

Evernote for Genealogists

Evernote - Free program; Premium version (\$5 per month) offers more storage & more options

Collects information the way you think..

Gathers text, image, web page, URL, audio, video, etc

Works best with combination of smartphone / tablet and desktop program

Everything you collect in Evernote will be backed up “in the cloud” on the Evernote site, so it can be accessed from anywhere you have internet access. It is also synched [either on demand or on a schedule you set], so can be used from smart phone, tablet, notebook computer - anywhere you’ve installed Evernote.

Works with

Computers - PC or Mac

Browsers - Chrome (best), Firefox, Safari, Explorer (some features don’t work as well with Explorer)

Smart phones - iPhone, Android, Blackberry, Windows phone

Tablets - all

For desktop, download for your browser from www.evernote.com

For smartphone or tablet - Get from Google Play Store, Itune Store, etc.

Collect any type information by:

typing it in

cut & paste

taking a picture with phone or tablet

audio recording

web cam recording

clipping -a web page; an image; selection; URL [the URL is saved with the clipping]

scanning

emailing to your Evernote address

drag & drop attachment or file

Data is arranged by notebooks - which you set up to your taste or to suit the way you think.

Start by creating notebooks that you think you’ll need.

Add new notebooks at any time. [File, new notebook] or right click on “notebooks” in left panel and “create notebook” or shortcut is “insert” key

Store data in notebooks as you acquire it; or move into notebooks later (drag & drop or right click, “move”)

Notebooks

can be shared - either made public or shared with specific people

can be “stacked” by dragging one into another - i.e. Genealogy with sub-notebooks for family names

can be renamed or deleted when no longer needed

can be linked - a link to one placed into another

Web Clipper - Probably most useful feature for genealogists

Does not work with *images* on FamilySearch

Works differently depending on browser - and yours may be different from these...

With Firefox, right click on page or image, select “add to Evernote” - then select page, image or URL.

With Chrome, right click on page or image, select “Web Clipper” - then select page, image or URL.

With Explorer - right click, then “clip this page” or “clip URL”

Icon will appear saying “clipping”, then an icon in lower right with elephant with “clipped note”. Click on that to see note. It will have been saved to your default folder.

Name of the folder will be in top right corner; change folder (pull down menu) to put it into different folder

You can move it into another folder at any time.

That note is now saved on your computer as well as on the Evernote site. Click F9 or Tools, synch to have it go to all your devices. Set up (settings) how often to synch automatically.

To add other notes, click on the Evernote  icon [green elephant], on your desktop, start menu or task bar.

There will probably be 3 panels showing - a list of notebooks, a note list & a note panel.

If not, click on view at the top and check those you want to see. Select list, snippet or thumbnail for the notes list.

Using Evernote on your desktop:

- Click “new note” to add another note. Use the drop down menu arrow to select the input method.
- Click “share” to send the note via email, to social media sites or to copy to clipboard
- Click “synch” to have your notes synched immediately to all your devices
- Click “usage” to see how much you’ve used - the free account is allowed 60 MB per month
- Click “print” or “delete” as needed.

To access the notes you’ve saved,

- Look at the left panel for notebooks or the middle panel for specific notes.
- Select a notebook at the top to look at notes for that notebook; “all notebooks” to see everything
- To move a note from one notebook to another, drag the note to the proper notebook or right click, then “move”
- Right click on any note for more options

Add tags to notes to make searches easier.

- Select the note in the notes list, then click “tags” to select from list of tags or add new one.
- Or, right click on note, then “add tag”.

Use formatting options to format your notes.

- Use check boxes to make “to do” list
- Take advantage of bold, italics, strike through, colored text, tables
- Change font size to increase readability
- Right click on notes to see word and resource count.

Search notes

- Use search box in “notes list” (middle panel) to search specific notebook - or all notebooks
- Search will find word in title of note, tags, text or often text in an image

To use Evernote on mobile devices (smartphone, tablet, etc). Open the Evernote app, then:

- Use the camera on your device to copy documents, photos, etc.
- Record a note using the audio recorder
- Use speech to text on Android devices
- Use webcam to record interviews, etc.
- Access everything you have saved to Evernote

At anytime, go online to Evernote.com to see your files

- Sign in with your email and password

There is an option to encrypt specific data - requiring a password to view.

Evernote accessories: Clearly (removes excess on webpage); Skitch (lets you mark up photos) - do not work with Explorer

See videos about Evernote at:

- Basic Evernote tutorials (6 parts): Kent Sanders on YouTube -
<http://www.youtube.com/watch?v=jKdJGUMjOUs>
- Evernote for Genealogy: <http://fiddlerstudios.com/evernote/> (Specifically for genealogy)
- Evernote Tips: The 11 Amazing Features: http://www.youtube.com/watch?v=Ce2_gWZHBI8

Articles:

- Evernote for Genealogists*: <https://familysearch.org/techtips/2012/02/evernote-genealogists>
- How to Use Evernote for Genealogical Research*: blog.evernote.com/blog/2012/11/19/how-to-use-evernote-for-genealogical-research/
- Evernote for Genealogy: http://www.rootfindersgr.com/wp-content/uploads/2012/06/HopkinsArnold_Evernote_FamTreeExpo_20121.pdf
- The Total Recall Research Log Evernote. FGS Forum*, Winter 2011: http://www.fgs.org/upload/FGS_FORUM/V23N4_Winter_2011.pdf