

# Gaining Your Effective EDGE™ with Evernote

Evernote Best Practices



Whitepaper

Provided by



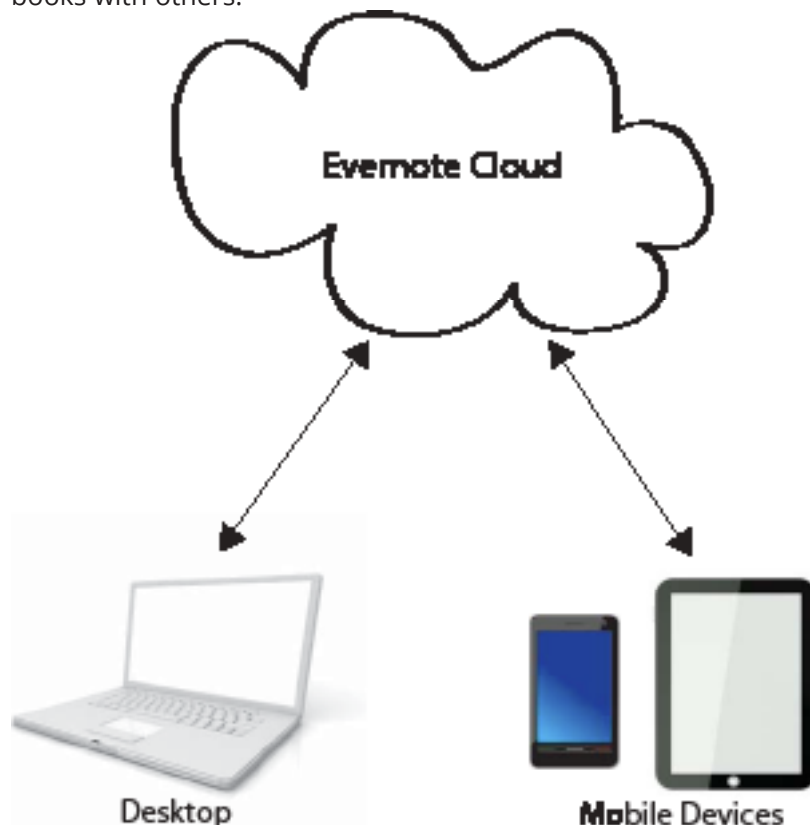
# Gaining Your Effective EDGE

Evernote Best Practices from Effective Edge

Where to store information for later reference is a common challenge for many professionals. If you store something on your hard drive then it is only available when you are in front of that computer. If you store it on the company shared drive or collaboration tool, then you can only get to it when you are behind the company firewall. Dropbox and other file sharing applications work well for documents, but aren't as helpful for saving that article you are reading on a website.

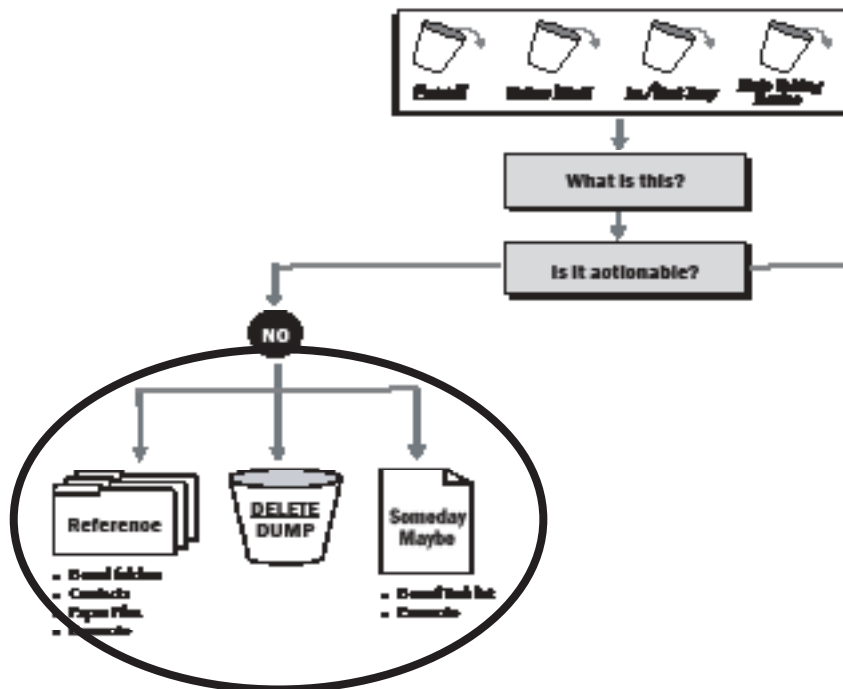
Evernote (<http://www.evernote.com/>) is a database application that can help solve that storage quandary by giving you a place to create notes that include text, images, files and multimedia, and access them when you are offline or from any computer or mobile device with internet access. You can create notes manually or clip information from web pages into a note. You can also create audio and video notes using your microphone, webcam or mobile device.

The desktop version of Evernote stores a copy of your notes on your computer and synchronizes the notes with a repository on the internet (cloud) when you are online. You can access the local copy of your notes on your computer at any time and you can login to the Evernote website or access your notes from your mobile device when you are away from your computer. You can organize the notes into notebooks and tag the notes with keywords so that you can find what you need quickly. You can also share individual notes or entire notebooks with others.



What should you store in Evernote? Anything that you might need access to when you are away from your computer: articles clipped from websites or scanned from magazines, travel documents, photos or scanned copies of receipts, notes from meetings or conferences or notes that you need to share with vendors and customers who are outside your company firewall. You can also store personal information in Evernote. Save your favorite workouts, recipes, home decorating ideas and even grocery or shopping lists as notes.

If you think about your EDGE for Professionals course, Evernote becomes one of your reference tools when you make the decision to keep something and file it away. You can also use Evernote to capture ideas for your Someday/Maybe list.



There are a few occasions when Evernote might not be the right tool for storing reference information. Since Evernote is available from anywhere, be careful about storing proprietary or confidential corporate information in Evernote. It is possible to encrypt text within a note, but the encryption is limited to text and can't be secured for an entire note or notebook.



## Evernote Users Website

For general information on how to use Evernote, refer to their website:

<http://www.evernote.com/evernote/>

Also, while your notes can contain quite a bit of information, including file attachments, notes are limited to a maximum size of 25 megabytes for free accounts and 50 megabytes for premium accounts. If you have large files that you need to access remotely, a file sharing tool like Dropbox, may be a better solution.

Follow the steps in this Whitepaper to setup and configure Evernote as one of your EDGE reference points.

### **Installing Evernote**

You will want to install the desktop version of Evernote on each computer on which you will want to work with notes even when you don't have internet access. Installing the desktop software creates a local copy of that database that is synchronized with your Evernote account on the web. For example, if you want to be able to access your notes from your work computer or home computer even when you aren't online, you will want to install the desktop application on both.

### **To install the desktop software:**

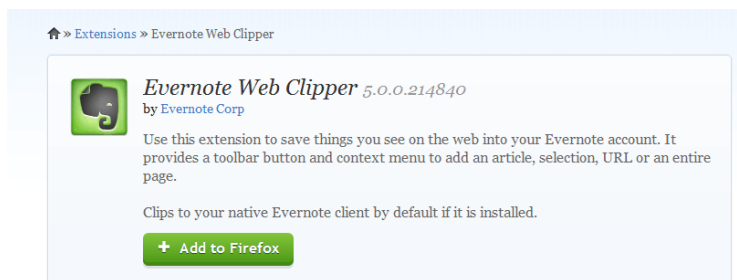
On the PC	On the Mac
<ol style="list-style-type: none"><li>1. Open your web browser and go to <a href="http://www.evernote.com">http://www.evernote.com</a>.</li><li>2. Click on the Get Evernote, It's Free button.</li><li>3. Follow the prompts for your browser to download the software.</li><li>4. When the file download finishes, double-click the file to launch the setup and follow the prompts to install the software.</li><li>5. Click the Evernote icon in your Start menu to start Evernote.</li><li>6. When the program loads, you will be prompted to enter a username and password. If you have not created one previously, click the Get a free Evernote account now link.</li></ol>	<ol style="list-style-type: none"><li>1. Open your web browser and go to <a href="http://www.evernote.com">http://www.evernote.com</a>.</li><li>2. Click on the Get Evernote, It's Free button.</li><li>3. Follow the prompts for your browser to download the software.</li><li>4. When the .dmg file download finishes, double-click the file to launch the setup and follow the prompts to install the software.</li><li>5. Drag the Evernote application bundle into your Applications folder as directed.</li><li>6. From the applications folder, double-click to start Evernote.</li></ol>

On the PC	On the Mac
<p>7. Enter your Full name, e-mail address, username and password in the Register for Evernote dialog box.</p> <p>8. Click Register.</p>	<p>7. When the program loads, you will be prompted to enter a username and password. If you have not created one previously, click the Get a free Evernote account now link.</p> <p>8. Enter your Full name, e-mail address, username and password in the Register for Evernote dialog box.</p> <p>9. Click Register.</p>

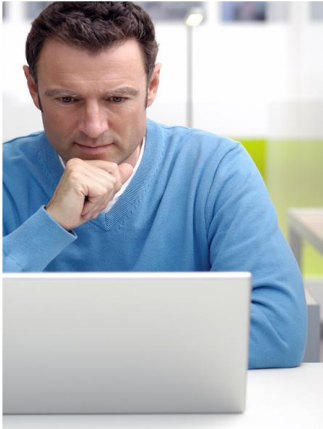
You will also want to install the web clipper for your web browser to make it easy to clip items of interest from the Internet. Following are the steps for installing the web clipper for the Firefox, Google Chrome and Safari web browsers. The web clipper for Internet Explorer is automatically installed when you install the desktop application.

To Install the Web Clipper for Firefox:

1. From Firefox, go to <https://addons.mozilla.org/en-US/firefox/addon/evernote-web-clipper/>.



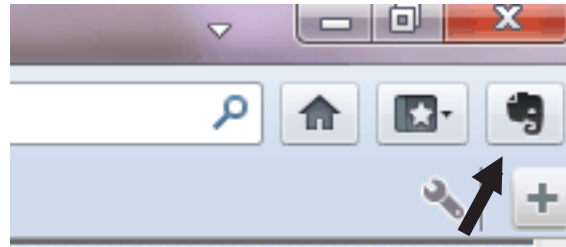
2. Click the Add to Firefox button.
3. Click the Install Now button.
4. Click the Restart button to restart Firefox.
5. The Evernote button will appear in the top right corner of the browser with the other add-on shortcut buttons.



## Stay in the Know

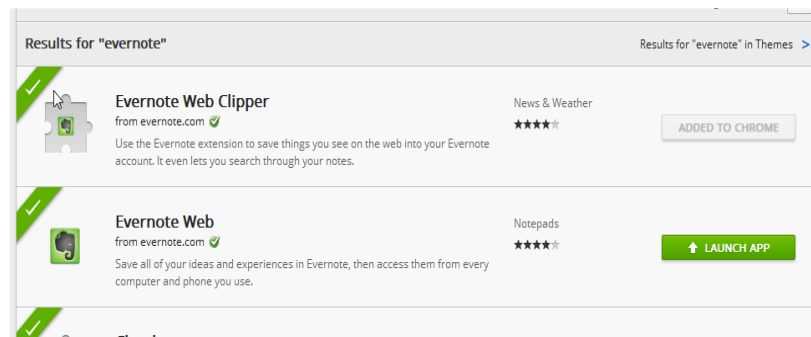
EDGE for Professionals alumni get ongoing, practical, useful and inspiring reminders to continue enhancing their productivity by reading our monthly eNewsletter.

Alumni can sign up to receive our newsletter by visiting [www.effectiveedge.com/blog](http://www.effectiveedge.com/blog) and entering their e-mail address under the "Subscribe to Our Newsletter" heading.



To Install the Web Clipper for Google Chrome:

1. From your Google Chrome web browser, go to <https://chrome.google.com/webstore/search/evernote>.



2. Click on the Add to Chrome button for the Evernote Web Clipper extension.
3. Click Install.

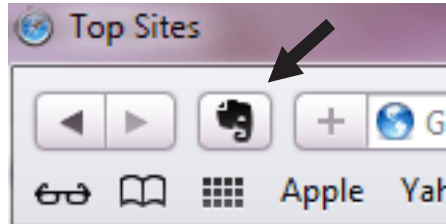


To Install the Web Clipper for Safari:

If you're using Safari 5.0 or earlier, the Safari Web Clipper installs automatically when Evernote for OS X is installed (unless you installed Evernote from the Mac App Store, in which case you'll need to install it by clicking the option in the Clipping section of the Evernote preferences).

If you are using Safari 5.1 or newer on Mac OS X Lion (10.7) or PC, you can install the web clipper using the following steps.

1. From Safari, go to the url: <http://www.evernote.com/about/download/get.php?file=SafariExtension>
2. When prompted, click the Install button.
3. The Evernote button appears to the left of the URL address box.



### ***Creating Notes in Evernote***

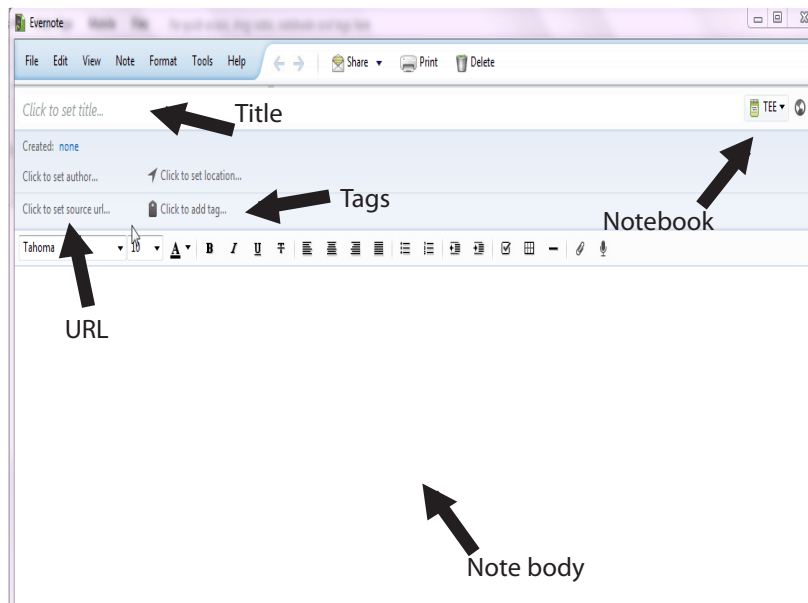
There are a variety of ways to create notes in Evernote. Following are some of the most common methods from your computer or mobile device.

#### **To create notes in Evernote:**

On the PC	On the Mac
<p>Creating new notes in Evernote:</p> <ol style="list-style-type: none"> <li>1. Click the New Note button to create a new text note or click the down triangle next to the New Note button to select a new Ink, Audio or Webcam note.</li> <li>2. In the note header, enter a title, select a notebook and enter any desired tags for the note.</li> <li>3. Add the information for the note (type or ink text or record and audio or webcam note) in the body of the note.</li> </ol>	<p>Creating new text notes in Evernote:</p> <ol style="list-style-type: none"> <li>1. Click the New Note button.</li> <li>2. In the note header, enter a title, select a notebook and enter any desired tags for the note.</li> <li>3. Add the information for the note in the body of the note.</li> </ol> <p>Creating new iSight notes in Evernote:</p> <ol style="list-style-type: none"> <li>1. Click the iSight Note button on the toolbar.</li> <li>2. Select the notebook in which you want to store the note and click OK.</li> <li>3. Click the Take a Video Snapshot button.</li> <li>4. After the picture is taken, click the Add to Evernote button.</li> </ol>

On the PC	On the Mac
<p>Pasting a Note:</p> <ol style="list-style-type: none"> <li>1. Select text in a program on your Desktop and press CTRL+C to copy it.</li> <li>2. Press CTRL+ALT+V to paste a new note in Evernote. Evernote will create a note containing the copied content and use the first line as the title of the note. The note will be assigned to your default notebook and will not have any tags.</li> </ol> <p>Clipping selected data:</p> <ol style="list-style-type: none"> <li>1. Highlight data in an application on your desktop.</li> <li>2. Press ⌘+a to clip the data to a new note in Evernote. Again, the title of the note will be the first line of the data and the note will be stored to the default notebook without tags.</li> </ol> <p>Dragging data into a note:</p> <ol style="list-style-type: none"> <li>1. With a note visible, drag an image or PDF file into the body of the note. Premium users can drag any type of file into the note.</li> </ol> <p>Taking a Screenshot with Evernote Helper:</p> <ol style="list-style-type: none"> <li>1. Click on the system tray icon (to the left of the Windows clock) and right-click on the Evernote icon.</li> <li>2. Choose Clip Screenshot. Alternatively, you can press ⌘+PRINTSCREEN on your keyboard.</li> <li>3. Select the portion of your desktop that you want to capture.</li> <li>4. Evernote clips the picture to a note, titles the note Screen</li> </ol>	<p>Creating new audio notes:</p> <ol style="list-style-type: none"> <li>1. Click the Audio Note button on the toolbar.</li> <li>2. Click Record to begin recording.</li> <li>3. When you are finished, click Stop to stop recording. Evernote will attach the audio file to your note.</li> </ol> <p>Paste from anywhere:</p> <ol style="list-style-type: none"> <li>1. Select the information you want to paste in Evernote and press ^+C to copy the information to the Clipboard.</li> <li>2. Press ⌘+^+V or click on the Evernote icon in the menu bar and choose Paste to Evernote option.</li> <li>3. Evernote will create a new note containing the copied information and assign the first line of the information as the note title. The note will be saved to the default notebook without any tags.</li> </ol> <p>Drag and drop</p> <ol style="list-style-type: none"> <li>1. Drag the image or PDF file on top of the Evernote icon in the Dock. Premium users can drag any type of file on to the Dock. The file will be attached to a new note in the default notebook.</li> </ol> <p>Taking a screenshot:</p> <ol style="list-style-type: none"> <li>1. Click the elephant icon on your menu bar.</li> <li>2. To capture part of the screen, choose Clip Rectangle or Window to Evernote and drag the crosshair over the region of the screen you want to capture.</li> </ol>





### ***Clipping content to Evernote***

To clip from Internet Explorer:

1. Highlight the content you want to clip to Evernote.
2. Right-click on the selection and choose Add to Evernote from the menu.
3. Enter the title, tag(s) and select the notebook in which you want to store the note in the New Clip dialog box.
4. Click Add Note.

To clip from Firefox:

1. Navigate to the page you want to clip. Highlight the text if you only want to clip part of the page.
2. Click the Evernote button in your toolbar. If you have previously selected part of the page, a note will be created based on that selection. If nothing was highlighted, then you will see the choices Clip Article, Clip Full Page and Clip URL.
3. Select Clip Article to clip the highlighted section, Clip Full Page to clip the entire web page or Clip URL to save only the web address of the page.
4. A new note containing the designated information will appear on the screen.
5. If desired, change the note title, tags or notebook.

To clip from Google Chrome:

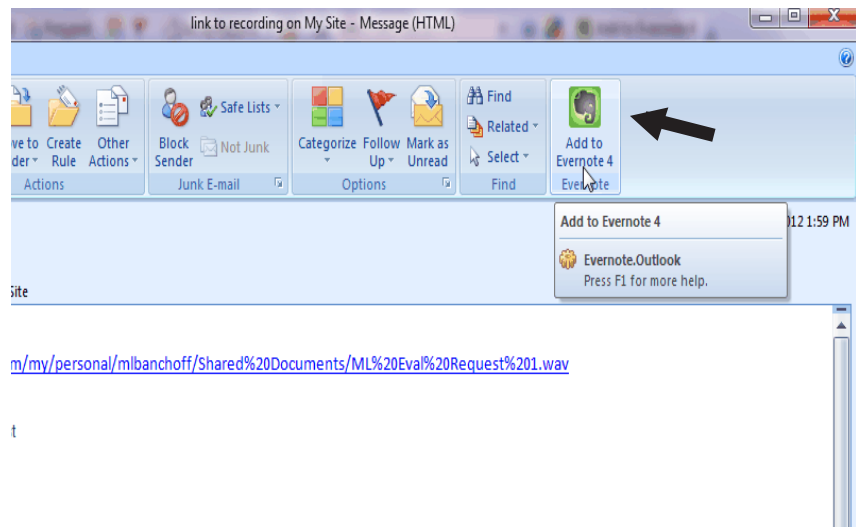
1. Navigate the page you want to clip. If you only want to clip part of the page, highlight the desired content.
2. Click the Evernote clipper button.
3. In the clipper window, enter a title, select a notebook, add tags and a comment if desired.
4. Click the down arrow on the Clip button to choose Clip Selection, Clip article (Evernote picks what it thinks is the relevant article on the page), Clip Page or Clip URL.

To clip from Safari:

1. Navigate the page you want to clip. If you only want to clip part of the page, highlight the desired content.
2. Click the Evernote clipper button.
3. In the clipper window, enter a title, select a notebook, add tags and a comment if desired.

To clip from Microsoft Outlook:

1. Highlight or open the item you want to clip to Evernote.
2. Click the Add to Evernote button on the ribbon.



3. Enter a title, tags and select the desired notebook.
4. Click the Add Note button.

## E-mailing content to Evernote

When you create an account, Evernote assigns you an e-mail address to which you can send information you would like saved as notes. Each Evernote account comes with a unique e-mail address which can be used to add content via e-mail.

### To locate your Evernote e-mail address:

On the PC	On the Mac
<ol style="list-style-type: none"><li>1. Click on the Tools menu and choose Account Info.</li><li>2. Locate your e-mail address next to the E-mail notes to option.</li></ol>	<ol style="list-style-type: none"><li>1. Click on Evernote application menu and choose Preferences.</li><li>2. Click on the Account Info tab to locate your e-mail address.</li></ol>

We recommend that you save your Evernote address to your contact list so that you can easily e-mail your Evernote account.

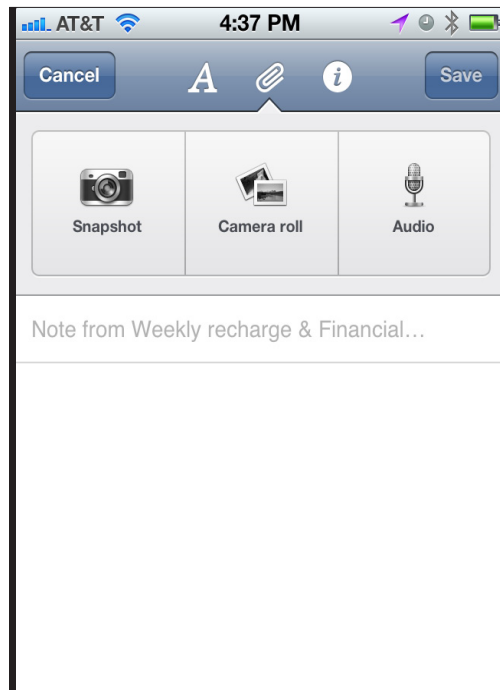
To send an e-mail to a notebook:

1. Select the forward option in your e-mail tool.
  2. Enter your Evernote e-mail address in the To: line.
  3. Change the subject to use the following format:  
Title @Notebook #tag1 #tag2
- Title is the subject for the note.
  - The notebook name must be preceded by the @ symbol and appear before any tag names. If the notebook name does not already exist in Evernote, then the note will be assigned to the default notebook.
  - Proceed each tag name with a # sign and separate tag names with a space. If the tag name does not already exist in Evernote, then the tag will be dropped from the note.

To create notes from your mobile device: text, voice, photo:

1. Download the Evernote mobile application for your device.
2. Tap the New Note (+) button. The default note is a text note.
3. To attach a file, tap the paper clip tool.
4. To create an audio note, tap the microphone (Audio) icon.
5. To attach a photo to the note, tap the camera (take a snapshot) or picture (attach from camera roll) icons.

(See screen capture on the next page.)



To attaching files to notes:

1. Create a new note.
2. Drag the file into the note or choose File, Attach Files from the menu.
3. Select the file(s) and click the Open button.

Free users can attach image and PDF files up to 25 MB in size. Premium users can attach any file type up to 50 MB.

Copying a note

You can create templates of commonly used note formats like meeting notes, travel itineraries or shopping lists. When you want to create a new note using that format, you can copy the template note to a new note, leaving the original intact.

### To copy a note:

On the PC	On the Mac
<ol style="list-style-type: none"><li>1. Locate the note you want to use as a template.</li><li>2. Right-click on the note and choose Copy Note.</li><li>3. Select the default notebook or choose the Notebooks option to select the notebook of your choice.</li><li>4. A new copy of that note appears in the designated notebook. Modify the title, tags and other settings as desired for the new note.</li></ol>	<ol style="list-style-type: none"><li>1. Locate the note you want to use as a template.</li><li>2. Hold down the CTRL key and click on the note.</li><li>3. Choose Copy to Notebook.</li><li>4. Select the notebook of your choice.</li><li>5. A new copy of that note appears in the designated notebook. Modify the title, tags and other settings as desired for the new note.</li></ol>

### Organizing notes

Over time, you may create a large number of notes in your Evernote system. You can organize those notes by using tags, notebooks and stacks.

Tags are keywords that may not appear in the title or body of the note, but that you would like to use to search for or group the note. You can assign a tag to any note regardless of which notebook it is stored in. For example, if you scan receipts into Evernote, you can assign an “expenses” tag to those notes. When you want to find those expenses, you can view the “expenses” tag and it will pull all notes with tag regardless of their location. If you take notes at a conference, you might add a “conference notes” tag so that you can easily view any notes from any conference together.



account info (9)  
arms (7)  
Asian (24)  
Austin (21)  
balance ball (3)  
beef (12)  
beer (9)  
berbere (1)  
bezar (3)  
blogging (14)  
books (4)  
breakfast (7)  
bycatch (2)  
ca2012 (9)

You can also group notes by storing them in a notebook. How you group your notes is up to you, but consider creating notebooks around topic areas that you would want to easily access from your mobile device. For example, you might want to be able to pull up your travel itinerary while you are on the road. Storing those itineraries in a separate notebook will make it easier to get to the one you need.

One reason to create a notebook would be able to share it with others. For example, if you have project materials that need to be accessed by people inside and outside the company, you could create a project notebook that you share with all project members.

Finally, if you have several notebooks, you can organize them in Stacks. You don't store notes in a stack, but instead use them to group similar notebooks together. Using Stacks makes it easy to collapse the notebooks that you are not working with so that you can focus on the ones you need.

We recommend that you create a few notebooks based on topics and then group those notebooks into two stacks: personal and work. Following is an example of what your notebook structure might look like.

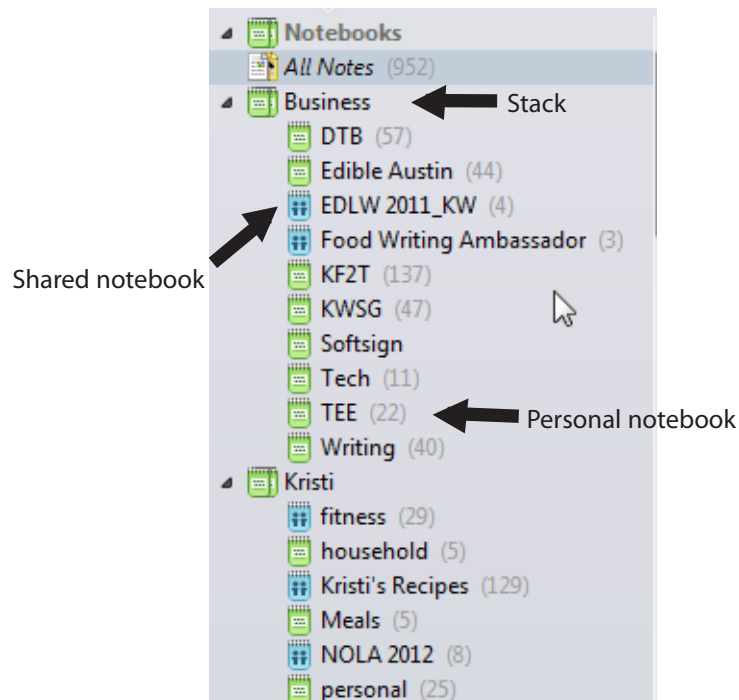
Recommended notebook structure:

#### Personal Stack

- Fitness
- Recipes
- Shopping

#### Work Stack

- Articles of interest
- Expenses
- Project materials (shared notebook)
- Someday/Maybe
- Travel itineraries



### Using tags effectively

You can add one or more tags to any note. To create a tag, type the name in the Tag field of the note editor and press Enter. You can also assign a tag by dragging the tag from the Tag list onto the note.

You can view the assigned tags in the Tags section of the navigation pane. The number of notes assigned to that tag will appear in parentheses after the tag name. Click on the tag to view all of assigned notes.

To rename a tag:

1. Right-click (or CTRL+click for the Mac) on the tag name in the Tag list of the navigation bar.
2. Choose Rename from the menu.
3. Type a new name and press Enter. The tag name will be changed in all of the notes assigned to that tag.

To delete a tag:

1. Right-click (or CTRL+click for the Mac) on the tag name in the Tag list of the navigation bar.
2. Choose Delete from the menu.
3. Click Delete. The tag will be removed from any assigned notes. The notes will not be deleted.

To create a notebook:

1. Choose File, New Notebook from the menu.
2. Enter a name for the notebook.
3. Designate the type of notebook you want. A local notebook is only available on that computer. A synchronized notebook can be accessed from your mobile device or any computer connected to the internet.
4. Check mark the Make this my default notebook option if you would like the new notebook to be selected by default when you create or clip new notes.
5. Click OK.
6. To add notes to the notebook, drag existing notes to the notebook name or change the notebook assignment in the note editor.

To create a stack:

1. Right-click (CTRL+click on the Mac) on a notebook in the navigation pane.
2. Choose Add to Stack from the menu.
3. Select an existing stack or choose New Stack to create a new grouping. By default the new stack will be named Notebook Stack.
4. To rename the stack, right-click on the stack and choose Rename from the menu.
5. Type the new name and press Enter.
6. To add a notebook to a Stack, drag the notebook onto the appropriate stack name.

### ***Searching***

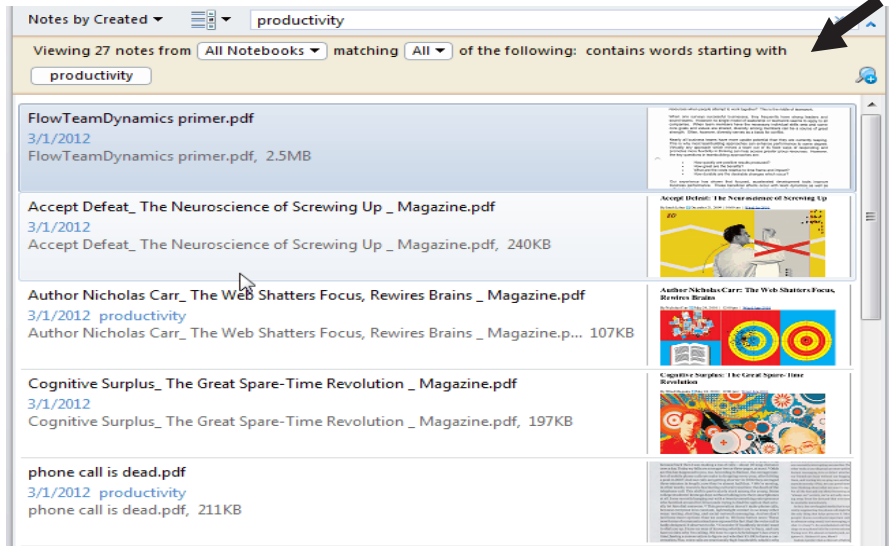
Evernote has a powerful search engine that can find keywords or phrases in the tags, title, or body of the note and even the text of an attached PDF.

**To start your search:**

1. Select the notebook in which you want to search or click All Notes to search through everything in your Evernote database.
2. Enter the search term in the search textbox and press Enter. All notes matching that criteria will appear in the Notes window.

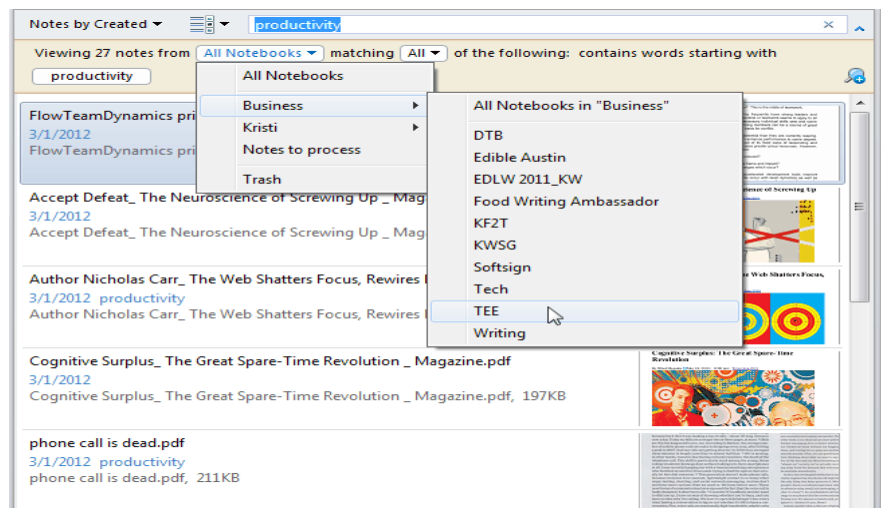


Search explanation bar



You can narrow your search results by using the Search Explanation bar. To make the Search Explanation bar visible, choose View, Show Search Explanation from the menu.

The Search Explanation bar shows you the notebook, terms and tags being used in the search. As you modify the search, any new criteria will show in the bar.



If you perform a search often, you can save it so that you do not have to rebuild the query each time you need it. Saved searches appear in the Saved Searches section of the navigation pane.

**To save a search:**

1. Perform the search you would like to save.
2. Chose File, New Saved Search from the menu.
3. Enter a name for the Search and click OK.

***Sharing Information from Evernote***

One of the powerful features of Evernote is the ability to easily share individual notes or entire notebooks with others.

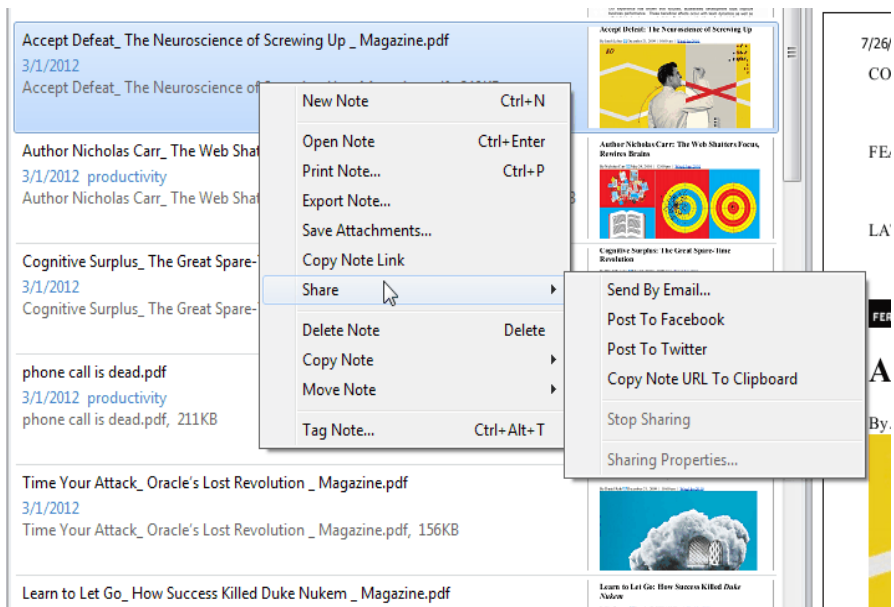
Sharing notes

You can share individual notes over Twitter and Facebook, by e-mailing the note contents or sending a public URL to the note. The recipient of the note does not have to have Evernote to view the contents of the note.


One word of caution, if you share a URL to a note, that note becomes public and anyone with the URL can view it. Do not share a URL for a note that contains private or confidential information.

**To share a note:**

1. Select the note you want to share.
2. Click the Share button on toolbar.
3. Choose the method by which you want to share:
  - Post to Twitter: Creates a tweet containing the title of the note and a URL to the note. Edit the text, if desired, then click the Tweet button.
  - Post to Facebook: Creates a post contacting the note title and URL. Enter a personal note about the post and click the Share Link button.
  - E-mail a note: Enter the e-mail address for the note recipients, edit the subject if desired and enter an explanation I the note text box. Click the Send button.
  - Copy Note URL to Clipboard: Copies the note URL to the clipboard. You can paste the URL into any tool to share it.



### To stop sharing a note:

On a PC	On a Mac
<ol style="list-style-type: none"> <li>1. Select the note.</li> <li>2. Choose Note, Share from the menu.</li> <li>3. Choose Stop Sharing.</li> <li>4. Click the Stop Sharing button.</li> </ol>	<ol style="list-style-type: none"> <li>5. View the note info. If the note info is not visible, choose View, Show Note Info from the menu.</li> <li>6. Click the Shared icon  in the Note Info bar.</li> <li>7. Click the Stop Sharing button.</li> </ol>



### Sharing Notebooks

You can share entire notebooks publicly or with individuals. Individuals with whom you share notebooks can also edit the notebook if you both have premium accounts.

On a PC	On a Mac
<ol style="list-style-type: none"> <li>1. Right-click on the notebook you want to share.</li> <li>2. Choose Share Notebook from the menu.</li> <li>3. To make the notebook public, choose the "Start sharing with the world" option. Choose a URL, enter a description, select a sort order and choose Submit.</li> <li>4. To share the notebook with selected people, choose the "Invite individuals to access this notebook" option. Enter the e-mail addresses of the individuals, select whether they can view or modify the notebook, determine the notebook's security, add a message to the invitation and click the Invite button.</li> </ol>	<ol style="list-style-type: none"> <li>1. Click the Shared tab at the top of the Navigation pane.</li> <li>2. Locate the notebook you want to share in the My notebooks list and click Start sharing.</li> <li>3. To make the notebook public, choose the "Start sharing with the world" option. Choose a URL, enter a description, select a sort order and choose Submit.</li> <li>4. To share the notebook with selected people, choose the "Invite individuals to access this notebook" option. Enter the e-mail addresses of the individuals, select whether they can view or modify the notebook, determine the notebook's security, add a message to the invitation and click the Invite button.</li> </ol>

Evernote can serve as a powerful solution for your reference needs. Use it to centralize your storage, cut the clutter and give you confidence that you can easily get to the things that you need, when you need them. You can spend less time looking for things and more time taking care of your priorities.

## Keyboard Shortcuts

On a PC		On a Mac	
Ctrl + Alt + N	Switch to Evernote and create a new note	⌘+CTRL+N	Switch to Evernote and create a new note
 + PrintScreen	Start screen capture mode	⌘+CTRL+C	Start screen capture mode
Esc	Cancel screen capture	Esc	Cancel screen capture
 + A	Clip selected	⌘+CTRL+V	Paste clipboard into Evernote as a new note
Ctrl + Alt + V	Paste clipboard into Evernote as a new note		
Ctrl + N	Create a new note when Evernote is the active window	⌘+N	Create a New Note