

EVERNOTE ESSENTIALS

Brett Kelly



Evernote Essentials, 4th Edition
by Brett Kelly

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Introduction

I'd be willing to bet that, at some point in your life, you've purchased a paper notebook of some kind. Maybe it was wire-bound and cost a nickel at the grocery store; or perhaps it was encased in a rare animal skin and cost as much as a fine pair of Italian loafers. Your notebook may have been used for anything from compiling shopping lists to brainstorming the Definitive American Novel. It could be equally useful in tracking a list of tasks or keeping tabs on your monthly spending at the Waffle House.

None of this actually matters as long as you can identify with the need to have a large number of pages bound into a conveniently portable little package.

Paper notebooks have their obvious limitations. As handy as they can be, they—to use an Internet buzzword—don't *scale*. If your notebook isn't with you when you need to find something written in it or record a new idea, you're out of luck, Chuck. And flipping through a hundred pages or so in search of that phone number you jotted down in the elevator at that conference is, to say the least, inefficient (and, potentially, more than a little embarrassing).

Now imagine you could take that same paper notebook and add any type of digital file you wanted to it. It could hold images and record your voice and play it back to you. You could easily rearrange the pages, annotate them in any way that tickles your fancy, and search the whole mess from the top of the very first page. This notebook is designed to

be with you for your entire life. You won't ever have to worry about it filling up or about accidentally misplacing it. That's Evernote: a ubiquitous digital notebook which syncs to the web and across all of your devices that can capture, store, and index just about any type of data you can throw at it.

Since you're reading this, chances are you have at least a fleeting interest in learning more about this versatile application. As I write this, I've been using Evernote for over five years and have well over 12,000 discrete pieces of information stored in it: funny pictures that I've found on the Internet, digital backups of my tax forms, photos of my wife and kids, and audio recordings I've both made and found—even early versions of this very text you're reading right now—it all lives in Evernote.

My goal in writing this is twofold:

- First, to take people from Evernote Newbies to Evernote Ninjas¹.
- Second, take the Evernote Ninjas and show them a few tricks and advanced techniques they never knew existed.

A lofty goal, I admit. But, I'm one of the biggest Evernote nerds you're likely to come across and I think that, if you're really interested in getting the most out of Evernote, this is the guide for you. So, rather than continue prattling on about it, we're going to get into the nuts and bolts of the desktop applications, the mobile applications, and the web service (yes, Evernote is all of these things). I'll cover how to configure Evernote for the first-timers as well as how experienced Evernoters can make the most out of facilities like tagging and advanced searching. I'll also be providing a bunch of use cases and examples for how you, my dear friend, can take your use of Evernote to the next level.

To make sure we're all speaking the same language, I've defined a few key terms that will appear frequently within this book. I give you The 60-Second Evernote Glossary (patent-pending):

- **Database:** While not an official term, you'll see it throughout this book as a succinct descriptor for your entire collection of Evernote notes and notebooks. This term is interchangeable

¹ Yes, I realize that "ninja" is the correct singular and plural form of the word. What can I say? I'm a contrarian.

with “Evernote account.”

- **Note:** A single item stored in your Evernote database. This could be a PDF, an image, a piece of text, any kind of other file on your computer, an audio file, or any combination thereof.
- **Notebook:** A named container used for storing notes in a logical way (you might have a notebook called “Shopping Lists” or “Recipes,” for example). As of this writing, each Evernote account can have up to 250 notebooks.
- **Stack:** A named container for notebooks. This allows an additional level of organization of your notes and notebooks (your “Medical” stack might contain “Insurance” and “Records” notebooks, for instance).
- **Tag:** A short, descriptive piece of text applied to a note that can be used to identify it later or group several notes by topic. Each note may have multiple tags (or none at all).
- **Clipping:** The act of snagging content from a source (your web browser or another application on your desktop or mobile device) and adding it to your Evernote database.
- **Sync** (or synchronization): Evernote’s behavior of keeping an up-to-date copy of your entire database (except the parts you tell it not to) somewhere on the Internet. This happens at timed intervals that you can configure.
- **Premium Subscriber** (or Premium user): An Evernote user that pays a nominal fee every month for additional features and the ability to add more data per month than free users.
- **Shortcuts** (keyboard): A set of global keystrokes (which means they work no matter which application is currently active) for adding new notes, taking screenshots, or initiating a new search of your Evernote database.

² This is a relatively new feature at the time of this writing and may not be available on all Evernote applications.

- **Shortcuts:** A collection of selected notes, notebooks and tags that are readily accessible in most² Evernote applications (desktop, mobile, etc.).
- **Saved Search:** A search query that has been saved with a custom name and that can be executed anytime with a single click.
- **Reminder:** A note attribute that, when activated, will cause the note to appear at the top of any list of notes in which it appears. Reminders can also have an optional notification sent at a date and time set by the user.
- **Attributes:** Bits of data about each of your notes: the day it was created, how it was added, which types of media it contains, and so on. Each note in your database has these (though, some have more than others).
- **URL:** An Internet acronym which stands for “Uniform Resource Locator.” It’s just a fancy name for a website address, like <http://nerdgap.com> (it can actually refer to many other things on the web and on your computer or device, but in this book, we’ll use it only to refer to website addresses).

Throughout this guide, I’ll be referring you to the resources page. This is a page on my website where you can find all of the links and such referenced in the text (lest they change and this thing goes out with one or more bad links in it). The resources page is located [here](#).

One last thing before we put the spaghetti in the machine...

Evernote employs roughly 40 billion³ engineers, designers, and other genius-type folk. One side effect of such an arrangement is that Evernote is very aggressive about updating its various applications. While I’ve done my best to ensure that everything in here is current, know that it’s possible for this text to not match up exactly with the latest offerings from Evernote. Most of these changes are visual and don’t really affect how the software itself behaves. So, while some of the screenshots might be different, the concepts will almost certainly apply.

Ok, ready to dive in? Let’s do this.

³ Hyperbole is the spice of life, folks.

Notes

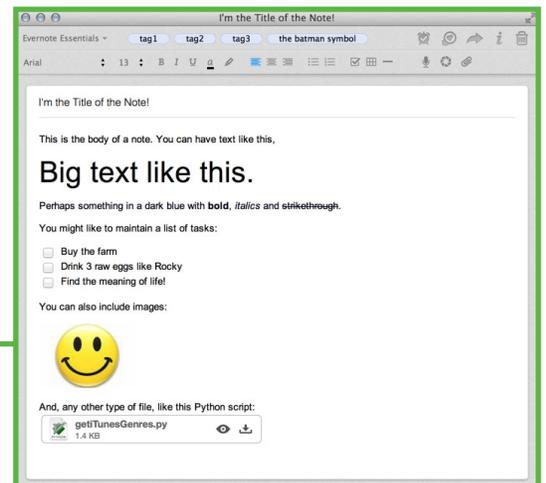
Everything you store in Evernote is kept in a note. While this may conjure up images of phone numbers or book titles scrawled on sticky notes or maybe the backs of envelopes, notes in Evernote are much more powerful.

As we discussed a second ago, notes can house just about anything digital: text, images, files, audio clips... you name it. I'm sure that all sounds super fancy, but that's just the kind of theoretically useful information you're looking to avoid. Am I right? Of course I'm right.

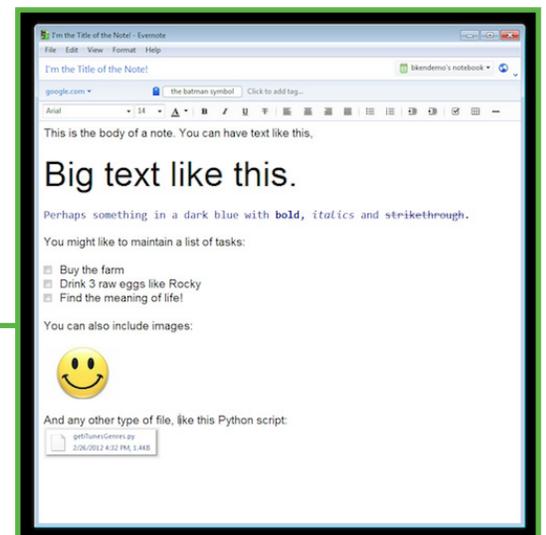
That said, let's take a look at the anatomy of an Evernote note.

Since Evernote for Windows and Evernote for Mac aren't exactly identical twins, we'll look at the same note on both platforms so everybody's on the same page.

First, on the Mac:



Now, the same note on a Windows PC:



Whoa, Nelly! Clearly, there's a lot going on in these windows. Let's talk briefly about each of the major interface elements visible in these windows as well as the various kinds of trickery we can do inside the note body. Again, these windows are pretty different, so the position of the various elements won't be the same on the Mac as on Windows (but they're not too hard to spot).

THE NOTE WINDOW

First, the title of the note. The title can be whatever you'd like; just click on the title itself to change it.

Next are the tags (in the little blue ovals at the top of the window on the Mac, the white rounded rectangles under Windows). You can add more tags by clicking to the right of the last tag and remove them by clicking the tag and hitting the Delete key on your keyboard. If you start typing a tag that Evernote already knows about, it will offer you the option to automatically fill in the rest of the tag.

Just below the tags in the Windows interface, you'll find the source URL field. If you use one of the Web Clippers (discussed later) to grab the contents of your note, the source URL field will contain the URL of the webpage from which you clipped it. If you'd like to change the value of this field, you can edit it directly by clicking on it. To view and/or change this value on the Mac, you'll need to click the little "i" button at the top right and change the URL there (we'll talk about this section in more detail in a minute).

Now we're to the fun part: the body of the note. As you can see from the screenshots above, that white rectangle is pretty versatile. Directly above it, you'll find all of the various formatting options available to you when editing your note. Choose a font, size, and color as well as alignment and justification (centered, right justified, left justified, and fully justified) options, bulleted and numbered lists, checkboxes (for to-do's), simple tables, and a horizontal divider. If you've used any type of word processor or WYSIWYG ("what you see is what you get") editor on the web, chances are you've seen most of these options before. If not, play around with them and you'll have the hang of it in a couple of minutes. Note that these tools are only visible on the Mac when your cursor is inside the note body.

In the body of your note, you have several examples of styled text. You may have big text, small text, red text, and blue text (Dr. Seuss fans — I'm available for parties). Like I said, the text-styling stuff is pretty standard if you've used other rich text editing tools in the past. Let's look at the things you're not used to seeing...

Checkboxes are pretty darn useful if you like to make lists (and goodness knows I do). While you can add them by clicking on the checkbox image above the body, it's much easier and faster to do it using the keyboard shortcut (Ctrl+Shift+C on Windows, ⌘+⇧+T on OS X). Once they're in there, you can select and deselect them all day long.

If you want to add images, you have a few options. You can copy images from the Web if your OS supports it (right click > Copy, then Paste into Evernote) or you can drag them from your desktop or web browser. You can also email images to Evernote (which we'll cover in greater detail later on).

If you want to add files to your notes, you can do that by dragging them from another application on your desktop or by emailing them. There's no limit as to the type of file that can be added, so go ahead and drop whatever file you like onto a note and Evernote will keep it safe and accessible.

Finally, Evernote for both Windows and Mac ship with built-in audio recording. Simply click the microphone in the toolbar and the audio will start recording. Once you've got the audio you want, click "Save" and the audio file will be embedded in the body of the note. Because the audio is recorded at a relatively low bit rate (meaning they're fine for recording somebody speaking, maybe not so good for recording a symphony), the resulting files won't be very large. Free users will be able to easily fit an hour of audio or more into a single note.

MAC EXTRAS

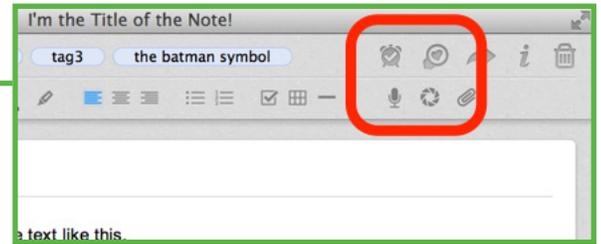
Evernote for Mac has a handful of extra functions that aren't⁴ present in Evernote for Windows. We'll get into them in more detail later, but just to avoid confusion, I'll quickly describe them now.

⁴ These features may be missing from Evernote for Windows because they haven't been implemented yet, or they've been left out entirely.

⁵ If you don't have Skitch installed on your Mac, click this button will give you a little popup telling you where you can download it.

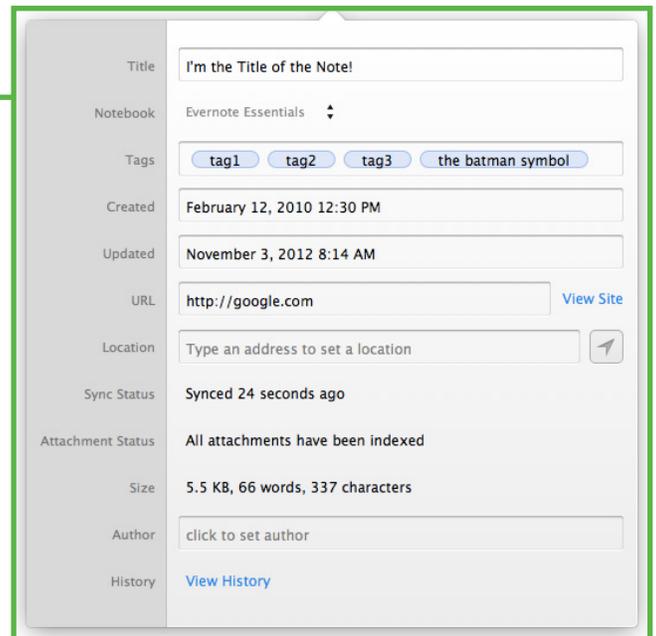
At the top of the window, you'll see a little alarm clock and a little encircled heart. Right below those, notice the round camera shutter icon:

- The alarm clock is used to create and edit reminders. We'll cover those in great detail later on.
- The encircled heart lets you edit the current note using Skitch, Evernote's image annotation application.⁵ You can also right-click an image or PDF embedded in a note and modify only that file using Skitch.
- The camera shutter will let you take a photo with your Mac's iSight camera⁶ and insert it into the note body.



Finally, we have the info panel. If you click the little "i" at the top right of the window, you'll be presented with a whole host of information about that note:

Much of this information is available outside this panel (note title, notebook, tags, etc.), but the info panel does offer a bunch of other stuff like the note's source URL (if you clipped it from the web), the dates the note was created and last modified, and whether it has been synced. If the note contains attachments that are capable of being indexed for search (like images), it will also tell you whether they've been indexed. Then, you can see how large the note is (both its size in bytes as well as the word and letter counts), view and change the "author" value of a note (something I personally don't use very much, but can be helpful when searching), and view the history of the note.



Speaking of...

NOTE HISTORY

Premium users have the ability to view previous versions of a given note (provided it's been changed since it was created).

⁶ I don't exactly know why this function is omitted from Evernote for Windows, but I'm assuming it's because most Mac computers have a built-in camera while many Windows computers do not.

This is a little ambiguous, since it gives the impression that each change to a note is recorded and can be restored later. In fact, Evernote doesn't remember every single change made to a note. Instead, it checks every few hours to see if a note has been changed. If it has, the previous version is saved. In other words, don't expect to see each revision of a note you've changed ten times in the last three hours.

If you want to restore an old version of a note, click the "View History" option and you'll be shown a complete list of stored revisions of that note. Click "import" next to the one you want to recover and it will be added to your account.

Note: *this action simply adds the old note back to your account and will not overwrite the current version. If you want to delete the newer version or merge any changes between the two versions, you'll need to do that by hand.*

ADDITIONAL FACTOIDS ABOUT NOTES

For users with Free Evernote accounts, a single note cannot be larger than 25 megabytes. For most people, this isn't a big deal, but if you're thinking of using Evernote to store your raw video footage or DVD rips, you're mostly out of luck (unless the file is 25mb or smaller, obviously). If you're a Premium Subscriber, that limit goes up to 100mb per note.

If you right click a file in Evernote and open it with an external application, any changes you make will affect the file stored in Evernote when you save it. For example, if I have a spreadsheet housed in a note and I open it with Excel, modify a few things and save it, then the version in Evernote will reflect the changes made. This is called the "Live Update" feature and is really handy if you find yourself editing a file stored in a single note from multiple computers.

This basic overview barely does justice to how versatile a single note can be. In later chapters, we'll be talking all sorts about how to maximize the utility of these little hunks of awesome.

Notebooks & Stacks

Welp, here we are. Notebooks.

Simply put, notebooks are named containers for notes. How you decide on where your notes should live and how they're categorized is up to you, but in this section we're going to go over nuggets like these:

- What the heck a notebook is
- The different types of notebooks
- Power-user strategies for making the most out of your notebooks

WHAT'S A NOTEBOOK?

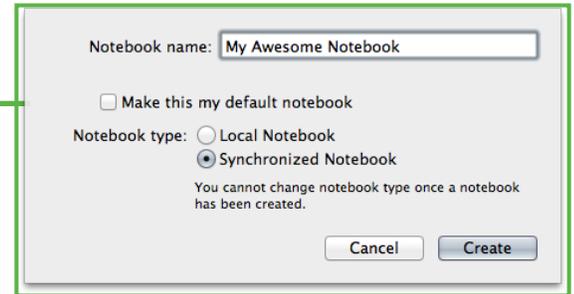
Well, as I mentioned a second ago, notebooks are containers for notes. When you first create an account with Evernote, you'll have a single notebook called [your username]'s notebook (e.g., if your Evernote user name is "Jane" then your default notebook will be "Jane's notebook"). Until you create additional Notebooks, all of your notes will live in that notebook.

The good news is that you can create additional notebooks: up to 250 of them, in fact. This means that you can have a notebook for recipes, another one for sewing patterns, and yet another for all of your favorite database queries. Or, you know, something like that.

To create a new notebook on Windows or Mac, open the File menu and select “New Notebook.”

The dialog box that pops up will look something like this:

Here, you can assign a custom name to your notebook, but there are also a couple of other options below that we haven't discussed yet...



WHAT THE HECK IS A “DEFAULT NOTEBOOK”?

There are lots of ways to add stuff to Evernote: email, from the web using browser plugins, and others. When something is added to Evernote or a new note is created without defining a specific target notebook, your default notebook will be the home of your new note. You can move notes between notebooks, of course, but the default notebook in your account will be where it begins its life. We'll cover how to configure which notebook is your default notebook in a later chapter (it's in the application preferences, if you're impatient like me).

“NOTEBOOK TYPE”? ARE YOU SERIOUS?

Evernote Notebooks come in one of two flavors: Local and Synchronized.

Local Notebooks live only on the computer where they are created. If you add any notes to a Local Notebook, they will not be synced to Evernote Web and, thus, will not be available on your other computers or devices.

This is a rather important distinction. In some instances, a local notebook may be the correct choice. If, for instance, you store sensitive financial or medical information in Evernote, then you may want to use a local notebook for this information. The basic rule is this: local notebooks will only ever be accessible to people with physical access to your computer. If the information you're storing in Evernote

is sensitive enough to warrant this type of security, then go ahead and choose “Local Notebook”.

Synchronized notebooks are different and, if you ask me, represent what is arguably Evernote’s flagship feature. Anything you drop into a synchronized notebook will be automatically uploaded to Evernote Web (accessible by visiting evernote.com in your web browser) and, in turn, synchronized to all of your other Evernote-enabled devices (tablets, smart phones, other computers). And, as you may have guessed, any changes made to already-synchronized notes will be synced, as well.

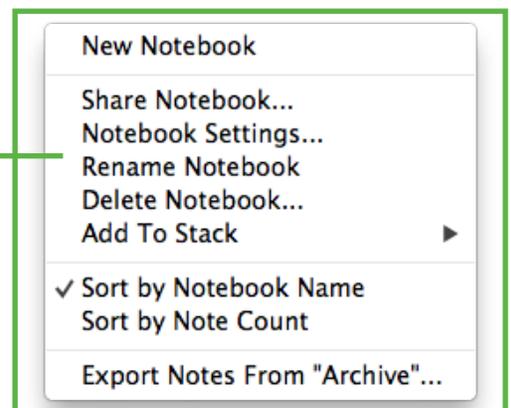
The vast majority of the time, you’re going to want to choose “Synchronized Notebook” here. For what it’s worth, I have exactly zero local notebooks in my account (and I have upwards of 100 notebooks as I type this) because I want all of my data to be available to me, all the time. Local notebooks are nice for extreme cases, but I find them to be far less useful than synchronized notebooks. Also, local notebooks can only be created using Evernote for Windows or Mac — the mobile Evernote applications can’t create local notebooks.

NOTEBOOK ODDS AND ENDS — WINDOWS

With one exception, the concepts surrounding Notebooks in Evernote are pretty straightforward. Once you’ve created a notebook, you can control its entire destiny by right-clicking the notebook. When you do, you’ll see these options:

Let’s quickly go over what each of these does (though, most of them are pretty simple, I think):

- New Notebook — Just like it says on the tin, this option creates a new notebook.
- Share Notebook — This is the “one exception” I mentioned a second ago. Sharing Notebooks isn’t difficult, but it warrants an entire section of this guide, so we’re going to shelve it for now.



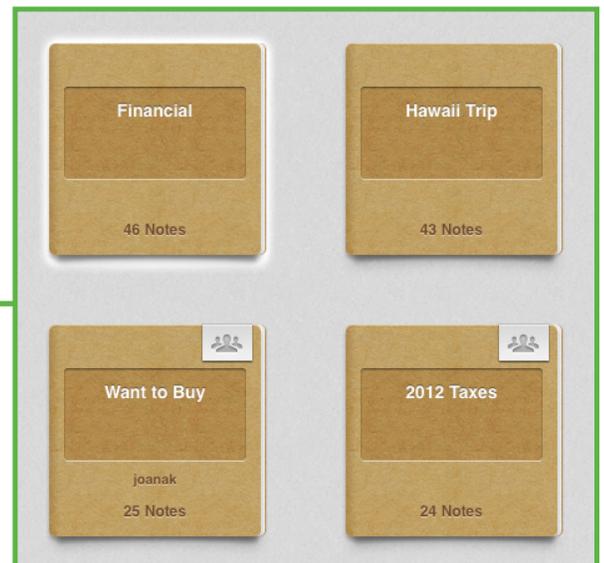
- **Rename Notebook** — Change the Notebook’s name. I’ll let that sink in for a sec.
- **Delete Notebook** — (“Is he really going to explain what ‘Delete Notebook’ means?”)
- **Add to Stack** — We’re going to talk about stacks in roughly 20 seconds. For now, know that this option adds the clicked-upon notebook to a notebook stack.
- **Sort by Notebook Name or Note Count** — The former of these two options will sort your list of Notebooks alphabetically by name, while the latter will sort them according to the number of Notes that each notebook contains (with the most packed notebook appearing at the top).
- **Export Notes from “[Notebook Name]”** — If, for some reason, you decide that you’d like to take your data and do other things with it, this option will let you export all of the notes in that notebook. We’re going to cover exporting and importing in a later chapter, but this isn’t something you’re going to need to do very often.

NOTEBOOK ODDS AND ENDS — MAC

The above options are all available on the Mac as well. By default, the notebook list is collapsed on the right-hand side of the main Evernote window. Right-click it and choose “Show Notebook List” to see all of your notebooks.

This list doesn’t give you the ability to modify your notebooks beyond sharing them and changing the name (“Sharing Settings” and “Notebook Settings,” respectively). To perform the rest of the actions mentioned in the Windows section, you’ll want to click the “Notebooks” item in the sidebar. On the right, you’ll have your notebooks laid out either in a grid or a list. Here’s what the grid looks like:

- To create a new notebook, click “New Notebook” at the top left of the grid or under the File menu.
- To share a notebook, right-click it in the notebook list on the right-hand side of the main Evernote window or click the “arrow in a box” icon nestled within the



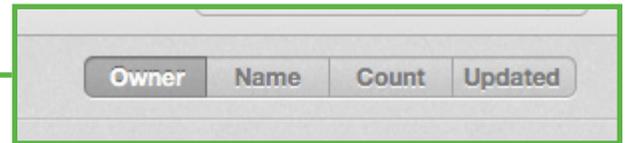
notebook's icon in the grid. Again, we'll cover sharing in more detail a bit later.

- To change the name of a notebook, click the name of the notebook in the grid and it will become editable:



To add a notebook to a stack (more on those in the next section), drag the notebook you want onto the stack you want and let 'er go. To create a new stack, drag one notebook onto another and a new stack will be created automatically.

If you want to change the way your notebooks are sorted in the grid or the list, choose from the following options at the top of the window:



- Owner sorts the notebooks by who owns them. Essentially, notebooks that you create will appear above notebooks created by other people that are shared with you.
- Name sorts the notebooks alphabetically.
- Count sorts the notebooks based on the number of notes contained in each notebook with the fullest notebooks at the top.
- Updated sorts them according to the last time their resident notes were modified with the most recently updated notebook at the top.

Finally, if you want to export all of the notes in a notebook, click the notebook in the grid or list, then choose "Export notes from [notebook name]..." from the File menu.

NOTEBOOK STACKS

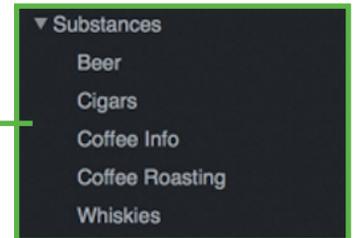
As promised, it's time to chat about Notebook Stacks. Relative to the rest of the application, this feature is arguably the easiest to understand and use. Let me offer what my High School English teacher would have called a "teaching metaphor":

Notebooks & Stacks

Imagine you're sitting at a desk. On this desk are two spiral-bound notebooks (the kind we've all seen and probably used in school). Now, imagine that you take one of the notebooks and place it directly on top of the other notebook. Then, you grab a cocktail napkin and a red crayon and scribble "My Notebooks" on it, then place it on top of the stacked notebooks.

Congratulations; you now know literally everything there is to know about notebook stacks in Evernote.

As mentioned briefly in the introductory glossary, a stack is a named container for notebooks. Here's an example:



In this image, we have a stack called "Substances" which contains a few notebooks including "Coffee Info" and "Coffee Roasting." I can even click the little arrow icon to the left of the stack to collapse it if I want to!

You can create a notebook stack in one of two ways:

- Drag one notebook onto another notebook (the second notebook must not already belong to a stack).
- Right-click a notebook and choose "Add to Stack". Then you'll be able to choose from your existing stacks (if you have any) or choose "New Stack" which will, yep, create a new stack.

If you want to move a notebook out of a notebook stack under Windows, just drag it onto "All Notebooks" and drop it. On the Mac, select the stack (which will display all of the notebooks it contains), then drag the notebook you want to remove out of the "thought bubble" and into the area containing your other notebooks and stacks:



A few other things to note about stacks:

- They can't contain notes; only notebooks.
- They can't be shared (though the notebooks that live inside them can be shared individually).
- Other than giving you a way to visually organize your

notebooks, they don't serve any meaningful function in terms of how your data is stored. In other words, notebooks are not “children” of their respective stacks. As far as Evernote's big computers are concerned, stacks are just eye candy for us users.

SO, WHAT'S SO GREAT ABOUT NOTEBOOK STACKS, SMART GUY?”

In the dark ages before notebook stacks, we Evernote nerds were forced to deal with a long, flat list of notebooks. It wasn't a big deal when we only had a dozen or so, but when the number of notebooks got upwards of 50, having to scroll and scan for a specific notebook became a real pain in the hindquarters.

Notebook Stacks let you group your notebooks in whatever way makes sense to you. For instance, I have a blog (which is very impressive, I know). I have a few separate notebooks dedicated to this blog and they all have different names, but they all live under a specific notebook stack. Now, I just look for the stack name when visually scanning my list of notebooks, knowing that the notebook I want is nestled cozily inside.

We'll chat more about some additional organizational strategies involving notebook stacks, but that's the biggie.

And with that, we've covered notebooks and stacks. That wasn't so bad, was it? Of course not!

Tags

When I was a kid, my old man and I would play a board game called Othello (you may recognize it as Reversi). On the front of the box below the name of the game, read this poetic little tagline:

“A minute to learn, a lifetime to master.”

That’s sort of how I look at tags in Evernote.

As we learned in our glossary at the beginning, a tag is simply a small piece of text that you can apply to one or more notes. They look like this:



Tags give us the ability to group our information in ways that go beyond the notebook concept.

For example,

I have a son and a daughter that I’m pretty fond of. As I write this, they’re seven and five years old, respectively. If you’ve ever spent any amount of time with children around this age, you’ll know that they can be, among other things, prolific artists. I kid you not; hardly a week goes by when I don’t have one or more hand-drawn pictures delivered proudly to my desk. It’s awesome.

And, as any dutiful Evernote-lubbing parent would, I scan them into Evernote (assuming they’re not coated in glitter and elbow pasta). From there, each drawing is tagged with the young artist’s name. Now, I can search for all of the

notes tagged with my son's name and the word "drawing" (two separate tags) and see all of the drawings he's given me since I started using Evernote. It's equally awesome.

But what's really awesome is that I can select my son's name from my list of tags and see not only his drawings, but also the records from his last few doctor visits, the paperwork we filled out when he went on a field trip with his school and oodles and oodles of photos of him doing various little-boy things.

That's the power of tagging, kids: the ability to group your data in ways you may not expect or plan to when you first capture it.

When you tag a note, just like when playing chess or chasing a sewer rat through your living room, it's important to have a strategy. Here, now, I will share this strategy with you in all its dorky glory:

THE ART OF (NOT NECESSARILY) TAGGING

First and foremost, don't feel like you must tag every single note you create. The fact is, I create, on average, a dozen or two notes every single day. Many of them are quick notes about a thing I'm doing that, for all intents and purposes, won't be useful an hour after I type them. Tagging notes like these would be a waste of time, so I don't do it. If I *really* need to find one of these notes later, I search for it.

If you are, say, 98% sure that the note you're creating won't be of much use in the future, then you have my permission to not tag it at all. No, really — it's ok.

For most of your notes, though, it's worth taking a few extra seconds to tag them. This will be especially handy when we get to the section on searching.

ONE OR MANY?

Of all of the actionable snippets I can offer you here, this one is probably the most important: choose whether your tags will be

singular or plural words from the beginning and follow this standard ruthlessly. For example, I have notes in my account tagged with “book” and others tagged with “books”. This might sound like an incredibly benign little annoyance, but it’s caused me more than one headache over the years.

If it’s all the same to you, I recommend going with the plural form of a given improper noun for your tags: books, movies, blog posts, wines, etc. In my experience, it tends to relate more easily to my little brain. Of course, choose whichever strategy works best for you.

A TAGGING STRATEGY: START GENERALLY, END SPECIFICALLY

If you’re a new Evernote user, it might take a bit of use before you figure out a tagging strategy that works for you. This—not unlike my gently receding hairline—is normal. What follows is a general-purpose approach for tagging that works for me. Modify and massage it as you see fit.

- “General subject” — I quote it here because I’m using it very loosely, but the subject of a note is a prime example of good tag material. If I create a note with a recipe for my favorite cumin-infused waffle batter, obviously we’re talking about food. This should be your first tag.
- “Specific subjects” — To continue with the cumin waffle example, I’d also tag it with “recipes” and “waffles” since that’s what the note contains. Brain surgery, I know.
- Source — If you grabbed this recipe from that dusty box of index cards that shipped to your house along with the rest of Aunt Mildred’s worldly possessions, you might tag it with “Aunt Mildred.” If you grabbed it from some food blog or website, tag it with the name of the site.
- Project (if applicable) — If this note is part of a larger project like, say a cookbook called “The Ultimate Guide

to Cumin and Breakfast Foods,” then consider giving it a tag related to that project. Many notes won’t be part of such a project, so obviously this can be omitted.

- People/places — If the note references any people or places that you find interesting, tag the note with those as well. Don’t be afraid to tag that note with “Lance Bass” or “Duluth” if it makes sense and you think it might help you find the note later on when you’re planning that road trip to see the N’Sync reunion.

BRASS TACKS

The bottom line is there really is no right or wrong approach to this tagging thing. I know a few Evernote power users who have only a small handful of tags, some even have zero tags. Then you have dorks like me who have hundreds of tags. Most people live somewhere between those two extremes.

Experiment with tags as you start integrating Evernote into your life. Tagging is one of those skills you hone over time. Figure out what works for you, but don’t be afraid to course-correct down the road if the need arises.

Getting to Know Evernote Search

Evernote's native search capabilities are, in my humble opinion, part of what takes Evernote from the realm of "cool, useful tool" to "are you a wizard or something?"

We're going to dive head first into all of the search-related bells and whistles (and there are *several* whistles) in a later chapter, but you don't need to wait for that part of our show to start searching. In this section, we're going to cover two of the easiest—and yet, most useful—aspects of Evernote search.

For now, type some stuff into the Evernote search box and run it. I'll wait here (it's cool, I have coffee).

Assuming your search matched any of the notes in your account, you'll see that Evernote dutifully executed your search and showed you the results. Nothing terribly surprising there.

If your account only contains a handful of notes, search isn't really going to rock your world. For those of us with thousands and thousands of notes to sift through, search is both a necessity and a lifesaver. The first of our two headlining features that makes search in Evernote so powerful: the Saved Search.

SAVED SEARCHES

Whenever you issue a search in Evernote (on any of the client applications, including mobile apps), you have the option to save that search for use later on.

For example,

Let's say a good portion of your discretionary time is spent scouring the Internet for Mongolian cumin waffle batter recipes. Let's further assume that the balance of your discretionary time is spent in the kitchen making waffles using the recipes you've found.

Personally, I take very little joy in keying the word "Mongolian"⁷ into a search box, particularly on a mobile device. Heck, I had to look up how to spell it while writing the last few sentences. Thankfully, though, Evernote's saved search functionality is ready and willing to help.

There are different steps involved in creating a saved search depending on the app you're using (desktop, mobile, web, etc.). In most cases, though, it's fairly obvious how to do it. Issue a search in whatever Evernote app you happen to be using and look around for the option to save the search. On mobile devices, this will usually be in the form of a button or graphic near the search box, often including a magnifying glass and an addition (+) symbol. On Windows, you can find the "New Saved Search" option in the application menus. For Mac users, click "Save Search" in the Find submenu under Edit after issuing a search.

When you create a saved search, you'll be prompted to give the saved search a name. It should be short and generally describe what results you'll see when you run it. If I have a saved search for all of the notes created in the last month using my iPhone that contain a photo, I might call the search "Monthly Mobile Photos" or something.

How you name your searches is up to you, but get comfortable with this feature. Like I said a minute ago, when you've got oodles and oodles of notes in your account and you find yourself routinely running the same search, you'll thank your lucky stars that this feature exists.

Oh, and one other thing: saved searches are synced across all of your devices just like notes, notebooks, and tags. If you create a saved search on your Windows computer and then

⁷ Which isn't to say that I don't have all the affection in the world for Mongolia and everybody who calls it home — it's just cumbersome to type is all.

Getting to Know Evernote Search

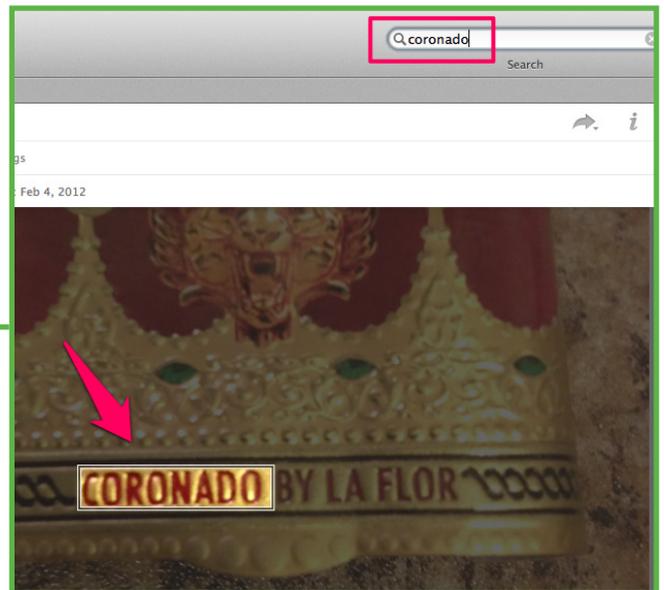
sync your account, that same search will be available on your iPad and your Android phone immediately after those devices are synced. It's really spiffy.

IMAGE RECOGNITION

In my vast decades of experience using Evernote (and as an unofficial Evernote evangelist among my friends and family), this feature is easily the most awe-inspiring: searching for text within images.

Personally, I like cigars. I'm sure it won't surprise you to learn that I use Evernote to record the various cigars I've had over the years. Text search in images comes in very handy here:

Whenever you add an image to a note in Evernote (and the note lives in a synchronized notebook), the image is sent through Evernote's own Optical Character Recognition (OCR) system. It looks for words and characters within the images and adds whatever it finds to the note's metadata, allowing it to be found using Evernote search. It's also really spiffy.



MISCELLANY

A couple things to keep in mind as you begin to experiment with Evernote search:

If you have a specific notebook selected in your notebook list, any searches you perform will only search that notebook. To search all notebooks, make sure "All Notebooks" is selected before you search.

To search for whole phrases, wrap them in double quotes.

As I said a minute ago, we're going to dig much deeper into Evernote search a little later on. This is just a taste of what it can do.

Sync? Huh?

Let's take a quick second and go over what the heck this "sync" business is all about. Luckily for both of us, it's pretty straightforward.

Sync (nerdy shorthand for "synchronization") is the process by which all of your notes, notebooks, tags, and saved searches are copied up to Evernote's servers and back down to all of your devices.

For example,

If I create a note in Evernote for Mac and then manually initiate a sync (it will sync on its own every few minutes unless you configure it not to), that note will be uploaded to a very large group of computers in Evernote's data center. If I then stand up from my desk and launch Evernote on my iPhone, the same note will show up after that app has synced.

This means that you can create new notes in Evernote while your device isn't connected to the Internet and your device will sync normally as soon as such a connection is available (just to be clear, the app has to be running for this to happen).

Now, a couple things to note about the nature of sync as it relates to mobile devices:

Evernote for mobile devices is a little different from its Windows and Mac counterparts in that, by default, all of your data is *not* synced to your mobile device. Rather, when

Evernote on your mobile device syncs, it only downloads a portion of the note called “metadata.” This metadata includes things like the note title, the created and modified dates, etc. The reason for this is, mobile devices aren’t normally blessed with the gobs of disk space available on desktop and laptop computers, so Evernote tries to be a good computing citizen and not eat up your entire storage area.

When you select a note to view on a mobile device, Evernote will—assuming you’re connected to the Internet—download the necessary data to display the note in full. So, if you have a note that has a handful of photos in it, those images won’t be downloaded to your mobile device until you select that note in Evernote.

This can be a bit of a “gotcha” when you’re under the impression that all of your data is always available offline, regardless of the device you’re using. For instance, imagine quickly syncing your Evernote account on your iPad before boarding a 15-hour flight to someplace 15 hours away and, lo and behold, your notes aren’t actually available like you assumed they’d be. A bit of an edge case, perhaps, but it’s worth noting.

Android, iPhone and iPad users are in luck, though. If you’re a Premium subscriber, you can choose one or more (or all, if you want) of your notebooks as “Offline notebooks.” Enabling this feature for a given notebook will result in the app downloading each note in the notebook, in its entirety. And, like the name suggests, the notebook will be fully available to you, even on 15-hour plane rides.

CONFLICTS

Allow me to paint you a word picture.

Say you have a note in your account that contains several ingredients for your entry in the latest cumin waffle bake-off. It’s already synced to all of your devices and is currently up-to-date everywhere.

Let's say you open the note on your Mac and modify it. Let's also say that, before your Mac has synced the updated note, you also modify the note on your iPad such that it's different from the modified version on your Mac. You now have two copies of a note that have been modified two different ways, neither of which have synced yet.

When this happens, it's not uncommon for Evernote to run into a conflict when trying to merge your updates into the existing note on Evernote's servers. If this does happen, Evernote will automatically create a new notebook called "Conflicting Changes" with the date the conflict happened. This notebook will typically contain the modified copy or copies of the note that it wasn't able to automatically merge with the original. This looks a lot scarier than it is; you just need to manually copy the changes you want into the original note (which is left alone during this process), then delete the "Conflicting Changes" notebook.

This whole situation is **very** rare. It's only happened to me a handful of times over four years and generally involves a shared notebook that has been edited by another person. But I wouldn't be a very good teacher if I just left that whole bit out, so there you go.

SYNC VS. BACKUP

I'm a frothy maniac about backing up the data on my computers. Just about everything is in at least three separate places — except for Evernote.

While it is possible to back up the data files Evernote uses to house your information, I personally think of this as wasted effort. When your Evernote data is synced with a desktop computer, there are two copies of it: one in your office and one in Evernote's data center. And, truth be told, once it arrives in Evernote's data center, it's copied to other computers in case one of them takes the dirt nap. Your data is backed up in far more locations than a normal backup nerd would care about.

The point is this: the number of catastrophic events that would have to take place for all of your Evernote data to be lost forever is very *not small*.

If you make use of local notebooks, definitely back it up just like you would any other bit of info you don't care to lose. Remember, Local notebooks aren't synced to Evernote's data center, so the only copy of that data is the one on your PC or Mac. Back it up accordingly.

CLOSING THOUGHTS ON SYNC

As we'll discuss in a minute, Evernote sync happens automatically by default, so you don't have to remember to click (or tap) the Sync button every time you make a change. The vast majority of the time, the process works flawlessly and will require zero intervention from you (other than your being simply delighted in the knowledge that your Evernote data is available to you everywhere).

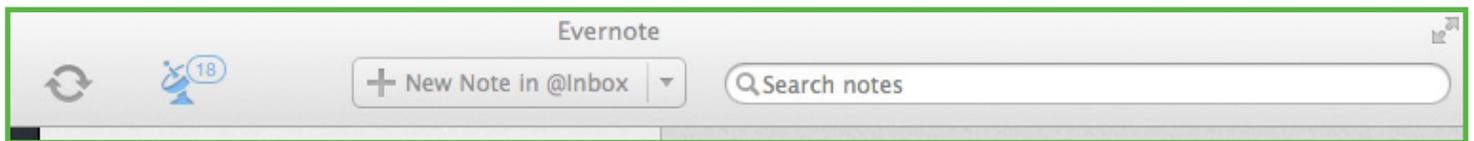
A Tour of Evernote for Mac

Near the end of 2012, Evernote released a *massive* overhaul of its desktop client for Mac (dubbed “v5”). The interface is now very different from the Windows client, so we’re going to cover the Mac app separately here.

(Just to reiterate, Evernote has been known to rapidly change and update its applications, so what you see below may not match the current version of the app exactly.)

Let’s start with the toolbar at the top of the window:

THE TOOLBAR



On the far left (not pictured), you’ll see your full name next to a little graphic. Click that to show a small menu:

The first item is something we haven’t covered yet and called “Fast Account Switching.” It means exactly what you think — if you have more than one Evernote account (like, say, one for work stuff and one for personal stuff), you can have both accounts configured in Evernote for Mac and quickly switch between them. Spiffy!

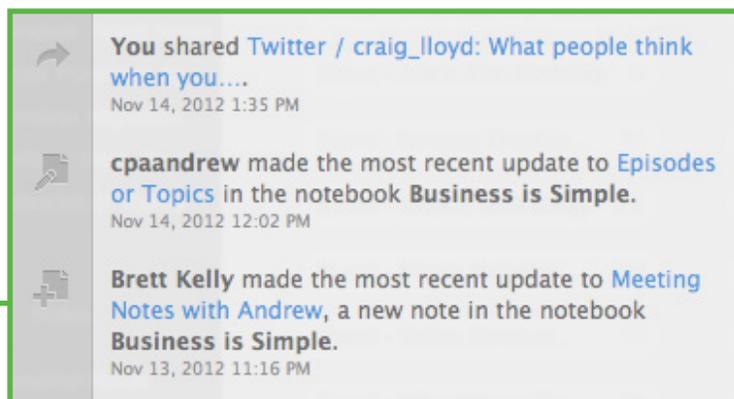


If you want to set up a second account so you can play with this feature, that will (again, at the time of this writing) need to be done on Evernote's website. Once you've created the account, you can login with it on the Mac.

Next is the Sync button. I'll give you a second to guess what this button does...

Yep, it manually initiates a sync! When the arrows are swirling in a circle and glowing blue, Evernote is syncing. Rocket surgery.

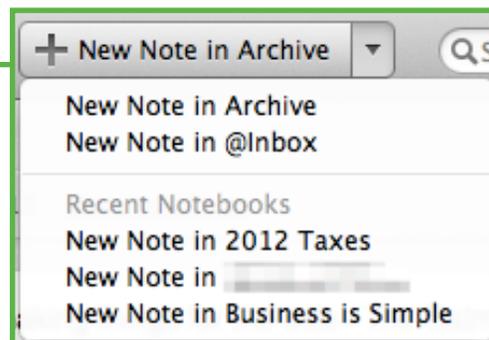
Just to the right, you'll find a fairly new member of the Evernote toolbar that's shaped like a cute little satellite dish. Clicking this little guy will reveal your Activity Stream. Essentially, the Activity Stream is a list of the most recent sharing-related events associated with your account. Some things you might see in your Activity Stream:



- Updates to notebooks shared with you ("Timmy added a new note to shared notebook [name]")
- New notebooks shared with you ("Tommy shared notebook [name] with you")
- New notes or notebooks you've shared ("You shared [note or notebook]")

It will look something like this:

To the right of the Activity Stream is a handy little button-plus-dropdown combo you can use to quickly create new notes. When you activate the dropdown, you'll see something like this:



The options in this menu will be the active notebook (Archive, above), your default notebook (@Inbox), and the last three notebooks you've modified. Clicking any of these options will create a new, blank note in that notebook.

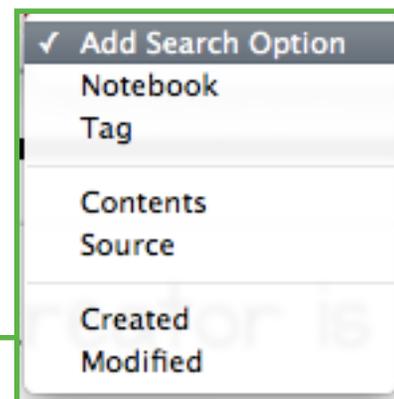
The final step of our left-to-right journey across the toolbar will take us to the Search field. Believe it or not, a *ton* of

improvements have been made to this thing since the last version of Evernote.

When you click into that box (or strike $\text{⌘}+\text{⌘}+\text{F}$), you'll immediately see a list of your most recent searches and all of your saved searches. Pretty spiffy, but there's more.

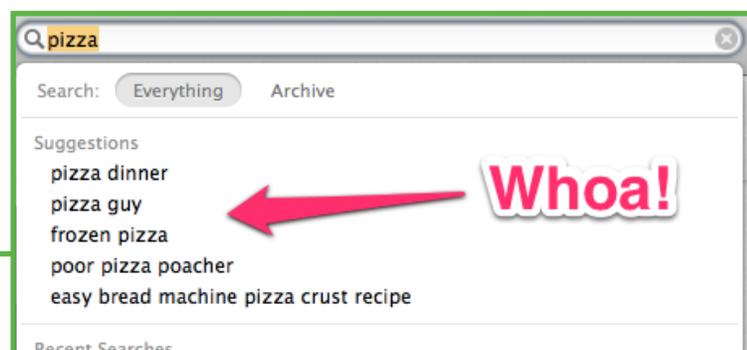
At the top of the lists, you can choose to search your entire account or the currently active notebook. Again, pretty spiffy.

Evernote search has always been really powerful, but now many of the crazy operators (discussed later) are accessible to mere mortals by clicking the "Add Search Option" menu at the bottom of the searches list:



We'll cover all of these options (and how to use them without the snazzy dropdown menu) in the massive chapter on search, but for now, just know that you can easily limit your search to a single notebook, one or more tags, the dates the note was created or modified, etc.

I'd be remiss if I didn't mention the all-new, type-ahead search that ships with version 5 of Evernote for Mac. Click into that search field and start typing. It will immediately begin offering possible matches for your search *as you type*:



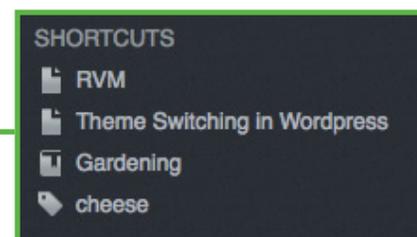
Now *that*, my dear friends, is spiffy.

THE SIDEBAR

No, I'm not talking about a secret courtroom conversation (those might appear in the disclosure chapter).

Along the far left side of the Evernote window is the redesigned sidebar. Let's walk through it together, shall we?

First, we have the Shortcuts area. This is, in many ways, the successor to the Favorites Bar from previous versions of Evernote. The short description: anything you want quick access to (notes, notebooks, or tags) gets dragged into shortcuts and dropped. Here's an example from my account:



Here we have a couple of notes (one about a Ruby thing, one about Wordpress), my Gardening notebook (which is empty because I'm awful at gardening), and I'd be totally lost without my "cheese" tag. Because cheese is important to me. Anyway...

Shortcuts don't need to be permanent. If you're no longer interested in having your "cheese" tag in the shortcuts area, right-click it and choose "Remove from Shortcuts."

Below the shortcuts area, there are a few big buttons:

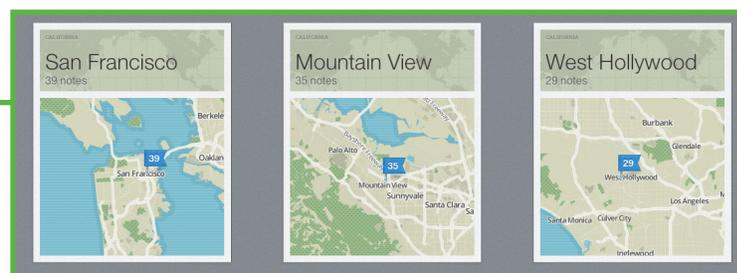
- Notes
- Notebooks
- Tags
- Atlas
- Trunk

The first three are fairly self-explanatory, honestly. Clicking Notes will show you your notes on the right. Ditto for Notebooks and Tags. More rocket surgery!

"What the pete is this 'Atlas' thing?" you might find yourself asking. We'll, I'm going to tell you. Just take it easy.

Atlas is a fun new way to display your notes, organized geographically. Here's a sample from my account:

I routinely visit Northern California (where Evernote's home office is located) and, unsurprisingly, I create notes while I'm there. I don't even really like West Hollywood, but apparently I go there, too.



Essentially, most notes that have location data attached to them will appear in Atlas.

Up until this point, only notes created using Evernote's mobile applications had location data attached to them. Version 5 of Evernote for Mac takes advantage of the geolocation features available in Mac OS X 10.8 (Mountain Lion), so any note you create in Evernote for Mac will have geolocation data included.

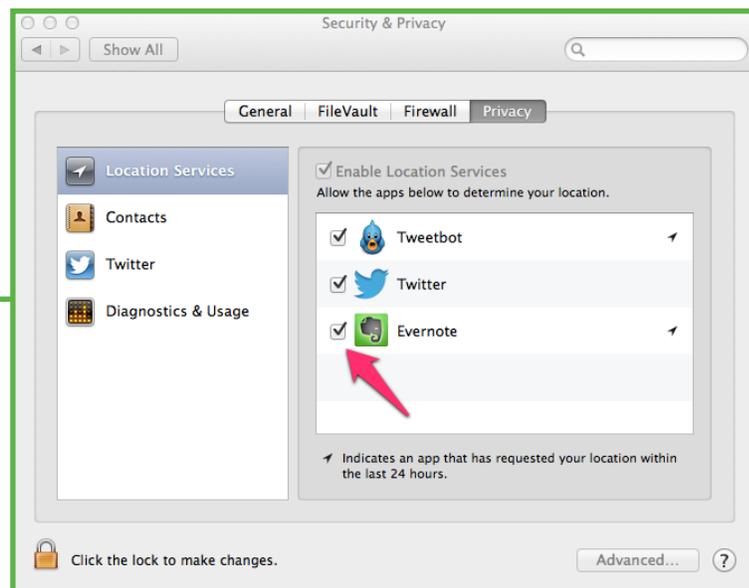
Mac OS X will prompt you the first time Evernote attempts to access your location and you're free to disallow it. If you've allowed it once before and you'd like to disallow it going forward, you can do that by opening System Preferences, selecting Security & Privacy, clicking the Privacy tab, and deselecting Evernote in the Location Services section:

For our final “great big button,” we have the Trunk.

The Trunk is a curated, categorized collection of applications, services, and other goodies that work with Evernote. Poke around in there for cool stuff to enhance your Evernote experience. New stuff is being added all the time, so check back often. Heck, I've personally found tons of cool tools in the Trunk and I *work* at Evernote. Go check it out.

A couple of miscellaneous bits about the sidebar:

- At the bottom of the sidebar, you'll occasionally see a small status bar thingie when the app is syncing, downloading new note content, etc. This is completely normal and nothing to be afraid of (though it will routinely disappear before you can identify what it's doing).
- If you want to display your notebook or tag list in the sidebar, right-click Notebooks or Tags and choose “Show [Notebook or Tag] List.”
- You can hide these big buttons individually by right-clicking one and choosing “Remove from Sidebar.” If you accidentally remove one that you want back, right-click in the blank area below and select the hidden item to add it back into the sidebar.



THE NOTE LIST

If you select a notebook, select a tag, or issue a search, you'll have a big list of notes just to the right of the sidebar we just talked about. Clicking any of these notes will reveal the entire note in the big area to the right of the note list.

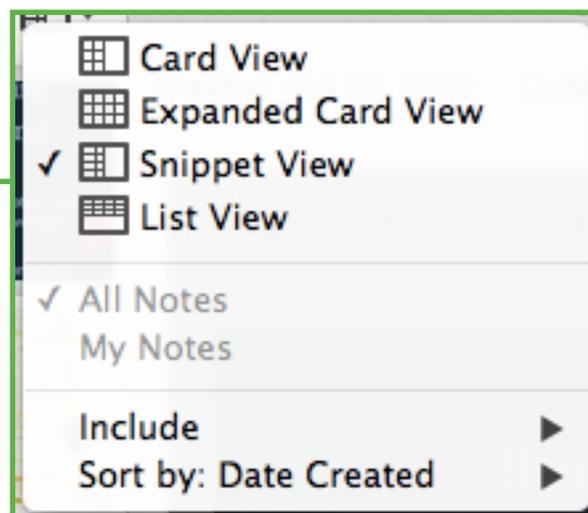
You have a few options for how this list is displayed. Click the small button at the top of the list to reveal this menu:

You can choose to display your notes in Card, Expanded Card, Snippet, or List view. Play around with these a bit and see which one you like (I'm a Snippet-view gal, myself).

Below those options, you'll see "All Notes" and "My Notes." These options are only available when you're viewing all of your notes (which you can do by clicking "Notes" in the sidebar). If you select "My Notes," then notes created by other people—like, say, in a shared notebook—will be hidden.

Next, we have this funny little "Include" menu. Since there are several official Evernote apps you can use to create notes (Evernote Food, Evernote Hello, Skitch), you can choose to include or exclude notes created in these other applications by checking or unchecking them in this menu.

Finally, we have our old pal "Sort by:". As you may have guessed, this option allows you to choose how your notes are sorted. Personally, I keep this at the default option ("Date Created") unless I have a good reason to switch it temporarily. Choose your own adventure here.



THE BIG AREA WE HAVEN'T TALKED ABOUT YET

Finally, we come to the large, nebulous area to the right of the sidebar and note list and below the toolbar.

Depending on what you've last clicked, this area could be full of a few different things. It's a little bit like magic, really.

NOTEBOOKS

If you select “Notebooks,” you’ll see all of your notebooks and notebook stacks. These can be viewed as a grid of snazzy notebook icons or as a list (click the little view button at the top right to change the view). Notebook stacks will look different from notebooks; if you want to view the contents of a notebook stack, just double-click it and it will expand to show you all of the notebooks that live there. Double-click a notebook to view the contents in your chosen note view.

You can also create a new notebook by clicking the “New notebook” button at the top left. Type the name of a notebook in the little box labeled “Find a notebook” to quickly search your notebooks.

For those of us with an absurdly large number of notebooks, we can order them in several different ways using the picker at the top of the window:

- “Owner” will order your notebooks according to who created them. All of your notebooks will appear at the top with any notebooks shared by other users at the bottom.
- Name sorts the notebooks alphabetically by name (yours and those shared with you).
- Count will sort your notebooks according to the number of notes in each with the fullest notebooks appearing at the top.
- Updated places your most recently-modified notebooks at the top of the list and the old, dusty notebooks at the end.

TAGS

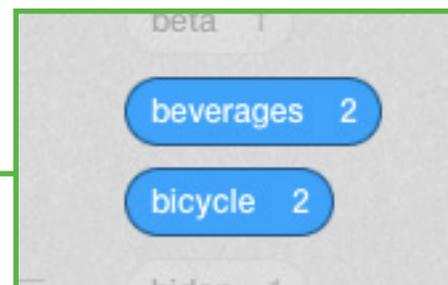
When you click “Tags,” you’ll have all of your tags arranged in a horizontally-scrollable grid. Using the menu at the top, you can add a new tag or search for a specific tag. Clicking

“Name” or “Note Count” will sort the tags alphabetically or by the number of times the tag is used in your account.

By holding the **⌘** key, you can select multiple tags. If any notes contain all of the selected tags, you can jump directly to a list of those notes by clicking the big blue “Show [Number] Notes” button at the top right. Clicking “Clear Selection” will deselect any tags you have selected below.

To create a nested tag (a tag that lives beneath a “parent” tag), just drag what will eventually be the child tag onto the parent tag.

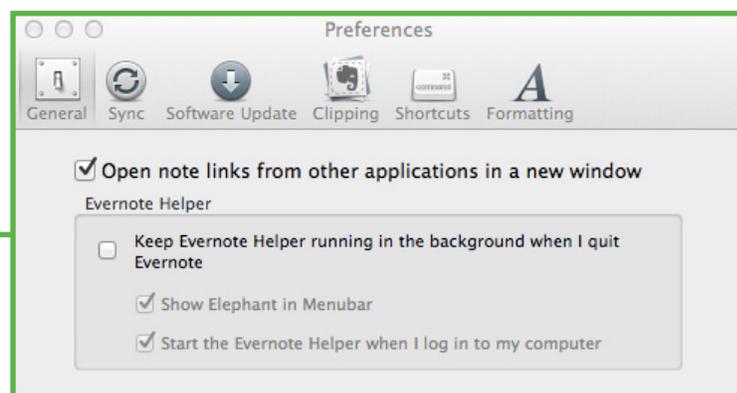
For example, if I wanted to make “beverages” a child tag of “bike” (because there’s a bike cup holder joke in here somewhere), I would drag “beverages” on to “bike”:



And, of course, you can double-click a tag to view all of the notes containing that tag.

PREFERENCES AND KEYBOARD SHORTCUTS

As my great grandfather used to say, “it’s not a full-blown tour if you didn’t explore the application preferences.” Click “Preferences” from the Evernote menu and you’ll see the Preferences window featuring five action-packed tabs. Let’s start with “General”:



Starting at the top, we have “Open note links from other applications in a new window”. If this option is selected, clicking a link to a note from another application (accomplished by using the Note Links feature, discussed later) will create a new window containing that note. If you deselect this option, it will browse to that note in the main Evernote window.

Below that, we can configure how the Evernote Helper application behaves. This is the little elephant icon, visible in the menubar when Evernote is running, that listens for the global shortcut keys (discussed in a second) among other things. By checking the “Keep Evernote Helper running...”

box, we can have this application continue to run even if the main Evernote app isn't running. Evernote is *always* running on my machine so I leave this unchecked. It won't be a huge burden on your computer to leave it running, but this choice is yours to make.

The two checkboxes below “Keep Evernote Helper running...” are self-explanatory. Next, “Sync”:

Our first option controls how often Evernote for Mac will sync on its own. Configure this however you like, but keep a couple of things in mind:

1. Most of the time, syncing will only take a few seconds.
2. The more often you sync, the less of a chance there is of data being lost if your computer explodes or something.

Personally, I have my app configured to sync every 5 minutes (for what it's worth).

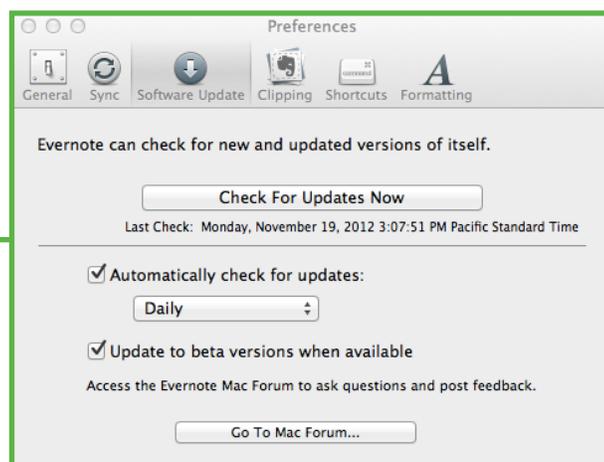
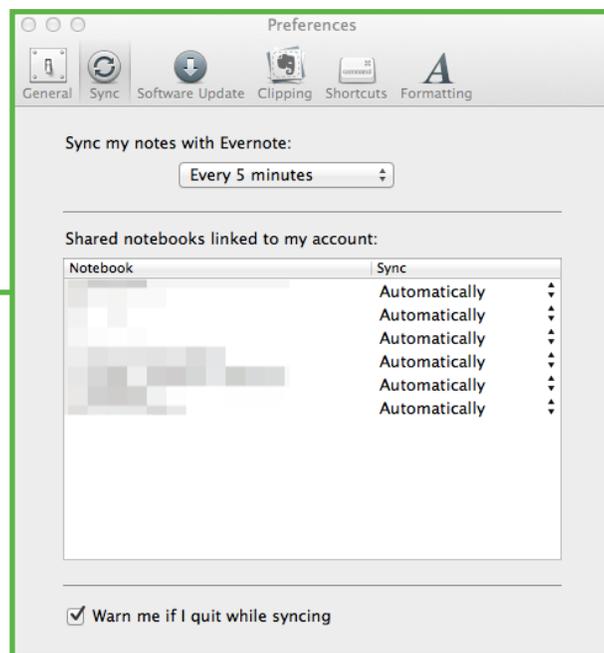
Next, we can individually control the sync frequency of any Linked notebooks we have (notebooks shared by other people with us). Here, you can choose “Automatically,” which is the default, “Manually,” or a handful of different timed intervals. Unless you have a specific reason for doing otherwise, just leave them all set to “Automatic” and everything will be just fine. I promise.

Now, then — let's chat about “Software Update,” shall we?

Evernote for Mac can periodically check for new versions of itself. This screen controls whether and how often this happens, and which versions we're interested in installing.

If you click that great big button at the top, Evernote will compare your current version against the latest version. If a newer version exists, you'll be prompted to install it.

Next is the “Automatically check for updates” box which does exactly what it says on the tin: checks for updates automatically. You can control how often these checks



occur by selecting “Daily,” “Weekly,” or “Monthly” from the dropdown menu. Personally, I like to have the newest stuff, so I leave it set to “Daily” — configure this to your liking (but you should probably just choose “Daily,” if you’re unsure).

Finally, we have the “do you want to use beta versions?” box. With this box checked, you’ll be offered beta versions of Evernote for Mac through the usual update mechanism. This can be cool if you want to see new features or are waiting for a particular bug to be fixed, but using beta software comes with some risk. If the app becomes sentient and eats all of your cheesecake while you’re asleep, you don’t have much recourse. If you don’t know what to do here, leave this box unchecked.

Oh, and there’s a big button at the bottom that will take you to the Evernote for Mac discussion forum. This is a great place to post questions or comments about Evernote for Mac and is regularly perused by helpful Evernote staff and community members.

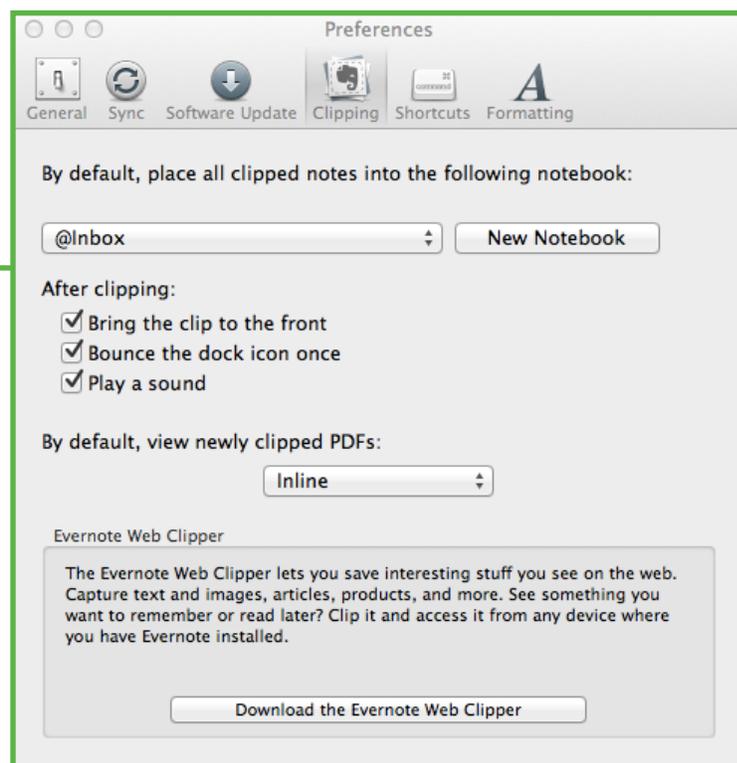
“Clipping”:

“Clipping” is Evernote-speak for “adding stuff to your account.” We’ll talk more about how to clip things in a bit, but this pane lets you control what Evernote for Mac does when you clip something.

The first dropdown controls where newly clipped content goes (remember that “default notebook” stuff from earlier?). This menu, in effect, is another way to select your default notebook. Anything you clip from your computer will end up here.

Next, we’ve got some checkboxes that control what happens when we clip something:

- **Bring the clip to the front** will open a single note view of whatever you just clipped and bring it front and center so you can do stuff with it.
- **Bounce the dock icon once** will cause the Evernote



icon in the dock to do a little soft shoe when you make a new clip. Leave this option checked if this sounds good to you.

- **Play a sound** lets Evernote know that you'd like Evernote play a short audio "beep" sound when you clip new things.

There's no right way to configure any of these; set them however you like and feel confident in your Evernote autonomy!

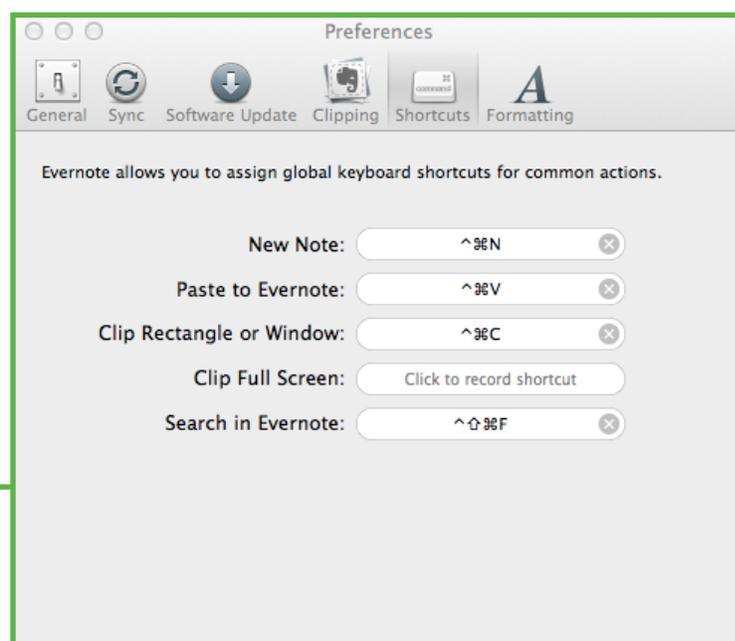
Next, the "newly clipped PDFs" box...

When you add a PDF to a note in Evernote, you can view it one of two ways: as an attachment or "inline." The former option will show you a small box with the filename that you can click to view the PDF. The latter option will render the actual PDF file in the note body. You can change how individual PDFs are rendered (right-click the PDF; choose "View as Attachment" or "View Inline"), but this menu controls the default behavior. Personally, I prefer the inline method.

Finally, we have another great big button to install the Evernote Web Clipper (more on this later). If you don't already have the Evernote Web Clipper installed, clicking this button will launch your default web browser and take you to the page where you can install it.

And now... "Shortcuts":

These options control the global shortcut keys, meaning they're available any time, not just when you're in Evernote:



- **New Note** lets you create a new Evernote note in the active notebook. Strike this keystroke and you're instantly looking at a blank Evernote note.
- **Paste to Evernote** lets you paste whatever you most recently copied to the system clipboard (using **⌘+C** or Edit > Copy) into Evernote.

- **Clip Rectangle or Window** opens a window on top of whatever you're looking at and allows you to draw a box to save that portion of the screen as an image to Evernote, or simply click any window to save that whole window.
- **Clip Full Screen** clips, you guessed it, the entire screen into a new note.
- **Search in Evernote** will switch to the Evernote application and put your cursor in the search box at the top right.

The default options for these keystrokes are probably fine for most people. They can be a little cumbersome to strike because of the hand contortions required, but after a bit of use they'll become second nature. If you want to change any of these keystrokes, click into the appropriate input field and strike the keystroke you'd like to use.

Next, "Formatting":

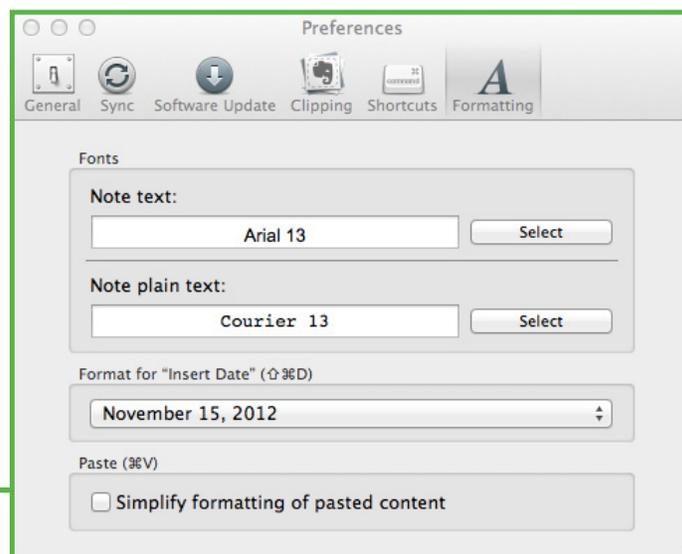
This one's pretty straightforward... or is it?

Fonts are fonts. Many people have their favorites, so choose your favorite fonts for rich and plain text notes. Easy.

You may not realize that you can automatically insert the current date by striking $\text{⌘} + \text{⇧} + \text{D}$. That little dropdown there lets you control how the date looks when you insert it using that keyboard shortcut. Adjust to your liking.

At the bottom, we have a checkbox labeled "Simplify formatting of pasted content." What the heck?

Let's say you're sitting at a coffee shop on Black Friday (the day after Thanksgiving in the US) and you grab some richly-formatted stuff from the web, like this:



Let's also say that you copy that content and paste it into a new Evernote note *without* checking the "Simplify formatting..." box. It would probably look like this:

Now, if we check the "Simplify formatting..." box and paste the same content into a note, it might look like this:

At a glance, these two notes might look very similar (because, really, they are). But there are a couple of subtle differences when you enable simplified formatting: the color of the article body is now black instead of the gray color that appears on CNN.com, the image description has been normalized to look like the rest of the body copy. It's not really obvious in the above example, but all of the text in the note has been converted to "Note Text" font.

Anyway, that's simplified formatting and, rather abruptly, the end of our guided tour of the preferences for Evernote for Mac.

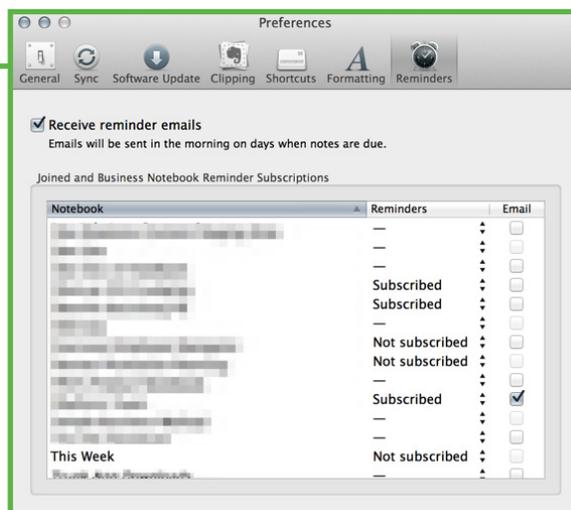
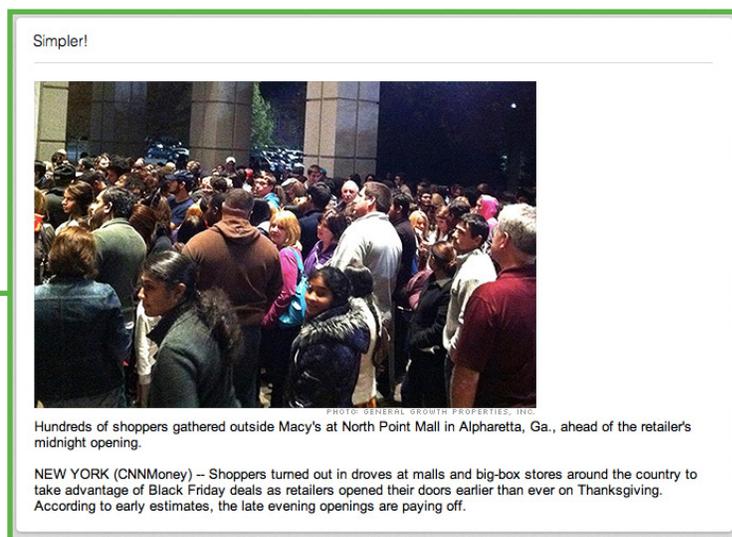
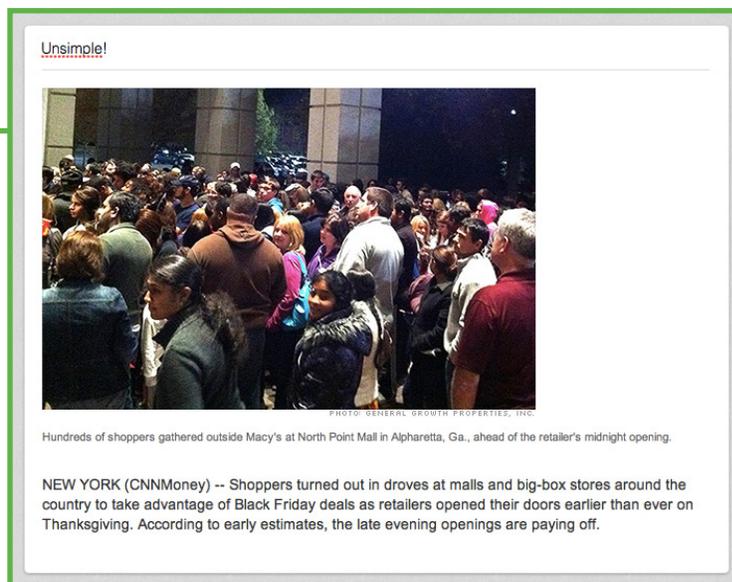
Finally, "Reminders":

(Apologies for all of the obscured info in that image: I'm not what you'd call "a professional")

Reminders will be covered in painful detail in a later chapter, but let's briefly discuss this tab.

At the top, there's a single checkbox: "Receive reminder emails." If you check this box, you'll get a daily digest email containing a list of all reminders due that day. Easy.

Below the checkbox, you'll have a list of shared and Business notebooks. For each notebook in the list, you can choose to subscribe to reminders for that notebook and whether you want reminders for that notebook to appear in your digest emails (provided you check the checkbox at the top).



OTHER KEYBOARD SHORTCUTS

In addition to the global hotkeys we covered a second ago, there are a few new keyboard shortcuts available in version 5 of Evernote for Mac. Unlike the global hotkeys, these are only useful when Evernote for Mac is the active application (when “Evernote” appears in the menubar, in other words):

- **⌘+J** lets you jump to a specific notebook from anywhere in the app. Strike this shortcut and start typing.
- **⌘+⬆+A** takes you to the All Notes view.
- **⌘+^(1-5)** switches you to one of the main views found in the sidebar (1 for Notes, 2 for Notebooks, etc.).
- **⌘+(1-9)** accesses the first nine items in your Shortcuts (1 for the top shortcut, 2 for the second, etc.).
- **⌘+L** takes you to the title field of the current note.
- **⌘+' (that's a single quote)** jumps you to the current note's tags (for editing).
- **⌘+] indents the selected text within the body of a note.**

As I mentioned, version 5 of Evernote for Mac is quite a departure from previous versions, but hopefully this chapter has helped you get familiar with it.

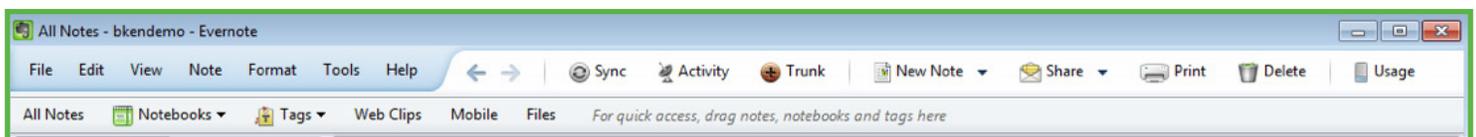
MAN, THAT WAS LONG...

There's your overview of Evernote for Mac. Now, do yourself a favor and go play around with it for a bit and get familiar with where things are. Most importantly, though, is that you have fun (at least, that's what my old man used to tell me).

A Tour of Evernote for Windows

So far, we've been talking all about the *concepts* behind Evernote, but we haven't taken much of a look at the application itself (aside from the single note view described earlier). Let's poke around the Evernote application for Windows a bit, shall we?

Since we're all logical people here (and because I'm an American male who is used to reading left-to-right), we're going to go through the main toolbar in Evernote starting on the left and, you guessed it, working our way to the right. First, though, this is what it looks like by default:



Starting on the left, we have the standard Windows application menus (File, Edit, etc.). These contain most of the options you'd expect to find, so we won't go through them all here — most of the interesting stuff is happening elsewhere. Onward...

The **Back/Forward** buttons do pretty much what you'd expect: take you backward or forward. If you're looking at one note then switch to a second note, Back will take you to the first note and Forward will then take you to the second note. Pretty straightforward; just think of them like you would the Back/Forward buttons in a modern web browser and you've got the basic idea.

Sync lets you manually start a sync operation with Evernote's servers. The arrows will start spinning and turn blue while the sync is happening, then they'll go back to dormant gray when it's over. Not sure how this could be any easier, to be honest.

Free actually introduces a feature we haven't discussed yet: multiple accounts. If you have a personal Evernote account and you decide to create a separate account for work-related stuff, you can have both of them logged into to Evernote for Windows simultaneously. Use this menu to switch between accounts or add a new account. For the latter option, you'll need to create the account on Evernote.com before logging in with it here. This menu also gives you the option to log out of the current account.

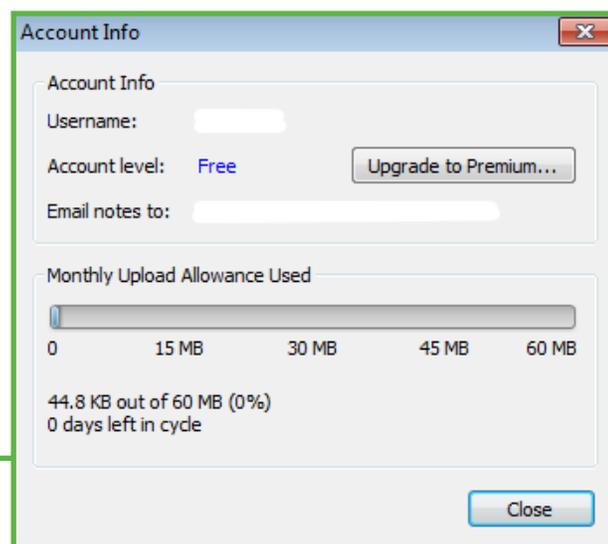
Clicking **Activity** will reveal your Activity Stream. In a nutshell, this is a list of any activity that's happened in your shared Evernote world. If somebody shares a note or notebook with you, it will appear here along with notifications of updates to shared notes and a bunch of other things. If you end up as a prolific sharer, expect your Activity Stream to be, well, active!

The **Trunk** button launches a new window showing you the Evernote Trunk, a collection of software, hardware, and other goodies that all "work with Evernote" in some way. There are tons of great apps in there, particularly for smart phone users. Snoop around and see if anything strikes your fancy.

New Note does just what it says on the tin: creates a new note.

Share is also quite straightforward. Click this item to choose from one of several sharing options (Email, Twitter, Facebook, and others).

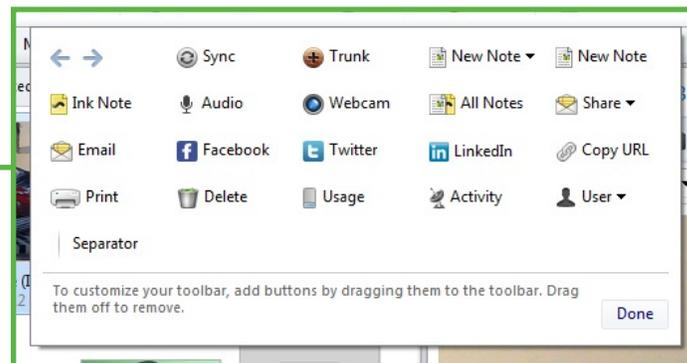
Usage will show you a snazzy little graph of your current month's upload usage. So, if you have a free account (which is given 60 megabytes of upload allowance per month), you'll see how much of that 60mb you've used, when the cycle resets, and other important tidbits about your account:



CUSTOMIZING THE TOOLBAR

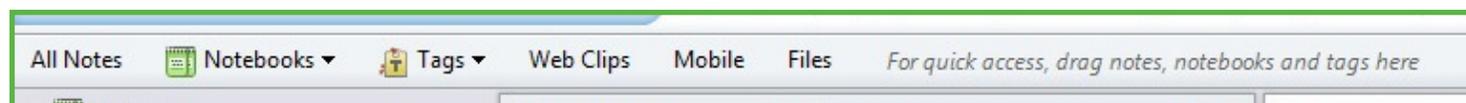
If you're not a big fan of one or more of the default toolbar options, I have good news: you can change them! Select "Customize Toolbar" from the application menus and you'll be presented with this big collection of buttons:

To change or rearrange the toolbar buttons, simply drag them around and drop them where you want. If you want to remove a currently-active toolbar button, just drag it back into the big list. To add a currently-*inactive* toolbar button, drag it out of the list onto the toolbar. Doesn't get much easier than that, if you ask me.



THE FAVORITES BAR

No, I'm not talking about *my* favorite bar — the Favorites Bar is that little strip of real estate just below



the toolbar. It looks like this, by default: Along with the default options (All Notes, Notebooks, etc.), you also have a nice long strip of empty space where you can drag any note, notebook, or tag you want quick access to. How you use this will depend on what kinds of data you keep in Evernote, but it can be super helpful if you have certain notes, etc. that you frequently update.

How about a couple of examples of how I personally use this feature? Ask and you shall receive.

I read a fair number of books. 2012 was the first year in which I made a concerted effort to both read more and keep better track of what I'd read and planned to read. Naturally, Evernote is a great solution for this. I

created a note called “2012 Books I’ve Read” and dragged it to my Favorites Bar. Now, when I get an idea for a book I’d like to read (or if I finish a book), I can quickly jump to that one note in my account and make whatever changes are necessary. I know there are plenty of spiffy online services that help you keep track of books and such, but Evernote serves me just fine.

THE NOTE LIST

If you select a notebook or All Notes on the far left of the Evernote window, you’ll probably see a list of notes. This list can be displayed in one of three different views: List view, Snippet view, and Thumbnail view. Let’s quickly cover each of these.

When **List** view is active, the note list appears above the note preview pane and looks like this:

Created	Updated	Title
3/29/2012 4:12 PM	3/29/2012 4:12 PM	Skitch image (IMG_20120329_171137.jpg)
2/22/2012 3:59 PM	2/22/2012 4:00 PM	My Evernote Hello Profile
2/22/2012 3:59 PM	2/22/2012 3:59 PM	Welcome to the Evernote Hello
1/31/2012 10:30 AM	1/31/2012 10:30 AM	Note @ Fullerton, California
2/23/2012 10:08 AM	2/23/2012 10:08 AM	Skitch snapshot
1/31/2012 11:29 AM	1/31/2012 11:29 AM	Audio recording @ Fullerton, California
3/29/2012 1:32 PM	3/29/2012 1:32 PM	Audio @ Fullerton, California
11/22/2011 12:03 PM	1/24/2012 5:12 PM	Attachment:New Pic
11/8/2011 1:55 PM	11/8/2011 1:55 PM	Foo

This view is easily the most Spartan of the three. It (obviously) contains zero visual information about the note and is optimized for viewing the longest list of notes in the smallest amount of screen space.

If you choose **Snippet** view, then the note list will appear to the left of the note pane and will get you something like this:

The snippet view displays a list of notes with preview images and text. The notes shown are:

- Skitch image (IMG_20120329_171137.jpg)**
3/29/2012
SkitchImage0.png, 1.2MB
- My Evernote Hello Profile**
2/22/2012 email: _____ Greeting:Hello Thank
You:Pleased to meet you! Send my contact email:1
- Welcome to the Evernote Hello**
2/22/2012 Evernote Hello Feb 22, 2012 3:59:58 PM
Remember people, encounters and shared experiences, then find them later with Evernote He...
- Note @ Fullerton, California**
1/31/2012 Testing things?
- Skitch snapshot**
2/23/2012
Skitched-image0.png, 1.5MB

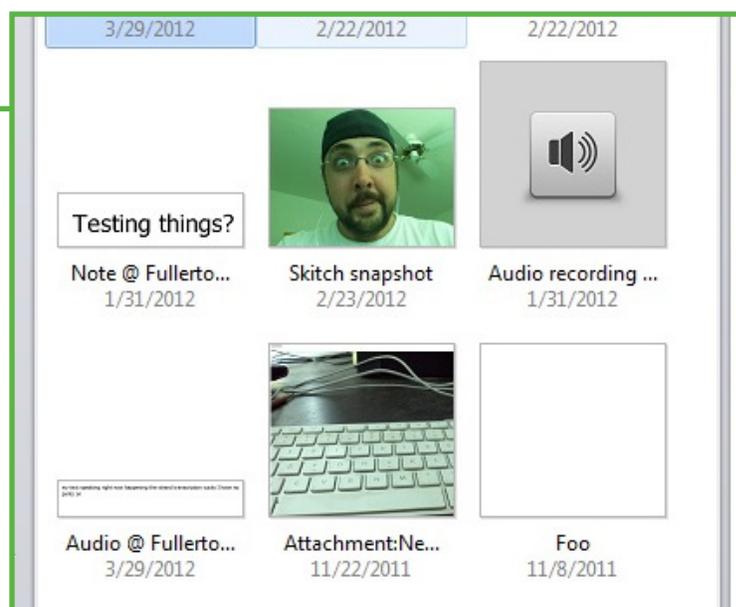
As you can see, each note in this list has a bit more breathing room, as well as some visual indication as to what it contains. And, if you’re particularly unlucky, you’ll end up with multiple photos of that weird looking guy who happens to be the guy typing these words!

Finally, we have **Thumbnail** view, which boasts an almost-completely visual (as in, non-textual) interface to your notes:

If many or most of your notes contain photos or some other imagery, you might find a comfy home with Thumbnail view.

So, those are the view options. Naturally, choose the one you like best. Personally, I'm a Snippet view gal (if you're wondering).

Now let's look at that big list-like thing running down the far left-hand side of the window, which I affectionately call "The List."



The List gives you access to everything in your Evernote account: notebooks, tags, saved searches, and a new partygoer we haven't met yet: Attributes (more on those in a second). Each section can be expanded or collapsed by clicking the little triangle next to the name.

We spoke about notebook stacks earlier and they're front and center in the Notebooks section of the sidebar. If you see a little triangle next to something in the Notebooks section, that's a notebook stack. Easy as pie. And, again, if you want to create a stack, just drag one notebook on to another and rename the stack it creates (right-click > Rename Stack). If you want to add a notebook to a stack, drag it onto the stack and release. Want to remove a notebook? Drag it on to All Notebooks at the top of the list and release.

Tags work similarly, as they can be "nested" within other tags. Just like with Notebook Stacks, this organizational technique exists purely as a visual aid to you, the fetching user. If you have a tag called "Food," you might want to add the tags "Thai," "Tex-Mex," and "Italian Fusion" as child tags. How you do it is up to you (or if you even do it at all, since you don't have to if you'd rather not). To nest one tag within another, just drop the child tag on the parent tag. So, using the above example, you'd drag "Italian Fusion" onto "Food."

Next is the Saved Searches section. This one's easy: if you have a saved search in your account, it will appear in this list.

To run the saved search, just click it. You can edit, rename or delete saved searches by right-clicking them. Simple.

Finally, we have **Attributes**. These behave a lot like saved searches, but are built into Evernote. Here's what the list looks like when (mostly) expanded:

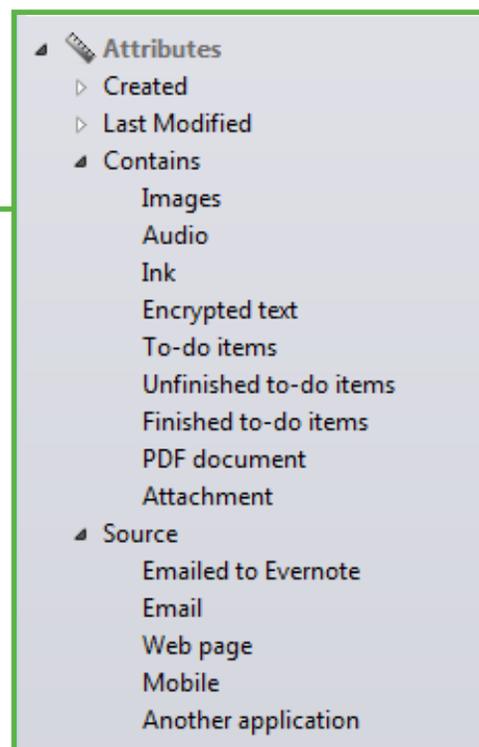
“Created” and “Last Modified” deal with, and I’m totally serious, the dates your notes were created or modified. If you select “Yesterday” under the “Since” section, you’ll get all of the notes created (or modified) since yesterday. Those are pretty easy to wrap your head around. The more interesting sections are below “Created” and “Last Modified,” if you ask me: “Contains” and “Source.”

“Contains,” as is probably obvious from looking at the options, lets you filter your notes based on what’s inside them. Clicking “Image” will filter the current set of notes such that only notes containing images are shown. All of the other options under “Contains” will do the same.

“Source” lets you filter your notes based on how they got into your account in the first place. If you want to see all of the notes you emailed to your account using your snazzy Evernote email address, click “Emailed to Evernote.” Pretty self-explanatory.

One more thing, though. Actually, two more things. And these are very awesome.

1. You can select three attributes at once: one dealing with the date (either “Created” or “Last Modified”), one “Contains”, and one “Source.” This means that you can, in effect, tell Evernote that you only want to see notes created in the last week using your mobile phone that contain an image. *That*, my fine feathered friends, is cool.
2. When you select one or more attributes to use as filters, they are used to filter **only the notes that are currently visible**. In other words, if you’ve run a Saved Search that resulted in only a handful of notes, then selecting stuff under Attributes will filter only that handful of notes by the criteria you select.



These options may seem a bit cryptic at first, but play around with them. Being able to quickly slice and dice your notes is some serious power-user stuff (and, between you, me, and the lamppost, is not hard at all once you get the hang of it).

ADS

If you're a Premium subscriber, you have the option to disable the small promotional images that appear at the bottom left corner of the window. Personally, I have them hidden, but do whatever your heart tells you here. If you have a free account, you're pretty much stuck. One thing, though: ads have been completely removed from Evernote for Mac, regardless of account type. I wouldn't be surprised to see the same thing happen to Evernote for Windows at some point in the future.

IN CONCLUSION...

If you're just starting out, this list of stuff is going to be pretty small (one or two notebooks, a handful of tags, maybe a saved search or two), but it should help tie together some concepts described elsewhere in this guide (nested tags, notebook stacks, etc.).

The most important thing is that all of this stuff be organized such that *you*, my handsome friend, find it useful. Don't be afraid to get your hands dirty here; short of deleting things, you won't permanently destroy anything.

Adding Stuff to Evernote

A big part of what makes Evernote such a powerful and useful application is the ease with which you can add things to it. We got a peek at some of these capabilities in a previous chapter when we looked at the global shortcut keys, but it goes way beyond that, my friends.

Let's look at each of the ways you can add stuff in greater detail — and who knows, maybe we can find some little hacky tricks along the way! But first, let's talk for a minute about what kinds of things you can store in Evernote.

Obviously the primary type of content you'd toss into Evernote would be some form of text — content from web pages, emails, and other documents you want to lock away forever. You can also give it images, PDF files, even whole web pages. The deal gets even sweeter since you can add any file to Evernote and it'll be synchronized across all of your machines and devices. This is especially useful for things like the Time Off Request Form from HR and the electronic user manual for your new adjustable bed that happens to be formatted for Microsoft Word.

But how, pray tell, are we to quickly and easily get our entire digital lives into Evernote? Read on.

DESKTOP CLIPPING

If you're using Evernote on your desktop in either Windows or OS X, adding content to Evernote is a piece of cake. In fact,

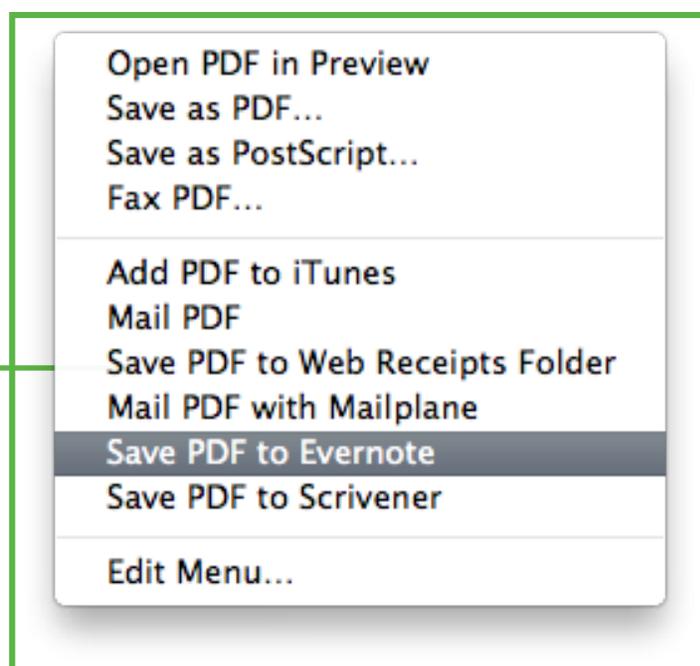
you're already very familiar with the first half of the process — copying things to the system clipboard using Ctrl+C or ⌘+C. Once you've got something in the clipboard, you can use your global Paste to Evernote keystroke to shove it into a fresh new note in the active notebook. This will work with text and image clippings, as well as any file type, provided the file isn't bigger than the maximum size of a note (Free: 25mb; Premium: 100mb).

Aside from using the system clipper, you can also drag content from just about any application onto the notebook where you'd like the note created. The latest version of the Evernote application for Windows also adds an “Evernote” option to the “Send To” context submenu in Windows Explorer.

If you're using OS X, you have another option for adding content to Evernote that's available in just about every application that allows printing. If you click File > Print in your favorite app, you should see a “PDF” menu on the bottom left corner. Drop that guy down and choose “Save PDF to Evernote” and, presto, it's clipped:⁸

The reason this option is only available on the Mac is that OS X has low-level operating system support for creating and rendering PDF files whereas Windows does not. If you have Adobe Acrobat installed on your Windows machine, you can choose “Adobe PDF” as the printer when printing a document and save the resulting PDF to Evernote. While this solution does produce the desired result, it is a rather cumbersome workaround.

Another neat feature specific to the Mac is the ability to drag and drop files directly onto the Evernote icon in your Dock. This action will result in that file being added to a new note in your default notebook. You can also drag multiple files onto the Dock icon at one time and they'll each be added to their own individual notes in your default notebook. If you'd like to add multiple files to a single note, just create a new note



⁸ This feature is not included when you download Evernote from the Mac App Store, but it can be added manually. [This forum post](#) describes how to do it.

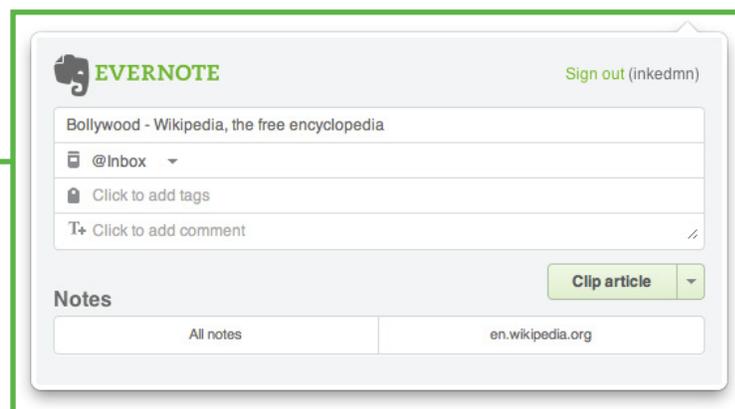
by dragging your files into the body of the note and dropping them.

CLIPPING FROM YOUR WEB BROWSER

Since most of us spend a great deal of time in our web browsers these days, the Evernote engineering team rightly spent a great deal of time working on adding content to Evernote from the browser in a seamless and frictionless manner. Evernote offers plugins or extensions for several browsers in addition to the Web Clipper bookmarklet that you can use in virtually any modern browser. The four most popular desktop browsers in use today—Safari, Mozilla Firefox, Google Chrome, and Internet Explorer—each have their own, native Web Clipper. Let's take a closer look at 'em.

GOOGLE CHROME AND SAFARI

Because Google Chrome and Safari share the same plumbing (they're both based on an open source browser called Webkit), their Web Clippers look and behave essentially the same. After you've installed the Web Clipper in either Chrome or Safari, you'll have a little elephant icon in your browser's toolbar. Clicking said elephant while viewing a web page will spawn a handsome little window that looks like this:



As you can see, I clicked the elephant while reading the Wikipedia page on Bollywood (I'm a fan and I'm not even a little sorry), so we've got the page title already filled in, as well as my personal default notebook (@Inbox). I can also add tags or an additional comment if I so desire.

But there's more to this seemingly innocent pop-up than meets the eye...

See where it says "Clip article"? Well, that's actually a drop down menu that, depending on the web page you're trying to clip, can provide several different options:

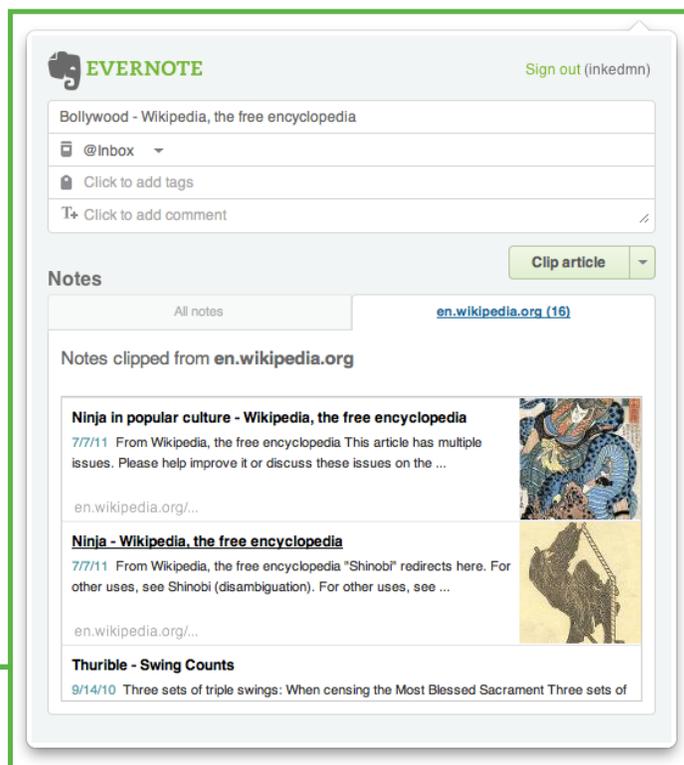
- **Clip article** — If this option is selected, Evernote will attempt to figure out which part of the page you intended to clip and only grab that part. For example, if you're reading a blog post that's surrounded by a bunch of advertisements, navigation elements and other cruft, the Evernote Web Clipper will only highlight the text of the article (or, at least, its best guess as to the text of the article). It won't work perfectly every time. But, Chrome users can use their keyboards to grow or shrink the area to be clipped. If the clipper can't figure out which part of the page is the main part, this option won't appear in the drop down.
- **Clip selection** — If you highlight any part of the web page before invoking the clipper, that's exactly what will be clipped if you choose "Clip selection."
- **Clip full page** — Just like it says on the tin; if you click this option, you're going to get the entire page.
- **Clip URL** — This option will not save any part of the web page, but create a new note with the web page's URL as the Source URL field and the page title as the note title.
- **Clip PDF** — Unless you're looking at a PDF in your browser, this option won't be available. If you *are* looking at a PDF, you can clip the whole thing into your Evernote account using this option.

Better than a sharp stick in the eye, right? And we haven't talked about those two buttons at the bottom!

On the left, you have "All notes" — clicking that guy will show you a miniature view of all of the notes in your Evernote account. You can search them from within that impossibly tiny little window and any note you choose will be opened on Evernote's web interface.

On the right, you've got the domain name of the web page you're viewing (en.wikipedia.org, in this case). Clicking there will show you all of the notes you've clipped from that domain in the past:

And as you can see, I like ninja. Again, not sorry.



MOZILLA FIREFOX

The Web Clipper for Firefox is a bit leaner than the Chrome and Safari Clippers, but it's still quite useful. Invoking the Firefox clipper on a web page will give you these three options:

These options all work the same way as the similarly-named options described in the previous section: "Clip article" grabs only the part it thinks is actual content, "Clip full page" grabs everything and "Clip URL" just saves the page's URL.

One thing to bear in mind, though: if you have any portion of the page selected when you invoke the clipper, that portion of the page will be immediately clipped without any further input from you. The good news, though, is that this clipped portion of the page will immediately appear in a new Evernote note on your desktop (assuming you have the Evernote application installed, of course — otherwise the clip is sent to your account via Evernote Web), so you won't sit there wondering why the clipper isn't doing anything.

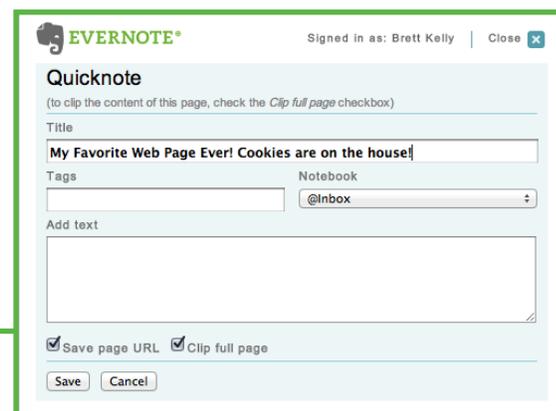


INTERNET EXPLORER

To clip content from within Internet Explorer, you must highlight a portion of the page first, right-click it and choose "Add to Evernote". A dialog box will appear that will let you add tags, change the title and other such like. But, I'm afraid that's the extent of this clipper's features.

ALL THE REST

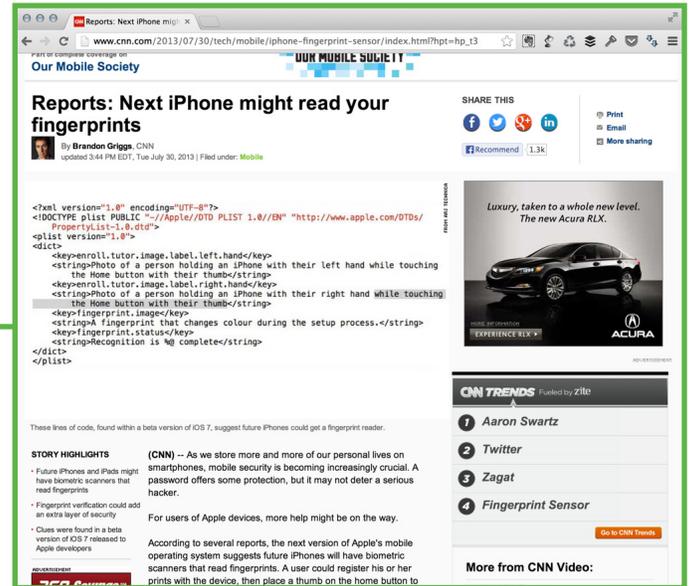
If your favorite browser hasn't been mentioned yet, don't despair. Just about any modern web browser is capable of utilizing the Web Clipper bookmarklet. Head over to the Evernote downloads page for the bookmarklet and drag it to your browser's bookmark bar. Once it's installed, you can click it and you'll be presented with this:



EVERNOTE CLEARLY

Evernote Clearly is a separate browser extension available for Google Chrome, Mozilla Firefox and the Opera web browser. It's primary function is to remove everything from the web page you're looking at except the part you want to read. It's similar to the "Clip Article" option in the Chrome/Safari clipper, but much better at removing cruft.

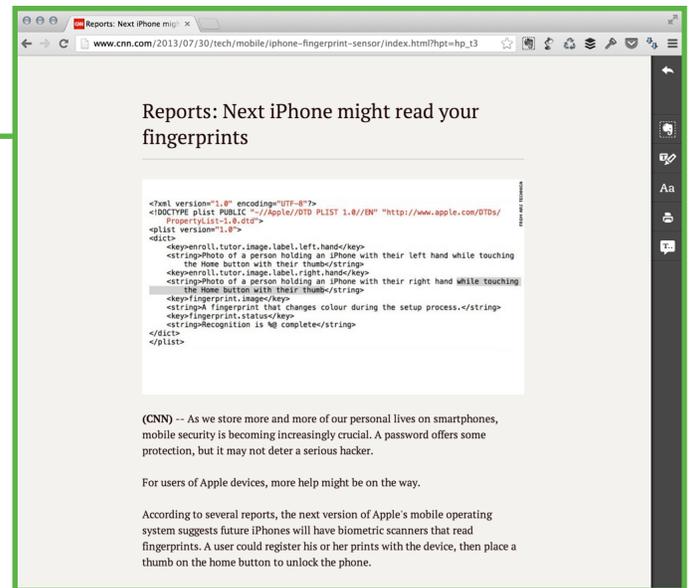
Here's a web page from CNN.com:



Here's the same page after activating Evernote Clearly:

Not bad, right? In the second screenshot, notice the small row of buttons at the right of the screen:

- Clicking the elephant will clip the article into your Evernote account.⁹
- The button that looks like a highlighter lets you highlight portions of the article before it's clipped (and the highlights will appear in the resulting note).
- The pair of A's let you control the "theme" used by Clearly; choose from several pre-defined combinations of text color and size and background color, or define your own.
- I'll let you guess what the printer icon does...
- The text bubble will play an audio version of whatever is on the screen. It works surprisingly well.



I use Clearly every single day and, honestly, it's one of my favorite Evernote products. It does one thing very well.

So, there's an overview of the different clipping capabilities for modern web browsers. I'd recommend installing any extensions available for your chosen browsers as they really

⁹ You can configure which notebook, tags, etc. are used when the selected article is clipped. Alternately, you can let Evernote choose the tags and destination notebook automatically using a feature called "Smart Filing."

do make adding web content to Evernote a snap. And, don't forget, you can clip text as well as images using any of these clipping tools!

EMAILING TO EVERNOTE

When you create an Evernote account, you're assigned a special email address that you can use to send content to Evernote from any email client. It's as simple as it sounds: send an email to Evernote and it gets added to your default notebook with the subject of the email as the note title and the body as, well, the body of the note. But let me tell you, it goes way beyond that, Freddie. Way.

To start, grab your special Evernote email address. The easiest way to find this is to either look in the Account portion of whatever app you're using or visit [Evernote.com's Settings area](#) and look for the email address. (Hint: create a contact in your computer's address book called "Evernote" with your super spiffy email address for easy forwarding, especially from your mobile device). It will look something like this:

```
username.abc123@m.evernote.com
```

Anything you send to this email address will go right into your default notebook, including attachments. Slick.

NOTEBOOK, TAG, AND REMINDER MAGIC

But what if you want to have a specific email end up in a specific notebook? Or maybe add a tag or two? Create a reminder? No problem. Here's how you do it.

In the subject of the email, add the name of the notebook where you'd like this thing to land prepended with the @ symbol. For tags, prepend those with the # sign. To add a reminder, add an exclamation point (!). If you'd like your reminder to have a date, you can include it using this format:

!YYYY/MM/DD (e.g., !2013/07/30).

For example, if I have an email receipt from Amazon.com that I want to store in my Finances notebook with the tags “Amazon” and “receipts” with a reminder (without a date), the email subject line should look like this before sending it to Evernote:

```
Your Amazon.com Order (StuffThingsRandomOrderNumber) @  
Finances #Amazon #receipts !
```

Send that bad boy and it'll end up right where it should, tagged and everything.

As with everything, though, there are a couple of caveats:

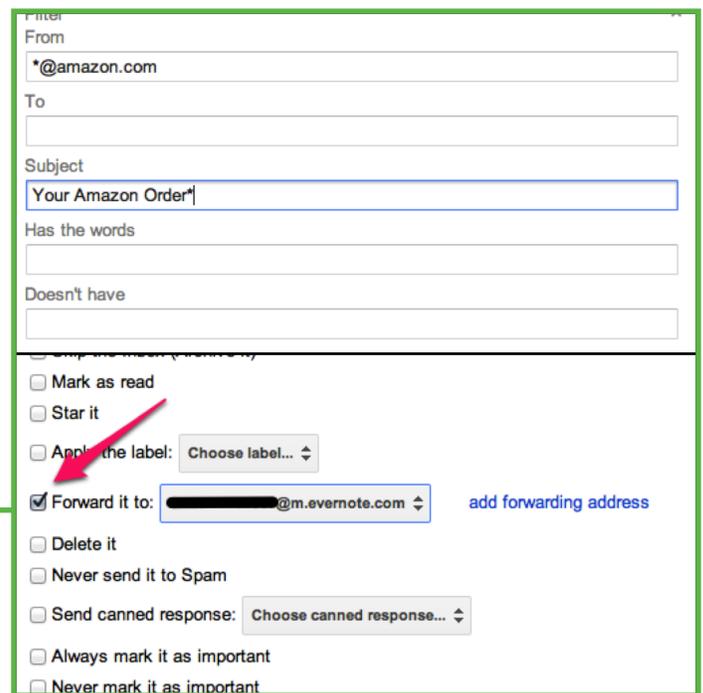
1. The notebook and tags must already exist in your Evernote account. Emailing notes with nonexistent tags or notebooks will not create either the notebook or the tags.
2. The notebook name must come before the tags.
3. If you mistype either the notebook name or tags, then they will remain in the note title after it's imported. In the case of the phantom notebook, the note will be created in your default notebook.
4. This feature won't work for notebooks whose names include the @ symbol or tags that include the # sign.

Bonus Tip: If you use a text expansion utility (such as TextExpander for Mac or Breevy for Windows), you can save time by creating snippets for common notebook-and-tag combinations. For example, I send a lot of email receipts to Evernote for expenses I'll want to deduct during tax time and I want them filed and tagged in a specific way so I can find them later. So, I created a snippet in TextExpander that quickly becomes the correct notebook and tag combination. When I type “;;entax” at the end of an email subject, that text quickly becomes: “@Archive #receipts #tax-deductible #[current year]” (without the quotes or brackets). If you find your self regularly emailing the same kinds of things to Evernote, this might be a tactic you want to consider employing.

EMAIL FILTERS

One of the most obvious use cases for Evernote is as a repository for things like receipts and other notifications that you'd like to keep forever. Surely manually forwarding these messages can't be the most efficient way to get them into Evernote, right? Check this out.

Just about every email application (web or desktop) has the ability to perform actions based on the characteristics of the message. For example, in GMail, any email sent to me by my wife automatically gets a special label so I can easily find all of her messages later. What if we could do some cool stuff with these types of filtering mechanisms to remove some friction from our Evernote workflow? Well, you'll be happy to know that doing this is pretty straightforward as well. Let's say you wanted to make sure all of your Amazon receipts are automatically sent to Evernote as they arrive. In GMail, you'd create a filter like this:

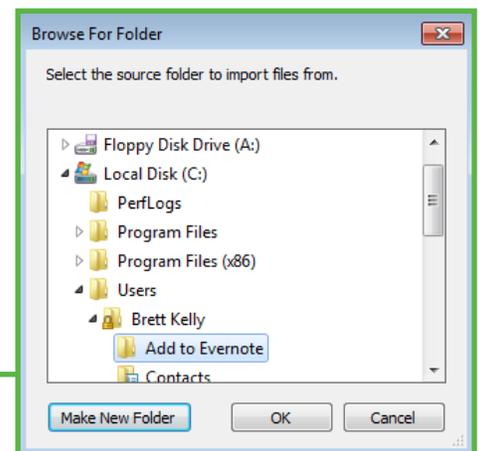


With this filter in action, any email I get from amazon.com (no matter what the "name" part of the email address is) whose subject begins with "Your Amazon Order" will automatically be forwarded to my Evernote email address. If that's not snazzy, then I don't know what is.

IMPORT FOLDERS

Note: this feature is currently only available under Windows

You can configure Evernote for Windows to watch certain folders on your computer and add anything that shows up in those folders to your account. To add an Import Folder, select "Import Folders" from the Tools menu. When the dialog box appears, click "Add" and you'll be asked to choose a folder somewhere on your computer. Personally, I like to create a dedicated folder for this purpose:



After you choose your folder, you have a few options (click to modify them):

- **Subfolders** — If this option is set to “Yes,” then any items in subfolders within this folder will be added to your account. In other words, if you drag a whole folder full of stuff into this Import Folder, everything in the dragged folder will be added.
- **Notebook** — Notes imported from this folder will end up as new notes in this notebook.
- **Resource** — “Keep” means that, once a file is added to your Evernote account from this folder, it will be left alone. “Delete” means that, after it’s added, the file will be deleted. The latter option makes more sense to me, but if you’d rather set it to “Keep,” be my guest.

The usual rules apply here: the file can’t be larger than the maximum size of a note given your account type (free: 25mb; Premium: 100mb).

MAC WORKAROUNDS

Even though Evernote for Mac doesn’t officially support Import Folders, there are ways of approximating the same functionality. The easiest way (I think) is using a third-party application for the Mac called Hazel. If you’re interested in making this stuff work on your Mac (and are maybe a little geeky), my pal Brooks has written a nice tutorial on how to do this over at DocumentSnap.com.

DESKTOP SCANNERS

Many desktop document scanners support scanning directly to Evernote. Personally, I’m a big fan of the ScanSnap scanners by Fujitsu (which we’ll talk about more in the Paperless section), but you can find several options in the [Evernote Trunk](#).

The specific options and configuration for the various types of scanners available are beyond the scope of this guide, but know

that if you're looking to digitize all that paper that's littering your desk and keep it in your Evernote account, then a nice document scanner will be a big help.

TWITTER

This feature isn't something I personally use very much, but it's worth discussing here, if only briefly.

If you're a Twitter user and you start following @myEN, the account will automatically follow you back. From there, if you send a direct message (DM) to myEN from your Twitter account, the contents of the message will be added to your Evernote account in your default notebook.

Also, if you mention [@myEN](#) in any public Tweet, said Tweet will be saved to your Evernote account. If this sounds interesting to you, check out [this blog post on the Evernote blog](#) which describes how to set this up.

CONCLUSION

In case it wasn't painfully obvious, there are *many* ways to add content to Evernote. Now that you know how to do it, go add some stuff!

More Than You Ever Wanted to Know about Evernote Search

The most basic way to search Evernote is by plugging a few words into the little search box and getting some results. While this is perfectly acceptable for most occasions, a great deal more power exists beneath this simple exterior in the form of operators, which we'll cover in this chapter in *excruciating* detail.

If you want to read the full developer documentation for Evernote search, visit the [resources page](#) or search Google for “Evernote Search Grammar.”

OPERATORS

Operators, in this context, are words that are used as a way of indicating that the text that follows them should be used in a specific way. They are similar to Google's search operators in this way. For example, if you type “tag:foo” into the Evernote search box, you're telling Evernote that you want to see notes that are tagged with “foo”. Most of the operators described below work the same way, though some of them don't require you to add anything (“encryption:” by itself searches for notes that contain encrypted regions, for example).

Evernote search operators share common form and logic. If you want to find all of the notes that have a certain attribute,

you'd search with "operator:". For all notes that don't have that attribute, prepend your statement with a minus: "-operator:".¹⁰ Pretty simple, right? Let's take a look at each of the available operators:

any — Because this is going to come up a lot during this section, we're going to cover it first. The "any:" operator converts your search from an "AND" type search into an "OR." For example, let's say you perform a search with the following terms:

```
cumin waffle recipe
```

This will return all notes that contain all of the words "cumin," "waffle," and "recipe." If we add the "any:" operator to the previous example, we'll have this:

```
any: cumin waffle recipe
```

Now, this search will return all notes that contain any of those words (instead of notes that have all of them, like the previous search). Note that, if you use "any", it must be the first term in your search (with one exception that we'll talk about in a second).

tag — Obviously, this operator lets you search for notes that have (or don't have) a specific tag. For example:

```
tag:waffles
```

This will match all of the notes in the active notebook (or all notebooks, if that's selected) that are tagged with "waffles." Another:

```
-tag:waffles
```

This will match all of the notes that are not tagged with "waffles" (which, for me, isn't many). Easy, right? But what if your tag contains spaces? Equally easy — simply wrap the tag text in a set of double quotes:

```
tag:"cumin waffles"
```

¹⁰ There are two exceptions to the "minus operator" rule: a minus before the "notebook" and "stack" operators will be ignored.

As you've probably already figured out, this will find all of the notes tagged with "cumin waffles" (I have at least 30). You can also combine more than one instance of tag to further narrow your search:

```
tag:"cumin waffles" tag:recipes
```

This search will return all (because, surely, you have at least a couple) notes tagged with "cumin waffles" and "recipes." You can also negate any of the tag: operators using -. What if we want to see all of our recipes and all of our cumin waffle-themed notes? No sweat:

```
any: tag:"cumin waffles" tag:recipes
```

notebook — If you want to narrow your search to a single notebook, here's your huckleberry. This operator is special among the others in a couple of ways.

First, it can only appear once in your search (unlike tag: and others). For instance, this would be an invalid search:

```
notebook:Inbox notebook:Archive tag:"cumin waffles"
```

If you perform a search like this, the results will be limited to the notebook referenced in the rightmost notebook: operator ("Archive," in this case).

Second, the notebook operator must also appear first in any search you perform. This is the exception to the rule about the "any:" operator being first in your query. For example:

```
notebook:Archive any: cumin waffles
```

This search will yield all of the notes that contain the word "cumin" or the word "waffles" in the Archive notebook.

stack — To search only within a specific notebook stack, use this operator. Example:

```
stack:Financial 401(k)
```

A couple of potential gotchas to keep in mind with regard to the stack operator:

- If your search contains instances of both the notebook and stack operators, the stack operator will be ignored — even if the stack operator appears first in the search text.
- Using multiple instances of the stack operator will result in all but the first being ignored.

And, as with several other operators, wrap the stack name in quotes if it contains one or more spaces:

```
stack:"Cumin Waffles"
```

inTitle — This operator does just what the name implies — searches the title of your notes:

```
inTitle:cumin
```

This search will return all of your notes that have the word “cumin” in the title. It works just like the rest as far as adding a minus, quoting strings with spaces, etc.

created — Using this operator allows you to search for notes created on and after a specific date and time. This one is especially hairy because of the way the date and time must be expressed. For example, the following will not work:

```
created:"March 10, 2013"
```

No, instead you need to provide the date and time as expressed in only numbers. The format for this is YYYYMMDD (year, month, day). So, for our previous date example, you’d need to do something like this:

```
created:20130310
```

This would give you all of the notes created on or after that date. If you want to find notes that were created on exactly March 10, 2013, this would do the trick:

```
created:20130310 -created:20130311
```

This search, when expressed in human English, says: “Give me all of my notes created on or after March 10, 2013 but not on or after March 11, 2013.” It’s a roundabout solution, but it gets the job done.

If you’re feeling particularly playful, you can also supply a timezone since, by default, the date and time given are relative to the time zone of the user running the search. If you’re thinking “I can’t imagine ever needing to use this,” you’re not alone. If you want to get the full write-up on the dates and time with timezones usage, see the developer documentation link at the beginning of this chapter.

There are a few more options available for **created:** that are suitable for mere mortals:

```
created:day-1
```

This matches notes that were created yesterday or today. You can substitute “week”, “month,” or “year” for “day” here and still have a valid search. If you want to see all of the notes created in the last two months, issue a search like this one:

```
created:month-1
```

Or notes created 3 months ago:

```
created:month-3 -created:month-2
```

You get the idea.

updated — This operator works exactly the same as **created:**, but applies to the date a note was updated. If you haven’t ever updated a note since creating it, the two dates will be the same.

todo — This matches notes that contain the checkbox element. These searches returns notes that have checkboxes

that are checked, not checked, and checkboxes in either state, respectively:

```
todo:true // checkboxes that are checked
todo:false // checkboxes that are not checked
todo:* // checkboxes that are either checked or not checked
```

sourceUrl — This operator will let you search for notes that were clipped from a specific website or web page. If I want to see all of the notes I've clipped from Wikipedia, I'd issue a search like this:

```
sourceUrl:http://en.wikipedia.org/*
```

(Remember that not all notes will have this attribute set.)

resource — This operator allows you to search for notes that contain a file of a certain MIME type. If you have no idea what that means, you can read about MIME types on [Wikipedia](#).

To search for notes that contain GIF image files, you could issue the following search:

```
resource:image/gif
```

Or perhaps you want to find all the notes that contain audio files:

```
resource:audio/*
```

We haven't yet covered wildcard characters like the asterisk we just used, but this search is looking for any note containing any audio file, regardless of subtype (mp3, wav, etc.).

The full list of possible MIME types is beyond the scope of this book (there are hundreds of them), but a quick Google search will help you determine the MIME type of the file you're trying to locate.

SEARCHING REMINDERS

There are three search operators that are specific to the relatively new reminders feature.¹¹ They can be a little confusing, but useful in the right context.

reminderOrder — this value is set when a reminder is added to a note. In most cases, the value will be a really long number that you probably won't remember. The only really useful way to use this operator is with an asterisk:

```
reminderOrder:*
```

That search will yield any note that has a reminder attached to it (whether it's been completed or not).

reminderTime — this operator searches for the date and time of a reminder. Again, this one is really only useful with an asterisk:

```
reminderTime:*
```

As you may have guessed, this search will show you all of your notes with a reminder set that also has a date and time.

reminderDoneTime — the third of our reminder search triplets, this operator shows notes that have been marked as complete. As with the other two, the asterisk is your best bet here:

```
reminderDoneTime:*
```

Yep — this one shows you all of the notes in your account with reminders marked as done.

If you want to know the truth, I've been unable to find official documentation on these search operators. The information provided above is literally everything I've been able to figure out about using these operators and, to be honest, I'm not sure how useful they'll be to most of you. Either way, I promised you a complete overview of all search operators

¹¹ Because reminders are so new, they aren't available on all platforms as I write this. Notably, Evernote for Windows and Blackberry do not currently support reminders.

and leaving these out would be breaking a promise (which my mother insisted I never do).

ADDITIONAL OPERATORS

Since the majority of the remaining operators are, in my opinion, somewhat esoteric and are unlikely to appear in many real-world searches, they get an abbreviated definition and a single usage example. After all, “Brevity is the soul of Internet Documentation” or something.

latitude, longitude, altitude — These will search for notes created at a set of coordinates:

```
latitude:32
```

author — This matches the author’s name:

```
author:”Brett Kelly”
```

source — This matches notes created within a certain application:

```
source:app.ms.word
```

recoType — Search for notes that contain recognition data (like images that contain words and handwritten notes):

```
recoType:handwritten
```

encryption — This matches notes that have an encrypted region in them.

```
encryption: (no parameters for this operator).
```

Ok! That was more than a little terse, I’ll admit. But, we’re not done yet. How about some real-world search examples? Let’s say I wanted to find all of the notes created in the last

two weeks in my Archive notebook dealing with Evernote that contain an image:

```
notebook:Archive created:week-2 resource:image/* evernote
```

Or maybe I'm looking for all of the mp3s I added during 2008 that also have encrypted text within the notes:

```
created:20080101 -created:20090101 resource:audio/mp3 encryption:
```

A quick aside regarding the asterisk as a wildcard character. If you're unfamiliar with this practice, the idea is that you can provide part of a word and use the asterisk to mean "and anything else." One example might be this search term:

```
Everno*
```

This search will yield you any note that contains a word that begins with "Everno" and ends with anything else (excluding spaces): Evernote, Evernotable, Evernotationally — all of these words would match.

A couple of other things regarding the search syntax should be noted. First, you can only use wildcard (*) characters at the end of search terms instead of within and before. According to the documentation, this is because allowing wildcard characters everywhere would put an increased load on the Evernote servers. Here are some examples of what I mean:

- everno* – valid search
- ev*te – invalid search
- *vernote – invalid search

Also, when matching literal terms (words or phrases that aren't attached to an operator, in other words), then any number of spaces will be interpreted as a single space. In other words, this

```
Evernote is [lots of spaces] Great!
```

will match this:

```
Evernote is Great!
```

CONCLUSION

Yeah, it's a lot of information. As you begin to accumulate more and more notes in your account, these search operators will start to become more useful. Don't worry if you don't think you'll ever use these. You may not, to be honest. If you do, definitely come back and reference this chapter.

Onward!

Power-User Tagging Strategies

One of the major complaints I've heard from newer Evernote users is that, while it's insanely easy to add information to your Evernote database, it's somewhat difficult to get it back out. While Evernote features a very powerful built-in search, perhaps you're more comfortable simply selecting a tag or two to narrow your search. Even if you aren't, taking a little extra time to maintain your list of tags can be extremely beneficial down the road, lest you end up with an unmanageable entanglement of tags that does little more than depress you.

We've already talked a little bit about deciding between singular and plural tag names ("books" vs. "book," etc.). It's hard to overstate how much trouble this decision can save you in the long run. So, please, do yourself a favor and pick a convention and follow it mercilessly.

NESTED TAGS

The user-experience folks at Evernote understand that people are going to potentially add a huge amount of data to their databases and, in all likelihood, an equally large number of tags. So, they added this nifty little feature that lets you nest your tags by dragging one or more tags onto another tag so that they become "child tags." This doesn't have any bearing on how the tags are implemented, however — it's merely a way to make your tags easier to interact with visually.

You can probably already see how useful this can be. Instead of having a tag for every single variation on the cumin waffle recipe you've collected and created, you can simply drop them all under a "cumin waffles" parent tag.

CONTROLLING THE SORT

Being a true cumin waffle fanatic whose tags easily number in the hundreds, having to scroll down to the "C" tags every time you want to reference a recipe can be quite annoying. Well, with a little hackery, you can control which of your tags appear at the top of the alphabetically sorted list. If you change "cumin waffles" to "*cumin waffles" (note the asterisk at the front of the tag), it jumps to the top. Nifty, eh?

You can use several symbol characters to control the sort with even more granularity. Below is a table of all of the symbols you can place in front of a tag to have it appear at (or near) the top, in order of precedence:

- ! – Exclamation Point
- # – Hash or Pound Symbol
- \$ – Dollar Sign
- % – Percentage Symbol
- & – Ampersand
- * – Asterisk (or Star)
- @ – 'At' Symbol (will sort after any tags beginning with a number)
- ^ – Caret (will sort after any tags beginning with a number)

In other words, if you prepend a tag with !, it will appear at the very top of the list. Tags beginning with # will appear just below tags with !, and so on.

Tip: Create a tag called "!Frequent" and drag any tags you want easy access to into that tag.

TAG MAINTENANCE

As you create and add new notes in Evernote, you're able to type in whatever tags you like. If you add a tag that doesn't currently exist, it will be added to the top-level tag list

(meaning, it won't belong to any parent tag by default). So, if you're serious about keeping your tags in order, you're going to have to spend a few minutes every so often assigning these new tags to parent tags if appropriate.

Tip: When you change a tag in the tag list (say, from “cumin breakfast pastries” to “cumin waffles”), all instances of that tag in your notes will also be replaced with the new value.

Tags are one of the key elements in a successful Evernote experience. With the proper care and feeding, they can enable you to find any bit of information in even the most vast of Evernote databases in a matter of seconds.

Evernote in Your Pocket

According to a survey I've just made up, everybody and their uncle has a smart phone these days. If you're reading this, chances are you have some type of Internet-capable mini computer in your pocket, purse, or gym bag (assuming you're on a treadmill while you read this, of course).

SMART PHONES

Most smart phones available today come in one of four flavors:

- An iPhone
- An Android handset
- A Blackberry device
- A Windows Phone handset

If your smart phone falls into one of those four categories, you'll be happy to learn that Evernote makes a special mobile application just for your device. I'll wait if you'd like to do a happy dance.

The specific usage of these mobile applications is beyond the scope of this guide because they are updated very frequently and, chances are, any specific instructions or screenshots

I include here will likely be obsolete or incorrect in the near future. Another reason is that, by and large, the mobile applications are fairly simple to use and Evernote does a rather bang-up job of highlighting new and updated features on the [Evernote blog](#).

That being said, highlighting some of the general use cases for the Evernote mobile applications is probably a good idea. Don't you think? Boy, I think so.

COMMON USES

If my years of experience using Evernote on a mobile phone have taught me anything, it's that your Evernote mobile usage will consist primarily of these three things (in order):

1. Adding stuff (photos, quick notes, audio notes, etc.)
2. Referencing existing notes
3. Modifying, arranging, or otherwise organizing your notes and notebooks

Number 1 is the most common way a regular person will use Evernote on his or her smart phone, especially taking photos. The Evernote mobile applications are all optimized in this way: adding things is easy and fast.

Looking things up in your Evernote account is something you'll do sometimes (or more often, depending on what it is you do). For me, it's usually something like referencing a grocery list or finding the occasional account number while I'm at the DMV or something. I certainly don't do it every day (whereas I add things to Evernote using my iPhone quite often: at least a few times per week if not every day).

The Evernote mobile applications are also quite adept at letting you browse the contents of your notebooks or perform searches, but it generally takes a bit longer to do this on a mobile device because—like we talked about in the Notebooks chapter near the beginning of this guide—notes

don't necessarily live on mobile devices in their entirety. So, once you select a note in your mobile app to view, it will take a few seconds or longer to download the contents of the note. It all happens pretty quickly assuming you have a strong connection to the Internet and your smart phone isn't super old, but it can sometimes be a little slow if conditions aren't optimal.

As far as modifying or organizing existing notes, I rarely do this. When I create a note, I'll sometimes make sure I add it to the correct notebook in my account and, if necessary, apply any tags I want. Beyond that, virtually all of the curating I do with my Evernote account happens on my computer.

TABLETS

Just like with the smart phones, you can't swing a dead cat these days without hitting somebody carrying some kind of tablet computer. Heck, I have one (an iPad, if you're curious)!

It will probably shock you to learn that Evernote performs quite well on these in-between devices. Currently, Evernote offers native applications for the following types of tablet computers:

- The iPad
- Tablets running Android (including the Barnes and Noble NOOK and Amazon's Kindle Fire)
- The Playbook by Blackberry

(While the first two have many of the same features, the Playbook application isn't quite as capable as the others. Just so you know.)

Note: I use an iPad. If you use an Android tablet, you can comfortably exchange your tablet's name for "iPad" in the next section and it will all be true.

Most of the time, Evernote on my iPad serves the following functions:

- Note-taking during meetings when I'm actually in the meeting (most of my meetings are done over the phone these days)
- Drafting blog posts and other written bits of content
- Using the Maps application while in the car (and another person is driving, of course)
- Carrying lots of scanned documents to meetings with my favorite tax professional, attorney, etc.

That last one is big. Using Evernote to store scanned copies of all of your paper is a very popular use case (and one that we'll examine much more closely later). Instead of dragging a big folder full of paper, I just grab my iPad when I go see my accountant. And if your accountant is as cool as mine, you might just share a specific notebook with him before heading to the meeting (collaboration will be discussed very soon, too).

How I use Evernote on my iPad isn't what's important, though. The important thing to remember is, if you own a tablet, you can probably install Evernote on it and have access to all of your stuff wherever you go. It's pretty sweet, honestly.

CONCLUSION

How (or if) you use Evernote on your mobile devices will be quite specific to your work, life, and all the rest of it. The only practical advice I can give here is that, even if you rarely use it, it's a great idea to have Evernote installed on your devices just in case you need to access your account while not at a computer.

Evernote & GPS

Speaking of mobile devices, most of the modern ones (smart phones and tablets, specifically) available these days ship with the ability to interact with a Global Positioning System, or GPS. This means that there's a little radio inside your device that, when some software asks for it, can talk to some crazy satellite in space and get your geolocation coordinates, or the latitude and longitude representing where you are.

This all sounds awfully fancy, I know, but Evernote actually does some pretty cool stuff with this GPS business.

Any time you create a new note in Evernote on your mobile device, the software will include your location in the note's metadata. For notes created on your mobile device, this means several things:

- You can look at exactly¹² where a note (or group of notes) was created using your mobile device.
- You can plot your current location relative to a group of notes.

SO, WHAT? WHY IS THIS COOL?

Let's say that you're a big mountain biking person or something (I'm not, but go with me here). Every time you find

¹² Assuming your GPS signal strength was good when initially captured the note, of course.

a super snazzy mountain biking location, while you're there you create a new note in Evernote using your iPhone. Maybe you snap a photo of the dirt (I don't know, give me a break).

Next time you're in the area and you find yourself wondering where that super snazzy mountain biking spot is in relation to where you are, just fire up Evernote. Browse to your collection of mountain biking-related notes (maybe it's a notebook or a saved search) and tell the app to plot those notes on a map. Once you add your current location by tapping the little GPS arrow icon, you'll see that you're just a couple of grassy knolls away from reliving some mountain biker bliss.

Even if mountain biking isn't your thing (ahem), you can probably imagine how this would be crazy useful for you. A few other examples:

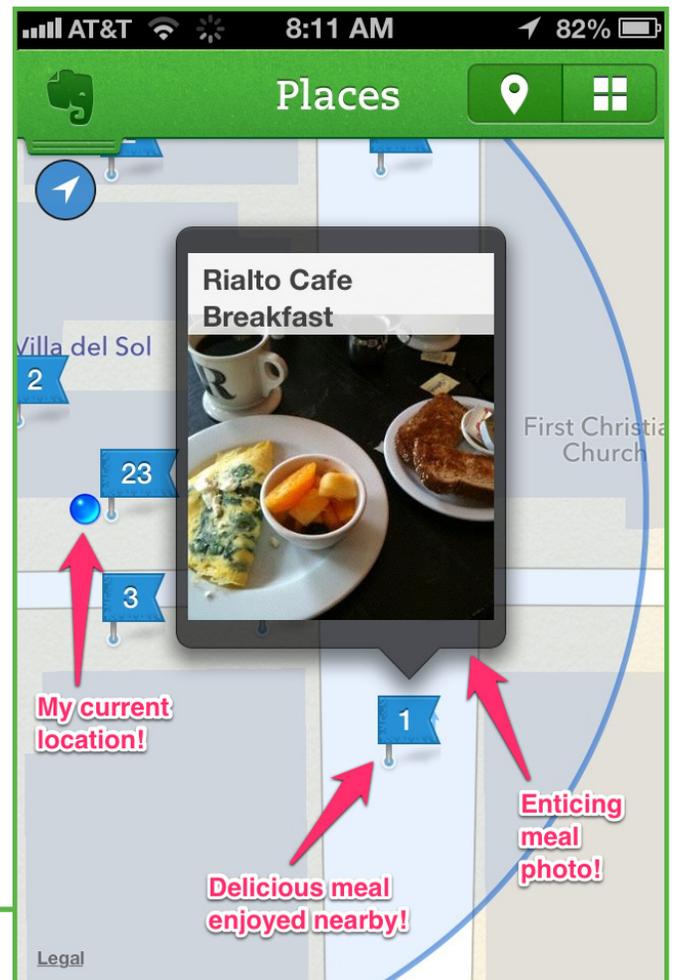
- That awesome sushi joint you found in an out-of-the-way corner of San Francisco
- That one winery where you drank some delicious wine with somebody you think is pretty great
- The location of your car after you leave some theme park in exhaustion and would just like to get on the road, thank you very much

The gist is this: if you want to remember where you've been after you've left, create a note in Evernote while you're there. Simple as that.

Quick example!

As I type these words, I'm sitting in a coffee shop near where I live. Awhile back, I created a note while my family and I were enjoying a scrumptious breakfast not far from my current location. If I view the notes created near where I am now, I can easily find and remember our *muy delicioso* breakfast:

Not bad, right?



CAVEAT GPSOR

(Side note: I just made up a phrase that sounds vaguely Latin. Welcome to self-publishing, folks.)

A few things to keep in mind with regard to this GPS business:

SIGNAL STRENGTH

GPS radio reception can be as spotty as regular cell reception. Latitude and longitude coordinates can be either very specific or quite general, depending on signal strength. If the signal is strong, you'll be able to map your location to an area the size the average living room. If it's quite weak, you'll end up with a location that simply indicates something as large as a city.

In most metropolitan areas with quality cellular coverage, your GPS signal strength will probably be fine most of the time. Just don't rely on it for anything extremely important.

SINGLE NOTES V. GROUPS OF NOTES

At the time of this writing, the mobile Evernote clients are currently unable to show the location of a single note relative to your current location. If you want to see a map of both your location and the location of a single note, your best bet is to issue a search that will result in a small handful of notes (including the one you want to map), then view that set of notes in the map view.

I hope I've been able to bottle up some of the magic that is Evernote and GPS. Having a location attached to your notes (as well as a date and time) helps add context to your memories and, in my experience, makes it more fun to revisit them later.

Other Evernote Apps

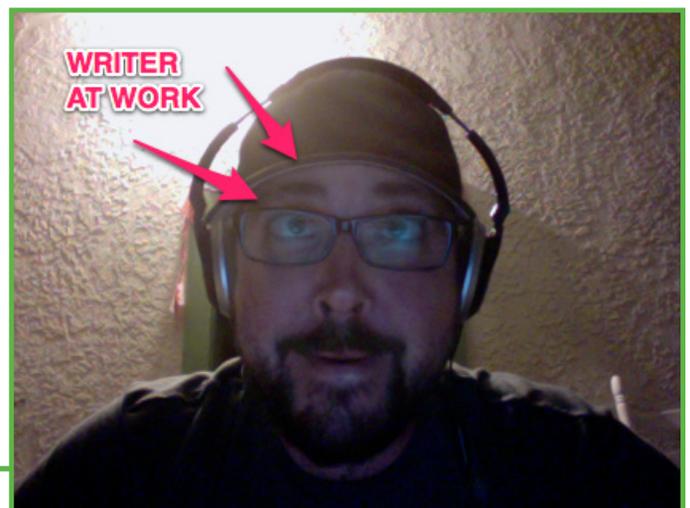
In addition to the regular Evernote applications for your computer, tablet, and smart phone, the company has added a few more apps to its roster in recent months (either by acquiring the parent company or building them in-house). And they're quite good. Let's talk briefly about a few of them.

Note: *this list is **not** exhaustive. For a complete list of Evernote's apps, visit Evernote's web site.*

SKITCH

A notable acquisition by Evernote occurring in mid-2011 was Skitch, makers of a handy screen capture and annotation utility for Mac OS X. The day the acquisition was announced, Evernote also unveiled Skitch for Android (which works on both tablets and smart phones). Since then, Evernote has produced Skitch for iPhone, iPad, Windows desktop and Windows Phone.

Essentially, Skitch lets you quickly annotate a photo or screenshot as well as simply draw on a blank canvas. Using a simple set of tools, you can easily highlight part of an image with arrows, shapes, free-form lines, or text. For example, I just took this photo using the built-in camera on my MacBook Pro and quickly made it pretty using Skitch:



And, as you may have guessed, Skitch lets you quickly save your annotated images to your Evernote account. I've used this tool for years on my Macs (long before I used Evernote, truth be told) and I swear by it. In fact, Skitch was used extensively in the creation of the various screenshots that appear in this guide. [Learn more about Skitch here.](#)

PENULTIMATE

Not altogether dissimilar from Skitch is [Penultimate](#), a drawing app for the iPad. Evernote acquired this company in mid-2012. The app focuses more on writing and simple sketching than Skitch does, so it can be quite useful for hand-writing notes during meetings or drawing simple diagrams. It offers a few different paper-like background options for sketches including lined, grid, and blank. You can purchase other specialty paper sets using Apple's in-app purchase mechanism. Personally, I'm a big fan of the Photo Sheet paper style, which works nicely if you embed a photo in your sketch. Here's a sample from my own personal archive:

If this app sounds like your cup of tea, you can get more information on [Evernote's web site](#). Oh, and for you hand-writing folk, I highly recommend getting a good stylus for use with this app. My personal favorite is the [Cosmonaut by Studio Neat](#), which works with all modern touch-screen tablets and handsets.



EVERNOTE HELLO

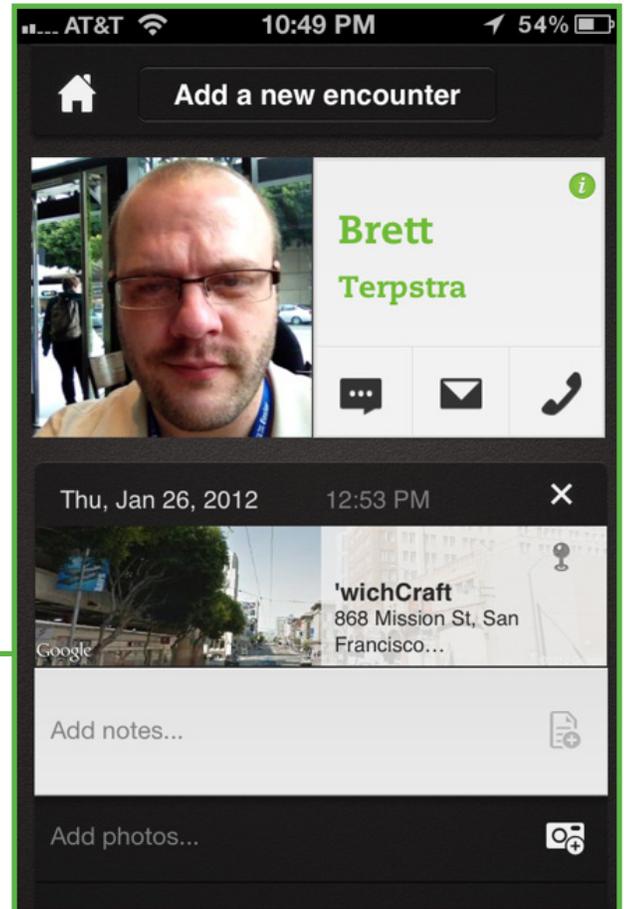
Evernote Hello is a specialized Evernote application for iPhone and Android phones that deals specifically with remembering people and encounters with people. When I go to a conference or other networking-heavy event, Evernote Hello is how I keep track of who I met and where I met them. Here's how it works:

You meet somebody new (or have never met in person before). Fire up Evernote Hello and tap the huge plus button. Then you can either hand her your device or input her information yourself. When you're done, you'll have a record of having met that person along with the location where you met. If you meet her again some time later, you can open her entry in Evernote Hello and choose to add an encounter. Evernote Hello will remember when and where each encounter took place.

You can also add notes and contact information for each person you meet and sync this information with your device's Address Book or Contacts application. I make pretty heavy use of this application, personally. Here's a real-world example of what an Evernote Hello entry looks like (I met this fetching young man, a long-time Internet pal, at Macworld in San Francisco in early 2012):

Incidentally, this application was one of the first Evernote client applications to use read-only notes. This means that notes created in Evernote Hello cannot be modified in any other application besides Hello. The only exceptions are that you can tag these notes, move them to different notebooks or delete them entirely, if you like.

Get more information about Evernote Hello on [Evernote's web site](#).



EVERNOTE FOOD

Finally, we come to Evernote Food. If Evernote Hello is for people, then Evernote Food is for... you guessed it... food. It lets you capture meals (and other details related to meals) using photos and that geolocation business we talked about before. Evernote Food is available for iOS and Android.

Create a new meal by tapping the plus button, then start snapping photos. You can include a caption for each photo if you like. If you're eating out, make sure to select a "Place" from the pre-populated list of nearby restaurants (or food-related businesses), or add your own location if Evernote

Food doesn't find it.

This app's data comes with the same read-only business we talked about in the section on Evernote Hello. Just so you know.

Here's a little insider tip: I use Evernote Food for capturing all sorts of things that have nothing to do with food. Birthday parties, family trips to the beach, you name it. Reasons why I do this:

- I can easily attach the name of a place to the note (instead of just the geolocation coordinates, which don't really mean anything without a map).
- I can share a nicely-formatted, miniature photo album with friends and family.

If the regular Evernote app feels a little too free-form for your taste, try Evernote Food for an easy way to add stuff to Evernote.

In addition to making specialized apps like the ones described above, Evernote provides an Application Programming Interface (API) that developers can use to integrate their applications and services with Evernote. The result is oodles and oodles of third-party applications that integrate with Evernote. Check out the [Evernote Trunk](#) for a massive list of products and services that work with Evernote.

Sharing is Caring

In terms of zoo animals, Evernote isn't the monkey that frolics about with the other monkeys, sharing its banana bunch and following his fellow monkeys on Twitter. Evernote is more like the hippopotamus that sits in its specific area, alone and happily chewing on whichever smaller zoo animal is lunch. Evernote the hippopotamus doesn't dislike the other animals — quite the opposite — but it doesn't have much reason to get all cuddly with everybody. Fact is, a given person's Evernote database is largely her personal silo — all the stuff she collects is, for the most part, important to her and kept for her own benefit. There is, however, one notable exception to Evernote's antisocial behavior: note and notebook sharing.

NOTEBOOK SHARING

Notebook Sharing in Evernote first became available in June of 2009. Free users could share their notebooks with other people, but those other people would be unable to modify the notes or add notes to the notebooks. To modify the contents of a shared notebook, the owner of the notebook needed to be a premium user. This was all fine and the world continued to turn.

Trouble is, the sharing feature lived exclusively in the Evernote web client (the one you could access by visiting <http://evernote.com/>). Personally, the only time I ever use the web client is when I'm at a computer that isn't mine. Based

on my limited knowledge of how the average person uses Evernote, I'm sure I'm not the only one who makes little use of the web client. Because of that, Notebook Sharing was a non-starter for me, despite the potentially endless amount you could do with it in all sorts of contexts. Thankfully, that's all over because in-app sharing is here. We'll get into the plumbing of this in a second, but first let's talk about why it's such a cool feature.

Most office-professional types know there are all sorts of clumsy ways to collaborate on a document with a coworker or team. Whether you're emailing different revisions of the document back and forth or accessing the same document on a shared network drive or something, there are inelegant ways to do it that often lead to conflicts, missing or outdated data, or any number of other headache-inducing hiccups. On the flip side, there are an equally large number of collaboration solutions that have thought of everything and go out of their way to ensure that, through cumbersome check in/out procedures and such, it's virtually impossible to clobber the last version of a document with the one you just edited. Notebook sharing lives sort of in the middle: it's a low-friction way to share information with one or more people on your team. You can decide who gets to edit the information (and who doesn't), and all of the information lives in Evernote, so all of the synchronization stuff is handled for you and changes are automatically added to everybody's notebook.

Notebook sharing isn't just for the suits, mind you. Privately share photos of a birthday party with some close friends. Create a notebook where everybody shares their favorite memory of Grandma that you can turn into a book for her 75th birthday. If a few people need to casually access the same set of information, you could do a lot worse than a shared Evernote notebook.

Alright, so here's how the sausage is made, as it were.

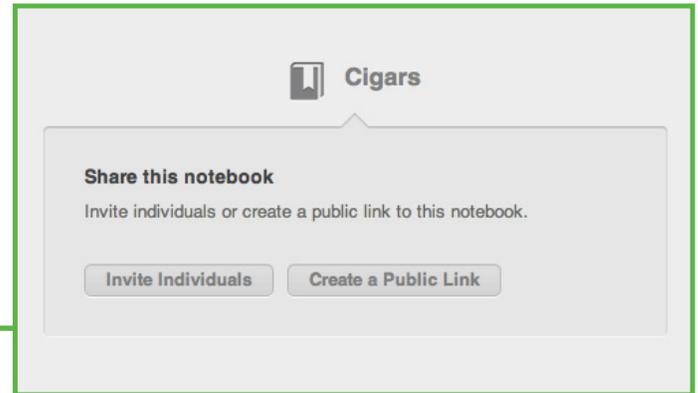
SHARING A NOTEBOOK WITH ONE PERSON (OR A FEW PEOPLE)

To share a notebook with somebody, right-click on the notebook name in your list of notebooks at the left-hand

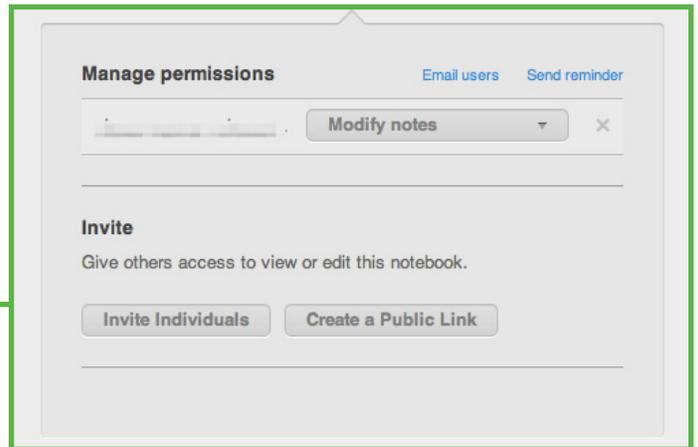
side of your main Evernote window and choose the Sharing option.

(Note: The screenshots in this chapter are taken on a Mac, but the Windows versions of these screens are essentially identical.)

You'll now be looking at the Shared Notebook Settings screen, which will look something like this:

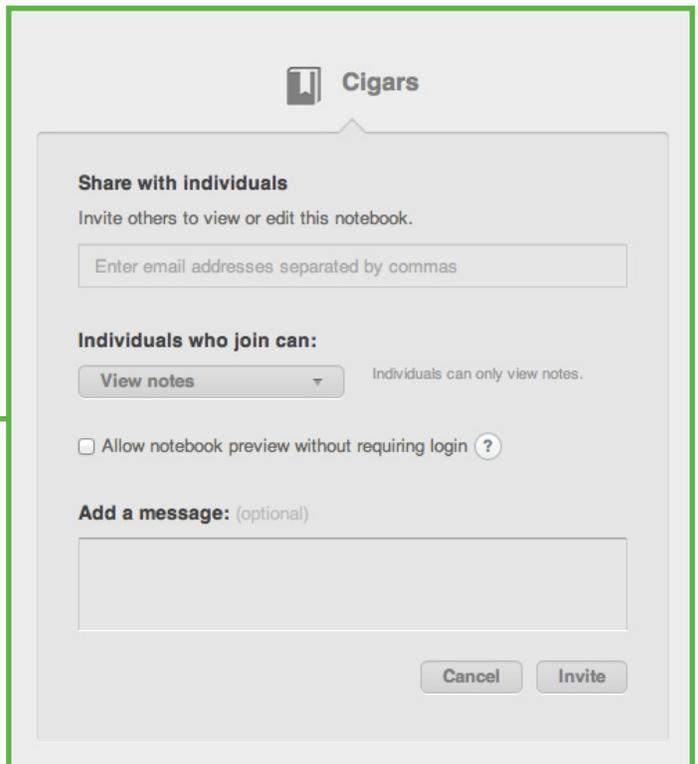


Since we want to share a notebook with one person in this example, click Invite Individuals, which will expose this form:



Clearly, this form will let you share with more than one person, so feel free to fill in as many email addresses in that first box as you like. If you're a Premium user and want the person with whom you're sharing the notebook to be able to modify the notebook or invite other users, choose that option from the dropdown. If not, just leave "View Notes" selected (which is the default). If you would prefer the people with whom you're sharing to authenticate with Evernote before viewing your shared notebook, check the box that requires this (recommended). Once you click Invite, an email will be sent to each email address you've added, so if you want to include a special friendly message explaining what all this business is about, you can do that in the "Message" field.

Once you've got all of these fields filled in to your liking, you're ready to pull the trigger — click "Invite." After a few seconds, you'll see something that looks and smells a great deal like this:



Here are all of the people with whom you're sharing this notebook. If you want to stop sharing the notebook with this person, just click the cute little "x" next to that person's name and email address. If you want to change his access level, just use the dropdown menu next to his name.

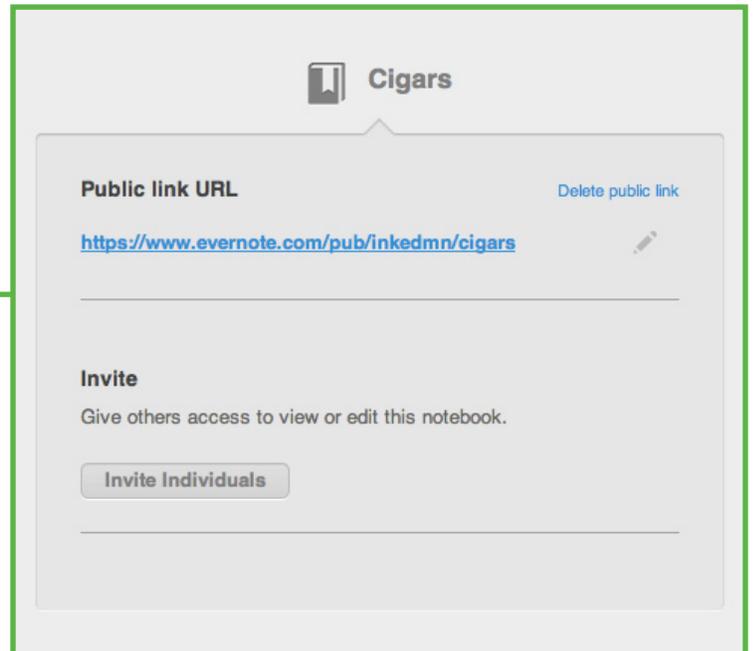
Additionally, you can send an email to everybody with whom the notebook is shared by clicking “Email Users” or remind them you and your notebook still exist by clicking “Send Reminder.”

SHARING A NOTEBOOK WITH ALL OF HUMANITY

If you happen to discover the formula for a clean-burning, renewable fuel and you want share it with the entire planet, Evernote can make it happen for you. Right-click on the notebook containing the fuel thing and, as in the previous example, click “Share Notebook.” When the “Shared Notebook Settings” screen appears, click “Create Public Link”:

This is quite a bit simpler than the first form we saw because the only mode supported by this type of sharing is “View only.” In other words, enabling this type of sharing will let everybody see the contents of this notebook, but not edit it (unless you’ve shared it specifically with somebody, in which case he or she will be able to edit it). Now, you just need to give that public link to anybody (and everybody) who you want to see the notebook. They’ll be able to view it on the web using the public URL or “link” it to their account; this means that it will appear alongside the other notebooks in their account when viewed using one of the Evernote client apps.

If you ever want to stop sharing this notebook, just click the “Delete public link” link and the sharing will—you guessed it—stop.



WHEN SOMEBODY SHARES A NOTEBOOK WITH YOU

Now that we’ve talked at length about how to share notebooks with everybody, you might be wondering, “what happens if

somebody shares a notebook with me, Mr. Fancy Pants?”

At the top of the notebook list on the left hand side, you'll see “Shared.” Clicking that will give you the “Manage Sharing” option, which lets you change which of your notebooks are shared and how, and below that will (maybe) be a list of notebooks. These notebooks can be of one of two varieties: public notebooks that you've linked to your account or notebooks that have been shared with you by another user. If it's a public notebook, the contents will be read-only. If it was shared with you by another user, you may or may not have the ability to edit the contents of the notebook (depending upon how the user shared the notebook with you). If you right-click on a notebook in this list and choose “Notebook Settings,” you'll see the details regarding this notebook's sharing and what you can do with it.

Another sure-fire way to tell if you have the ability to modify a notebook is to try to modify it. If it's been shared with you in “View only” mode, clicking inside the body of the note will produce the same effect as screaming at a bag of potting soil: absolutely nothing. If you are able to get a cursor to appear within an existing note (or create a new note), then you can hold your head high because you've been given Modify access to this notebook. No, really, congratulations.

Alright, enough about this notebook malarky. Sharing individual notes is where Evernote gets really social, so let's talk about that for a minute.

SHARING INDIVIDUAL NOTES

Note sharing can happen using one of several means, all of which are quite straightforward:

- Email
- Shared note link (viewable in a web browser)
- Social Networks (Twitter, Facebook, LinkedIn)

If you share a note with somebody via email, Evernote will create a mail message containing the entire note and send it to whomever you choose. This can be done using virtually all of the Evernote client applications (including Evernote.com), but there are a couple of things to keep in mind:

1. Some email providers place a limit on the size of messages they will accept and deliver. If you've got a note with a 30mb audio file in it and you try to email it to your brother-in-law, there's a chance the message will be rejected for being too large.
2. In order to protect their users from nefarious characters, these same email providers will often disallow emails that contain certain types of attachments. For example, if you email a note that contains a .exe file (a Windows executable file), you can bet that many email providers will reject this message.

The good news is that you can still share the note using the Shared Note URL (discussed below) in case the sharing via email doesn't pan out.

Since sharing with email is common to most of the Evernote applications (desktop and mobile), describing exactly how to do it would take quite a bit more time than you or I would like. In your Evernote app of choice, find the Sharing options (an arrow icon is what I'd look for) and choose Email. If you have any trouble locating this, let me know and I'll figure it out for you.

SHARING VIA SHARED NOTE URL

Just like it says on the tin, this feature will take any note in your account and generate a unique URL for it that's suitable for sharing just about anywhere (email messages, web pages, social networks, etc.). This is probably my favorite means of sharing because I can quickly bang out a note explaining something, add a few images, and share it with a couple of clicks.

Keep in mind: when you share a single note, it's now public. If somebody knows the URL of the note you shared, they'll be able to see it (as opposed to shared notebooks, which can be limited to individual people). The URLs for shared notes aren't easy to guess or anything, but there's nothing stopping folks from sharing it with 500 of their closest Facebook pals if they have the URL.

Thankfully, though, shared notes can be un-shared. This action will vary based on the device or computer you're using, but the "share" and "stop sharing" functions will almost always be in the same menu within whatever app you're using.

CONCLUSION

There's an overview of sharing your Evernote stuff. It's not hard to wrap your head around and can really enhance your Evernote experience. Plus, I'm always telling my kids that they should share, so I figured I owed you the same courtesy.

Evernote Reminders

In May of 2013, Evernote introduced a new feature called Reminders to some¹³ of its applications (Mac, iOS, Android, Windows Phone and Evernote Web). This is a feature people have wanted for roughly forever and I thought it might be worth covering here. You know, for the children.

Let's talk about what reminders *are*, their basic use and some interesting ways to employ them. Cool? Cool.

In a nutshell, reminders let you “flag” a note. When you set a reminder on a note, a couple of things will happen:

- You'll be given the option to choose a date and time to be notified about that note (more on this in a second)
- The note will appear in a special area at the top of any list of notes where it appears (contents of a notebook, search results, etc.)

When you no longer want to be reminded of that note, you can mark the note as “done” or clear the reminder.

USING REMINDERS

When you're viewing a single note, look for the little alarm clock icon (it's probably near the top of the note). Click or tap

¹³ As I write this, Windows and Blackberry do not support reminders. This may very well have changed by the time you read this. Consult the Evernote web site for the latest and greatest information.

that guy once to set a reminder on that note and you'll get a little popover asking you if you want to add a date and time for notification. When, for whatever reason, you no longer want to be reminded about this note, click or tap the alarm clock again. You'll be given three options:

- Mark as Done
- Clear Reminder
- Add (or Change) a Date

The first two options might seem like they do the same thing, but there's a subtle difference: clearing a reminder removes any record that the reminder was ever set while marking a reminder as done will cause Evernote to remember both when the reminder was set and when you marked it as complete. Personally, I recommend marking a reminder as done instead of clearing it altogether since, using the `reminderDoneTime` search operator, I can search for notes with a reminder set that has also been marked as done. Clearing the reminder altogether doesn't allow for this.

Just like it says on the tin, adding a date and time to a reminder will let Evernote know you'd like to be notified about that note on the given date at the given time.

Speaking of notifications...

REMINDER NOTIFICATIONS

Evernote can notify you of a reminder-enabled note in two ways:

1. A notification is sent to your computer or mobile device
2. An optional email digest sent at the beginning of the day (this will contain links to each note with a reminder set for the current day).

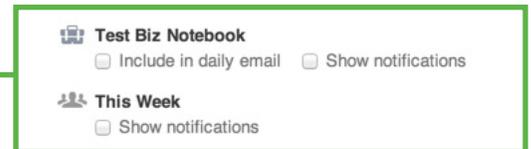
This warrants some further discussion.

If you're using Evernote in complete isolation—meaning, you're not using Evernote Business or shared notebooks—then you'll only be notified about notes in your account. But what if you're a great big Evernote nerd whose cumin waffle club makes *extensive* use of shared notebooks *and* your employer uses Evernote Business? It gets a smidge hairy; but don't worry—we'll get through it, I promise.

The easiest thing to do is head over to Evernote Web, log in, and visit the Reminders section under Settings. Here, you'll see a few configuration options:

- **Timezone** — four out of five dentists recommend you set this to your usual timezone. Digest emails are sent at the beginning of the day, around 8:00 AM in my experience, and your timezone is used to determine when the digest email should be sent.
- **Email reminders** — this checkbox controls whether you receive reminder digest emails. No check mark, no digest emails.

Finally, you'll have a list—possibly a big list—of notebooks, each with its own set of configuration options. This list will contain notebooks you use that are shared with you by other people, as well as Evernote Business notebooks:



For Evernote Business notebooks (indicated by the little briefcase icon), you can enable or disable notifications as well as digest emails. If you have the “Email reminders” option enabled, reminders set in shared notebooks will always be included in the digest email. Check the relevant boxes for any notebooks you want to keep tabs on.

In case you're wondering: you won't receive a notification email for reminders that don't have a date and time associated with them. Also, if no reminders are set for a given day, you won't receive a digest email that day.

REMINDER USE CASES

Here are a couple of nice use cases for reminders that I've come up with in the relatively brief time they've been available:

NOTEBOOK TABLES OF CONTENTS

First and foremost, setting a reminder on a note causes that note to appear at the top of any note list that contains the note. This could be the contents of a given notebook, the “All Notes” view, the results of a search—anything. This can be especially useful if you want to create a table of contents for a notebook. Here's how to do it on the Mac:¹⁴

3. Select the notebook for which you'd like to create the table of contents.
4. Select all of the notes in the notebook using $\text{⌘}+A$ or “Select All” from the Edit menu.
5. Choose “Copy Note Links” from the Note menu.
6. Create a new note in the same notebook and call it whatever you like. This will be your table of contents, so name it appropriately.
7. Click into the body of the new note and paste.
8. Set a reminder on the note (with no date and time).
9. Have a waffle because that's all there is to it.

Once you're finished, you'll have a note at the top of the note list that contains links to all of the notes in that notebook. Spiffy!

(Bear in mind that your table of contents won't be automatically updated when you add new notes to the notebook—you'll have to manually update the table of contents with links to any new notes.)

¹⁴ This can't be done on a mobile device or on the web and, as previously mentioned, reminders aren't yet supported on Windows.

TIME-SENSITIVE INFORMATION

I don't personally use Evernote to manage tasks, but I've found reminders to be useful for having specific information available to me at very specific times. A few examples:

About a month ago, I heard from a friend that a band I like is going to be playing in my neighborhood later this year and that tickets would go on sale the following week. I clipped the web page containing ticket information into Evernote and set a reminder to go off 10 minutes before the tickets would go on sale. This way, I would have time to get to a computer and have my credit card ready right when the tickets became available.

In case I didn't make it obvious in the travel chapter, I'm something of a headcase when it comes to traveling, if you want to know the truth. The airline I typically fly lets folks check in 24 hours before their scheduled departure and some synaptic defect in my brain makes doing this an absolute necessity. So, I create a note in Evernote with the flight information and confirmation number and set the reminder for 24 hours + 10 minutes before the flight so I can check in exactly on time.

As previously mentioned, the common thread here is that there are times when I want to have a specific bit of information shoved in front of my face precisely when I need to do something about it. Of course, how I use reminders isn't the best or only way to use them; the feature probably has oodles of other applications that I simply haven't thought of.

CONCLUSION

Reminders are one of those features that appears simple and straightforward (and it is, really), but with a little creativity, it can pack quite a wallop.

A Smorgasbord of Evernote Tricks & Tactics

What follows is a random smattering of possible use cases for Evernote. I use most of these (or some slight derivation) myself and I thought you might appreciate a little something extra. A good way to think of this would be as the prize in the box of breakfast cereal. Or not.

EVENT-SPECIFIC NOTEBOOKS

Because Evernote supports many different types of media, it's a pretty great way to capture the many facets of an event or celebration. Birthday parties are a great example. Using your Evernote-capable smart phone, snap tons of photos of the event and make an audio note containing the day's rendition of "Happy Birthday" (or whichever refrain is typically sung at a birthday party in your land of origin). Each of these notes will have the date and time when the note was created and, if supported, the GPS coordinates where the note was created. If it's a birthday party for your young child, Evernote is also useful for keeping track of gifts given and by whom for the purposes of sending thank-you notes and whatnot. Bridal and baby showers would be a natural off-shoot of this idea.

Trade shows and conferences would also be a good fit. After spending the day listening to speakers (taking notes in Evernote), visiting vendor booths (snapping photos of products), and other such activities, you'd end up with a serviceable record of the day's activities. Bonus points for

keeping photos of receipts for when you need to file the trip's expense report upon returning to the office.

If you choose to put this into somewhat extensive practice, you might get to the point where you realize that you're now sitting on a sizable list of event notebooks. With the advent of notebook stacks, you can quickly shuffle these into their own stack and keep them effectively hidden until you want or need to peruse them.

MEETING NOTES

If you have a job, you probably attend meetings. Heck, even if you don't have a job, you probably find yourself in a meeting-like context every now and again. Evernote is a fantastic place to both take and store meeting notes. As I mentioned in the chapter on phones and tablets, you won't find me in a meeting without my iPad open on the table in front of me.

“But, what if I don't have a tablet computer, smart guy?”

No problem. Jot down your meeting notes on paper (or your bare forearm or whatever you prefer to write on — I don't know). When you get back to your desk, you can either transfer them to Evernote by typing them or—and this is some seriously Star Trek stuff—take a photo of the notes and put that into Evernote. Once that note is run through Evernote's OCR system, the handwritten text will be searchable (unless your handwriting is so bad even you can't read it — I may or may not have this problem).

“STUFF I WANT”

I'll be honest — my wife and I have got this “act like a grown-up” charade pretty much nailed. One of the things adults do (we're told) to avoid impulsive buying is to add the thing you want to a list and let it sit there for a period of time, maybe a couple of weeks or a month. Once that time has expired,

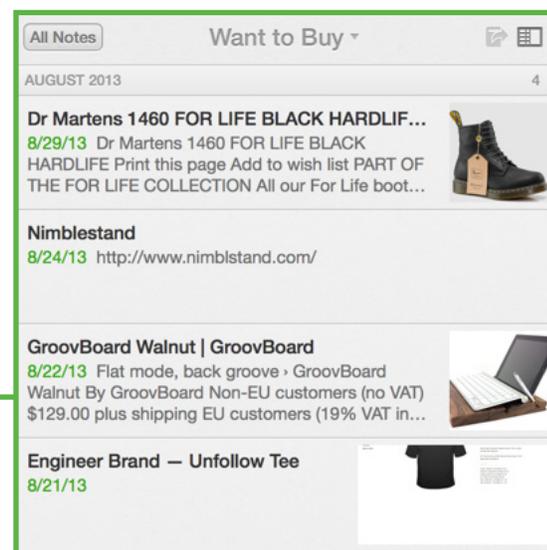
you revisit the list and see if you still want that Brazilian foot cream as badly as you did when you first saw it.

See if you can guess which software application we use to track these “Stuff I Want” items. No, really. Go ahead and take a stab at it.

It’s totally Evernote.

We have a shared notebook called “Want to Buy” where we drop photos, web clips, or just short bits of text describing the item we simply must have. Every so often, we revisit our list and discover that maybe we didn’t want that fireplace lighter shaped like a moose as much as we thought we did.

This works particularly well because it’s *super* simple to add things, especially stuff we find on the web. Go ahead and give it a try.



EVIDENCE LOCKER

Once upon a time, a friend that isn’t me was having a bit of trouble with a project at work. Without getting into the gory details, my friend who isn’t me felt that some of his coworkers weren’t remembering certain statements they’d made and it was looking like my friend who isn’t me was going to catch some flak for missing a deadline that he hadn’t committed to meeting.

Let me tell you, this happened to my friend who isn’t me *precisely* one time before he started archiving conversations, deadlines and agreements in Evernote. He even created a special tag for these notes (I’m told). Specific emails, instant messenger conversations and even meeting notes describing when certain things were said — it all went into the evidence locker.

My friend who isn’t me didn’t need to produce most of the evidence he had accumulated, but he slept way better at night knowing that he had the truth on his side.

NOTE LINKS

This feature allows you to create a clickable link to an individual note in your account. You can paste these links anywhere, not just in Evernote (though, they work quite well there, too). Check out [this blog post](#) for an overview of how to use Note Links. Personally, I use them rather extensively in conjunction with my [task management app of choice](#). For example, if I need to call my auto insurance carrier about something, I'll grab the note link to my policy and drop it into the "notes" section of the task. Then, when I'm on the phone, I can click (or tap) the link and be taken directly to the note I need. Oh, and note links work on mobile devices, too.

RUNNING LISTS

No, not that kind of running.

I'm only slightly¹⁵ embarrassed to admit to you that, in the past few months, I've started reading comic books for the first time. Why are you laughing?

Anyway, I'm regularly recommended comics to read, both by friends and on blogs and podcasts. It probably won't surprise you to learn that I have a note in my Evernote account called "Comics to buy" that I routinely add to.

Similar notes for books, movies, and bands are also present and routinely updated. I'm rarely stuck wondering what to read, watch, or listen thanks to my "running lists."

Hardly rocket science, I know, but this has quickly become one of my favorite Evernote uses. Related: if you use an iPhone or iPad, there's an application called [Drafts](#) that can quickly append to existing Evernote notes without leaving the app. It's like magic and you should look into it.

¹⁵ Ok, fine very embarrassed. I'm 35 years old, for heaven's sake.

CONCLUSION

Evernote is one of those apps with *loads* of potential uses, and these are just a few of my favorites. Hopefully, they provided a little bit of inspiration for your own adoption of Evernote.

A Brief Look of Evernote Business

Evernote Business is, well, Evernote. But for businesses.

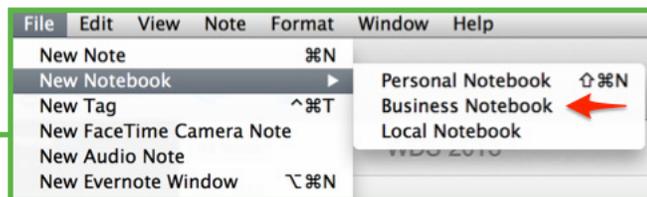
“You’re really funny, you know that? Just hilarious.”

At its core, Evernote Business is the same Evernote you know and love, but optimized for use in a business context. This means that things like sharing are easy and the potential issues surrounding using Evernote on your work computer¹⁶ aren’t really issues anymore.

The good news is that if you know how to use Evernote, you pretty much already know how to use Evernote Business. It’s more of an abstract concept than it is a new interface to Evernote. Let’s discuss a few of the core concepts behind Evernote Business...

BUSINESS NOTEBOOKS

When your account belongs to a Business,¹⁷ the creation of a notebook now offers a third option (beside local and synchronized notebooks): Business Notebooks.



¹⁶ Some companies tend to frown on their employees’ installing software like Evernote because of the relative ease with which company data can leave the bounds of the corporate environment. Evernote Business erases this concern since it’s *intended* for use at the office and the company retains ownership of data added to Business notebooks.

¹⁷ For your account to be added to a Business, an administrator of the Business must invite you. How this works, along with a whole lot more info about Business, can be found on the Evernote Business Resource Page.

The difference between a Business Notebook and the other two types is simple: Business notebooks—and the data they contain—belong to the business, not the user.

For example, if your name happens to be Bob (Hi Bob!) and you work for Esmeralda's Driveway Paving Service, any data you create or save in the Evernote Business account held by Esmeralda now belong to Esmeralda's company. Practically, this means a few things:

1. You can't completely remove data from an Evernote Business notebook (unless you're one of the administrators on the Evernote Business account). You can throw a note into the Business's Trash, but only a Business admin user can empty the Trash and the admin can easily restore the trashed note or notebook.
2. If you leave your job and your account is removed, your data will live on as part of the (Evernote) Business.

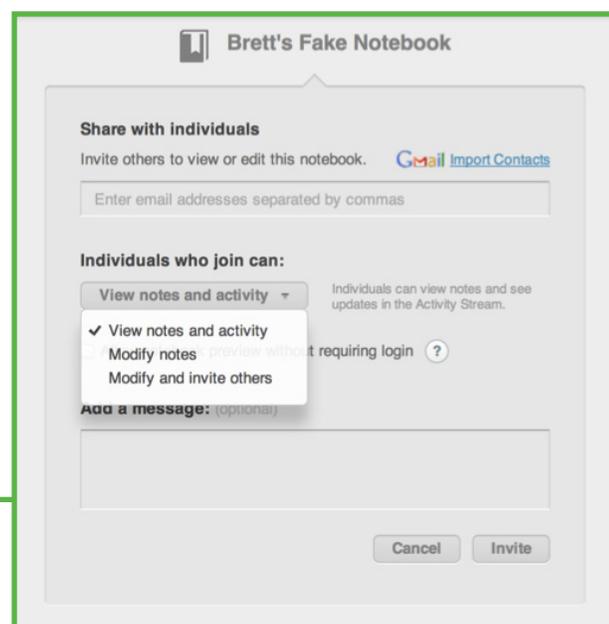
SHARING BUSINESS NOTEBOOKS

By default, Business Notebooks are *not* shared with anybody. The notebook and the data it contains belong to the business, but the notebook will only be visible to you until one (or both) of two things happens:

1. The notebook is shared with another user (or users) by name.
2. The notebook is published to the Business Library.

In the first case, the experience is essentially the same as sharing a personal notebook. Provide the email address of the person (or people) with whom you'd like to share the notebook and decide which permission level they should have:

Enter an optional message to the recipient if you want to, and send the invitation. Easy peasy, lemon squeezy.

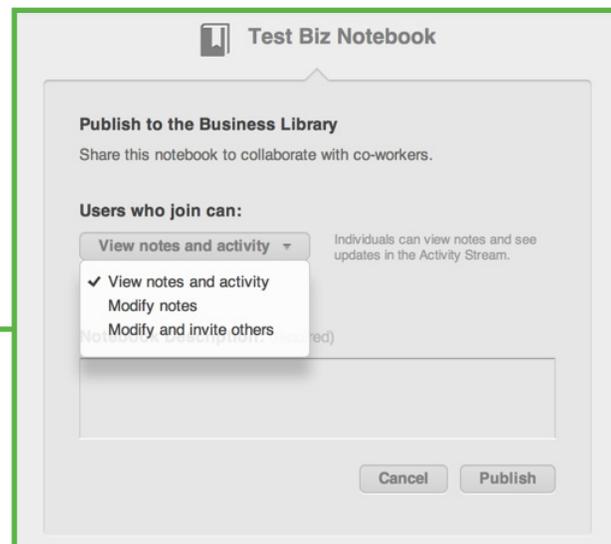


Publishing to the Business Library is like a mixture of sharing a personal notebook with the world (as described in the chapter on sharing) and sharing with individual users. When you publish a notebook to the Business Library, your notebook will be visible to everybody who is part of the business; that doesn't mean, however, that everybody can just do whatever they want in the notebook. No, sir — you have the same permissions options as when sharing a notebook with an individual:

So, what's this "Business Library" thing, you ask? It's pretty straightforward, actually; think of it as a directory of notebooks that employees of the business have seen fit to make available to everybody in the organization. Click the Business Library icon and you'll be presented with a lovely grid of notebooks. At Evernote (the company), our library has many dozens of notebooks covering a variety of topics:

- Employee policies and procedures
- Design ideas and collaborations
- Marketing assets and promotional materials
- Technical details of varying types

Think of it as one part knowledge base, one part collaborative workspace, and one part whatever you want it to be. In my own work, I produce a good amount of written content for the [Evernote Developer site](#) and almost all of it makes a stop in an Evernote Business notebook for review and editing by other members of my team before it makes its way onto the live site. This is particularly handy since I don't work at the office with all of my coworkers—I work from my home—and having the means to work asynchronously is important.



CONCLUSION

Evernote Business is fairly easy to understand once you're comfortable using Evernote. If you're interested in using Evernote in your business, I'd highly recommend checking it out since, as previously mentioned, I've become quite a fan in the few short months it's been available.

Importing & Exporting Evernote Data

While data import and export might be a skosh nerdier than most of you might be up for, I think it's a good idea to cover it just in case.

Evernote for Windows and Mac allows you to export your notes in one of two formats:

HTML — this format is suitable for viewing outside of the Evernote application and *can't be re-imported later*. Another possible use of this format would be if you build one or more notes and you'd like to share them on your website or with another person who isn't an Evernote user (yet).

ENEX — this format, by contrast, is XML and contains all of the data within your note(s) including *most* of the metadata. This is the format we'll be discussing in more detail in a second because of its flexibility (and mystery).

First, though, let's talk a bit about how to export your data and what the potential benefits are.

HOW TO EXPORT NOTES

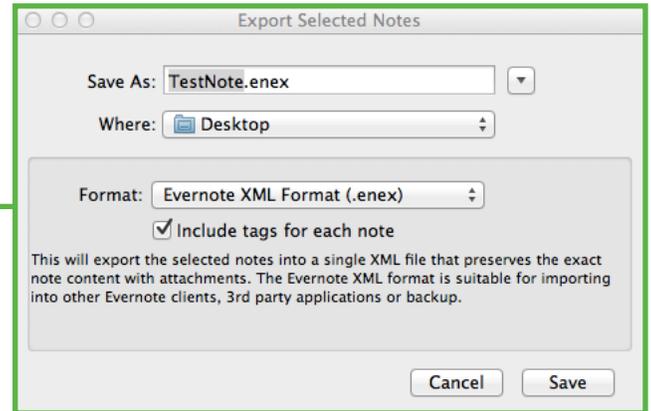
You can export all or part of your collection of notes quite easily. If you want to export an entire notebook, simply right-click the notebook and choose the "Export..." option. If you want to export a small handful of notes, make sure they're all selected, then right-click them and choose, you guessed

it, “Export...” Want to export every single note in your account? Easy peasy: right-click “All Notebooks” and choose “Export...”

Performing any of the above actions will cause Evernote to prompt you for the name of the export file and the format, as well as provide you with a checkbox that allows you to include any tags applied to the notes at the time you export. The dialog box looks a lot like this:

(You’ll almost certainly want to choose ENEX as the format.)

If you choose ENEX, it will produce a single file containing all of the notes you chose to export. If you chose HTML, you’ll get a big honking directory full of HTML files and associated images and other files (assuming your notes contain any images or files, that is).



WHY EXPORT?

By and large, the most compelling reason to export your data from Evernote is to create a backup or archive of your notes. Since all of your data also exists on Evernote’s servers (unless you use Local notebooks), this may seem a bit counterintuitive and, honestly, it’s not something most people are going to do with any regularity. But, if you decide that you will sleep better knowing that you’ve got a backup copy of your notes living on a computer that you personally control, then export to your heart’s content.

CAVEAT EXPORTOR

(These made-up Latin phrases are starting to annoy even me.)

There are a few things you need to keep in mind when exporting your notes in the ENEX format.

- Notebooks are not included as part of your export. If you want to make a local archive so you can re-assemble your data (say, in a different Evernote account), you should export your notebooks one at a time and name the ENEX file the name of the notebook for when you re-import the data.
- When you export one or more notes, the only metadata that are not included are the created and modified dates. This is important; it means that, if you import a collection of exported notes, each note's created date will be whatever date and time was set on your computer at the time of the import. In other words, as far as Evernote is concerned, every note you import will be a brand new note created when you import it. This may not seem like a big deal. Personally, I rely heavily on knowing *when* a note was created since it gives me additional context regarding the note's data. All this is to say that you should remember this limitation before you getting all crazy with the exporting, mkay? Mokay.
- As I mentioned a second ago, Evernote gives you the option to include any tags associated with the set of notes you're exporting. There's no right or wrong answer here: if you want your tags to come with you when you re-import your notes, then definitely select this option. If you're looking for something like a fresh start with tags, then leave that option deselected when you export.

OK, SO IMPORTING THEN?

We've talked a lot about exporting notes thus far, so what's the deal with importing? Glad you asked.

Importing is easy, assuming the following two things:

- You know where on your computer the ENEX file lives.
- You have a computer with Evernote installed. This one's probably a safe bet.

In Evernote on your PC or Mac, look under the File menu for the “Import” option. When you click this bad boy, you’ll be asked for the location of the ENEX file you want to import. Once you select it, Evernote will create a new notebook and fill it with the contents of your ENEX file. From here, you can either rename the notebook if you want it to be a permanent part of your Evernote account or you can drag the notes into other notebooks that already exist; it’s up to you how to proceed from here.

CONCLUSION

As I mentioned earlier, this whole import-export dance isn’t, in all likelihood, going to be something you use to any great extent. But, that doesn’t mean some folks won’t find it handy.

How I Use Evernote

Since the first incarnation of this little guide, oodles of people have contacted me with some variation on the following question:

*“How do **you** use Evernote, Mr. Fancy Internet guy?”*

Well, I’ve heard you loud and clear. In this chapter, I’m going to describe to you, in detail, how I use Evernote, how I don’t use it, and how I use it poorly. This should be fun. First, though, a disclaimer that you should keep in mind as you read this chapter:

(Warning: an uninformed sports analogy follows)

Tiger Woods is a professional golfer. Perhaps you’ve heard of him. I’m not sure where he stands now, but during my formative years he was considered to be among the best to ever play the game. At some point, I learned that this golfing prodigy has coaches. Like, *several* of them. To my knowledge, none of Tiger’s coaching staff are moonlighting as professional golfers; they have a fantastic understanding of the mechanics of the game, but (apparently) not the chops to play among the world’s best.

Lots of people think of me as something of a Tiger Woods when it comes to Evernote. You’d do better to think of me as one his coaches. The fact is, I’m a pretty good practitioner of

¹⁸ Let’s not talk about the “those who can’t do, teach” malarky. I’m not a fan of this sentiment and the indicated passage wasn’t meant as any kind of homage to it.

Evernote and its various capabilities, but I'm way better at teaching than I am at doing.¹⁸

That said, let's take a tour¹⁹ of my Evernote account.

STATS

I currently have about 12,500 notes in my account spread across about 85 notebooks. My account contains roughly 1,000 tags and around a dozen saved searches.

A couple of things to keep in mind:

1. I work for Evernote and we use the pudding out of Evernote at Evernote. Many of my notes and notebooks are related to my job.
 2. I've been using Evernote, both personally and professionally, for several years.
-

MY USE CASES

This is going to be pretty lengthy. Buckle up, buttercup.

NOTES

It's in the name of the application, for heaven's sake.

I take a *lot* of notes: notes for work, notes for personal projects and tasks, even notes about Evernote (which has the makings of a fantastic joke, but I haven't been able to get it right just yet).

You'd be hard-pressed to find me without some type of device running Evernote when in a meeting, at a conference, or even having dinner. The great part about Evernote is that

¹⁹ I'm afraid that personal and professional privacy dictate that I not show you certain things. Thanks for your understanding.

my memory is pretty awful most of the time and being able to quickly jot something down no matter where I am is pretty compelling.

My note-taking method for meetings is extremely simple:

Take note of anything worth remembering that came up during the meeting. You know, like everybody does. If the meeting results in a task (which it invariably does)...

- If the task is for me to do, I add a checkbox in Evernote next to the task description.
- For tasks to be completed by somebody else that I need to know about, I append “[W]” to the end of the task (shorthand for “waiting for”).

Finally, I tag the note with `to_process`.

When the meeting is over, I add any tasks to my task manager. Once they're added, I check the box in Evernote. Ditto for tasks assigned to other people. After all tasks have been added to the task manager, the `to_process` tag is removed.

If I want to find any unprocessed meeting notes, I issue this search in Evernote: `tag:to_process todo:false`. That searches for any note containing the `to_process` tag that contains unchecked checkboxes.

As I said—simple.

If I'm awake and clothed, I always have a stack of index cards in my back pocket. If I happen to be without my computer, iPad, or iPhone and need to take notes, I write them down on the cards. When I get back to my technology, I snap photos of the cards and process them as described above.

Irrespective of the media involved, Evernote is my long-term repository for notes. As if there was any doubt, right?

SCANNED PAPER

Evernote is the center of my (mostly) paperless existence. Actually, I have a fairly rigorous set of criteria for what is scanned into Evernote:

Things that are not obviously garbage

Ok, so maybe it's not *that* rigorous.

I'm not really a huge fan of cramming my Evernote account full of stuff that has a slim chance of being useful down the road, but paper is the exception. My thinking is that I really want to not have the physical paper, so sticking it into Evernote is the next best thing and it doesn't require physical space on my desk or in my filing cabinet.

If you're asking yourself, "does he mean [something most people throw away]?", the answer is yes, he does. I'm not a pack rat really, but I am when it comes to paper.

PROJECT RESOURCES

As an adherent to the [GTD](#) productivity philosophy, my daily life is driven by projects.²⁰ While many of these projects don't require any sort of reference or support material, some do. Evernote is where these materials live. Some examples:

- A few months ago, I was the lucky recipient of a speeding ticket (which I absolutely earned, but that's neither here nor there). Dealing with this little bit of fun meant scanning several pieces of paper from the city and the police department. These live in Evernote and are a click away from my "Deal with Speeding Ticket" project in OmniFocus.
- One of my job functions at Evernote is to write documentation for our Developer website (where

²⁰ A "project" in the GTD sense is anything that requires more than one action step to complete. For example, getting my leisure suit dry-cleaned is a project the same way remodeling my bathroom is a project; both will involve taking multiple actions before they project is finished.

programmers can learn how to build applications that work with Evernote). I have an Evernote Business notebook dedicated to brainstorms and other ideas for things that I should write for the site. My coworkers also have access to this notebook and can submit ideas of their own.

- Among my few hobbies is roasting my own coffee at home. Several months ago, my coffee roaster stopped working. I spoke with the manufacturer and learned that I needed to replace a certain part of the roaster. They sent me annotated photos and circuitry diagrams that would aid in the replacement of this part. I also have the roaster's instruction manual as a PDF and, yep, all of this stuff lives in Evernote. One of these days, I might actually get time to make the repair!

If I need to do something, it goes into my task manager. If I need additional information to perform the task, that goes into Evernote.

MEMORIES

Evernote's tagline is "Remember Everything." This is convenient because that's pretty much the opposite of what I can remember on my own (which is to say, almost nothing).

Ok, maybe a bit of an exaggeration, but I forget a lot of things. And as with most people, my already-murky memory gets even worse as the years go by. Evernote has me covered like a warm blanket in this regard.

Some of the more important events I remember with the help of my beloved Evernote:

- **Kid stuff** — My kids (eight and six years old, as I type this) make things. Drawings, art projects, LEGO contraptions and all manner of, well, stuff that kids make. Photos of all of these things as well as scans of the various birthday and anniversary cards they've made for my wife and me over the years all live in a notebook called "Memories."

- **Events and trips** — Evernote is where I create and keep miniature photo albums. When we go on a week-long vacation or out to a nice dinner, I take photos and notes during the occasion and stick them into Evernote. Now I not only remember that we did something fun, but I can look at exactly where and when we did it.
 - **Emails** — Not every email is worth saving, of course, but every so often I'll receive a nice email from a customer or reader (or maybe a personal hero) that I want to keep. Evernote!
 - **Photos** — All of my photos end up in Dropbox, but the special ones end up in Evernote because of the date/location information embedded in the note.
 - **Meals** — I couldn't cook my way out of a wet paper sack, if you want to know the truth. Luckily, my wife and some of my friends are excellent cooks. We like to go out to eat sometimes, too. Using Evernote Food, I make a nicely-formatted record of what we cooked, ate and drank (as well as of everybody who was with us).
-

FINANCIAL AND MEDICAL RECORDS

Like I said in the chapter on security, I'm not exactly a worrywart when it comes to storing sensitive information "in the cloud." Evernote is home to many of my financial and medical documents. Having ready access to historical data about our finances, large purchases, and my family's health is important to me — more important than the risk of some nefarious character gaining access to such information.

TEMPORARY DATA

Despite the not-so-subtle notion of "forever" in Evernote's name, I routinely use it as something of a scratch pad: a place where I can quickly type something that may be of limited use to me a few minutes, hours, or days after I type it.

Some examples of what I mean would include...

- Packing lists for travel
- One-shot task lists
- Project plans
- Brainstorms

What's funny is that this stuff can end up being useful later on, at least sometimes. I travel to Evernote's headquarters a few times per year and whenever I create a new note to make a list of what to bring with me, my past packing lists show up as related notes. Then, I can just click over to one of those and quickly review it to make sure my current packing list isn't missing anything.²¹

It's rather difficult to list all of the types of temporary information I keep in Evernote. There's a lot of it, frankly, and I've trained my fingers to instinctively strike the global "new note" shortcut when I need to make a note of something.

NOTEBOOKS AND STACKS

I have a feeling this is the part that holds the most allure for the folks asking about my personal Evernote setup, so let's dig into exactly how my account is laid out in terms of notebooks and stacks. I'm thinking a hierarchical list is probably appropriate here:

Projects :: Active is a stack containing notebooks related to—yep—active projects. Some notebooks that live in this stack include **EEv4**, which contains information and research about the very text you're reading now, and [Nerdgap.com](#), which is where I store post ideas and general information about my blog.

Projects :: Inactive is a stack containing notebooks related to projects that are complete, on hold, or otherwise inactive. Notebooks in this stack relate to freelance projects I'm no

²¹ I realize I could make a master packing list and just use it each time I travel, but my list does vary depending on when I go and for how long. Also, I'm just not that smart.

longer involved with, entrepreneurial endeavors I've either shelved temporarily or abandoned, and other personal projects related to my home, family, etc.

Work :: Active is a stack whose function is identical to **Projects :: Active**, but geared toward my work at Evernote. **Work :: Inactive** requires no explanation, I think.

Substances is a stack where I keep notebooks related to (legal) substances I have tried or would like to try, such as cigars, whiskies, and beers.

Filing Cabinet is a stack where I keep most scanned paper and other things I need to keep for awhile including tax returns and other financial documents.

Random/External is a stack containing notebooks that are (mostly) populated by other applications or services. **Random Sketches** is the notebook where I sync everything I do in Skitch. **PlaceMe** holds all of the notes created by PlaceMe, a location tracking application that runs on my iPhone (incidentally, PlaceMe is a great app and worth checking out). **Penultimate** is where all of my content created with Penultimate²² is synced.

Past Events is a stack where notebooks specific to past timely events, etc. are kept. Things like conferences, vacations, day trips — even a minor car accident I was involved in (yes, really).

There are plenty others beside what's enumerated here, but that should give you an idea how my account is organized.

TAGS

Tags and I have a weird relationship. While I have *lots* of them, I rely more on notebooks for organization of my Evernote account than I do tags. There are a handful of tags

²² Penultimate is an iPad application whose parent company was acquired by Evernote in 2012.

that are integral to effectively storing and finding certain types of data in my account, but a good majority of my tags are artifacts from a bygone era in my Evernote use.

Put another way, if I whittled down my tag list to the ones I frequently use, there probably wouldn't be more than 40 or 50. The reason I have so many is that, like so many new and enthusiastic Evernote users, I tagged the living pudding out of every thing for a good amount of time and realized after the fact that maybe I was a little overzealous.

THINGS I DO OUTSIDE OF EVERNOTE

Yes, it's true: there are things I *could* do in Evernote that I choose not to. A word of warning here: I'm not saying that it's bad to do these things in Evernote or that you should do what I do. Choose whichever tool and workflow suits you best. I only bring these things up because many people have asked.

Anyway, there aren't a ton of them, but here they are...

WRITING

I do almost no long-form writing in Evernote. This comes as a surprise to some people, so allow me to explain...

My world is a plain text world. I write almost everything in [Markdown](#), a special markup syntax that can be converted to many other formats with relative ease. Many applications²³ for the Mac and iOS support authoring in and converting from Markdown, but Evernote isn't one of them (as I write this — who knows what the future holds?).

Plain text also offers me the ability to manipulate it using software that already exists. For example, if I wanted to get a ballpark estimate of how many words are in the current draft of this guide, I could jump over to Terminal.app and type this:

```
cat ~/EvernoteEssentials/*.md | wc -w
```

²³ On the Mac, I use an application called MacVim to write just about everything (text as well as software). On my iOS devices, my preferred apps for writing are Drafts, Byword and Editorial.

That would spit out a word count for every Markdown document in the [EvernoteEssentials](#) directory.

While I could duplicate this functionality by making a small application that talks to Evernote's [API](#), the above command is far simpler.

I think it's pretty obvious that I love Evernote, but the way I create prose these days offers more flexibility than Evernote can currently provide. It's also worth pointing out that I work in technology and have been writing software, in some capacity, for over a decade. My choices in tools are probably different from yours. Don't take this last section as an admonishment from me that you not write in Evernote; use the right tool for the job. Lots and lots of people find Evernote to be a great writing tool.

TASK MANAGEMENT

This is something I tried to do a few years back with mixed success. I'm actually not very bright and, as such, I need my task management software to be really smart and require little in terms of ongoing maintenance. OmniFocus is my task manager of choice (and has been for some time) because it lets me do things like these:

- Dependent actions — “don't show me this task until these other three have been marked as complete”
- Repeating tasks — “add this to my task list every other Thursday”
- Location-based reminders — “make a loud noise when I'm near a grocery store and remind me to buy milk”

Evernote can't currently do any of those things.

While it's absolutely possible to create a serviceable task management system using Evernote (Google for “Evernote GTD” or “Evernote task management” if you don't believe me) it doesn't currently do what I need. These things happen.

Truth be told, Evernote still handles an important function in my task management world: reference material. A good number of my tasks contain links to Evernote notes that contain information required to complete a task. For example, if my task is “get new tires put on the car,” I might link to the receipt from the *last* time I had new tires installed so I know the size, make, and model. I use Evernote very extensively in this capacity.

MY EVERNOTE MISTAKES

This section is a little embarrassing to write given how heavy of an Evernote user I am (and the fact that I’m a *employee*, for crying out loud), but I decided that this chapter would contain the good as well as the bad.

NOTEBOOK MANIA

I create lots of notebooks. In fact, that’s my default behavior when I come across a group of notes I want to keep together (as opposed to a common tag). When I said earlier that I have around 85 notebooks in my account, that’s after culling the list down from well over 100. In fact, I failed to heed my own advice as outlined in the chapter on setting up a new Evernote account: I created many notebooks willy nilly and many of them contained fewer than 10 notes before being escorted gently to the chopping block.

OVER-AUTOMATION

As Evernote grows in popularity, it’s getting much easier to automatically add content to your Evernote account (e.g., forwarding email based on filters). Applications and services that do this aren’t bad at all (I still use several), but they can quickly gunk up your account with extra data you don’t really need or want and that will make your interactions with Evernote a bit more sluggish.

I fancy myself a fellow who doesn't mind getting his hands dirty with new and creative applications that integrate with Evernote, but it's routinely bitten me in the form of dozens or even hundreds of notes created without my direct involvement. Situations like these have ended up with me spending time I didn't need to spend cleaning up the mess (or, if I'm honest, creating and subsequently deferring a new task instructing me to clean up the mess).

IGNORING THE INBOX

My vehemence in advocating the use of an “inbox” notebook for incoming notes notwithstanding, I routinely let the contents of my @Inbox notebook lie fallow for weeks or months at a time. I even created a notebook called “DMZ”²⁴ and shoved several hundred notes from @Inbox into it for later processing (and, I'm somewhat embarrassed to admit, the vast majority of said notes are still sitting there).

Laying bare my shortcomings as an Evernote “power user” isn't exactly my idea of a good time, but I'm persuaded that my own mistakes can be just as instructive as the myriad best practices and tricks I've cooked up over the years. Hopefully, you'll agree and have learned a few things not to do.

SUMMATION

It's important to remember that the preceding wall of text represents how I use Evernote, not my prescription for how it ought to be used. As the old proverb goes, “one man's tag is another man's notebook.” Or something.

²⁴ This is an abbreviation of “demilitarized zone,” a military term describing an area where military action is not permitted. Nerdy types use this term to describe an isolated section of a network or block of data.

Setting Up a New Evernote Account

I'm regularly asked for advice on how to set up a brand spanning new Evernote account. Common questions include...

- How many notebooks should I create?
- How should I employ stacks and tags?
- How can I make sure I'm getting the most out of this application?
- Where can I find an honest drink in this town?

Except for that last one, the discussion quickly becomes... *philosophical*.

START WITH “WHY”

When I first started using Evernote (shortly after we invented the wheel), I went a little crazy. Ok, fine. A lot crazy.

I was a notebook-making machine. I tagged every note like it was going to be outlawed the next day. Instead of letting the data dictate the organization, I created an insane system of categorization and organization and tried to shoehorn my data into it. It probably won't surprise you to learn that, before long, I was looking at the organizational equivalent of a plate of spaghetti.

Take it from me, there's a better way: identify why you're using this thing in the first place.

START SMALL

Wanting to shove your entire life into Evernote a half hour after you've installed it for the first time is a powerful urge. It's so big and empty and accepting of all of your stuff, why wouldn't you?

I would advise against this. Well, at first. You have to crawl before you can walk, after all.

Most folks have a thought when they launch Evernote for the first time after installing it. It goes something like this:

“Man, this will be perfect for [something]!”

That “something” will, in many cases, be where you should start – and only there.

If you've been dying for a place to catalog the growth habits of your organic squash or a simple tool that can be used to organize your collection of antique waffle irons, then that's precisely what you should do with Evernote at first. Use that singular need as a means to get familiar with the software and, more importantly, your own way of using it. Avoiding the trap of immediately lobbing every email, photo, and scanned document you have into Evernote will serve you well.

GROW ORGANICALLY

I'm not saying that you have to spend a month stifling your budding love affair with Evernote. The point here is to avoid creating a massive organizational headache for yourself later on. It's a good deal easier to let your Evernote use grow as it occurs to you than it is to spend a weekend or two cleaning up a mess that didn't need to be made in the first place.

After you've gotten the hang of Evernote, you should slowly and deliberately begin introducing it to different parts of your life. If you started by making an exhaustive notebook of recipes (a very common use case, by the way), try using Evernote to plan and execute a project of some kind; maybe a bathroom remodel or that ipe wood car²⁵ you've been meaning to build with the kids. Evernote can be a powerful companion when you need to collect and organize a bunch of information that's all oriented around a certain task. The ancillary benefit here is that you'll have a meticulous record of *how* something was done, as well as the finished product itself.

Choose your own adventure here, but heed this warning: go slowly. You'll spend more time becoming familiar with Evernote and less time rearranging and reorganizing later on.

SETTING IT UP

Now that we've gotten all of the abstract weirdness out of the way, let's get to the meat: what kinds of notebooks should you start with?

As previously mentioned, I'm not going to shut up about having two notebooks, minimum: an inbox and a general archive.

The inbox (mine's called "@Inbox", if you're curious) is what I use for what Evernote calls the "default notebook." Any time you add something to Evernote and don't explicitly name a destination notebook, your new addition will be placed in your default notebook (which is configurable using the Windows, Mac or Web versions of Evernote). This means that you now have a staging area for any new stuff you add to Evernote. Every so often, go through your inbox notebook and organize what's in there: add tags, change the note titles if need be, then move each note into its permanent²⁶ home.

²⁵ Just in case you think I'm pulling this goofy example out of thin air, I have a huge plank of this impossibly strong wood gathering dust on the side of my house that may one day become part of a wooden car I started building with my son.

²⁶ For now, anyway.

The general archive (mine is “Archive”) is where I put things that don’t belong in a specific notebook. I’m not much of a sports guy, but every now and again I’ll read an interesting article online about something related to sports. If I want to save the article forever, I would shove it into my general archive because I don’t have any sports-related notebooks in my Evernote account.

Another excellent use for the general archive is to get an idea which notebooks you might want to create. If you find yourself collecting a whole bunch of information about bees or something, it might be a good idea to pull out all of your bee-related notes and put them into their own notebook. Maybe call it “Bees.”

Finally, the general archive is a great place for notes that previously lived in their own notebook, but are no longer of immediate use. If you have a notebook called “Crazy Web Project” that contains various information relating to a crazy web project at your job, you probably aren’t going to need those notes for the rest of your life. Maybe you leave the company or the project is cancelled, whatever. Once the notebook is no longer worth keeping, give the notes in it a common tag (like “Project - Crazy Web” or something) and drop them into the general archive. This way, they’ll still show up in your search results and you’ll still have access to them, but they won’t be taking up a whole notebook in your account.

REGARDING TAGS

My only advice here is to tag your notes carefully. It’s easy to start applying a bunch of tags to each note in your account as you start using it, but overly-enthusiastic tagging can, over time, turn your tag list into a massive pile of stuff that doesn’t mean much and that you mostly ignore.

Tags are a great way to create relationships between seemingly disparate information. If you have a notebook for your huge collection of cumin waffle recipes, tagging each note with “cumin” and “waffle” isn’t going to help you very

much since you're not adding useful information to the note. Try to avoid being redundant when tagging your notes.

You might consider avoiding tagging altogether until your account begins to take shape. It's simple enough to tag several notes batch-style after the notes are in your account. Deleting a mess of unused tags, however, is a tedious exercise that will likely require a stiff drink. Don't tag anything unless it makes sense to do so.

GOING FORWARD

Creating an unordered pile of information in Evernote is easy. Some people choose to use it this way and it works well for them, but I think taking a bit of time every so often to evaluate how the software is working for you can result in a better experience, overall.

Here are a few things you can do periodically to ensure that your account is organized and as useful as it can be:

- Remove any tags that are only used once (or not at all).
- Look for notebooks containing only a small handful of notes and archive those notes, if possible.
- Search for notes with cruft in the titles (e.g., "Fwd:"); clean them up and stick them in the appropriate notebooks.

The important thing to remember here is that, to get the most out of Evernote, you'll need to perform regular maintenance on your account. Regularly taking a few minutes to clean things up will pay dividends as your account grows around you like a nice denim jacket.

Evernote + Security = Hugfest

We're going to take a break from our fun-filled Evernote travels to talk about something that's equal parts necessary and unsexy. No, not flossing.

Security!

Let me begin by saying two things:

1. I'm not a security expert or anything even *remotely* resembling a security expert.
2. I'm absolutely not going to advise you one way or the other about keeping sensitive data in Evernote.

I will say that storing data with any third-party service incurs a certain measure of risk, so you'll need to decide whether that risk is worth it or not.

If you're wondering, I keep plenty of information in Evernote that some people would never dream of storing there. Neither of us is right or wrong, I don't think, but that's where I stand; the convenience of having access to all of my stuff from anywhere is worth the potential downside.

Just to restate: do what you feel comfortable with. I'm not your father (though, I'm guessing he'd probably tell you something similar).

Moving on.

There are a couple of security features offered by Evernote you should know about: two-step verification and note encryption.

TWO-STEP VERIFICATION

Known in nerdier circles as “two-factor authentication,” two-step verification makes it difficult for some nefarious character to access your account. Here’s how it works...

When you enable two-step verification on your account, you’ll be asked for a mobile phone number. Evernote will verify that you have access to the phone whose number you provided. From that point on, each time you login to Evernote or any other Evernote product (Skitch, Clearly, etc.) you’ll be sent a numeric code via text message that you’ll need to enter in addition to your username and password. The security implications here are pretty obvious, I think: even if somebody gets ahold of your Evernote login information, he’s also going to need to have your phone with him in order to gain access to your account.

“What about if I’m in an airplane or a submarine and I can’t get text messages? Hmm?”

When you set up two-step verification, you’ll be issued a set of single-use backup codes. These codes can be used in place of the code sent via text message if you aren’t able to receive text messages (for whatever reason). Note that each of these codes can be used only once. After you use one, it’s of as much use to you as yesterday’s winning lottery numbers and can be deleted.

“Ok, so should I set this up or not?”

Two-step verification is not a requirement for all Evernote accounts. Whether you use or not it is up to you. While it does add a measure of security to your account, it also adds a measure of complexity that some people don’t think is worth the trouble.

Know that, if you decide to enable two-step verification, you can always disable it by logging into Evernote Web and choosing the Security tab under Settings.

(I have it enabled, for what it's worth).

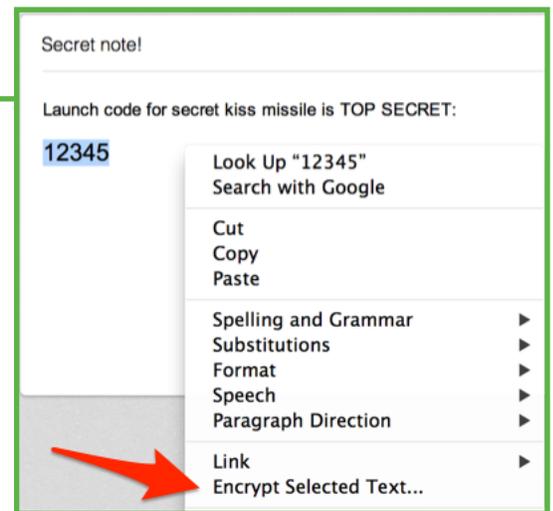
NOTE ENCRYPTION

Evernote for Windows and Mac gives you the ability to encrypt text within your notes. Just highlight a portion of text, right-click, and choose "Encrypt selected text."

You'll be asked for a passphrase that you can later use to decrypt this text. Please realize that if you encrypt a piece of text and forget the passphrase, it's as good as deleted. Neither the Evernote system nor staff has any way of recovering your encrypted data, so be very careful to either use a passphrase you'll remember or consider using the same passphrase for all of your encrypted text.

Encryption is great for things like passwords, account numbers and other sensitive information, but be sure to remember that you can only encrypt regular text within notes; the application currently doesn't support encrypting things like files (including images and PDFs), nor does it allow the encryption of whole notes or notebooks. You can, however, encrypt your content before adding it to Evernote if you're more comfortable. The only thing is, the data won't be searchable by Evernote and, obviously, you'll be responsible for decrypting it when you'd like to see or use it.

Alright, let's get back to the good stuff.



Use Case: Evernote for Travel Junkies

Being a work-at-home kind of fellow, I make regular trips to Northern California to remind everybody at Evernote that I still work there (and show off some choice selections from my admirable collection of nerdy t-shirts). It probably won't surprise you to learn that all of the details of each trip are carefully documented in Evernote before I order even a single Gin and Tonic at the airport bar. Joking, Dave.

Whether you're setting off to traverse the globe or heading away for a weekend getaway, Evernote can be a fabulous tool for managing all of the details of your trip. Let's take a look at a few examples.

Together.

PACKING LISTS

Before I go anywhere, I make a new note in Evernote where I list everything I'd like to bring with me: clothes, gadgets (including chargers!), and other miscellany.

The ninja move here is to create the list using the built-in checkboxes provided in the Evernote note editor so you can mark things as packed as soon as they enter your fancy luggage (or plastic garbage bag — I'm not here to judge). Double ninja points for setting a reminder on the note to beep at you a day before your flight, lest you forget to pack and are left shoving handfuls of clothing into your suitcase five minutes before you're slated to leave for the airport.²⁷

²⁷ If it sounds like this has happened to me before, that's because it totally has.

TRANSPORTATION AND LODGING

When you book your flight(s), you're almost certainly going to be issued a confirmation number along with the flight numbers, airport codes, and other tidbits that you'll want to have accessible when your Uncle Roger begrudgingly pawns you off to the skycap at some unholy morning hour.

Ditto for whatever hotel/motel/B&B/hostel you'll be calling home while you're away from your real home. This part won't really concern Uncle Roger.

Personally, when I'm planning a trip, I create a note called "Flights" which will contain the following information:

- Departing and arriving flights (with flight number and appropriate times)
- Confirmation number (or numbers, if flying on multiple airlines)
- Any frequent flyer numbers associated with the airline I'm flying
- The "holy crap something went wrong" phone number for the airline so I can call them if something goes wrong and say "holy crap something went wrong!"

Unsurprisingly, I'll also make a note for the hotel(s) where I'll be staying (or hostels, but I've never done that, so whatever). That note will house the following:

- The check-in and check-out dates of my stay. I'll also note the check-out time for the day I leave to ensure I'm not automatically booked for an extra night if I happen to oversleep.
- The name, address and (direct) phone number for the place. This gets emailed to my wife and other family members before I leave to ensure that they know where I am and how to reach me if I drop my iPhone into a pitcher of margaritas. If possible, it's best to get the phone number of the front desk instead of the reservation line, since that will almost certainly ring somewhere *other* than the actual hotel.

- A direct link to the Google Map of the hotel's location so I can quickly look it up on my phone when I get into town. This makes getting there **way** easier and saves me from having to key in a long address while trying to hail a cab or negotiate a finicky rental car.

After I check in, I'll append the following info to the above note:

- Room number and direct-dial phone number
 - Wireless password for the hotel WiFi
-

EXPENSES

Most of my travel is for business, so I need to keep track of whatever money I spend while away so I can file the requisite expense report when I get home. This is a painfully simple process:

1. Snap a photo of the receipt showing the amount you paid, an itemized list of what was purchased, and the place where you bought the stuff.
2. Add this to Evernote (and maybe tag it with "expense").
3. There is no step 3.

When you get back, putting together your expense report will be dead simple. Also, your company may handle such things using a snazzy web service that integrates with Evernote (like Expensify, which we use and is pretty great). Look into that yourself or maybe shoot Helen in A/P an email before you leave.

THINGS TO DO, SEE, AND TASTE

Whether yours is a business trip or a pleasurable sojourn, it can be pretty handy to have a list of places you'd like to visit,

restaurants to try, and—if you're anything like me—breweries to check out.

Create a new note and make a list of any of the above things you'd like to experience while you're in town. Bonus points for including things like:

- The address, phone number and map link for the location.
- The names of particular dishes or beverages that you're interested in trying.
- People to ask for; this can be cool if a buddy says “Head to Joe's bar and order the Sleepytime Elixir — and tell them I sent you.”

While at each of your selected spots, make sure to create a new note in Evernote using your mobile phone or tablet (if you're an iPhone or Android user, [Evernote Food](#) is awesome for this). This is because this will not only capture your location, but also the date and time you were there. Snap plenty of photos while enjoying the visit so you can brag to your friends about that croissant you had in Old Paris right before you *show it to them*. They'll kinda hate you and you'll relish in it. Mmm... relish...

REVISITING AND RECOMMENDING

I try to create oodles of notes when I travel and I make it a point to use my iPhone because, as I said a second ago, that will automatically grab the GPS location information for wherever you are. Then, if you ever come back, you can plot that really awesome sushi joint on a map and find it again with the greatest of ease.

You can also use your Evernote mojo to let friends know about that *fabulous* slice of carrot cake you had in The Mission when you last visited San Francisco (and exactly where they can go to get it). Your friends will like you more if you start doing this, I think.

CONCLUSION

I don't travel nearly as much as some pals of mine, but I really enjoy going back and looking at the various trips I've taken in the last few years. Consider adopting this as part of your overall Evernote "engagement strategy" or something!

Use Case: Evernote for Parents

As I mentioned earlier, my lovely wife and I have a couple of small children that we've come to really like.²⁸ Having these two little pirates running around has created all sorts of interesting opportunities for using Evernote. And, since you're probably keen on knowing what they are, I'm going to enumerate them for you now. Super!

PHOTOS

Since Evernote *automagically* adds the current date and time when you create a new note, it's a fabulous way to, you know, store pictures of your kids. Do this early and often. Evernote's monthly upload allowance for Premium users is large enough to allow for hundreds of high-resolution photos to be added each month, so you don't need to wait until they're in a suit or a dress to start capturing what your kids looked like when they were young.

AS THEY GROW

Remember how every once in a blue moon your mom would snap a photo of you next to a tape measure or some yardstick affixed to the doorjamb in the kitchen? Well, with Evernote, you can pop that same photo into a note (or just type their height into a note using text, but that's not as fun). Maybe pick a date each month when

²⁸ We're even thinking about keeping them!

you drag them away from the Xbox and, under duress, stand them against the yardstick. Keep this up and, before long, you'll have a nice, organized record of how quickly your kid grows. No slouching!

I also like to do this whenever I take one or both of my kids to the doctor. Part of the check-in procedure at our doctor's office is to measure height, weight, and blood pressure. This can be handy information for when, as adults, they blame their high blood pressure on you as parents.

Which makes a nice segue into the next point. I love a good segue.

MEDICAL STUFF

If your kids are, well, *kids*, chances are they spend a good bit of time each year in a doctor's office for one reason or another. While your doctor is explaining to you why, exactly, your kid's eyes have turned from blue to a deep brown, you can type all of the info right into Evernote.

Bonus: our doctor emails us a recap of each visit we have with him, so it's a piece of cake to forward that to your spiffy Evernote email address. That way, it's right there in your account if you ever need it.

DRAWINGS

Between the ages of 3 and 8 or so, your kids (if they're anything like mine) will be extremely prolific artists. In a given week, I'll usually get between 4 and four dozen drawings excitedly delivered to my desk. As much as I love my kids, most of their drawings aren't exactly Picasso-quality works and shoving them crudely into some filing cabinet isn't helping anybody.

This is yet another reason why my Fujitsu ScanSnap document scanner is worth its weight in gold. As each

drawing enters my life, it's sent through the scanner (which sends it directly into Evernote, of course). I'll add a short, descriptive title to the note and tag it with whichever kid produced it, then file it away:

If one drawing turns out to be particularly good (or I just like it a lot), it may earn a coveted spot on my office wall for awhile. Otherwise—and I refuse to feel bad about this—it gets quietly tossed in the trash. Don't judge me.

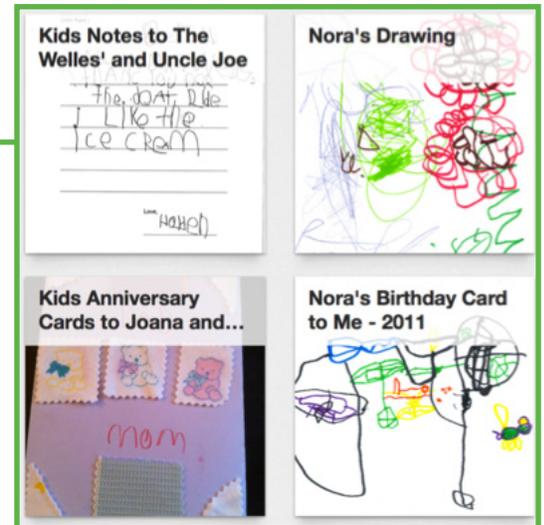
PAPERWORK

Whether it's for school, extra-curricular activities, or whatever else, having kids means getting paper, particularly when they start approaching four and five years old. As you might have guessed, I'm going to go ahead and recommend that you scan that stuff into Evernote. Not much else to say about that, really.

FOR THEM

One day, I'll be able to show my kids all of this stuff. I'm not going to hand them a legal file box full of disorganized photos and the occasional report card that I managed to hang onto. Oh, no. I'm going to be able to give them a running diary of their lives as they grew up. It'll contain the big moments like birthdays and graduations and such, but it will also be chock full of the more everyday stuff that happened through the years; things that I wanted to remember for no reason in particular.

The cool thing about capturing your children's lives using Evernote is that you can add and add and add with abandon and you're not governed by the number of empty pages in the half-full photo album on the coffee table. Capture everything — you never know what will send you flying back to a cherished moment in your family's history.



Use Case: Going Paperless with Evernote

Desks and workspaces the world over are covered in paper. Financial documents, health insurance forms, insurance agreements, cumin waffle recipes clipped from food magazines — you name it. And for many of the owners of such clutter, the idea of moving all of it into a digital system that's automatically backed up is, to say the least, attractive.

But, as with anything worth doing, converting wholly to the paperless lifestyle requires a bit of strategy, work, and—most of all—time. I wouldn't say it's a difficult endeavor, but I wouldn't say it's easy, either.

Luckily, there are few software systems as well-suited for this type of life as our beloved Evernote. If you have a document scanner (ideally, one that integrates well with Evernote), then you're 90% of the way there.

Let's talk for a bit about how this works, the best ways to go about it, and some nerdy tricks for making the process as friction-free as possible.

THE BUILDING BLOCKS

Evernote Account

Hopefully you've got one of these by now. For this endeavor, though, you're probably going to need a Premium account, at least temporarily. A few reasons why:

- When you start scanning documents into your account, you're going to be uploading a *lot* of information. The 60mb of uploaded data per month allotted to Free accounts will almost certainly be insufficient, particularly if you're going to do a large initial "info dump."
- One of the biggest benefits of going paperless with Evernote is the ability to search for text within PDF documents. At the time of this writing, this type of search is only available to Premium accounts.

Of course, you could get by without a Premium account if you're not dealing with a huge amount of paper and the search stuff isn't terribly important to you. But, if you're surrounded by massive piles of paper and you want it all in Evernote, you might consider signing up for a Premium account for a couple of months while you import everything, then moving back to a Free account. It won't cost a ton of cash and you'll have plenty of space to upload all that paper.

If you're already a Premium subscriber and you think the 1gb allotment may not be enough for your first month, you can purchase additional upload space for \$5 per gigabyte. There are some restrictions, but it's a good way to pad your upload allowance for the big initial import.

For the record, I'm (obviously) a pretty heavy-duty Evernote user and I've never gotten *close* to running up against the 1gb limit for my Premium account. So don't go buying additional upload allowances unless you really need it because, chances are, you won't.

Document Scanner

I have good news and bad news.

Bad news: You're going to need to buy a document scanner if you're serious about this paperless stuff. There's really no way around it. And a good one isn't super cheap.

Good news: You'll wonder how you ever lived without it once you have it. Totally serious.

As I mentioned in an earlier chapter, I'm a huge fan of ScanSnap scanners by Fujitsu. I've been using one for almost four years now and I'm probably going to instruct my family to bury me with it. A good scanner, used moderately, will last you a long time.

The reason I'm such a fan of the Fujitsu scanners is their tight integration with Evernote. The ScanSnap Manager software (which ships with the devices) can be configured to scan documents directly into your Evernote account with a single tap of the "scan stuff" button on the front of the scanner.

There are several alternatives to the ScanSnap that integrate with Evernote, so evaluate all of your options before you buy. The [Evernote Trunk](#) is a great place to peruse the various document scanners that work with Evernote.

CHOOSING A FORMAT

This part is important.

Most document scanners (including the ScanSnap) give you the ability to choose one of several file formats for your scanned documents. These options generally fall into two categories:

- Various image file types (JPG, PNG, TIFF, etc.)
- PDF

Here's a good rule of thumb for deciding which type of file format you want your scanned documents converted to when scanning:

If it contains handwritten text, you want it to be a regular image (JPG or PNG, ideally). Otherwise, choose PDF.

You might be wondering why I make such a recommendation. Well, it's your lucky day because I'm going to tell you.

Evernote's Optical Character Recognition (OCR, the thing that lets you find text in images) works like this:

If the file is a PDF, it looks for formatted (as in, type-written) text and generates a second copy of the PDF that contains whatever text it finds. This second PDF is embedded in the first and won't be visible to you, but it makes searching PDFs possible. Evernote does *not* index hand-written text in PDFs.

If the file is an image, then it will be evaluated for both handwritten and typewritten text. The reason we don't just scan everything as an image file is that PDF documents offer plenty of cool features like multi-page documents and the ability to highlight and copy blocks of text.

SCANNING, ORGANIZING, AND NOT LOSING YOUR MIND

Depending on the document scanner you choose, there is one fairly universal truth: the names of the notes it creates will be, by and large, totally meaningless.

Things like the date expressed in some inscrutable fashion ("2012081300457243.pdf"), or maybe something like "Document24.pdf": that's what you're likely up against. It's a little aggravating, honestly, but we play the hand we're dealt.

The simple fact is this: anything you scan into Evernote will need some *massaging*: a new, meaningful title, some tags perhaps, and placement in the proper notebook. In other words: once you've scanned the document, your job is only partially done.

Tagging and notebook-ing are somewhat important here. If your stack of scannable stuff is from many different sources and deals with many different areas of your life, you'll be best served by having a system that will let you find and group this stuff later.

Perhaps something like this:

- For bank statements, stick them in a notebook called “Banking” and tag them with the name of the financial institution and the year the statement was issued.
- For medical stuff (bills, statements, policies, etc.), tag them with the name of the insurance company, hospital or other entity. Probably you’ll want to put such a note into a “Medical” notebook (or even a vendor-specific notebook, if you’re going to be dealing with a lot of paper from this company).
- If you keep your car service records (stuff from the oil change place, dealership, brake place, etc.) you should consider tagging each note with the name of the place that performed the service, the car in question (yes, even if you own just one) and maybe the type of service performed (“oil change,” “engine rebuild,” etc.).

There are two important guiding principles here.

First, you want your stuff be **easy to find**. All of this organizational nonsense isn’t worth squat if you can’t easily find what you need when you need it. Keep this in mind when deciding on things like notebooks (both the number of notebooks you have and how they’re named).

Second, remember that you’re going to be doing a good bit of skimming when you’re looking for a particular note. By this, I mean that, most of the time, when you search for something or view a notebook, you’re going to be looking at a list of notes instead of only the note you want. For this reason, make sure you can identify the contents of the note by seeing only the title.

For example:

When you scan in a copy of the work order from your favorite oil change place, don’t just call the note “Oil Change Paperwork” since, if you have more than one of these, you’ll have to open each note to find the one you want. Instead, consider naming your note something like “2012-07-25 :: Mustang :: Oil Change Paperwork.” The more knowledge you

can bake into a note title, the better off you'll be when you're looking through a list of a few dozen notes.

STRATEGIES: YOUR INITIAL IMPORT

In my experience, the biggest obstacle when trying to go all paperless and stuff is, well, the metric pantload of paper you'll have to import when you begin. Fear not, weary paper-havers, for there is a secret.

You don't have to do it all at once.

The first step is to sort your cache of paper into two piles:

1. Stuff I Need in Digital Format Yesterday or The World Will Explode
2. Everything Else

Once you have your two piles, scan the first pile into Evernote (we'll talk about this more in a second, hang on). Then, grab a box or other container large enough to house the second pile. Place said pile in said receptacle. This will become the pile you scan when you have a random block of time with nothing to do.

If your date cancels on you or your favorite sporting event is postponed due to whatever causes the postponement of professional sporting events, scan some of the pile of stuff. Do this enough and, after awhile, your "everything else" pile will be gone.

STRATEGIES: WEEKLY SCANNING

I actually have a dedicated "to scan" tray on my desk. Throughout the week, I'll receive things in the mail, etc. that need to be scanned and just stack them up there. Then, on Saturday night (I'm an old married guy, don't judge me) I'll sit down with a modest pour of a delicious grown-up beverage

and an interesting podcast in my ears and just *scan*.

Better yet, if you find yourself with a spare 20 minutes and you can either plop down in front of a television show or do some scanning, choose the latter. The fact is, scanning all of the paper that enters your world takes time and can only be done so quickly.

This is an important discipline to develop for aspiring paperless-ers. If you don't keep up with your scanning, before you know it you'll be faced with yet another massive pile of stuff that will take a great deal longer to go through.

STRATEGIES: EASY NOTE NAMING

Naming all of these notes can be a somewhat tedious endeavor, to be sure. Luckily, tools exist that let you quickly create the right kinds of note titles with very little typing.

Text expansion tools like [Breevy](#) for Windows and—my personal favorite—[TextExpander](#) for the Mac make it simple to, for example, create our oil change note title. Create a new snippet in either of the above tools that will plug in the current date (formatted correctly), the name of your car (or a dropdown if you have multiple cars), and the words “Oil Change Paperwork.” In TextExpander, the snippet text would look like this:

```
%Y-%M-%D :: [car dropdown text] :: Oil Change Paperwork
```

If I assign this snippet to run when I type “;;noil” (‘n’ for note, ‘oil’ for obvious reasons) and type those characters in the note title field in Evernote, it will open up a pop-up window where I’ll choose the appropriate car and hit Return. The note title will look exactly like our example from before. Like magic, really.

That example might be a bit more complicated than we want, but you get the idea. Here are a few other potentially useful snippet ideas:

- The date (formatted as above). Maybe assign this snippet to “;;nd” (for note date)
- The name of your bank or other financial institution as “;;nbank”
- The name of your health care provider as “;;nheal”

With this kind of tool in your toolbox, you can quickly build meaningful note titles that are easy to skim and, as a bonus, will sort correctly by date (if you have Evernote set to order the notes by title).

One more thought on the date stuff: consider making the date in the note title correspond with the date noted on the scanned sheet. This adds a little extra work since you'll have to manually input the date, but it will make your life easier in the long run (if you ask me, anyway).

STRATEGIES: FINDING SCANNED PAPER

I know what you're thinking.

“This is a fine and good, Mr. Nerdy Pants, but how can I quickly and easily locate my scanned documents when I need them? Hm?”

Glad you asked.

We talked a bit about Evernote search in an earlier chapter. This is one of many practical uses for those super-snazzy operators mentioned before — specifically, the `resource` operator which lets you search for notes that contain specific types of attachments.

So, let's say you wanted to find all of your oil change paperwork for 2012. You would do just fine to issue a search like this:

```
intitle:"Oil Change" resource:application/pdf intitle:2012
```

Assuming you've been good boys and girls and have named your notes properly (as described earlier in this chapter), that search will give you all of the notes in your account that have "Oil Change" and "2012" in the title and that have a PDF file attached to them. Not bad, eh?

The `resource:application/pdf` bit is key — it tells Evernote that we're only interested in notes containing PDF file attachments. If you're looking for an image file, use `resource:image/*` instead (which searches for all image types).

REGARDING SENSITIVE INFORMATION

I'm not going to shut up about this: all budding Evernote enthusiasts will, at some point, need to make a decision about storing sensitive information in Evernote. The fact is, your account—like just about every other Internet site or service you use—is protected only by a username and password.²⁹ Anybody who is able to figure out these two bits of info will have unfettered access to **all** of the information in your account.

The question, of course, is "do I need to worry about that?"

The answer depends entirely on your comfort level with such things. The folks at Evernote aren't slouches and have taken every precaution to ensure the safety of your information, but storing information online *anywhere* carries with it a certain amount of risk. If you don't want to take such a risk (or the conduct standards of your profession don't allow you to take such a risk), then you should probably find a new home for your most personal info — by which I mean things like financial or medical information.

If you're not comfortable with the idea of housing sensitive information in Evernote but still *really* want to do it anyway, there is a way to do it. You'll lose some of the benefits of having your documents in Evernote (like searching the

²⁹ Unless you decide to enable that two-step verification we discussed in the Security chapter.

contents of said documents), but they'll still be available if you need them. You'll have to encrypt your information *before* adding it to Evernote.

There are several different ways to encrypt a random file or piece of information and, frankly, they're beyond the scope of this guide. If you'd like to pursue this option, search Google for "how to encrypt a file on [your computer's operating system]."

IN CONCLUSION

I may be biased, but I can't think of a better system for going paperless than to scan all of your stuff into Evernote. The best advice I can give is to acquire the necessary tools and just *get started* — it will absolutely take some time to empty your file cabinets, but having all of your paper in your pocket will be worth the trouble.

Use Case: Archiving Your Social Media Offerings with Evernote

It may surprise you to learn that many, many people have started blogs in the last few years. There's even a slight chance that you, dear reader, have a blog of your own. You might also utilize one of the many popular social networks like Twitter, Facebook, Instagram, and others.

There's a problem endemic to most of these platforms. While your data still remains your property under the various Terms of Service agreements given by the services you use, it's a big pain in the keister to easily access all of your data and move it somewhere else, even for archival purposes. It can usually be done using the platform's Application Programming Interface (API), but using that complicated thing will almost certainly require the work of a software developer.

Thankfully, there exists a service that makes archiving all of your social media content a snap. And guess what? It saves it to Evernote. Unsurprisingly.

It's called [IFTTT](#) (short for "If this, then that"). The way it works is pretty simple. When something happens with one of your social media accounts (or a plethora of other services, actually), you can configure IFTTT to take a certain action. For example, every time I post something to my blog, within 15 minutes IFTTT scoops it up (using the RSS feed) and the post is saved in a new note in my Evernote account. It also includes the URL of the post, so I can view it on the original site if I so desire.

Take a look around IFTTT and you'll find that all of these solutions are simple enough to implement. Check out [this blog post](#) I wrote describing the steps to back-up your stuff like I mentioned earlier in this chapter.

Caveat: As of this writing, IFTTT has been up and humming along for many months. But, since it's a free service, I have no idea how long it will exist or continue to perform its duties reliably. If it should stop being available, then this chapter isn't really going to help many folks. For the time being, though, it's a killer solution that I personally use to back up all of the following to Evernote:

- All of my blog posts on every blog I write for
- All of my Instagram photos
- Foursquare check-ins

OTHER SOCIAL SAVE-ABLES

Aside from automatically backing up everything you post on the Internet, there are other narcissistic tidbits I like to clip to my Evernote account, such as

- Blog posts that mention me or my work (positive or negative)
- Audio podcasts that mention me or my work (these audio files are generally under 100mb, the maximum size of a single note for Premium users)
- Nice emails sent to me by readers, listeners, or customers that can be used to drag me out of a funk, should the need arise

These types of content are useful in determining what I'm doing right as well as wrong. I'm particularly interested in the latter case, actually, because that's what will help me improve my craft and put out better stuff that more people will (hopefully) enjoy.

In an era when creating content is seen as the backbone of any meaningful online work, I've come to see a great deal of value in making permanent copies of everything I say as well as a curated collection of what other people say about me. Perhaps this isn't true for everybody, but I think it's a common enough problem to warrant pointing out a reasonably simple solution.

Use Case: Evernote as Your Personal History Book

We've already discussed, at some length, the various bits of information for which Evernote is the ideal home. Truthfully, we've only just scratched the surface of what could (and, perhaps, should) be stored in Evernote. But there's a more subtle benefit to adopting the Evernote lifestyle, as it were.

Information, memories, and such are much more potent when viewed in the context in which they originally took place. A heavy Evernote user, like myself, adds lots of new stuff to Evernote, usually on a daily basis. The types of things I add to Evernote vary quite widely: meeting notes from work, things I say on Twitter, photos of my kids, random ideas, and so on.

This mountain of seemingly disparate information has become my personal history book.

I can jump back to any point over the last five years (as I write this) and get a pretty good idea about what I was thinking and doing at that time. For example, I see that a little over one year ago I took my kids to a baseball game, met an Internet friend for dinner for the first time and was—apparently—really interested in desk organization techniques, based on the articles I clipped. I can skip a few days backward and see that I went to a independent movie premier on a short trip to Portland, Oregon. Jump a few days ahead and I'm immediately taken back to a trying few days wherein I attempted to learn to use Xcode (Apple's software development environment).

You probably see where I'm going with this.

All of those memories become far more compelling when I can look back at everything else I was doing at the time. It's pretty great and the best part is that I don't need to do anything other than what I'm already doing: enthusiastically using Evernote.

HOW TO DO IT

There's really only one way to make Evernote into your history book: add lots of different things to Evernote.

Aside from the obvious stuff (scanned paper, meeting notes, content clipped from the web), you're going to want to get *personal* with Evernote. Some ideas:

- Create a separate notebook called “Journal” and write something in it every day.
- Snap a photo of yourself (or your partner, kids, etc.) every day.
- Use Evernote to store the articles you read online (I love [Evernote Clearly](#) for this).
- Record meals, outings, and other personal activities.

Do these things (and things like these) for awhile and, without even really trying, you'll have a pretty cool personal timeline that will only become cooler the longer you do it.

CONCLUSION

Honestly, this is one of the few benefits reserved for those who use Evernote in a variety of contexts and situations, but I'll be honest — it's a lot of fun to randomly jump to a date in my Evernote account and just poke around.

Evernoting for Dumb Future You

As your affection for Evernote grows and you begin storing more and more data in your account, there exists a danger. Not like a shark or the IRS or whatever — more of a *concern*.

The concern I'm referring to is, of course, not being able to find the thing you added to your account like a year ago and really, *really* need. Like, right now.

To help mitigate this issue, I've come up with an approach to organization within Evernote. I like to call it "Organizing For Dumb Future You."

The basic idea is this: when you add something to Evernote that you absolutely expect to need at some point in the future, try to imagine the circumstance in which you'll need it and which words you're likely to use when trying to find it.

Think I have a mediocre example? Of course I do!

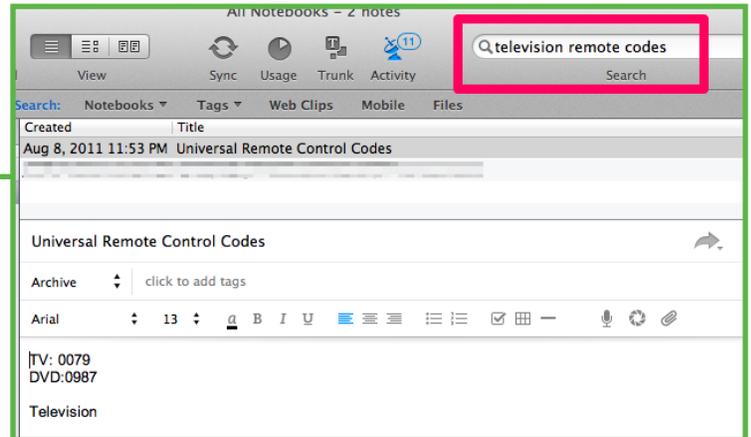
We have a television in our house. I'm fairly convinced that the dirt holding up our house is newer than this television. It's laughably old. Naturally, the remote control that came in the box with the television is miles deep in a landfill somewhere and we've been relegated to the dark, hopeless world of Universal Television Remote Control units.

These remote controls can ostensibly work with any modern-ish television. You just crack open the 300-page manual that came with the remote and find the little code that matches your

television, plug that code into the remote and you're off to the races.

Well, we have two small children and the remote manual was gone in very short order. Luckily, a buddy of mine happened to remember the code for both the TV and the DVD player. I put them into Evernote:

You might notice the word "television" at the bottom of the note body. That isn't there by accident. No, that was added because, after searching for "remote codes" and sifting through tons and tons of results (that phrase matches *many* computer programming-related notes in my account), I added the word "television" because I wanted to increase the likelihood of my finding the remote control codes quickly (if you've never encountered a couple of young kids right at the beginning of TV hour, you'll understand that not being able to turn it on can become a sticky situation *pretty* quick).



THE POINT

The point is this: your state of mind when adding something to Evernote can be quite different from your state of mind when you need to find that thing. It's not hard to imagine the possible circumstances in which you'll want to locate a specific note; be ready, my friends.

Be ready.

CONCLUSION

First of all, allow me to say thanks. By purchasing this guide, you've helped put food on my table and clothes on my family's collective back. I truly appreciate it.

While I hope you've enjoyed our wild ride through the land of

Evernote, my greatest desire is that this guide has helped you realize a couple of things:

1. How stinking awesome Evernote is
2. Some cool ways you (yes, *you*) can use it in your own life

Now, my friends, I send you out into the world armed with a working knowledge of one of the world's coolest pieces of productivity software. And don't forget the immortal words of Peter Parker's Uncle Ben:

"With great power comes great responsibility."

(Ok, that doesn't even make sense, but it sure sounds good, right?)

Acknowledgements

It may surprise you to learn that this document was not produced in a vacuum. Granted, I did most of the typing, but I can honestly say that, without the following people, this thing would have never seen the light of day.

It's hard to overstate the generosity of Mr. [Chris Guillebeau](#) who has spent untold hours answering my questions, giving me advice — all while being one of the most genuinely nice guys I've known.

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I'm extremely fortunate to belong to the very fine LifeRemix blog network, which is comprised of the who's-who of life improvement writers and bloggers. Having that group of people available for questions and advice has been invaluable and I can only hope to be a quarter the writer these folks are.

To my good friends and dueling *consiglieri*, [Andrew Carroll](#) and [Robert Bruce](#), I owe immeasurable gratitude for many long meetings, phone calls, and their invaluable advice.

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Acknowledgements

Thanks to my large friend Michael Todd for sharing the inspirational story of a young boy who mistook the cumin for the cinnamon at breakfast; it changed my life forever.

My two little cheerleaders, my son and daughter, who, despite having precious little idea what I was doing when writing this, still encouraged me to do my best and were always sure to ask how my book was coming along.

My patient and long-suffering wife, Joana; not only did she pick up some serious family slack during my periods of absence while writing this, she also made it very clear that she would accept nothing less than my best work.

And thanks to you, the reader, for ponying up the cheddar to buy this thing. I hope it will make a difference for you.

Disclosure

I was hired by Evernote in May of 2010. Unless something has majorly changed, I'll probably still be working there when you read this. Know that, while Evernote has been extremely generous in promoting it, this guide is not an official Evernote product and should not be construed as having any sort of endorsement by Evernote Corporation. For the purposes of this work, I'm just a regular slob who knows a good bit about Evernote.

In other words, any and all responsibility for this work (good or bad) rests squarely with me.

About the Author

(Seems a little silly to be introducing myself to you now after all the quality time we've had...)

My name is Brett Kelly. That's me up there (looking a little bleary-eyed, for some reason). I'm a software developer, writer, and tattoo collector from Southern California. I work for Evernote and I'm married to a lovely red-haired girl and together we have two awesome kids.

When I'm not dropping mad knowledge about Evernote, I enjoy whiskey, Apple products, good books, and irresponsibly late night conversations.

If you want to get in touch with me, I can be found bumming around on [Twitter](#), or you can visit my Internet weblog at nerdgap.com. Thanks again for reading.

