

Advanced Evernote for Genealogists

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Considerations for this topic

- Different versions of Evernote (Web, Windows, macOS, Android, and iOS) do not have all the same features.
- Different versions may not have implemented the same feature using the same method.
- Some features may have been added or removed since the time this handout was submitted to the conference.

Searches

- Searching is case insensitive.
- “all the search terms” is assumed.
- Put multiple-word terms in quotation marks for phrase searching.
- Use * (asterisk) at the end of a search term as a wildcard character to match all words beginning with the letters of the search term.
- Use the following search operators to narrow your search:
 - intitle:
 - notebook:
 - any: (this is like using “or”)
 - tag: and -tag: (combine with * to find all notes with or without tags)
 - created: and updated: (refers to on or after the date) – put dates in YYYYMMDD format, or day-1, day-2, week-1, etc. in reference to current date
 - todo: (use todo:true for checked checkboxes, todo:false for unchecked checkboxes, and todo:* for all notes with checkboxes whether checked or not)
- Saving searches:
 - Maximum number of saved searches - 100
 - Windows – File > New Saved Search... or click the + symbol next to Saved searches in the left-hand menu.
 - Mac – After doing the search, choose Edit > Find > Save Search.
 - iOS – After doing the search, tap the magnifying glass with the + symbol.
 - Android – After doing the search, tap the 3 dots and then Add to Home Screen (these searches are not synced to other devices).

Templates – Using

- Go to <http://evernote.com/templates>
- These include Individual Project, Weekly Review, Meeting Agenda, Meeting Notes, Frequent Flyer Numbers, Travel Calendar
- Browse, then View Template, then Save to Evernote
- Create a new note, then move into the note body.
- Click Template and choose the template to use.

Templates – Creating (Premium-only feature)

- Create the note
- Click Options, select Save as template...
- Enter a title and click Save

Merging Notes (Windows- or Mac- feature)

- After the merge, the original individual notes are automatically put in the Trash notebook (but you can restore them if you want).
- Windows – ctrl-click for each note, then choose Merge Notes. The merged note contains the original notes in the order they were selected, with the new title being the title of the first note selected.
- Mac – cmd-click for each note, then choose Merge Notes. The merged note contains the original notes in the order they were already sorted, with the new title being the title of the note sorted at the top.

Sharing Notes

- Public Note URL – click Link to generate a shareable URL, “Stop sharing note” to turn it off. This link is read-only.
- Facebook, Twitter, or LinkedIn
- Email:
 - Maximum number of emails that can be sent from Evernote per day – 50 (200 for Premium)
 - Or, generate the link for the note and paste that into an email

Sharing Notebooks

- Highlight the notebook and choose “Share notebook”.
- Identify the individuals and choose their level of access:
 - Can edit and invite (can change notes, add notes, share notes vial email and public URL, and invite additional users)
 - Can edit (can change notes, add notes, and share notes via email)
 - Can view

Table of Contents Note (Windows- or Mac- feature)

- Windows (ctrl-click) or Mac (cmd-click) on all relevant notes.
- Choose Create Table of Contents Note.

Reminders

- Go to a note and click the Reminder icon (the alarm clock).
- Click “Notify Me”.
- Choose a date and a time for the reminder.
- If the note already has a reminder, you can click the icon and:
 - Mark the reminder as done.
 - Clear the reminder.
 - Change the date/time of the reminder.

Note History (Premium-only feature)

- Go to the note and choose the “more options” or “info” button.
- You may then have to choose Note Details... or View note info...
- Click View History.
- Click the particular version of the note to view it.
- Use copy/paste or the Import or Export feature to restore from an older note.

Email Import (Premium-only feature)

- Maximum number of emails that can be imported per day – 200
- Go to your account settings to find your unique Evernote-assigned email address. (Suggestion: Make this a contact called “Evernote” in your email client.)
- The email subject line will become the title of the new note.
- Optionally add reminders, notebooks, and tags in the subject line (in that order):
 - For reminders, begin the date (specific date or “tomorrow”) with !
 - For notebooks, begin the name of the notebook with @
 - For tags, begin the name of the tag with #
- You can add the email content to an existing note by adding + at the end of the subject line and matching the subject line to the note title (if there is more than one note with the same title, it will add it to the most recent note with that title).
- The “Auto-filing” setting is available in Personal Settings to automatically file and tag notes.

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