


A Quick Start Guide to Field Documentation using Microsoft OneNote: Part 2 (desktop)

Features:

- Microsoft OneNote also has a stand-alone version, where you can do more detailed editing of the notes you created with the mobile version
- With the OneNote desktop version you can
 - edit, add, re-arrange the pictures, audio, and text you collected with the mobile version
 - share and collaborate with colleagues
 - export the collected media to other applications (pdf, PowerPoint, Word, etc.)
- **All of the above are automatically synchronized with the mobile version**

Some things to think about before you begin:

- Because OneNote works on multiple devices and platforms it will look slightly different on each device; however, it will always have the same basic functionality (discussed below)
- As with any pictures, audio, or videos, you need to think about how much storage space you have available on your computer
- The collaboration features rely on synchronizing with Microsoft OneDrive, which is a type of 'cloud' storage 
- Signing up for Microsoft OneDrive account happens automatically when you sign up for a free Microsoft account, and you get about 5GB storage for free (which is enough to get started)
- **This guide will cover what OneNote looks like on Mac computer, but it looks almost identical on a PC running Windows**

Checklist for this workshop:

1. A Windows or Mac computer
2. OneNote installed and functioning **logged into the same Microsoft OneDrive account your mobile device is using!**
3. Access to the internet for synchronization - **but this is not necessary when editing!**

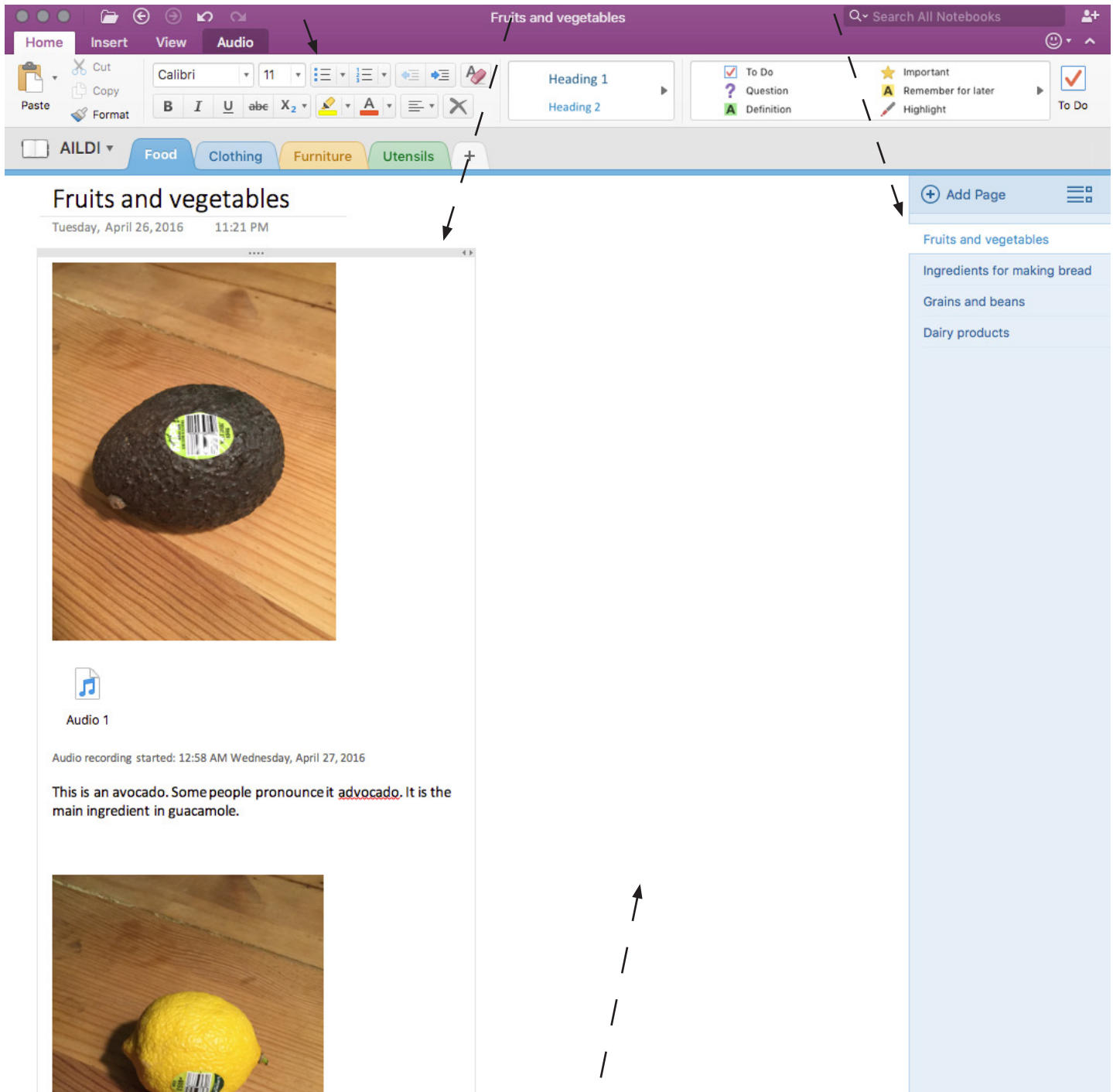
1. Finding your way around OneNote on the desktop

- Open the OneNote application on your computer: the first time you do this you will be asked to log into the Microsoft account you created
- Open the Notebook you created, and it will load the last synchronized version from the last time you used your mobile device to collect data; using my AILDI demonstration, it will look something like this (colours may vary)...

You have a range of basic editing options, similar to a word processor

There is a 'frame' around the content you added

In some desktop versions the pages are on the left-hand side of the screen



All of this white area - which we will call the 'workspace' - can be used to add other things!

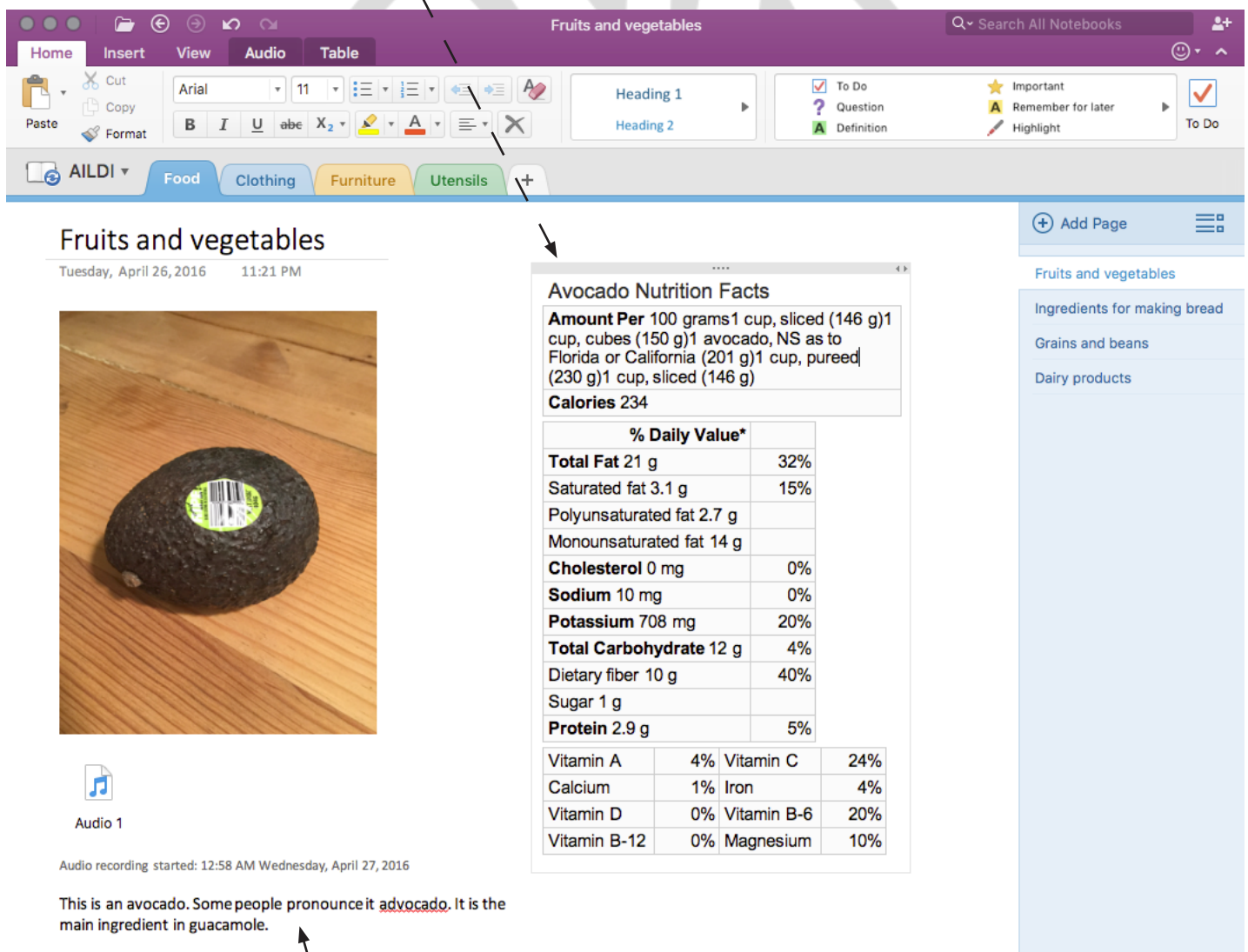
Basic editing

- Although similar to a word processor (like Word), OneNote uses the principle of 'object manipulation': any content is inside a 'frame' which can be resized and placed anywhere in the workspace however you like
- Objects inside the frame, like the text, photos you took or the audio icon, can also be moved inside of a frame or put into its own frame

Example 1: Workflow for adding the nutritional information for the avocado

We will start with adding the nutritional information for the avocado

1. Research the nutritional information (i.e. Wikipedia)
2. Copy this information from your web browser (highlight and copy, as usual)
3. Click on the workspace to the right of the photo (we can always move it later); you will see the cursor sitting exactly where you clicked
4. Paste the text you copied: you will see (a fairly faithfully formatted version of) the content inserted into its own frame



The screenshot shows the OneNote interface with the following elements:

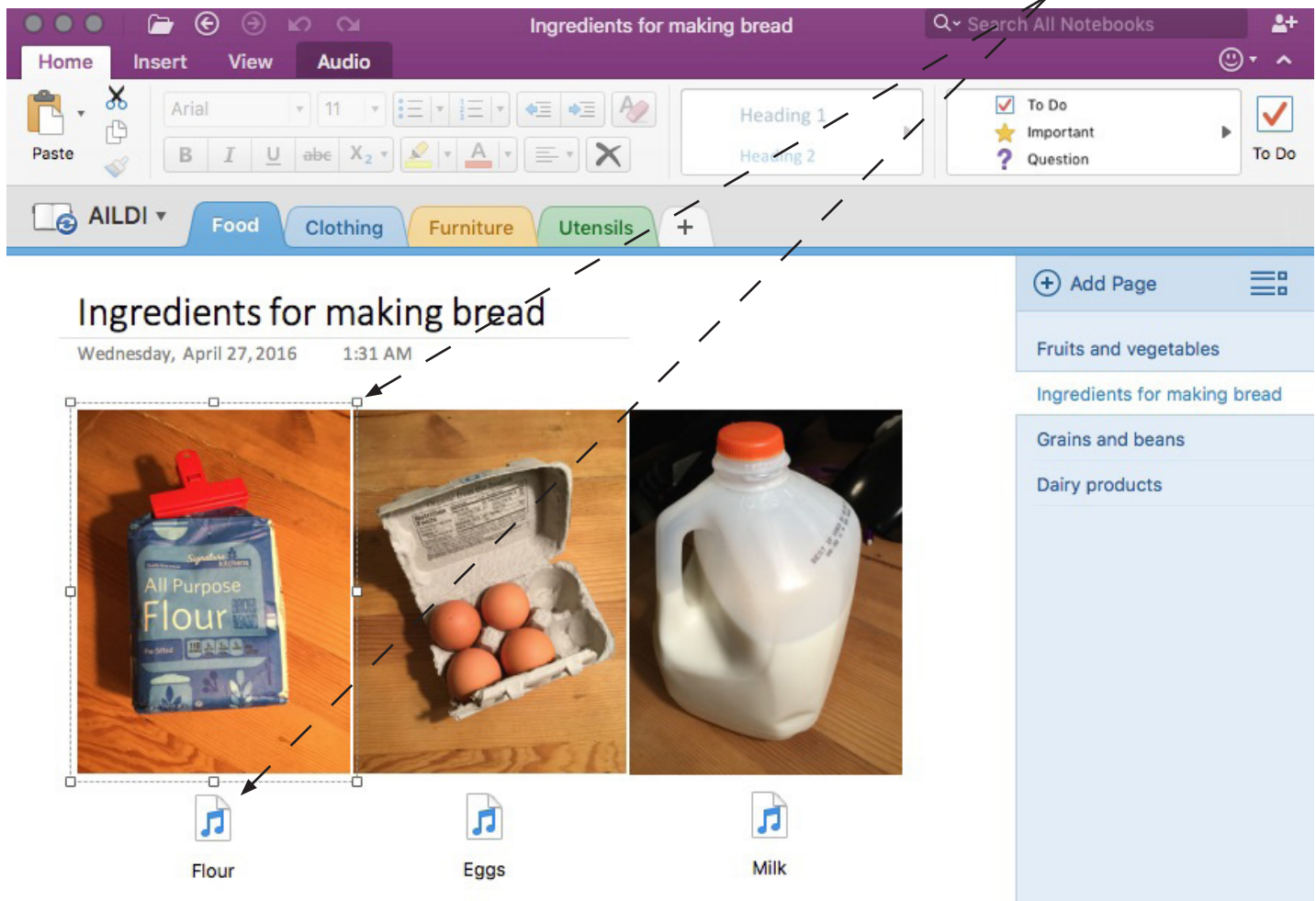
- Ribbon:** Home, Insert, View, Audio, Table. The Home tab is active, showing options for Cut, Copy, Paste, Format, Bold (B), Italic (I), Underline (U), and text color (A).
- Workspace:**
 - Title: Fruits and vegetables
 - Date/Time: Tuesday, April 26, 2016 11:21 PM
 - Photo: A photograph of an avocado on a wooden surface.
 - Audio: An audio recording icon labeled "Audio 1" with a timestamp: "Audio recording started: 12:58 AM Wednesday, April 27, 2016".
 - Text: "This is an avocado. Some people pronounce it advocado. It is the main ingredient in guacamole." (Note: "advocado" is underlined in red in the original image).
- Inserted Content:** A separate window titled "Avocado Nutrition Facts" is shown, containing the following table:

Amount Per		100 grams	1 cup, sliced (146 g)
		1 cup, cubes (150 g)	1 avocado, NS as to Florida or California (201 g)
		1 cup, pureed (230 g)	1 cup, sliced (146 g)
Calories		234	
% Daily Value*			
Total Fat	21 g	32%	
Saturated fat	3.1 g	15%	
Polyunsaturated fat	2.7 g		
Monounsaturated fat	14 g		
Cholesterol	0 mg	0%	
Sodium	10 mg	0%	
Potassium	708 mg	20%	
Total Carbohydrate	12 g	4%	
Dietary fiber	10 g	40%	
Sugar	1 g		
Protein	2.9 g	5%	
Vitamin A	4%	Vitamin C	24%
Calcium	1%	Iron	4%
Vitamin D	0%	Vitamin B-6	20%
Vitamin B-12	0%	Magnesium	10%

The text you added when you were collecting data can also be edited by simply double clicking on the text!

Example 2: Workflow for moving/resizing objects

- Let's say I've collected the ingredients for making bread under the 'Ingredients for making bread' page in the Food section
- If you followed the workflow for collecting information (picture, audio, text, etc.) on you mobile, you'll notice these media aren't arranged very well for the purposes of presenting
- All of the pictures, audio, texts, etc. on the page are actually objects that you can freely move around (this sometimes takes getting used to): click on the objects to move and resize them



Some other things to do and watch out for:

- The 'frames' can sometimes be picky: you actually have to move the objects out of the frame they were originally placed in in order to move them around freely (they can't overlap within the same frame)
- The audio icons can be re-named and placed wherever you like: right-click on the icon and choose a more suitable name
- Text always has to be in a frame, but these frames can also be moved and resized: simply doubleclick on the position where you want to place text
- The space on a page is (theoretically) limitless: but try and keep within an area that is roughly the size of a standard page; this is so you can convert it more easily to a pdf and print it out
- I have decided that I want to add a recipe for simple white bread (which I copied from the internet) and an audio recording of the instructions on how to make it; it could look something like this...

Click on the 'Audio' tab to access the player controls

The screenshot shows the Microsoft OneNote interface. At the top, the 'Audio' tab is selected in the ribbon, and an arrow points to it with the instruction 'Click on the 'Audio' tab to access the player controls'. Below the ribbon is an audio player with controls for 'STANDING BY', 'Status', 'Level', 'Record', 'Stop', 'Play', 'Pause', a volume slider, and a timer showing '00:00'. There are also buttons for 'Back 15 Seconds', 'Forward 15 Seconds', and 'Add Bookmark'. Below the audio player is a navigation bar with tabs for 'Food', 'Clothing', 'Furniture', and 'Utensils'. The main content area displays a recipe for 'Ingredients for making bread' with a list of ingredients: 2 (.25 ounce) packages active dry yeast, 3 tablespoons white sugar, 3 tablespoons lard, softened, 1 tablespoon salt, 6 1/2 cups bread flour, and 2 1/2 cups warm water (110 degrees F/45 degrees C). There is an advertisement for 'Great Value: Pure Cane Sugar, 20 Oz' and a button to 'Add all ingredients to list'. Below the ingredients is a 'Directions' section with a play button icon and a box labeled 'Recipe instructions'. An arrow points from a text box to this icon with the instruction: 'If you have a microphone on your computer you can record additional audio and insert the icon on the page wherever you like'. The 'Directions' section includes a table for 'Prep 20 m', 'Cook 30 m', and 'Ready In 2 h 30 m', followed by three numbered steps: 1. In a large bowl, dissolve yeast and sugar in warm water. Stir in lard, salt and two cups of the flour. Stir in the remaining flour, 1/2 cup at a time, beating well after each addition. When the dough has pulled together, turn it out onto a lightly floured surface and knead until smooth and elastic, about 8 minutes. 2. Lightly oil a large bowl, place the dough in the bowl and turn to coat with oil. Cover with a damp cloth and let rise in a warm place until doubled in volume, about 1 hour. 3. Deflate the dough and turn it out onto a lightly floured surface. Divide the dough into two equal pieces and form into loaves. Place the loaves into two lightly

Synchronizing, sharing and exporting notes

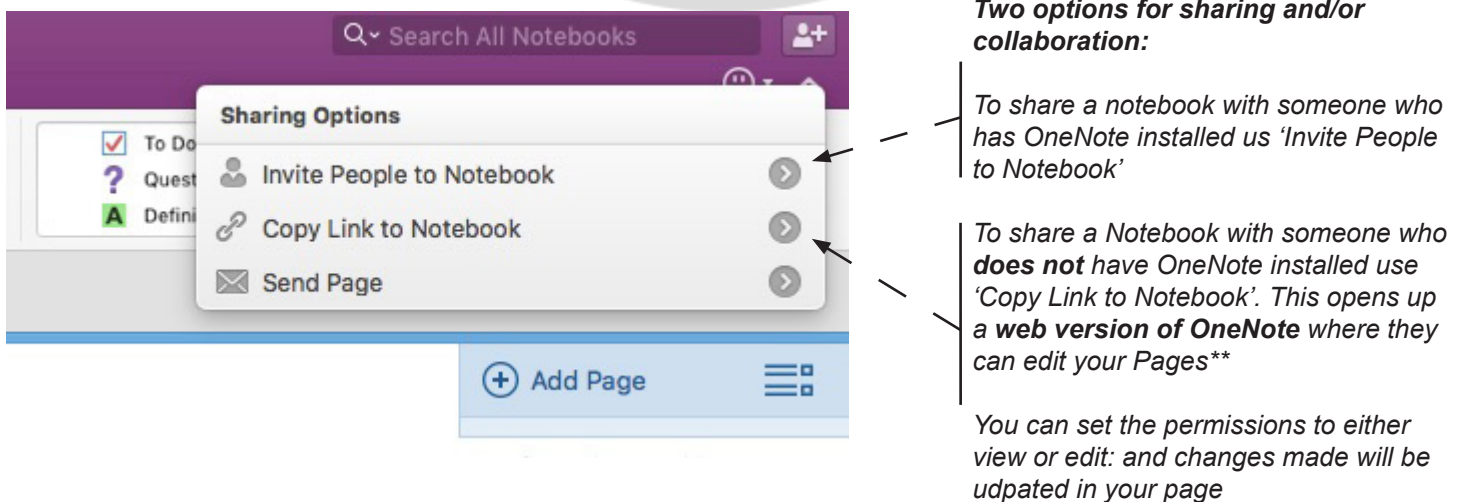
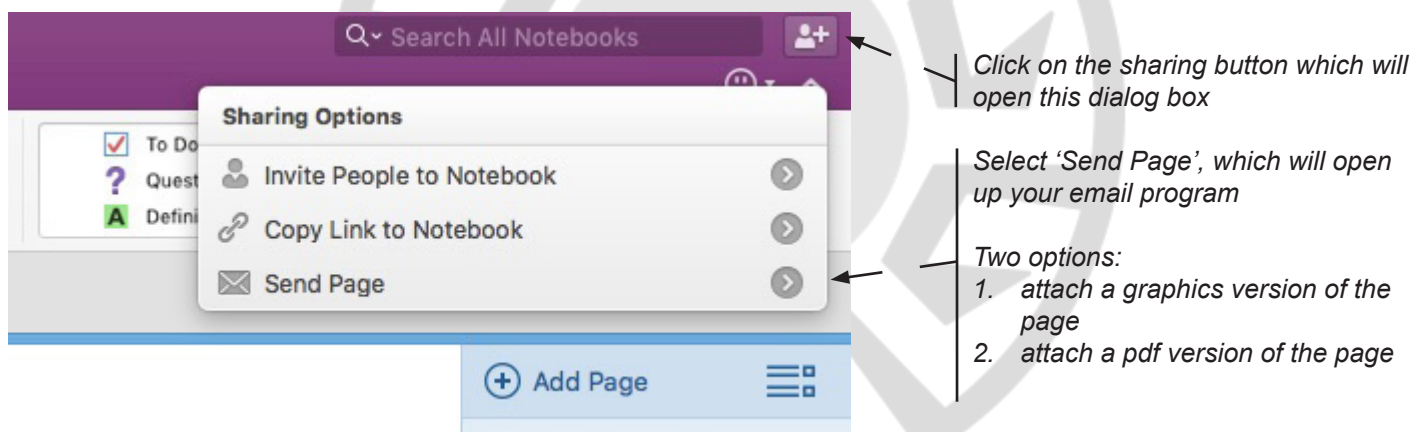
- There are a number of options for sharing and exporting which are pretty much identical in function to the mobile versions of OneNote
- The basic export function will email a pdf version of the active page you are working on; this is convenient but somewhat limited as the audio recording/file is not exported (as pdf typically don't contain audio files), but it's convenient for simple sharing of pictures and text
- As with creating notes on your mobile version, **all of your notebooks will synchronize automatically** with the mobile version: **including all of the edits you made with the desktop version**

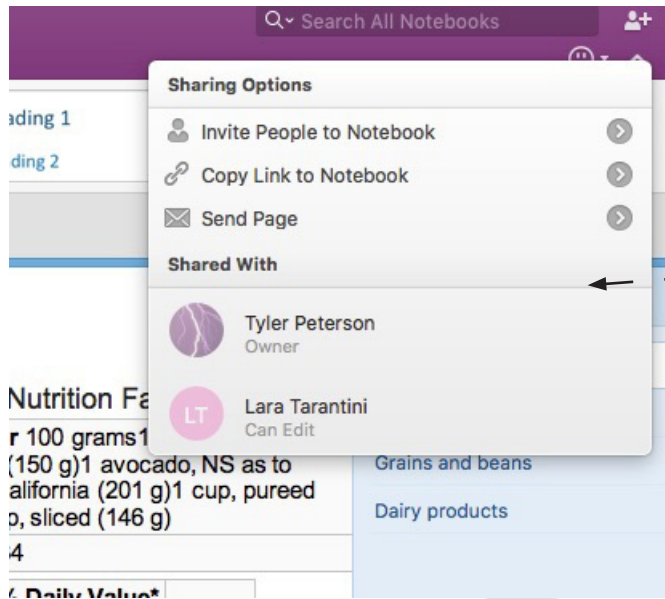
1. Exporting notes as pdfs

- You can export any page as a pdf through the menu: select File > Save as PDF and save to whichever location you want; this can also be printed and emailed
- **Note about pdfs:** as mentioned above, you should try to stay within the margin limits of a typical page, or the pdf you produce looks funny, with edges of the page printed on separate pages! This takes some trial and error...

2. Sharing and collaboration

- As with the mobile version, you can invite others to either view or edit your pages:





You can always check and change the permission for a particular notebook under the 'Shared With' section

Any edits your collaborator makes will appear where they enter or place them, along with their initials

3. Exporting specific media from the page

- Any of the media on the page (i.e. photos, audio, text, etc.) can be individually exported
- Doing this is fairly lo-tech, but also easy and useful:
 1. *Text: highlight, right-click, and copy - just as you do in a word processor - then paste it into an email, PowerPoint or document*
 2. *Audio: right-click on the audio icon and then choose 'Save as...' to a location of your choice*
 3. *Photos: right-click on the photo and then choose 'Save as...' to a location of your choice*

announce it advocado. It is the

I like avocados!!!

LT



Here is a picture of an avocado tree

ly, April 27, 2016

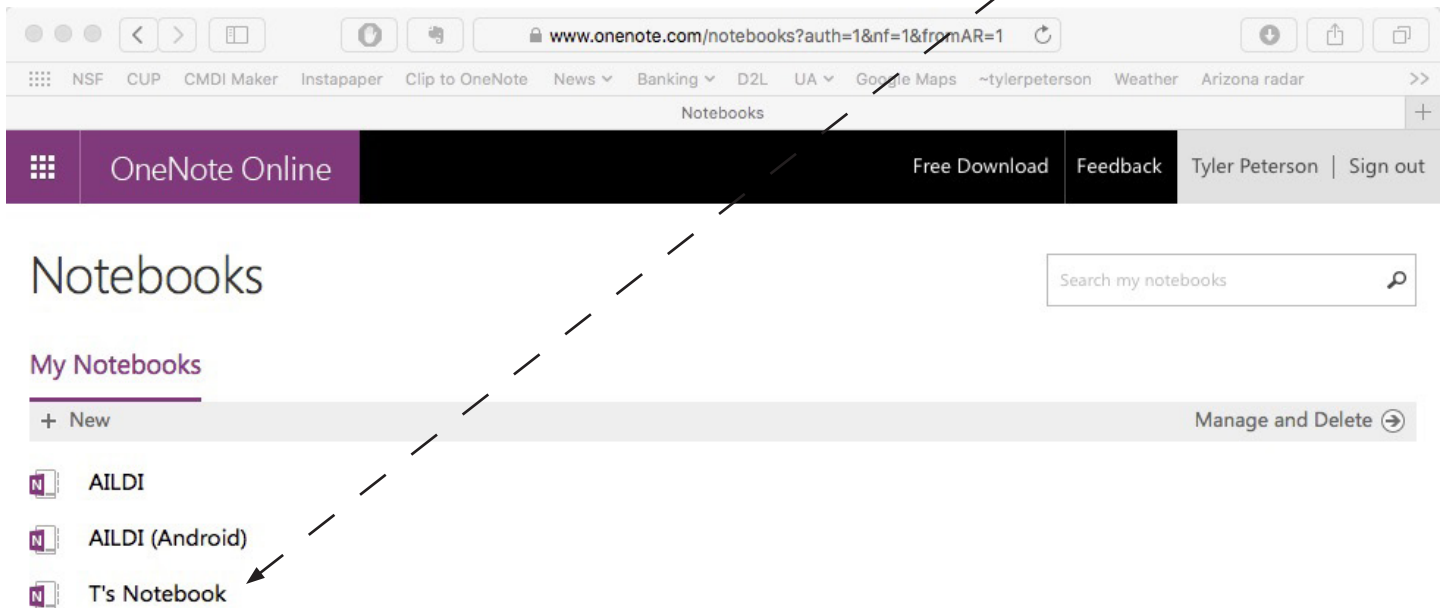
ient in lemonade.

Using the online web version of OneNote, and some points of difference between a Mac and PC

- Interestingly, the PC version of OneNote is somewhat more limited than the Mac version (which I demonstrated here), but it still has all of the functionality for the purposes of editing
- An excellent alternative to using the PC desktop software version of OneNote is to use the online, web version of OneNote - however, this relies on having an internet connection
- **PC users: I recommend using the online version of OneNote for collaboration and sharing!**

To use the web/online version of OneNote

1. Open a web browser and go to **www.onenote.com** (button on the top right of the screen) and sign in with the account you created to use with the mobile version
2. This will open a very clear looking start page; open the Notebook you'd like to work on



3. This will then open that Notebook and take you to something that looks like this...

The layout is different from the desktop application version (the tabs along the top are now sections along the left), but it looks very similar to the mobile version - all of the same editing tools are here

The screenshot shows the Microsoft OneNote Online interface. The top navigation bar includes 'FILE', 'HOME', 'INSERT', 'VIEW', 'AUDIO', 'PRINT', and a search bar. The left sidebar shows a notebook structure with sections like 'Food', 'Clothing', 'Furniture', and 'Utensils'. The main content area is titled 'Fruits and vegetables' and contains:

- A photograph of an avocado on a wooden surface.
- An audio recording icon labeled 'Audio 1' with a timestamp: 'Audio recording started: 12:58 AM Wednesday, April 27, 2016'.
- Text describing the avocado: 'This is an avocado. Some people pronounce it advocado. It is the main ingredient in guacamole.'
- A nutrition table for Avocado.
- A highlighted text box: 'I like avocados!!!'
- Partial images of a lemon and a green leafy plant at the bottom.

Amount Per 100 gram (146 g)1 cup, cubes (NS as to Florida or C	
cup, pureed (230 g)1 g)	
Calories	234
% Daily Value	
Total Fat	21 g
Saturated fat	3.1 g
Polyunsaturated fat	2
Monounsaturated fat	
Cholesterol	0 mg
Sodium	10 mg
Potassium	708 mg
Total Carbohydrate	
Dietary fiber	10 g
Sugar	1 g
Protein	2.9 g
Vitamin A	4%
Calcium	1%
Vitamin D	0%
Vitamin B-12	0%

All of the media objects (photographs, audio, text, etc.) can be moved, resized, and copied for export into other documents (i.e. right-click, copy, paste)

Synchronizing, sharing and exporting notes

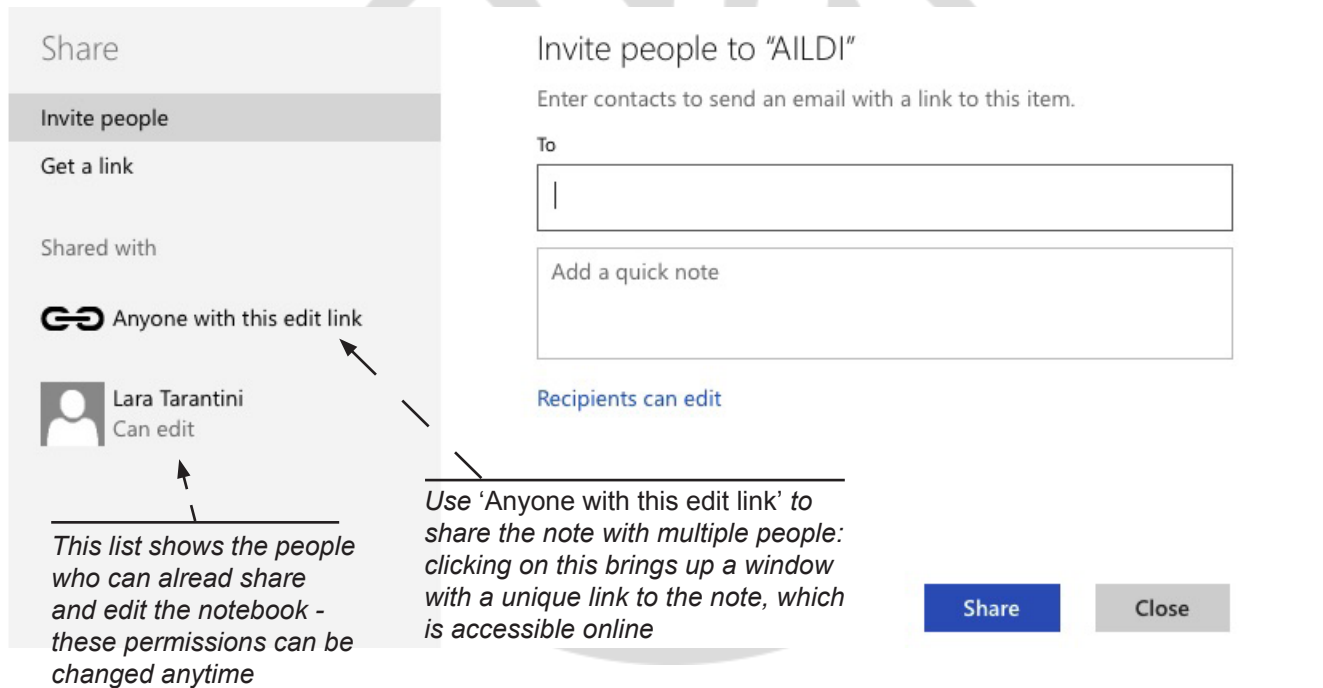
- As with creating notes on your mobile (and desktop) version, **all of your notebooks will synchronize automatically** with the all the other devices linked to the same account: **including all of the edits you made with the online/web version**

1. Exporting notes as pdfs

- You can export any page as a pdf by choosing 'Print', which includes an option to print out the note or save it as a pdf (there is no email function so far)
- Note about pdfs:** as mentioned above, you should try to stay within the margin limits of a typical page, or the pdf you produce looks funny, with edges of the page printed on separate pages! This takes some trial and error...

2. Sharing and collaboration

- As with the mobile version, you can invite others to either view or edit your pages by clicking on the 'Share' button near the top right of the menu; the following window will appear:



Use 'Anyone with this edit link' to share the note with multiple people: clicking on this brings up a window with a unique link to the note, which is accessible online

This list shows the people who can already share and edit the notebook - these permissions can be changed anytime

Take away points:

- The help files for OneNote are not great, but they are constantly improving and there are many online forums for solving problems or learning other features
- As with any new program, it takes some time getting used to; but the more you use it the better you get at it!

Remember to explore and experiment with the program: you will never do any damage to the program or any of the media you collected!

And OneNote has many other features (like drawing) that were not discussed here!