Microsoft OneNote Training

OVERVIEW

The **Microsoft OneNote Training** course is designed to help participants capture, organise, manage and share information more effectively using OneNote.

The course explores how to structure notebooks, sections and pages; capture and format different types of information; find information quickly; and use OneNote for meeting notes, projects and other shared information.

Participants will also explore how OneNote works within Microsoft 365, including integration with Outlook and Teams, sharing and collaboration, and newer capabilities such as Loop components and Copilot.

Emphasis is placed on practical ways to structure and manage information so that notebooks remain organised, easy to navigate and useful over time.

LEARNING OUTCOMES

By the end of the course, participants will be able to:

- Understand how OneNote can be used to capture, organise and manage information
- Create and structure notebooks using sections, section groups, pages and subpages
- Capture and format text, images, files, links and other information
- Create reusable structures and templates for consistent note-taking
- Use tags and search tools to organise and locate information
- Create clear, well-presented pages using formatting, drawing and page features
- Use OneNote for meeting notes and integrate information from Outlook and Microsoft Teams
- Share notebooks and understand the considerations around access and permissions
- Collaborate effectively with others using shared notebooks
- Explore how Loop components and Copilot can extend the way information is captured and used
- Apply practical approaches to organising and maintaining notebooks

These outcomes help participants develop more organised, consistent and practical ways to capture, manage and share information using OneNote.

PREREQUISITES

Participants should have basic computer skills and be comfortable working in a Microsoft Windows environment. No previous experience with Microsoft OneNote is required.

Microsoft OneNote Training

DURATION & DELIVERY

The duration of this course is typically **3–4 hours or 1 day**, depending on the level of depth and practical exercises included.

This course can be delivered in a range of formats to suit your team:

- **Onsite training** - delivered at your workplace
- **Live online training** - delivered virtually in real time
- **Hybrid delivery** - a combination of onsite and online participants for teams working across multiple locations

All training is delivered by experienced Microsoft 365 specialists with a focus on practical, real-world application.

COURSEWARE

Learning materials are available for purchase at the time of booking. These may include training materials, reference guides or supporting resources, depending on the course.

Some of the courseware provided is based on the 2016 edition of Microsoft OneNote. While the version number may appear older, the core concepts and functionality covered in the materials remain relevant to current versions of OneNote.

Where version differences exist - such as interface updates, new capabilities, or enhanced features - our trainers will point these out during the session and incorporate them into the training. This ensures participants always learn the most current, applicable and practical information for the version your organisation uses.

We do hope to update the courseware in the future.

Microsoft OneNote Training

COURSE DETAIL

Getting Started with OneNote
- Understanding OneNote and how it can be used
- Navigating the OneNote interface
- Opening and working with notebooks
- Understanding notebooks, sections and pages
- Working with OneNote across Microsoft 365

Structuring & Organising Notebooks
- Creating notebooks, sections and pages
- Creating section groups and subpages
- Renaming, moving and copying information
- Designing an effective notebook structure
- Creating consistent structures for recurring information
- Practical approaches to organising multiple notebooks

Capturing Information
- Entering and formatting notes
- Working with note containers
- Creating lists and outlines
- Inserting pictures and screen captures
- Adding files, links and other content
- Working with tables

Formatting & Presenting Notes
- Formatting text and page content
- Using styles, lists and tables
- Working with drawing and ink tools
- Using page colours, rule lines and backgrounds
- Creating clear, consistent and professional-looking notes

Tags, Search & Finding Information
- Using built-in tags
- Creating and applying custom tags
- Finding tagged information
- Searching pages, sections and notebooks
- Finding information across larger notebooks

Templates & Reusable Structures
- Understanding templates
- Creating reusable page layouts
- Creating custom templates
- Designing structures for recurring meetings and information
- Supporting consistent note-taking across a team

OneNote for Meetings
- Capturing and organising meeting notes
- Bringing Outlook meeting information into OneNote
- Structuring notes for regular and ad hoc meetings
- Managing actions and follow-up information
- Sharing and distributing meeting information

Sharing, Collaboration & Security
- Understanding shared notebooks
- Sharing notebooks and working collaboratively
- Understanding access and permissions
- Viewing changes and page versions
- Password-protecting sections
- Considerations when working with confidential or sensitive information
- Printing and exporting information for different audiences

OneNote in Microsoft Teams
- Using OneNote alongside Microsoft Teams
- Adding and accessing OneNote notebooks within Teams channels
- Using OneNote as a shared team knowledge base and collaborative workspace
- Approaches to organising team and meeting information

(Cont…)

COURSE DETAIL (Cont..)

Modern OneNote & Microsoft 365 Features

- Working with Loop components
- Exploring Copilot capabilities in OneNote
- Summarising and working with existing notes using Copilot
- Introducing Microsoft 365 Copilot Notebooks
- Exploring how newer Microsoft 365 capabilities can complement traditional OneNote notebooks

Practical OneNote Best Practices

- Naming conventions and consistency
- Keeping notebooks manageable over time
- Avoiding duplication and unnecessary complexity
- Deciding what belongs in OneNote
- Developing practical approaches for team use