

---

# Using OneNote To Organize Your Family History—It's OneTastic!

*Presented by Brandi Burns*

OneNote is a digital notebook that goes wherever you go. It lets you capture your ideas, to-dos, files, articles, photos and more in one place.

In this workshop we will examine OneNote basics, how to set up your notebooks for family history, and how to use the program's powerful functions during online research. We will also look at how to use the program on the go when we only have access to our tablets or phones.

## Workshop Objectives

<i>Getting Started</i>	<i>Building a Genealogy Notebook</i>
Overview of OneNote functions & creating a notebook	One ancestry line notebook vs. Master family notebook
Sections, section groups, pages & other tips on organization	Saving research in your notebook & using your notebook as a research tool
OneTastic Macros for increased functionality	Printing, exporting, & saving your notebook in the cloud

*OneNote is an excellent tool to keep your family history organized and available to you wherever you may be.*

---



---

## Class Outline & Introductions

Hi! My name is Brandi Burns and I'm excited to share with you how to use OneNote to organize your family history.

I have a Masters of Applied Historical Research from Boise State University and I'm the History Programs Manager for the Boise City Dept. of Arts & History.

I became a OneNote enthusiast after dating several note-taking applications and software that fell short of my expectations. I use OneNote to stay organized at work, in my hobbies, and most importantly, in my family history research.

---

## Class Outline

### Welcome & Introductions [2 minutes]

### Getting started with OneNote [10 minutes]

What is OneNote?  
Overview of functions & where all the buttons are  
OneTastic Macros

### Setting up a genealogy notebook [10 minutes]

Creating a notebook  
Sections, section groups, pages  
Organization hierarchy

### How to build your notebook [15 minutes]

How to pull in documentation from FamilySearch, Ancestry, & elsewhere  
Research log & to-do list  
Importing photos & documents  
Printing & exporting pages, sections, or entire notebooks  
Sharing your notebook with others

### Field access [10 minutes]

Saving your notebook to the cloud  
Downloading OneNote App—pros & cons of app

### Questions [approx. 10 minutes]



---

# Sneak Preview: Set-Up

## Get Started With OneNote:

---

**Open a new notebook:** File › New › Choose where you want your notebook to be created (OneDrive or Computer) › Follow the prompts for the location you choose. (FYI: Notebooks that you currently have open appear in the Notebook list, which you can view by clicking the arrow next to the name of your current notebook)

**Create sections:** Right click any existing section tab in your notebook, and click New Section. Type a description and press Enter.

**Create new pages:** On the right side of the window, over the column of page tabs, click Add Page. Type a page title into the heading area at the top of the page, and then press Enter.

---

## Build a genealogy notebook:

---

**Decide** if you want one notebook per ancestral line, or a master family notebook (we'll go over how I set up my personal genealogy notebook).

**Save** research in your notebook—

- Use the OneNote web clipper (<https://www.onenote.com/clipper>) or use the "send to OneNote" function (Print › Select printer, in this case "Send To OneNote" › follow prompts to select what notebook, section, and page you want the material sent to). "Send To OneNote" works well for saving email, web pages, etc.
- Insert a file (document or image) into OneNote. **Attach a document or file:** Insert › Files › Choose a file or set of files to insert › click Insert. Insert a document or file as a printout: Insert › File as Printouts › choose document to insert.
- Create a research log to track what sources you have used and what questions you are trying to answer/have answered. We'll go over a template in the workshop.
- Create a to-do list to keep track of what other records you would like to search or what other tasks you need to complete.

**Use OneTastic Macros** to increase OneNote's functionality. We'll demonstrate and use a select few of awesome macros during the workshop. Explore the many macros available at: <https://omeratay.com/onetastic/>.



---

# Resources

OneNote download: <https://www.onenote.com/download>

OneNote Web Clipper: <https://www.onenote.com/clipper>

OneTastic Macros: <https://omeratay.com/onetastic/>

OneNote blog: <https://blogs.office.com/?filter=true&filter-product=onenote>

OneNote featured apps: <https://www.onenote.com/apps>

There are many videos online demonstrating various versions of OneNote, as well as “how-to” articles. Google “how to use OneNote” and several videos and articles will appear in the search results.

If you require assistance after the workshop, please email me at **[brandiburns1@gmail.com](mailto:brandiburns1@gmail.com)**