CPA
Practice **Advisor**

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I've been using Microsoft's OneNote off and on since its initial release with Office 2003. OneNote was Chris Pratley's brainchild, and, according to his blog, the initial version was referred to as 'Scribbler.' The idea is that OneNote is a piece of software that allows you to immediately add important information to your digital world (like say from a current phone call) without having to navigate through a bunch of dialog screens. For example, I'm talking to a prospective client on the phone and I want to capture their phone number(s), physical and e-mail addresses. If Outlook is my software of choice, I have to navigate to contacts, open a new contact and then start filling in information. With OneNote, I just click (once) on the system tray icon and I'm presented with an electronic blank page for taking notes. When my call is finished, I can then move the information to Outlook (more on that later) or whatever. I've even found it easier than grabbing that proverbial yellow pad. At least I know where to start looking for notes, and, unlike the yellow pad, I can search through all my notes for a word or phrase.

The one (excuse the pun) drawback to OneNote has always been the inability to carry my notes with me. With the next release (part of the Office 2007 suite), OneNote now synchronizes with my PocketPC. Imagine taking a picture of a business card while out of the office and synching with your desktop when you return, capturing the text from the picture of the business card and pasting it into an Outlook contact record. OneNote recognizes text in pictures. I can take any kind of note with my mobile device (even an audio note), and OneNote will search it.

A OneNote primer: OneNote is organized into notebooks, sections and pages. Think of a notebook as a spiral bound book, a section as a tab in that book

and a page as (well) a page. Of course, if I wanted to move a note from the

or calendar item, and get a new OneNote page for notes with a link back to the Outlook item.

- Click on the OneNote link button while in Internet Explorer, and (you guessed it) capture that web page as a note complete with links.
- With the OneNote clip feature, you can literally capture part of your screen for inserting into OneNote (or any other application that can take a *.PNG graphic).
- Drag and drop virtually anything to my OneNote notes.
- E-mail notes to others. This is great for sharing (but only if the person you're sharing with has OneNote).
- Publish notes as *.PDF or *.XPS – fixed file formats (for those who don't have OneNote).
- Flag notes with all kinds of standard or custom flags.

OneNote has a sharing function with which I have not had a lot of success. The concept is that a team of individuals can concurrently work on a note like a whiteboard in a conference room. Good concept, but if you're behind a firewall, you may have difficulty connecting. If you use a common shared drive, it will work better.

If you just assumed that OneNote was a toy or for students, you should take another hard look at this productivity tool.

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