



Evernote for Genealogy

Rochester Genealogy Society – Computer Interest Group

<http://nyrgs.org/>

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The slides of this presentation will be available on the RGS website.

Evernote

Evernote is a suite of software and services, designed for notetaking and archiving. A "note" can be a piece of formatted text, a full webpage or webpage excerpt, a photograph, a voice memo, or a handwritten "ink" note. Notes can also have file attachments.

[Evernote - Wikipedia, the free encyclopedia](#)

en.wikipedia.org/wiki/Evernote

Evernote Competitors

(Currently Evernote has about 80 million users - more than its competitors)

<http://simplenote.com/>

<https://keep.google.com/>

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

...or you could "roll your own" by using a clipping tool and a cloud repository like dropbox

Why Use Evernote or a Competitor?

- Your content will be searchable, including text in PDFs and images and even some handwriting.
- Your content can be accessible from any device in any location.
- Can be viewed as a backup of your materials.
- Aids your research - can prevent info from being lost or forgotten.
- Paperless genealogist - oxymoron or not?

What's it cost?

Evernote is free at <https://evernote.com/>

Evernote Premium costs \$5 per month or \$45 per year

- Enhanced search features

- Offline access to notes on mobile devices

- Notebooks can be shared

- More info about Premium is coming...

Evernote is available for the following platforms:

- Microsoft Windows
- Mac OS X
- Chrome OS
- Android
- BlackBerry OS
- BlackBerry Tablet OS
- iOS
- webOS
- Windows Mobile
- Windows Phone

Resources

- https://evernote.com/getting_started/
- ["Evernote for Genealogy: The Foundation of My Research Organization System"](#) by Colleen Greene
- <http://michaelhyatt.com/evernote-tags.html>
- "Evernote for Dummies" by David E. Y. Sarna with Vanessa Richie
- <http://blog.evernote.com/>
- <http://www.cyndislist.com/evernote/how-to/>
- <http://youtu.be/lZfkiYaRpRI> youtube series
- At www.youtube.com & www.google.com search on *evernote genealogy*

Where's My Stuff?

Evernote saves your "notes" in the cloud (on Evernote servers) and therefore they are accessible & synced from all of your devices.

- "Thick clients" like PCs & Macs have local copies of your content that are synced with the cloud.
- "Thin clients" like tablets & mobile devices do not have local copies.
 - A Premium feature allows offline copies to reside on your mobile devices.

Worthwhile if you have only 1 device?

Does it make to sense to use Evernote if you have only 1 device?

YES

I will begin describing usage assuming you have 1 device (& internet access).

Basic Components

- Note - basic item to be stored
 - (clipping, note from scratch, file - text, image, audio)
- Notebook - container for your notes (a note can be in only 1 notebook)
 - Stack/Parent Notebook - a hierarchy of notebooks can be created in a Stack
 - Notebooks can be shared (\$)
- Tag - keywords you assign to a note (provides searching capability)
 - Parent Tag - a hierarchy of tags & sub-tags can be structured under a Parent Tag.

Ways To Create a Note

- Clipping using Web Clipper
 - For IE, Web Clipper is included with Evernote
 - For others, download browser-specific Web Clipper at <https://evernote.com/webclipper/>
- Create a note from scratch
- Scan - many scanners can be setup for Evernote
- Drag a file to the Evernote icon - text, pdf, image, audio.
 - Premium version allows dragging any file format

More Ways To Create a Note

- Can create an audio note with any device with a microphone. Using an app like Voice2Note, can create a searchable note from the audio file.
- Email - all evernote users receive an evernote-specific email
 - append to subject - @notebook & #tag
- Paste contents of the clipboard to a new note (Ctrl + Alt + V)
- Print to a File can be setup for Evernote

More Ways To Create a Note

- Photos from cameras & smart phones can be setup for Evernote. Text is will be indexed.
- ***Auto Import Folders can be setup. When a file is created in this folder(s) on your local computer, it is automatically imported into Evernote.
 - Windows, <https://evernote.com/contact/support/kb/#/article/23186693>
 - Mac, <http://www.documentsnap.com/evernote-mac-import-folder/>
- Kindles & Nooks can be setup for Evernote
- Merge notes with similar content

Naming Conventions for Notes

- If you have a convention that you follow now for your non-Evernote files, you can use that.
 - It's usually helpful to name like items so alphabetically they will be listed together.
- For family related notes, you may want to do something like:
 - Last Name, First Name, Year, Record Type
 - Ex., Hogan John 1880 Census
- For location related notes, you may want to do something like:
 - Country, State, County, Town, Subject
 - Ex., USA NY Ontario Gorham - Pioneer Cemetery
 - Ex., IRL Clare Ennis - Library
- For already named items, interject your naming convention prior to the assigned name.
 - Ex., USA NY Ontario Gorham - History of Bethel Baptist

Notebook Strategy

- You could design your Evernote notebooks to echo your physical notebook and/or folder structure.
- *Genealogy Issue:* Where do you put an item that is relevant to multiple notebooks/folders? Do you make multiple copies?

Notebook Strategy

- An Evernote note can be saved to only 1 notebook!
- Some benefits:
 - No redundant notes
 - Quicker searches
 - When a note needs to be updated, you only have to update in 1 place

Notebook Strategy

- Some genealogists who are experienced Evernote users recommend using a “minimal” notebook structure.
 - See the Colleen Greene & Michael Hyatt articles on the Resources page.
 - Colleen Greene does NOT create “surname-specific, location-specific, record-specific, or task-specific Notebooks.”
- Possible Notebook structure:
 - Inbox (notes awaiting processing - naming, tagging, etc.)
 - Genealogy Research Notebook Stack
 - Genealogy Research FamilyA
 - Genealogy Research General
 - HobbyB
 - Household Stuff

Notebook Strategy

- Notebooks can be shared (Premium feature). You might create a notebook or sub-notebook for a project to collaborate with another family member.
- Notebooks can be declared as:
 - local (only available on your local computer)
or
 - synchronized, the norm.

Tag Strategy

- Colleen Greene uses tags to label such items as surnames, locations, record types, or tasks:
 - Surname (Parent Tag)
 - Hogan
 - Dawson
 - Location (Parent Tag)
 - USANYOntarioGorham
 - IRLClareEnnis
 - RecordType (Parent Tag)
 - Census
 - Church
 - Tasks (Parent Tag)
 - Verify
 - Research
 - Obtain

Tag Strategy

- There is a school of thought that says, since Evernote indexes your content, you only need to use tags for terms not in your note.
- The risks of not tagging:
 - What if the Evernote indexing makes a mistake or omission?
 - What if you don't know (or choose) the "right" term to search

Browsers

- Web searches with Evernote-supported browsers can simultaneously search your Evernote notebooks.
- Evernote-related extensions for your browser can be found at:
 - Firefox, <https://addons.mozilla.org/en-US/firefox/>
 - Chrome, <https://chrome.google.com/webstore/category/apps>
 - IE, <http://www.iegallery.com>
 - Safari, <https://extensions.apple.com/>

Add-on Apps

- <https://appcenter.evernote.com/>
- Web Clipper
- Voice2Note
- ...many others

Premium Features

- 1gb upload per month (vs 60mb)
- Unlimited size of notes (vs 25mb per note)
- Full text search: office docs, pdf, images
 - Pdfs are searchable (\$)
- Notebooks are accessible off-line on any device.
- Notebooks can be shared
- View note history including versions

Usage for multiple devices

A major selling point for using Evernote is that your content is in the cloud and therefore available to you on all of your devices.

Usage for multiple devices

- Evernote Web, guide at <http://evernote.com/evernote/guide/web/>
- Evernote for Windows & Mac, guides at <http://evernote.com/evernote/guide/windows/>
<http://evernote.com/evernote/guide/mac/>
- Evernote for tablets & smart phones, guides at <http://evernote.com/evernote/guide/android/>
<http://evernote.com/evernote/guide/ios/>

Usage for cameras

- Eye-Fi
 - Wifi-enabled SD memory card
 - Camera stores the photos on the SD card
 - Using wifi, automatically sends photos to Evernote
 - No wifi access where you're taking photos?
 - When you do have wifi access, turn on your camera and the pictures will be uploaded.

Hesitations

- This seems too complicated!
 - Suggestion: Take a look at the first bullet on the Resources page. Just follow the steps and give it a try.
- I have too much stuff - I'll never get it all into Evernote!
 - Suggestion: Take Baby Steps. Beginning today, put all new things into Evernote. Then gradually work at converting your most important and most frequently accessed items.