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Migrating to OneNote 2010

from OneNote 2007

In This Guide

Microsoft OneNote 2010 looks very different from OneNote 2007, so we created this guide to help you minimize the learning curve. Read on to learn key parts of the new interface, discover free OneNote 2010 training, find features such as the Templates task pane or the Options dialog box, understand how to exchange notes with people who don't yet have OneNote 2010, and find out how to get access to advanced features.

Quick Access Toolbar

Commands shown here are always visible. You can add your favorite commands to this toolbar.

Ribbon Tabs

Click any tab on the ribbon to display its buttons and commands.

Ribbon Groups

Each ribbon tab contains groups, and each group contains a set of related commands. Here, the **Tags** group contains commands for applying, changing, and searching for note tags.

Backstage View

Click the **File** tab to enter Backstage view, where you can open, create, share, print, and manage your notebooks.

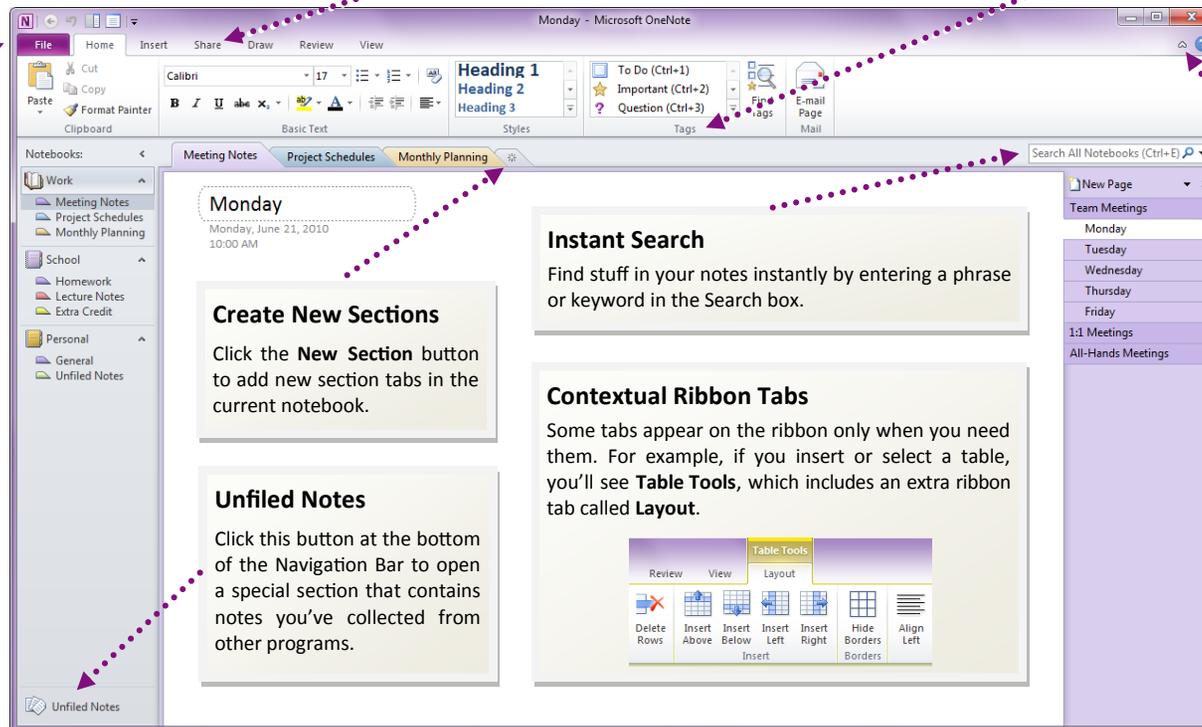


To exit Backstage view, click any ribbon tab.

Show the Ribbon

When you first start OneNote 2010, the ribbon is hidden to maximize your note-taking space.

Click this icon or press CTRL+F1 to show or hide the ribbon at any time.

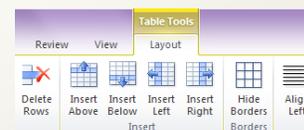


Instant Search

Find stuff in your notes instantly by entering a phrase or keyword in the Search box.

Contextual Ribbon Tabs

Some tabs appear on the ribbon only when you need them. For example, if you insert or select a table, you'll see **Table Tools**, which includes an extra ribbon tab called **Layout**.



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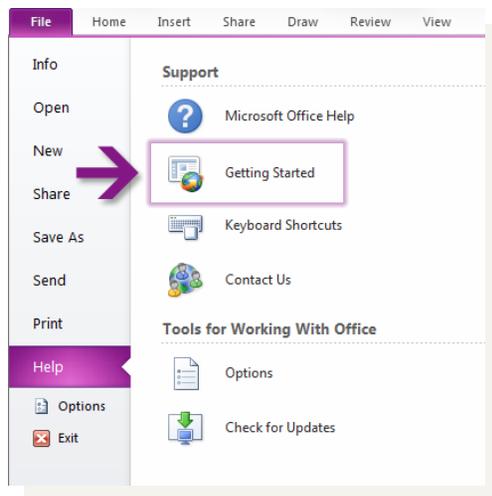
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How to get started with OneNote 2010

If you've been using Microsoft OneNote for a long time, you'll no doubt have questions about where to find OneNote 2007 commands and toolbar buttons in OneNote 2010.

We have many free resources available to help you learn OneNote 2010, including training courses and menu-to-ribbon guides. To find these materials, click the **File** tab in the main program window, and then click **Help**. Then, under **Support**, click **Getting Started**.

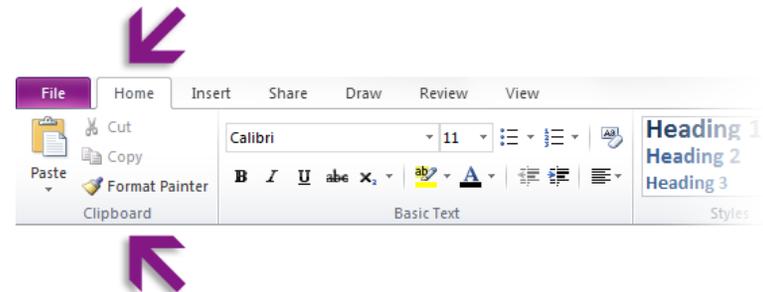


On the Web page that opens, click the links to the items that interest you. In particular, the interactive menu-to-ribbon guide is a real timesaver. When you click any OneNote 2007 command, it shows you exactly where that command is located in OneNote 2010.

Where are my menus and toolbars?

In OneNote 2010, a wide band spans the top of the main program window. This is the ribbon, and it replaces the old menus and toolbars. Each tab on the ribbon has different buttons and commands that are organized into ribbon groups.

When you open OneNote 2010, the ribbon's **Home** tab is displayed. This tab contains many of the most frequently used commands in OneNote. For example, the first thing you'll see on the left side of the tab is the **Clipboard** group, with the commands to **Paste**, **Cut**, and **Copy**, as well as the **Format Painter**.



In the **Basic Text** group next to it, you'll find commands to make text bold or italic, followed by the **Styles** group with the commands to quickly apply text formatting to headings and body text.

The ribbon adjusts its appearance to fit your computer's screen size and resolution. On smaller screens, some ribbon groups may display only their group name, not their commands. In that case, simply click the small arrow on the group button to reveal the commands.

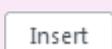
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Things you might be looking for

Look over the table below to find some of the common and familiar things that you might be looking for in OneNote 2010. Although this list isn't comprehensive, it's a good place to start. To find the full list of OneNote 2010 commands, click the **File** tab, click **Help**, and then click **Getting Started**.

To...	Click...	And then look in the...
Open, create, share, convert, export, send, or print notes		Backstage view (click the links on the left side in this view)
Apply formatting to text or apply and find note tags		Basic Text, Styles, and Tags groups
Insert tables, pictures, links, files, audio and video, or equations		Tables, Images, Links, Files, Recording, and Symbols groups
Send a page in e-mail, share new or existing notebooks		E-mail and Shared Notebook groups
Draw or erase sketches, handwriting, or shapes, customize pens, create writing space on a page, rotate objects, or convert ink to text		Tools, Insert Shapes, Edit, and Convert groups
Check spelling, do research, translate text, or take linked notes		Spelling, Language, and Notes groups
Maximize screen space, show or hide rule lines and page titles, set page and margin size, zoom the page, or create new side notes		Views, Page Setup, Zoom, and Window groups

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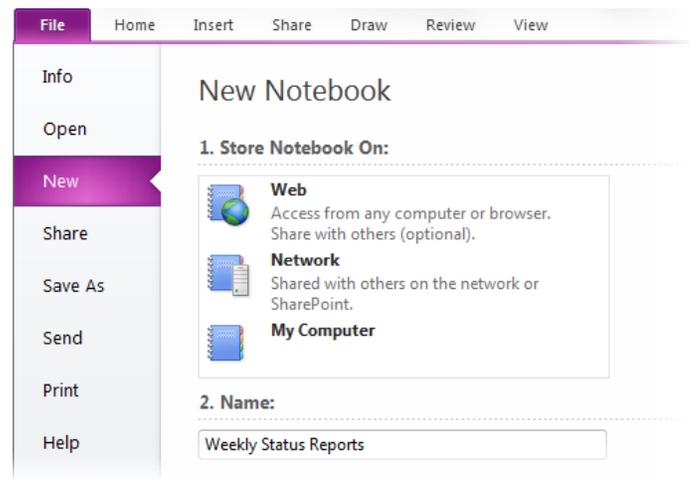
from OneNote 2007

Where is the New Notebook Wizard?

In OneNote, you can work with more than just one notebook at a time. In OneNote 2010, the New Notebook Wizard from OneNote 2007 has been replaced with a simple interface that is located in Backstage view.

To begin, click **File** to open Backstage view, and then click **New**.

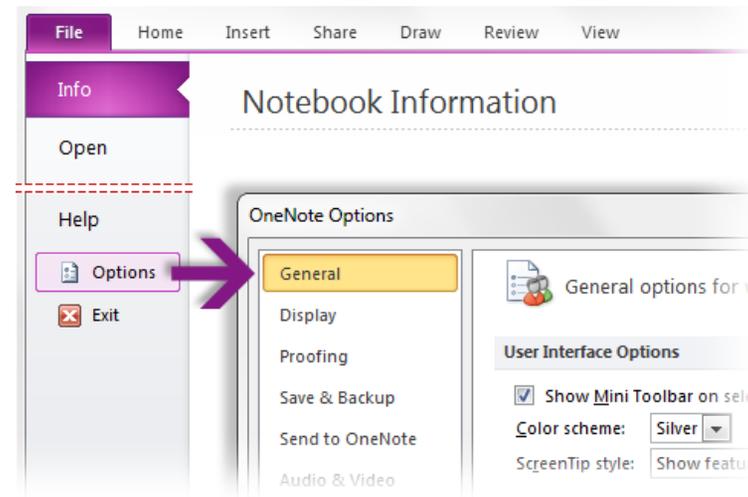
First, select where you want to store your new notebook, and then enter a descriptive name (for example, “Weekly Status Reports” or “Monday Night Study Group”). Choosing a meaningful notebook name is especially important if you’ll be sharing your new notebook with other people. Next, select or verify where in the selected location the new notebook should be stored, and then click **Create Notebook**.



What happened to Tools | Options?

Looking for the OneNote program settings that let you control things like where to display page tabs, whether note containers are displayed, where OneNote should save backups, or how passwords are applied?

Click the **File** tab, and then click **Options**. This opens the **OneNote Options** dialog box, where you can customize your OneNote settings and preferences.



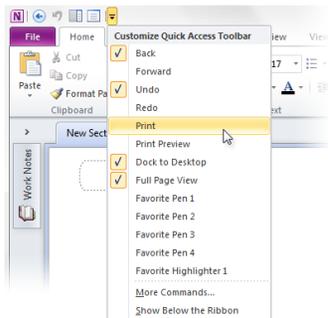
Some settings in the **OneNote Options** dialog box apply only to OneNote. Other preferences (for example, the color scheme) will apply to all other Microsoft Office 2010 programs that you have installed.

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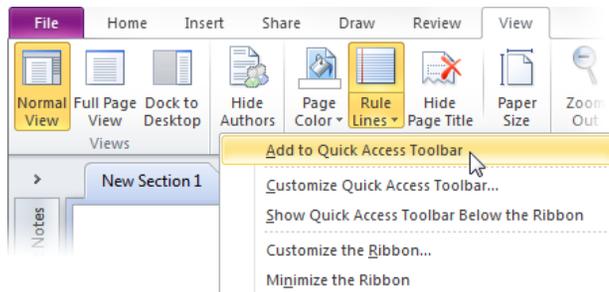
Keep your favorite commands nearby



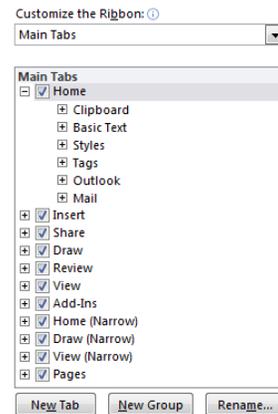
The Quick Access Toolbar in the upper-left corner of the OneNote program window provides shortcuts to the commands you'll use often.

By adding buttons to this toolbar, you can keep your favorite commands visible and available at all times, even when you switch ribbon tabs.

Click the drop-down arrow next to the Quick Access Toolbar to turn on or off any of the commands listed on the shortcut menu. If the command you want to add isn't shown in the list, switch to the ribbon tab where the button appears and then right-click it there. On the shortcut menu that appears, click **Add to Quick Access Toolbar**.



Create ribbon tabs or groups of your own



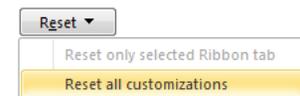
You can customize ribbon commands by putting buttons into ribbon groups where you want them to appear, or by creating custom ribbon tabs of your own.

Right-click any ribbon group and then click **Customize the Ribbon**. In the **OneNote Options** dialog box, you can add commands to your own tabs or groups.

Not all older OneNote commands appear on the ribbon, but they're still available. If you can't live without some of these, simply add them to the ribbon or to the Quick Access Toolbar.

In the **OneNote Options** dialog box, in the **Choose commands from** list, select **Commands Not in the Ribbon**. Next, find the command that you want and add it to a custom ribbon tab or group.

If you make a mistake, don't panic. You can use the **Reset** button if you want to go back to the default ("factory") settings.



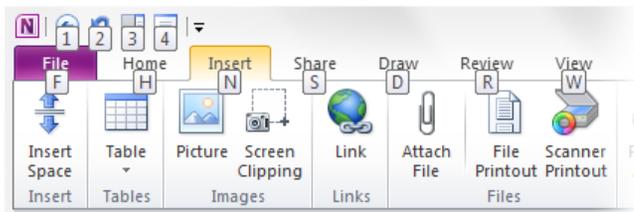
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Introducing KeyTips

OneNote 2010 provides shortcuts for the ribbon, called KeyTips, so you can quickly perform tasks without using your mouse.



To make KeyTips appear on the ribbon, press the ALT key.

Next, to switch to a tab on the ribbon using your keyboard, press the key of the letter displayed under that tab. In the example shown above, you would press N to open the **Insert** tab, S to open the **Share** tab, D to open the **Draw** tab, and so on.

Once you've switched to a ribbon tab in this way, all available KeyTips for that tab appear on the screen. You can then finish the sequence by pressing the final key for the command you want to use.

To go back one level while in a sequence, press the ESC key. Doing so multiple times in a row cancels KeyTips mode.

Many OneNote 2007 keyboard shortcuts are still available in OneNote 2010. For example, CTRL+F still activates the Search box, and ALT+SHIFT+RIGHT ARROW still indents the selected text to the right.

For a list of OneNote 2010 keyboard shortcuts, press F1 while in OneNote and then search for "keyboard shortcuts" in OneNote Help.

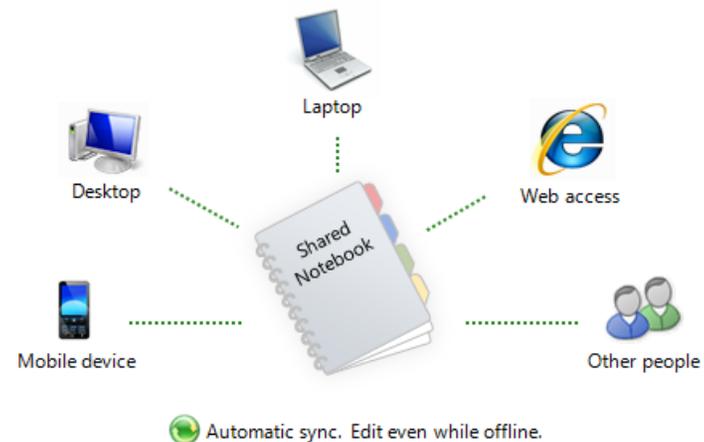
What happened to Live Sharing Sessions?

The Live Sharing Session feature that was introduced in OneNote 2007 has been discontinued in favor of the many new features and improvements to shared notebooks in OneNote 2010.

Whereas Live Sharing Sessions required you to deal with IP addresses, temporary passwords, and specific note-taking times, OneNote 2010 lets you share and use your notebooks more easily and from virtually anywhere — even from a standard Web browser.

For shared notebooks, OneNote 2010 introduces the ability to edit shared notes offline and sync later, highlight unread notes, show author information, search by author, display and manage a version history of pages, and use a Recycle Bin for recovering deleted notes.

To begin using these features, click the **Share** tab on the ribbon.



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How to work with people who don't yet have OneNote 2010

OneNote 2010 notebooks use a new file format for storing information. If people you work with are using different versions of OneNote, don't worry — you can still open and edit older notebooks in OneNote 2010, and share your files with people who don't yet have OneNote 2010.

In OneNote 2010...	What happens?	What should I do?
You open a notebook that was created with OneNote 2007.	<p>In the OneNote 2010 program window, you'll see the words [Compatibility Mode] on the title bar.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;">Meeting Notes [Compatibility Mode] - Microsoft OneNote</div> <p>This tells you that even though you're in OneNote 2010, you're still technically working in the earlier file format, and that you won't be able to use new OneNote 2010 features like math equations, linked notes, multi-level subpages, versioning, and the Recycle Bin until you convert the file to the OneNote 2010 file format.</p>	<p>To exit Compatibility Mode and convert the 2007 file to the new OneNote 2010 format, click the File tab, and then click Info. Click the Settings button for the notebook you want to convert, and then click Properties. In the Notebook Properties dialog box that opens, click the Convert to 2010 button.</p> <p>Before you convert an old notebook, ask yourself if you'll still need to collaborate with people who still use OneNote 2007, or if the notebook is already shared with others. If the answer is yes, you may want to continue working in Compatibility Mode.</p>
You create a new notebook in the new OneNote 2010 format or you convert an old notebook to the new OneNote 2010 format.	<p>If someone uses the OneNote 2007 program to open a notebook that is saved in the new OneNote 2010 format, an error message will tell them that the notebook was created with a newer version of OneNote. They will not be able to view or edit the notebook.</p>	<p>You can either convert the notebook to the older OneNote 2007 format before sending or sharing your notebook, or you can recommend to your collaborators to upgrade to OneNote 2010.</p> <p>If your collaborators are unable to upgrade to OneNote 2010 for any reason, they can download a free trial version of OneNote 2010. This lets them edit OneNote 2010 notebooks for a limited time and view all OneNote files indefinitely. Trial versions of all Office 2010 programs are available on Office.com.</p>
You save your document as a OneNote 2007 file.	<p>If someone uses OneNote 2007 to open a notebook that was saved in the OneNote 2007 format using the OneNote 2010 program, the notebook will open normally — no further conversion will be required.</p>	<p>You don't have to do anything, necessarily.</p> <p>However, if you keep working in the older OneNote 2007 format, keep in mind that new OneNote 2010 features like math equations, linked notes, multi-level subpages, versioning, and the Recycle Bin will be unavailable.</p>