

Organizing Your Genealogical Research Using Microsoft OneNote

Bob Inhoff

bob@bobsgenealogyquest.com

December 19, 2019

OneNote is a free digital organizing application from Microsoft. Notes, photos, documents, clippings and more can be organized in digital "3 ring binders" with dividers grouping pages by topics. OneNote offers powerful search, linking and sharing features which enhance productive research.

Note about OneNote Formats: **One of the great features of OneNote is that it is available across all devices from your desktop computer (Windows or Mac), tablets (Apple, Android or Windows) and smart phones.** What you add on a research trip on your phone and/or tablet will be available on your desktop when you return home.

Microsoft announced in 2018 that they are moving to have a uniform format across all these platforms. This will be a change only if you have been using OneNote which comes with Microsoft Office, such as OneNote 2016, which has a different format and some different features. This lecture focuses on the universal format that is used in Windows 10 and mobile devices. Even though the two versions have differing formats, you can use both and data saved to OneDrive will be available on both. (Note: On November 19, 2019 Microsoft announced that they will continue the development and support of OneNote 2016 at least until 2025.)

Cost: OneNote is FREE. Moving forward OneNote will store all of its notebooks in Microsoft's cloud storage service called OneDrive. With a free Microsoft account, you get 5 gigabytes of free storage, which is quite adequate for nearly all users. Additional storage is available at a nominal cost. Storing the notebooks in OneDrive enables continuous backups and makes your notebooks available on your other devices, such as a tablet or phone. You can still work offline and have your data sync when you have an internet connection later.

Getting Started with OneNote

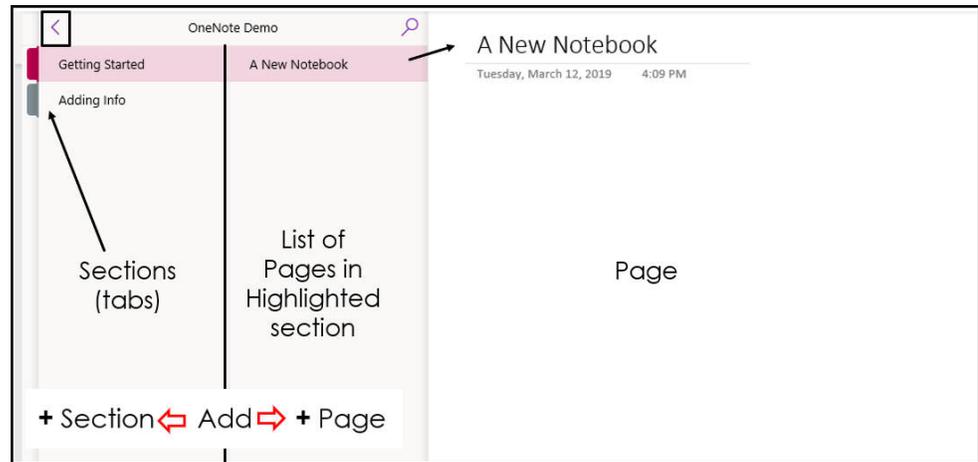
- **Sign in to onedrive.com** – If you don't already have a free Microsoft account, follow instructions to create account. (*See link to video and written instructions below.*) OneDrive is the cloud storage where your notes will reside, so that they can be accessible on other devices.
- **Starting with OneNote** - if you are using Windows 10, OneNote is already installed. On other devices download the free app from the app store or online. There is also an online version of OneNote which you can access at onenote.com. Click on the "Sign in" button.

The OneNote Layout

You can have as many notebooks, with as many sections, with as many pages as you want. Pages can be any size.

The OneNote Layout

(click on “+” to add a new Section or Page)



Adding Information to a Page

1. Type text anywhere on page. You can format, resize or drag to anywhere on page
2. Add Images from a file
3. Take a picture with your smart phone or tablet and add to page
4. Add a clipping from a website – part or all of page*
5. Add a table
6. Add a document saved on your computer – by link or by full document
7. Print directly to a page in OneNote from another application*
8. Forward an email directly to OneNote
9. Add a recording – or dictate to OneNote
10. Embed a video link
11. Add interactive ToDo boxes
12. Draw
13. Add Tags, including custom tags
14. Copy or move pages between sections or notebooks

* You can download the free **OneNote Web Clipper** and **Send to OneNote** from the App Store.

Manage your data with these Powerful Tools

Links

- Add external links to webpages – such as an individual’s Ancestry DNA page, or a page from FamilySearch or documents on your computer or in cloud storage, such as OneDrive or Dropbox
- Add internal links to other sections, pages or even specific paragraphs of a long document. You can also create links to another OneNote Notebook or a page in the notebook.
- Create a link to a page or a section which can then be saved to an external document or genealogy software program such as Legacy or Roots Magic.

Searching

- Search for a word or phrase through all notebooks, including text in photos and documents, including PDF’s.

Printing

- Print a page, section or an entire notebook. By printing to PDF, you can create a PDF copy of the entire notebook

Sharing

- Share a notebook with friends, family, etc. You can enable them to edit or just view the notebook.

The Elephant in the Room – comparing OneNote to Evernote – OneNote and Evernote are both popular note-taking applications. Both offer free options. However, Evernote now requires a paid subscription (\$7.99 per month) for features such as forwarding emails to Evernote and searching text in PDF's and Office documents. The free version of Evernote limits the user to two devices. These features are available without charge in OneNote. OneNote does charge for extra storage. The first 5 gigabytes (gb) of storage on OneDrive is free. (This is probably enough storage for most people's use of OneNote.) You can increase to 100 gb for \$2/month. For \$6.99/month you can get an Office 365 subscription, which gives you access to the latest version of the complete suite of Microsoft Office applications (Word, Excel, Outlook, etc.) PLUS 1 terabyte (tb) of OneDrive storage. For \$9.99/month you get the same suite for up to 6 family members, including 1 tb of OneDrive storage for each family member. (Dropbox recently increased its fee to \$11.99/mo for 2 tb of storage space.)

Suggestions for using OneNote for Genealogy

- Archive a research project, such as an application to a lineage society
- Planning a research trip
 - If you are researching in a new county, make a list of research locations, including addresses, hours of operation, etc. You can include a map. This is great if you have OneNote on your phone.
 - Examples of locations could include the court house, library, genealogical society, cemeteries, etc.
 - Make a list of what you are looking for at each location.
 - If you take pictures with your phone, you can save them in this notebook. You can edit and move them to another location later.
 - Other relevant information from places like the county page from the FamilySearch Wiki.
 - Notes on what you found or didn't find.
 - Ideas for future research,
- An ongoing research project – such as a brick wall. Include notes, to-do lists, etc.
- Whatever you would put in your 3-ring binder

Remember, you can quickly search through all the text, including your notes, text in photos, images from pages such as Find-a-Grave, and text of multipage documents, including PDF's.

OneNote Online Resources

Note: Given the length of some of the links below, it may be easier to use a downloaded version of this handout, in which the links will be active – click on to open. You can get this either from the handout downloaded from your FSGS member link or by going to:

<http://bobsqgenealogyquest.com/onenote/>

Helpful Video Links:

Sign up for Microsoft OneDrive account: <https://support.office.com/en-us/article/video-sign-in-or-create-an-account-for-onedrive-personal-6c63b4e3-c92f-4f52-80e2-237c798cec1e>

Other OneNote Tutorials

OneNote for Windows 10 Help <https://support.office.com/en-us/article/onenote-for-windows-10-help-02f3955f-a1df-4458-9724-b8cc0b4d5437>

Get Started with the new OneNote <https://support.office.com/en-us/article/get-started-with-the-new-onenote-ab84fcc2-f845-41ac-9c29-89b0720c8eb3>

OneNote Video Training <https://support.office.com/en-gb/article/onenote-video-training-1c983b65-42f6-42c1-ab61-235aae5d0115> Several short videos from Microsoft on using

OneNote for the Mac Help https://support.office.com/en-gb/article/onenote-for-mac-help-4cc04128-ca22-4f55-a496-cd3ff93e37db?wt.mc_id=otc_onenote&ui=en-US&rs=en-GB&ad=GB

YouTube Videos

Microsoft OneNote - 2018 Detailed Tutorial – from Teachers’ Tech. Demonstrating OneNote for Windows 10. <https://www.youtube.com/watch?v=zjfIMCRJUAo>

OneNote for iPad Tutorial - With Tips and Tricks - from Teachers’ Tech. Demonstrating OneNote for the iPad <https://www.youtube.com/watch?v=Ozk7XneV5Jc>

Webinar

Using OneNote With Your Genealogy by Tessa Keough, January 23, 2019

https://familytreewebinars.com/login.php?webinar_id=884 (This is in the subscription section of Legacy Family Tree Webinars.) A very detailed explanation and demonstration.

Facebook Groups

<https://www.facebook.com/groups/OneNoteGenealogy/> - ask to join group

Search for other OneNote groups on Facebook

You can check for updates to this handout and find additional resources by going to

<http://bobsqgenealogyquest.com/onenote/>.