

Using Evernote to Improve Your Research

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Evernote Basics

Evernote is a repository for *everything* related to your research. Everything goes together, and it's searchable so *you don't have to be organized*.

Notes are gathered into Notebooks; Notebooks are gathered into Stacks. Individual notes can contain anything—text, tables (like a research log), clippings from the web, images, and audio files (like interviews with relatives). There are no separate file types.

Evernote syncs across all devices, so for best results, install it on every device you have.

You can use tags to make things easier to find (but you don't have to).

Check your favorite browser's plugin/extension page for a variety of useful Evernote tools (including the Web Clipper, which allows you to clip anything in your browser and save it to Evernote).

If you have a tablet, you can use an app like Penultimate to allow you to hand write notes using a stylus, then save them to Evernote.

Using Your Evernote Email Address

Log in to your Evernote account.

Click your name (at the top right on a PC; top left on a Mac).

Click Account Info. You'll see your special Evernote email address listed.

Use your Evernote email address to send yourself information whenever you like. Forward important cousin correspondence for safekeeping, or your favorite genealogy blog posts or newsletters. Forward your confirmation emails for research trip hotel and airline reservations. Everything you send will be searchable and easy to find.

Benefits of a Premium Subscription (\$5/month)

Accessing notes on devices where you have no internet connection

Better collaboration—you can invite cousins to share and edit notes, and access the Note History to see what's changed

1GB of monthly upload capacity (if you need more in a given month, you can buy an extra 1GB for another \$5)

Better search capabilities—you can search inside PDFs and images with text (like obituaries or vital records)

How to Capture Documents and Create Citations

1. Open the Evernote app on your tablet or smartphone, then click the Camera icon. It's the second icon from the left on the most current version of the Evernote app.
2. Aim at the document you need to capture, allow the auto-focus to operate for a second or two, then take the photo. Evernote has different options at the bottom—Post-It Note, Photo, Document or Business Card—but for most genealogy-related applications, you'll see the best results on the Photo setting.
3. Once you've taken the photo, a checkmark appears in the lower right corner of the screen. Click it.
4. Click the link titled "Snapshot" that's at the top of the Notes list. The snapshot you took most recently will always be at the top of the list.
5. You'll see the photo you just took. Check to make sure it's not blurry. Scroll down and type your source citation and any other relevant information at the bottom. If you want to title your note, click next to the word "Snapshot" at the top, then use your backspace key to change the title of the note itself to something more descriptive. When you're done, click the elephant in the top left corner to go back to the main screen. Each of your images with citations will be a separate note in your Evernote file.

How to Annotate or Crop Images

Open your desktop version of Evernote. Check to make sure your file has synced, and that the images you created on your tablet or smartphone have uploaded to your desktop version. If they haven't, click the Sync icon at the top to sync your file.

Open the note that contains the image you wish to work with. Place your mouse cursor over the image itself, then right-click. Choose "Annotate this Image" from the menu that appears.

Your image will open in a new window, and an icon menu will appear on the left side of your screen. Hold your mouse cursor over each icon to see a short description of what function it provides. You can add text or shapes, draw anything you like, or add stamps with arrows pointing out key items. You can pixelate (blur out) portions of the document, which is helpful if you're working with something that contains information about living people. You can also use the cropping feature to select only the part of the document you need, which is particularly useful for smaller newspaper articles that are surrounded by irrelevant text. If you make a mistake, click Control-Z (Command-Z on a Mac) to undo. If you're cropping the image, be sure to click "Apply" to save your crop.