

# Using Evernote as Your Primary Tool for Capturing Notes and Ideas

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## 1. Create your free Evernote account:

- Go to [evernote.com](http://evernote.com)
- Enter:
  - i. your email address
  - ii. a password to use with Evernote (preferably a password different from the one you use with your actual email account)
- Click the green Sign Up button.
- Evernote will give you the option to download the desktop app and the Evernote Web Clipper for your browser. (You can do these later.)
- Click the “Create your first note” button.
- Evernote will display an empty note in a default notebook called “First Notebook”.
- A Welcome message will be emailed to your email address. It will contain a link that can be used to download the Evernote app for your computer.

## 2. (Optional but highly useful) Install the free Evernote app on any and all of your personal devices where you plan to use Evernote:

- desktops/laptops: Windows and OS X
- tablets/smartphones: iOS, Android, Windows

## 3. (Optional but highly useful) Install the Evernote Web Clipper browser extension in any of the following browsers you use on your personal Windows or OS X devices:

- Internet Explorer (already installed if you install the Windows Evernote app)
- Safari (already installed if you install the OS X Evernote app)
- Google Chrome
- Mozilla Firefox
- Opera

#### **4. Kinds of stuff you can put into Evernote:**

- Typed notes
- Handwritten notes (searchable)
- Audio notes
- Photos (any legible text is searchable) – these could be existing photos that you upload from your device or new photos that you create with your device's built-in camera
- PDFs
- Email (Evernote Plus/Premium users - forward to your private Evernote email address) – this can include attachments
- URLs
- Web pages (or articles within web pages) – you can edit out the stuff you don't want to keep

#### **5. How stuff is organized within Evernote:**

- Notes
- Notebooks (multiple notes) – one notebook is your default notebook
- Stacks (multiple notebooks)
- Tags
- Shortcuts

#### **6. Create new notes, notebooks, and stacks:**

- Create a new note by clicking the “+ New Note” button
- Create a new notebook by clicking the dropdown menu next to “**Notebooks**”
- Create a new stack by dragging one notebook on top of another

#### **7. Name/rename notes, notebooks, and stacks:**

- Name notes, notebooks, and stacks when they are created
- Edit a note and click at the top of the note to rename it
- Right-click a notebook/stack or use the associated dropdown menu to rename it; you could name your default notebook “Inbox” or “To be filed” (You may want to make the default notebook a Shortcut.)

#### **8. Add tags to notes – for genealogists, this might include:**

- Surnames (some genealogists create a unique tag for each ancestor)
- Locations
- Document or event types
- Misc. important tags

## **9. Delete unneeded notes, notebooks, and stacks:**

- Right-click a note in the list of notes or use the trash can icon to delete it
- Right-click a notebook/stack or use the associated dropdown menu to delete it

## **10. Creating/editing typed notes:**

- Use fonts, font sizes, colors, bold, italics, underline, superscript, subscript
- Use indentation, left-adjusted text, centered text, or right-adjusted text
- Use numbered or bulleted lists
- Use checkboxes (ideal for research to-do lists)
- Use tables and horizontal rules
- Attach one or more files
- Set a reminder to be associated with the note (ideal when combined with to-do lists)

## **11. Share notes via:**

- Facebook
- Twitter
- LinkedIn
- Email
- Link

## **12. Limits:**

- unlimited total storage
- 100,000 notes
- 100 tags per note
- 100,000 tags per account
- 250 notebooks
- 100 saved searches
- 250 shortcuts

### **13. Consider upgrading from Evernote Basic to Evernote Plus or Premium:**

- \$24.99/year (Plus) or \$49.99/year (Premium)
- Monthly uploads: 60 MB (Basic), 1 GB (Plus), 10 GB (Premium)
- Maximum note size: 25 MB (Basic), 50 MB (Plus), 200 MB (Premium)
- 200 emails/day into Evernote Plus or Premium (not available in Basic)
- Offline access to notes using mobile app
- Files are OCR'd faster
- Scan business cards (Premium)
- Search inside PDFs, Microsoft Office files, and other attached files (Premium)
- Annotate attached PDFs (Premium)
- View related content (Premium)
- Passcode lock available for mobile app
- See past versions of notes (Premium)
- Use Evernote in Presentation mode
- Highest level of support from Evernote staff

### **14. Forwarding or sending email to Evernote (Evernote Plus/Premium users):**

- Create a contact called "Evernote" in your various email clients so that you can easily send email to Evernote
- Use your email client's filtering options to automatically forward certain items to Evernote
- Add tags by putting #tag1 #tag2 (etc.) in the subject line
- Direct to other than the default notebook by putting @notebook in the subject line (if you do this, it needs to go before the tags)
- Do any other editing of the subject line to make the email message more findable once in Evernote

### **15. For more information:**

- *How to Use Evernote for Genealogy* by Kerry Scott (published in 2015 by Family Tree Books)
- *Evernote Essentials: The Definitive Guide for New Evernote Users* by Brett Kelly (4<sup>th</sup> edition published in 2013)
- *Evernote Genealogists* Facebook group:  
[www.facebook.com/groups/evernotegenealogists/](http://www.facebook.com/groups/evernotegenealogists/)
- *Evernote in Genealogy* Google+ community:  
<http://plus.google.com/s/evernoteingenealogy/communities>

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