

# ***Using "Evernote" for Genealogy: clip sources anywhere and organize them in the cloud***

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Genealogists collect and use a variety of different types of documents and information. We want to be able to store, track, and recall related pieces of different types of information whenever and where ever we are working. We want to preserve the information and back it up in case our computer or mobile device gets lost or broken. We also want to share our information with others who may or may not have the same kind of computers or mobile devices that we have. Evernote can help.

## **What Evernote IS**

**Evernote** is a program for computers both Mac and Windows and an app for mobile devices from iPod/iPad/iPhones to Android tablets, smart phones, even the Kindle Fire. It provides a way to collect, tag, and store digital notes of various types including text, image, audio, and pdf files (for the free version) and any file type for the premium version. It's ability to work with many different devices and synch between them so it's always available allows it to be with us whenever we need to record or recall information.

Using Evernote we put our data into a collection of notebooks with tagged notes inside. Notes can include text, images, audio files or pdfs (if we are using the free version) or any file type if we upgrade to premium (\$45 per year)

We can easily tag notes with information that will help us find those notes later, search for notes based on tags, and move notes to different notebooks. Clipping applications for various internet browsers make it easy to clip information from the internet directly into Evernote while automatically saving the URL to the site where we got the information.

## **What Evernote IS NOT**

Evernote is not a replacement for your family history software.

It is not a sophisticated word processor, it has no support for special characters, like foreign currency symbols, but it will handle basic writing tasks and can be of great help to writers seeking to collect and organize their information.

It is not a calendar. It will not provide alerts or reminders, but it will allow you to insert functional checkboxes into lists so you can click to check off tasks when they are complete.

## **Getting Info Into Evernote**

You can type text directly. It has basic text and formatting capabilities. You can forward emails to Evernote and store them as notes. When my Canadian cousins send me photos and descriptions of their family history excursions, I can take the email and forward it to my unique Evernote address and the email is automatically stored as a note in my default notebook. Some scanners scan directly into Evernote. Some cameras can do the same. Browser based clipping apps make it easy to clip useful information from the web, and making it very easy to connect citation information to the

## **Tagging – critical for tracking and organizing information**

Adding tags to notes help you find that note later. Add tags to help you find the item when you need it. You can search one notebook or all of them. Once you find these related notes, you can easily drag and drop them into another notebook.

## **Using the Info you have Organized in Evernote:**

### **Sharing**

You can share a single note or a whole notebook. Notes can be shared to email, facebook, twitter or you can copy a URL and embed it in a document. Notebooks can be shared with specific people or with the whole world (anyone with the URL). All this is available with the FREE version.

With the premium version, you can collaborate with others by allowing them to edit your shared notebooks if you wish.

### **Printing**

You can print a note, a group of notes, or a whole notebook. You can click a checkbox to have each note start on a new page. This is handy if you will be sorting those printed notes differently.

## **How Genealogists Can Use Evernote**

### **Preparing for Library Research**

I am always finding a new resource that I want to consult: books, microfilms, reference works that are held in a library or repository. I used to keep that information on index cards and post-it notes. Now I store the information in Evernote. I make the call number or catalog information the TITLE of my note. That way the list of notes is useful as a list of sources I need to find. I don't

have to open each note to decide the catalog info.

I tag each note with the repository (library, archive, etc), the surname of the relevant person or family, and the type of record (eg. Birth, baptism, marriage, death, military). If I want to know which sources I need for a particular family, I can search on that tag. If I am traveling to a particular library, I can search on that tag and pull up a list of sources I need from that library.

## **Doing Library or Archive Research**

When I do my research, as I look at the sources on my list, I save tagging time by reusing that source note to contain the note about the contents of the source. I write down additional citation information and source condition and comments right in the existing note. Then if I take a photo or scan a document, I write the number of that photo or scan right in the note with that citation info. So, when I sort through my photos, scans or copies, I know exactly which photos go with which citation info. Once I upload the photo or scan, I can put the image right into the note with all the citation info. THEN I will label the document and citation info (primary source or secondary source) and move it to a notebook of sources about the relevant family.

If my source turns out not to have useful information, I note that also and move that note into a notebook of sources searched for that family with negative results, so I don't have to repeat that search.

One might be tempted to try to combine the source document with secondary sources like transcriptions, translations, or abstracts of the document, but my historian friend suggests we resist that temptation. Label that document and it's citation information "primary source" and then put any transcription, translation, or abstract in a different note labeled "secondary source".

This method helps you keep clear which sources are primary and which are secondary. My library reference notes then become either a primary or secondary source note, or part of the negative research log.

## **Collecting and Labeling Source Information where ever I am**

I really like the ability to capture information where ever I am (with Grandma Ethel, in a cemetery, courthouse, library, or in front of the city mural) with whatever I have at hand (camera, phone, scanner or copier, I can even dictate an audio note directly into Evernote). Then I can record the source information right into my Evernote. Evernote notes can includes not only a URL for information clipped from the web, but also a location (a written description or a GPS location) for each note. This can be very useful when visiting cemeteries or ancestral homes. Then the information is store

## **Collecting & Sharing Different Types of Digital Information about Families and Ancestors**

I make a notebook for a family group (like a digital scrapbook) with pages for different family members or couples. I include photo, typed stories or pdfs of family history info, audio clips of oral history interviews of or about the person, and a note that includes pedigree charts and family group sheets that show how all the people in the notebook are connected.

Then I can share the notebook with other family members and send them the URL so they can view the notebook. If I get the premium version, I could have those family members collaborate with me on the notebook. If not, then I can still let them see what I have put together, and I can limit it to only people I specify or share with anyone who has the URL.

If I got the premium version, I might save a copy of the relevant GEDCOM to the note with the pedigree chart and group sheet.

## **Research Plans**

I also use the active checklist boxes to keep track of my Genealogy Research tasks.

## **Conclusion**

These are just a few ways that I have used Evernote in my genealogical research. How will you use this valuable organizing and backup tool to help you keep track of your genealogy research projects?

Download a free copy of Evernote from [www.evernote.com](http://www.evernote.com).