

EVERNOTE for Genealogists

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What is Evernote?

Evernote is a wonderful tool for the genealogist. It can easily collect your thoughts for a research plan, organize your research findings, and store most anything that is digital. It then organizes them into a filing system using a number of tools that make it simple to retrieve at will. Your information can be aggregated in ways that make it easier to infer family connections and reach genealogical conclusions. Evernote operates on the cloud and secures all your information through encryption and backups. The information is available to you everywhere on every device including the internet. It allows you to share and collaborate with others. This feature-rich program used by over 10 million subscribers is available for free.

Download Evernote at <http://evernote.com>

Evernote Devices & Platforms

For Computers	For Mobile Devices	Browser Extensions
Mac OS X	iPad, iPhone, iPod Touch	Chrome
Windows Desktop	Android	Safari
Windows 8 (Touch)	Windows Phone	Opera
	Blackberry	Firefox
	WebOS	

Evernote Free vs. Premium

Free	Premium
Free	\$5 per month, \$45 per year
Unlimited storage	Unlimited storage
Monthly uploads of 60 MB per month	Monthly uploads of 1GB per month
Maximum file size for a single Note, 25MB	Maximum file size for a single Note, 50MB
Searches within text and photos	Plus searches in PDFs and Office documents
	Note history
Online Notebooks only	Take an entire Notebook offline when you don't have a network connection
Shared Notebooks are read-only	Allow others to edit your Notes
Advertisements	No ads
	Faster image recognition
	Add pin lock to iOS and Android devices

Notes

Evernote calls any information item a “Note.” It can be a video clip, audio clip, scanned image, photograph, PDF document, word document or any other digitized item. Evernote does not distinguish Notes based on the software that created them. It stores Notes as images, PDFs, or audio/video files. All images that contain text are scanned and any text is made searchable. Text documents are converted to searchable PDFs. Notes are easily found with one of the several search methods offered by Evernote.

Organization

The primary strength of Evernote is its ability to find all your Notes. Notes are organized in a structure of Notebooks and Tags.

Notebooks are the highest organizational level for filing your information. You can create these any way you wish but they should be high level such as Names, Places, Genealogy, etc. Notebooks are key because you can search, collaborate, and share them. They can be further subdivided by creating “Stacked Notebooks.” Searching within Stacks is also possible but you can’t share them.

Tags offer a second method of identifying your Note content. Tags are independent of the Notebook structure and can be applied across Notebooks. These are the genius of Evernote. You can apply up to 100 tags to a single Note to describe and search for it. However, it’s best to limit yourself to two or three. Tags can identify record types, dates, places, or most any characteristic of the Note. You can search on Tags across all Notebooks or combine the search to only search for Notes within a specific Notebook. Tags are very versatile and broaden the search capability enormously.

When setting up your personal organization scheme, think of how you want to search your Notes and set up your Notebook and Tag structure accordingly.

Searching

Searching by Notebook and by Tag are not the only tools available. Evernote also searches by keywords, creation date, author, location, and full text. Keywords include words in the title, keywords imbedded in a document and words appearing in any text on an image. A good practice is to describe the contents of a Note in its Title. Evernote will even search on words in a voice message.

Keywords are entered into the search box located above the Note listing. As you type the word, Evernote begins to list the search results. Evernote also uses operators to fine-tune a search. You can also use Boolean searching and wildcards. A list of all search methods and operators can be found at <http://www.makeuseof.com/tag/20-evernote-search-features-you-should-be-using/>. Searches that you repeatedly use can be saved and reused.

Getting your Notes into Evernote

There are several options for entering your Note into Evernote. You can:

1. Type a Note.
2. Copy and Paste a Note.
3. Drag and Drop a Note.
4. Email a Note.
5. Scan in a Note.
6. Photograph a Note.
7. Capture a Tweet
8. Dictate a Note
9. Clip the web

Resources

The Evernote Trunk is the place to start. It offers books, tools, apps and other materials helpful to Evernote users. It can be accessed from within Evernote or at <http://trunk.evernote.com>.

Numerous tutorials are available on YouTube. Go to www.youtube.com and enter "Evernote genealogy" in the search box. You can also search in Google under "Evernote genealogy" and you will find many helpful articles.

Helpful Books:

1. Murray, Katherine. *My Evernote*. Indianapolis: Que Publishing, 2012.
2. Kelly, Brett. *Evernote Essentials, 3rd Ed.* 2013. PDF Download. *Author Online*. <http://NerdGap.com> : 2013.