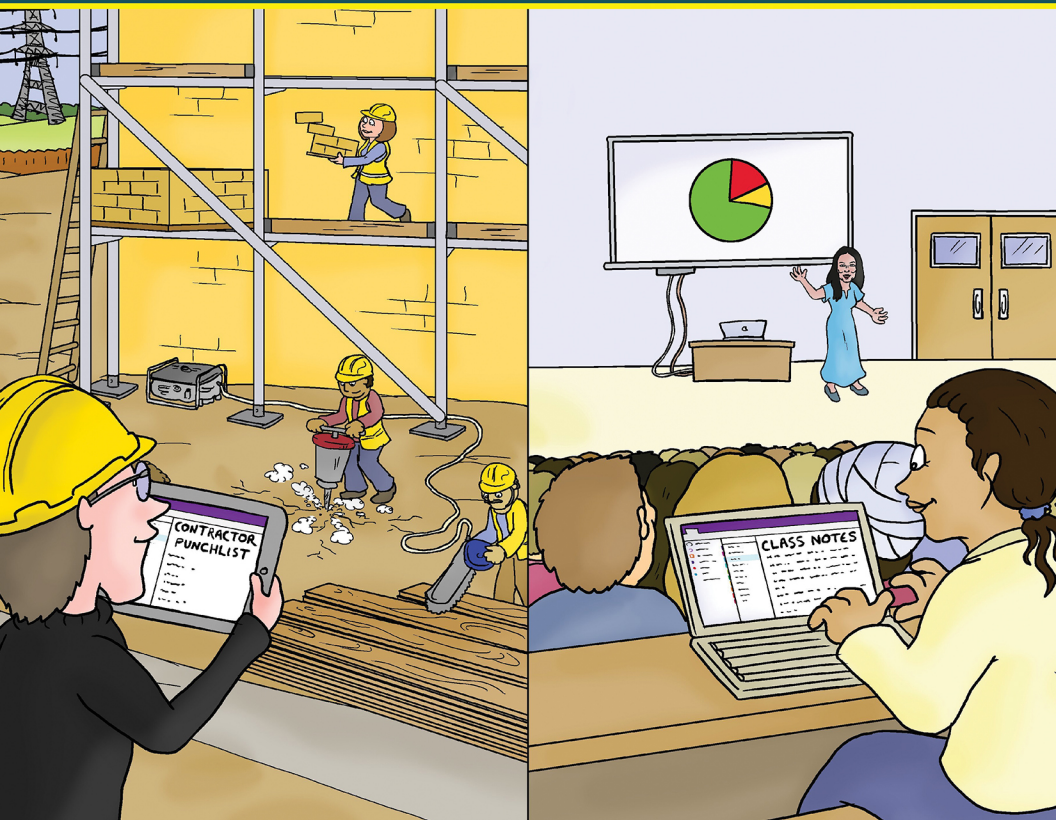




ConversationalGeek®

Conversational OneNote for Life Moments

By Heather Severino (Microsoft MVP – Office Apps and Services, Microsoft Certified Trainer)



**In this
book, you
will learn:**

- How OneNote can be used to take notes for every aspect of your personal life
- Scenario-based usage examples to demonstrate all that OneNote offers



Sponsored by








OneNote

Your digital notebook

Your World, organized

Get organized in notebooks you can divide into sections and pages. With easy navigation and search, you'll always find your notes right where you left them.

The screenshot shows a OneNote page titled 'SADDLE INVENTORY'. It contains a table with columns: PRODUCT, NAME / SKU / PRICE, QTY, and SUPPLIER. The table lists three items: 'CONTIGO V Series Leather', 'Proseuro Road Leather', and 'LITWAKE Yellow Leather'. Handwritten annotations include: 'TOP RECOMMENDATION' with an arrow pointing to the first item, 'Please order more!' with an arrow pointing to the 'QTY' column, and 'Look for new supplier' with an arrow pointing to the 'SUPPLIER' column for the second item.

PRODUCT	NAME / SKU / PRICE	QTY	SUPPLIER
	CONTIGO V Series Leather SKU No. 123 456 \$ 12.99	50	Continco 954 E11 1st Ave. Seattle, WA 206-491-7841
	Proseuro Road Leather SKU No. 123 457 \$ 27.99	1	Proseuro 1000 1st St. Berkeley, CA 947-456-7891
	LITWAKE Yellow Leather SKU No. 123 458 \$ 34.99	20	Litwack, Inc. 2000 Jerry Todd Dr. Anchorage, AK

Gather your thoughts...

Quickly capture important information and ideas through images, videos, audio recordings, as well as ink and voice.

...then make them even better

Revise your notes with typed or handwritten text, and highlight and annotate what's important. With OneNote on all your devices, you'll never miss a flash of inspiration.

Share and collaborate

Great minds don't always think alike, but they can share ideas and create together in OneNote.



Microsoft

For more information, visit
www.microsoft.com/onenote

Conversational OneNote for Life Moments

by Heather Severino

© 2020 Conversational Geek



ConversationalGeek®

Conversational OneNote for Life Moments

Published by Conversational Geek® Inc.

www.conversationalgeek.com

All rights reserved. No part of this book shall be reproduced, stored in a retrieval system, or transmitted by any means, electronic, mechanical, photocopying, recording, or otherwise, without written permission from the publisher. No patent liability is assumed with respect to the use of the information contained herein. Although every precaution has been taken in the preparation of this book, the publisher and author assume no responsibility for errors or omissions. Nor is any liability assumed for damages resulting from the use of the information contained herein.

Trademarks

Conversational Geek, the Conversational Geek logo and J. the Geek are trademarks of Conversational Geek®. All terms mentioned in this book that are known to be trademarks or service marks have been appropriately capitalized. We cannot attest to the accuracy of this information. Use of a term in this book should not be regarded as affecting the validity of any trademark or service mark.

Warning and Disclaimer

Every effort has been made to make this book as complete and as accurate as possible, but no warranty or fitness is implied. The information provided is on an “as is” basis. The author and the publisher shall have neither liability nor responsibility to any person or entity with respect to any loss or damages arising from the information contained in this book or programs accompanying it.

Additional Information

For general information on our other products and services, or how to create a custom Conversational Geek book for your business or organization, please visit our website at ConversationalGeek.com

Publisher Acknowledgments

All of the folks responsible for the creation of this book:

Author:	Heather Severino
Project and Copy Editor:	Pete Roythorne
Content Contributors:	Vee Paliwal
	Tricia Van Hollebeke
	Tony He
	Ayubu Audu
	Michael C. Oldenburg
	Amy Huang

The “Conversational” Method

We have two objectives when we create a “Conversational” book. First, to make sure it’s written in a conversational tone so that it’s fun and easy to read. Second, to make sure you, the reader, can immediately take what you read and include it into your own conversations (personal or business-focused) with confidence.

“Geek in the Mirror” Boxes

We infuse humor and insight into our books through both cartoons and light banter from the author. When you see one of these boxes it’s the author stepping outside the dialog to speak directly to you. It might be an anecdote; it might be a personal experience.



Within these boxes I can share just about anything on the subject at hand Read 'em!

Life Moment Notes



“The wedding was amazing! How did you plan all this?”

You know that saying “Life comes at you fast”? Well, it really does! How do you keep track of all these life moments heading your way? Do you:

- Keep a paper journal for your day-to-day life goals, activities, tasks, and thoughts?
- Keep an Excel workbook for tracking the health of parents, children, or yourself?

- Create an inspiration board for a special event, such as a wedding or a baby shower?
- Create a folder system on your device to store your home improvement project files – estimates, invoices, permits, fixtures, paint samples, flooring photos, etc.?

You may have said yes to many of these, no to some, or have your own ideas in addition to the ones above.

This book covers many examples of tracking life moments in a OneNote notebook. As you peruse the following pages and think about notetaking for various life moments, I suggest you keep two questions in mind:

1. How can you apply these notetaking techniques and workflows to your life?
2. Is there a different life moment you can apply these notetaking techniques and workflows to?

Journal-style notetaking

How you setup a notebook for journaling – for example, by a timeline or a specific area of your life – depends on what you are journaling about. If you're already journaling on paper, you should also consider how you transition the paper (analog) format to a OneNote notebook page (digital) format.

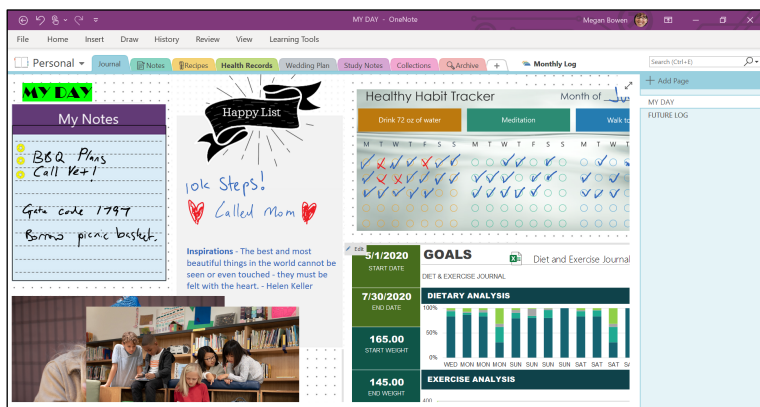


Figure 1: A daily journal filled with handwritten and typed notes

Imagine you are setting up a log to track what you've done, are currently doing, and what needs to be done in the future.

Creating a simple table on a notebook page can provide structure for a daily, weekly, or monthly log.

This log can be in a list format, which may include the date, activity type (reading, painting, training, volunteering at animal shelter, public speaking, organization chapter meeting, etc.) as well as special notes about the activities. You can tag each of these entries by categories, such as goals, work, home, family, budget, volunteering, etc. Tags are also a great way to track what has been done or still needs to be done. The To Do tag or assigning things as Outlook tasks, are great ways to track these activities through to completion.

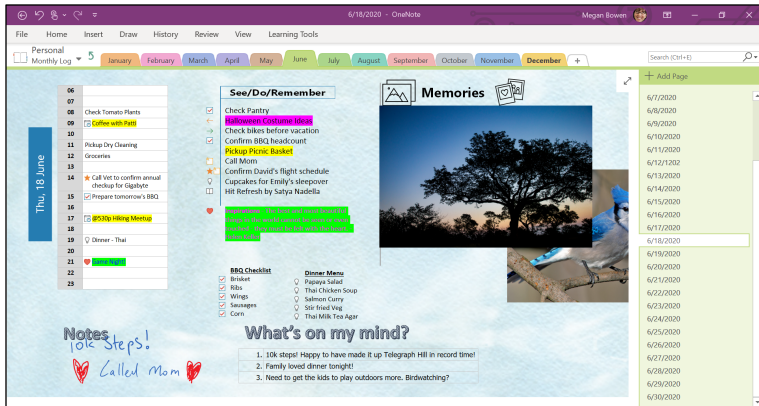


Figure 2: A daily log page filled with notes

If you need other ways to identify the status of an activity, you can consider setting up custom tags for things like on-hold, deferred, cancelled, moved to next month, etc.

The premise behind this kind of tagging is that you can find journal activities by the tags assigned to them. You may want to find how many days you read books last month by using the custom tag Reading, or how many hours you volunteered at the animal shelter by using a custom tag called Volunteering.

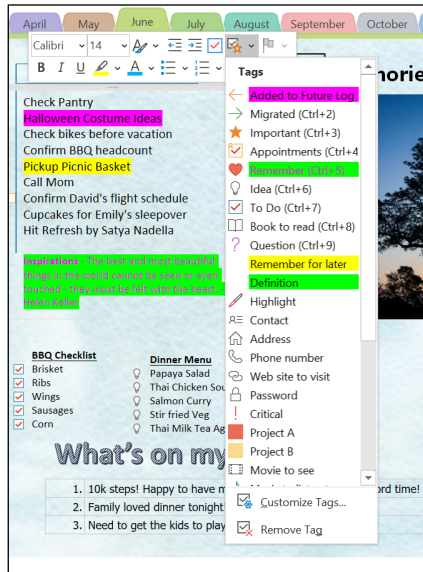


Figure 3: The Tags menu with custom tags setup and applied to note containers on a notebook page



Watch this video to learn how to create a custom tag.

<https://aka.ms/CustomTag>



For all sorts of life moment notebooks (journals) I like to setup an index page. From the index page, all journal pages can be created, given a name, and linked at once with this keyboard shortcut: Type two open square brackets, then type the name for the page, and type two close brackets, for example, `[[Wellness]]`.

While caring for the health of parents, children, or yourself, a Wellness journal can help you track exercise, nutrition, medications, and more.

Say you are caring for an aging parent and need to track their day-to-day health and medications. Creating a notebook section called Parent Health keeps all these notes together, while providing a way for all your other life moments (in other sections) to be available in a central notebook.

While out to lunch you dispense medications to your parent, and then log it with the OneNote mobile app.

Later that day, after a walk around the lake with your parent, you can take a screenshot of exercise activity from your mobile device health app and send it to the Parent Health section of the notebook (via the OneNote mobile app).

Another popular way to track exercise and nutrition is to insert an Excel worksheet into a notebook page and setup table columns to log the details. By doing this you have data analysis and visualization capabilities, such as sorting and filtering activities by date, or creating a chart to show the progression of weight loss, healthy eating habits, and hydration.



Watch this video to learn how to insert a file printout.

<https://aka.ms/InsertPrintout>

The next day your parent's doctor calls informing you of a medication dosage change. You note this in the Today's Medications journal page. When you go to the next medical appointment for your parent, you can pull up these notes from

the OneNote mobile app on your tablet and discuss concerns with the doctor, reference notes to answer the doctor's questions, and jot down notes and advice from the doctor.

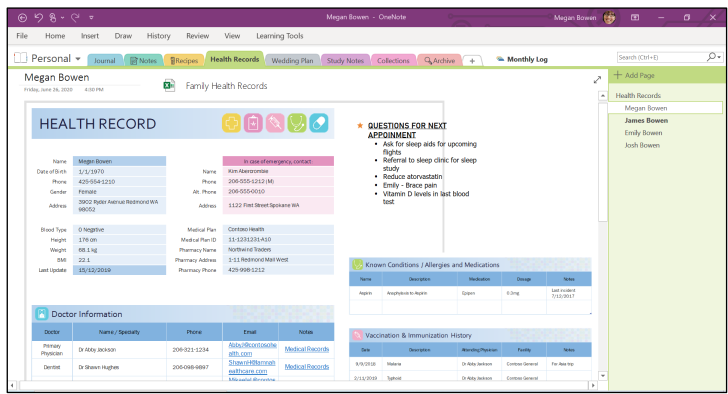


Figure 4: A notebook page filled with family health notes

If you are attending school, a OneNote school journal can help you keep track of class notes, assignments, quiz/test dates, and a class schedule. There are pre-built page templates you can use to get started, such as the Detailed Lecture Notes page template shown in the screenshot below.

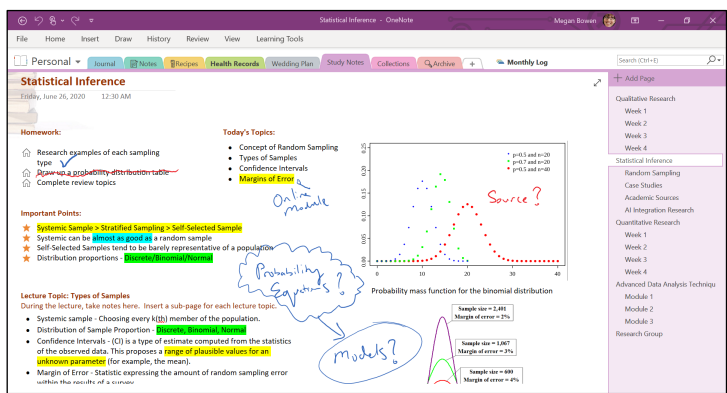


Figure 5: The Detailed Lecture notes template filled with typed and digitally handwritten notes

You'll likely need to customize a page template a bit more for the type of notes you'll be capturing during class or in a study group. You can customize the page background, existing note containers or add new note containers. Then save these in Page templates for future use.

If you have a lot of class team exercises or a study group, consider setting up a shared cloud notebook (in OneDrive) that you and your fellow classmates can take notes in. If your school permits, you can record audio for a class session, or snap a few photos of a whiteboard and send it to a notebook.



For more team/shared notebook tips check out the Conversational OneNote for Team Collaboration ebook at <https://aka.ms/ONCollaboration>

Here are some other ways you can use a notebook to help you take school notes:

- Insert a draft PowerPoint presentation and copy edit with digital ink.

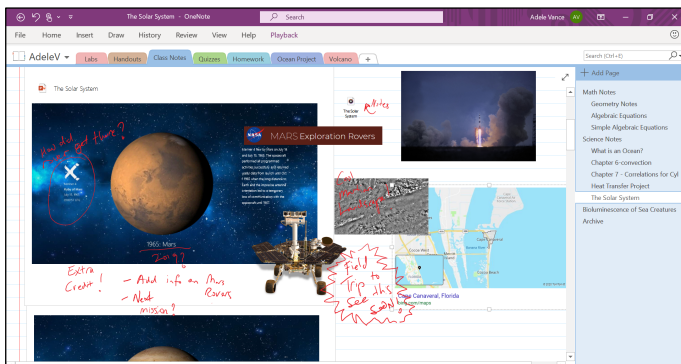


Figure 6: A PowerPoint presentation inserted as a printout on a notebook page

- Insert webpage screenshots as report references.
When you do this it automatically places the website hyperlink below the screenshot on the notebook page.
- Insert common mathematical equations into a page with the Insert equation feature.

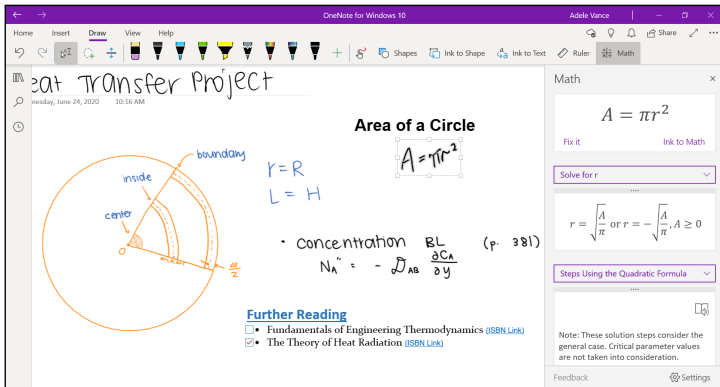


Figure 7: The OneNote for Windows 10 Math feature

- Convert handwritten expressions to text with the Ink to Math feature.



Watch this video to learn how to handwrite expressions and turn them into Math text.

<https://aka.ms/InkToMath>

- Enable the Immersive Reader feature to make reading on a device easier. This allows students to listen to the paragraphs of a page being read to them. They can also enable words to display syllables, highlight parts of

speech, change text size and color, and change line focus. Immersive Reader supports readers regardless of age or ability, and certain features, like text spacing, can be helpful for students with dyslexia or dysgraphia.

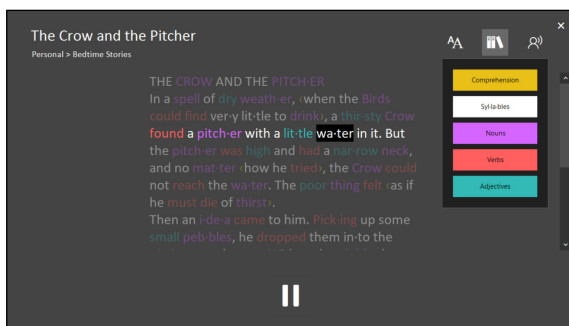


Figure 8: The Immersive Reader feature in action



Watch this video to learn how to use Immersive Reader with a notebook page.

<https://aka.ms/ImmersiveReaderVideo>

- Handwrite notes on a ruled or grid page.

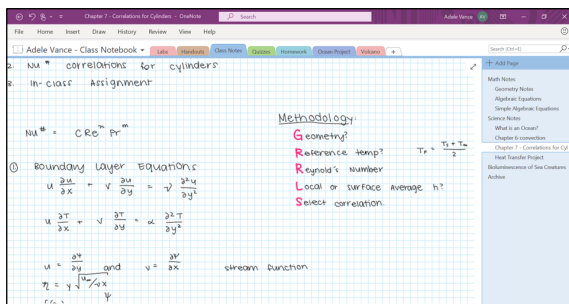


Figure 9: A notebook page with gridlines and handwritten school notes



If you are a student or teacher that works with OneNote for Web or OneNote for Windows 10, sparkly ink is a big hit!

Someone on the OneNote product team was visiting a school to learn how students use digital ink. He asked the class “if digital ink could do anything, what would you want it to do?” One girl replied, “I think it would be cool if the ink looked like a rainbow.” Her classmates roared with excitement.

He took the idea back to the Engineering team, and Ink Effects became a reality. The effects include Rainbow, Silver, Gold, Lava, Ocean, and Galaxy (made from real samples of the Hubble space telescope imagery).

The OneNote team later received a thank you letter from a teacher. She explained that she re-wrote her content with Ink Effects. After sharing the newly inked content with students, she noticed it was the first time in 10 years that they were paying attention.



If you are not journaling by a timeline, about wellness, or school, what other life moments can you journal about with the techniques and workflows covered in this chapter?

Special Event Moments – Wedding Planning

Say you recently got engaged and need to stay organized while planning your dream wedding.

You can plan just about every wedding detail in OneNote. I speak from experience here, because I did just that not too long ago. Here's how you can do it:

Create a cloud notebook in OneDrive, this way you can share it with your fiancé, a wedding planner, family members, or friends that are helping with the planning.

Next create sections, such as Attire, Invitations, Venue, Ceremony, Reception, Food and Beverage, Cake, Photographer, Hair/Makeup, Officiant, Flowers, Registry, Honeymoon, and any others that are of importance.

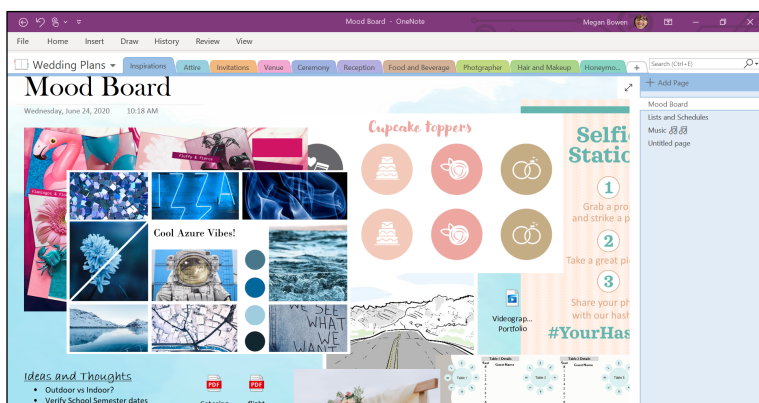


Figure 10: A Mood Board notebook page

Within each section you can capture ideas and notes.

In the Attire section you can grab a screenshot from a dress or suit designers' website and insert this into a page. Then you can add a few notes around the screenshot, things like color

choices you like, estimated time to ship, and local boutiques that carry this design.

While attending a bridal show you can snap a few photos of floral arrangements, table settings, and cakes that you like, with the assistance of the camera roll and the OneNote mobile app, you can then add these to the Flowers, Reception, and Cake sections as inspirational ideas.



Watch this video to learn how notes taken on one device are synced in a cloud notebook and available on other devices.

<https://aka.ms/SyncScreens>

Once you get back home you can use digital ink to sketch changes for the flower arrangements – such as leaving out Baby’s Breath and adding tropical orchids – or suggest things like switching the table linen colors to watercolors.



If you’re a fan of visual inspiration boards, you can create your own in a notebook. With a web page open that has a wedding idea you like, use the OneNote screen clipping feature to take a snapshot of the idea and add it to a notebook page.

You can insert an Excel worksheet into the DJ section and start adding potential first dance songs, a playlist, and rankings for each song. You can then share the notebook with your fiancé so you can figure out the song list together. Your fiancé adds their songs and ranks them too. Now you can sort the ranked songs and make your selections.

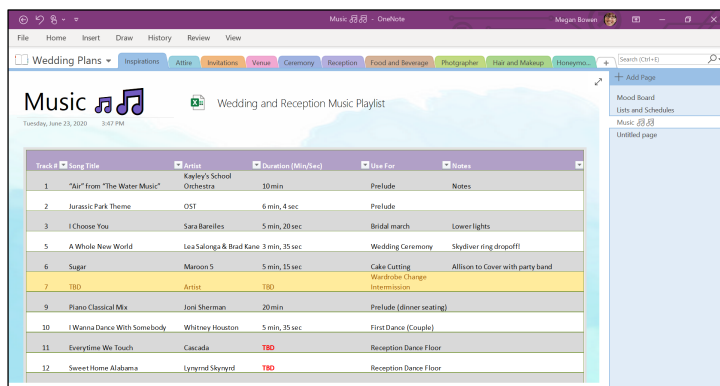


Figure 11: An Excel spreadsheet inserted in a notebook page

As you sign contracts with each vendor, you can insert these documents into their respective sections of the notebook.



Seating chart tip: Use Visio or PowerPoint to build your seating chart with shapes. You can insert this file to your notebook for your planning purposes and you can send it to your reception venue contact for their use during setup.



You can also diagram a table seating chart directly on a notebook page with shapes.

Watch this video to learn how to draw a seating chart with digital ink that gets converted to symmetrical shapes.

<https://aka.ms/InkToShapeVideo>

As it gets closer to your wedding date, you'll want to go to the venue for a property walkthrough and taste testing. Say you know the venue is going through a lot of interior and exterior renovations. You can have questions lined up about this in the Venue section of your notebook. From your tablet sticky note in the OneNote mobile app, you can ask the banquet event manager your questions, and jot down the answers.



Watch this video to learn how to sync sticky notes.

<https://aka.ms/StickyNotesVideo>



While touring the venue, food or cake tasting, and picking out table linen and décor, the Dictate feature in the OneNote mobile app can help you capture notes. As you say your thoughts into the device microphone they are transcribed into written text on the page.

Sometimes it's easier to walk and talk, than walk and type! 😊

When you get to the taste testing, you can snap photos of your selections directly from the OneNote mobile app, and then add notes to what you want modified for each dish photo.

A couple of weeks out from the wedding is a good time to create a checklist of all the things you need to take care of in the final days, as well as what you need to remember to bring with you on the day. Trust me, I still forgot a few things, even with a detailed list.



This notetaking experience as well as many other life notetaking experiences has set a precedent in our household. Whenever a new adventure or project comes about, I hear from my husband, “Let me guess, you are going to create a OneNote notebook for this?!?”

My latest reply, “Why yes I am, and if not a notebook, maybe a new section in an existing notebook!”

You may not be planning a wedding but think of the many other special life moments you may plan for, such as a baby shower, school graduation party, parent’s anniversary party, a family vacation, a start-up business grand opening, or a housewarming party.

Speaking of houses...

Home Improvement Project Planning

Imagine you just purchased a new home and want to tackle a home renovation project while staying within budget.

You can start by creating a notebook, preferably a cloud notebook in OneDrive so that you can share this with your partner, builder, interior designer, family, or friends.

Then you can create sections for specific parts of the project planning and build out. For example, Drawings, Contracts, Permits, Budget, Flooring, Furniture, Fixtures, and Punch List.

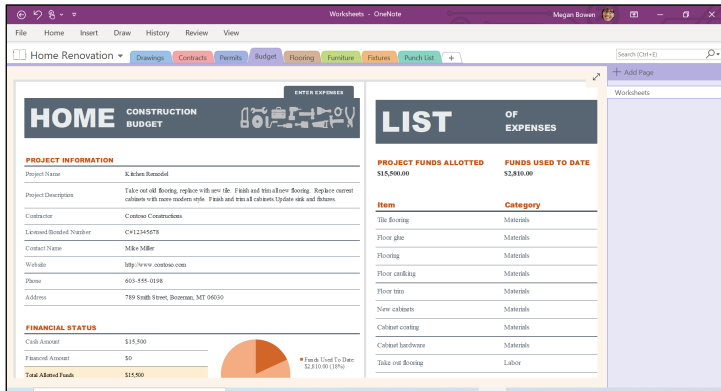


Figure 12: A notebook page with a home construction budget and list of expenses

Your residential designer emails a floor plan drawing that has been plotted as a PDF. You can insert this into the Drawings section, and then mark-up/sketch changes with digital ink.

If you have shared the notebook with your designer, they can view your sketches and make additional changes.



If you have Microsoft Visio, you can create a diagram of your kitchen floor plan with the Maps and Floor Plans shapes and stencils.

You can then insert the Visio diagram into a notebook page and update it directly from the page.

As estimates come in from the residential designer, engineer, and builder, you can send these emailed estimates to the pages of the Budget section and keep track of the costs within an Excel workbook that is also part of the Budget section.

With the OneNote mobile app you can take photos of fixtures, appliances, and doors at a home show, and then insert these into the associated notebook section pages.



Figure 13: A screenshot of the OneNote mobile app displaying a notebook page of home lighting and bath fixtures with digital ink notes

The following day, you can send an email to your builder letting them know to check out the preferred items you found at the home show. They can then add notes indicating which ones they can provide, and for those they can't provide they can add photos and details of similar products on the same page.



I've managed small home renovation projects in a OneNote Notebook. But it's also a great place to create a honey-do list... ahem, notebook.

I often heard, "I don't know which things are top priority for you?" or "what do you want to replace that kitchen faucet with?"

How did I answer this question? A prioritized and organized notebook!

Create sections such as Kitchen, Bathroom, or Patio, and then list the work to be done as a ranked to-do list, you can include web links to things like a sink fixture or landscaping design.

As your home renovations are wrapping up you can create a construction punch list page. This could include the location area, repair needed, and a photo documenting the issue. As each issue is resolved the builder marks it as complete and notes the work done. You can then verify each item has been done to your satisfaction and close out the renovation project.

Task Description	Assigned To	Completion Date	Inspection Date	Notes
Replace kitchen cabinet drawer slides	AshW	8/16	8/17	COMPLETED
Replace cabinet hardware	JoanW	8/16	8/17	COMPLETED
Install video download unit	MayaD	8/16	8/5	Test day and night video, verify secondary climate selection.
Touch up paint in guest bedroom and garage	PatR	8/26	8/5	Color codes (SW 7008, 7090 9023)
Install hanging shelves in garage	NicholasR	8/3	8/9	Test lead bearing weight

Task Description	Assigned To	Completion Date	Inspection Date	Notes
Run auxiliary power line to front door for video download	ChristieK	8/12	8/17	COMPLETED
Add electrical outlet to guest bedroom (labeled B1)	ChristieK	8/12	8/17	COMPLETED
Add weather shielded outlet to carport (labeled C1-2)	ChristieK	8/4	8/9	COMPLETED

Figure 14: A notebook page with construction punch list tables

Whether your home project is big or small, you can manage it all by taking notes in OneNote.

The Big Takeaways

In a world where people can (and do) work from anywhere, Microsoft OneNote is a feature-rich notetaking solution that helps you capture, organize, and access notes from anywhere. Through a variety of different apps (desktop, online, or mobile) you can jot down notes, share ideas, capture meeting action items, and access notes more effectively.

We know that Microsoft will continue to build more connective tissue between all the services in OneNote and other connected Microsoft 365 apps and services. We're excited to see what comes next.

To download the OneNote application, visit:

<https://www.onenote.com/download>

We want to hear about your notetaking in OneNote. Tell us about your experience online or get your questions answered in the Microsoft Tech Community at:

<https://aka.ms/ONTechCommunity>

You can also use these Microsoft resources to start or enhance your notetaking journey with OneNote:

Get started with OneNote help & learning:

<https://aka.ms/MicrosoftOneNote>

To learn more about capturing and organizing ideas with Microsoft OneNote, follow @msonenote on Twitter.

Submit, upvote and track progress for OneNote feature suggestions on the OneNote UserVoice page:

<https://onenote.uservoice.com>

Want to find out more about how OneNote can help you in different settings? Check out the other ebooks in this series:

Conversational OneNote Essentials

<https://aka.ms/ONEssentials>

Conversational OneNote for Meeting Notes

<https://aka.ms/ONMeetingNotes>

Conversational OneNote for Collaboration

<https://aka.ms/ONCollaboration>

Quickly become conversational about using Microsoft OneNote.

The art of note taking has evolved. Today's meetings, journals, and brainstorming sessions require an ability to easily create, categorize, store, retrieve, and share notes. In this ebook, you'll learn about OneNote and how it can be used to completely transform your note taking.



About Heather Severino

Heather Severino is a Microsoft MVP, Microsoft Certified Trainer (MCT), and owner of TeachUTech, specializing in Microsoft Office, presentation and instructional skills training, instructional design, and authored training videos.



ConversationalGeek®

For more books on topics geeks love visit

conversationalgeek.com