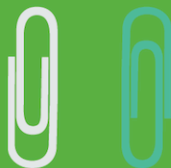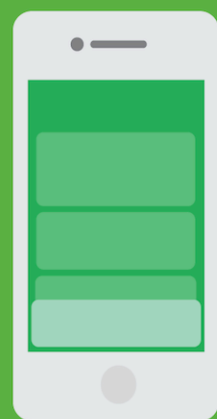# EVERNOTE ESSENTIALS

Brett Kelly

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 nicely-appointed sedan. 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 almost ten years and have over 15,000 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 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 Ninjas.[1] 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 for phones and tablets, 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,

notebooks and stacks. This term is interchangeable 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.
- **Evernote Business**: A version of Evernote designed for businesses; it provides more sophisticated sharing capabilities, user administration, and other collaboration-focused features suitable for use in a business scenario.
- **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.
- **Shortcuts**: A collection of selected notes, notebooks and tags that are readily accessible in most[2] 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 couple of clicks.

- **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).
- **Context**: A relatively new feature exclusive to Evernote Premium and Evernote Business that will suggest content related to whatever you're currently typing into Evernote from various news publications and, optionally, your own Evernote account.
- **URL**: An Internet acronym which stands for "Uniform Resource Locator." It's just a fancy name for a website address, like https://brettkelly.org (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).

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

Evernote employs roughly 40 billion[3] 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. Many 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.

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

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

3 Hyperbole is the spice of life, folks.

A Note on Pricing

When I first wrote this guide in 2010, Evernote offered two pricing tiers: Free and Premium. Free got you the basics and worked well for most folks. Premium would set you back a few dollars per month and got you extra features like more data upload per month, note versioning, offline access to your data on mobile devices, and other stuff.

In early 2015, Evernote introduced another pricing tier called Plus (and quietly renamed Free to "Evernote Basic"). If Evernote Basic is a unicycle and Evernote Premium is a Tour de France road bike, then Plus is something like a mountain bike or nicely-appointed beach cruiser: some extra bells and whistles —many of which used to be part of Evernote Premium—at a reasonable price, but not the whole shebang. Evernote Premium, most notably, got unlimited monthly uploads and an increased maximum note size.

I've been a Premium subscriber since roughly forever and it's money I'm happy to spend given how much I use Evernote, but if you're not quite ready to take that plunge, Plus is a nice upgrade for a reasonable price, in my opinion.

As I describe the various Evernote features in this guide, I'll be careful to point out anything that's reserved for either Plus or Premium (though, Premium includes everything offered by Plus).

Anyway, if you want to check out an exhaustive comparison of the features available to the different pricing tiers, visit [this Evernote Knowledge Base article](). Then just pop on back over here when you're done. And, while I will be discussing Evernote Business—mostly in the chapter devoted exclusively to it— the primary focus of this guide is on the non-Business versions. As you view the feature matrix and see a bunch of empty checkboxes under the Premium

heading, those all deal with Evernote Business and you probably don't need to worry about them too much.

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:

Evernote Essentials   tag1   tag2   tag3   the batman symbol

Helvetica Neue   14   B I U a
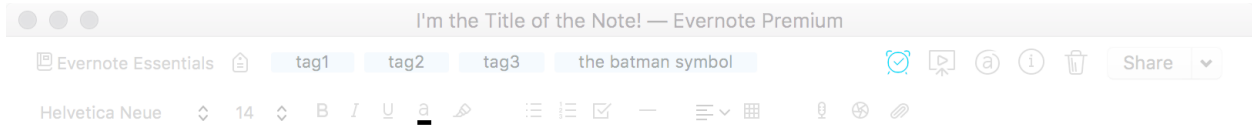
I'm the Title of the Note!

This is the body of a note. You can have text like this,

Big text like this.

Perhaps something in a dark blue with **bold,** *italics* and ~~strikethrough~~.
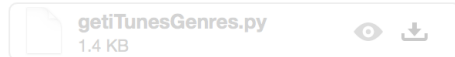
You might like to maintain a list of tasks:

☐ Buy the farm
☐ Drink 3 raw eggs like Rocky
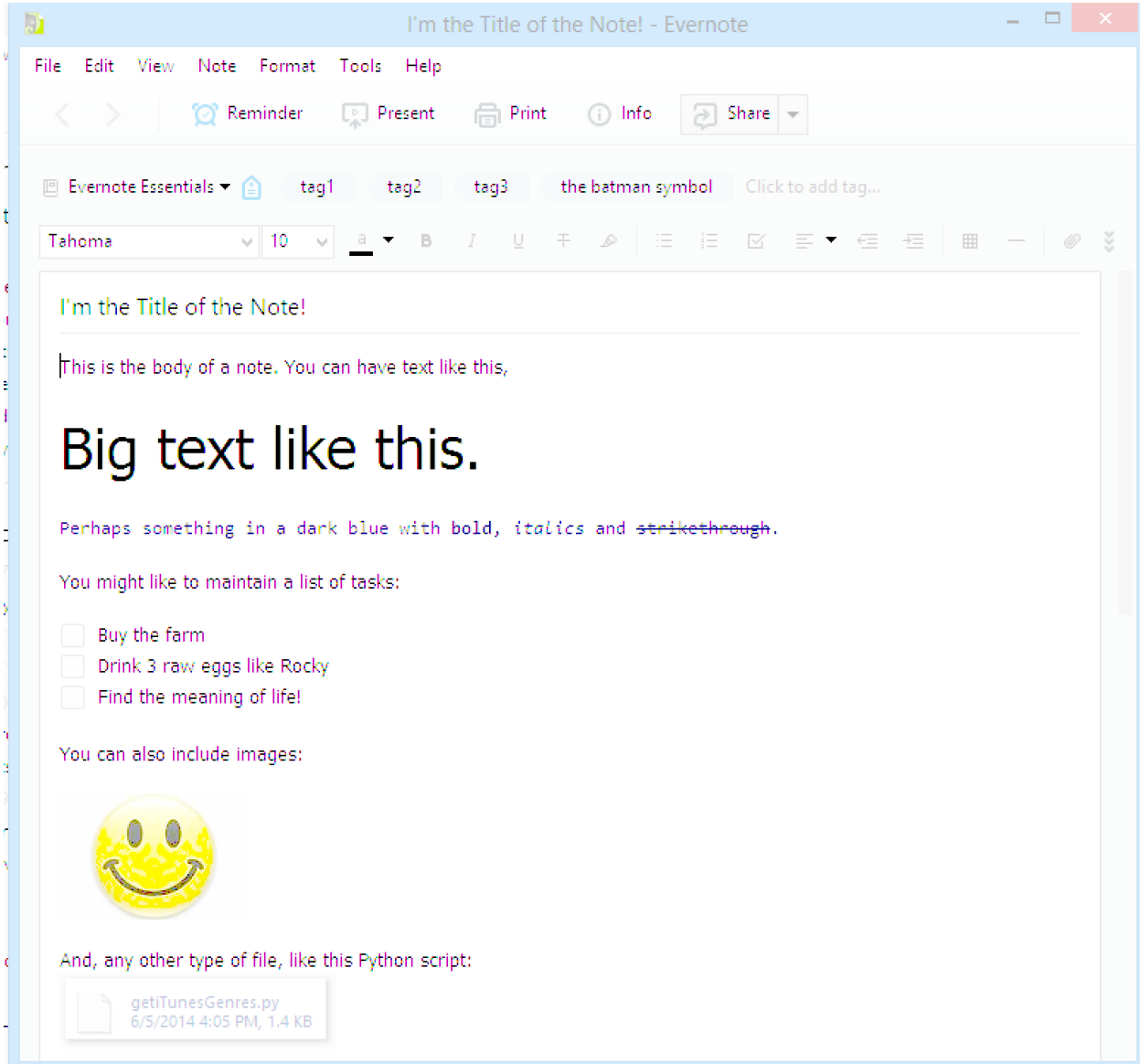☐ Find the meaning of life!

You can also include images:

And, any other type of file, like this Python script:

getiTunesGenres.py
1.4 KB

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 rectangles at the top of the window on the Mac, the light blue 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 encircled "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.

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).

Speaking of images, Evernote for Windows and Mac both offer built-in image annotation functionality. Long-time Evernote fanboys and girls may recognize these features from Skitch, another app by Evernote.[1] If you hover over an image in Evernote for Windows, you'll see a fancy little "a" with a circular arrow around it:

This will launch the annotation editor window. You can do the same thing on the Mac by right-clicking an image and choosing "Annotate this Image" (or, if you prefer, you can leave the original image intact by choosing "Annotate a Copy

of this Image.") Either way, you'll be presented with a window that looks alarmingly like this:
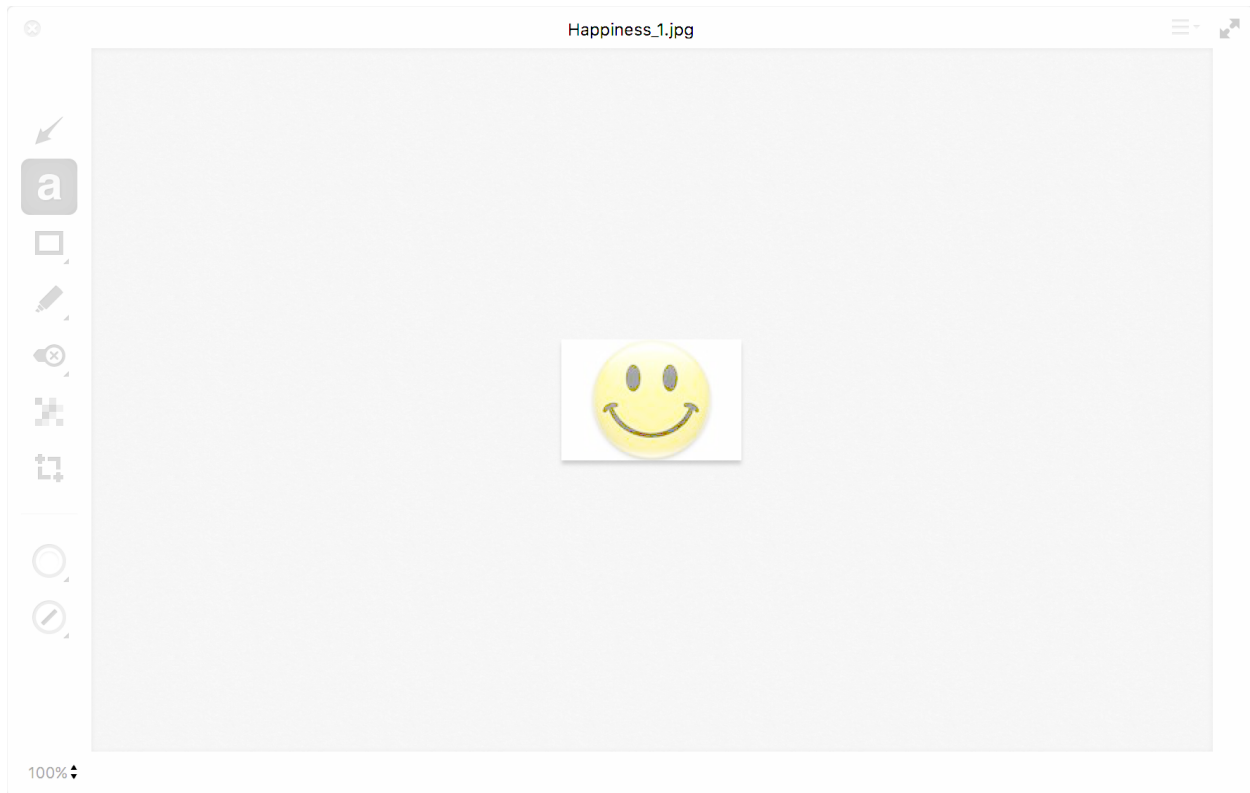
Skitch users will probably be thinking, "man, that looks a heck of a lot like Skitch!" You're right because that's pretty much exactly what it is. Skitch is rather simple to use, so a quick poking around should get you familiar with the tools and how they work.

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. Premium users are also able to search the contents of PDFs and Office-style documents (like Word and Excel files). The only limit is the size of the file(s) you add; adding too many files may cause a given note to exceed the maximum size for a note, which is determined by your account level.

Both note windows include a button that says "Info" with a little, encircled "i" icon. Clicking that guy will launch the note's Info panel.[2] Both versions of Evernote will display essentially the same set of information about a note when you open the Info panel. Here's Windows:

And here's the Mac version:

Title	I'm the Title of the Note!
Notebook	Evernote Essentials
Tags	tag1 tag2 tag3 the batman symbol
Created	February 12, 2010 12:30 PM
Updated	November 3, 2012 8:14 AM
URL	http://google.com View Site
Location	Type an address to set a location
Sync Status	Synced 24 seconds ago
Attachment Status	All attachments have been indexed
Size	5.5 KB, 66 words, 337 characters
Author	click to set author
History	View History

Most of a note's metadata can be seen—and, in most cases, edited—in this view, and some of the fields are self-explanatory. Here's a quick overview of the less obvious ones, quick and dirty:

- **Location** may contain some representation of the location where the note was created (either latitude/longitude coordinates, a physical address). This field is optional. If Evernote is capable of (and allowed to)

geolocating your device when the note is created, this field will be populated automatically. You can fill it in manually, if you'd rather.

- **Author** can contain the name of the person who, well, authored the note. Evernote will populate this field automatically with your name on each note you create. If you're looking at a shared notebook which others have permission to edit, you might see one of their names. You get the idea.

- **Last edited by** will show you the email address of the person who made the most recent edit to the note. This field will not be visible if the note isn't shared (or part of a shared notebook).

- **Sync status** shows when the note was last synced with Evernote's web service. If has never synced, it will say so.

- **Attachment Status** describes whether some, all, or none of the attachments in the note have been indexed for search. We'll get more into this process later, if you have no idea what that means.

- **History**, when clicked, will launch a pop-up window and show you all of the versions of the note Evernote has available. You can choose to export any version you like and add it back into your account. Note that this feature requires Evernote Premium. More on this feature in later in this chapter.

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. The maximum length of an audio recording will depend on your maximum note size: 25mb for Basic, 50mb for Plus, and 200mb for Premium and Business.

Mac Extras

Evernote for Mac has a handful of extra functions that aren't[3] 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.

At the top of the window, you'll see a little encircled heart. Right below that, notice the round camera shutter icon:
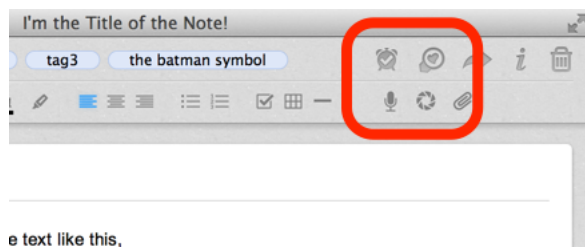
- The encircled "a" lets you annotate the current note in its entirety. This works just like the image annotation we spoke about a second ago, but in this case the entire note is converted to a PDF before being loaded into the annotation editor.
- The camera shutter will let you take a photo with your Mac's built-in camera[4] and insert it into the note body.

Note History

Premium users have the ability to view previous versions of a given note (provided it's been changed since it was created). 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 in a new notebook with the same name as the note. You'll also be asked whether you want the new notebook to be synchronized or not. We'll discuss exactly what this means in the next chapter, but you can safely answer "yes" when asked.

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). Plus users get 50mb per note and for Premium users, that limit goes up to 200mb 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.

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[1] At one point in time, Skitch was a separate app available on all major mobile and desktop platforms. As of early 2016, Evernote has discontinued Skitch everywhere but on the Mac since a good amount of Skitch's capabilities have been rolled into Evernote proper.

[2] Also, water is wet.

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

[4] 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.

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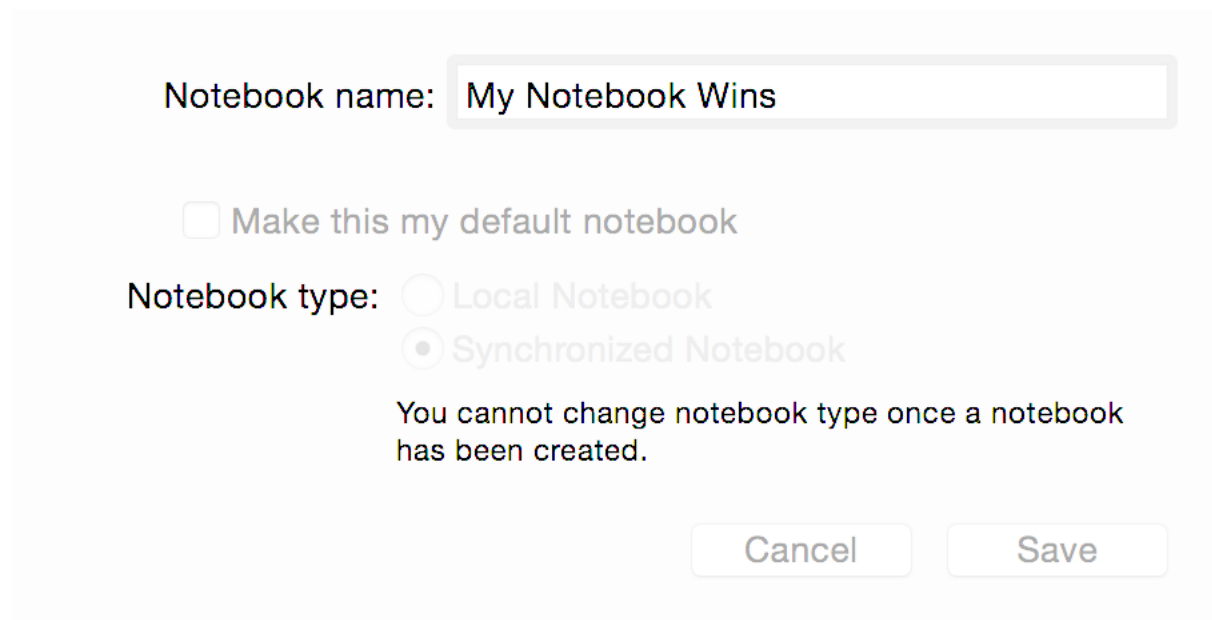
The good news is that you can create additional notebooks: up to 250 of them, in fact. This means that you can have a notebook for recipes, another one for sewing patterns, and yet another for all of your favorite database queries. Or, you know, something like that.

To create a new notebook on Windows or Mac, open the File menu, select "New Notebook," then the type of notebook you want to create (we'll cover what the two choices in a second; if you're following along at home, choose

"Synchronized Notebook"). You'll be prompted to give it a name then, presto, your notebook will be created.

What the heck is a "default notebook"?

If you right-click your new notebook and choose Notebook Settings, you'll see a dialog box that looks a lot like this (which is the Mac version, but the Windows dialog is visually similar and functionally identical):

Notebook name: My Notebook Wins

☐ Make this my default notebook

Notebook type: ○ Local Notebook
                  ● Synchronized Notebook

You cannot change notebook type once a notebook has been created.

Cancel   Save

The only thing we've covered so far is the notebook name. So what's the story with this "Make this my default notebook" option?

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?

As you probably noticed when we created our first notebook a minute ago, 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 the Evernote service and, in turn, synchronized to all of your other Evernote-enabled devices (tablets, smart phones, other computers) as well as Evernote Web. 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.
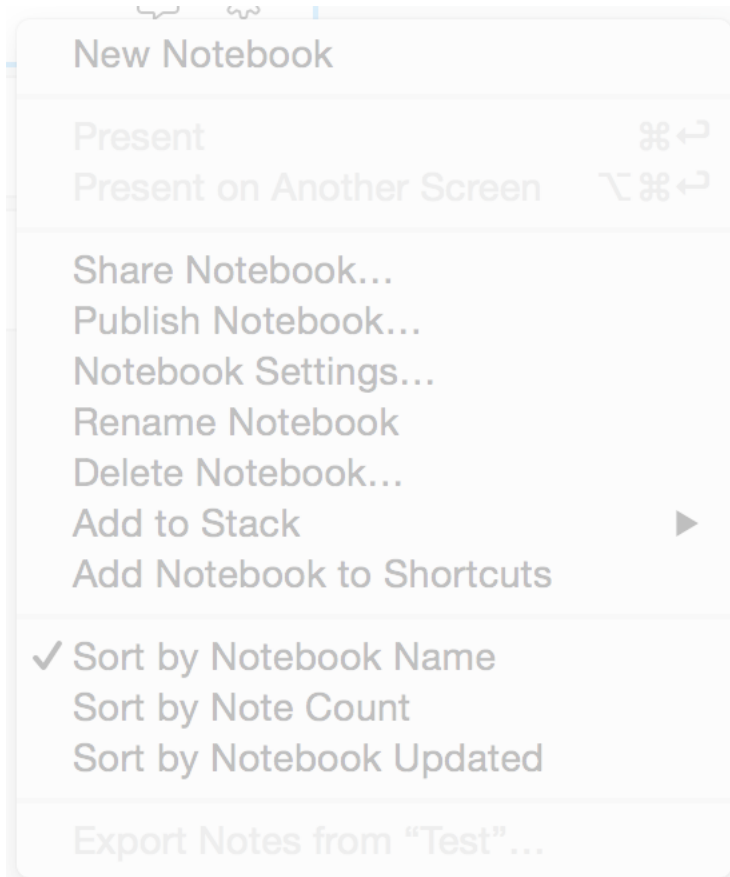
Notebook Odds and Ends

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:
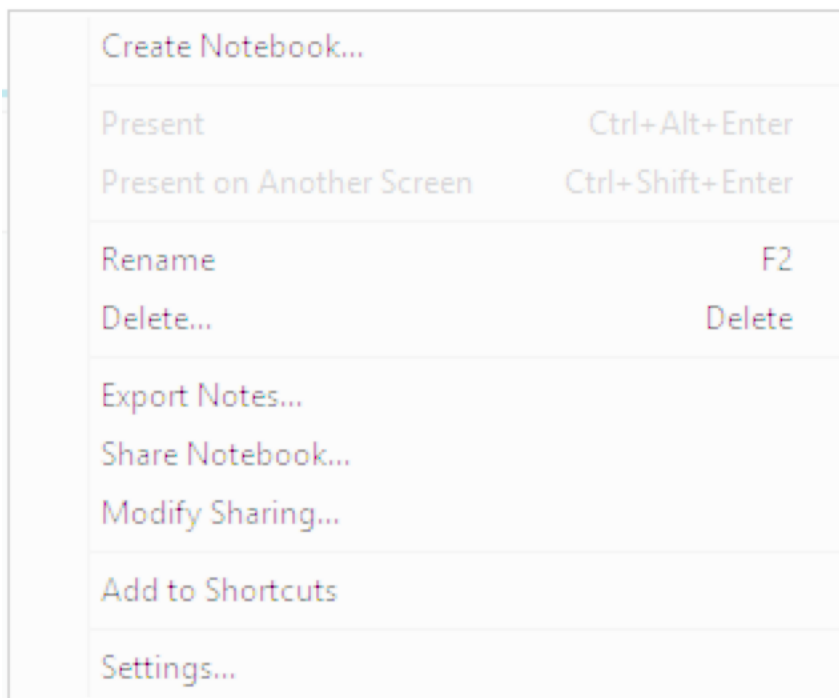
Let's quickly go over what each of these does:

- Create Notebook — Just like it says on the tin, this option creates a new notebook.
- Present — This option will launch Evernote's Presentation Mode (covered a little later) and display all of the notes in the notebook in whatever order you currently have configured.
- Present on Another Screen — If you have multiple displays attached to your PC or Mac, this option will allow you to choose which display to show the contents of this notebook in Presentation Mode.[1]
- Rename — Change the Notebook's name. I'll let that sink in for a sec.
- Delete — Take a wild guess.
- Export Notes — 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.
- Modify Sharing — 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.
- Add to Shortcuts — Adds the current notebook to your Evernote Shortcuts, which we'll discuss a couple of chapters from now.
- Settings — Launches the Settings dialog where you can change the notebook name and optionally set it as your default notebook.

The above options are available on the Mac as well, though the menu looks a little different (and contains a couple of additional items)

New Notebook

Present ⌘↩
Present on Another Screen ⌥⌘↩

Share Notebook…
Publish Notebook…
Notebook Settings…
Rename Notebook
Delete Notebook…
Add to Stack ▶
Add Notebook to Shortcuts

✓ Sort by Notebook Name
Sort by Note Count
Sort by Notebook Updated

Export Notes from "Test"…

For the sake of completeness, let's chat about each of the options not available in the Windows menu:
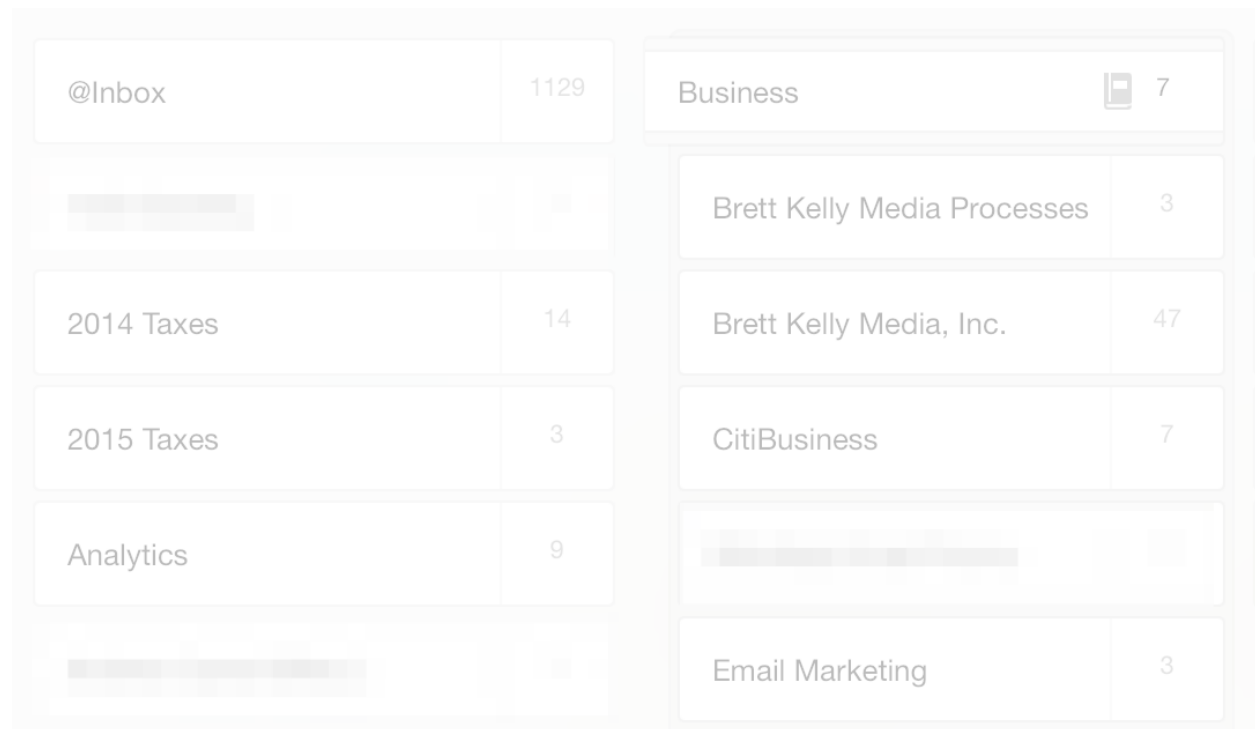
- Publish Notebook — This option allows you to make the entire notebook available to the whole world (in read-only mode). More on this later.
- Add to Stack — We're going to talk about stacks in roughly 20 seconds. For now, know that this option adds the clicked-upon notebook to a notebook stack.
- Sort 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).

You have two options to view a complete list your notebooks and, as it

happens, both options are available via the sidebar of the main Evernote window.

By default, the notebook list is collapsed on the right-hand side of the main Evernote window. On the Mac, right-click it and choose "Show Notebook List" to reveal a list of all of your notebooks. Under Windows, click the little arrow next to notebooks to expand or collapse the list.

On the Mac, right-clicking a notebook in the sidebar list gives you an abbreviated version of the menu we saw a second ago. Evernote for Windows gives you exactly the same menu. On both versions, clicking "Notebooks" will show you all of your notebooks arranged in a handsome list (it's more of a grid on the Mac, actually). Here's what the grid looks like:[2]

| @Inbox | 1129 | Business | 7 |
		Brett Kelly Media Processes	3
2014 Taxes	14	Brett Kelly Media, Inc.	47
2015 Taxes	3	CitiBusiness	7
Analytics	9		
		Email Marketing	3

Under Windows, it's a vertical list:

27

Let's chat about this notebook view for a second. Functionally, it behaves roughly the same under both Windows and Mac.

- To create a new notebook, click "New Notebook" at the top left of the list (or under the File menu, as we discussed earlier).
- To share a notebook, hover over it and choose either "Share" (Windows) or click the "arrow in a box" icon nestled within the notebook's icon in the grid (Mac). Again, we'll cover sharing in more detail a bit later.
- To change the name of a notebook, right-click and choose the appropriate option.

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:
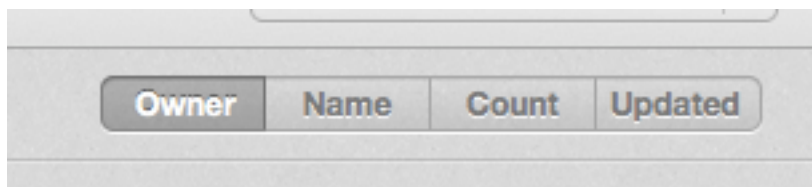

- Owner sorts the notebooks by who owns them. Essentially, notebooks

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.

Windows provides all of the same options (with the exception of "Updated"):
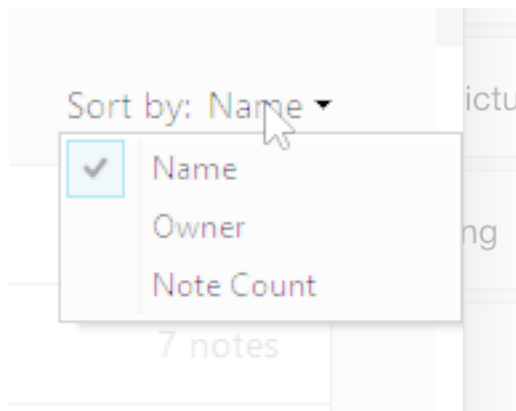

Notebook Stacks

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":

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:
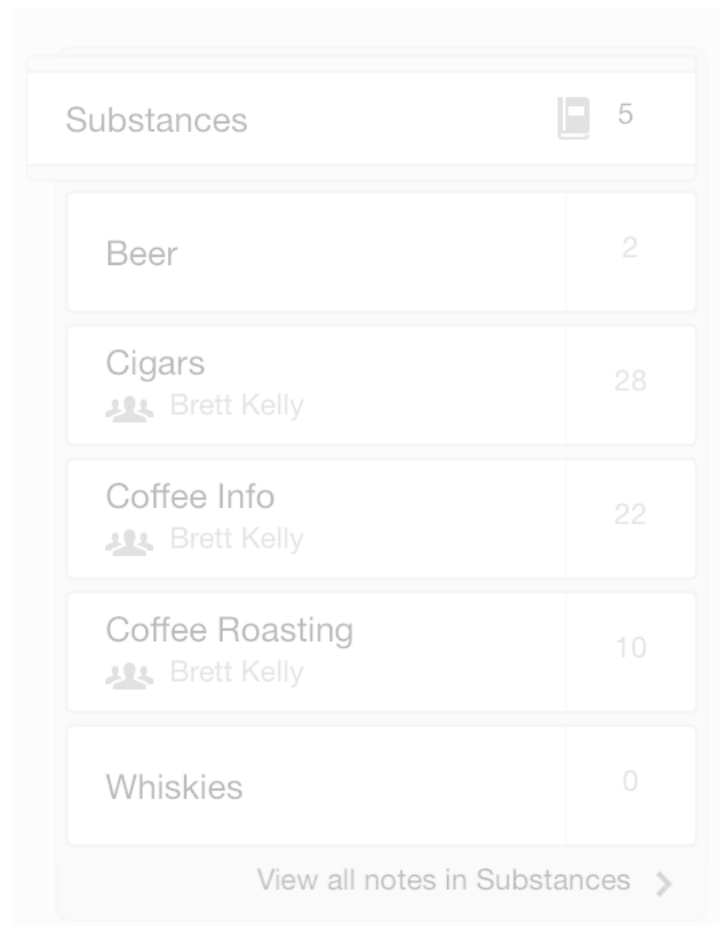
And here's the same stack under Windows:

Substances		
Beer		2 notes
Cigars	👥 Brett Kelly	28 notes
Coffee Info		22 notes
Coffee Roasting	👥 Brett Kelly	10 notes
Whiskies		

In this image, we have a stack called "Substances" which contains a few notebooks including "Coffee Info" and "Coffee Roasting."

You can create a notebook stack in one of two ways: either drag one notebook onto another notebook (the second notebook must not already belong to a stack) or 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. This one only works on the Mac.

If you want to move a notebook out of a notebook stack on either platform, right-click the notebook and choose "Remove from Stack." You can also drag notebooks directly between stacks if that's your cup of tea.

A few other things to note about stacks:

First, they can't contain notes; only notebooks. Second, they can't be shared (though the notebooks that live inside them can be shared individually). Finally, 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.[3]

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. Anybody who started using Evernote in the last couple of years will never know the struggle of a stack-free existence.

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 said 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?

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[1] If you're curious, these options are grayed out in the screenshot because I'm using a demo Free account while composing this section and Presentation Mode is a Premium-only feature. No funny stuff.

[2] And yes, I've redacted several notebook names in this list. Super unprofessional, I know.

[3] Well, this is *mostly* true. The only real smarts associated with stacks is the ability to search within a specific stack using the "stack:" search operator, which we'll discuss in a little bit.

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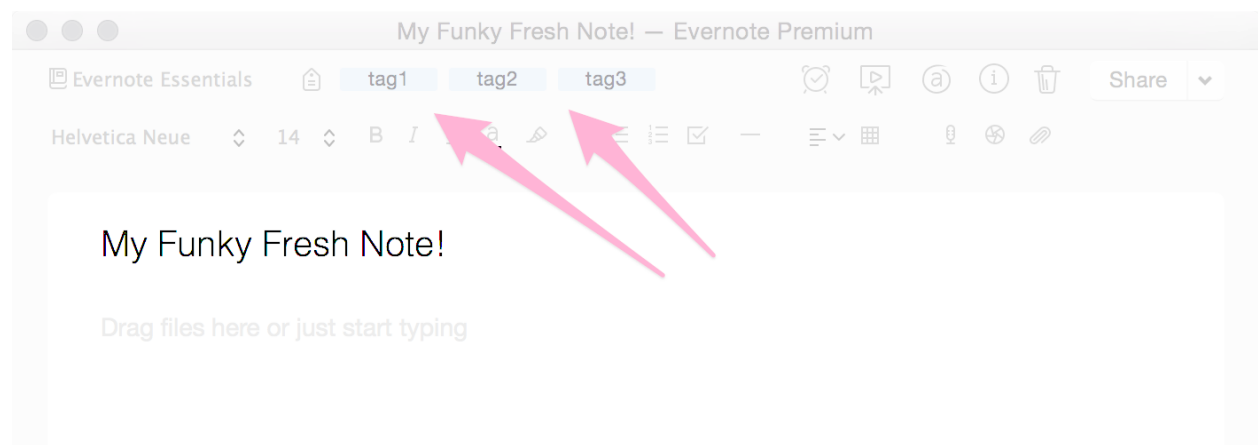
Tags give us the ability to group our information in ways that go beyond the notebook concept.

For example,

I have a son and a daughter that I'm pretty fond of. As I write this, they're

eight and ten years old, respectively. When they were a bit younger, both were rather prolific artists. I kid you not; hardly a week went by when I didn't have one or more hand-drawn pictures delivered proudly to my desk. It was awesome.

And, as any dutiful Evernote-lubbing parent would, I scanned them into Evernote (assuming they're not coated in glitter and elbow pasta). From there, each drawing was 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 still awesome.

But what's really great 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 he needed 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 can be 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.

How I Tag Now

(This is a quick aside written by 2016 Brett. The above paragraphs were written largely by 2010-ish Brett and I still stand by them, but I wanted to give an update on my own tagging practices as of today…)

These days, I hardly tag anything at all. I still tag my notes occasionally, but by and large I rely on notebooks instead of tags for organization and search to locate what I need.

For me, tagging became too cumbersome and added what ended up being unnecessary complexity (not to mention time needlessly spent), so I stopped temporarily awhile back, just as an experiment, and I discovered that I didn't miss it.

Don't misunderstand me, please — I'm not saying tagging is bad. Not at all. I'm just saying that my personal preference is to rely more on a notebook-based organizational structure than one which relies on tags. That's it.

Speaking of, we're going to discuss in some detail the pros and cons of using tags versus notebooks to organize your Evernote account. This is a question I've received a lot over the years and I'm finally ready to address it as impartially as I can.

Now back to your regularly scheduled program!

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" into a search box—despite a deep and abiding affection for Mongolia and its inhabitants—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.). Unfortunately, Evernote has obscured saved searches a bit in recent revisions of the various apps, so it's not as easy to create a saved search as it once was. Let's quickly chat about how to do it on each of the major platforms where Evernote runs…

- After you issue a search on the Mac, click Edit > Find > Save Search.[1]
- Under Windows, place your cursor in the search field and begin typing. You'll notice a "Save Search" button at the bottom of the menu that appears below the search field. Once you've finished typing your search terms, click that button.
- On iOS, after you issue a search, you'll see a small "magnifying glass with a plus symbol next to it" button at the top right of the screen. Tap that to save the current search with a custom name.

- When you place your cursor in the search field on Evernote Web, a menu will appear below the search box. This menu will contain recent searches as well as any saved searches you've defined. At the top of this list you'll see "Save this search…"[2]

You might notice our pal Android is missing from the above list. Not by accident, I'm afraid.

While Android can run saved searches created on other devices, it's not possible to create a saved search in Evernote for Android. You do get a consolation prize, however: if you execute a search on Evernote for Android, then tap the vertical-ellipsis button, you have an option to add a shortcut to that search to your device's home screen. But, again, that search is not synced to Evernote and is only available on the device used to create it.

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. If you find yourself creating dozens of them, it might be worth spending some time developing a convention for how they're named. Either way, 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, stacks, and tags. If you create a saved search on your Windows computer and then 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.

In a previous life, I was a big fan of cigars. I'm sure it won't surprise you to learn that I used Evernote to record the various cigars I've had over the years. Text search in images comes in very handy here:
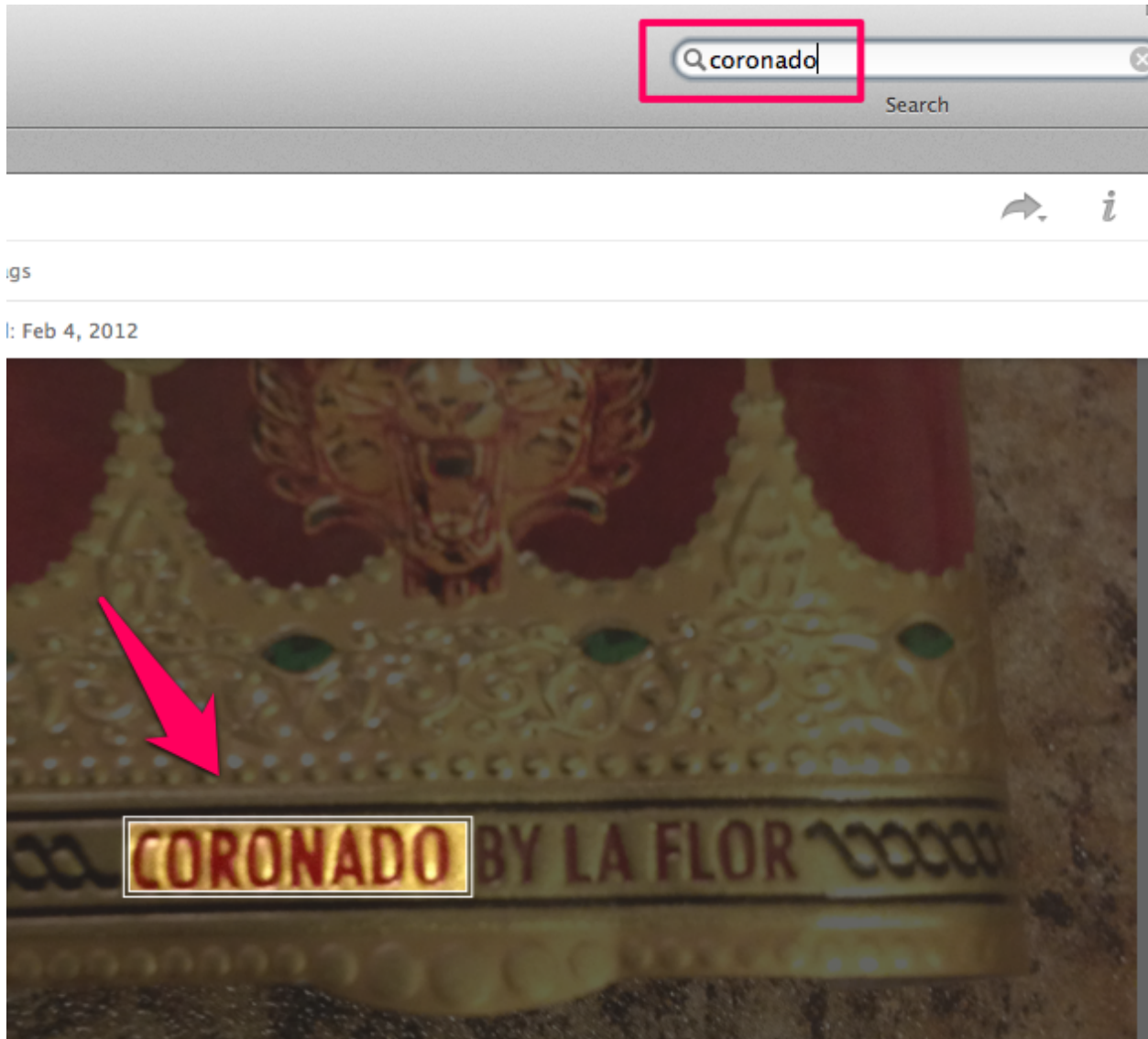
Whenever you add an image to a note in Evernote (and the note lives in a synchronized notebook), the image is sent through Evernote's own Optical Character Recognition (OCR) system. It looks for words and characters within the images and adds whatever it finds to the note's metadata, allowing it to be found using Evernote search. It's *also* really spiffy.

(Danger, Will Robinson: slightly nerdy aside coming up)

I'm routinely asked if Evernote can create a textual representation of a PDF

or image based on the OCR results. The answer is no, and I'll tell you why…

In a nut, Evernote will scour an image for anything that looks like text, then take a series of guesses as to what the text says. Each of these guesses is assigned a weight; the higher the weight, the more confident Evernote is that that particular guess is the text in the image. In other words, for every word found in an image, Evernote will store several candidate matches for that word.

How about an example? If I search my account for the word "Stella," one of the resulting notes will contain this photo of a bottle of Stella Artois:

If we export the note as an ENEX file—more on this later—we can look at all of the words Evernote thinks "Stella" in that picture might be:

```
<!DOCTYPE recoIndex SYSTEM "http://xml.evernote.com/pub,
<recoIndex docType="handwritten" objType="image" objID='
objHeight="2048"><item x="813" y="73" w="20" h="13"><t
t></item><item x="475" y="885" w="613" h="158">
        <t w="100">STELLA</t>
        <t w="53">SHELLA</t>
        <t w="46">STELLY</t>
        <t w="42">SHELIA</t>
        <t w="31">steels</t>
      <t w="31">steely</t><t w="31">Steele</t><t w="29
t><t w="15">Steell</t><t w="15">atelia</t><t w="15">Otel
t><t w="34">Aarons</t><t w="31">ARDORS</t><t w="28">\RT0
w="26">\RT0I*</t><t w="24">PROOFS</t><t w="23">ARGOTS</t
w="19">488015</t><t w="16">patois</t><t w="15">parols</t
t><t w="30">NANAIMO</t><t w="24">prisoners</t><t w="22"
t><t w="19">ENCISO</t><t w="19">ENTIRE</t><t w="17">val
```

The weight of each result is described by the 'w' and, as you can see, Evernote's pretty sure that word is "Stella," but it could also be "Shelly," "Stelly," "Sheila," or one of several dozen other possibilities.

If you want to know a lot more about how the OCR process works, you can read this post—which I actually wrote back when I worked at Evernote—on the Evernote Tech Blog; the post explains it all in painful detail.

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.
- Evernote Premium users can also search the contents of Office documents. The search is limited to Microsoft Office documents—specifically those created with Word, Excel, and Powerpoint—and Apple's productivity trio: Pages, Numbers, and Keynote.

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

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[1] There's no keyboard shortcut set for this menu item by default, but you can set one using Keyboard > Shortcuts in the OS X System Preferences application.

[2] At the time of this writing, Evernote has a new version of evernote.com in beta that looks *very* different from the stable version. Among the many changes in the new beta, there is currently no way to create saved searches.

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: 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 Plus or Premium user, 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. Be aware, though: if you tell Evernote to save all of your stuff locally on a mobile device, you may end up using more storage than you might want.

Background Sync

A quick aside regarding background syncing on mobile (i.e., Evernote

syncing while the app isn't active)…

As modern mobile operating systems have become more sophisticated (and battery performance has improved), it's only natural that Evernote users would begin to find it a touch annoying that they must manually launch the app in order for it to sync.

That said…

For iOS users, I'm afraid there isn't much in the way of configuration for background sync. Launch the Settings app and browse to General > Background App Refresh and, aside from the topmost toggle that enables or disables background refresh for all applications, a list of applications who are allowed (or disallowed) to sync in the background. Evernote will appear in this list, but all you can do is enable or disable the option.

In my experience, this feature works *okay*. It's not terribly reliable and, for whatever reason, many times my account is out of sync when I launch the Evernote app. Hardly a deal-breaker, but let's just say I wouldn't rely to heavily on this feature working correctly 100% of the time.

Android folks: your situation is similar. If you browse to the Settings in Evernote for Android and choose Sync, you'll find a checkbox:

Check that box, and your notes will sync in the background. Uncheck it, and they won't. I'm afraid that's as granular as the control gets.

Enabling this setting in either case brings with it a couple of concerns: battery life and, assuming you're allowing Evernote to sync using your cellular data connection, data usage. For the former, I'd just say keep an eye on it. I've had Evernote background syncing turned on for years and I've never seen what I would consider to be abnormally high battery usage. You might have a different experience and, if so, consider disabling background sync.

As for the data usage question, both apps can be configured to only sync using WiFi. On Android, it's in the same menu we just looked at. On iOS, it's in the Evernote app's Settings under Sync. If you're concerned about blowing through your monthly cellular data allotment, consider only syncing over WiFi.

(Note: since I'm an iPhone user, I can't speak to the reliability of background syncing, or its effects on battery life, on Android devices. A thousand pardons!)

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 many 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).

Sharing Notes, Notebooks, and Feelings

Real talk: I had a hard time deciding where to put this chapter among the others. Sharing is a large part of what makes Evernote useful, but trotting it out at this point feels a little premature since we've barely discussed the basic building blocks of Evernote. The problem is that, with the advent of Work Chat —Evernote's primary means of sharing content with others—sharing is a lot more prominent within the various applications' interfaces. Put more simply, we're going to be seeing Work Chat icons and functionality a lot in the next couple of chapters, so instead of repeatedly saying "we'll be covering sharing and Work Chat later," I decided to cover them here and now. We already know what notes and notebooks are, so there isn't a good reason why we can't go over sharing now. Good thing, too — because that's exactly what we're going to do.

Look out wind, because here comes the caution.

A Brief History

(This will be quick, I promise.)

Back in its infancy, Evernote's sharing capabilities could be encapsulated in three bullet points:

1. Users could share individual notes one way: with the world. If I chose to share a single note, Evernote would generate a unique URL for the note

that I could then give to whomever I wanted to see the note. The rub was this: the URL was public; the viewer didn't need to be logged in or anything to see the linked note. If somebody knew the URL of the note, they could see it.[1]

2.   Whole notebooks could be shared with individuals. The recipients needed to be logged in to see the notebook and it would be synced to their account. The sharing party could determine what permissions the recipients had (view only, edit, or invite others to view or edit the shared notebook) and the control was fairly granular.

3.   Notebooks could be published to the world. This meant that a user could create what Evernote calls a "public link" to a given notebook and the contents of said notebook would be visible to anybody who knew the URL.

The last two items remain largely unchanged in today's Evernote. Bullets 1 and 2 are now housed in a relatively new feature called Work Chat.
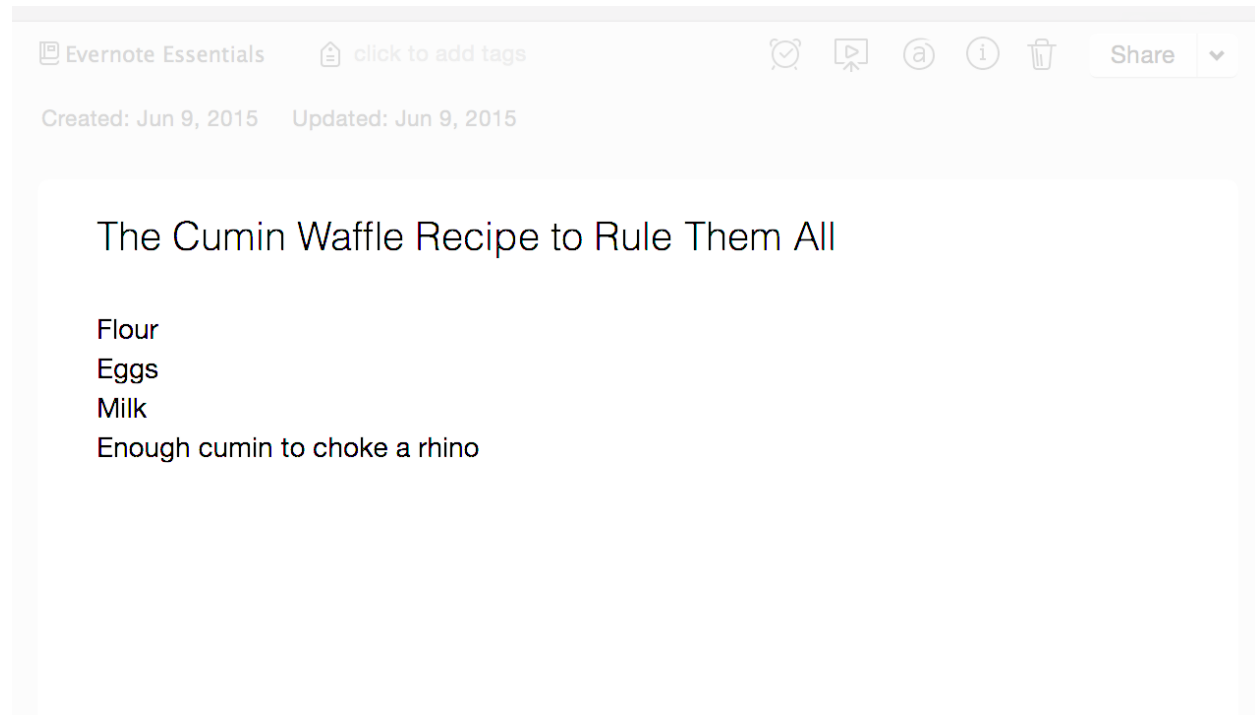
Work Chat

Work Chat was developed to streamline sharing in Evernote as well as solve a specific problem: people would share content from their Evernote accounts, but collaboration around this content often required discussion outside of Evernote. This usually meant an email conversation or some other separate communication. Evernote saw fit to develop a simple communication platform along side it's own sharing functionality. Thus, Work Chat was born.

Whenever you share a note or notebook with specific people (as opposed to the whole world), you're doing so via Work Chat. Let's see how it works…

Say, for instance, I want to share a note with my made-up pal Carl. The note

contains a cumin waffle recipe I've been kicking around and he's a renowned chef whose opinion I respect. If I'm looking at the note in Evernote on my Mac, I click the arrow next to the Share option at the top right…
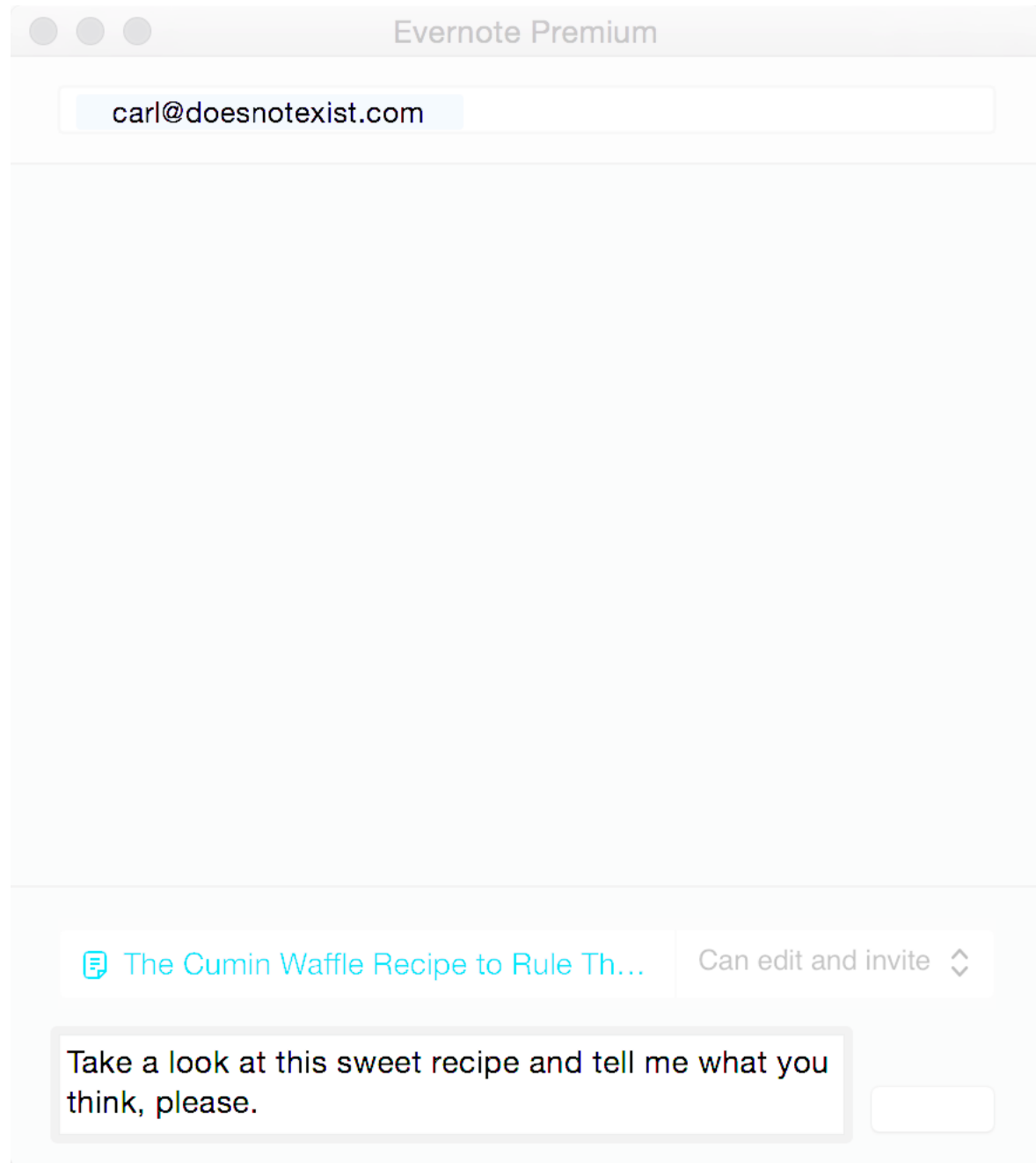

…we get this handsome list of options…
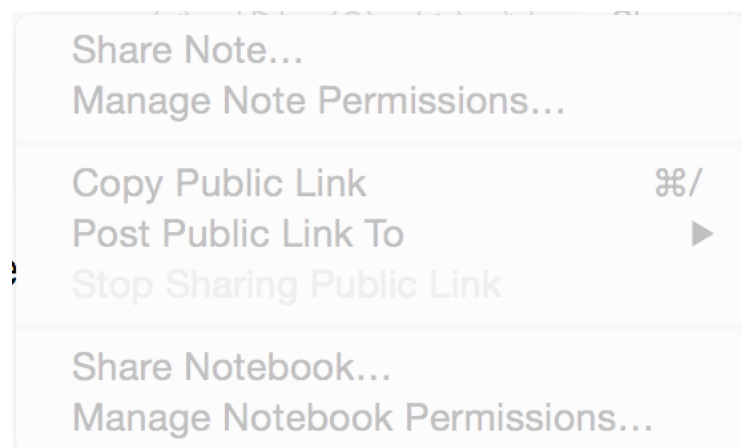
Since I want to share this note with Carl, I'm going to click the first option, "Share Note." This will pop up a Work Chat window that looks similar to most

desktop chat software. After I fill in Carl's fake email address and add a brief message explaining what I'm after, the window will look like this:

If you're a Mac user who also uses the built-in Contacts application—and you give Evernote permission to access your Contacts when prompted— Evernote will query your contact list as you fill in the recipient list at the top of

the Window. If you're a Windows user who also uses Microsoft Outlook, you can give Evernote permission to access your Outlook contacts (we'll see where to do this when we cover the application preferences in the next chapter). Gmail users can also give Evernote access to their contacts which provides similar auto-completion convenience.

Notice the name of our cumin waffle recipe note near the bottom of the window. Just to the right is a little drop-down menu where I can decide what kind of permission Carl has with respect to this note. As it happens, these are the same permissions we can give to users with whom we share notebooks, as well:

- **Can edit and invite** will allow Carl to not only edit the note, but invite other people to view (and potentially edit) the note being shared.
- **Edit only** lets Carl edit the note, but not invite others.
- **View only** only lets Carl look at the note, nothing more.

Since Carl is a stand-up guy and I trust him, I'm going to go ahead and give him the **Can edit and invite** permission. As you'll see in a second, I can always change this permission later if Carl decides to play fast and loose with my awesome recipe.

Now, Carl and I can exchange comments about my recipe (or the weather or anything else) via the Work Chat section of Evernote's main window (located at the top of the part on the left).

Let's say I want to invite my other friend Nina to chime in on our conversation regarding my sweet recipe. Well, unfortunately, we can't. At least, not without going through the whole sharing process we just went through with Carl. That's right: we've encountered one of a handful of limitations of Work Chat.

For efficiency's sake, I'll mention them both now:

- Once you've shared a note or notebook using Work Chat, **you can't add or remove participants**. So, using the above example, the only people who will ever be able to see my conversation with Carl are Carl and me. If I want to add Nina, I'll need to share the note again and invite both of them to the Work Chat.
- It's also **not possible to stop sharing notes or notebooks from within a Work Chat window**. In order to disallow Work Chat participants from viewing shared notes or notebooks, we need to change their permission level using the Manage Note (or Notebook) Permissions menu item under the Share menu (which we'll cover in a second).

One thing we *can* do quite easily is add new notes or notebooks to an existing Work Chat instance. The easiest way to do it is to open the Work Chat in a new window by double-clicking it, then drag whatever note or notebook you want to share into the Work Chat window:
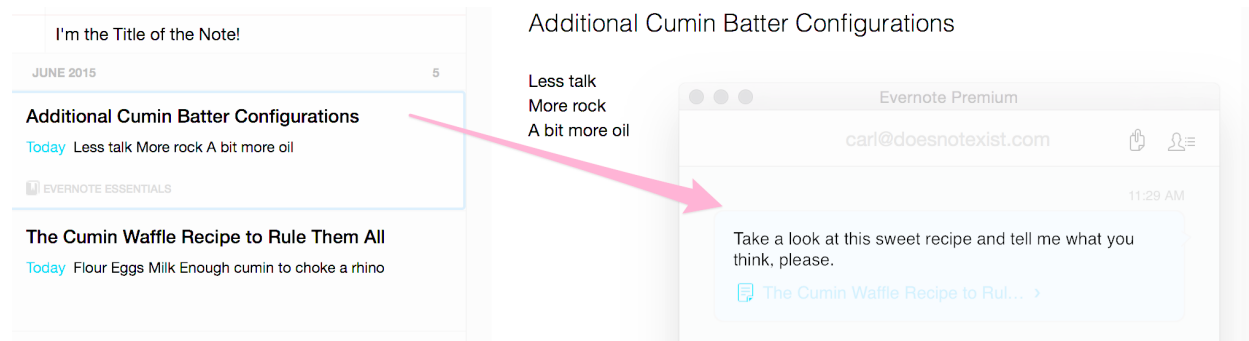
Once you drop the item into the chat window, you'll have a chance to adjust the permissions before sending it:
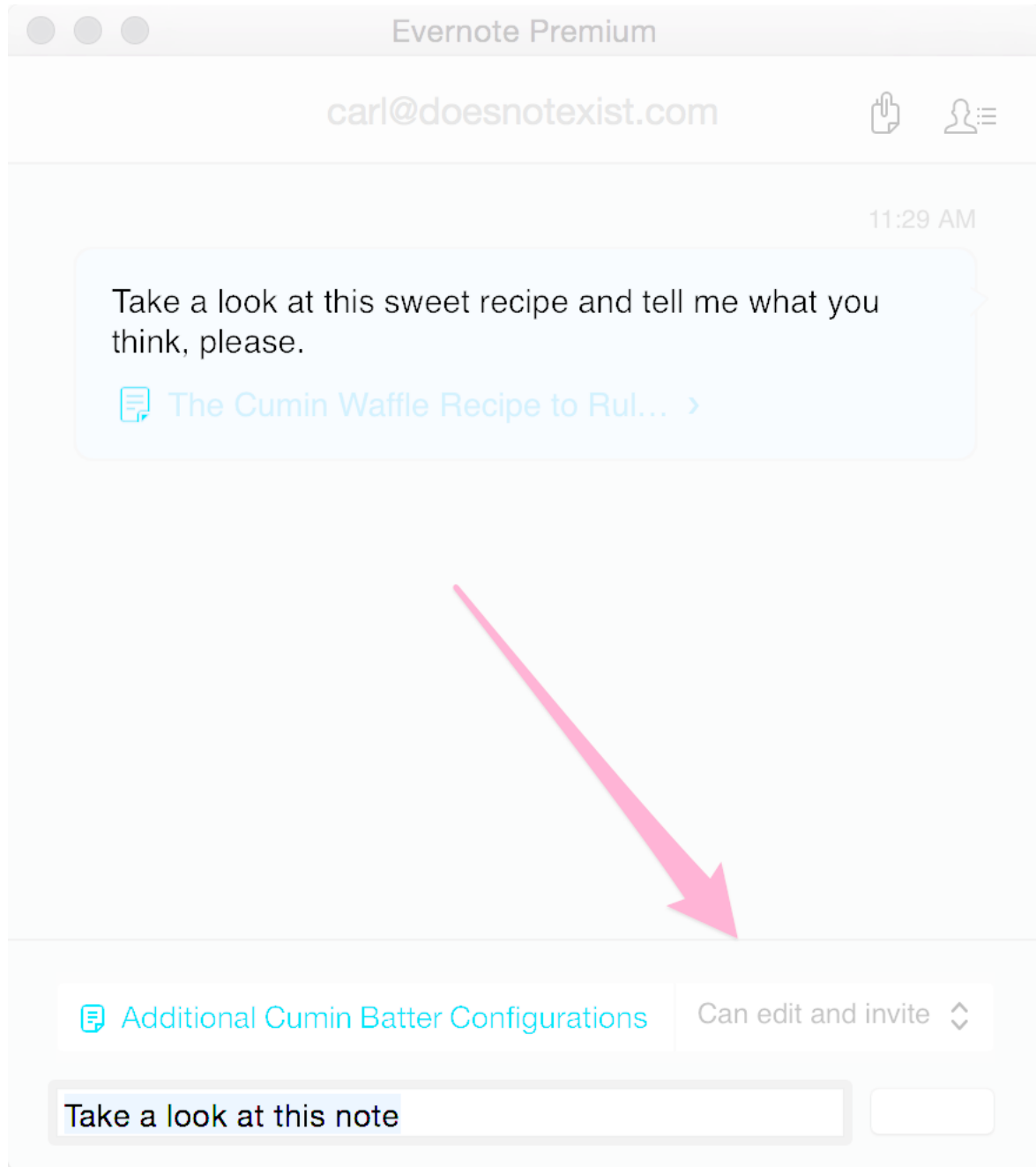
Back to Carl.

Let's say old Carl decides he wants to sell my recipe on the black market.[2] Thankfully, I get wind of his schemes before he's able to take any action and I decide he doesn't get to see my recipe any longer. All I need to do is go to that note in my account, click the Share menu and choose "Manage Note

Permissions" to revoke Carl's access to the note. I can do this by clicking the gray 'x' next to his name.
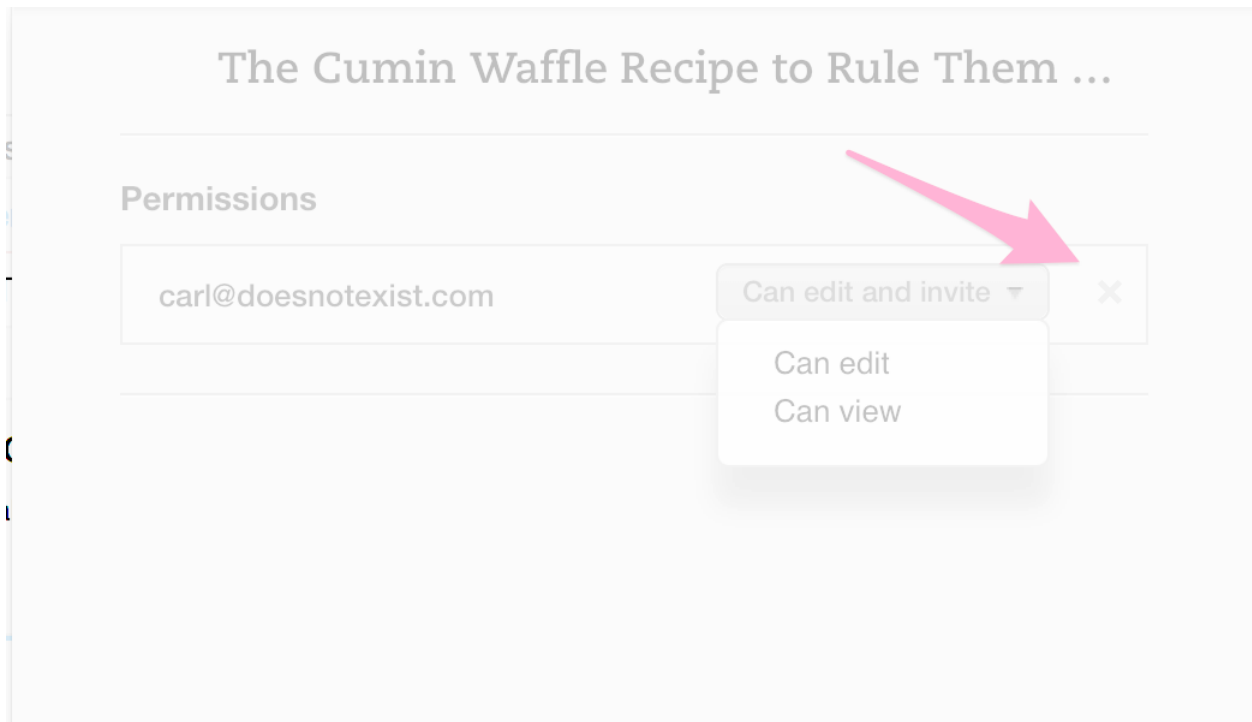
As you can see, I can also change Carl's permission level by choosing a different option from the drop down menu.

You may have noticed the Share menu contains the same two options for notes and notebooks: Share and Manage Permissions. The good news is that the notebook sharing process is *exactly* the same as the note sharing process we just described. If you right-click a notebook and choose Share Notebook, you'll be presented with the same Work Chat window we saw earlier when sharing my fancy recipe. Want to modify permissions or stop sharing a notebook entirely? Same steps as with notes. Super easy.

Oh, one more thing regarding Work Chat before we move on: you don't actually need to share content from your Evernote account to use Work Chat. If you want to just chat with somebody inside Evernote, you can do that by

clicking the New Chat button at the top of the main Evernote window.

Public Sharing

The last part of sharing we need to discuss is sharing your stuff with the world. It works a little differently for notes and notebooks, but it's pretty straightforward.

If you want to share a note with the whole of humanity, it only takes a couple of clicks:

1. Click the same Share menu we used to let Carl know about my fancy recipe.
2. Choose "Copy Public Link" on the Mac or "Copy Share URL" under Windows.
3. If the wheels didn't fall off, your system clipboard now has a public URL for the note in question that you can share literally anywhere and it will work.

Both versions of desktop Evernote will give you the option to send the public note URL to a number of different social networks using additional menu items under the "Social" submenu on Windows and the "Post Public Link To" submenu on the Mac.

If you decide you'd like to stop sharing a note that you shared publicly, you need only revisit the Share menu for that note and choose "Stop Sharing Public Link" on the Mac or "Modify Sharing," then deselect "Enable public link" under Windows.

Evernote also allows you to share entire notebooks with everybody. It's

pretty simple:

On the Mac, right-click the notebook you want to share and choose Publish Notebook. You'll be presented with a dialog box asking you to confirm that you do, in fact, want to publish this notebook. Click Publish again and Evernote will show you the public URL for the notebook, ready for your copying pleasure:

Evernote Documentation

Public link URL   Delete public link

https://www.evernote.com/pub/inkedmn/evernotedocumentation ✎
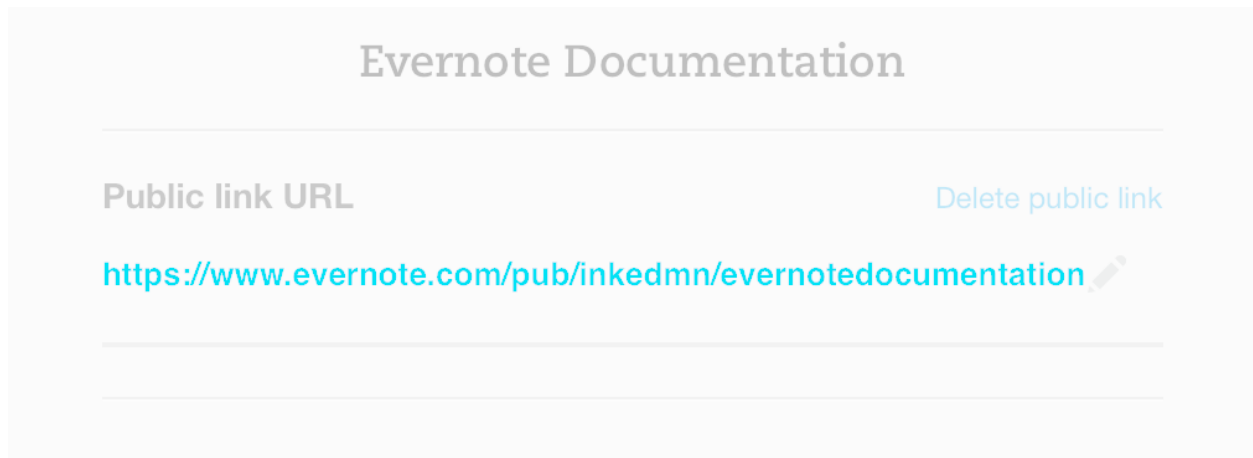
By default, Evernote will use the notebook name when building the public URL, but you can click the little pencil to change this, if you're so inclined.

To stop sharing a public notebook on the Mac, right-click it and choose Manage Notebook Permissions. You'll get the same dialog box as before and all you need to do is click "Delete public link" to stop sharing the notebook.

For the Windows users, right-click the notebook and choose "Modify Sharing…" to bring up the same dialog as on the Mac:
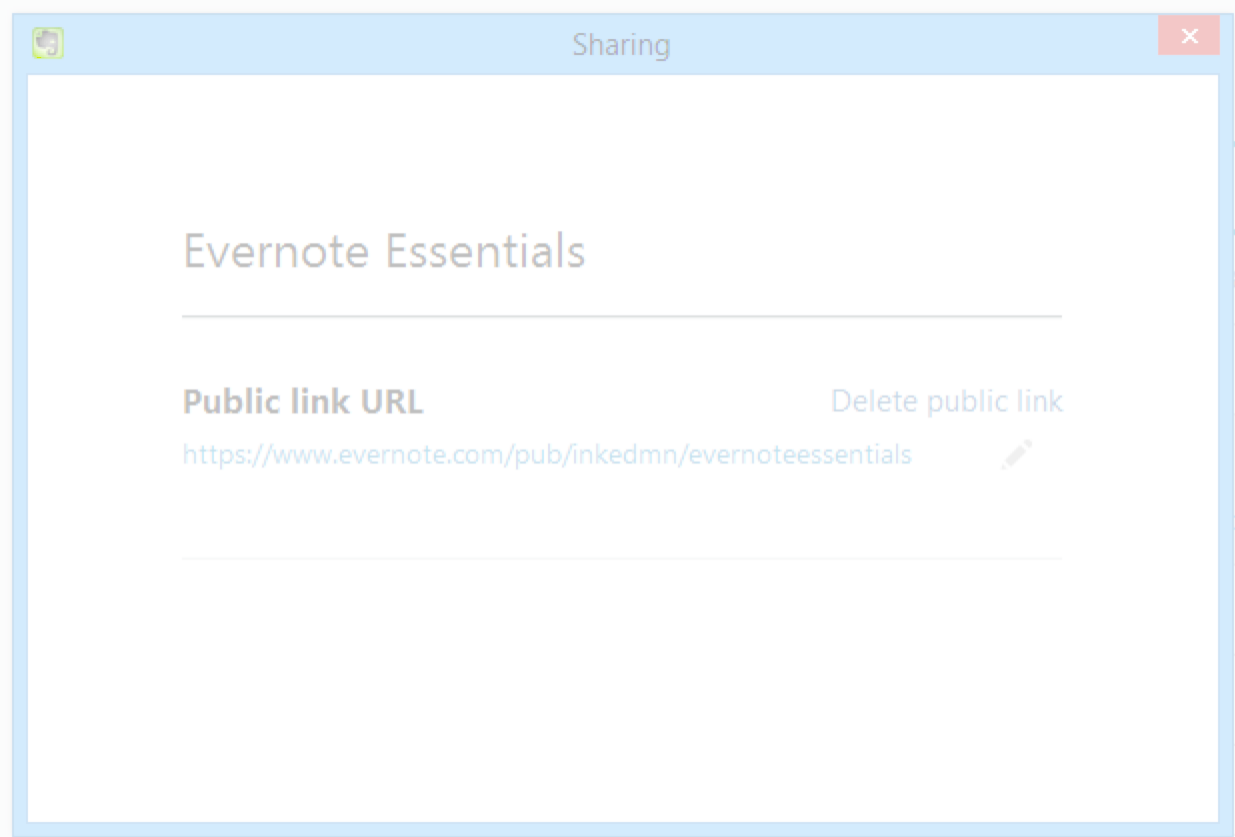
From there, it's the same dance. Copy the link and share wherever you want and, if you decide to stop sharing the notebook, use the same menu item to delete the public link.

Public notebooks can be "joined" by anybody other than the person doing the sharing. So, if I publish my cumin waffle recipe notebook and you're a huge fan of such things, you can visit the public notebook link and join the notebook.[3] Joining a notebook will cause that notebook to show up in your Evernote account on all of your devices, just like the notebooks you've created yourself. The difference is that you won't be able to edit the joined notebook or its contents. You can leave a joined notebook by right-clicking it and choosing "Leave Notebook" on the Mac or "Delete" for the Windows folk.

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[1] However, the shared note URLs were fairly complicated and contains lots of nonsensical gibberish. They

weren't easy to guess or simply stumble upon, in other words.

[2] Is there even a black market for recipes?

[3] "Subscribe" might have been a better word choice, in my opinion, but what do I know?

Tour de Evernote

In this chapter, we're going to take a long, careful look at Evernote's two desktop applications: Evernote for Windows and Evernote for Mac. For the sake of brevity and decreasing my risk of RSI from repeatedly typing those two names, I'm going to refer to them both collectively as "desktop Evernote" for the balance of this chapter.

(In all prior versions of this guide, these detailed walk-throughs were presented separately because the two applications were *very* different. Since the last time I updated the guide, Evernote has gone a long way to unifying the two desktop applications to look and behave more or less the same. As such, we're going to look at both at once. Any differences will be mentioned, of course.)

Desktop Evernote's interface is divided into four distinct parts:

1. The top part (what most people call the toolbar)
2. The part on the left (the sidebar)
3. The main part below the top part and next to the part on the left
4. The preferences window

Before you ask, no, these are not the official names. I'm a simple fellow who likes to keep things plain.

Let's start with the top part.

The Top Part

On the Mac, it looks like this:
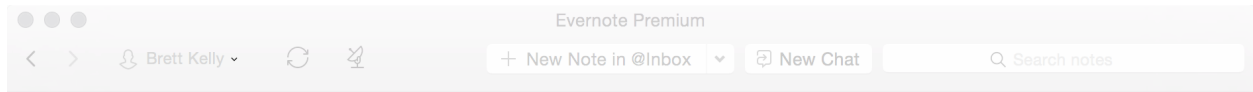
And here's how it looks if you're using Windows:

These are both the default configuration. Not identical, but pretty close. Both applications let you configure which buttons and fields appear in the top part and in which order. Changing them both is a simple, drag-and-drop affair: on the Mac, simply right-click anywhere in the toolbar where there isn't a button or field and choose "Customize Toolbar." Under Windows, click "Customize Toolbar" from the Tools menu.

Near the far left, we have my name. Unsurprisingly, that means I'm currently the active user. What you *can't* see is the other user account that's currently logged in and that I can easily switch to…

Back in 2012, Evernote introduced multiple account support for both desktop applications. As the feature name indicates, desktop Evernote can have multiple user accounts and you can quickly switch between them. It's quite convenient if you maintain multiple accounts, but it's worth mentioning here that any accounts that aren't currently active will not sync. In other words, say I'm signed in with my normal user account *and* my Fakey McNotreal test account. If I'm currently using the Brett Kelly account, ol' Fakey isn't going to sync until I switch to that account. But, whenever you switch between accounts, Evernote will sync the current account before making the jump to the other.

If you click the arrow next to the user name, you'll be able to switch accounts as well as see the current account info—whether you're Free, Plus, or Premium, how much of your monthly upload allowance is left (if applicable), etc.—as well as log out of any or all of the currently logged-in accounts.

Next to the logged-in user, you'll find a set of arrows. These work a lot like the forward/back buttons in your browser; they don't warrant a ton of discussion here, but play around with them and get a feel for how they work.

To the right of all of that is a button labeled with a circular set of arrows. This forces Evernote to sync and also indicates when it's currently syncing (the arrows will turn blue and rotate when a sync is occurring). We'll get into configuring how often Evernote syncs in a minute, but know you can always click that button to sync manually.

Up next, we have the little satellite dish. Clicking this button will display your account's Activity Stream. This will show recent sharing-related activity associated with your account — notes you've shared, edits made to notebooks you share with other people, and so forth. If you don't share notes or notebooks much, there probably won't be a lot of interesting information here (and you can remove the button by customizing the toolbar). If you share lots of notes or you're a frequent collaborator, the info presented in Activity Stream can be quite useful.

Next, we have the New Note button. By default, clicking it will create a new blank note in your default notebook, but you can use the drop-down arrow to choose from a handful of recent notebooks, if you'd prefer.

Which brings us to a new member of the toolbar team, "New Chat." We're going to chat at length about Work Chat in a later section, but for now, just know that clicking this button lets you initiate a new chat session where you can,

unsurprisingly, chat as well as share notes with other people without leaving Evernote.

Finally, we have the search field. We touched on searching in Evernote a bit already—and we're going to dig *way* into it a bit later—but it's worth taking a quick peek at our portal into the magic that is Evernote search.

If you click in to the search field, a little menu will appear just below it. While both versions share some of the same capabilities here, this is one example of Evernote for Mac and Windows diverging. Both versions will show you recent searches as well as any saved searches:[1]
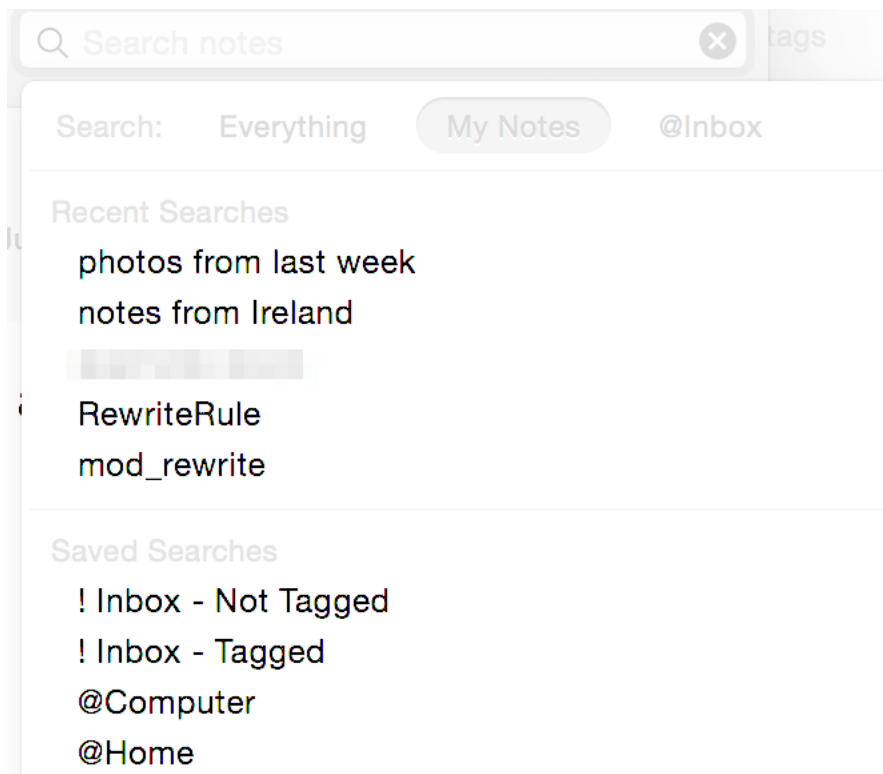
Under Windows, that's pretty much all you get. Mac users get a few more bells and whistles…

Natural Language Search is a recent-ish addition to Evernote for Mac that

will attempt to convert a plain-English query into something smarter. For example, I can type "photos from last month" and Evernote will build and suggest a query that, near as it can figure out, will give you what you're looking for:[2]
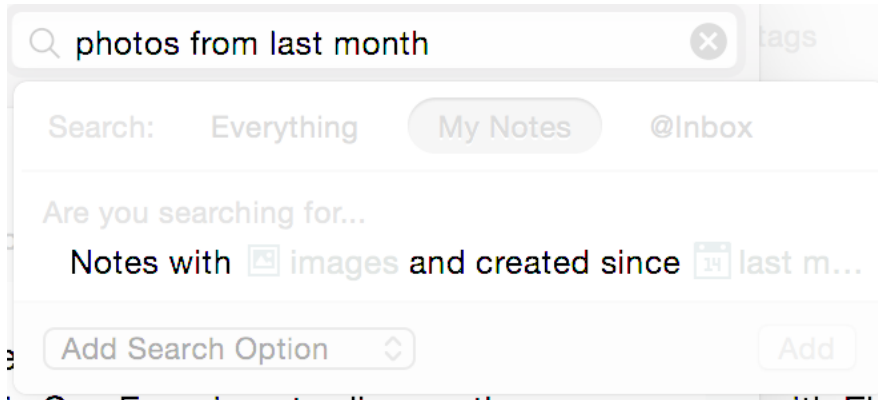
Mac users also get the ability to add different search parameters using a fancy, point-and-click menu. Clicking "Add Search Option" at the bottom of the search menu gives you several parameters to choose from:
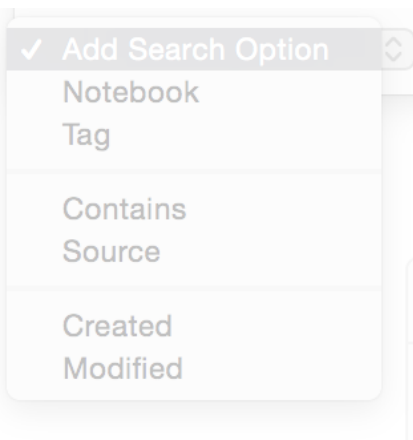
You can easily construct fairly complex search queries using this functionality, but Windows users need not lose heart: you can create the same searches using Evernote's baked-in search operators (that's the thing we're going to cover in depth in a little while).

That brings us to the end of the top part. Remember, you can customize the toolbar in both versions of desktop Evernote—though, Windows users have a far greater number of options available to them as I type this—but don't be afraid to add, remove, or rearrange the different elements and really make this toolbar *your* toolbar.

The Part on the Left

The good news is that the sidebar looks almost identical on both versions of desktop Evernote. We'll chat about the one exception in a second, but first let's go explore the items shared by both platforms:

For completeness' sake, here's how it looks for Windows folk:

- Work Chat
- ⭐ Shortcuts
- Notes (14874)
- Notebooks
- Tags
- Atlas
- Market
- Premium
- Announcements
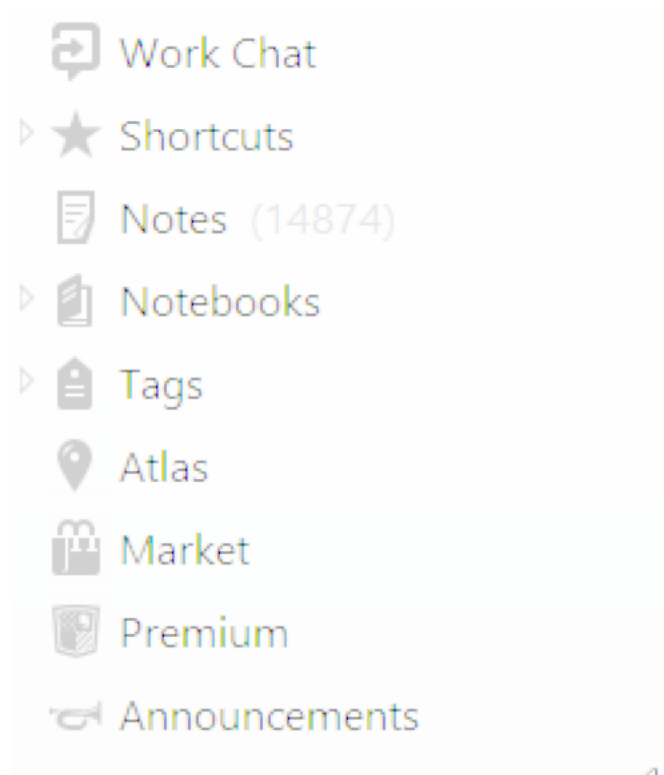
And for Mac users:

Work Chat

Shortcuts

Recent Notes

Notes 14876

Notebooks

Tags

Atlas

Market

Announcements 7

There are three visible differences here: Windows doesn't have a "Recent Notes" section, it *does* have something called "Premium" and, perhaps less obvious, Mac users can't collapse the Shortcuts section. Both platforms allow you to hide all of the various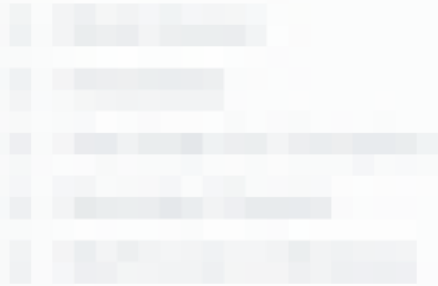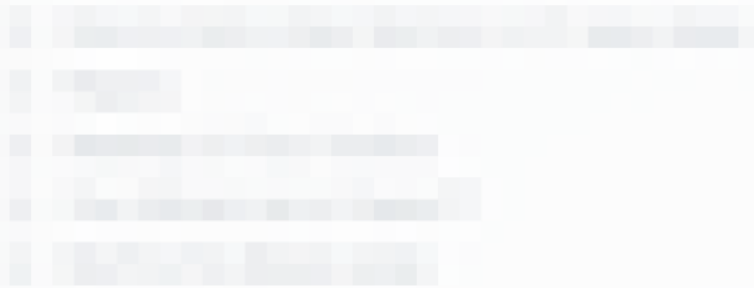 sidebar items. Windows users can click View > Left Panel to choose which items are visible. Mac users can right-click the sidebar and deselect any items they want to hide or select the items they want to see. Note that neither platform supports rearranging sidebar items.

Let's run through these, fast and furious:

- We've already touched on **Shortcuts**, so we won't rehash what they're about here. Adding a new shortcut on both versions of desktop Evernote is as simple as dragging the desired item into the Shortcuts area. Remove a shortcut by right-clicking and choosing "Remove Shortcut."
- On the Mac, **Recent Notes** does just what it says on the tin: shows you the last few notes you've edited (up to five). There's no option to rearrange or remove notes from this list, by the way. If you don't want this visible, you'll either have to hide Recent Notes entirely (or you could just quickly edit five notes to push the previous five edits off of the list, I suppose).
- Clicking **Notes** will show you the All Notes view. As you might suspect, this shows you all of your notes in all of your notebooks, sorted however the app is currently configured (reverse chronological order is the default).
- **Notebooks** shows all of your notebooks and stacks in the big part of the Evernote window to the right. We chatted about the various display options a couple of chapters ago. Also, Evernote can show you a list of all of your notebooks and stacks in the sidebar (below the Notebooks heading). Right-click and "Show Notebook List" on the Mac, or toggle the arrow next to Notebooks to expand the list under Windows.
- **Tags** works pretty much exactly like Notebooks. Clicking it displays a list of all of your tags in the big area to the right and you can expand or

collapse a list of your tags in the sidebar using the same movements as we just covered for Notebooks.

- For you itinerant folk, we have **Atlas**. Many of your notes—especially those created using an Evernote mobile app—will have Global Positioning System (GPS) coordinates attached to them. Any note with GPS data will be plotted on the Atlas map. When you load Atlas, you'll see that Evernote has already grouped your notes by rough geographical region (see the next image for a snapshot of some of my notes in Atlas). Clicking any of these groups will give you a map view of those notes. Zooming in on the map will give more precise locations for each note or group of notes. To be honest, I hardly ever use Atlas since other than for reminiscing about various trips I've taken, but I'm sure others find it useful.
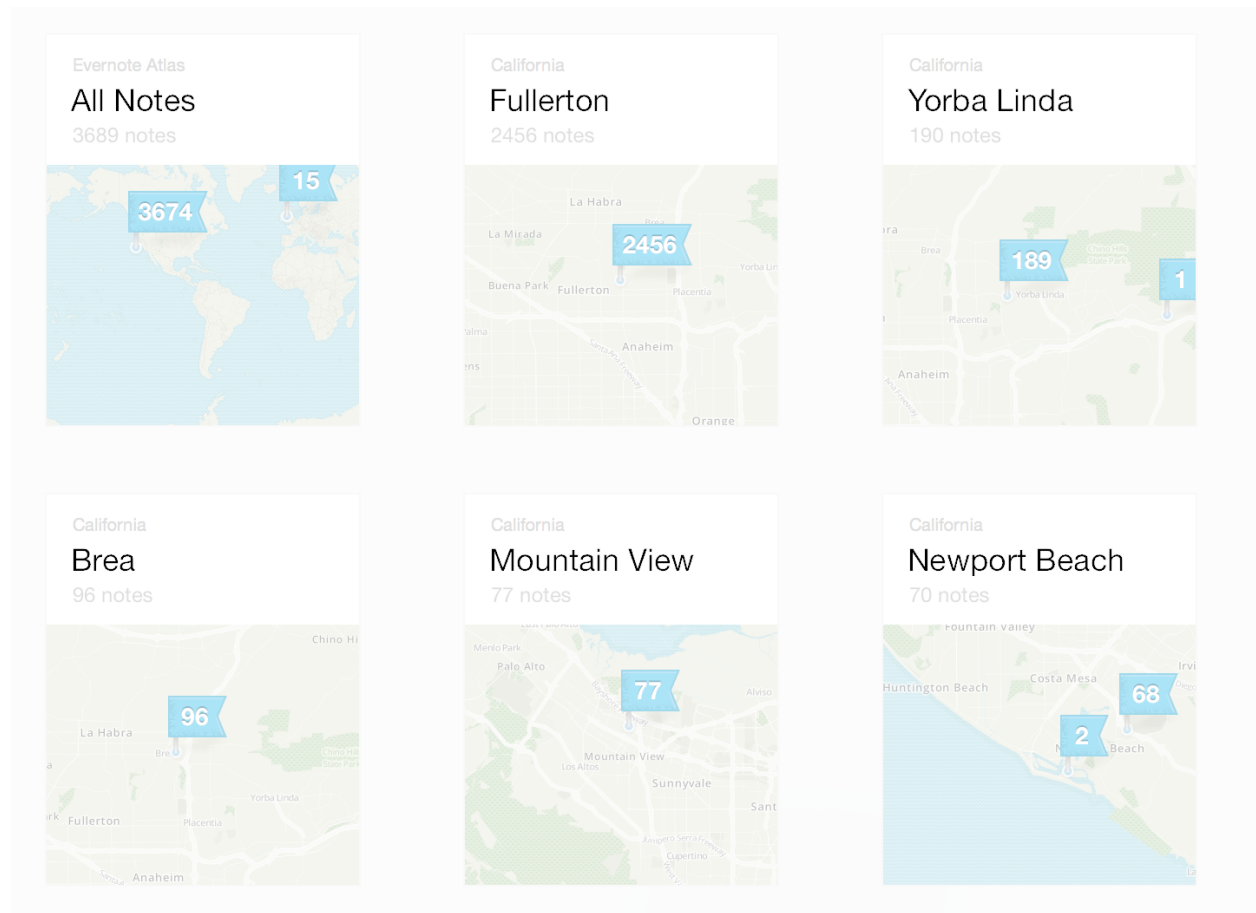
- Next, we have **Market**, Evernote's retail store. Check it out if you're interested in Evernote-branded, mostly physical goods like paper notebooks, bags, and so forth. This is also where you can buy the fancy pants Evernote ScanSnap document scanner, if you're in the market.[3]
- Windows users will notice a **Premium** sidebar item. The quick-and-dirty is this: if you're a Premium user, this view will tell you all the great things you can do with your Premium account. If you're not, you'll be able to quickly upgrade to Premium.
- Finally, we arrive at **Announcements**. Think of this as a miniature version of the Evernote blog that's syndicated directly into the desktop applications. Here you can learn about new features, application updates, and other news relevant to whatever version of Evernote you happen to be using when viewing Announcements.

The Main Part

If Evernote were a big-budget period piece designed to win an Academy Award™, the top part and the part on the left would be cast in roles designed to support our current topic: the main part. Everything up to this point in the chapter has been the setup for this very section — because this is where the real magic happens.

The main part is where you're going to record your memories, define your tasks, capture your thoughts, or whatever other awesome task use for which you decide Evernote is the correct tool.

So, enough standing on ceremony. Let's dig in.

If you've played with Evernote at all, you probably know that the main part changes depending on what's happening in the other two parts. If you've clicked

on Notebooks in the left part, the main part will show you a collection of notebooks. If you've just issued a search in the top part, you'll see the results in the main part. As we just saw, if you clicked Atlas, you'll get a collection of maps or maybe a map with notes plotted on it.

You get the point.

All that aside, the *vast* majority of the time, the main part is going to show you a collection of notes. Maybe it's the contents of a notebook, a group of notes that share a common tag, or the results of a search. Doesn't matter how they got there, really: it's a collection of notes.

In the main part—by and large—both versions of desktop Evernote have the same features and interface elements. It gets a bit tricky because they aren't arranged in exactly the same way, but there are very few functional differences between the two.

Here's a snapshot of how it looks the Mac:
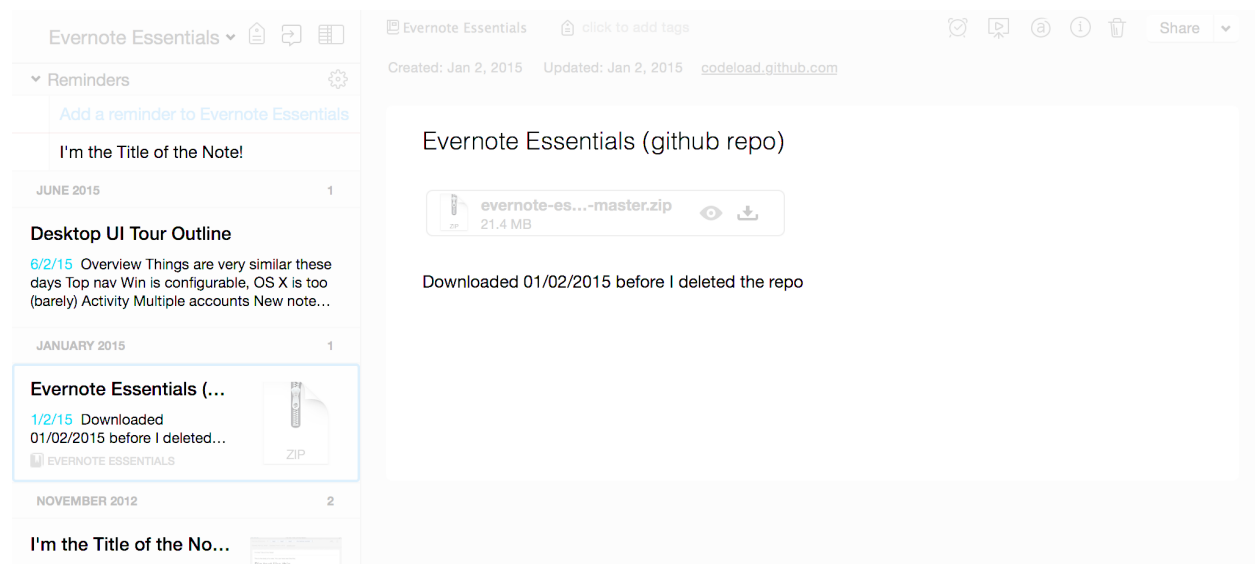
And here's the same stuff in Evernote for Windows
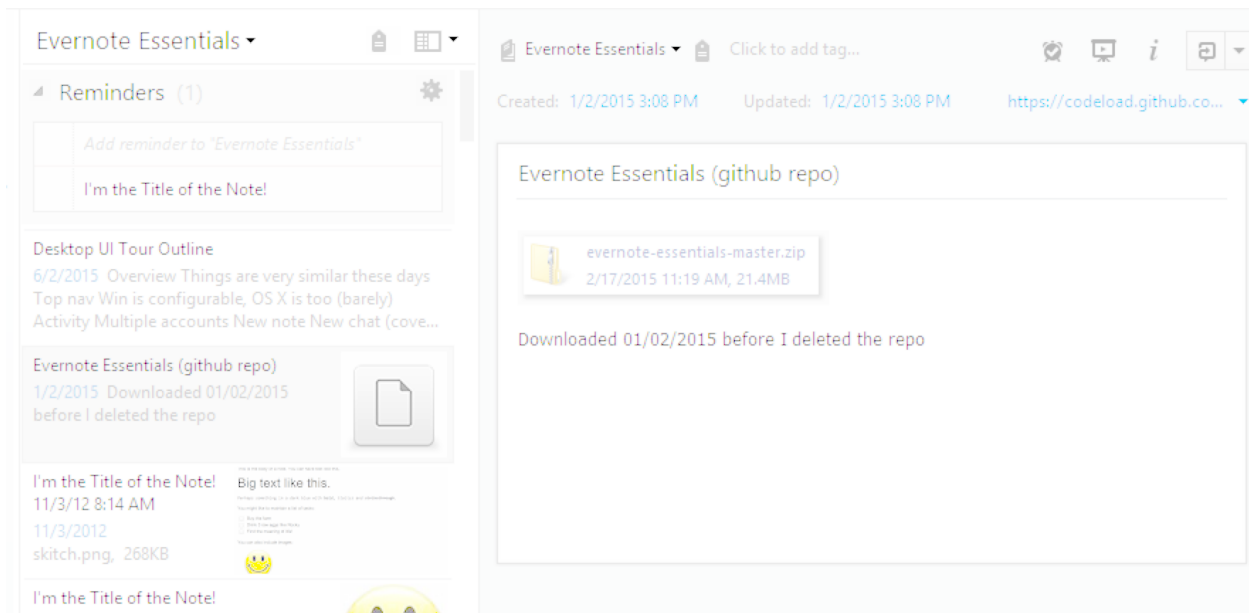
Let's start with that list of notes on the left. It's as good a place as any, I suppose.

At the top of the list, we have the name of the current notebook ("Evernote Essentials" in this case). Both versions have a little arrow next to the notebook name; clicking that will let you switch to a different notebook by selecting it from a list of all of your notebooks (or you can start typing the name of a notebook to quickly narrow the list).

Next to the notebook name is a small icon that looks like a luggage tag. Clicking it will show you a list of all of the tags represented by the current list of notes. In other words, if I click the tag while viewing the contents of the Evernote Essentials notebook, I'll only see tags that are assigned to the notes in that notebook. Filtering the notes by tag is another way to quickly locate the note or subset of notes you're looking for.

Just to the right of the tag icon in Evernote for Windows is the button that controls how the note list is displays and its resident notes sorted.[4] (It's the same

icon in Evernote for Mac, but it's neighbor is related to Work Chat, which we're going to get to in a second.)

We'll start with the note list display options. Evernote for Mac has a couple of options here that Windows lacks; we'll cover those last. Here are the options shared by both versions of desktop Evernote:

Card View shows you a tiled list of thumbnails of your notes that include the title and either an image from the note (if applicable) or some of the text. On the Mac, Card View will also group your notes by month. It looks like this:
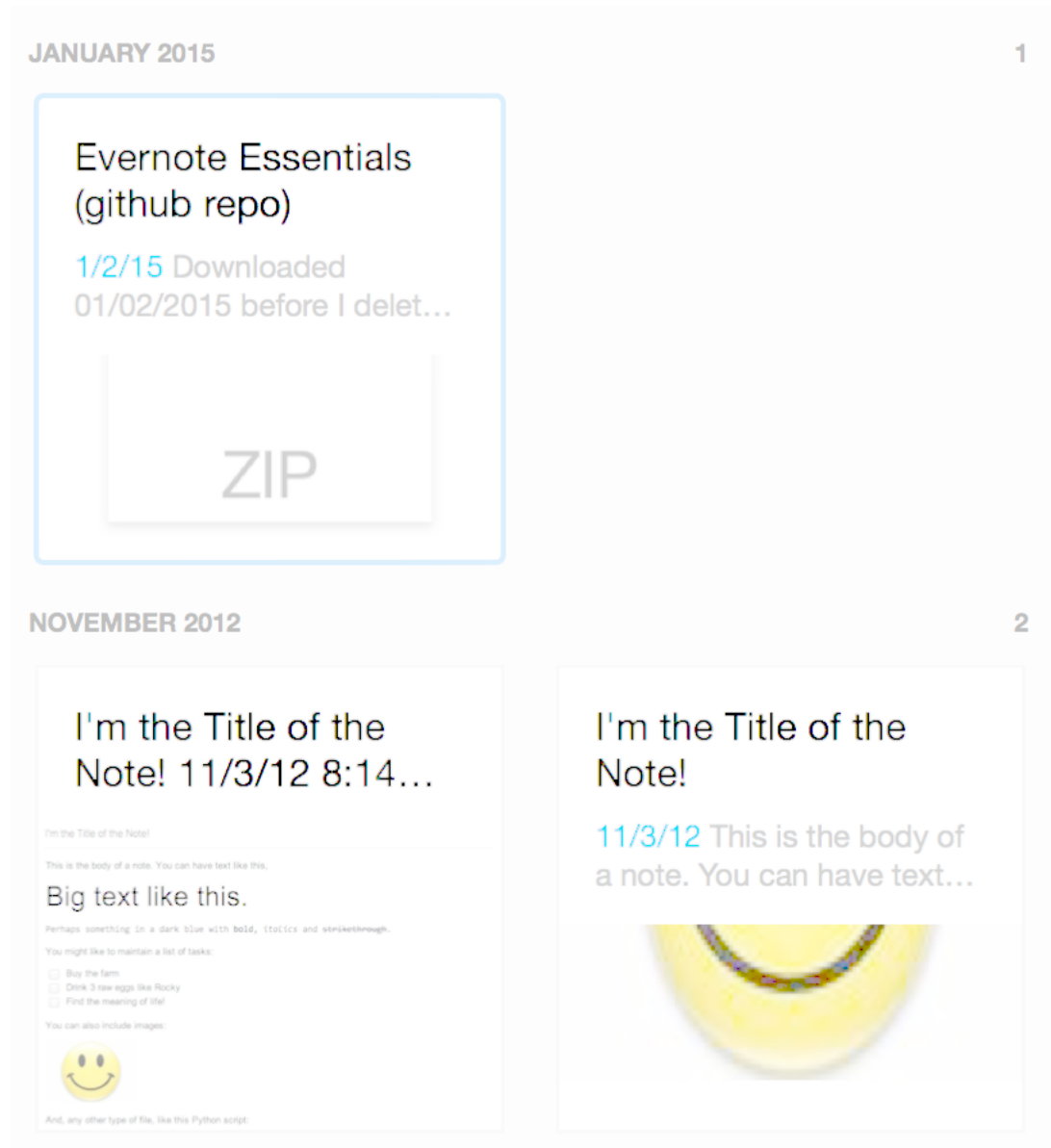
List View is the most spartan of all of the view options, in my opinion. There are no images or anything and the view is quite compact (which can be quite useful if you need to skim a large number of notes quickly).[5] Where this view really shines is your ability to customize it: you can add or remove columns from the list—Windows in particular has a ton of available columns to choose from—and you can reorder the columns by dragging them around. List View looks like this:

Title	↻	Notebook	Tags	Created	Updated
Desktop UI Tour Outline		Evernote Essentials		June 2, 2015 at 1:19 PM	Jun 2, 2015, 3
Evernote Essentials (github repo)		Evernote Essentials		January 2, 2015 at 2:08 PM	Jan 2, 2015, 2
I'm the Title of the Note! 11/3/12 8:14 AM		Evernote Essentials		November 3, 2012 at 8:15 AM	Nov 3, 2012, (
I'm the Title of the Note!		Evernote Essentials	tag1, tag2, tag3, the batman symbol	February 12, 2010 at 12:30 PM	Nov 3, 2012, (
My Funky Fresh Note!		Evernote Essentials	tag1, tag2, tag3	October 6, 2012 at 8:14 AM	Oct 6, 2012, ε
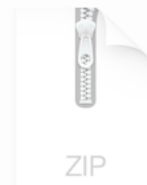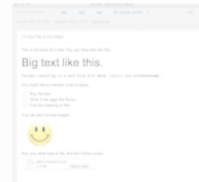
Finally, we have **Snippet View** which, if you ask me, is the best of both worlds. You can see a large number of notes without needing to scroll and the information displayed in each list item is sufficient to quickly locate the desired note. Snippet View is my most-used by a *country mile*. The initial screenshots in this section featured Snippet View, but here it is again so you don't have to scroll or flip around:
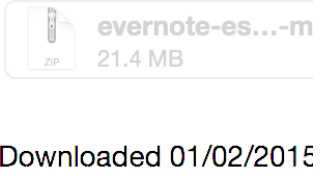
As promised, we also have two note list views available only to Mac users…

The first is **Expanded Card View**, which is just a fancy (and shorter) way of saying "Card View, but we get rid of the note preview area and fill it with additional cards." If you want to view a note from a list in Expanded Card View, you have to double-click it to open it in a new window.

Second, we have **Side List View**. Imagine taking the List View we discussed a second ago and moving it from the top of the note preview area to the left of the note preview area. Here's a look:

At long last, after all this *yap yap yap* about displaying notes, it's time to get familiar with the part of this whole mess that actually makes the notes. Let's talk about the note editor…

The Note Editor

Evernote's desktop note editor is divided into two logical parts: the toolbar at the top and the gigantic input field below it. Let's start with the toolbar.

It looks like this under Windows:

And like this on the Mac:
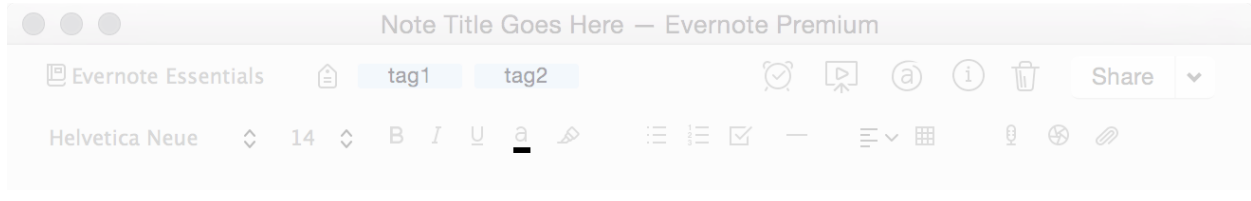
Both of these toolbars feature the usual formatting suspects: font, text size and color, bold, italics, underline, and so forth. You'll also find buttons that let you make bulleted or numbered lists and horizontal rules—thin lines extending the width of the note editor—and control how the contents of the note are justified (left, right, centered, or fully justified). Poking around for a few seconds will teach you just about everything you need to know. But, unlike your average "what you see is what you get" (WYSIWYG) editor, Evernote comes with several other options:

Highlight does what you'd expect. It's a "mode" that behaves like bold or italic. Click the little highlighter icon to begin and everything you type will be highlighted (or you can select some text, click the highlighter, and the selected text will be highlighted):
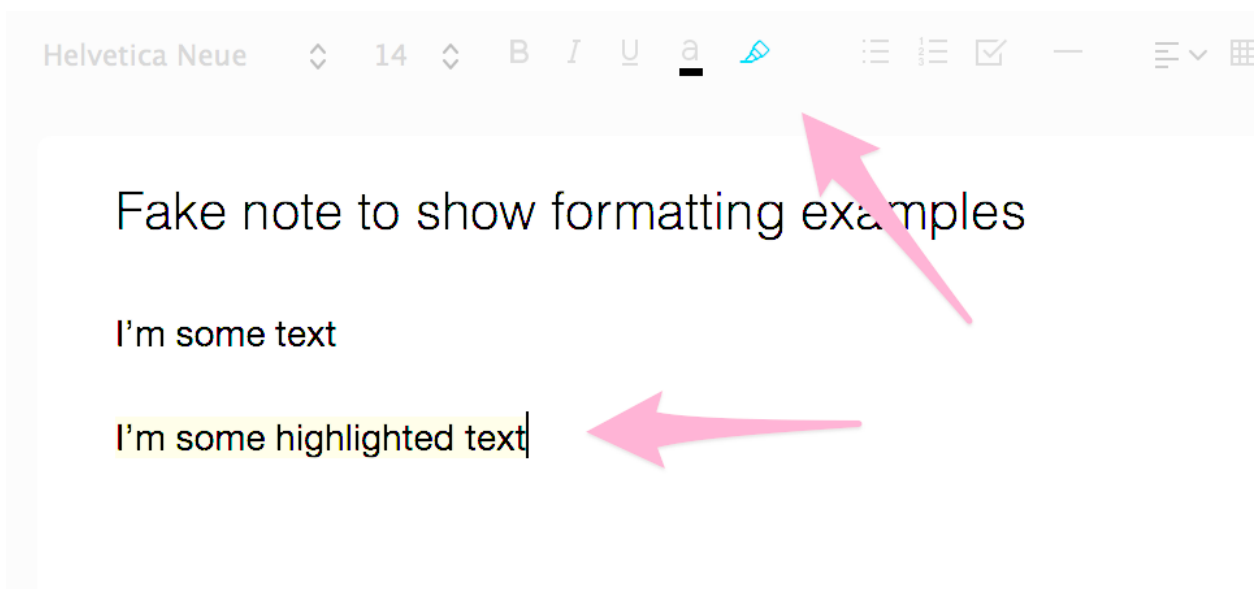
The **Todo** button (the checkbox) lets you insert—you guessed it—
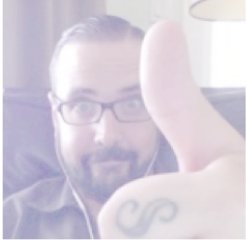
checkboxes into the body of your notes.[6] Aside from being useful for making task lists, etc., you can Evernote's powerful search operators to find notes containing checkboxes that are checked or unchecked. Todos looks like this in action:

Fake note to show formatting examples

☐ I'm an incomplete todo
☑ That guy up there is lazy.

Clicking the little grid will insert a **Table** into your note. You tell it how many rows and columns you'd like and, boom, you get a table:[7]

Fake note to show formatting examples

My	Table	Has	Cells!
Which	Can	Contain	Pictures!
	<— There's me!		
	|		

To add or remove columns from a table, just right click the table; on the Mac, the table modification options will appear in the Tables submenu. Windows users: right-click the table and the options will show up immediately. Mac users get a couple of extras with tables: click the Table Properties menu item to adjust the cell border width, table alignment, and cell background color.

At the far right of the toolbar above the note editor, we have two additional icons: a microphone and a paperclip.

Clicking the microphone will give you a small audio recorder; click "record" to begin recording audio from the system's default audio source (probably a built-in microphone, or an external microphone if one is connected and enabled). When you're finished, click Save to save the recording to the note, or Cancel to abort the whole process.
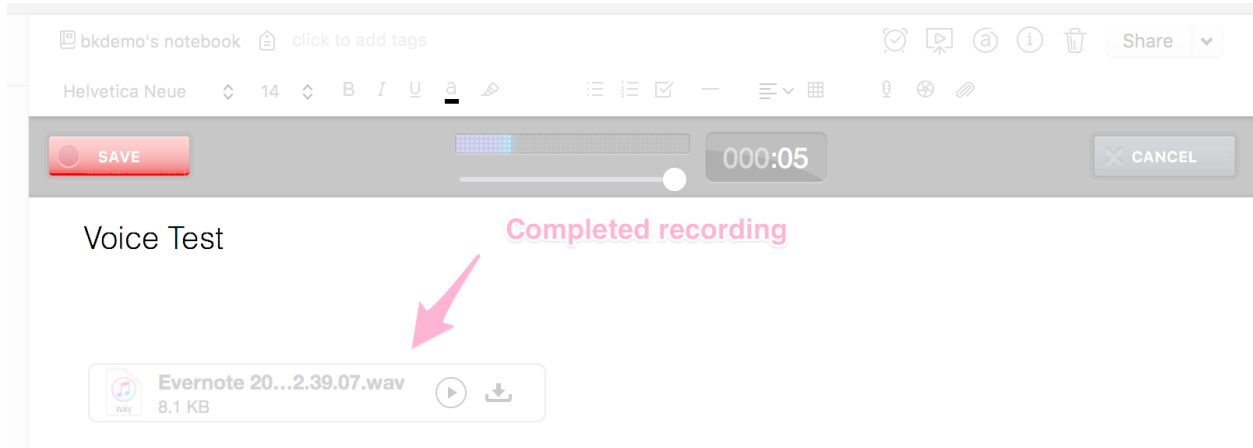
As you can see, clicking "Save" will attach the recorde audio to the note in WAV format. Remember that these audio files are fairly low-quality—it's meant for recording voices, not things like music where audio fidelity is really important. The files it produces won't sound terribly crisp, but they'll do the job if you're recording a note to yourself or a lecture in a small room.

The paperclip is for attachments. Click it, and you can choose one or more files to attach to your notes. Easy.

Mac users will also notice a small camera shutter icon among this functional cluster. Since most Apple computers ship with a built-in camera, clicking this button will allow you to capture an image using said camera and attach it to the current note:

Try again | Cancel | Use

(Marilyn says hello, by the way.)

Speaking of attachments…

Evernote is capable of displaying some files "inline" (versus "as attachment"). Adding PDF files and some Office-style documents will give you previews of the contents if you choose the inline display option. To change between the two modes, right-click the relevant file and choose either "View as Attachment" or "View Inline." By default, the app will display the file in whatever mode is set in Preferences > Clipping.

That about does it for the note editor. Play around with it and you'll find yourself getting the hang of it pretty quickly.

[1] Just to be clear, while saved searches sync across all of your devices and the web, recent searches do not.

[2] As I'm typing these words, the Natural Language Search feature—which debuted over a year ago in early 2014—is only available for English language users who also happen to use Evernote for Mac.

[3] No pun intended.

[4] I'd describe how it looks, but I can't figure out what it's supposed to be, frankly.

[5] It's vaguely reminiscent of the message list in older versions of Microsoft's Outlook Express, if you ask me.

[6] Evernote refers to these checkboxes as "todos", officially.

[7] You should know that these tables are *very* simple. Despite looking like a spreadsheet, they don't possess anything close to that kind of power and are only suited for formatting your note contents in a tabular fashion.

Shortcuts

In years past, Evernote for Mac and Windows looked and behaved a good bit differently from each other. Certain design and interface elements would be present on one platform, but not the other. Recently, Evernote has done a great deal to unify the design of the desktop applications.

Among the more notable additions resulting from this unification is Shortcuts. Long-time users may recognize Shortcuts as a reimagining of the Favorites Bar, which was a visual area in Evernote for Mac and Windows where you could drag notes, notebooks, and tags for easy access. Shortcuts behaves similarly; it's is an area where you can place links to notes, notebooks, stacks, or tags and open any of them with a single click (or tap). The huge difference is that Shortcuts can be assigned on any device and will sync everywhere along with all of your notes, notebooks, tags, and stacks.[1]

As Olivia Newton-John might have said, let's get practical.[2]

Say for instance that I create a note in Evernote on my Mac called "Missile Launch Codes" that, understandably, I want to be able to get to *very* quickly. I can drag it into the Shortcuts area at the top left of Evernote for Mac, and there it will stay (until I remove it):
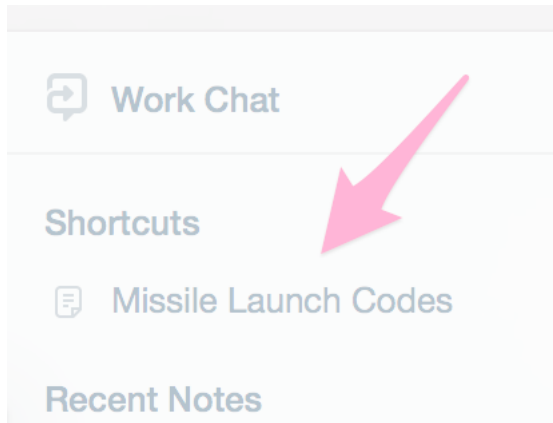
Now, once I sync Evernote on my Mac as well as on my Windows PC, I can see the same shortcut in Evernote for Windows:
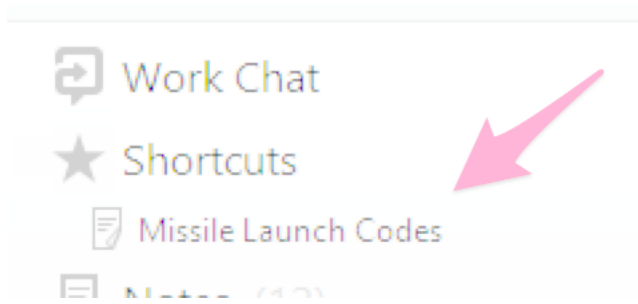
Ditto for my iPhone, iPad, Android phone, and all the rest of my vast array of Evernote-aware devices. Assuming you have multiple shortcuts, their order will be maintained across your devices, as well. And all of the Evernote clients are capable of removing the Missile Launch Codes note from Shortcuts, should the need arise.

As I mentioned, you can also add notebooks and tags to the Shortcuts area if you're so inclined. It's a pretty nifty feature and is available for all Evernote accounts.

Adding or removing items to the Shortcuts area is easy enough on Windows and the Mac: just drag and drop to add, or right-click and choose "Remove from Shortcuts" to remove. It's a little more complicated on mobile devices. Not to

worry, though: Uncle Brett's got you covered like a nice blanket…

iOS users: notebooks and stacks can be added by tapping the star at the bottom left of the screen:

Once you tap the star, you'll be shown your list of Shortcuts with an option at the top to add the thing whose star you just tapped. Tap the confirmation, and your notebook or stack will be added.

For notes, there's one additional tap; instead of the star (which isn't there) tap the ellipsis at the bottom right, then tap "Add to Shortcuts:"

Share

Present

Add to Shortcuts

Duplicate

Simplify Formatting

Delete

Cancel
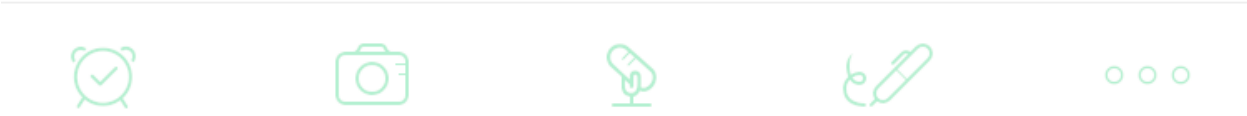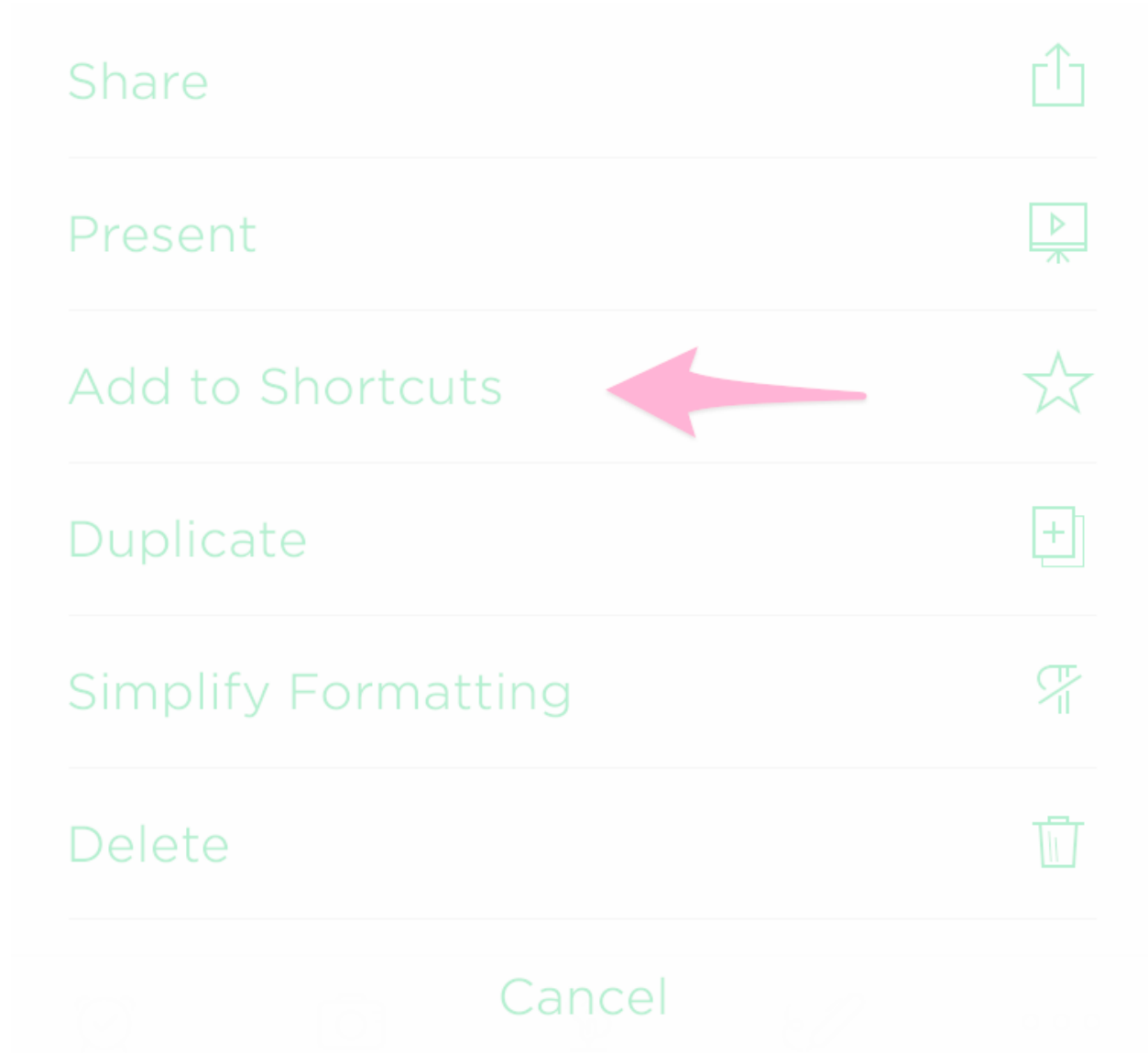
To remove any item from the Shortcuts on iOS, just swipe left across the item and tap Delete.

For the Android folks out there, the operations are similar. For each type of data you can add to the Shortcuts area, you have a few options.

Notebooks and stacks

If you're viewing a list of notebooks and stacks, the quickest way to add one of them to Shortcuts is to tap and hold a notebook or stack and choose "Add to

shortcuts." This is the only way to add a stack to Shortcuts on Android.
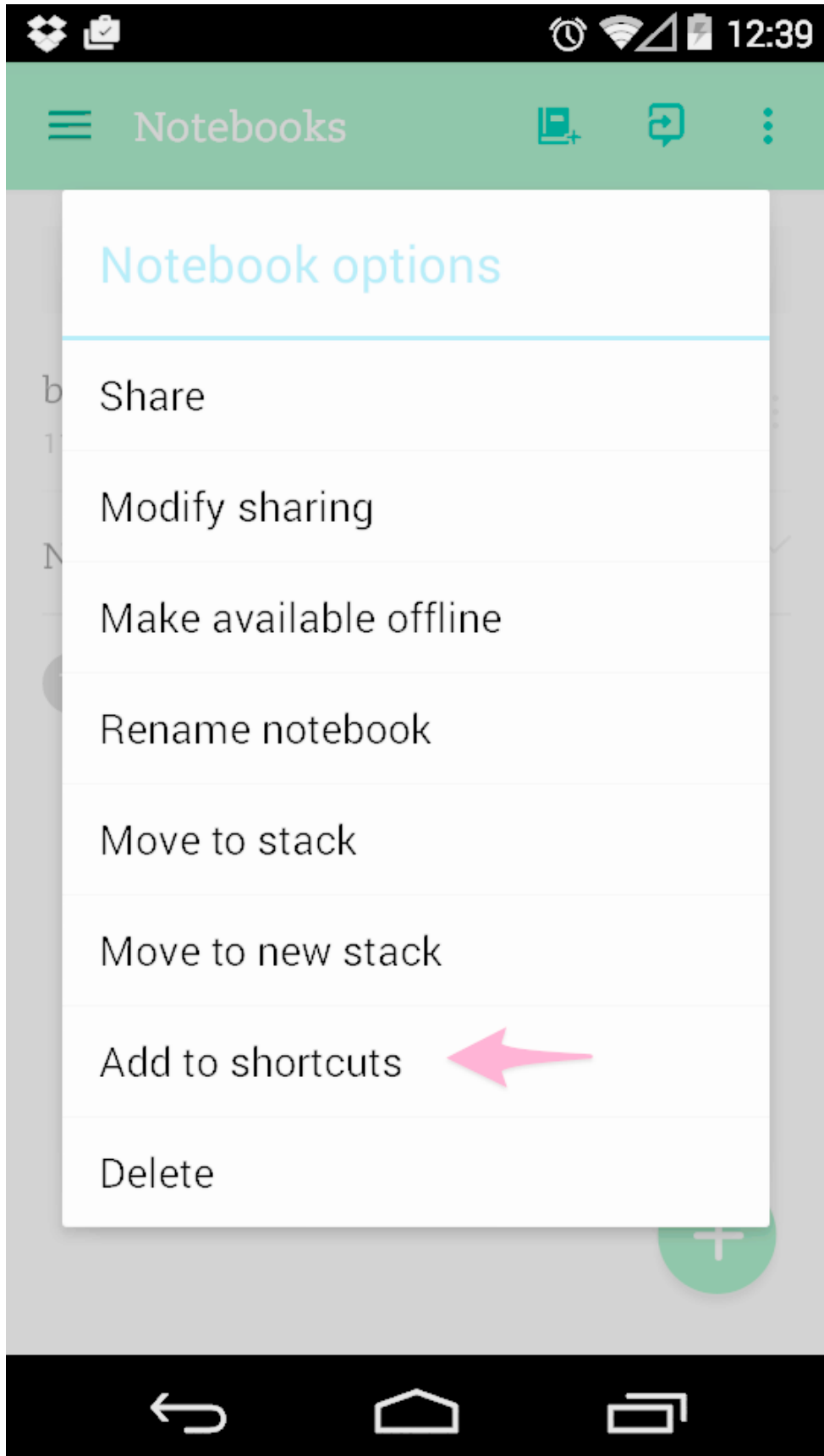
If you're looking at the contents of a notebook, you can tap the little three-dots-vertical-ellipsis button and choose the same option from that menu. Note that Evernote for Android doesn't allow you to view a list of all notes in a stack the way iOS does. It looks like this:

Notes

For notes, the process is virtually identical to that of notebooks. Either tap and hold a note or open the ellipsis menu, then choose "Add to shortcuts." Here's how the latter operation looks:
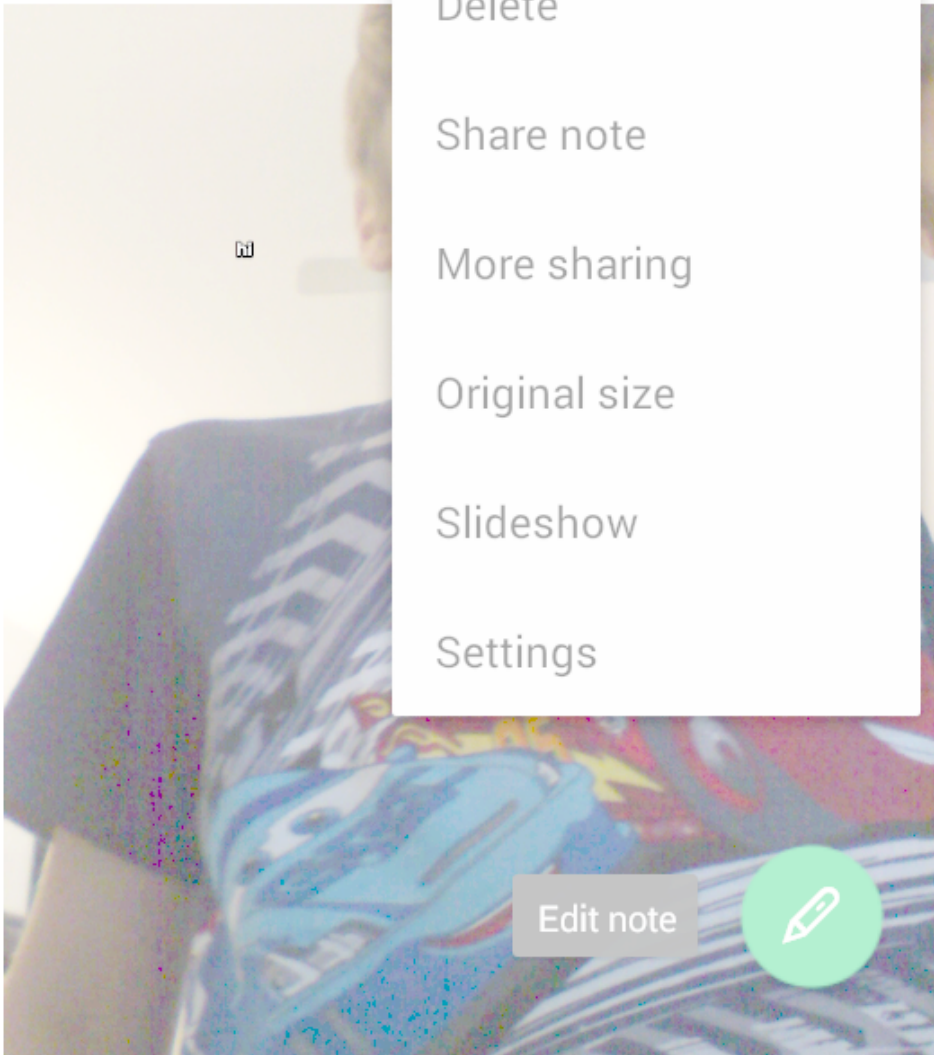
Tags

Adding tags to Shortcuts is *slightly* different. Since there's no tap-and-hold context menu for tags, you'll need to tap the tag you want to add, then tap the star at the top of the screen to add it to Shortcuts:

Ok, so that's all easy enough. Removing items from Shortcuts on Android is dead simple: tap and hold the item you want to remove from Shortcuts, then tap "Remove from shortcuts." Boom.

And, near as I can tell, there's no way to reorder shortcuts in Evernote for either Android or iOS. You'll want to do that on your Mac or PC.

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[1] The other huge difference is that saved searches can't be added to Shortcuts, which is a crying shame, if you ask me.

[2] I may have gotten that quote wrong.

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; Plus: 50mb; Premium/Business: 200mb).

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:[1]
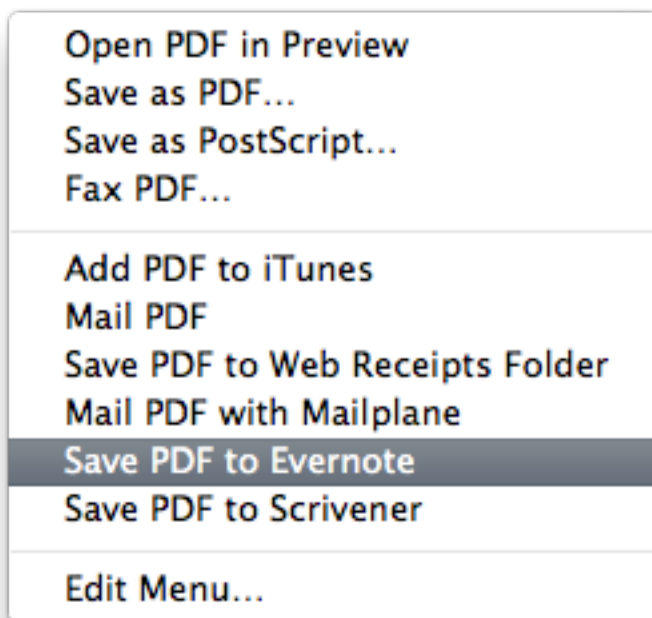
The reason this option is only available on the Mac is that OS X has low-level operating system support for creating and rendering PDF files whereas Windows does not. If you have Adobe Acrobat installed on your Windows machine, you can choose "Adobe PDF" as the printer when printing a document and save 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 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. The four most popular desktop browsers in use today—Safari, Mozilla Firefox, Google Chrome, and Internet Explorer—each have their own, native Web Clipper.

For many (many) years, the various Web Clippers looked and behaved quite differently. Thankfully, Evernote has done a *ton* of work to unify the clipping experience across all of the desktop browsers it supports. Small differences remain—and we'll cover them here—but by and large, clipping will look and feel the same everywhere.

One casualty of this clipper unification is the bookmarklet Web Clipper; this little hunk of JavaScript could be used on any browser that didn't have a native clipping extension. Sadly, it's gone now. If your favorite web browser is something other than "the big four," I'm afraid you're out of luck when it comes to clipping.

Installing the Web Clipper is easy. Let me show you…

Clipper Installation

With the exception of Internet Explorer—which I'm going to abbrieviate as IE from now on—users, the easiest way to install the Web Clipper in your preferred browser is to point it at http://evernote.com/webclipper. Evernote will automatically detect which browser you're using and give you simple instructions for installing the correct Web Clipper.

Windows users who enjoy Internet Explorer have it even easier. Once you install the Evernote desktop client, the Internet Explorer add-on is quietly installed as well. You may need to enable it for it to be visible. To do this, select "Manage add-ons" from the gear menu at the top right of the IE window, select the Evernote extension, then make sure it's enabled. Also—and this bit me not 30 minutes ago—you'll want to make sure the Command Bar is visible (since that's where the Evernote button lives). Right-click the same gear menu and ensure that Command Bar is checked. If it is, you should see the elephant below the address bar.

No matter which browser you love, installing the Web Clipper should mean you now have an Evernote button somewhere in your browser. Let's talk about how to use it.

Clipping Basics

Assuming the gnomes do their work correctly, click the Evernote icon in your browser should produce a little popup that looks something like this:

Bollywood - Wikipedia, the free encyclopedia

Save

Clip

● Article

Simplified article

Full page

Bookmark

Screenshot

Organize

@Inbox

Add tag

Add remark
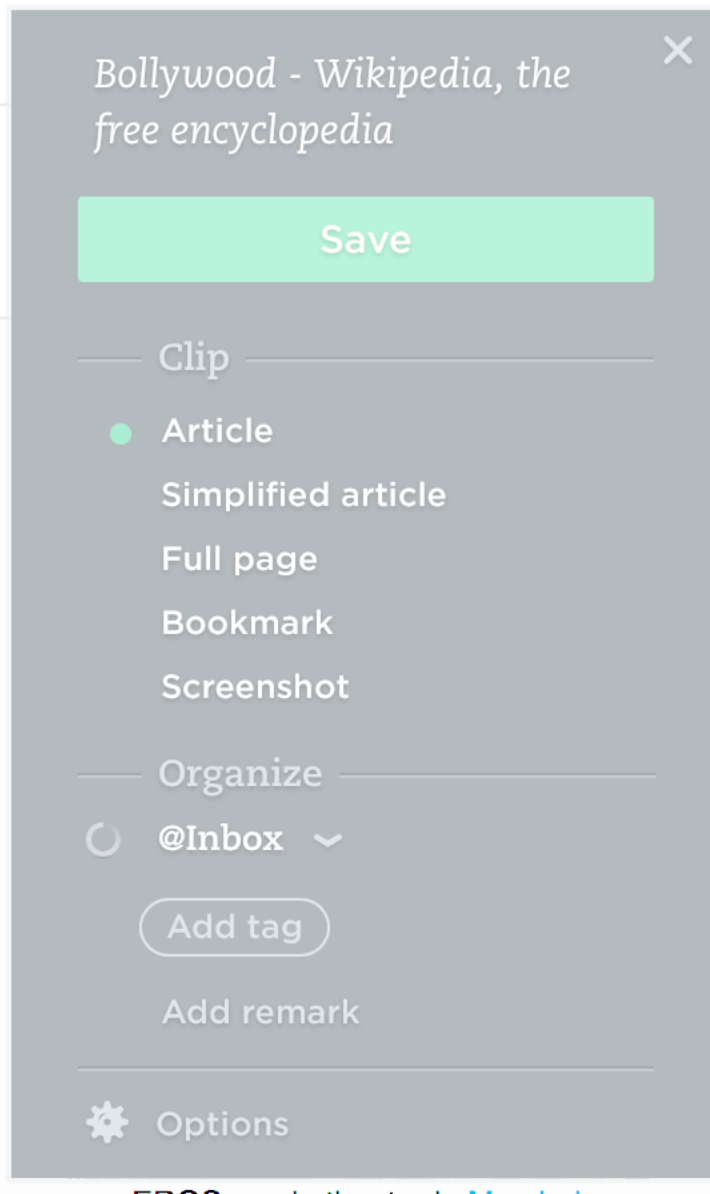
⚙ Options

Below the Save button, there's a bunch of options, buttons, and dodads. Let's

trot through them one by one.

The Clip section gives us several "actions" for how we can save this page:

Article will attempt to figure out which part of the page is the actual content (and not navigation elements, ads, etc.). Once you click Article, the Web Clipper will outline its best guess. At the top of the outlined area, you can click either the plus or minus buttons to expand or contract the selection area, respectively:

Once you're happy with the scope of the selection, click Save and that portion of the page will show up in your Evernote account. Clipping with this option also provides the unique ability to highlight portions of the text using Evernote's homegrown highlighting tool. Just select a portion of the text you want to be highlighted in the resulting note and the highlight will also be saved. Oh, and if you decide you'd like to redo or remove the highlight, hover over it and click the tiny 'x' to remove it.

In action, the highlighter looks like this:

about the Hindi film industry. For the entire film culture of India, see Cinema of India. For the tree species, see Bollywood

sobriquet for the Hindi language film industry, based in Mumbai, the capital of Maharashtra, the second most populous s dia.[3][4] The term is often incorrectly used as a synecdoche to refer to the whole of Indian cinema; however, it is only a pa lm industry, which includes other production centres producing films in many languages.[5]

of the largest film producers in India, representi...% of net box office revenue, while Telugu cinema, and Tamil cinema , and rest of the regional cinema constitutes 21% a... f 2014,[6] bollywood is also one of the largest centers of film produ t is more formally referred to as **Hindi cinema**.[10] Bolly wood is classified as the biggest movie industry in the world in ter employed and number of films produced.[11] In just 2011 alone, over 3.5 billion tickets were sold across the globe which i 0,000 tickets more than Hollywood.[12] Also in comparison, Bollywood makes approximately 1,041 films yearly, as oppose s made by Hollywood yearly.[12]

s [hide]

Simplified Article takes this concept one step further by normalizing the font, text size, etc. The end result is a very simple, readable web page. If you're a Basic user and you need to keep an eye on how much data you save to Evernote, Simplified Article is an economical way to save web pages (since it generally means fewer images). The old guard among you might recognize this action as the logical descendant of the now-retired Evernote Clearly.

Full Page does just what it says on the tin: it captures everything visible on the page and saves it to Evernote.

Selection is a "sometimes" option; if you invoke the Web Clipper while anything on the page is highlighted, you'll have the option to clip only the selected portion to your Evernote account. Otherwise, this option won't be presented.

Bookmark is a way to save the URL of a web page along with the first few lines of text and whatever Evernote thinks is the most relevant image. Looking at the bookmark selection for the Bollywood article on Wikipedia, we can see that it grabbed an image from within the body of the article (where there are several images):

I'm not sure what internal logic the Web Clipper uses to decide which image to grab, but I do know that you don't have an option for choosing the image—it's Evernote's way or the highway, in this case.

Finally, we have **Screenshot**, which takes a picture of the visible portion of the page, then allows you to annotate it using the Skitch-like tools we saw earlier. Once you're finished, the annotated image is added to your Evernote account.

Users of the Article and Full Page options should bear one thing in mind: Evernote may not capture the web page *exactly* as it appears in your browser. Things like on-page scripting—which Evernote doesn't support and strips out during the clipping process—can manipulate page elements in ways Evernote isn't able to reproduce. It'll likely be close enough, but don't be surprised if the content you clipped looks a tad different when you view it Evernote.

Below the Clip section, we have a few knobs we can twist under the Organize heading…

First is the **notebook** where the clip will be saved. This can be configured to behave a few different ways (which we'll dig into in a minute when we explore the clipping preferences), but suffice it to say that this is where you decide in which notebook you'd like this content to end up.

Next, we have the **Add tag** button which allows you to add tags to the clip. Just click the button and start typing; if the tag you wish to apply already exists in your Evernote account, it'll appear below the button where you can select it. You can also create new tags on the fly.

Finally, we have the **Add remark** button. Click it and you'll be presented with a simple text field where you can add your own comments about the content being clipped. These notes will appear at the top of the resulting note, separated by a horizontal rule:

Easy peasy.

This concludes our quick perusal of the Evernote Web Clipper's basic functionality. Let's see what happens when we click the final button in the clipper popup: Options.

Clipper Options

In a nut, this section is where you tell the Web Clipper how to behave by default. Virtually all of the options you see can be overridden during the clipping process we just explored (and without having to revisit this options section).

Different browsers will give you different options. Internet Explorer has the smallest number, by a long shot. Good news, though: everything in IE's options appears everywhere else, too. So let's take a look.

Internet Explorer
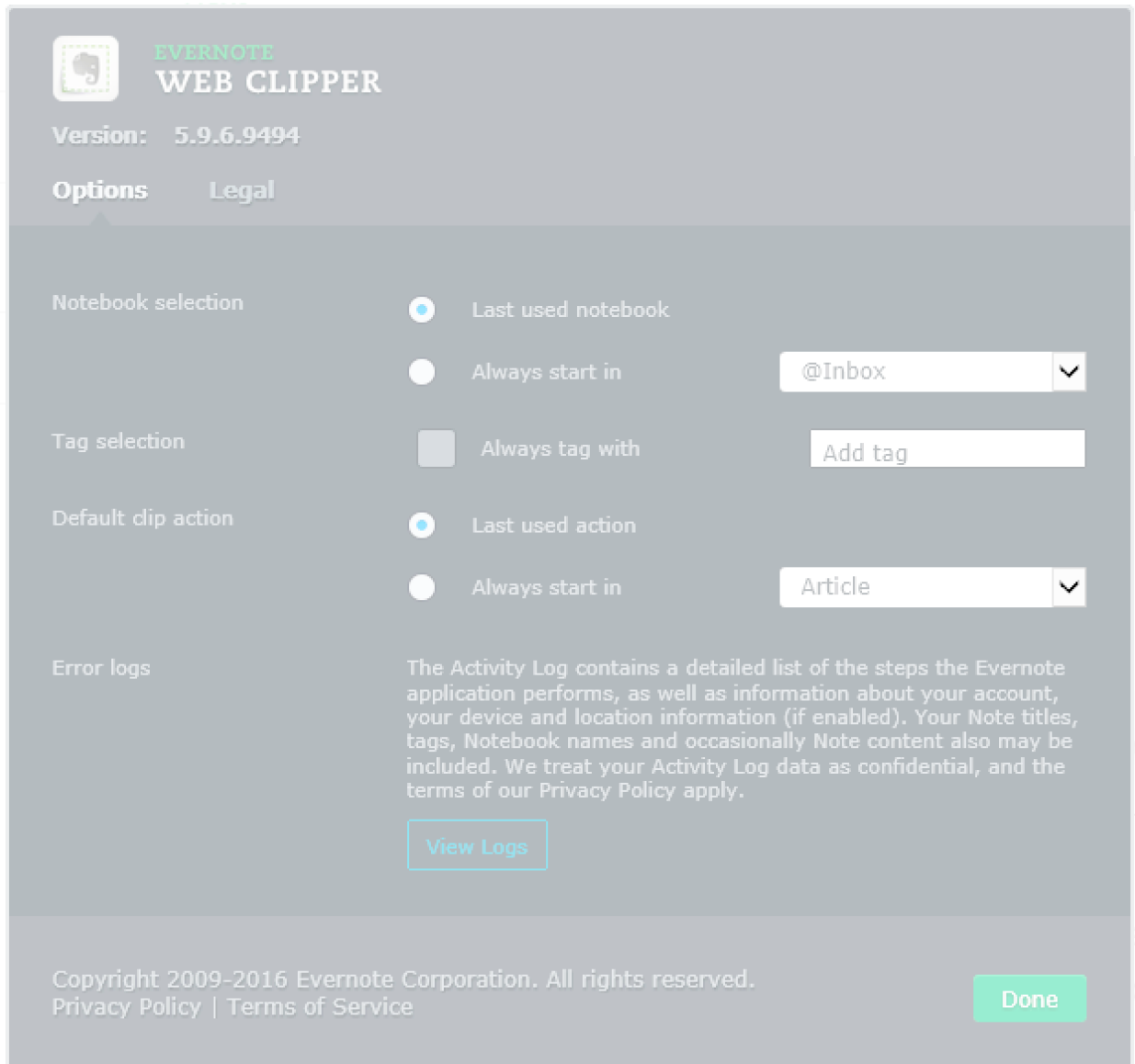
The **Notebook selection** section deals with selecting the notebook where you'd like your clip to end up. You can have the Web Clipper either stick it in the last notebook to which you clipped something or the same notebook each time.

Tag selection works similarly; simply fill in one or more tags, separated by commas, and each clip will automatically have those tags pre-assigned (but don't worry — you can remove the tags when clipping if you want to).

Choosing a **Default clip action** allows you to pre-select the default clipping "mode" (e.g., Article, Simplified Article, etc.). If you find yourself regularly switching to the Bookmark action when clipping, you can set it as the default here and save yourself some time.

That about does it for our friend IE. Let's move on to everybody's favorite underdog, Firefox.

Mozilla Firefox

Here's what the options list looks like in Firefox:
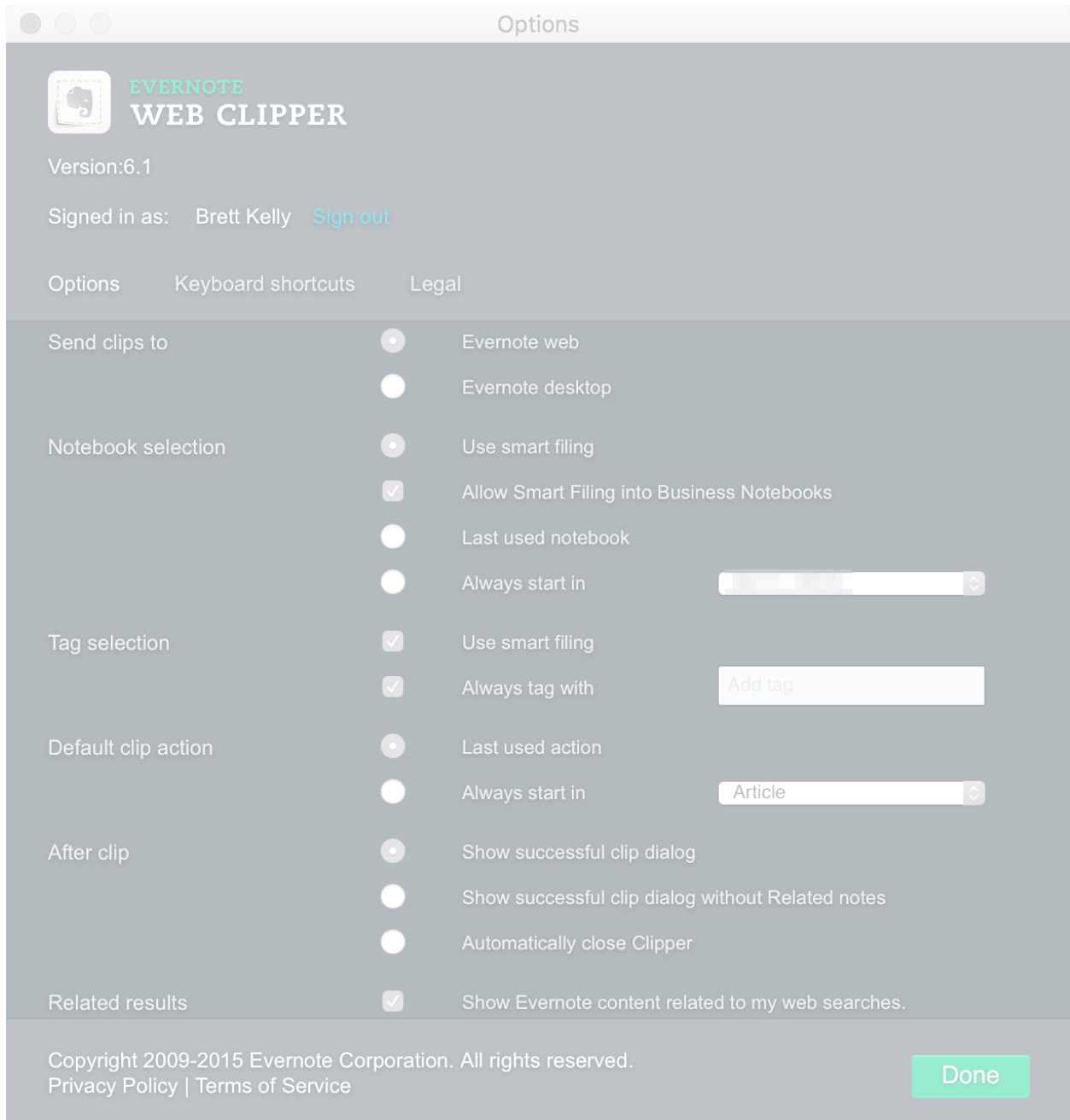
Mostly the same options as IE, but with a few extras.

Send clip to is unique to Firefox; no other Web Clipper supports this operation. The default (and, in other browsers, only) behavior is to sync your new clips directly to Evernote's web service after they're clipped. If you'd rather, you can have the Web Clipper open your new clip directly in a new note in the

locally installed Evernote application.

Both **Notebook selection** and **Tag selection** have a new friend this time around: "Use smart filing." Enabling this option will allow Evernote to compare the clipped content to the rest of your account and, based on your existing notes, try and guess which notebook is the likely destination and which tags you probably want to apply. For example, if you're clipping a page that contains the words "cumin" and "waffles" in it several times, Evernote would see that most similar notes live in a notebook called "Cumin Waffle Recipes" and are usually tagged with "delicious" and suggest both of those as candidate attributes for your latest clip.

We also have a checkbox labeled "Allow Smart Filing into Business Notebooks." If this option is enabled *and* your Evernote account belongs to an Evernote Business account, then the Evernote Business notebooks to which you have access will also be considered during the smart filing process I just described. Exercise caution here. Content saved to Business notebooks belongs to the business, not you personally (which is why this option exists).

Skipping over the already-discussed Default clip action, we come to **After clip** which, sort of obviously, lets us decide what the Web Clipper does after we've saved a clip. The first and second options are identical, except the second choice will mean the Web Clipper shows content that Evernote thinks is similar or related to what you just clipped. The last option will mean the Web Clipper quietly closes when after a successful clip. Easy enough.

Finally, there's the **Related results** checkbox. Enabling this option will mean that searches issued on popular search engines will also include notes from your Evernote account that match the search terms you used:
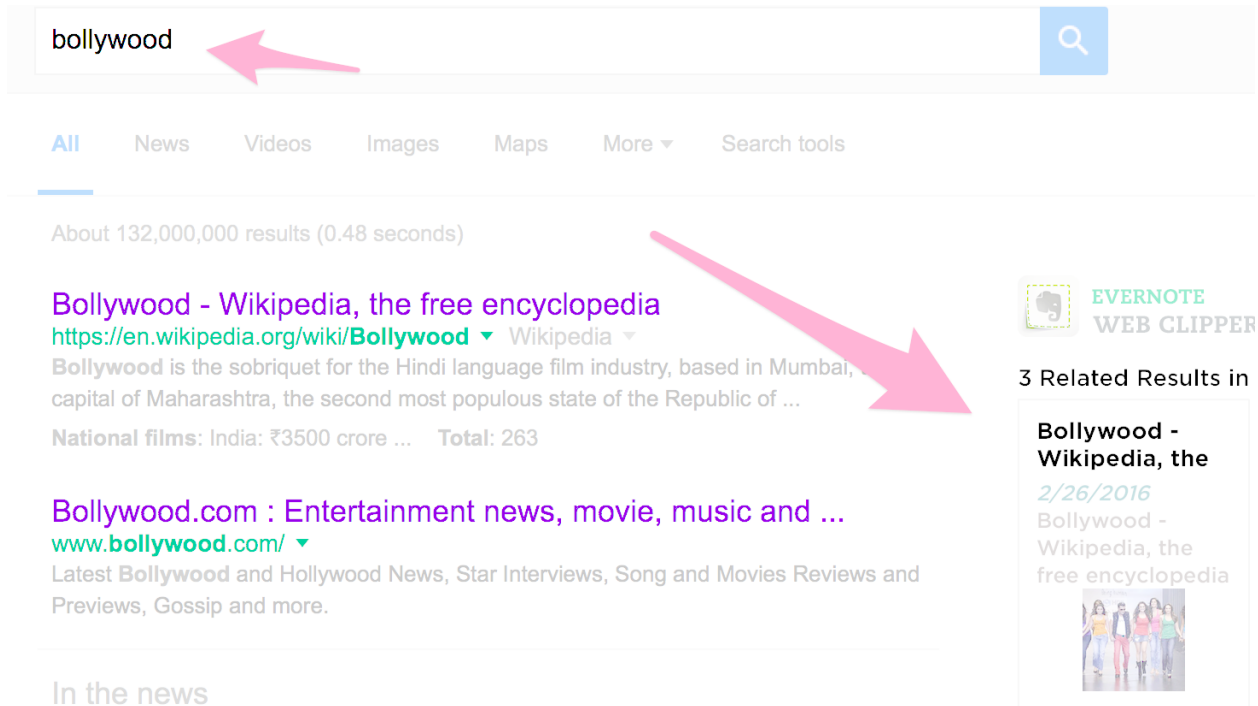
A quick glance toward the top of the options list will reveal a section not found in the IE options: Keyboard Shortcuts. Believe it or not, the only field you can edit in this entire list is the checkbox at the top to globally enable or disable keyboard shortcuts. The balance of this section is a read-only list of the various keyboard shortcuts available to invoke, manipulate, or dismiss the Web Clipper.

Since they're somewhat self-explanatory (and because we've already covered all of the options the keyboard shortcuts control), I won't cover them individually here. Play around with them and see if you like them. Personally, I don't use them very much, but only because I never got in the habit.

Ok, onto the last two of the big four: Safari and Chrome.

Safari and Chrome

Lucky for both of us, the Web Clipper preferences for Safari and Chrome are 100% identical; this is because they're both built on top of the Webkit browser project and share a great deal of the same guts. With that, let's look at the

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options:

EVERNOTE
WEB CLIPPER

Version: 6.7 (eeaba56/1.1.0.926)

Signed in as: brett@brettkelly.org Sign out

Options   Keyboard shortcuts   Legal

Notebook selection   ◯   Use smart filing

◯   Last used notebook

◉   Always start in   [Inbox   ▾]

Tag selection   ☑   Use smart filing

☐   Always tag with   [Add tag]

Default clip action   ◉   Last used action

◯   Always start in   [Article   ▾]

After clip   ◉   Show successful clip dialog

◯   Show successful clip dialog without Related notes

◯   Automatically close Clipper

Related results   ☑   Show Evernote content related to my web searches.

PDF page button   ☑   Show Save to Evernote button on PDF pages.

Error logs   The Activity Log contains a detailed list of the steps the Evernote application performs, as well as information about your account, your device and location information (if enabled). Your Note titles, tags, Notebook names and occasionally Note content also may be included. We treat your Activity Log data as confidential, and the terms of our Privacy Policy apply.

Copyright 2009-2016 Evernote Corporation. All rights reserved.   [Done]
Privacy Policy | Terms of Service

This list contains only one option not present in Firefox: a checkbox near the bottom labeled "PDF page button." With this option checked, if you view a raw PDF in your browser, the Web Clipper will give you a floating option to save the entire PDF file to your Evernote account. It looks like this:
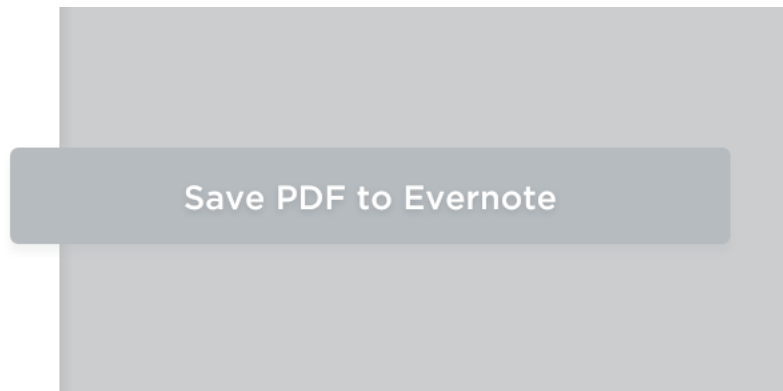
The keyboart shortcuts list for Safari and Chrome is a bit longer than it's Firefoxy counterpart, but it's also just as easily understood (and just as read-only). Skim the list and see if any of them will work for you.

That about does it for the browser clippers. Let's move on to one of my favorite ways to add content to my Evernote account: email.

Emailing to Evernote

When you create an Evernote account that's either Plus or Premium, you're assigned a special email address that you can use to send content to Evernote from any email client.[2] 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 to 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, you can assign a label to every message that ends in, say, cuminfanatic.com. 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.

For the Mac folks, you can do the same thing using Apple's Mail.app. Open the application preferences, click on the Rules tab, and create a new rule that

looks like this (you'll want to use your actual Evernote email address):

Personally, my OS X mail client of choice is called MailMate. Here's my mail rule for forwarding Amazon receipts to Evernote (bonus tip: I also move them to the Archive folder of my mailbox):

If your mail application is at all capable, it can probably do the same thing. Google for "forward rules for [your mail app's name]" and you should be ready to rock.

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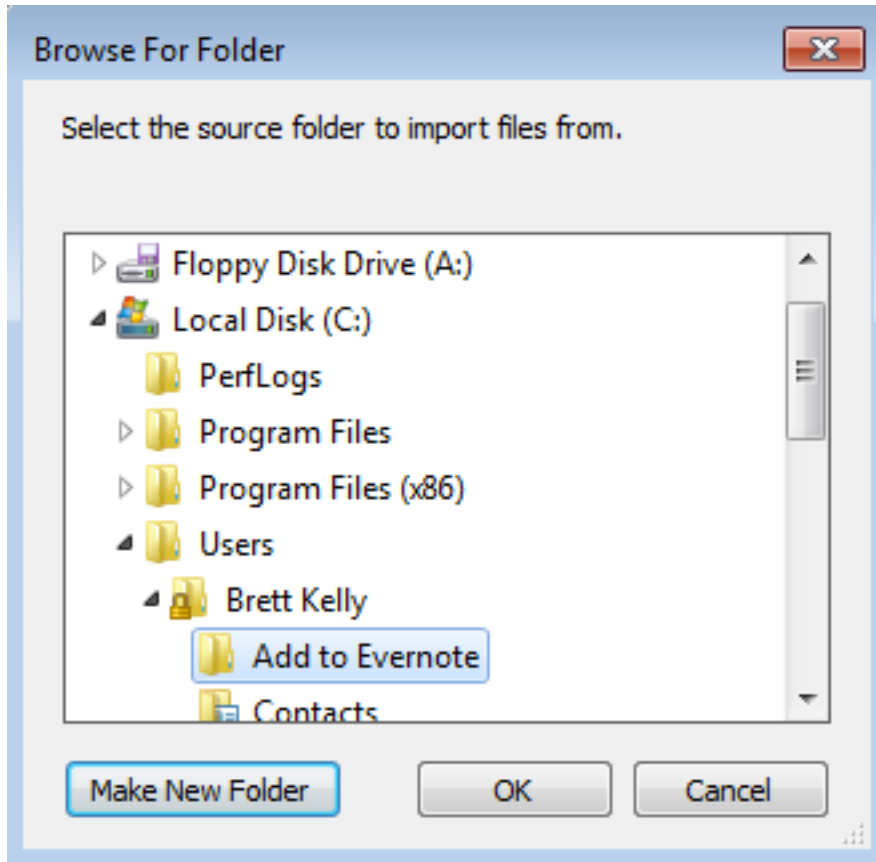
After you choose your folder, you have a few options (click to modify them):

- **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 (Basic: 25mb; Plus: 50mb; Premium/Business: 200mb).

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 App Center.

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.

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!

------

[1] 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.

[2] Up until Evernote rejiggered their pricing structure to include the Plus tier, emailing content into Evernote was available to all Evernote accounts. Sadly, this is no longer the case.

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, ask 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:".[1] 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"
```

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 locate.

Searching Reminders

There are three search operators that are specific to the relatively new reminders feature.[2] 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 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!

---

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

[2] 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.

Presenting... Presentation Mode

Presentation Mode, which is now a Premium-only feature, debuted in Evernote for Mac in late 2013 and, as I type these words, is available on Evernote for Mac, Windows, and iOS. If you're not familiar with Presentation Mode, it turns this:

Presenting...

Me!

I have words!

…into this:

Presenting...

As you can see, Presentation Mode takes the current note, makes it full-screen, and attempts to organize the note contents so they look nice in a projector-type situation (even though you don't need a projector to use it). That means there's minimal navigation, no note editing options, and no window chrome that usually surrounds a note. The goal is to make the content of a note visible from a farther-away-than-usual distance.

To view the current note in Presentation Mode...

- under OS X, strike Cmd+return or click the projector icon at the top of the note
- under iOS, choose Present from the ellipsis menu
- under Windows, strike Ctrl+Alt+Enter (or Present from the Note menu)

After entering Presentation Mode, use the up/down arrows to scroll through the contents of the note or the space bar to advance a section at a time (use shift+space bar to move backwards). Evernote for Mac can also display the previous and next notes in the same notebook as the note being viewed using Cmd+left arrow and Cmd+right arrow, respectively.

There are only a few things you can do while in Presentation Mode (other than look at it):

- Change the visual mode — Presentation Mode supports "day" and "night" modes; the former gives you a light background and dark text, while the latter gives you a dark background and light text. Use the button labeled with a sun or a moon to toggle between day and night mode.
- Change the pointer color (desktop only) — While in Presentation Mode, the mouse pointer will appear as a colored dot that will leave a long trail as you move it. Click the dot button to change the pointer color between a

handful of preset options, or to appear as the mouse pointer normally does when not in Presentation Mode.

Initial versions of Presentation Mode would simply interpret horizontal rules (horizontal lines that extend the entire width of the note) within notes as indicators that the note author would like Presentation Mode to add a page break at that point. That's not how it is now; if you enter Presentation Mode and your note has horizontal rules in it, Evernote will give you the option to convert those horizontal rules into what they call "dividers." Choosing to perform this conversion will replace your horizontal rules with invisible elements that Presentation Mode will use to separate the contents of the note into pages.

Example time!

Here's a quick note, not unlike the note in the above screenshots, that has a bit of content and a few horizontal rules:

Presentation Mode Demo

This note is going to be displayed in Presentation Mode in juuuuust a second...

First, let me add some horizontal rules.

Maybe we'll add another one!

There. That's nice.

Now, we enter Presentation Mode (note how much of the note we can see):

Your note contains horizontal rules. Convert them to dividers to help format your presentation.

Presentation Mode Demo

This note is going to be displayed in Presentation Mode in juuuuust a second...

First, let me add some horizontal rules.

Maybe we'll add another one!

There. That's nice.

If we open the Presentation Mode Layout editor and choose "Convert horizontal rules" at the top right, we'll see the content above the first horizontal rule will appear on its own (and let me apologize in advance for how huge that image is—couldn't be helped):

Presentation Mode Demo

This note is going to be displayed in Presentation Mode in juuuuust a second...

First, let me add some horizontal rules.

From here, we can access the next block of stuff by clicking the arrows (which appear when you move the mouse cursor) or by pressing the space bar.

Bear in mind that the conversion we just covered can't be undone.

While it's trivially easy to add horizontal rules so using the Evernote desktop apps—it's the little button with a horizontal line across it above the note editor— it's not anywhere near as easy to add a horizontal rule on iOS. It's technically possible if you copy and paste one that already exists, but there's no key that just *makes* them and the copy/paste operation is a clunky proposition. This could prove to be an annoyance if you spend most of your time on an iOS device.

Now, let's talk briefly about the Presentation Layout editor. Exclusive to Mac and Windows, this tool gives you a *bunch* of control over how content is displayed in Presentation Mode.

Once in Presentation Mode, you'll see a small rectangle on the right side of the screen (you may need to move your mouse cursor around a bit to get this and the other controls to appear, as they disappear by default). Click that guy and a gutter will appear containing, among a small number of other dodads, something like this:
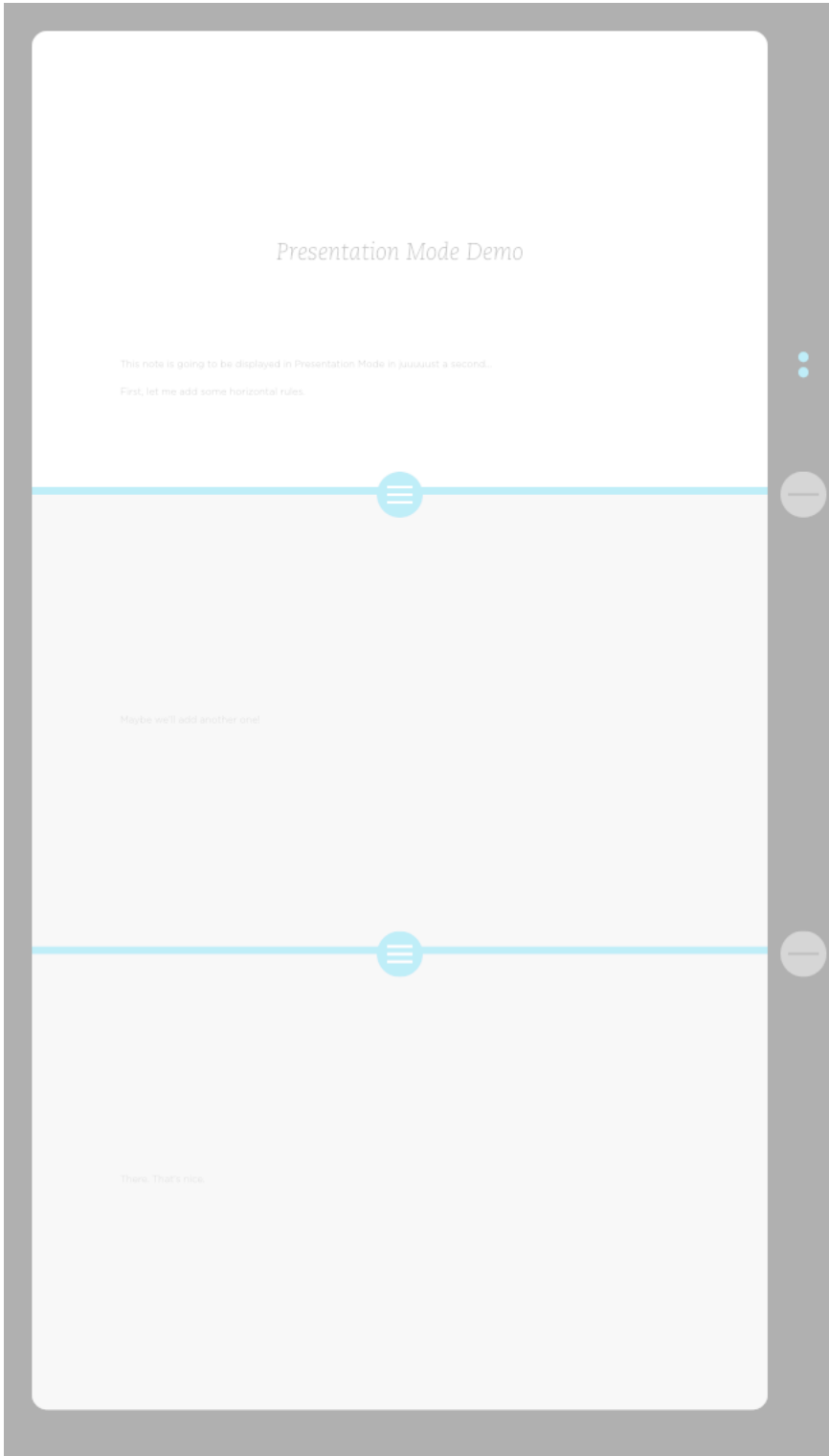
This layout editor shows how the note contents are currently divided. Easy enough, but notice three things: the tiny blue dots on the right edge, the gray

buttons with what look like minus symbols inside them, and the blue "hamburger" icons in the middle of the lines separating the different sections.

It probably won't surprise you to learn that these all Do Stuff.

Click a blue dot to insert a new divider in the note content at that point. When the new divider is created, it will inherit the gray minus thing and the blue hamburger thing. The gray minus button (which turns red when you hover over it) removes the current divider and combines the adjacent sections into a single page. Easy. The blue hamburger button lets your "resize" the sections it separates. I'll be honest: this thing is pretty easy to use but, for some reason, a bear to explain. Play around with it a little and you'll get the idea.

Finally, let's discuss the clickable options above the layout editor. Evernote for Windows only offers the "Convert horizontal rules" option we met a little bit ago. Evernote for Mac includes the "Auto layout" toggle. Enabling this will tell Evernote you'd like it to take it's best guess as to how you'd like the note to be displayed. Disabling it will essentially make the note one big section that can be scrolled through using the up and down arrows.

Use Cases

When I worked at Evernote (and I was physically at the corporate HQ, which was every few months), Presentation Mode was a very common tool for meetings and demonstrations. It was a quick and simple way to make a note legible to a room full of people. Presentation Mode was also common at impromptu "at the desk" discussions.

These days, I'm a solo guy. I don't spend much time with coworkers (since I don't have any), so I don't get much use out of Presentation Mode. It can be handy sometimes make a long article easy to read, but that's about it for me.

But, really, I'm not the target user for this feature.

Context

In late 2014, Evernote launched a new feature for Premium users called "Context." The basic idea is this: while you're working on a note in Evernote, the app will examine the contents of the note and suggest additional content that Evernote thinks is related to the current note.

For example!

Recently I clipped an article written by my pals at Rainmaker Digital entitled "Are You a Digital Entrepreneur?" If I scroll to the bottom of said clipping, I find a link to an article on Forbes.com. Clicking the link will open my web browser and load the article. Or, I can click the Share link—which is visible when I'm hovering over the link—and tell a friend about it via Work Chat.

Certain Context sources—the Wall Street Journal, most notably—support viewing the related content "inline;" click on a WSJ article and, instead of opening the article in Your Favorite Web Browser, Evernote will display the content in a special dialog box that, in addition to the sharing part available to all Context links, allows you to

- Copy a portion of the article into the current note (or anywhere else, really) as a citation
- Clip the entire article to your account

Another example:

While viewing an article I clipped ages ago about writing, Context slid up from the bottom of the screen and suggested an article from the Wall Street Journal (that I hadn't clipped). Clicking the suggestion will show me this:

THE WALL STREET JOURNAL.

Showing up at work in pajamas is a recurrent theme in many nightmares, so why do man-style PJs keep appearing on red carpets and streetwear blogs? The fashion industry seems bent on killing every taboo in the pursuit of newness.

Still, this is one crazy trend that has legs (literally). More chic than yoga wear and just as forgiving, pajamas are surprisingly versatile and can make sense as day wear or formal wear.

Copy as Citation

Send Citation

"It's a languid, approachable way of [addressing] this season's new eccentricity dressing, which Gucci is really owning right now," says Sarah Rutson, vice president of global buying for luxury retailer Net-a-Porter. A favorite subject of street style blogs, Ms. Rutson traipsed about Milan in a set of big-floral print jams from the label For Restless Sleepers last September. She paired them with velvet heels, as a nod, she says, to the velvet slippers that are traditional men's lounge footwear.

If I want to, I can highlight a portion of the article and choose "Copy as Citation" and paste it wherever I'd like:

Related Posts

- [Don't Follow Your Passion](#)

Still, this is one crazy trend that has legs (literally). More chic than yoga wear and just as forgiving, pajamas are surprisingly versatile and can make sense as day wear or formal wear.

"Fashion's Latest Command: Pajamas for Daytime"
By Christina Binkley. The Wall Street Journal. January 6, 2016

(The "Send Citation" option grabs the selected text and a link to the source article, then spawns a new Work Chat window where you can send the info to another person.)

Or, using the buttons at the top right of the dialog box, I can clip the entire article or share it via Work Chat.

Note that the whole "Copy as Citation" and "Send Citation" bits are only available in certain publications. Content from most Context sources will be linked to the original article on the web.

Speaking of Context sources…

The Settings area of evernote.com houses the list of Context sources and you can disable them individually, if you'd like. You'll also notice that certain partner companies—again, like WSJ—provide more content to folks who are paid subscribers. So, if you're a paying reader of WSJ, clicking "connect" will let you login to their site/service and Evernote will begin displaying additional Context content from WSJ.

One other Context source worth mentioning separately is LinkedIn. After

connecting your LinkedIn account to Context, Evernote will attempt to match names you type in your notes to folks in your LinkedIn network and, assuming it finds a match, will let you include some info about your pal (picture, where they work, job title, etc.).

Personally, I don't use Context. I don't have it turned off, but I don't really read the partner publications and, when I'm working in Evernote, I'm not usually interested in reading stuff related to what I'm doing. Plus, in my experience, the related content tends to not be all that "related."

Context is only available on Evernote for Windows and Mac. As we saw in the Tour chapter awhile back, you can configure—or completely disable—Context in each application's preferences.

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 and 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.

Any time you create a new note in Evernote on a device that knows about your location—mobile devices and some desktop computers—the software will include your location in the note's metadata.[1]

Practically, this means you can look at exactly—or, at least, roughly—where a note was created using any of your devices.

It's far simpler to view a note's location on a map using a mobile device, believe it or not. Evernote for Mac provides either a set of GPS coordinates or a human-readable address that can be easily pasted into your favorite map software, but no way to view it on a map. Clicking a location in Evenote for Windows quickly launches Google Maps with the supplied location. Evernote for Android and iOS both show a map with the note's location plotted.

One thing that's *not* easy to do on mobile devices is plot your current location relative to the location attached to a note. In other words, if I have a note entitled "The Best Hamburger I've Ever Had" that also has the GPS coordinates of the restaurant that serves said hamburger, it's darn near *impossible* to take that location and open it in an external map application (one that can give you directions from where you are to where the hypothetical hamburger is). Frankly, this is a frustration I've had for awhile.

But this hardly makes the GPS capabilities in Evernote useless. Far from it. I've got notes with GPS data from several different locations around the world and it's fun to reminisce about different places I've eaten, had drinks, and all that. But, for the average person, I'm not sure what other benefits Evernote's GPS capabilites offer.

Last thing about GPS before we move on…

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.

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[1] This assumes, of course, that you've given Evernote permission to access the location data provided by the device.

Evernote for Apple Watch

I don't need to tell you how popular the "wearables" category has become in the last year or two. The Apple Watch in particular has sold like something like seven million units since it became available a few months back. Hardly breaking sales records, especially for Apple, but it's getting plenty of attention.

Since this chapter focuses on Evernote for Apple Watch exclusively, I wanted to take a second to explain my reasons for not including other wearable products.

First, the only other mainstream smart watch on which Evernote runs is the Android Wear line and, after doing a little digging, I discovered the following:

- Evernote for Android wear hasn't been updated since July 2014
- It has somewhere between 100,000 and 500,000 installs (according to the Google Play Store)

I might have completely missed the boat, but those two facts led me to decide it wasn't worth buying an Android Wear to test Evernote since, in all likelihood, most of the fine folks who read this won't be using Evernote on their Android Wear watch. If I'm wrong, get in touch with me and let me know.

Aside from watches, the only other wearable device I'm aware of that runs Evernote is Google Glass. When you consider that Google Glass costs around $1,500 USD *and* that I've only ever seen it "in the wild" one time (at a Silicon Valley cocktail party — no joke), I figured it omitting it here was also a safe bet.

Having said *all* of that, let's take a tour of Evernote for Apple Watch and see what's what.

At launch, Evernote for Apple Watch displays two huge buttons:
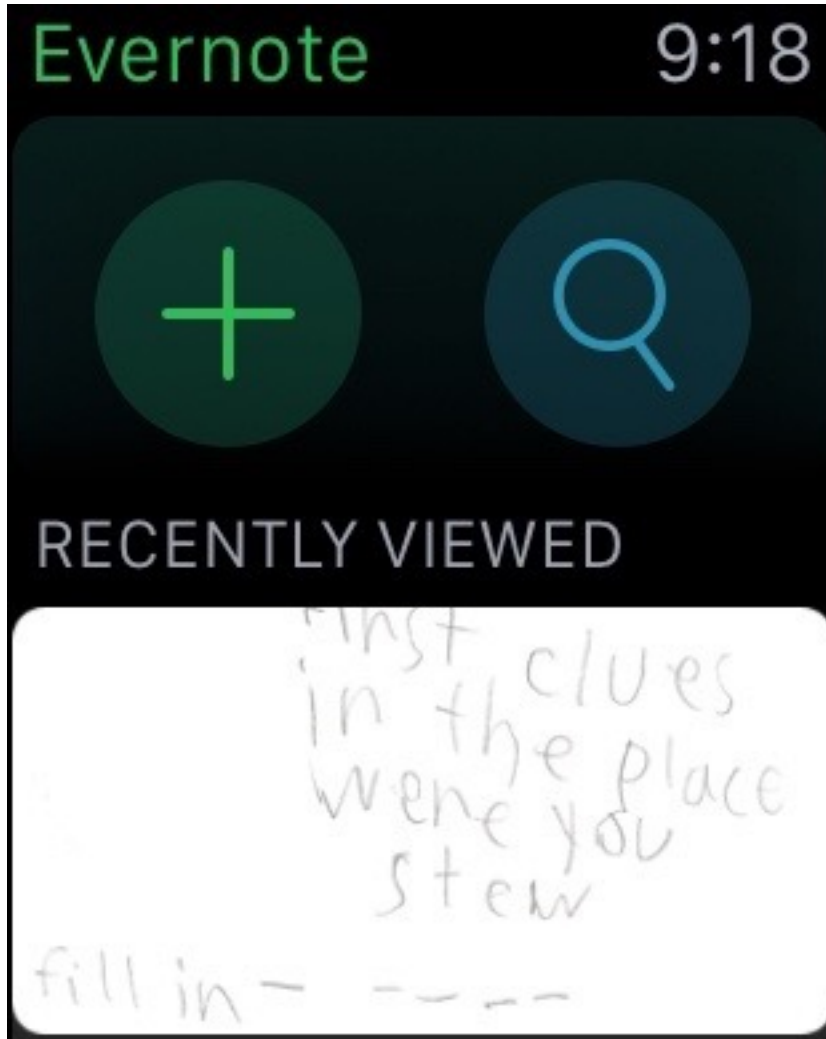
Pretty self-explanatory: the plus is how you add a new note and the magnifying glass is how you search. Both of these buttons will immediately launch the system voice prompt allowing you to dictate either the contents of your new note or your desired search terms.

When creating a new note, after dictating the contents, you'll be presented with the option to save the note as well as add a reminder. Options for the reminder are limited to either Tomorrow, Next Week, or Next Month.[1] Tap Save

and your note is saved using Evernote for iPhone and, assuming your phone is connected to the Internet, synced to the rest of your devices.

If we scroll down the launch screen a bit, we *may* find one or more of a few lists:

- Frequently Viewed
- Recently Updated
- Time of Day
- Recently Created

Note: whether these lists appear or not, as well as the data they contain, will depend on how much you use Evernote.

Most of these lists require little explanation. Frequently Viewed shows you notes that you've looked at several times, Recently Updated shows you notes you've changed recently (using Evernote for iPhone) and Recently Created—you guessed it—shows you new notes. I'll be honest, though (and maybe I'm just tired) but, for the life of me, I can't figure out *exactly* what the "Time of Day" list shows. It almost never appears on my watch and my dutiful searching of the Internet has yielded me little info about how it works.

Tapping on a note in either of these lists will bring you to a note detail view displaying the some or all of the note, depending on the note size and contents. For instance, this note has about a dozen images in it, but the detail view shows only one:
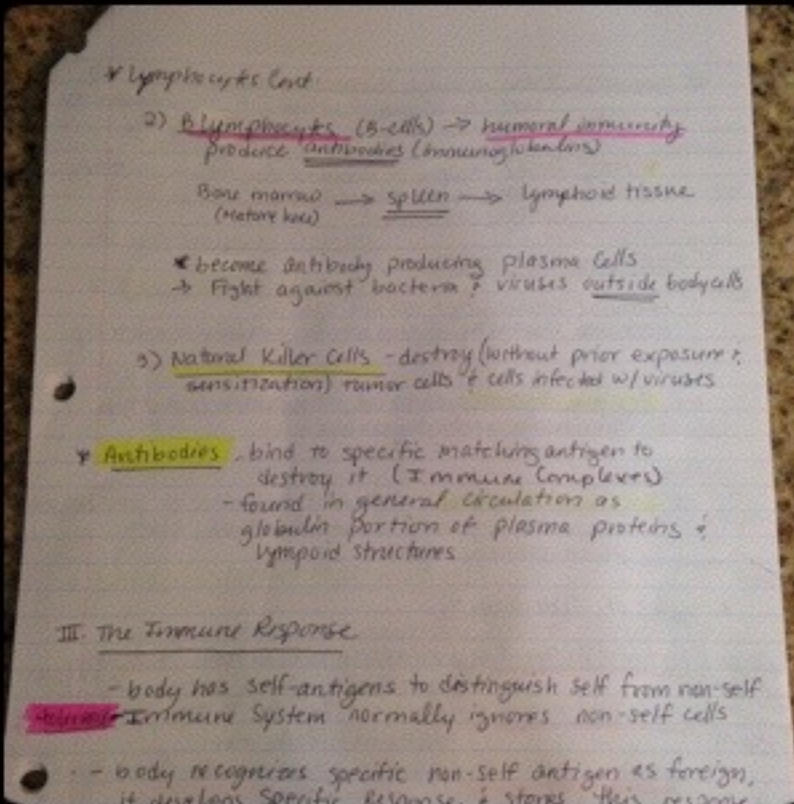
Immunity Chapter

If the note you're looking at contains todos (aka, checkboxes), they'll be reformatted such that you can change their checked state by tapping on them. Though, my testing showed that if a note contains todos *and* image attachements, the detail view may decide to only show you one of the images instead of the todos.[2]

Evernote for Apple Watch can display thumbnails of images or PDF files, but as we've already seen, the note detail view will only display one attachment (and there doesn't seem to be any rhyme or reason as to which attachment it decides to display).

Regarding notifications, Evernote for Apple Watch will indeed display them. If you have a reminder set or are involved in an active Work Chat conversation, Evernote for Apple Watch will dutifully alert you when it thinks you need to see something. Trouble is, tapping the notification doesn't do anything (like take you to the note in question).

Otherwise... that's about it for Evernote for Apple Watch. A bit of miscellany and a few parting thoughts…

I also noticed in my research that Evernote for Apple Watch tends to cache data quite aggressively. If I open a note on my watch, then modify it on my iPhone, the changes took several minutes to appear on the watch's copy of the note.

Force-touching anywhere in Evernote for Apple Watch, other than on the home screen, will give you a single option to create a new note. On the home screen, you have the same two options presented by the big buttons: new note and search.

Evernote for Apple Watch provides extremely limited access to existing notes. I suppose it makes sense since the watch's form factor and user interface don't really lend themselves to a lot of reading. No, this app is optimized for quickly capturing notes. Searching your notes works fine.

Maybe I'm all wet here, but the display is so compact that it would seem to make a great deal more sense to just pull out your iPhone so you can actually read the entire note.

From personal experience, I'll tell you that I rarely use Evernote for Apple Watch. I wear my Apple Watch every day and I like it well enough for some things, but Evernote isn't one of them. It's just easier and faster to use my

(equally ubiquitous) iPhone.

I guess all I'm saying is that your mileage may vary.

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[1] Remember, you can choose a more specific date and time for a reminder using Evernote for iPhone.

[2] One of many examples of how space constraints can affect usability. I don't doubt that this behavior was the result of several meetings at Evernote HQ.

Evernote Reminders

In 2013, Evernote introduced a new feature called Reminders. 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 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:

1. Mark as Done
2. Clear Reminder
3. 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:
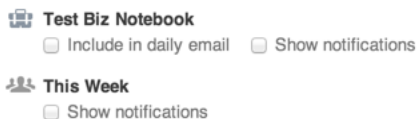
For Evernote Business notebooks (indicated by the little briefcase icon), you can enable or disable notifications as well as digest emails. If you have the "Email reminders" option enabled, reminders set in shared notebooks will always be included in the digest email. Check the relevant boxes for any 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:[1]

1. Select the notebook for which you'd like to create the table of contents.
2. Select all of the notes in the notebook using ⌘+A or "Select All" from the Edit menu.
3. Choose "Copy Note Links" from the Note menu.
4. 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.
5. Click into the body of the new note and paste.
6. Set a reminder on the note (with no date and time).
7. 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.)

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.

You'll learn this when you get to the travel chapter, but 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.

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

A Smorgasbord of Evernote Tricks and 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.

And just to show you I eat my own dog food, here's a screenshot of my notebook from my visit to the World Domination Summit a few years back:

Title		Notebook
Chris Guillebeau's Autograph		WDS 2012
Kaufman's Talk		WDS 2012
Josh Kaufman Autograph		WDS 2012
Main Stage @ Newmark Theatre		WDS 2012
Pensive Halpern is Pensive.		WDS 2012
Intimacy Kit WTF		WDS 2012
Pre-WDS Checklist and Packing List		WDS 2012
"I'm Fine, Thanks" Screening Tickets		WDS 2012
Think Traffic Happy Hour Tickets		WDS 2012
Important Places		WDS 2012
Schedule + Venue Locations		WDS 2012
JetBlue - Updated Flights		WDS 2012
JetBlue Flight Confirmation, Itinerary		WDS 2012
Hotel Monaco — Portland Hotel Reservation Confirm…		WDS 2012

Meeting notes

If you have a job, you probably attend meetings. Heck, even if you *don't* have a job (like me), you probably find yourself in a meeting-like context every now and again (I do). Evernote is a fantastic place to both take and store meeting notes. It's quite rare to find me in a meeting without my iPad or MacBook Pro open on the table in front of me, dutifully recording the salient points in Evernote.

"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"

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.

I have a notebook called "Want to Buy" where I drop photos, web clips, or just short bits of text describing the item I simply *must* have. Every so often, I revisit my list and discover that maybe I didn't want that fireplace lighter shaped like a moose as much as I thought we did.
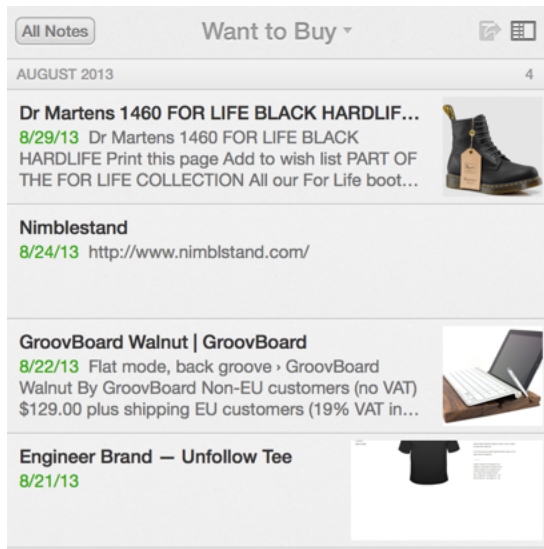
This works particularly well because it's *super* simple to add things, especially stuff we find on the web. Go ahead and give it a try.

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.

Ignoring the part about throwing a forgetful coworker under the bus, Evernote is a great place to plan large projects since it can hold so many types of data.

Running lists

No, not that kind of running.

I'm only slightly[1] embarrassed to admit to you that, in the past few years, 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.

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.

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

Organizational Cage Match: Tags v. Notebooks

Since I first launched Evernote Essentials, folks have asked me this question time and time again…

"It seems like I can build my organizational strategy around either tags or notebooks. Which should I choose?"

Fair question, certainly. As a cumin waffle connoisseur, one could either create a notebook called "Cumin Waffle Recipes" or tag all of the related notes as "cumin waffle recipes" and arguably produce the same level of organization.

If you want my opinion, go with notebooks—and I'll tell you why (but don't worry — tags will have their opportunity for rebuttal in a moment):

1. Notebooks offer more flexibility in terms of collaboration. It's not possible to share all notes that share a common tag, nor can new notes with said tag automatically be made available to colleagues, coworkers, or family members.
2. Tags are optional, but every note *must* live in a notebook, so there's no chance of "orphaned" data in your account. It either lives in one notebook or another, but it never lives outside all notebooks.
3. My brain has an easier time wrapping itself around the notebook metaphor. I can sit back and imagine a binder labeled "Cumin Waffle Recipes" than a stack of papers, each bearing a small label stuck to the top that says "cumin waffle recipes."

Those reasons may read like hogwash to you, and that's perfectly fine.

Remember these are my *opinions*—great minds differ on things like this.

So, what about tags? Certainly there are some plusses worth considering, right?

The following points assume that the user has largely avoided using notebooks for organizing their notes.

1. Tags allow you to categorize data in multiple ways. If I scan a printout from my daughter's doctor appointment, I can tag it with both her name and "medical." I'm now able to look at everything in my account related to medical care and/or everything in my account dealing with my daughter. In a larger sense, tags allow your data to be organized in ways that weren't obvious when the tags were first applied.
2. Tags are lightweight; you can apply and delete them quickly.
3. Mentally speaking, tagging feels like less of a commitment than choosing a parent notebook; I can apply several tags and know that I'll probably be able to find the note later without worrying too much.[1]

If keeping everything in one notebook is how you like to work, then you have my full support. Personally, I prefer to create notebooks for large topics, projects, or areas of responsibility. A few examples from my very own account:

- Everything having to do with this verion of Evernote Essentials lives in a notebook called "EE v5." It contains a couple dozen notes including content that needs to be fixed from the previous version, marketing ideas for launching this version, new content for this version, etc.
- I do a little bit of marketing consulting these days, and each client gets their own notebook with meeting notes, strategy brainstorms, and research documents.
- I've participated in several online courses on various topics over the years,

and all of the notes I took during each course live in a course-specific notebook.

- Each tax year for the last five years has its own notebook where I keep receipts, records, and tax forms for the year in question.

I could go on.

Everything in each of those notebooks could be tagged with whatever I want, of course. And maybe adding tags would make it easier for me to find a given note in the future. In my experience, notebooks just work better. But, just like with yogurt toppings and beard styles, personal preference has the final word here.

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[1] This kind of cognitive comfort is bolstered by a thorough understanding of Evernote's vast search syntax, which we covered before.

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 computer[1] 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,[2] the creation of a notebook now offers a third option (beside local and synchronized notebooks): Business Notebooks.
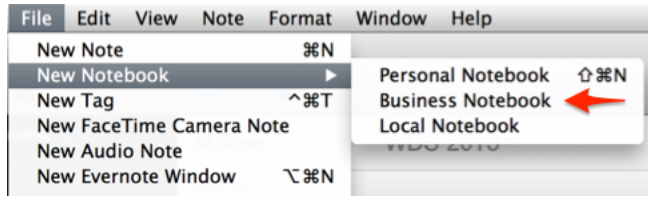
The difference between a Business Notebook and the other two types is simple: Business notebooks—and the data they contain—belong to the business, not the user.

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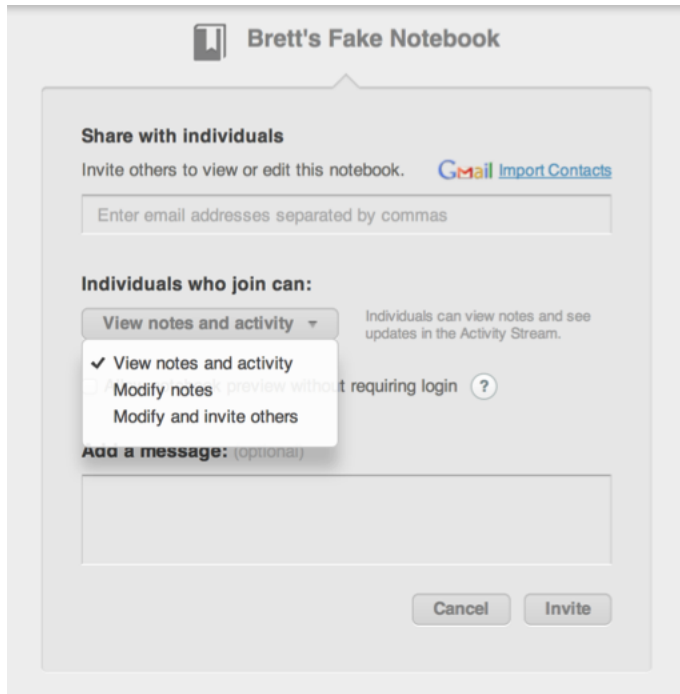
Enter an optional message to the recipient if you want to, and send the invitation. Easy peasy, lemon squeezy.

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:
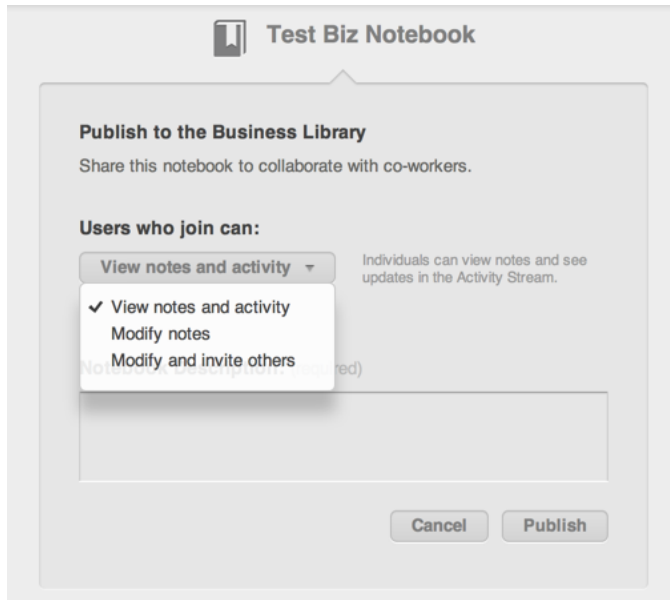
So, what's this "Business Library" thing, you ask? It's pretty straightforward, actually; think of it as a directory of notebooks that employees of the business have seen fit to make available to everybody in the organization. Click the Business Library icon and you'll be presented with a lovely grid 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.

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[1] 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.

[2] 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 <u>Evernote Business Resource Page</u>.

Importing and 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:
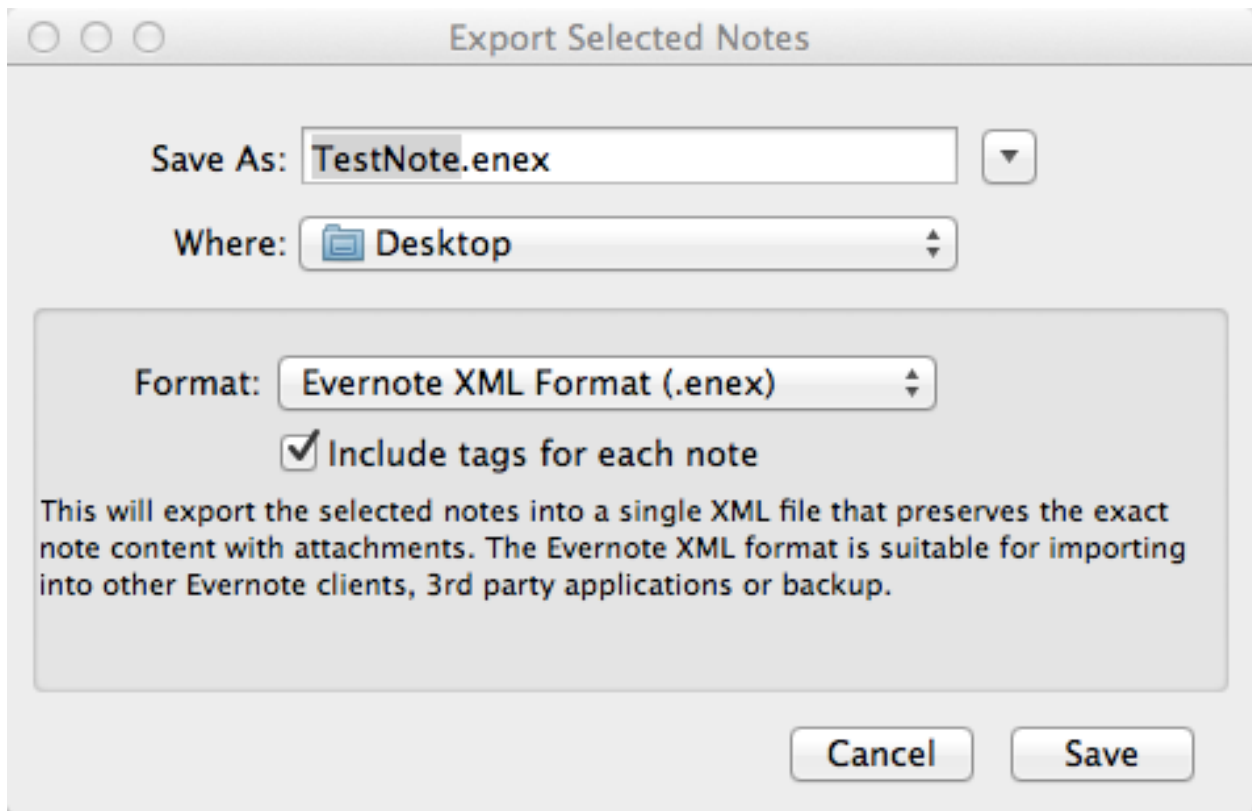
(You'll almost certainly want to choose ENEX as the format.)

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.

With OS X El Capitan and iOS 9, Apple dramatically revamped the Notes app available on their devices: it can now handle various types of media, including images and PDFs, and allows syncing through the iCloud service. More than a few nerds I know have abandoned Evernote in favor of Apple Notes (not me, for the record) and it would appear that the upcoming 10.11.4 update to OS X will include a version of Notes capable of importing ENEX files generated by Evernote.

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? Mkay.
- 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 Evernote and its various capabilities, but I'm *way* better at teaching than I am at doing.[1]

That said, let's take a tour[2] of my Evernote account.

Stats

I currently have about 16,000 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 used to work for Evernote and they use the pudding out of Evernote at Evernote. Many of my notes and notebooks are related to my former job. Consider this the first of several warts we're going to encounter: I don't take much time to clear out old information that isn't of much use any longer.
2. I've been using Evernote, both personally and professionally, since it first showed up on the scene about eight years ago.

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 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 tend that way when it comes to paper.

Project resources

As an adherent to the [GTD](#) productivity philosophy, my daily life is driven by projects.[3] 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 years 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, my task manager of choice.
- One of my job functions at Evernote was to write documentation for their Developer website (where programmers can learn how to build applications that work with Evernote). I had an Evernote Business notebook dedicated to brainstorms and other ideas for things that I should write for the site. My coworkers also had 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 (ten and eight 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 cards they've made for 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 Apple's iCloud Photo Library, but the special ones end up in Evernote because of the date/location information embedded in the note.

Financial and medical records

As I'll explain a bit later 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. When I worked for Evernote, I would travel to the company's headquarters a few times per year and whenever I created a new note to make a list of what to bring with me, my past packing lists would show up as related notes. Then, I would just click over to one of those and quickly review it to make sure my current packing list wasn't missing anything.[4]

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.

Here are a few other examples:

- Ad-hoc shopping lists; if I'm preparing a meal for several friends—something I do regularly and quite enjoy—while reading the recipes, I'll sometimes bust out my iPhone and record a list of ingredients in Evernote, then pop on over to the local grocery store.
- The name and address of a restaurant (or something) that I may be visiting at some point.
- A process for fixing something; as a guy who runs his own business, I wear many hats. Sometimes I get caught up in all of the myriad details of running things and, when a problem arises, I'll open Evernote and roughly plan how to get from where I am to "things are working again." Apologizing to somebody is usually the first item on this list.

That sort of thing. Since I pay for Evernote Premium, I have an enormous amount of space at my disposal and, given that I can jump to Evernote in a single keystroke and start typing, that's exactly what I do most of the time (even if the data will be worthless in an hour).

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 **brettkelly.org**, 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 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. **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 Skitches** is the notebook where I sync everything I do in Skitch. **Penultimate** is where all of my content created with Penultimate[5] 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 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 applications[6] 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
```

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 used to be an *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"[7] 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.

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[1] 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.

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

[3] 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 the project is finished.

[4] 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.

[5] Penultimate is an iPad application whose parent company was acquired by Evernote in 2012.

[6] 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.

[7] 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 spanking 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 car[1] 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 permanent[2] home.

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.

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[1] 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.

[2] For now, anyway.

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, 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.

Kidding aside, really, truly: if you don't have access to your phone or one of these backup codes, you will not be able to sign into Evernote.

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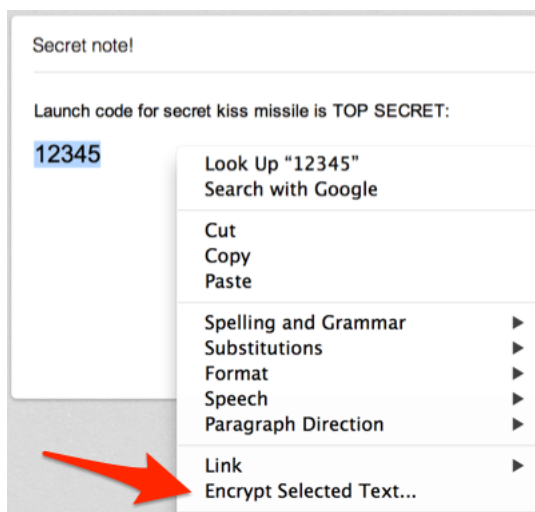
You'll be asked for a passphrase that you can later use to decrypt this text. Please realize that if you encrypt a piece of text and forget the passphrase, it's as good as deleted. Neither the Evernote system nor staff has any way of recovering your encrypted data, so be very careful to either use a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

It will surprise literally nobody to learn that I do the bulk of my planning in Evernote.

Everything from a birthday party and moving into a new home to planning a birthday party for my lady and creating several new products. I've even planned and built two entirely new *businesses* with Evernote as my base of operations.

You have something in mind? Evernote can handle it, trust me.

Your project could be anything: buy a new car, plan a holiday meal, take a vacation, build a bookshelf—you name it.

Let's say, for the sake of argument, your project is to buy and install a billiard table in your house. It really could be anything, though.

Create a new notebook in Evernote called "Billiard Table." We're going to fill that thing up here in a second.

First, some guiding principles.

Planning and executing a project involves four discrete steps:

1. List your requirements and, if applicable, relevant constraints
2. Gather the necessary information and resources
3. Map out the steps to complete the project
4. Perform the steps

Using our billiard table example, let's quickly figure out what our

requirements and constraints might be. Create a new note in Evernote called "Requirements and Constraints" because that's where all this stuff is going to live.

Requirements might be:

- Must fit within a 14' by 16' room
- Wood grain, felt color, and accents should match the rest of the room decor
- Need electrical wiring above the table so we can have one of those super cool hanging lamps (shadows on a billiard table are bad news)
- Need a blank section of wall to hang the cue stand

(This is off the top of my head, so please don't email me if you're a billiard table merchant and I'm way off-base here.)

For constraints, these might be applicable:

- [Partner] hates the standard green felt color, so pick something different
- Cost should be less than $2,000
- Needs to be installed in less than a month (in preparation for a family reunion)

The resulting note would look something like this:

Requirements

- Must fit within a 14' by 16' room
- Wood grain, felt color, and accents should match the rest of the room decor
- Need electrical wiring above the table so we can have one of those super cool hanging lamps (shadows on a billiard table are bad news)
- Need a blank section of wall to hang the cue stand
-

Constraints

- [Partner] hates the standard green felt color, so pick something different
- Cost should be less than $2,000
- Needs to be installed in less than a month (in preparation for a family reunion)

These are a good start, but this is a fluid document. As we move through the project, other requirements and constraints will certainly emerge and we'll add them to the list as we encounter them.

Next, let's talk about resources.

After doing some research, we can assume that, at minimum, we'll need the following:

＊ A company that sells billiard tables (and that allows us to customize the felt color, wood color, etc.)
＊ A company that installs and balances billiard tables; this may be the same company as the seller, but maybe not
＊ A company that sells those fancy pool table lamps
＊ An electrician to install both the lamp and the wiring for the lamp
＊ A company that sells pool cues and cue stands

Create a new note called "Resources." Here, you'll list each of the above items.

(As with our requirements and constraints, this document may grow as we progress through this project. Feel free to add to or modify this list as needed.)

Researching these vendors will hopefully yield a few results for each. As you collect information about each company, stick the relevant info into **its own Evernote note**. Then, tag it with the related requirement.

For example, if we get on the horn with Eddie's Billiard Tables and find out that they can sell us a table within our budget, make a note of their contact info, the price you were quoted, etc. and add it to a note. Tag the note with "table" (or whatever you want).

If you speak to Jeannie at Jeannie's Billiard Lamp Depot and learn that she has a super fancy billiard table lamp that you like, add all of the details to a new note and tag it with "lamp."

As you find various outfits to hire to complete this project, jump back to the main Resources note and add links to the vendor notes you've created along the way. You can do this easily using the "Copy Note Link" feature. You're creating something of an index for the project here, which will make jumping to various notes in the notebook much simpler.

When you're done, it'll look something like this:

Resources

Billiard Table Vendor(s)

- Billy's Billiard Table Emporium
- Eddie's Billiard Tables (also sell lamps! and accessories!)
- Susan's House O' Billiards

Lamp/Accessory Vendors

- Jeannie's Billiard Lamp Depot

Billiard Table Installers

- Billiard Installation Wizards, Inc.
- Table Toppers Installation Service

Electricians

- Genevieve's Electrical

At this point, we've figured out what we need and found a few places who can get us that stuff. Full steam ahead!

Now, it's time to actually do the work. In this example, we're mostly going to hire the work out instead of doing it ourselves, but the same principles apply: figure out the next thing, then do it.

Now, create a note called "Tasks." Here's where we map out all of the steps from here to done:

- Call Eddie and order the table with our desired options and customizations. Make sure to get a firm delivery date so you know how

much time you have to complete the rest of the task list.

- Call your electrician and confirm they're available to install the lamp before the table is due to be delivered.
- Call Jeannie and order the lamp. Make sure the lamp will be delivered in time for the electrician to install it.
- Order your pool cues, balls, and wall rack. Having these before the table is delivered isn't necessarily *required*, but it'd be a pretty big bummer to have a sweet new billiard table and lack the tools needed to enjoy it.
- Arrange for somebody—either you or a vendor—to thoroughly clean the carpet before the pool table is installed.

Something like this:

Tasks

☐ Call Eddie and order the sweet new billiard table (info: Eddie's Billiard Tables)
☐ Call Jeannie and order the lamp and accessories (info: Jeannie's Billiard Lamp Depot)
☐ Call Genevieve and schedule electrical work (info: Genevieve's Electrical)
☐ Check Yelp for a good carpet cleaner|

Plus, you know, anything else that comes up along the way. Next to each of these tasks, link to the note containing the vendor information so you can quickly jump to it if needed.

Then, you get to work. Start at the top and move through the list of tasks until everything is scheduled or completed.

The power in using Evernote for planning and organizing like this manifests itself in two ways:

- The project details are in one place that's always with you: phone, tablet, computer.
- The project details and progress are available to whoever else need to see them (via sharing)

Going through the steps outlined above—while using Evernote as your home base—will make executing on a project simpler and, especially if you're collaborating, with reduced friction.

Use Case: Build the Ultimate Recipe Book

While technically optional, this is one use case where tagging really is worth the extra trouble.

You save—or create—recipes from wherever. My theory is that you'll be building your recipe book using one or more of four possible sources:

1. The Internet
2. Family recipes
3. Magazines
4. Your own inventive brain

If the source of the recipe matters to you, then you'll want to take advantage of two available metadata fields provided by Evernote: author and source.

Say your Uncle Hubert made an award-winning bolganese and you managed to get your hands on the recipe. To make sure ol' Hubert's name is attached to the recipe, you can add it to the author field thusly:

Title	Uncle Hubert's Amazing Bolganese
Notebook	Recipe Book ⌄
Tags	click to add tags
Created	April 4, 2017 at 10:47 AM
Updated	April 6, 2017 at 10:48 AM
URL	click to set URL
Location	▓▓▓ ▓▓▓ ▓ ▓▓ ▓ ▓▓▓ ▓▓▓ ▓▓▓
Sync Status	Synced just now
Image Status	No images to index
Size	124 bytes
Author	Uncle Hubert
History	View History

Or you could just call the note "Uncle Hubert's Boglanese" if you'd prefer. Though, using the author field here allows you to do more with search (since you can use the `author` search operator to find some or all of his recipes).

If you find your recipes online and you use the web clipper to capture them—I'm assuming this is how most of your recipes end up in Evernote—then the clipper will grab the URL of the recipe during the clipping process and stick it into the source field. Just like with `author`, you can search your recipes by URL using the `sourceUrl` operator.

Using either of this fields isn't required, of course, but if you're picky about having well-organized, complete information, they add an extra pinch of elegance.

When you're deciding how to organize your recipes—or anything, really—the primary goal is having the ability to find what you're looking for quickly. No surprise there. So, how can we make our recipe book easily sifted-through?

Tags, baby. Three types, particular:

1. Ingredients
2. Preparation time
3. General cuisine category

Let's start with ingredients.

"So, what, I'm supposed to tag my chocolate chip cookie recipe with each of the eight ingredients? Are you high?"

No, that's not what I'm saying. Relax and let me explain.

Tagging your recipes with the **primary** ingredient(s)—like a given protein or vegetable—would make it trivially easy to whittle your recipes down to show only what you have on hand.

Example: say you have some chicken in the fridge. You also have some potatoes. If you jump over to Evernote and search for `tag:i-potatoes` and `tag:i-chicken`, you'll see a list of recipes containing both of those primary ingredients (assuming you applied those tags in the first place).

Consider tagging your recipes with the primary ingredients when you add the recipes to Evernote. The `i-` convention is what I use so I can differentiate

potatoes generally from potatoes-as-ingredient.[1]

Second: preparation time. A meal that must spend eight hours in a slow cooker isn't really an option when you need to have dinner on the table in 90 minutes. If you know how much time you have available to cook, embedding the amount of time a given dish takes to prepare is a valuable addition to the recipe.

Example!

If Chicken Genovese takes an hour to prepare, consider tagging the recipe note with `p-60` ('p' for preparation, 60 for the number of minutes necessary to prepare it). For your standard slow cooker shredded chicken, you might tag it with `p-480` (8 hours in the slow cooker). You get the idea.

Finally—and this is an optional step, for sure—is tagging based on cuisine. Mostly, this would make browsing a large recipe collection simpler. Being able to quickly say "show me all of the Mexican dishes containing chicken that take 2 hours to make" could be helpful if you're staring down the barrel of 300 candidate recipes.

Assuming you applied the tags to your recipes as described in this chapter, a search using the above criteria would look like this:

```
tag:p-120 tag:i-chicken tag:Mexican
```

Other ideas, quick and dirty:

- Design a tag-based rating system (e.g., `r-4`) so you can record how much a particular dish tickled your fancy.
- Create a shared notebook so you and your foodie pals can contribute to a community recipe book (just make sure those crazies adopt the same

tagging convention).

- Take photos of the food you prepare and add them to the recipe notebook so you can see how it turned out relative to the likely-doctored image that came with the recipe.
- Create a section for modifications. For instance, if you tried to make the dish and it came out overdone, make a note to try reducing the time in the oven next time. And if any recipe only calls for one clove of garlic, you should reflexively double it (and add a dash of cayenne pepper—trust me on this).

Flexibility is one of Evernote's strengths. The above strategy is just one way to do it. Figure out what your needs are and build a custom solution that works for you.

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[1] You know, so you can distinguish between articles you clipped about how to grow potatoes vs. recipes containing potatoes.

Use Case: Create Your Personal Operations Manual

Starting a new job means learning lots of new things. Oftentimes, you'll be presented with the "company handbook" during orientation or on your first day. Some of you may remember this experience. You leaf through the content—either a physical book of pages or a digital document—and learn all sorts of policies and procedures covering everything from the company health plan to what to do if your boss calls you names.

These resources are designed to solve the "what do I do now?" problem. Guides like these generally start small and grow over time to account for new challenges or problems faced by a business, either internally or externally.

Evernote is a fantastic place to create one of these manuals for your personal life (and, if applicable, collaborate on it with other people like your spouse/partner).

Let's look at some specific ways this is useful...

Medical

"What happens if I slice my hand open on the mandolin?"

Having a single home for your basic medical coverage information is incredibly useful when you're prodigiously bleeding into the bathroom sink. Some facts worth including:

- The name of the closest emergency care facility that accepts your

insurance
- The name of your primary care doctor
- Your blood type (and the blood types of your kids, if applicable)
- Your health insurance carrier name, policy number, and contact information

Etc., etc. These are things you can probably find out easily enough, but rifling through filing cabinets and overstuffed wallets is difficult with one hand.

Having this information available to give to others can be useful, as well. Say little Johnny is going to stay with his Uncle for a couple of weeks during the summer. Sticking his medical insurance information into his backpack will save a ton of time and panic if Uncle needs to get medical attention for Johnny unexpectedly.

This list can be as extensive as you like. Food allergies, medications you're taking (or have previously taken), and so forth.

Financial

You probably have a bank account. If you're an adult, chances are you have more than one or maybe several.

A single document containing all of your bank accounts can be a useful resource for you and your loved ones. Specific information to include:

- Bank/institution name
- Account number
- Account type (savings, investment, etc.)
- Account purpose, if applicable (Johnny's college fund, new Miata fund, etc.)

Ditto for credit cards. Include things like spending limit, interest rate, and so forth.

Additionally, any processes by which money is moved between accounts would be useful here. Things like:

- Direct deposit schedules
- Monthly processes for transferring money to a savings or retirement account (whether automatically or manually)
- Automatic withdrawals by creditors (and the date they occur)

Another (somewhat dark) example:

My immediate family has a list of exactly who to call if, by some freak accident, I die unexpectedly. Reason being, a good amount of legal and financial machinery will kick in at that hypothetical moment and the advisors who understand the intricacies of these processes will be extremely helpful to those close to me.

Household stuff

If the water filter in your fridge or sink were to suddenly crap out, do you know the model number and manufacturer so you can quickly procure a replacement? Do you know where to buy it?

We all have appliances and tools around the house with moving parts that will, at some point, break. Perhaps, they'll break catastrophically. This kind of info is also incredibly useful to have on hand:

- Make/model of your major appliances (dishwashers, air conditioners, washing machine, etc.)
- Part numbers for things that require regular replacement (filters, gaskets,

and so on)
- Physical retailers or online stores that carry the replacement parts
- Service companies that you'll need to call if your air conditioner explodes or your basement has six inches of water on the floor
- Warranty information for anything that has a warranty, including phone numbers to call to get warranty service
- Manuals for your various appliances and tools (hint: searching Google for "\[make and model of product] PDF manual" will probably give you a digital version of what you're looking for)

Car stuff

(You're probably getting the idea by now, but let's do just this one more.)

"What kind of oil do you want to use?"

Ever been asked that at an oil change place? So have I. Add that to the list, along with:

* Your roadside assistance phone number and membership information
* Contact information for your mechanic
* Insurance information (a copy of your current policy is better than the ID card that you're required to have in the car)
* Links to Amazon (or wherever) for replacement air filters, cabin filters, and so forth. These things are marked-up a ton at the Jiffy Lube and it's much less expensive to buy and install them yourself.

The Brass Tacks

Successful use of this system requires two steps:

1. Taking the time to collect all of the data necessary to create it

2. Updating and maintaining it when things change

Everybody's life is different, so only you know which information to include here.

As far as Evernote is concerned, I can definitely help with that part:

One notebook (if you can)

If possible, collect all of this stuff in one notebook. If you have an extensive collection of digital user manuals or other large files, splitting those out into a separate notebook is fine.

Remember, this is designed to be used for reference. It need not be a exhaustive. Potentially, this will be something you need to access and sort through quickly, so keep that in mind.

Some notes everybody should have (again, add more as you see fit):

- Emergency Medical Info
- Emergency Dental Info
- Emergency Auto Info
- Emergency Home Info (repair services, insurance info, etc.)
- Financial Overview

Then, share it with whomever could need access to it. Even temporarily sharing it with relatives or neighbors while you're on a road trip is a good idea.

This is a framework

In reading this, I hope you've thought of additional ways this idea could serve you and your family. All I'm prescribing here is an example of how to implement

this—the best thing you can do is have an honest conversation with yourself (and other family members) about how important these documents are and what, specifically, they should contain.

Of course, the real boon here is that everybody with access to this information will have *constant* access to it, no matter where they are. Far better than a sheet of paper hung by magnet on the refrigerator.

Use Case: Evernote for Travel Junkies

Back when I worked for Evernote—and since I worked from home—I made regular trips to Northern California to remind everybody at Evernote that I still worked 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 were carefully documented in Evernote before I order even a single Gin and Tonic at the airport bar.[1]

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). I do this with my iPad and it works a treat.

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.[2]

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 family 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

Of course it's perfectly reasonable to put all of the above travel information in a single note. Maybe alongside your fancy packing list, too.

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 used when I was with Evernote and it worked 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 (the now-defunct [Evernote Food](#) was awesome for this and I'm super sad it's gone). 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 check the note's location on a map and have an idea how to get back there.

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!

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[1] I'm a whiskey gal, actually.

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

Use Case: Evernote for Parents

As I mentioned earlier, I have a couple of children that I've come to really like.[1] 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

Growing up before the era of ubiquitous digital cameras and smart phones, most photos of a young me were shot with 35mm film and developed by a pimply kid at a low-rent photo processing kiosk. If we're lucky, the photos that survived until today *might* have the date in orange numbers in a lower corner (or maybe the year scrawled on the back).

Times have changed and, I'm glad to say that not only do I have *thousands* of pictures of my children, but thanks to fancy tech like Evernote, I know *when* each of them was taken.

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 Plus or 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 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. Mine two are nearing the end of this season of their lives, but it wasn't uncommon for them, in a given week, to excitedly deliver drawings to my desk. As much as I love my kids, most of their drawings weren'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:
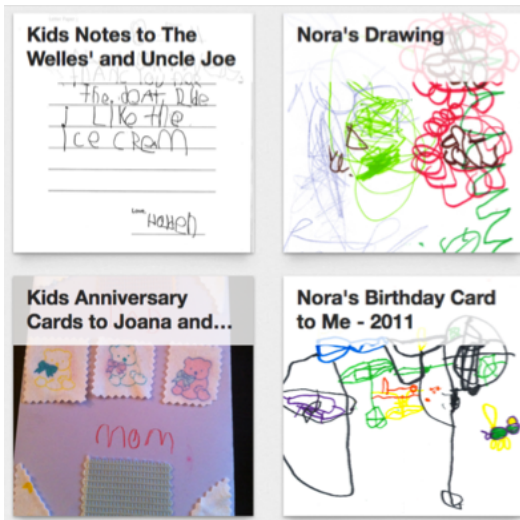
If one drawing turns out to be particularly good (or I just like it a lot), it may earn a coveted spot on my office wall for awhile. Otherwise—and I refuse to feel bad about this—it gets quietly tossed in the trash. Don't judge me.

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.

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[1] We're even thinking about keeping them!

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 considering 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 probably 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 six years now and I'm probably going to instruct my kids 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.

You might be reading this thinking, "buddy, I'm not chumping out that kind of cheddar for a document scanner — what else you got?"

Mobile Scanning

Thanks to some remarkable jumps in mobile phone camera technology,
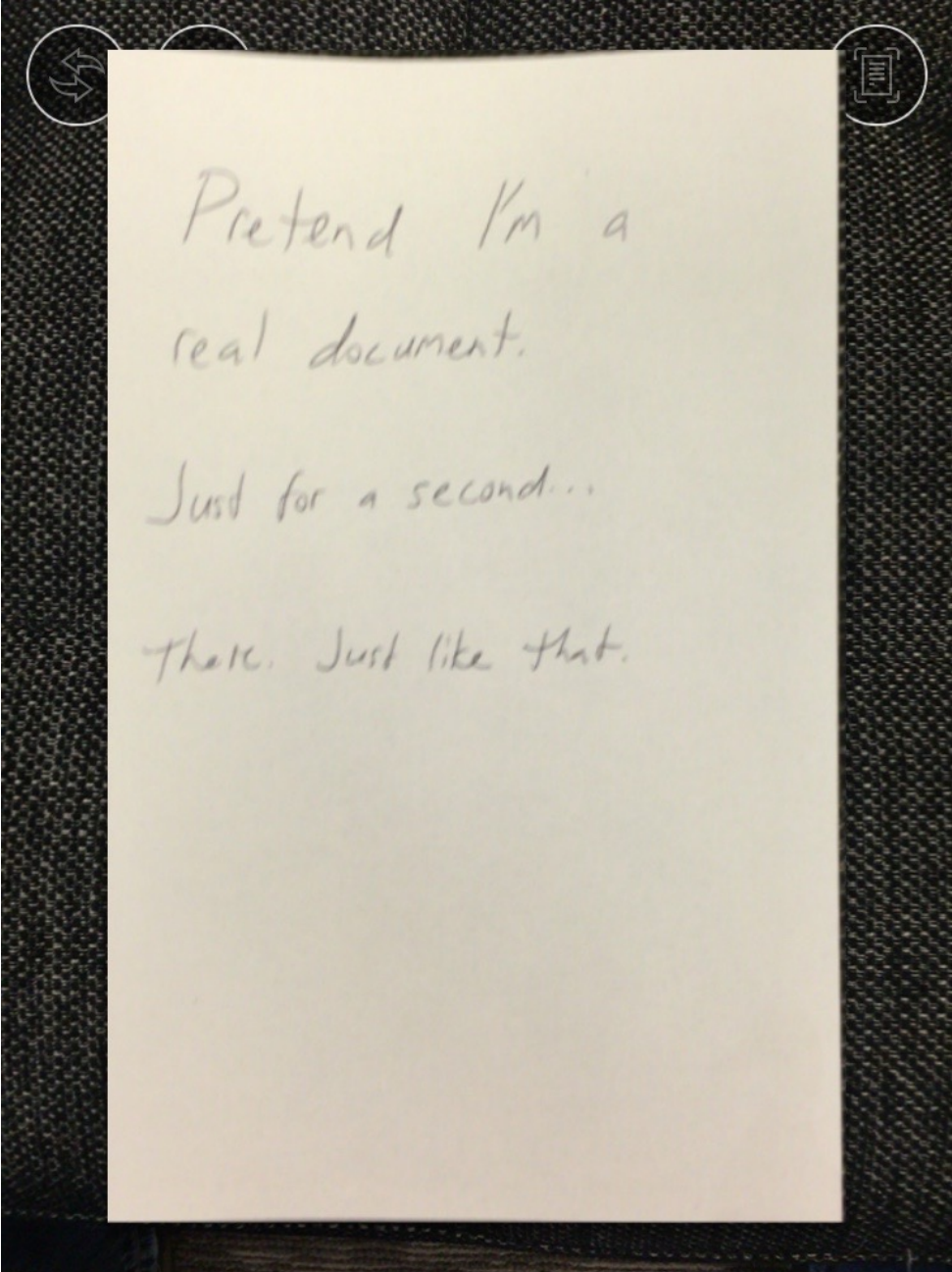
there's a *slew* of apps that can turn your smart phone into a document scanner. Be aware, though: scanning with a mobile phone camera is, in my opinion, a clunky endeavor. If your "To Scan" stack is an inch think, you're going to quickly lose both your mind and your weekend scanning it all with a phone.

Having said that, scanning apps work great when you're out and about or need to scan a document quickly.

Evernote's iOS and Android apps both let you take photos in "Document" mode, which will attempt to locate a rectangular shape in the frame, isolate it, and capture it. Here's how it looks on Android:

Place document on contrasting
background for better results

DOCUMENT   CAMERA   POS
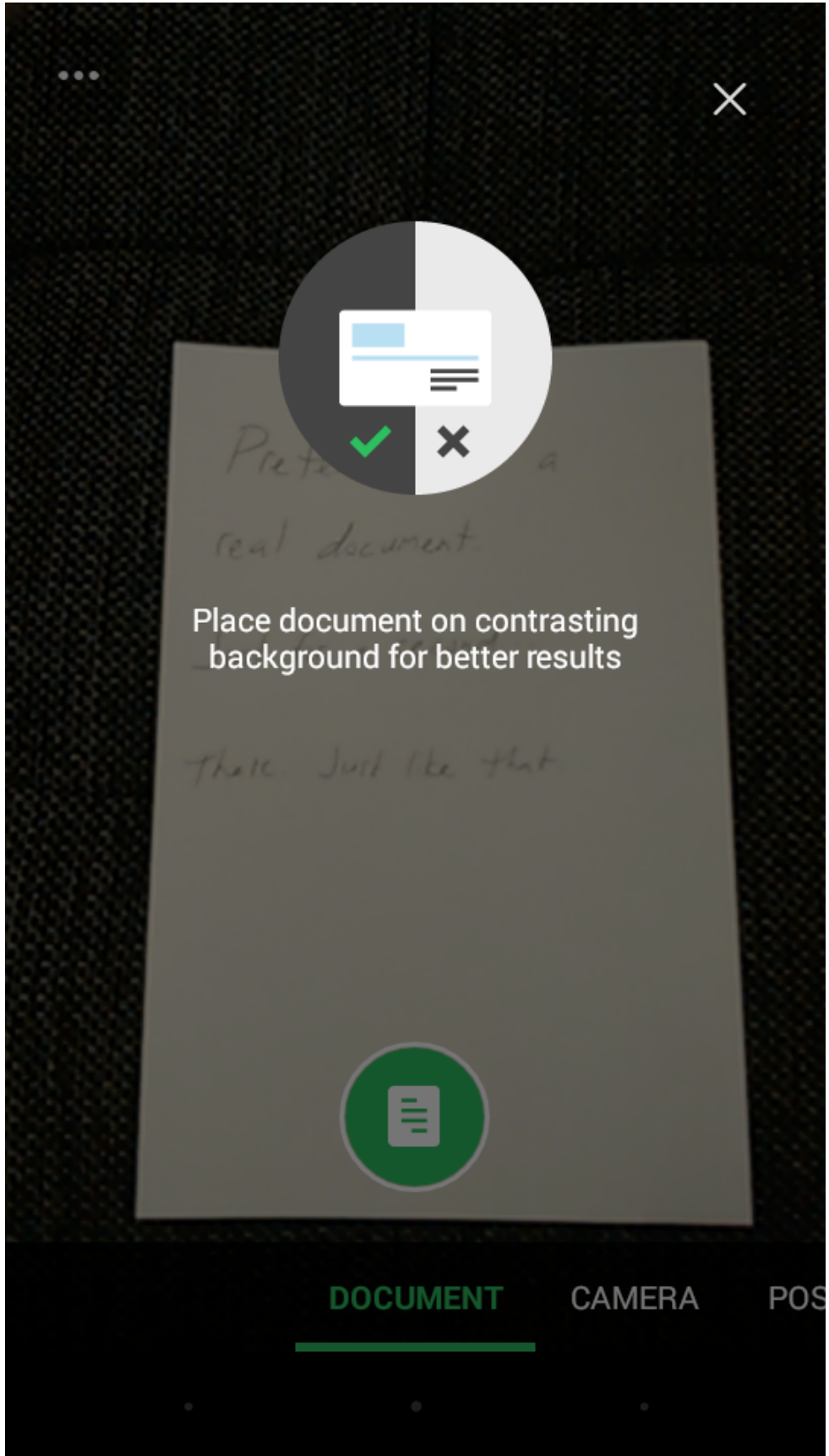
And on iOS:

Pretend I'm a
real document.

Just for a second...

There. Just like that.

Place documents on a contrasting background.

Cancel   Save

If the Android capture looks a whole lot worse, that's probably because my Android device—which I purchased for the sole purpose of covering it here in Evernote Essentials—is both old and cheap. I'm sure a more modern, better-constructed Android phone would take much better pictures than this little jewel I've got here.[1] For the iOS capture, I used my everyday carry iPhone 6 (which is over a year old as I type this).

Neither of these apps provide much in the way of configuration when it comes to this scanning business. Scanned documents are stored as PNG images, whether you like it or not. Capturing multiple pages will result in a note containing each page as a separate image file. The quality of your scans will depend on the quality of your phone's camera and internals.

Evernote themselves make an iOS app called [Scannable](#) and it works surprisingly well. The experience is similar to the scanning functionality of the Evernote app, but with greater flexibility in terms of file types (PDF and PNG are both options instead of just PNG, which I like a lot). Scannable also lets you share the scanned document with several different applications using both built-in sharing options as well as the iOS Share Sheet. Finally, Scannable allows you to quickly rename the note where the scan will be stored instead of using whatever Evernote is configured to use as the default.

If you're wondering, Scannable is my go-to scanning app on my iPhone (and it's free).

If none of these scanning apps are ringing your bell, take a look at the [Paperless section of the Evernote App Center](#) for other options.

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 "2016-02-25 :: 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 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:2016
```

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 "2016" 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.[2] 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 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.

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[1] It's a Moto E I picked up from Amazon for about $100 (out the door, without contract). In case you were wondering.

[2] Unless you decide to enable that two-step verification we discussed in the Security chapter.

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. The IFTTT folks call these "recipes." 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. [This page](#) shows popular Evernote recipes and would be a fantastic jumping-off point for new users.

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
- A bunch of other stuff

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 way under 200mb, 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 eight 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 couple of years 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.
- 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.

Use Case: Evernote for Awesome Boyfriends

Author's note: since this chapter was written, I went ahead and married the girlfriend mentioned below. You can see a handful of pictures of us in the [Beer with Brett Facebook Group](#), if you're interested in some casual interaction with your humble host.

I have a girlfriend and she's awesome. I try to take good care of her and make her feel special (because she is).

One of the ways I do that is by being thoughtful and considerate. Her enjoying this won't surprise anybody. Who doesn't love feeling like their significant other knows what they like and pays attention to them? Nobody, that's who.

Tending naturally toward being thoughful is all well and good, but I need a sidekick. My brain is pretty good at thinking through problems, but it's alarmingly bad at reminding me of things when I need to remember them.

Deputizing Evernote for this task didn't take long and, as of now, I've used it in several different ways to earn the coveted "most awesome boyfriend" title...

Build a Dossier

Since before we started officially dating, I've been keeping a running list of facts about my lady. Most of these tidbits are things she mentioned offhand in casual, often unrelated, conversation. Examples:

- She loves chocolate
- Her favorite fruit is pineapple and she doesn't much care for apples or grapes (she ate them a lot growing up and would happily choose something different these days)

- She'd like to visit a handful of foreign countries
- She prefers pizza with thick crust
- Cookies that are crunchy or hard on the bottom may as well end up in the garbage as far as she's concerned.
- Her dress, pants, shirt, and shoe sizes (I asked about those — I'm not a creep) and the types of clothes she likes to wear.

I could go on, but you get the idea.

The process is easy: I created a Stack in my account, named for her, which contains a couple of notebooks. The main notebook is where the dossier lives, as well as a few other notes.

Whenever I hear or observe something that seems worth remembering, I fire up my phone and add the new factoid to the end of the dossier note. One way to speed this process up is to create a shortcut to the dossier so I can quickly access it on my phone.

But I've figured out a faster way!

I use a very special iOS app called [Drafts](#) to make this capture quick and super simple. Using a custom action in Drafts, I can quickly type the note and append it to the end of the dossier note with a timestamp.

Armed with the data I've collected about my girl, I can come up with gift ideas for *days*. And I do.

Speaking of...

Build a List of Gift Ideas

This process looks a lot like the dossier building, but it's a bit more about

keeping open eyes than open ears (though, open ears definitely help):

- When I'm at my lady's apartment, I look around for staples of modern life that are in disrepair, totally broken, or just *not there*. We like to cook together, an activity that has generated a good half-dozen gift ideas thus far.
- Out shopping, whether we're together or not, I've got an eye out for things she might like. If we're together, it'll be things she mentions or shows interest in (e.g., if she picks up a shirt).

These gifts don't need to be expensive. One thing I've learned about this girl —and it's probably a safe assumption about many people—is that she appreciates a thoughful gift more than an extravagent one.

Case-in-point: her Mother's Day gift was a set of plastic measuring cups. Why? Because her one-cup measuring cup went missing awhile back and she didn't have one. So I picked out a set that matched her standing mixer and the curtain in the kitchen. Because she mentioned that she likes things that match the curtain — and I surreptitiously took note of that shortly after she said it.

See how all this works?

The benefits are probably starting to emerge by now: I have a list of thoughful gift ideas at the ready, no matter when I need them. And she's happy as a clam because she knows her goofy boyfriend really listens and pays attention. And when she's happy, I'm happy.

As for the actual capture, I have a "Gift Ideas" notebook in Evernote where I have running lists for lots of people including my mom, each of my kids, and, of course, my special lady. Each person has their own note in this notebook and, like with the dossier above, I just append gift ideas to the end of the correct note

when a gift idea occurs to me.

This process is *wicked* fast using Drafts, and it works for multiple people:

- Launch Drafts and type the gift idea (e.g., "red dress," "tea cozy shaped like Big Ben," etc.).
- Run the "Save Gift Idea" action; this presents me with a list of names, each corresponding to a note in the "Gift Ideas" notebook.
- Tap the name of the intended recipient, wait a second for the note to be updated, then go back to painting my toenails because that's it.

Using on my iPhone, Drafts, and my beloved Evernote, I have compiled several gift lists for various people including each of my kids, my mom, brother, sister-in-law, and my lady's parents. It takes a couple of seconds to set up and all I need to do after that is pay attention and take note when things come up.

Speaking of gifts...

Mini Case Study: Epic Birthday Feast

My aforementioned girlfriend had a birthday recently. I've also spent the last year or so slowly learning how to cook. So, I decided to cook a huge-to-me (mostly) Mexican meal for us and some friends. And I used Evernote to plan and execute what was—for me, at any rate—a rather large undertaking.

Here's how I did it—and, of equal importance, how I'll always remember it—using a single Evernote note. Bonus: I'll link to the actual Evernote note at the end of this chapter so you can see it in action.

First, I made a list of everything I was going to cook (six discrete items, total):

1. Carne asada (marinated)
2. Grilled vegetables (also marinated)
3. Homemade corn tortillas
4. Mexican rice
5. Corn cake (that relish-looking ball of sweet corn you get at some Mexican places)
6. Strawberry hand pies with homemade whipped cream for dessert (these look vaguely like empanadas; imagine a small strawberry pie folded in half)
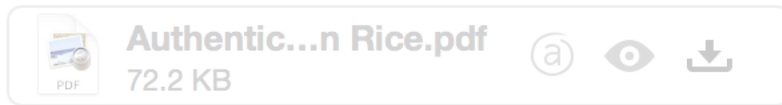
Pinterest is a great place for finding recipes—cooking is the only real reason I use it—so I took my list of items and found recipes for the items that required them (the veggie marinade and the tortillas were prepared with friendly instruction and a recipe simple enough to memorize, respectively).

Here's how the whole thing went down, starting two days before the fiesta...

Friday (Party Day - 2)

For each recipe, I visited the web page and found the printable version—which gets rid of the 1200 words of meandering anecdote and dozens of ads leaving only the ingredients list and preparation instructions. I saved each of these as a PDF, then dragged them into the note. Since Evernote for Mac displays PDFs "inline" by default, I switched them to attachment view so they didn't clutter up the note whilst I worked. I also linked back to the original recipe found on the web in case something went south. The list of PDFs looked like this when I was finished:
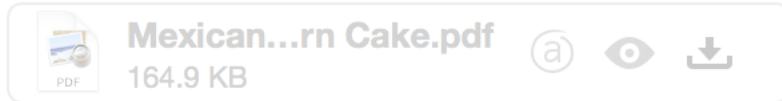
[Mexican Rice](): (double this recipe)

| PDF | Authentic…n Rice.pdf
72.2 KB | ⓐ | 👁 | ⬇ |

[Carne Asada Marinade]() (double):

| PDF | Best Carn…a Diet-.pdf
106.7 KB | ⓐ | 👁 | ⬇ |

[Mexican corn cake]() (double):

| PDF | Mexican…rn Cake.pdf
164.9 KB | ⓐ | 👁 | ⬇ |

[Strawberry hand pies]() (double):

| PDF | unnamed…cument.pdf
78.0 KB | ⓐ | 👁 | ⬇ |
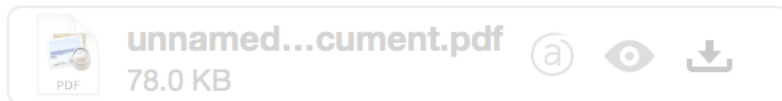
Next, I perused each recipe for ingredients. Many of the required ingredients were already present in the cupboard, so I needed only to list those I needed to buy (obviously). Since I was shooting for something resembling authentic Mexican fare, I would need to procure some hard-to-find ingredients from a local Mexican market. My corner grocery store would provide the other, more accessible ingredients.

So, I made a simple list of checkboxes in the note, one for each ingredient I needed to buy (and how much of it I would need). For some ingredients, I was unsure which store would carry them, so I added them to both lists so I wouldn't need to worry about modifying the list on my phone while standing in the

produce aisle.

Finally, I examined the prep and cook times for each item to see what I could reasonably make, or at least prepare to make, beforehand. I have my kids with me on weekends and we usually have a moderately full schedule of activities, so I needed to plan with timing and availability in mind.

At the end of Friday, I had a huge list of ingredients nested beneath the store where I'd buy them, along with a rough list of tasks and when they needed to be completed.

Saturday (Party Day - 1)

After spending the morning procuring all of the ingredients, I set to work on the marinades for the meat and veggies. Took a couple of hours to get everything dialed, but I got the veggies cut and cleaned, and threw everything into big zipper bags to marinate in the refrigerator until the next day (checking each task off as I went, of course).

Sunday (Party Day)

The party would begin around 3:30 in the afternoon and I had a *lot* to do. Luckily, each task was listed, in order, in Evernote. After arriving home from church, I opened Evernote on my iPad, browsed to the note, and I got busy. I was able to enlist some help from giving friends who showed up early to help me make everything.

It went off without much of a hitch. The corn cake was a little underdone and the rice was a little mushy, but the response was uniformly good and my lady was very pleased.

How I'll remember

None of this is terribly earth-shattering so far, I'll admit. Anybody with a pen and paper could easily do what I've described without needing a fancy piece of productivity software. Stipulated.

However...

The real magic here is the memory I created. You see, as the meal was being prepared and enjoyed, I was taking pictures of the food and the people. Shortly after the event, I grabbed a few photos of the food and the company and dropped them at the bottom of the same Evernote note I used to plan the party.

And, as promised, I've made the note public so you can peruse it in its entirety. You can view it here.

Now, I have a soup-to-nuts memory full of *real details*. This is important, I think. So often, we rely on small cues—a picture on the wall, a ticket stub, or what have you—to jog our memories. Mementos like these work well, to be sure, but I've found that the more detail I can shoehorn into the cue, the better my brain is at filling in the details.

A few years from now, I'll probably remember having cooked the rice or a few of the marinade ingredients, but nothing like what this note contains. Now, instead of trying to remember if there was cilatro in the marinade, I'll know for sure and probably remember how good the meat smelled when I took it out to grill it.

So, takeaways here:

1. Evernote is an outstanding place to collect information about your sweetie (or anybody else). Add something like Drafts to the mix and it's blazingly

fast, too.

2. For the gift idea thing, the big hack here is how low-friction it is to capture ideas to Evernote. I don't know about you, but I can't count the number of times I've thought "man, that would be a killer gift idea for [person]," but had nowhere obvious to put it. This solves that problem so elegantly I can barely stop smiling.

3. When your memories live in Evernote, **augment them**. Add photos and details to make it easier for your flesh brain to recall more than traces of what you experienced.

Obviously, all of this stuff applies to more than just boyfriends or even significant others. You're just capturing thoughtful details about people for whom you care — and Evernote makes it easy!

How I use Evernote to make Evernote Essentials

Writing a chapter about how I make these chapters might be a little "meta," but I'm including this chapter for a couple of reasons:

1. How I use Evernote here will, I hope, be a good example of a real-world use case.
2. I pratice what I preach, eat my own dog food, and all the rest of it.

As I mentioned in a previous chapter, I don't do any of the actual *writing* of this book in Evernote. Several initial drafts and edits for the first version were created in Evernote, but I moved on to more suitable tools after that.

(If you like writing in Evernote and it gets the job done for you, then I encourage you to continue doing so. Lots of folks do. My needs for a writing environment extend beyond what Evernote is capable of, so I use other software to write books and such. In other words, I'm not saying writing in Evernote is a bad thing, it's just not my thing. Cool? Cool. Moving on…)

My non-writing work in writing Evernote Essentials—or any long-form project, really—generally falls into four categories. Let's poke around in each one and see what we can see.

Collection

As I write each successive version of this guide, much of the work is directed by reader feedback and my own ideas. As either of these appear on my radar, I add them to a note in the notebook associated with the version I'm working on ("EEv5" in this case). In practice, this works out to be a list of typos or

grammatical errors, questions like "how do you do [thing] in Evernote?" and a *bunch* of half-baked ideas that occur to me while I'm in the shower or something.

When it comes time to produce the next version, I'll collect all of the various bits and pieces that have been lobbed into the notebook over the months and whip them into shape. By the end of it, I'll have a big list of things to both change and create.

It's worth noting here that, during the collection process, I'm not the least bit careful about organizing the information. My EEv5 notebook is in complete disarray, but the number of notes is small enough that I don't need to spend much time cleaning house before the information is useful; a quick scan or search will give me the information I need.

Collection isn't just about the contents of Evernote Essentials, by the way, but we'll get to that in a second…

Planning

Once I've wrung all of the value out of the writing-related information I've collected, I make rough outlines and checklists for the various aspects of writing and selling an information product. It may surprise you to learn that *maybe* half of said lists are devoted to the actual writing process. Selling, marketing, and supporting my product make up the rest.

The checklists usually end up being a little "rough." Things like "Write the chapter on how to turn Evernote into a fine dining companion" and "create a Google Analytics goal for tracking launch sales" to "fix the typo on page *74*, stupid" and "update your headshot so you don't appear to be heavily sedated." Sometimes the tasks are small, sometimes not. I'm not saying this is perfect, but it works for me.

Marketing and Advertising

Many consider marketing to be a bit unsavory (to put it kindly) but this fancy little books and things I make are what put food in my kids' mouths, so I need people to buy them and, a lot of the time, people need to be convinced to spend their money.

Nuts and bolts here: you bought this book by clicking a link at the end of a sales letter (which you may have heard about via an email you received), entered your payment information into a payment form, and received download instructions via email. I didn't build all of that from scratch exactly, but every word you read along the way was written by me. That stuff takes time, let me tell you.

The sales letter is outlined—though, not written—in Evernote, as are the various promotional emails and other textual bits. Any visual assets like photos or graphics are tossed into Evernote as I find them, as well as other advertisements I like; I'll reference these when it comes time to revamp all of the marketing materials needed to launch and sell the product.

Finally, we have promotioanl social media updates and tracking URLs (which contain extra data, called UTM parameters, that let me see where a given person came from, test marketing effectiveness, etc.). Most of the tweets and Facebook updates I publish regarding the stuff I sell are written specifically to encourage people to buy and they include those funky tracking URLs so I can see which, if any, actually work.

Technical Details

I live and die by the automations that run my little business and, as such, there are a lot of computers doing a lot of things on their own. This requires planning. Each time a person clicks a link, opts in to my newsletter, or buys a product, all of the gnomes wake from slumber and begin sending emails, logging

visits, and taking other automated actions.

All of these moving parts are documented in Evernote because it would be quite difficult for me to keep the schematics of this Rube Goldberg machine in my head.

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!

I used to own a television. I'm fairly convinced that the dirt holding up our then-house is newer than this television. It was laughably old. Naturally, the remote control that came in the box with the television is miles deep in a landfill somewhere and we'd 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, my kids were much younger then and the remote manual was gone in very short order, so after one of many times when this decrepit television, I was code-less. Luckily, a buddy of mine happened to remember the code for both the TV and the DVD player. Realizing this situation was likely to happen again, 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.

What Evernote Isn't

While it hasn't been officially recognized by the medical or psychiatric communities—to my knowledge, at least—recent history has given us a new sort of psycological ailment. And, since it hasn't been given a name yet, I'll name it here:

Ultrapachydermiophilosis.

This condition can be reliably diagnosed based on the patient's presenting of a single symptom: the insatiable desire to replace all (or most) of the current software with Evernote. I've seen this hundreds of times. It's a problem.

Joking aside, Evernote is a powerful, versatile piece of software whose uses are practically innumerable. But, it can't do *everything* (even though people really, really wish it could).

Since I got into this racket, folks have been asking me if Evernote could replace their…

- Contact/Address Book application
- Calendar
- Task Manager
- Spreadsheet

And so forth. My answer has generally been some flavor of the following: it might be possible depending on how you use your current solution, but practically, no. The reason is fairly straightforward:

All of the above application categories—and many more—rely on data that

adheres to an accepted structure. Address book applications all know about different field types, for instance: first name, postal code, birthdate, etc. Same with calendars, task managers, and spreadsheets.[1]

While Evernote does support a certain amount of custom metadata in each note (the nerds among you can investigate the optional `applicationData` field, part of the [NoteAttributes struct](#)), it's not visible in the note body and giving the user access to it would require building a custom interface. The body of the note is the wild west. I can paste a picture of a cat, a dozen Word documents, the lyrics to my favorite song and an audio clip of my kid singing it —all in the same note. Evernote did this on purpose so people could put whatever they wanted into the product. Flexibility was the goal.

You might be thinking to yourself, "but sir, there are oodles of people who use Evernote for all sorts of interesting things like task management! What do you have to say about *that*? HMM!?"

Fair point. People use Evernote in myriad different ways and I'm all in favor of everybody doing what works for them. For me, I can't get past the inelegance of it. I tried for many months to create a workable task management system out of Evernote and it worked *okay*, but compared to a dedicated task manager, it was cobbled together with bailing wire and chewing gum.

I certainly understand the impulse to migrate whole chunks of your digital life and work in to Evernote. Heck, I did the same thing early on. But I guess the question I'd like everybody to ask themselves when the pine after an Evernote-based solution to a problem solved by another system or application is this: "how much functionality am I going to have to shoehorn into Evernote to get this to work?"

If the answer is any more than "almost none," I'd reconsider.

This isn't an indictment on Evernote at all; it's a fantastic piece of software that I love and use every single day. And, if you ask me, part of loving something is acknowledging its flaws and limitations.

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[1] I realize task managers only loosely fit into this category, but most of the ones I've encountered all have some implementation of a task name, due date, status, and the like.

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 kids' backs. 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

Things have a way of changing over the course of (almost) six years. Back when I first unleashed this guide on the world in 2010, a lot of people helped me get there. For most of the intervening years, this chapter stayed largely static. Now, though, there are a few others who have definitely earned my gratitude and will be mentioned here.

To my family: Mom and Skip; Jonathan and Michelle; Lindsay and Jared: I don't have the words. I love you.

To the loyal, honorable men who I'm privileged to call friends: Ted, Smitty, Tom, Scoots, Zach, Toph, Chris, Bothwell, Justin, Chubs — you're all my brothers.

To my spiritual fathers: Fr. Blake, Fr. Dart, and Bp. Scarlett. And to all my friends at [St. Matthew's Church](#).

To Ashley for your unwavering kindness, support, and encouragement.

(Mostly-intact acknowledgements from the previous edition)

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.

My good friend Glen Stansberry of lifedev.net never failed to give me the honest feedback and encouragement that I needed to get this thing out the door and I'm in his debt.

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.

Special thanks to Phil Libin and Andrew Sinkov, both formerly of Evernote, for their encouragement and support.

Laurelin Varieur, the coolest English teacher on the planet and a great friend, was instrumental in making sure this thing ended up without errant semicolons and em dashes.

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 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.

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 employed by Evernote Corporation from May 2010 to May 2014.

Know that, while Evernote has been extremely generous in promoting it (mostly in the past), this guide is not an official Evernote product and should not be construed as having any sort of endorsement by Evernote Corporation. 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, in the middle of a tattoo courtesy of my brother, Jonathan. I'm a former software developer, current writer, and tattoo collector from Southern California. I used to work for Evernote, but now I'm an independent writer, entrepreneur and occasional consultant.

Most importantly, I'm a dad to two awesome kids.

When I'm not dropping mad knowledge about Evernote, I enjoy beer, coffee, and whiskey, Apple products, good books, electronic cigarettes, and good conversations. I'm also a formidable Backgammon player and a complete train wreck at a chess board.

If you want to get in touch with me, you can visit my Internet weblog at brettkelly.org. Thanks again for reading.