in the dialogue box which appears. The video can then be played from within OneNote.



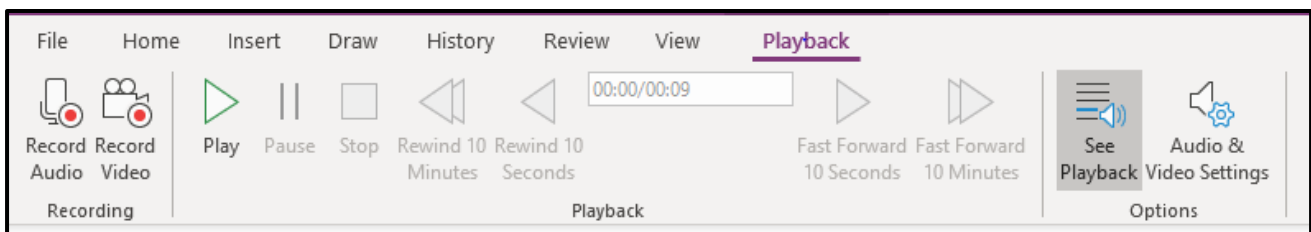
Button to embed external video; buttons to record audio/video within OneNote

Record audio and video within OneNote

If you have the technology to record audio or video e.g. using your smartphone, you can do this within OneNote and add the recording to your notebook page.

NOTE: it is only possible to record audio if you are using OneNote online.

Click on the page where you want to insert the recording. Go to Insert toolbar and 'Record Audio' or 'Record Video'. OneNote will start recording. Press 'Pause' or 'Stop' to end the recording. Click on the file and the Playback toolbar will be displayed.



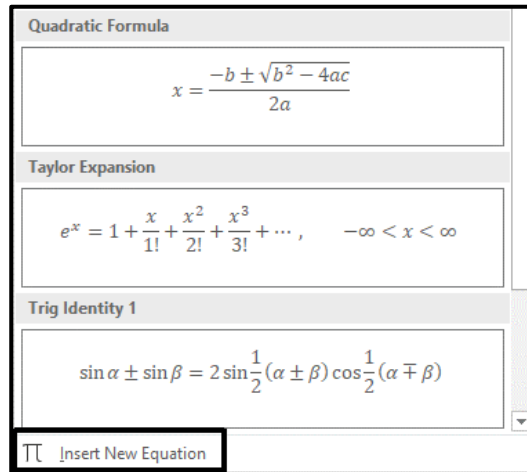
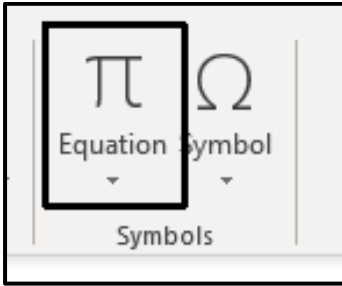
Playback toolbar

You can make notes on your OneNote page while recording.

It is possible to index audio/video to enable OneNote to search a recording for words. However, this can take a long time and slows down searches so it is not recommended.

6.4 Insert equations

OneNote has an equation function. You can use this to insert common equations or build your own. The equation function is on the Insert toolbar. Click on the down arrow below the button to see the picklist of available equations. At the bottom of the list, you will find an option to build your own equation.



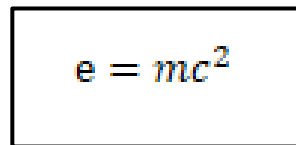
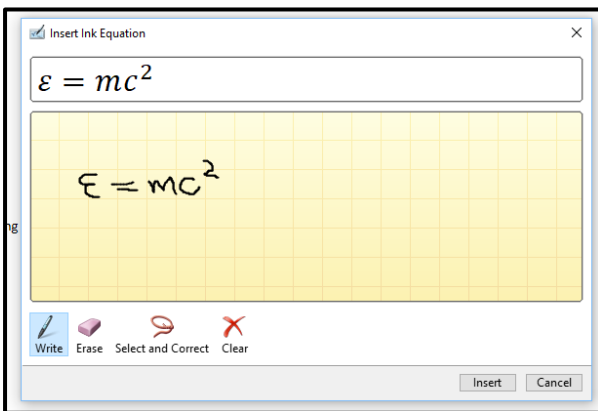
Above: Insert Equation button

Right: Part of equation picklist, with option at bottom to insert a new equation

When you select 'Insert new equation', the equation builder toolbar will be displayed. This offers symbols and structures to help you put together your equation. The 'Ink equation' button allows you to handwrite the equation using the mouse or other input device and convert it to type.



Build equation toolbar

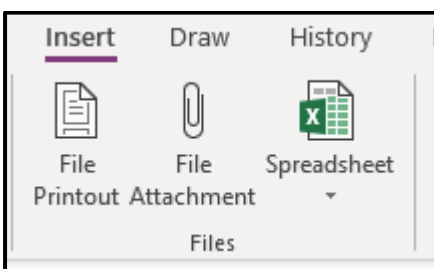


Left: Handwritten equation

Above: Same equation converted to type.

6.5 Add external files

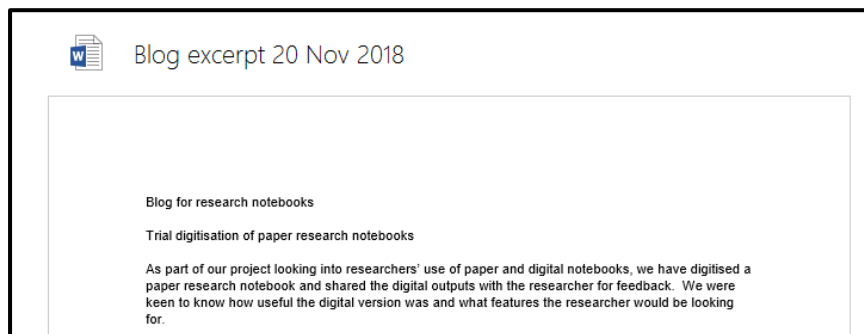
External documents can be inserted or attached to OneNote pages, depending on the original document type. Document contents can also be copied and pasted onto a page.



Insert toolbar with options to insert (file printout) or attach files. Dedicated Excel button on right.

Insert file contents to view on page (file printout function)

Use the 'File Printout' button to insert **Word, PowerPoint, pdf and txt files** into a OneNote page (see instructions below for Excel files). It does not work with all file types. Click on the page where you want to insert your document, go to Insert/'File Printout', navigate to your document and select it. The contents of Word, PowerPoint and txt files added using this function can be searched by OneNote.

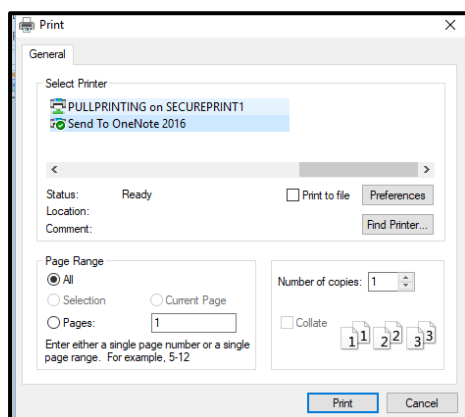


Word document inserted using File Printout function

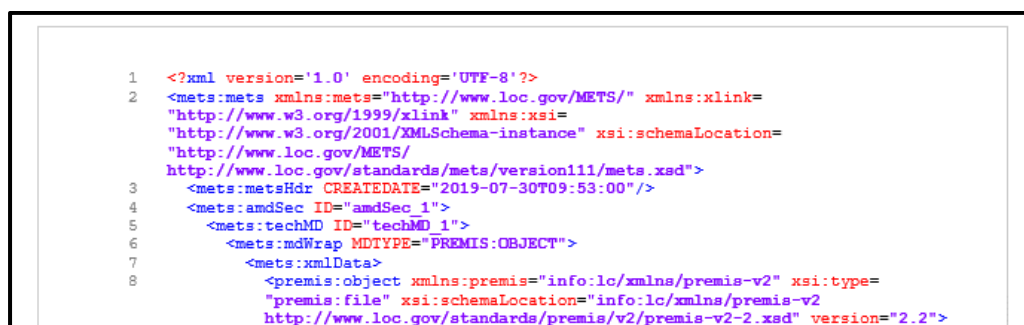
For some file types, document contents can also be copied and pasted onto a OneNote page.

Print/Send to OneNote function

An alternative way to insert files into OneNote is to use the Print/'Send to OneNote' function within some applications. This works for **Access databases** and **xml files** opened in Notepad++.



Option to Send to OneNote in the Windows Print dialogue box

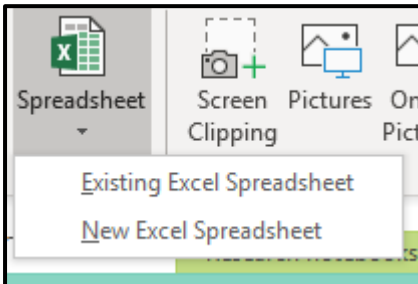


Insert attachments

Documents can also be attached to OneNote pages. Click on the page where you want to attach your document, go to Insert>'File Attachment', navigate to your document and select it. It is not possible to view or search attached documents within OneNote. When you double-click on the document link, the document will open in the software it was created in e.g. PowerPoint or another suitable tool.

Insert Excel documents

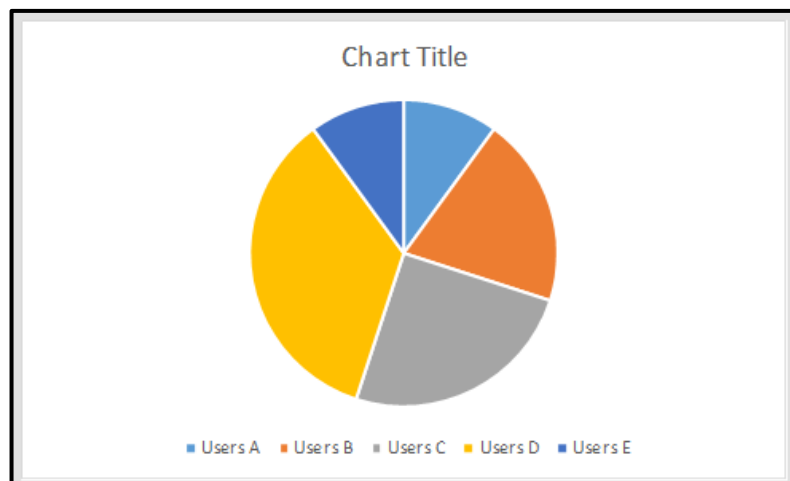
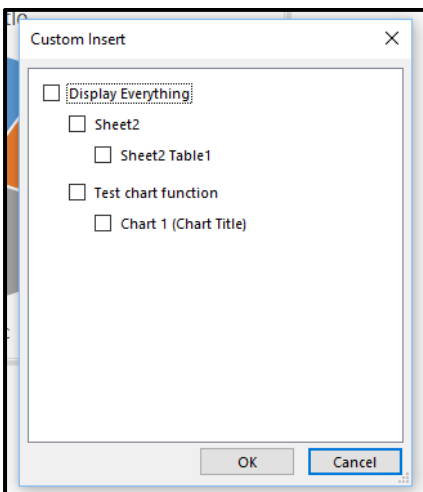
Under Insert, there is a button specifically to insert or attach Excel files.



Select 'Existing spreadsheet' option to insert or attach an Excel spreadsheet. The 'Attach' option works in the same way as other file types. The file is attached to a OneNote page but is opened and edited in Excel.

The 'Insert spreadsheet' option works like the file printout option and the spreadsheet is inserted on the OneNote page. If it consists of multiple worksheets, they are all inserted.

Under 'Existing Excel spreadsheet', there is a third option to insert an Excel chart or table. Once you have selected the spreadsheet, you will have the choice to insert just one worksheet from it (for a multi-sheet spreadsheet), or just a table or chart within it. The inserted content can only be viewed in OneNote, it is edited in Excel.



Option to just insert an Excel chart. Chart inserted on OneNote page

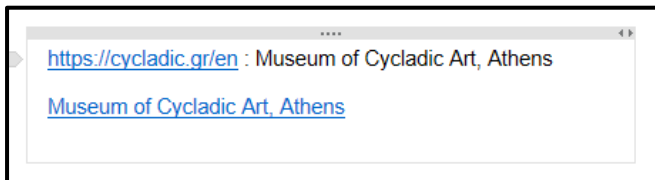
NOTE: attached or inserted files will not be automatically updated if you make changes to the original external file.

6.6 Insert links

You can insert hyperlinks to webpages and external data, as well as to pages and sections within your notebooks.

Link to a webpage

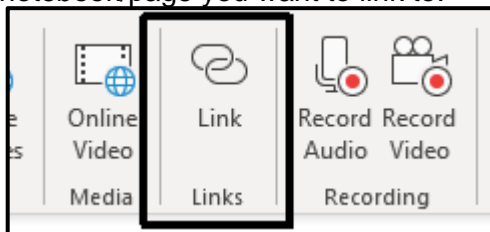
To add a link to a webpage, you can simply copy and paste the link onto your notebook page. Use Insert/Link' button to give the link a title, rather than just display the URL.



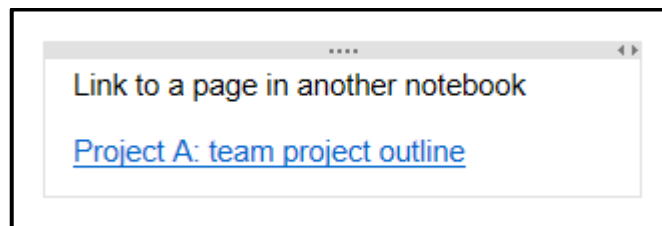
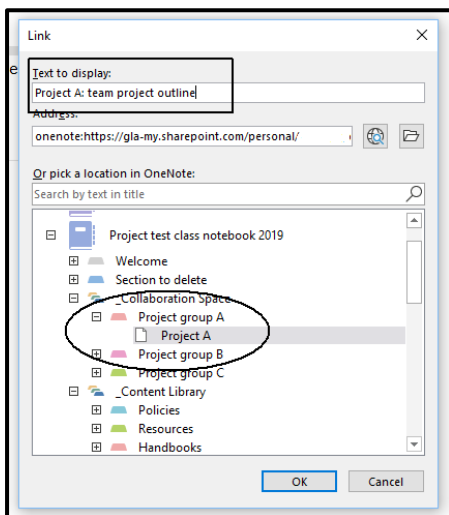
Top link: URL pasted in. Bottom link: Insert/Link function used

Link to other Notebook pages

The Link function can also be used to create links within your notebook or to pages/sections in another OneNote notebook. Click where you want to insert the link, click 'Link' and navigate to the notebook/page you want to link to.



Link button



Left: Add link to a page in another OneNote notebook, creating title for link.

Right: Link inserted into OneNote page.

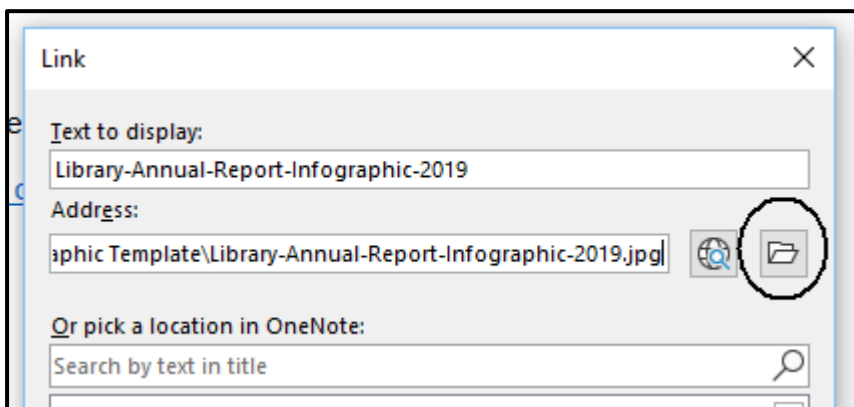
Link to documents and data

OneDrive

You can insert links to documents and folders stored in OneDrive. Navigate to the folder or document and select 'Copy link'. Paste the link into your OneNote page. Access to the content by other users who have access to your notebook will depend on user permissions. It may also be possible to link to other file stores and data repositories.

Institutional servers

The Insert/Link function can be used to insert a link to a document stored on university servers. Click on the folder symbol (circled in screenshot) and navigate to the file. You can change the title of the link.




You could also just copy the file path and insert it into your notebook for reference e.g. "H:\Articles and resources\Assessment of cost models 4C May 2014.pdf".

This will not create an active hyperlink but will remind you where to find specific documents or data.

7. Manage notebook content

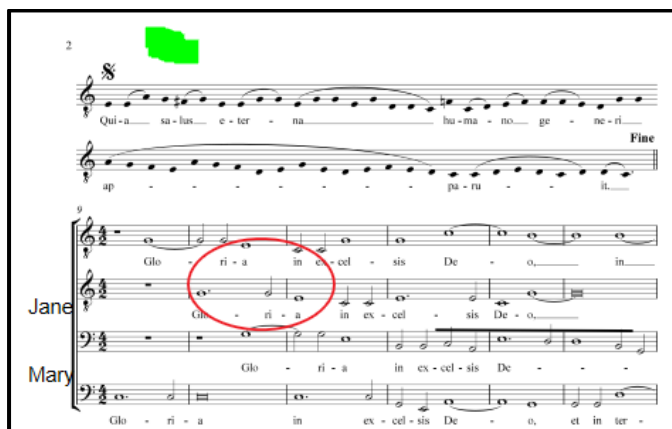
7.1 Annotate content

Content typed directly into OneNote or inserted material can be annotated. The pdf version of a music score shown below was inserted into OneNote and subsequently annotated using the drawing tools (found under Draw toolbar).



A musical score for a hymn, showing the first two systems and the beginning of a third system. The first system has two staves with lyrics: "Qui-a sa-lus e-ter-na hu-ma-no ge-ne-ri" and "ap-pa-ru-it". The second system has two staves with lyrics: "Glo-ri-a in-ex-cel-sis De-o, in" and "Glo-ri-a in-ex-cel-sis De-o,". The third system has four staves for voices: Jane, Mary, Mark, and Ian. Jane's staff has lyrics "Glo-ri-a in-ex-cel-sis De-o, in" and a red circle around the notes for "in-ex-cel-sis". Mary's staff has lyrics "Glo-ri-a in-ex-cel-sis De-o,". Mark's staff has lyrics "Glo-ri-a in-ex-cel-sis De-". Ian's staff has lyrics "Glo-ri-a in-ex-cel-sis De-o, et in ter-". There are green highlight boxes on the first staff of the first system and on the word "Fine" at the end of the second system. A red circle is drawn around the notes for "in-ex-cel-sis" in Jane's part.

NOTE: if you annotate content in OneNote and then move the content, either within the page or to another page, the annotations will not automatically move with the content box. The image below shows the score after it was re-sized – the annotations are now in the wrong place. You may prefer to edit your content using another tool and insert the annotated material into OneNote.

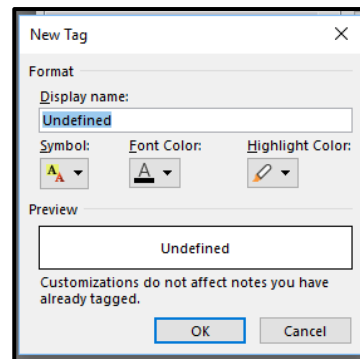
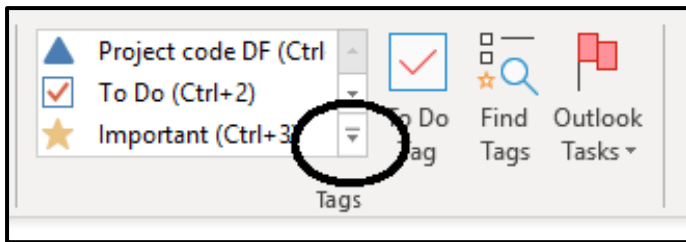


The same musical score as above, but the annotations are now in the wrong place. The green highlight box is now on the first staff of the first system, and the red circle is now around the notes for "in-ex-cel-sis" in Jane's part, which is now on the second staff of the second system. The word "Fine" is still highlighted in green, but it is now on the second staff of the first system.

Resized document with annotations now out of place

7.2 Create and use tags and To Do lists

Notebook content can be tagged and the tags used to manage content and search the notebook. Tags supplied by OneNote can be modified or deleted. Custom tags can be created.



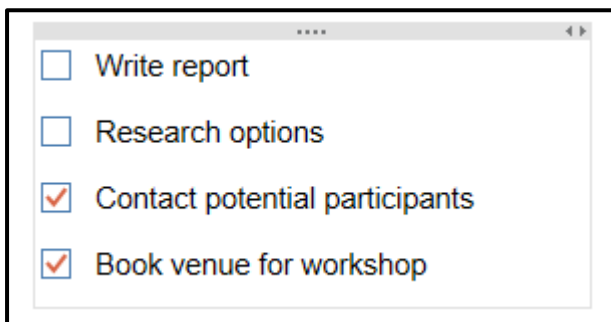
Left: List of tags Right: Dialogue box to create own tags

Click on the page where you want to insert your tag. In the Tag section on the Home toolbar, click on the down arrow (circled in screenshot) beside the tag list. This will display the full list of tags. Select a tag.

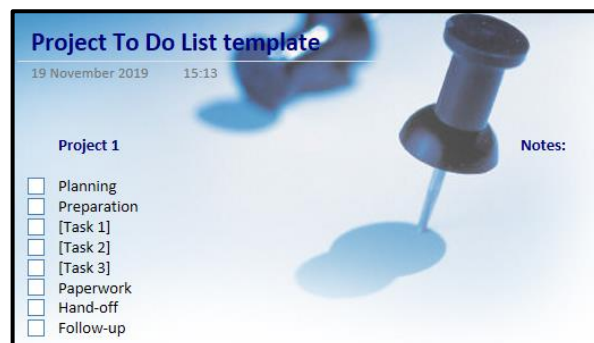
To modify an existing tag, click on tag name and 'Modify Tag'. Click on the up or down arrows to change the position of a tag in the list. Click on 'New Tag' to create your own tag.

To Do lists

To insert a To Do list, click where you want to start your list and then click on the 'To Do' tag. A tick box will be inserted. Add your text and enter to add another box. Click in the box to insert a tick. You can drag the boxes to re-order your list.



To Do list created using To Do tag



Project To Do list template

There are also pre-configured To Do list templates under Page templates (see below for information about templates).

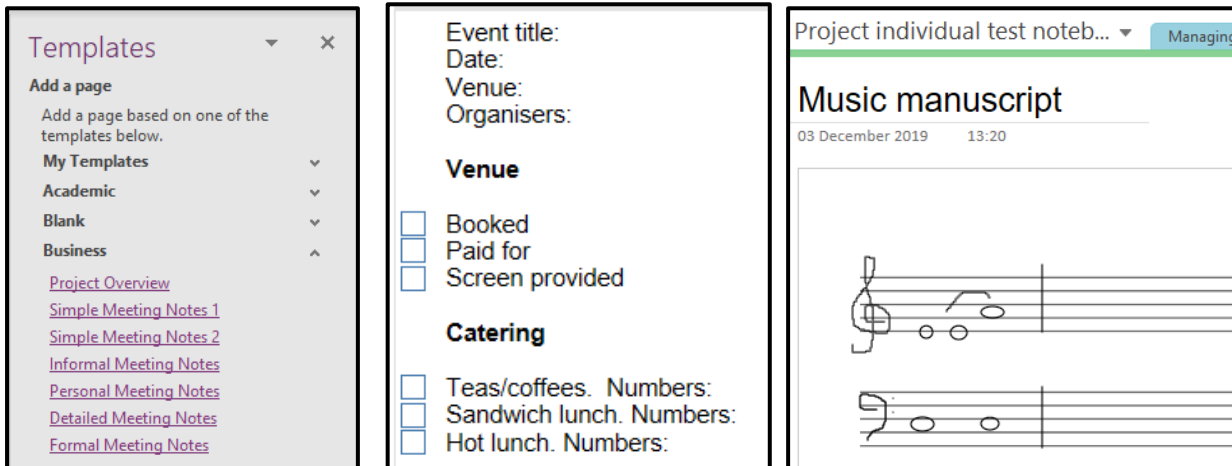
7.3 Create and use page templates

OneNote offers a selection of templates for pages. You can also create your own templates. This can be useful if you regularly record the same type of information, when planning events, for example, or conducting experiments.

Go to Insert/'Page Templates' to see the list of templates. Business templates include layouts for recording meeting notes and project details. There are also To Do lists. You can set the page size e.g. A4 or choose a background colour.

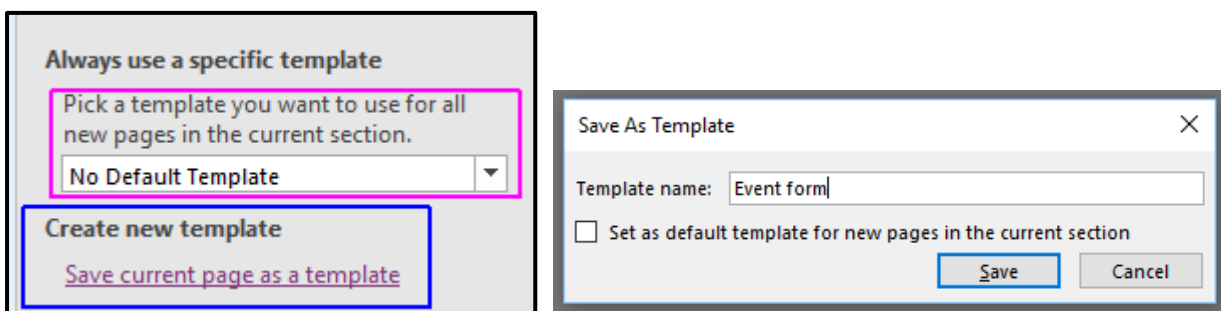
If you want to use a standard template for a whole section, go to the bottom of the 'Page Templates' options box. You will see an option 'Always use a specific template'. Pick your preferred template

from the list. When you add new pages to your section, they will use the template. For example, you could create a section for meeting notes with all pages using the same meeting notes template.



List of standard templates New custom templates: event organiser and music manuscript

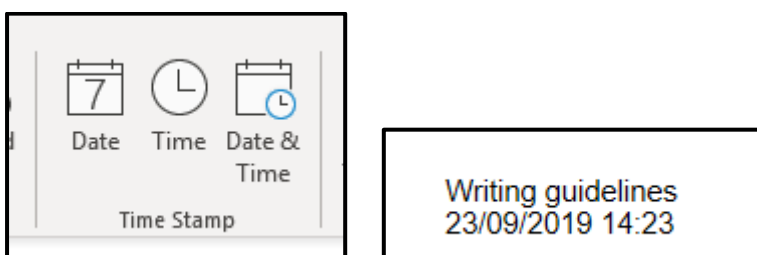
To create your own template, add a new page or select an existing one and configure your content. Click on 'Page Templates'. At the bottom you will see the option 'Save current page as a template'. Click this and give your template a name. You can also set it as a default template if you want. The template will then be available under 'Page templates'/'My templates'.



Left: Page Template menu options to choose default page template or create your own
Right: Dialogue box to save your own template

7.4 Add date and/or time stamps to entries

You can add the current date and/or time to entries on a page. The buttons for this function are found under the Insert toolbar. The format will match the settings in your operating system. These entries can be deleted, so do not form an audit record.



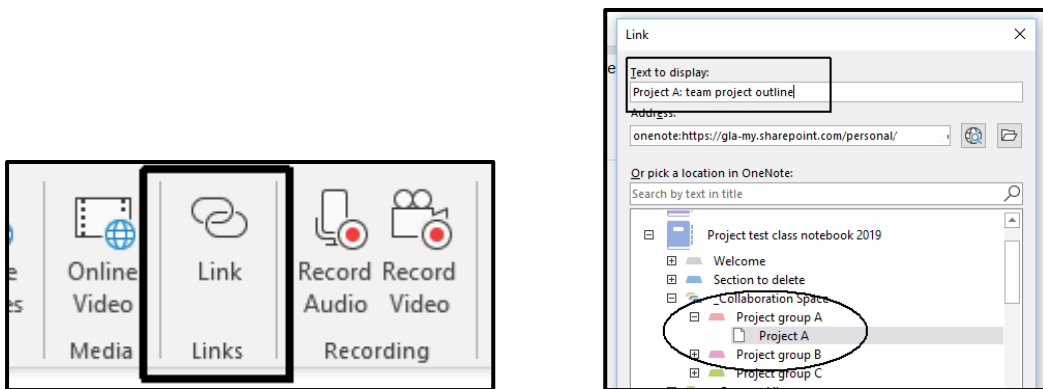
Date and time stamp functions. Page with current date and time inserted

OneNote will automatically record date and author each time a document is edited or a new one created. If you go to History/'Page Versions', content added to a page by each author will be indicated.

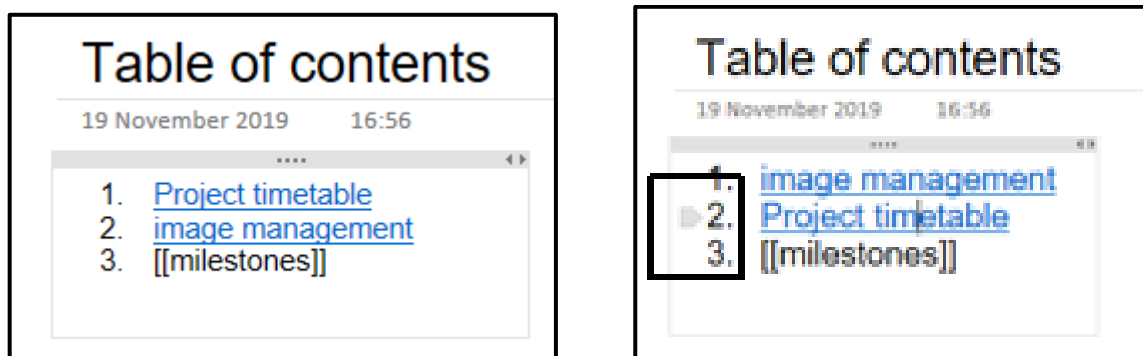
7.5 Create a table of contents

A table of contents can help you to keep track of your notebook contents. There are two methods.

You can insert links by using Insert/Link function. Click on 'Link' and use the notebook list to browse to the first page or section you require. Give the link a name and click OK. Repeat this for each item you want to include in your table of contents.



Alternatively, you can create links on your Contents page by typing the page titles within square brackets e.g. `[[Milestones]]`. When you press Enter, this will convert to a link. Do not use the same title in multiple places within your notebook if you want to use this option.



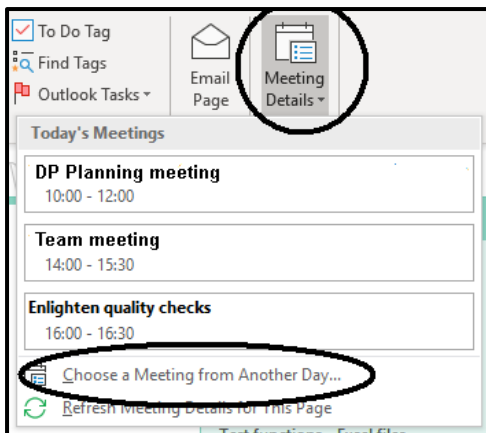
Left: Links inserted using square brackets. Right: Items 1 and 2 on list swapped using grey cursor.

You can re-order the items in your table of contents. Hover your cursor over a link and a grey marker will appear on the left. You can then grab the cursor and drag it to move your content link to a new position.

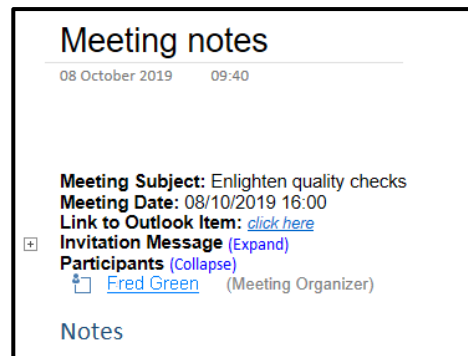
7.6 Integrate with Outlook calendar and e-mail

Meeting notes: link to Outlook calendar and co-edit

Use the 'Meeting Details' button on the Home toolbar to link notes to a meeting in your Outlook calendar. Click on the 'Meeting Details' button. The current day's appointments are listed in a dropdown list; you can use the option 'Choose a meeting from another day' to navigate to meetings on other days. When you select your meeting, the meeting details are entered on the OneNote page, with a link back to the calendar entry and e-mail link to organiser.



Meeting details button, list of today's appointments and link to calendar to select different appointment.

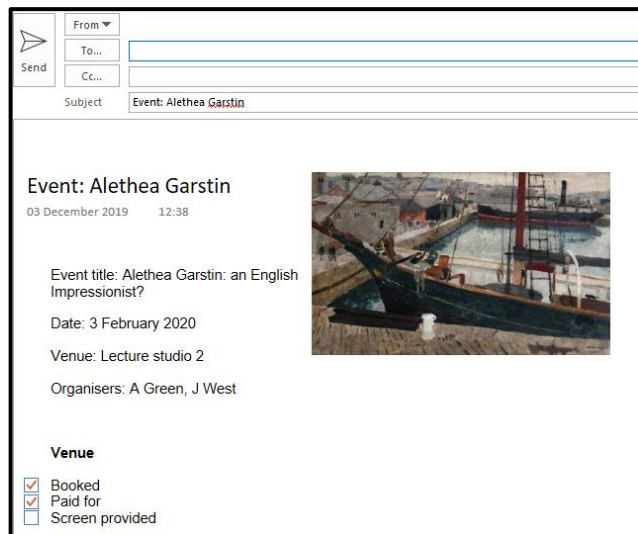
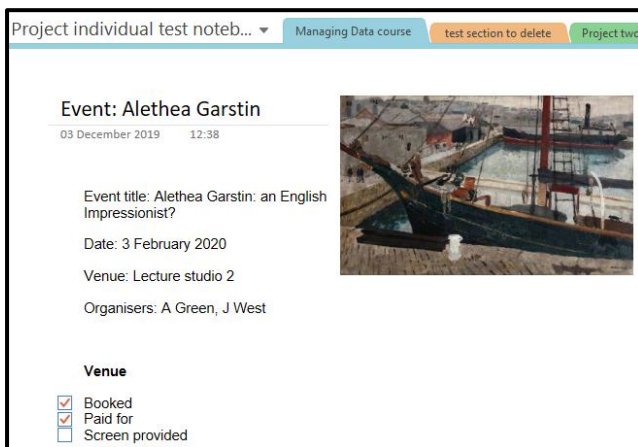


Calendar information inserted into OneNote page

If your notebook is shared with other users, everyone with edit permissions can add notes to the page at the same time. OneNote will sync automatically.

Integrate with Outlook e-mail

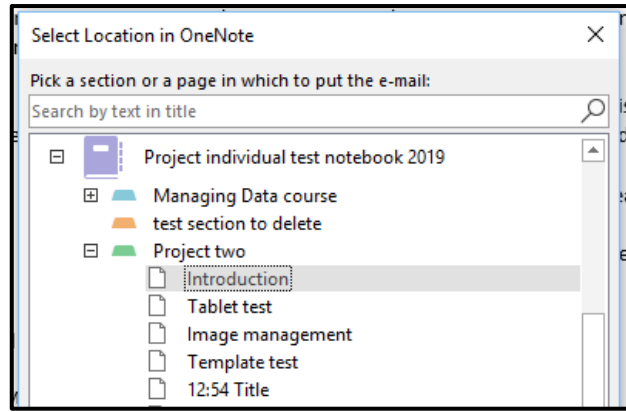
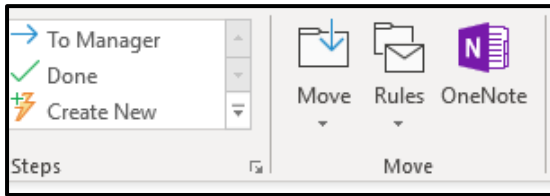
You can e-mail a OneNote page via Outlook. Navigate to the OneNote you want to send. On the Home toolbar, click on the 'Email Page' button (beside the 'Meeting Details' button; see screenshot above). The contents of the page will be inserted into an e-mail.



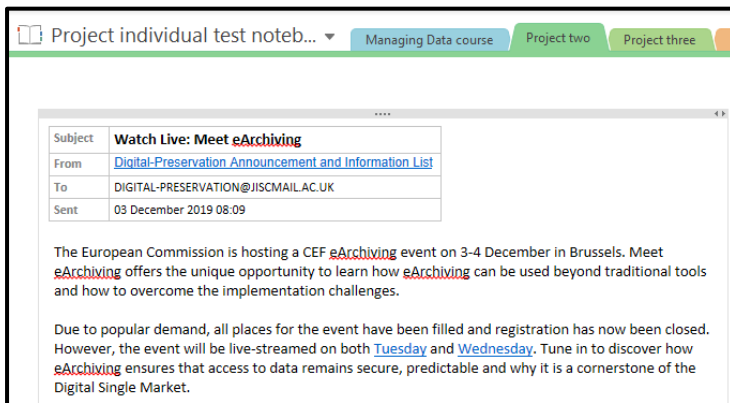
Left: OneNote page Right: page contents inserted into an e-mail in Outlook

You can also insert the contents of an e-mail in Outlook into a OneNote page.

In Outlook, select the e-mail message you want. Click on the OneNote button on the Outlook Home menu. A dialogue box will appear. Select the notebook and section/page where you want to insert your e-mail content by using the tree view or search bar. Click 'OK', the e-mail content will be inserted and opened in OneNote.



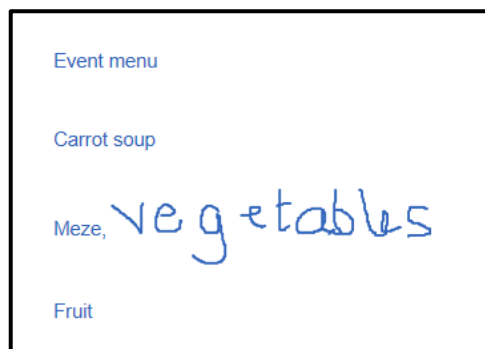
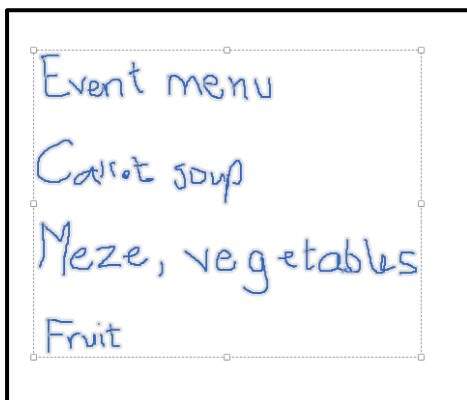
Left: OneNote button in Outlook Right: dialogue box to insert e-mail content into OneNote page



E-mail content inserted into a OneNote page

7.7 Convert handwriting to text

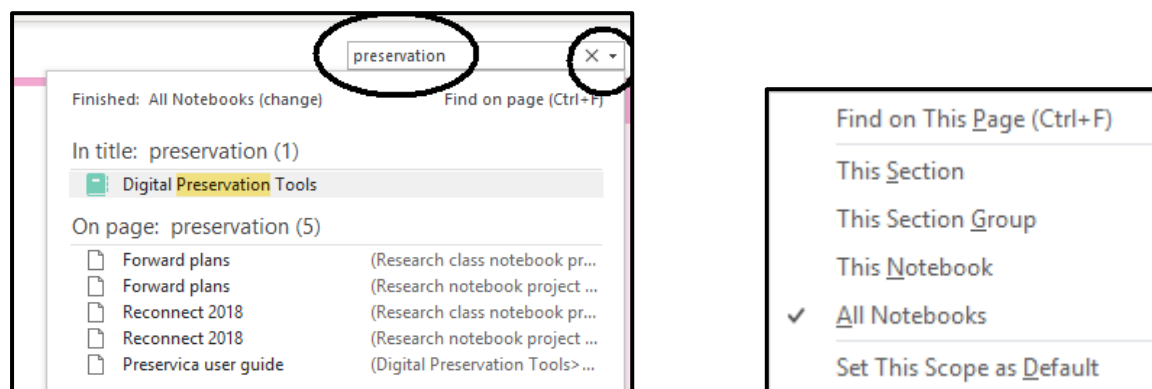
If you have a device on which you can handwrite notes, OneNote can convert these notes into typed text. Write your notes on a OneNote page. Under the Draw toolbar, use the 'Lasso' tool to select the handwritten text. Then press the 'Ink to Text' button to convert it to text.



Text written using mouse and pen tool in OneNote and selected with lasso tool. On right, converted to text, apart from one word, which OneNote could not recognise which can be hand corrected in the typed version.

7.8 Search notebook content and metadata

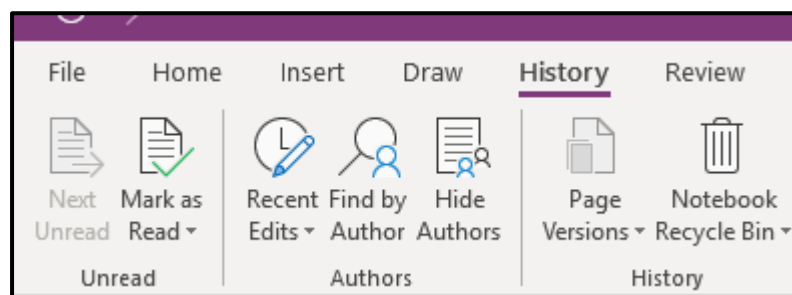
There is a search box next to the notebook title (Online version) or in the top right-hand corner of notebook (Offline version). The offline version offers more comprehensive search options and will search both section/page titles and page contents within a whole notebook for the required search term. Click on the down arrow to the right of the search box to see options to narrow down the scope of the search. It is not possible to sort search results.



Search for word 'preservation' across all notebooks. Options to narrow scope of search.

Search for author

When content is added to a notebook, OneNote logs the author's ID and date content is created. To search for content created by a specific team member in a shared or Class notebook, in OneNote (offline), click on the 'History' tab and then 'Find by Author'.



The search results can be filtered to limit them to one section, and/or sorted by author or date last modified.

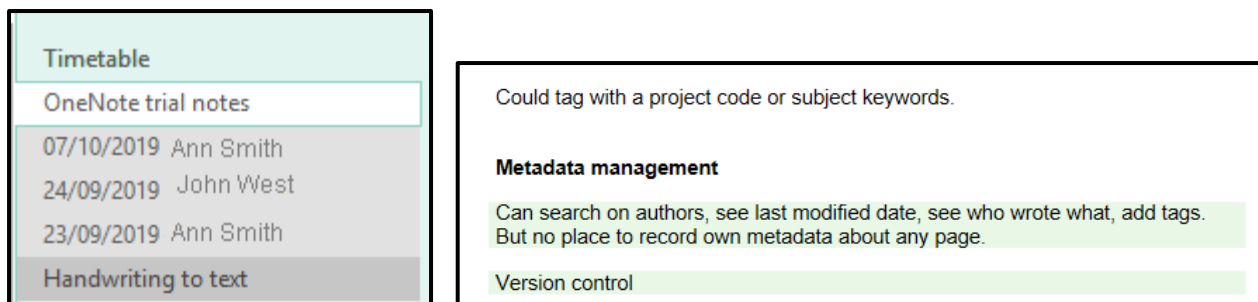
7.9 Review changes and retrieve deleted content

On the 'History' tab, there are buttons to view recently edited content ('Recent Edits' button), view/retrieve earlier versions of a page ('Page Versions' button) and retrieve deleted pages ('Notebook Recycle Bin' button).

Page versions

OneNote saves older versions of pages for up to ten days. A new version is created each time the author changes, or hourly. After two days, OneNote will start to reduce the number of page versions

retained. After ten days, all old versions will be deleted. Open the relevant page in OneNote and click on the 'Page Versions' button. Older versions of the page are listed by date created. When you view a page version, content which was changed/added in that version is highlighted.



The image shows two overlapping screenshots from the OneNote interface. The left screenshot displays a list of page versions for a notebook page titled 'Timetable'. The versions are listed with their creation dates and authors: '07/10/2019 Ann Smith', '24/09/2019 John West', and '23/09/2019 Ann Smith'. The text 'Handwriting to text' is visible at the bottom of the list. The right screenshot shows the 'Metadata management' section, which includes the text 'Could tag with a project code or subject keywords.', 'Can search on authors, see last modified date, see who wrote what, add tags. But no place to record own metadata about any page.', and 'Version control'.

List of previous versions. Text added on 7/10/2019 highlighted on notebook page.

In the global settings, it is possible to turn off the version history (so no older versions will be saved) or version deletion function (all versions will be saved long-term).

Deleted pages and sections

OneNote saves deleted pages and sections for 60 days. Click on History/'Notebook Recycle Bin' to view deleted content and restore it.

8. Collaborative working and sharing notebook content

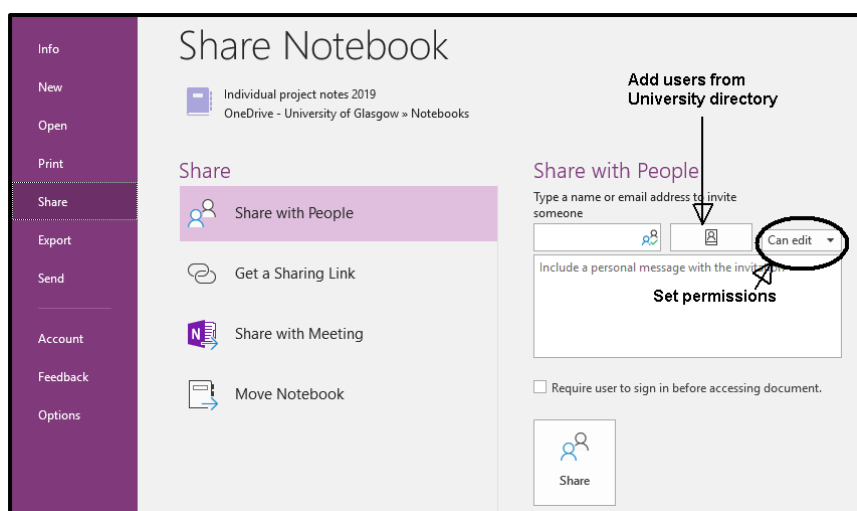
8.1 Share your individual notebook

It is possible to share your individual notebook with other people. These users will have access to the whole notebook – it is not possible to limit access to a page or section.

In OneNote, open the 'File' menu and go to 'Share'.

If the people you want to share your notebook with are part of the University of Glasgow, or their e-mail address is in your e-mail contact list, type the user's name or click on the button to open up the University address book and pick up their details. To share your notebook with people outwith these categories, type in their e-mail address.

Use the option on the right (circled in screenshot) to set permissions to read only or read/ edit notebook.



Add a message if you want and press 'Share'. Invitees will receive an e-mail containing a link to your notebook.

Alternatively, you can use the 'Get a Sharing Link' option to send a link to one or multiple users. You can choose whether they can edit the notebook or only read content.

You can password protect a section of your notebook if you wish to prevent other users from accessing it. Open the notebook in OneNote offline version, right-click on the section and select 'Password protect this section'. Assign a password when prompted.

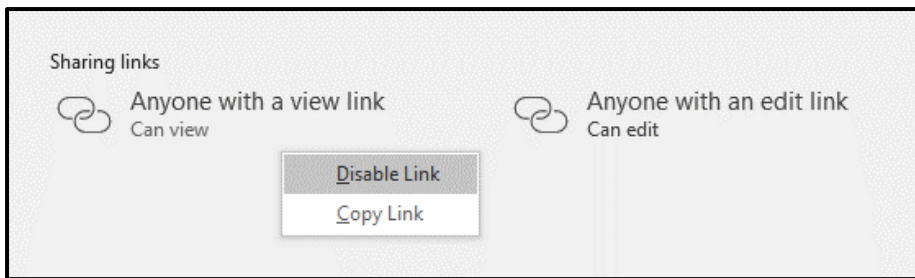
Cancel notebook sharing

You can cancel notebook sharing at any time.

Go to File/Share/'Share with People'. The list of users with whom you have shared your notebook is displayed.

Right click on a user's name and select *Remove user*. You can also edit their access rights e.g. change them from 'Can edit' to 'Can view'.

If you have shared a link, you can disable the link. Right-click on the link (underneath the list of users) and select 'Disable link'. The link which you shared will no longer work.

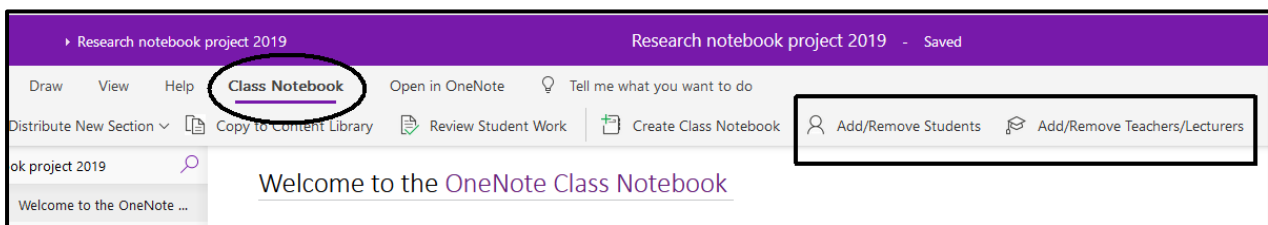


Right-click on one of the Sharing links options to find the Disable Link and Copy Link options

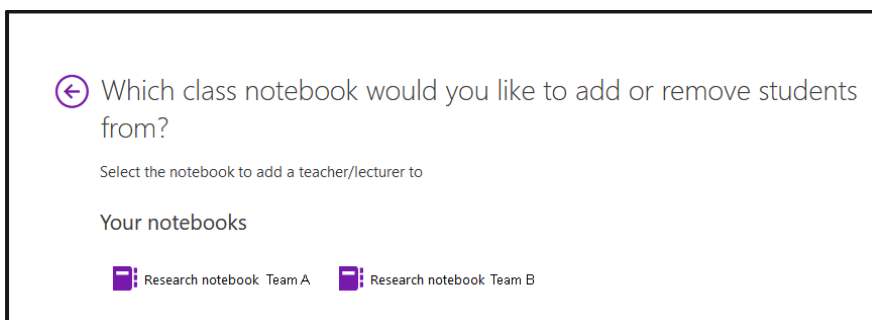
8.2 Add new project leaders or team members to a Class notebook

It is only possible to add new users to a class notebook by using OneNote online.

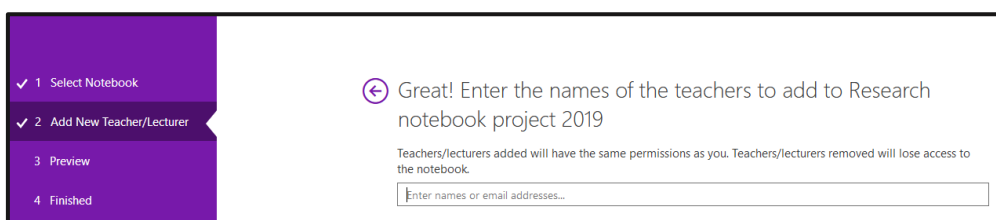
Open your Class notebook in OneNote online. Click on the Class Notebook tab on the ribbon. Options to add or remove students/project team members or tutors/project leaders are displayed. Select an option.



This will take you to the sign-in page on Microsoft's OneNote website. Sign in using your university e-mail address and password and select the correct Class notebook from the list.



This takes you to the 'Add student/team member' or 'Add tutor/project leader' page. Add the names of additional people from the University directory, separating each with a semi-colon. Click 'Next' to complete the process.



9. Export your notebook

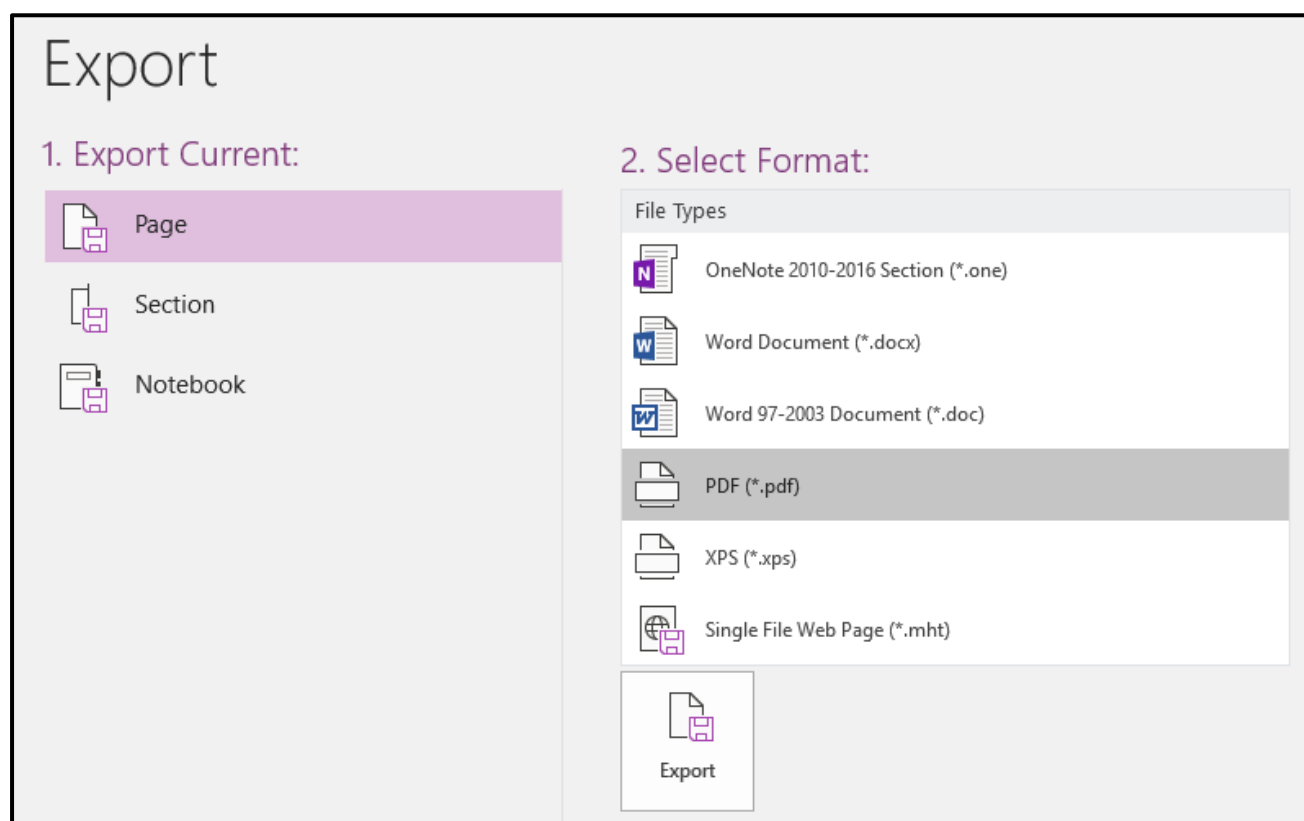
You can export the contents of a page or section, or the whole notebook. This is useful for sharing, re-using or backing up your work.

Open the notebook in OneNote offline version.

If you want to export a page or section, navigate to the correct page or to any page within the section. If you want to export the whole notebook, it does not matter which page you have open.

Go to File/Export.

Select what you want to export - page, section or whole notebook - then the export format you want to use. There are several formats to choose from.



Select your preferred format and click 'Export'. You can then choose where to save the exported file.

There is no Export function in OneNote online, the only export option it offers is to print a single page to pdf.

10. Using OneNote as a research notebook

Below are some suggestions of ways for using and managing a OneNote notebook as a research notebook. For more information about implementing the functions mentioned, see the relevant section in this guide.

10.1 Organise your notebook

A well-organised and labelled notebook will be easier to search and navigate quickly, especially once you have lots of content.

One notebook per project

You may find it preferable to have one notebook per project. This will make it easier to manage access for sharing and collaborating with other team members or external colleagues, or working with your supervisor, team leader or Principal Investigator.

Project documentation

You could reserve a section for project documentation e.g. standard protocols, policies, project plans. The Class notebook is pre-configured with a Content Library section, which is designed as a place for shared resources and documentation.

If your team has a lot of paperwork, you may even want to create a separate notebook for team/project documentation. You can use the **Links function** to insert links to this documentation into any notebook pages, both within the same notebook and across notebooks.

Other sections might relate to different aspects of your work e.g. experiments, publications, teaching.

Create a table of contents, either for your whole notebook or one for each section.

Signposting content

Give each page a **meaningful title**. If you use **identifiers** for your research e.g. project codes, course codes, experiment numbers, add these to each page. Then you will be able to search quickly on this identifier and find all work relating to this topic.

If your work does not involve some form of identification numbers, you could always create your own coding system, if that helps.

Create a Read Me page as a place to document the codes you create, so that you or people you share your notebook with can quickly check what they mean.

You may find it helpful to create **page templates** for recording information or activities which you repeat regularly: this can save time and act as a prompt to document essential information each time. This may be particularly useful in a shared notebook, to ensure everyone follows a standard approach for recording certain information.

Teaching notes
25 November 2019 12:27

Course code:	
Course title:	
Session:	

Topics covered:

Assignments:

Project ABC experiments
25 November 2019 12:24

Experiment number:

Aims:

Method:

Results:

Examples of a couple of custom page templates

Tags are also a good way to track and locate related material. Create your own set of custom tags or modify existing ones to ensure that your tags are relevant.

Project individual test noteb... Managing Data course

Managing Data Week 6 notes
25 November 2019 12:52

Course code:	RT0788
Course title:	Managing Data
Session:	2019-2020
Week:	6

RT0788 course handbook

Topics covered:
Trusted repositories
Online/offline storage

Presentation on certification

Some unanswered questions ...

Slide from **Timbus** project, DPC website

Assignments:
Research requirements, Core Trust Seal repository requirements <https://www.coretrustseal.org/>

Page from a notebook using the Teaching notes template. It contains a link to the course handbook, stored in another section of the notebook, and to a presentation, which is stored on a local server. A slide from another presentation has been dropped in for reference.

10.2 Manage data

Raw data, especially images, video and raw output from laboratory devices will be too large to copy and paste into a notebook and need to be stored elsewhere. It will also be static content which will not be updated if the original file is modified. There are several options:

Insert link: you could link to a file in a file store e.g. OneDrive.

Record location: you could simply document where the file is saved, without inserting an active link.

Create a master table of file locations: keep all of your location information in one place to refer to quickly.

You may want to include some screenshots or low resolution images in your notebook for reference. If you want to annotate these, it is better to do this in another programme and then insert the annotated content. Annotations added in OneNote can become dissociated from the content they relate to if it is moved.

10.3 Back up your notebook

While OneNote content will be backed up routinely as part of IT Services' file management procedures, you may wish to create ongoing back-ups of your notebook by exporting it as a pdf on a regular basis e.g. monthly.

When team members leave the university, their Office 365 account will be closed and their work will become inaccessible to the rest of the team. Therefore, ask departing colleagues to export their notebook(s) as a pdf and save the exported document in a shared location. This will provide remaining team members ongoing access to the information.

11. Further help

NOTE: the Help menu within OneNote is only available in OneNote online, not OneNote offline.

Microsoft resources

Microsoft has various resources online to help with OneNote:

- Searchable online support <https://support.office.com/en-gb/onenote>
- Community forum <https://answers.microsoft.com/en-us>

Online video tutorials for Class notebooks

There is a dedicated website www.onenoteineducation.com with video tutorials to help tutors, project leaders and team members use features in Class notebooks. Some of these video tutorials will also be useful for individual notebook users.

University IT Services

For issues relating to user accounts and access, contact the University's IT Services.

Online resources

There are also blog posts and articles online offering advice about using OneNote as a research notebook. A few of these are listed below.

- Dr Martin Engel, Neuroscientist
[Blog post \(2015\): using OneNote as a research notebook](#)
[Blog post \(2016\): migrating your team to OneNote](#)
- PLOS Computational Biology article (2019): [A quick guide for using Microsoft OneNote as an electronic laboratory notebook](#)
- Brad Underhill, Humanities PhD student: [Using OneNote and Office Lens for Humanities Research](#)
- Gökser Gökçay, Historian: [How I Used OneNote for my PhD](#)