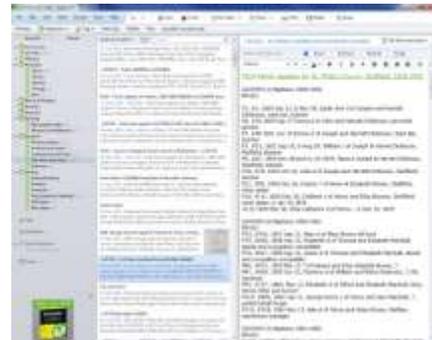


# Using Evernote as Your Genealogy Research Assistant

When you finally find a moment to sit down to do some genealogy research, are you surrounded by stacks of papers to be filed, sticky notes and print outs of important research materials? Do you arrive home from the library or an archive visit with a briefcase full of research guides, document copies and hand written notes that just never seem to get filed and sorted? Or is your desk neat and clear and all your notes and information neatly filed and instantly accessible?



**OR**



*Perhaps you need a research assistant like mine. I use Evernote.*

Evernote can hold all your written or typed notes, important emails, images, scanned documents, photos, audio and video clips. Evernote allows you to access all of your information from anywhere. Evernote helps you find information your information with tag and keyword searches.

## Getting Started with Evernote

### **Create an Account**

Go to [evernote.com](http://evernote.com) and click "Create an Account" at the top right hand side of the page. Fill in your email address, a username and a password. Complete the captcha on the screen and wait for your confirmation email. The Evernote Data Protection policy reads: Your data is yours, protected and portable. Creating your account could not be easier.

### **Download Evernote and Install**

Evernote is available for Windows and Mac and for your smart phone and tablet devices running Android, iOS, Blackberry and Windows 7. Linux users should search for the open source program Nevenote to access their Evernote account. Download Evernote and install it on all your devices and sign into your account.

### **Evernote Web Clipper**

Whether you use Internet Explorer, Google Chrome, Firefox or Safari, you should install the appropriate web clipper tool. You can find the appropriate tool by clicking on the "web clipper" icon on the [evernote.com](http://evernote.com) home page.

### ***Creating your First Notebook***

Begin by creating a notebook for each of your family lines. After creating the notebooks, right-click on the first notebook and select “Add to Stack” and “New Stack”. This will put your family folder under a notebook stack called “Notebook Stack”. Add your remaining family folders to this stack. Now right click on the “Notebook Stack” folder and rename it #Families. Placing the # symbol in front of the word Families will ensure that this notebook stack always is at the top of your notebook listing. As you use Evernote, you will probably create other notebooks and notebook stacks to organize your notes.

### ***Creating Notes***

Now that you have some notebooks, it is time to start creating notes. New notes can be created with the new note command. Notes can be typed. They can be images or files or can be created from material clipped from the web using the web clipper you installed in your browser. Web clippings can be of the entire page, selected text, or just the URL of the webpage. Other types of notes can be written or drawn (new ink note), spoken (new audio note), or filmed (new webcam note). Unless you have chosen to create a local only notebook, all of your notes will be uploaded to Evernote and will be synchronized on all your computers and devices that have Evernote installed on them.

### ***Tags***

Tags make it easier to find your notes. They can be surnames, places, subjects or whatever helps you organize your notes. Tags can also be used to track the status of the material in your notes. For example, when you find an index entry for a probate record, copy the information and tag the note “Will-to-find”. Later, when you have located and received a copy of the actual will, change the tag on this note to “Will-found”.

### ***Emailing Notes***

Notes can be emailed to Evernote. Click on the “Usage” icon on your Evernote toolbar to find your personal Evernote email address. You can assign emailed notes to specific notebooks and tag them with existing tags by including the notebook name and tag in the subject line. For example, if you’ve received an email from a distant cousin about the birth information for your shared ancestor John Smith, you could forward this email to your Evernote address with a subject line of “John Smith Birth @Smith #BC-to-order”.



Create a new notebook called Inbox as your default notebook. Any notes that are created from your smartphone, forwarded via email or captured via your web clipper without being assigned to a specific notebook will show in this notebook and can be dragged to the appropriate notebook and tagged appropriately later.

## Visiting the Archives with Your New Research Assistant

Imagine that you are planning your first research trip to the local archives. Visit their website and find the section relating to visiting the archive. Create notes for such things as opening hours, archive rules and regulations, public transport and parking information, directions and maps. Next, go to the archive's online catalogue and search for records that might be of interest. Clip each possible catalogue entry to a note using your web clipper and tag the notes "Records-to-find". Some records that you want to see may need to be ordered in advance. Fill in an online "request for retrieval" and create a note from the confirmation. Find the section on the website for research aids or guides and create notes for those of interest.

From your genealogy software, run reports on the families that you are going to do research on. Save them as notes in Evernote.

If you are travelling to the archives by train or bus, add your e-ticket to Evernote along with your hotel confirmation and any other travel documents you may have. Use an online mapping website such as Streetmap or Google Maps to find directions for your trip to the archives and clip them into Evernote. Create a note with a checklist of things to pack and use "Control-Shift-C" to add check boxes to your list. Check each item off as you pack it. Before you zip up your suitcase, create a photo note of its contents just in case it is lost or stolen.

When you arrive at the archives, you may be directed to a cloakroom where you can store your personal belongings in a locker. Take a photo note of your locker number. You may want to use your smart phone or tablet to create a brief video clip note of the lobby area to commemorate your visit to the archives.

Now you are in the reading room at the archives and it's time to start looking for records. Open Evernote on your laptop or tablet and select "All Notes" from your notebook list. Scroll down to your list of tags and find "Records-to-Find" and start searching.

Eureka, you've found a record! If you are viewing a microfilm or microfiche, there may be a way to acquire a scan to your flash drive which you can then use to create a new note. Alternatively, you can capture the image by taking a photograph of it with your smart phone or tablet directly into Evernote. If your record is in a book, take a photograph note of the page as well as the book cover and the publishing information page. If you are viewing an original document, you can often take a photograph but check the archive rules and regulations note that you created earlier. If there is no scanning or photography allowed, transcribe the record into a note. Once your new record is in Evernote, you will want to ensure that you have enough information to create a source citation when you get home. Find your "Records-to-Find" note and right click it. Choose the option "Copy note link". Go to the new note containing the record and paste the note link above your image or transcription. Copy the note link from the record note into the "Records-to-Find" note to complete the cross reference. If your record was an image of a handwritten document, you may want to create a transcription note of it as well. Link all three notes with the "Copy note link" references. Change your "Records-to-Find" tag to "Records-Found" and start searching for the next record from the "Records-to-Find" tag list.



Drag frequently used notes such as your pedigree charts or family charts to your Evernote toolbar to create a quick shortcut to the note.

When your trip is over and you arrive home, instead of having a mountain of disorganized materials to wade through, your research is neatly documented in Evernote and easily searchable. Every document that you found is linked to the catalogue entry making source citations a snap. Aren't you pleased with your new research assistant?

## Other Ideas for using Evernote as Your Research Assistant

### ***Genealogy Conferences, Meetings and Classes***

- When attending a genealogy conference, save the conference schedule as a note in Evernote.
- Before the conference, save the syllabus for the classes you want to attend.
- Add your own class notes to the syllabus notes
- Take a photo of people you meet at genealogy conferences with them holding up their name tag or business card. Evernote will do OCR (Optical Character Recognition) on the photo and the person's name will become searchable in Evernote.
- Found a notice at the library about an upcoming lecture? Create a photo note of the notice and let Evernote remember the date and time.
- Clip the meeting schedule from your genealogy society's website.

### ***Books and Magazines***

- Create photo notes of all your genealogy books and magazines – so you don't buy them again.
- Scan magazine articles into Evernote for future reference to avoid searching through stacks of magazines later.
- Lending a book? Snap a picture of the person who borrowed it holding it so you don't forget who you lent it to.
- Create a "book wish list" notebook and clip notes from the web or take photo notes in the book store of books you want to buy.
- Save quick sheets and cheat sheets to Evernote so you always have them handy.
- Save a copy of the GPS (Genealogy Research Process) to a note and drag it to your Evernote toolbar so it is always handy.
- Save your PDF eBooks as notes to make them easy to find.

### ***Computers and Software***

- Take a photo of your printer's ink cartridge box so you can refer to it on your smart phone when purchasing refills.
- Record the serial number that came with your software and attach the PDF manual to the same note.
- Create a note that lists frequently used key-stroke combinations for creating special characters when typing. An example would be ALT-36 which is used to create the symbol \$ or ALT-130 to create the accented é when typing a French word.

### ***Cemetery Research***

- Before visiting a cemetery, create a note showing the cemetery layout map that you can refer to on your smart phone.
- Create a note listing all the people buried in the cemetery you plan to visit and record the section and plot numbers for each grave.

- Use Evernote on your smart phone in the cemetery to take photo notes of tombstones and record the GPS coordinates of the grave.