

# A Quick Start Guide to Field Documentation using Microsoft OneNote: Part 1 (mobile)

## Features:

- Microsoft OneNote is a free information-gathering software that is ideally suited to field language documentation
- With the OneNote mobile version you can
  - take text notes
  - make high quality audio recordings (depending on your device)
  - take high quality pictures (depending on your device)
  - basic drawing and annotation of other files (pdf)
- All of the above can be automatically synchronized with the desktop version (also free), where they can be further edited, processed exported to other programs for publication or sharing
- OneNote is available in the desktop version for both Mac and PC (Windows), and all mobile devices and operating systems (Apple iPad and iPhone, Android and Windows)
- You have to download it onto your device (likely from one of the app stores on the left) and sign up for a free Microsoft account (or login to your own Microsoft account if you have one already)
- You can also share and collaborate with others who have OneNote installed
- Simple export functions allow you to quickly and easily generate pdf files ready for email (on most but not all devices)



## 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 structures and functionality
- As with any pictures, audio, or videos, you need to think about how much storage space you have available on your device
- 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 an iPad (mini) and a typical Android smart phone (see me for directions on a Microsoft Surface or other Windows device)**



## Checklist for this workshop:

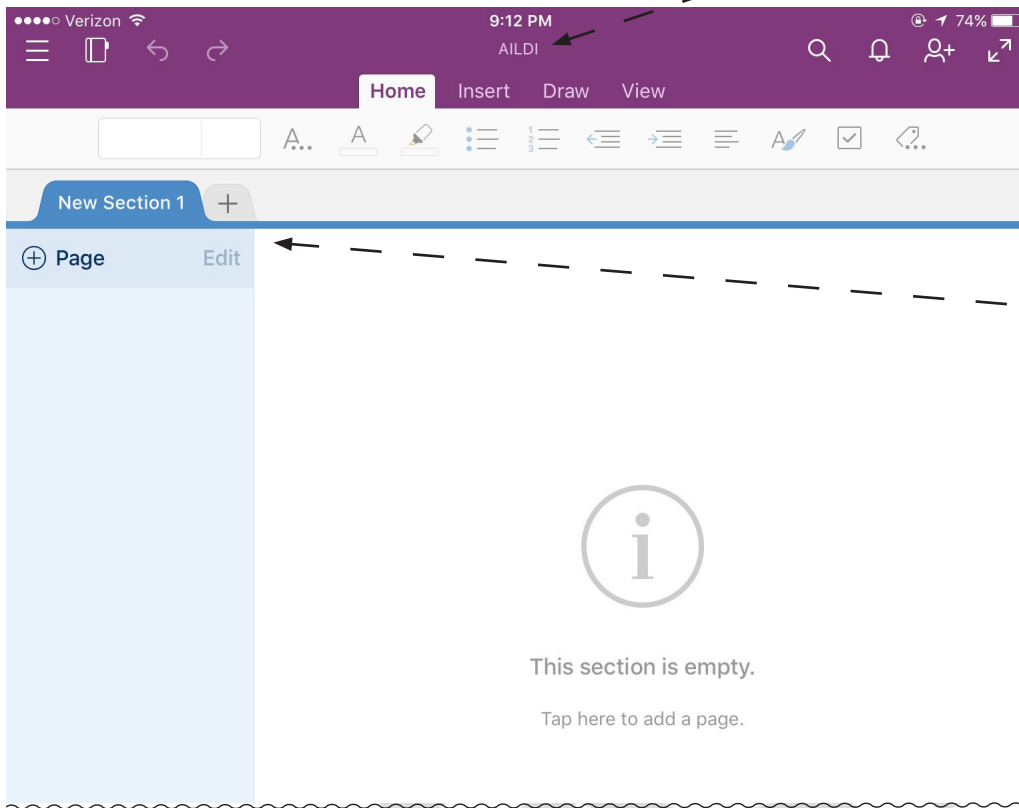
1. Any portable device (phone/tablet; iPhone/iPad, Android, Windows)
2. The camera and microphone functions properly
3. OneNote installed and functioning (logged into a MS OneDrive account)
4. Make sure your device is charged before heading out!
5. Eventually, access to the internet for synchronization - **but this is not necessary when we collect data in the field!**

**Please go to the section for your mobile device:**

- iPhone or iPad: Section 1 (p.2)
- Android phone: Section 2 (p.8)

# 1. Finding your way around OneNote on the iPad\*

- Everything in OneNote is about creating and editing notes, which can contain a variety of media, such as photographs, text, audio, and (depending on the version) drawings
- Notes belong in 'Notebooks', which you can create to categorize different things: when opening the program for the first time you will be asked to give your new (and so far only) notebook a name
- Once this is done the blank notebook with the name on the top will be opened (colors may vary)



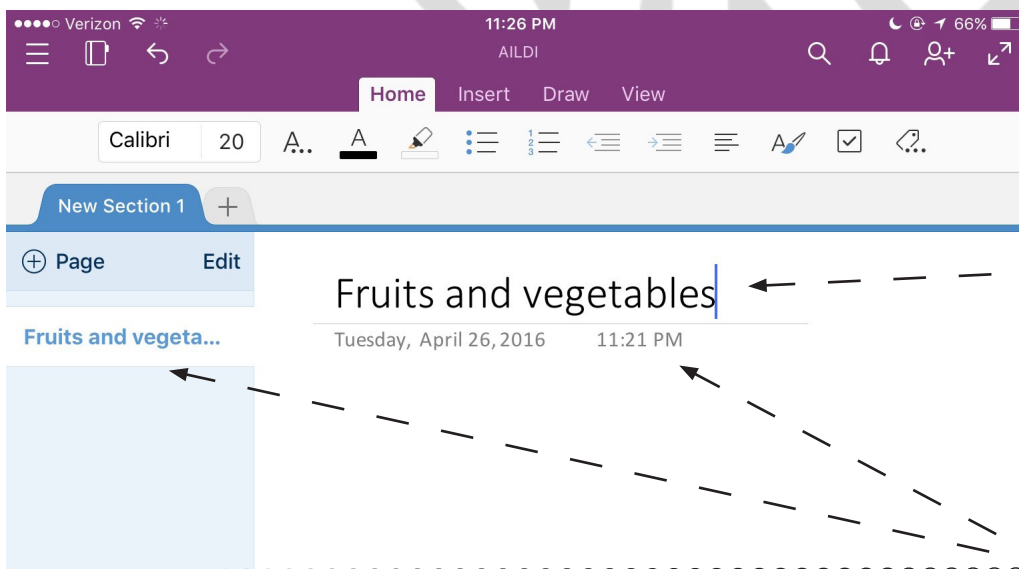
*This is what it looks like after you start your first notebook on the iPad (I named my notebook AILDI)*

*Each notebook is divided into 'Sections' which contain 'Pages'*

**You can use these to start thinking about how you want to organize the things you collect**

*You can have as many sections and pages as you like*

**There is no 'save' button:** everytime you make an edit (adding, deleting, moving, etc) it saves automatically



*Tap on the + with the circle around it to add a new page to the default section (which we will rename later)*

*A new page will be added to the list, and the cursor will appear at the top of the new page, ready for you to type the name of the page*

*I've decided to collect data about fruits and vegetables*

*The name of this page will automatically be added to the list under the section and time and date stamped*

*\*This demonstration uses the iPad 4 Mini, but it shouldn't look that different on other iPads*

# Sample project and workflow: documenting household objects

## General structure of OneNote:

1. **Notebooks:** top-level category such as a project (i.e. AILDI); you can create as many as you want
2. **Tabs (or Sections):** the major categories like 'Food', 'Clothing', 'Furniture', etc.
3. **Pages:** subcategories for food like 'fruits and vegetables', 'ingredients for making bread' etc.
4. **Media:** photographs, audio recordings, text (other media such as internet hyperlinks, docs, .pdfs, etc. can also be inserted)

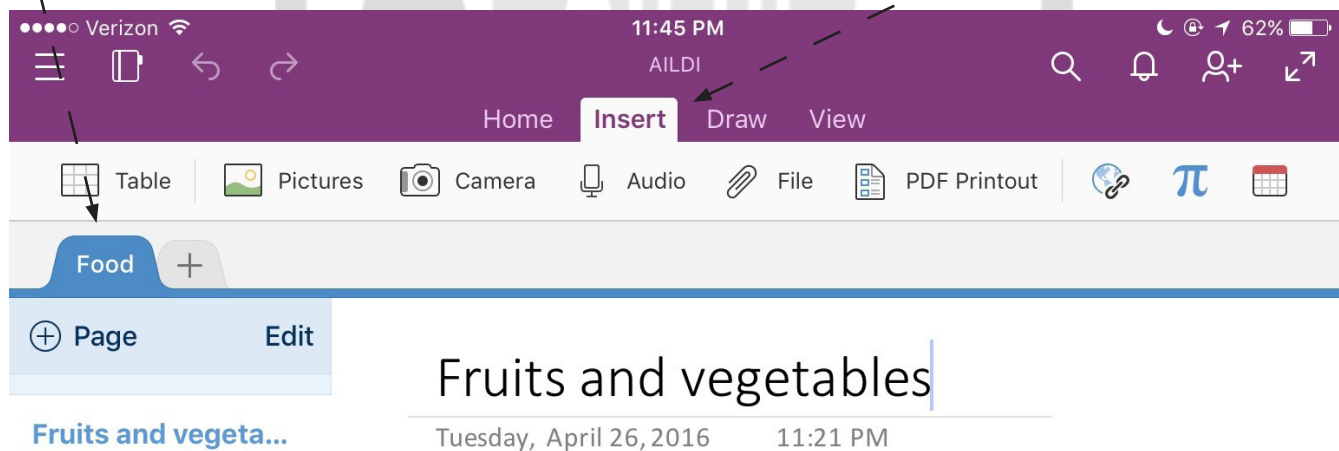
## Thinking about your plan!

1. Notebook (only one open at a time):
2. Tabs (or Sections):
3. Pages:
4. Media:


## Step 1: Naming things and getting familiar with inserting a photo into a page

To change the name of the Tab (the 'major' category), press and hold the tab; you will be prompted to rename it (or delete it etc.)

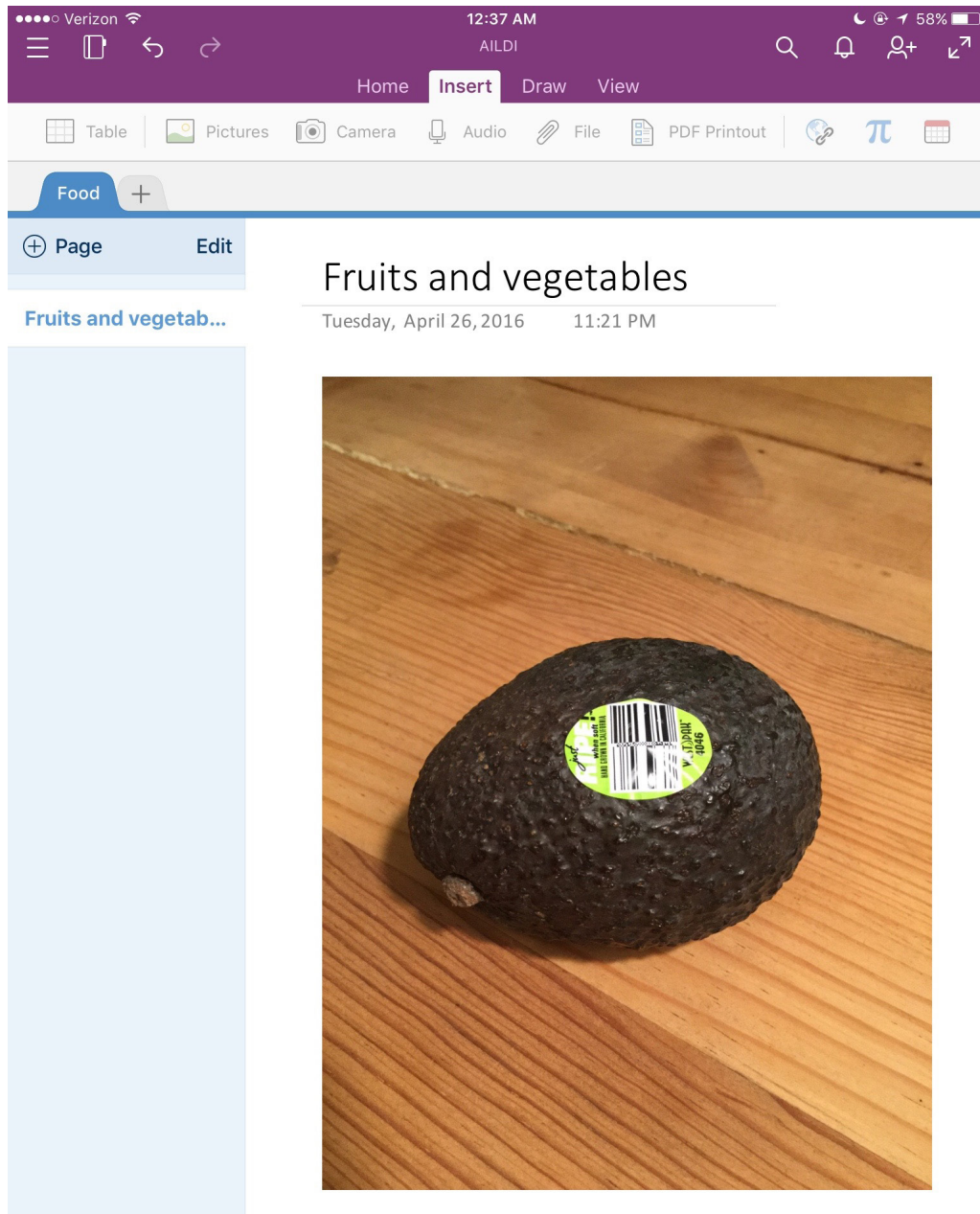
Media (photos and audio) is added by 'inserting' it into the page; press on the 'Insert' tab to find the kinds of media that can be inserted



We will start with adding a photograph to our note: simply tap somewhere in the white space on the page (usually somewhere in the top left, right below the page title) and the cursor will appear on the page - this is the position on the page where the photo we take with the camera will be inserted


1. Press the  Camera button, this will open your camera app
2. Take a picture of the object (using the best angle and lighting possible)
3. You will be prompted to save the picture - **this looks slightly different on every device, but it should look similar to when you take a picture normally!**
4. Once you save the picture it will be inserted into the page at the position of the cursor and look something like this...

Usually the photograph is scaled automatically to fit the screen (this can be moved and resized later):

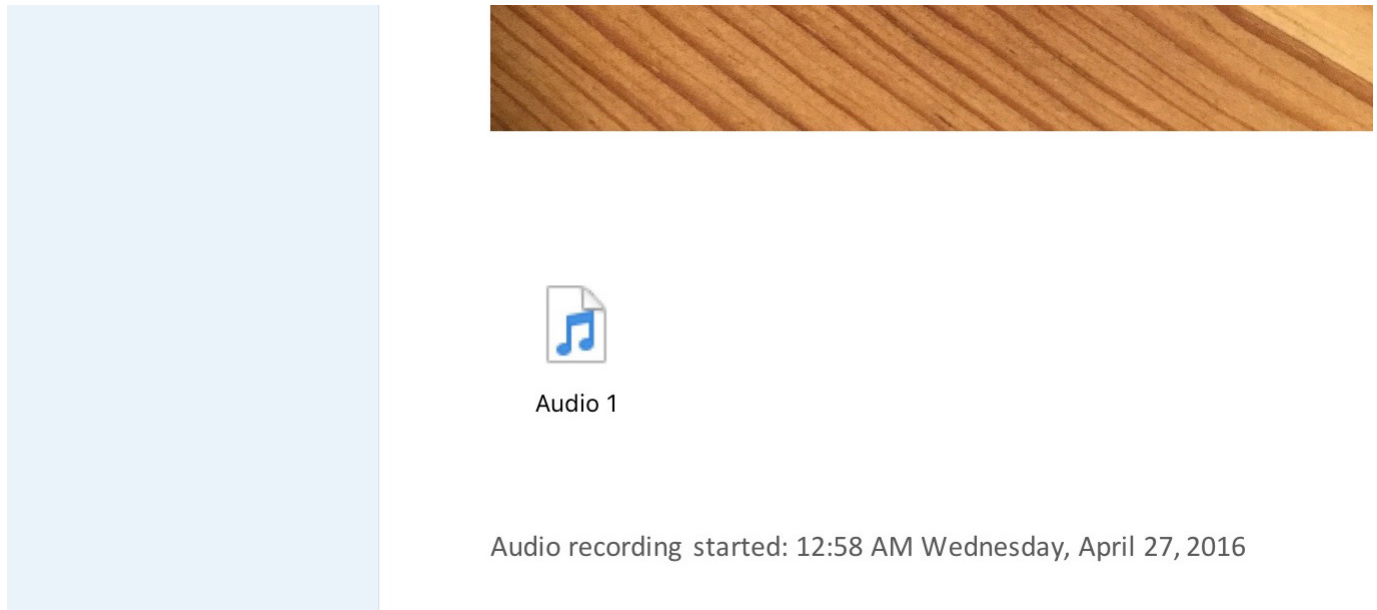


## Step 2: Inserting an audio recording into a page

We will next add a short audio recording to our note: this can be anything you want and as long as you want, from naming the 'avocado' in the language to a description of it and its uses (i.e. to make guacamole!)

1. Press somewhere in the white area slightly below the picture and the cursor will pop up again; this is the position where the accompanying audio file will be inserted
2. Press the  Audio button: **be prepared as the audio will start recording immediately!**
3. When you are finished press 'Stop Recording' (this may look slightly different on different devices); you can repeat the step if necessary
4. The audio recording will be inserted below the picture (the position where you pressed on the white area)
5. The audio file is graphically represented as an icon, something like this...

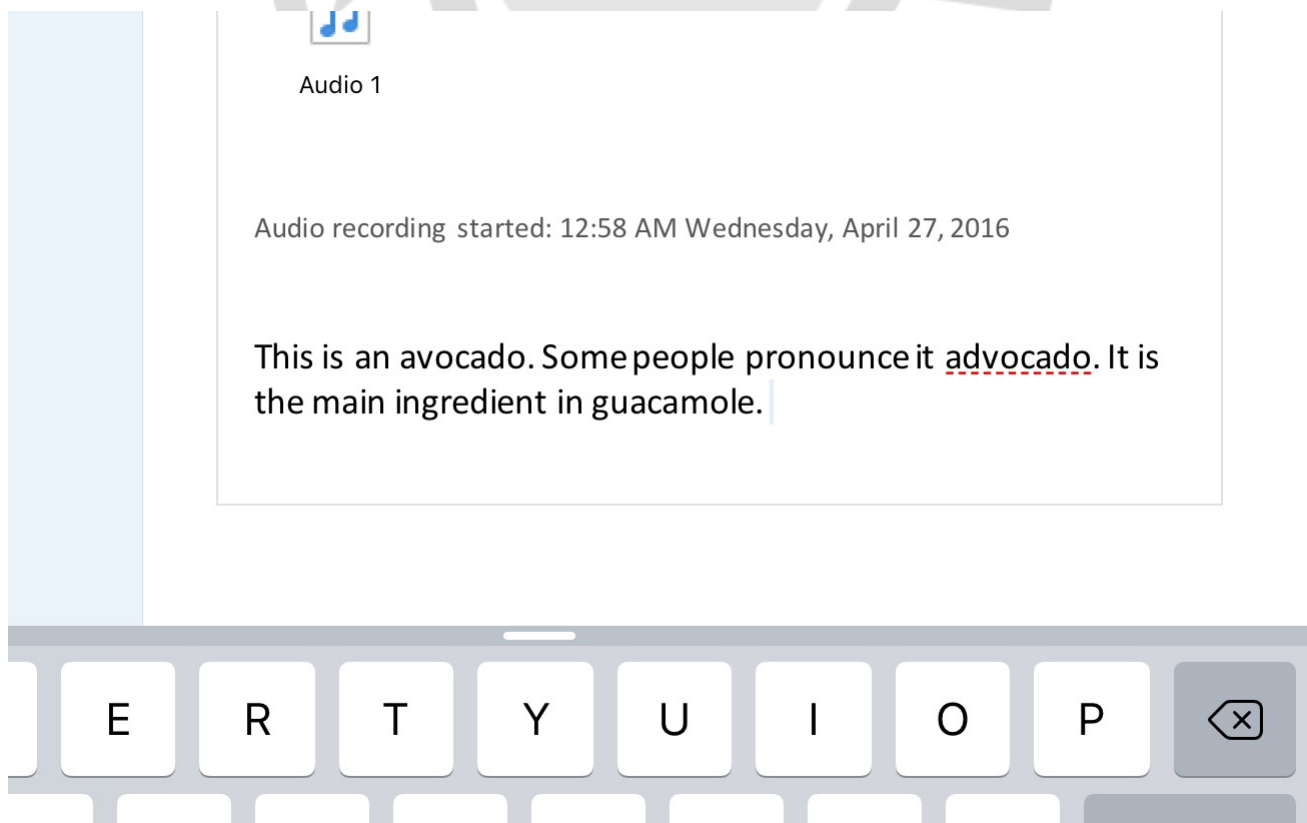
The actual audio file is automatically named 'Audio 1' and a time/date stamp appear immediately below it:

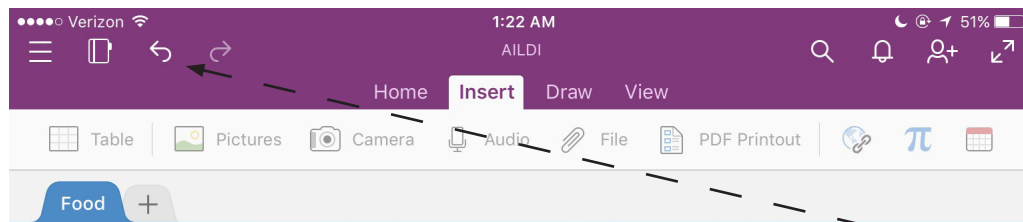


### Step 3: Inserting text into a page

We will next add some text: this can be a direct transcription of what was said, or anything you want - **remember that you can always edit the text later!**

1. Press somewhere in the white area slightly below the audio time/date stamp and the cursor will pop up again; this is where the text will be inserted
2. The usual keyboard will pop up on your device and you can start entering text
3. Remember that everything is saved automatically after every edit you make





*These steps can be repeated as many times as you need; I added another fruit to this page immediately below my entry for avocado*

*You can always delete or undo any edit*

*Any picture you take will usually also be saved as a picture on your device (where you usually find your pictures)*

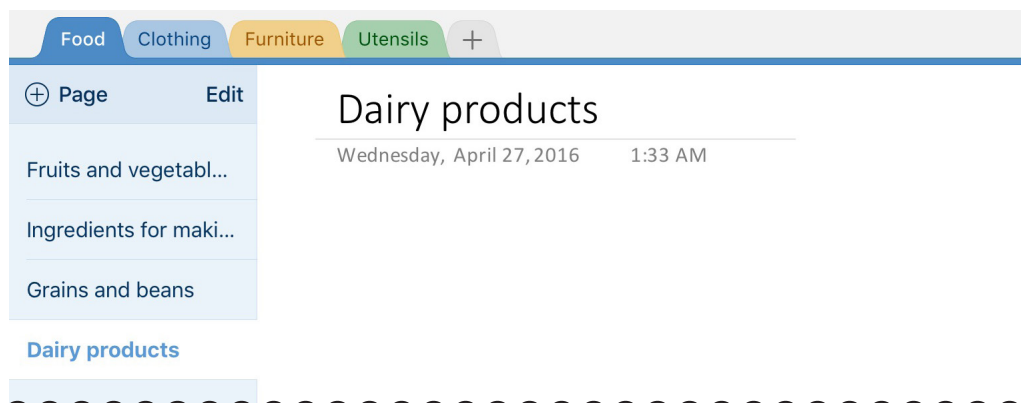


Audio 2

*The names of the audio files are sequentially updated, along with the time/date stamp*

Audio recording started: 1:21 AM Wednesday, April 27, 2016

This is a lemon. It is the main ingredient in lemonade.



*When you're ready you can add more Tabs and Pages, depending on the categories you've decided*

## Synchronizing, sharing and exporting notes

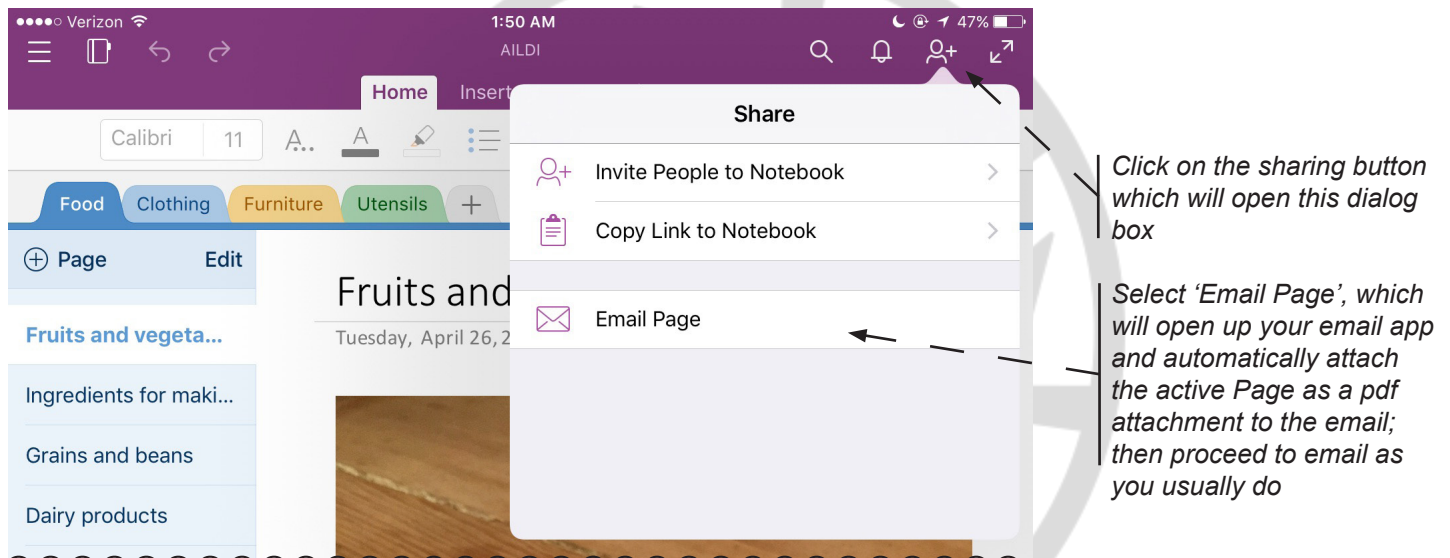
- There are a number of options for sharing and exporting notes for the purposes of collaboration and editing

### 1. Synchronizing for editing on the desktop version of OneNote

- The editing functions on the mobile version are limited; this is usually done on the desktop version of OneNote (which is free and downloadable from wherever you usually download software)
- Once you have downloaded and installed the desktop version of OneNote and sign in with your account, **all of your notebooks will synchronize automatically** (Part 2 of this guide)

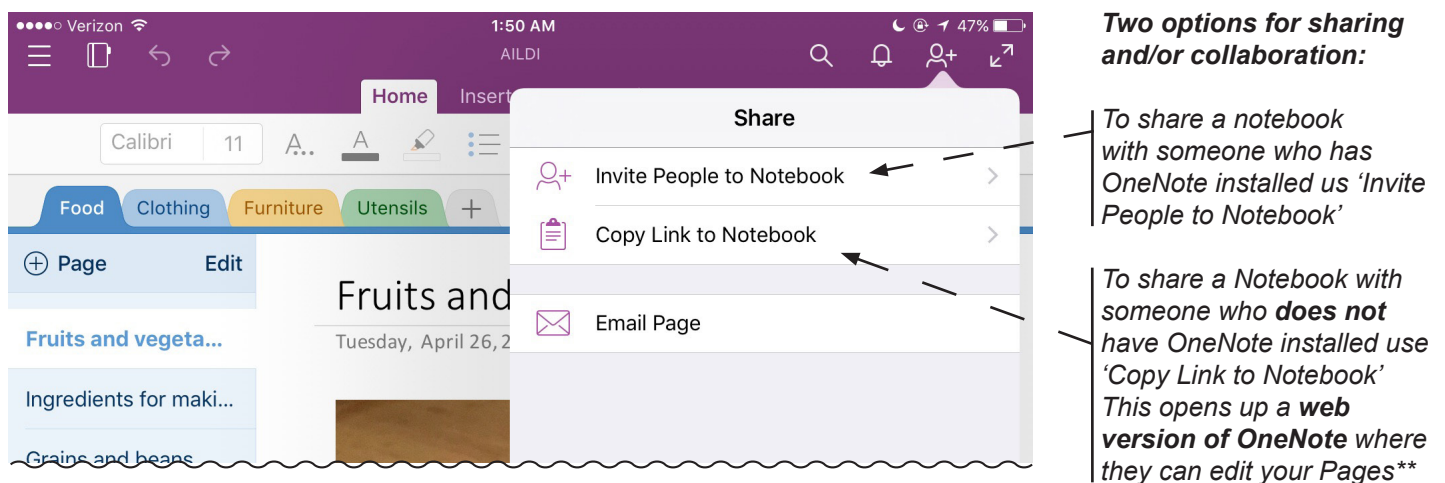
### 2. Sharing from the app

- 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 files typically don't contain audio files), but it's convenient for simple sharing of pictures and text:



### 3. Sharing and collaborating

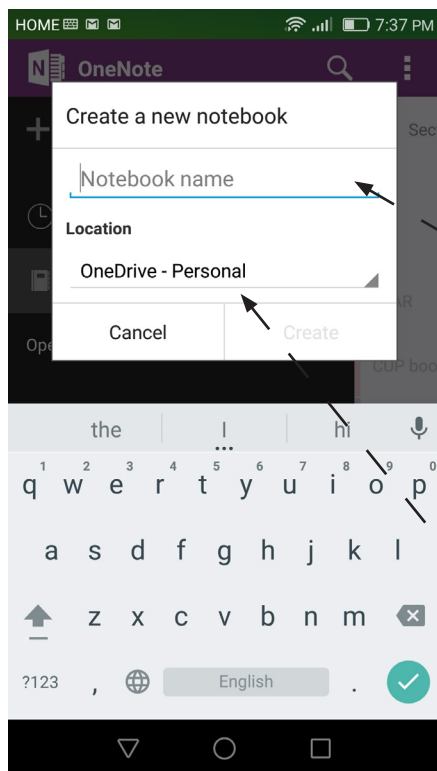
- A very useful feature of OneNote is that you can share your Notebooks with others who have OneNote - using this feature you both can edit all of the content of the Notebook



*\*\*I have not had a chance to test this thoroughly*

## 2. Finding your way around OneNote on an Android phone\*

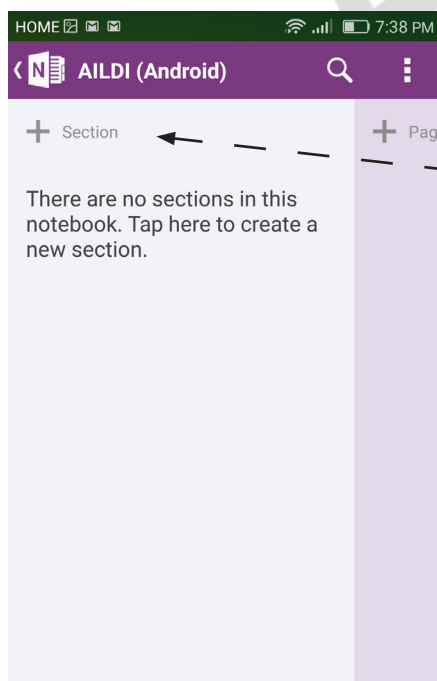
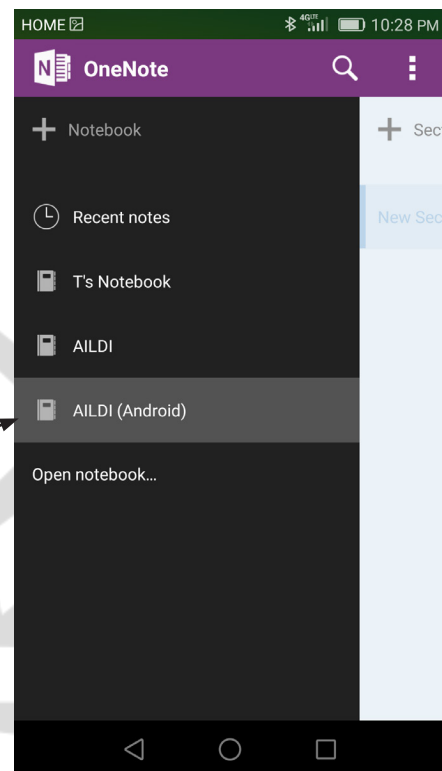
- Everything in OneNote is about creating and editing notes, which can contain a variety of media, such as photographs, text, audio, and (depending on the version) drawings
- Notes belong in 'Notebooks', which you can create to categorize different things: when opening the program for the first time you will be asked to give your new (and so far only) notebook a name
- Once this is done the blank notebook with the name on the list will be opened (colors may vary)



*This is what it looks like after you start your first notebook on a typical Android phone*

*You can create a new Notebook by pressing the '+ Notebook' button (I named my demonstration notebook AILDI (Android))*

*The default location is OneDrive - the cloud drive; this is for synchronization (and sharing), which we'll use*

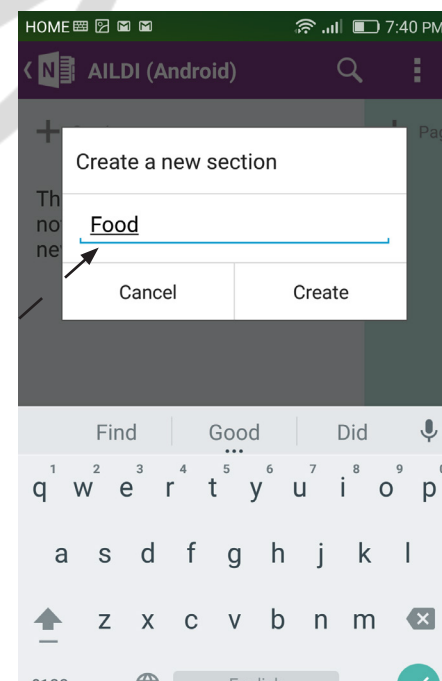


*Swipe left and you find that each notebook is divided into 'Sections' which contain 'Pages'*

*Tap on the '+ Section' to add a new section, and then name it*

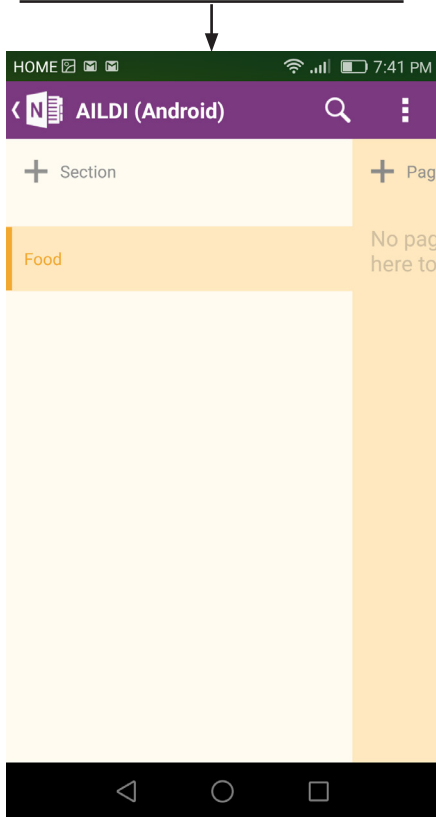
*I've decided to collect data about food, so this is what I name this section*

**You can use these to start thinking about how you want to organize the things you collect**

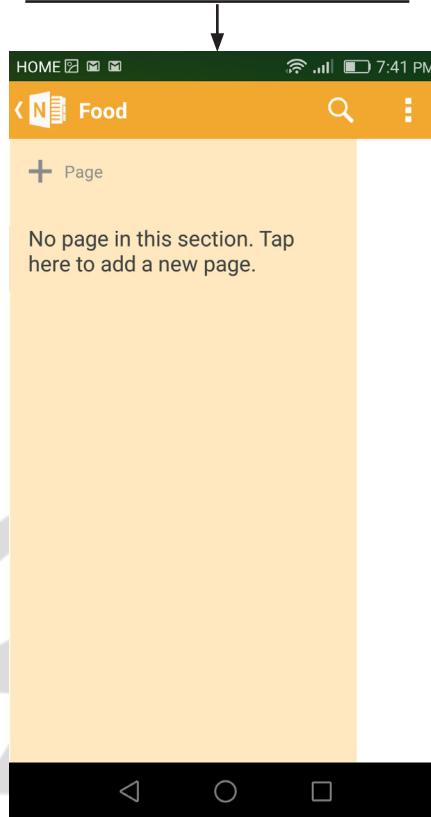


\*This demonstration uses the Samsung Honor 6

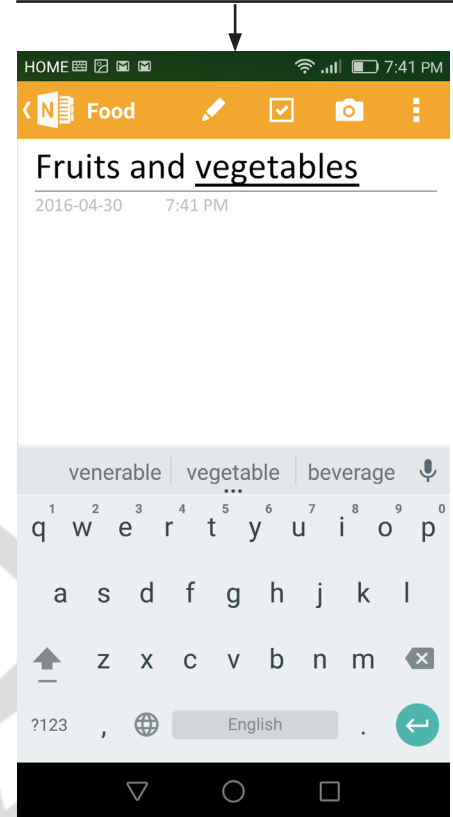
Now you have a 'Section' (Food)  
which you can add pages to...



....by swiping to the left and clicking on the '+ Page' button...



....and then after tapping on the title area  
at the top, type Fruits and Vegetables...



- The creation of the page is time and date stamped and ready to collect picture, audio and texts!

## Sample project and workflow: documenting household objects

### General structure of OneNote:

1. **Notebooks:** top-level category such as a project (i.e. AILDI (Android)), as many as you need
2. **Sections (or Tabs):** the major categories like 'Food', 'Clothing', 'Furniture', etc.
3. **Pages:** subcategories for food like 'fruits and vegetables', 'ingredients for making bread' etc.
4. **Media:** photographs, audio recordings, text (other media such as internet hyperlinks, docs, .pdfs, etc. can also be inserted)

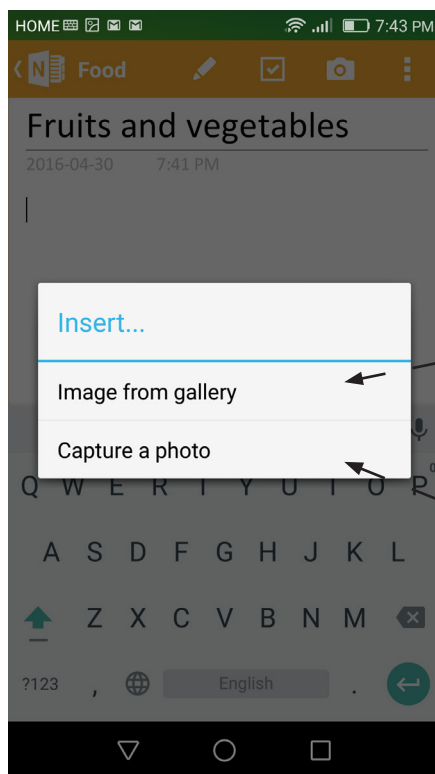
### Thinking about your plan!

1. **Notebook (only one open at a time):**
2. **Sections (or Tabs):**
3. **Pages:**
4. **Media:**

## Step 1: Getting familiar with inserting a photo into a page

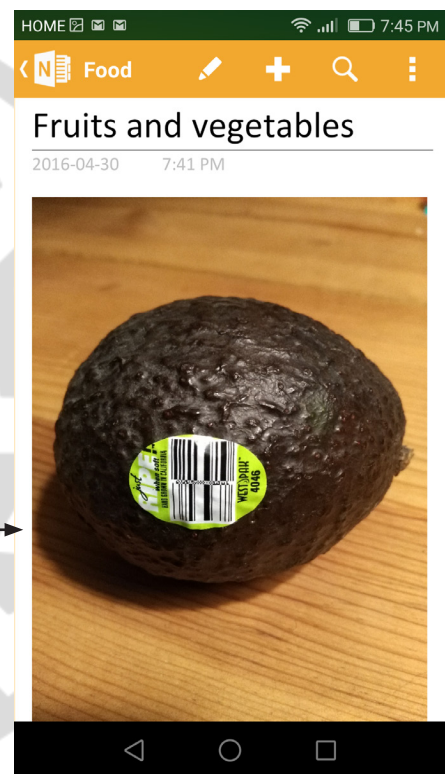
We will start with adding a photograph to our note: simply tap somewhere in the white space on the page (usually somewhere in the top left, right below the page title) and the cursor will appear on the page - this is the position on the page where the photo we take with the camera will be inserted

1. Press the Camera button (right), this will open your camera app
2. Take a picture of the object (using the best angle and lighting possible)
3. You will be prompted to save the picture - **this looks slightly different on every device, but it should look similar to when you take a picture normally!**
4. Once you save the picture it will be inserted into the page at the position of the cursor and look something like this...



In most phones there is also an option to insert a picture that you've already taken

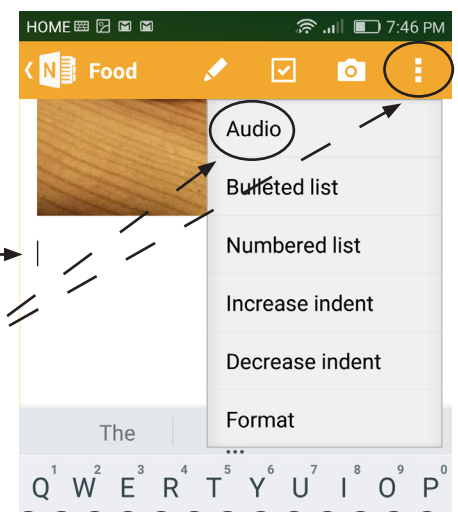
The picture is then inserted approximately where the cursor was, and it is usually automatically scaled to fit the screen

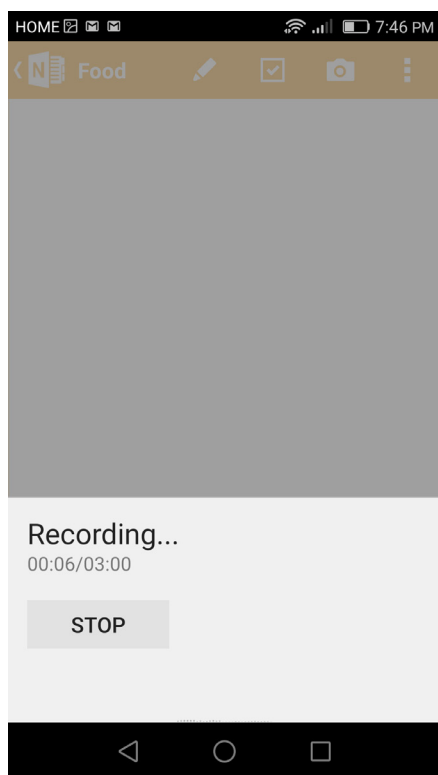


## Step 2: Inserting an audio recording into a page

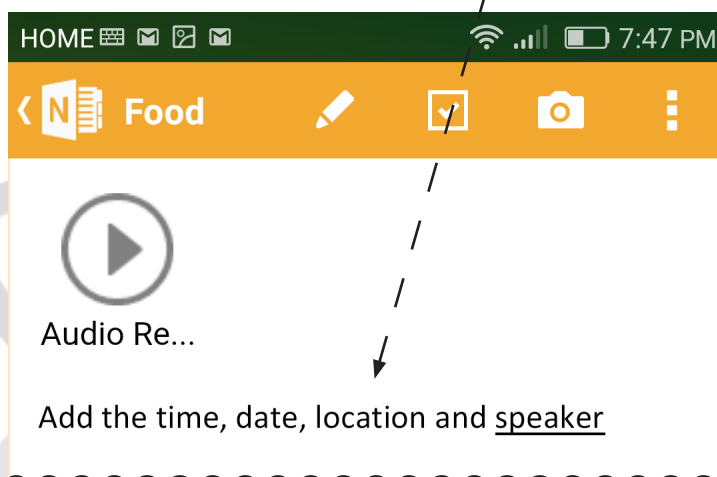
We will next add a short audio recording to our note: this can be anything you want and as long as you want, from naming the 'avocado' in the language to a description of it and its uses

1. Press somewhere in the white area slightly below the picture and the cursor will pop up again; this is the position where the accompanying audio file will be inserted
2. Find the Audio button under the menu button (circled): **be prepared as the audio will start recording immediately!**





3. When you are finished press 'STOP' (this may look slightly different on different devices); you can repeat the step if necessary
4. The audio recording will be inserted below the picture (the position where you pressed on the white area)
5. The audio file is graphically represented as an icon
6. On some versions of OneNote a time stamp is not automatically added - add one if necessary!

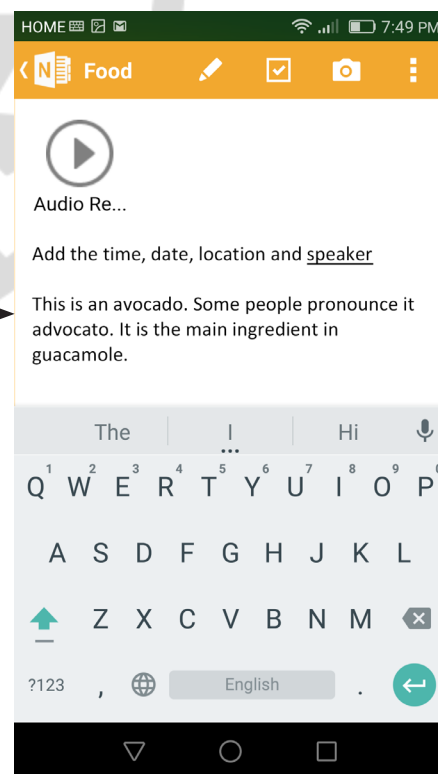


### Step 3: Inserting text into a page

We will next add some text: this can be a direct transcription of what was said, or anything you want - **remember that you can always edit the text later!**

1. Press somewhere in the white area slightly below the audio time/date stamp and the cursor will pop up again; this is where the text will be inserted
2. The usual keyboard will pop up on your device and you can start entering text
3. Remember that everything is saved automatically after every edit you make (even small edits)

- These steps can be repeated as many times as you need; I added another fruit to this page immediately below my entry for avocado (see first screencap on the next page)
- Any picture you take will usually also be saved as a picture on your device (where you usually find your pictures)
- Because of the small screen you can't see everything on the note at once - this takes some getting used to!

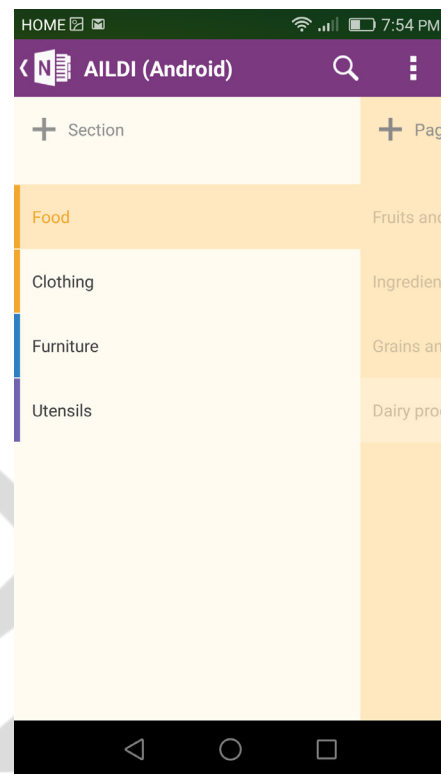
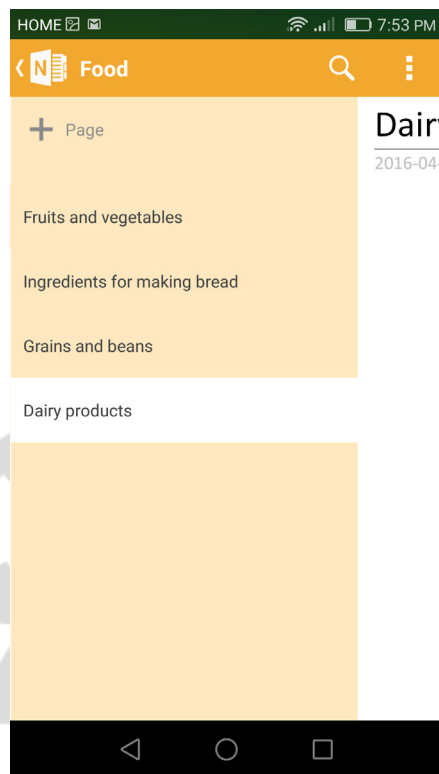
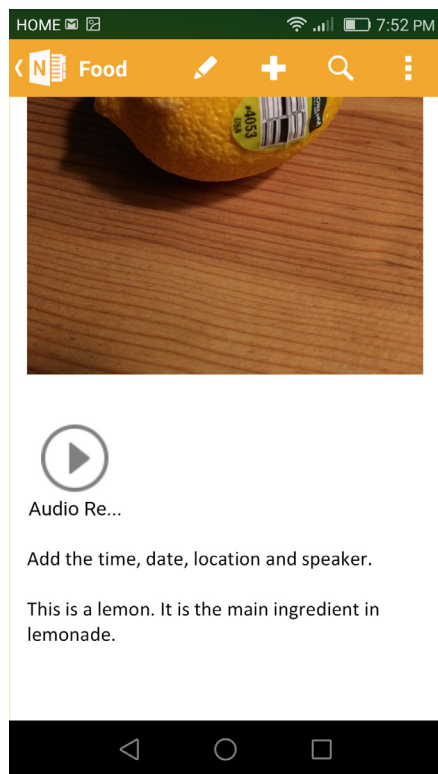


**Remember: navigation between Notebooks, Sections, and pages is done with the usual swiping left and right on a phone (and some tablets)!**

*A continuation of the note with a photo of a lemon, an audio file, and some text added*

*Each page you create will be added to the list of pages under that section (i.e. 'Food')...*

*.... and each section you create will be added to the list of section in that Notebook (i.e. AILDI (Android))*



## Synchronizing, sharing and exporting notes

### 1. Synchronizing for editing on the desktop version of OneNote

- The editing functions on the mobile version are limited; this is usually done on the desktop version of OneNote (which is free and downloadable from wherever you usually download software)
- Once you have downloaded and installed the desktop version of OneNote and sign in with your account, **all of your notebooks will synchronize automatically** (Part 2 of this guide)

### 2. Sharing from the app

- Unfortunately, there does not seem to be an option for sharing notes (or Notebooks, Pages) directly from the Android version of OneNote; however, this is expected to change
- Because of this limitation, plan to share your notes (or Notebooks, Pages) using the desktop version of OneNote, which does have very good sharing and collaboration features (see Part 2 of this guide)