

Evernote 101: Let's Start at the very beginning...

954 Views

By Megan Iemma | Latest Update Jul 10, 2013 2:57 PM

Within the Women in Focus community, I have noticed some requests for help with Evernote, so this series will be over four posts on using Evernote as an individual and for your business or workplace. If you are looking for resources on how to use Evernote, go to my Pinterest board: <http://pinterest.com/meganaiemma/evernote-for-business-and-education/> for further shortcuts and ideas.



Get organised, the first time via your Notebooks

Something that I have had to learn the hard way over the past few years: Be Organised! This is not one of my strengths however it's having a good system in place does help (and trying to stick to it)!

There are three versions of Evernote you can use:

1. Mobile (Android and iOS)
2. Desktop (for Mac and PC) Mac App Store - Evernote
3. Online (<http://www.evernote.com>) and sign in in the top right hand corner.

Step 1: Set up an account with Evernote. (<http://www.evernote.com>) and then get started in setting up your notebooks. Take 5-10 minutes and brainstorm as many titles for notebooks (and then create these notebooks). There is a hierarchy within Evernote and it goes like this: Notebook Stack (group of notebooks), Notebook and then a NOTE.



Step 2: Some people will prefer to set things up on the desktop version (don't worry, it syncs (updates) with the online and mobile app version (as long as you are connected to the Internet) and if not, it will update when there is an Internet connection.



Notes, as well as notebooks can be shared (and the little people icon) in the top right hand corner means that the notebook is shared with someone else. This is the icon on the "Desktop version" when you open your notebook. It will give you a web link so that you can share a folder or a note.

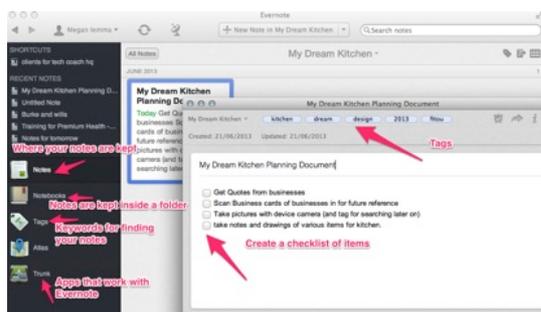


Desktop, Online or Mobile

Here is the **Mac** Version of the desktop app. In the sidebar, you will find

1. Shortcuts (Drag important notebooks or notes to that section for quick reference)
2. Recent Notes
3. Notes
4. Notebooks

- 5. Tags (all your keywords you have used)
- 6. Atlas
- 7. Evernote Trunk (Apps that work with Evernote)



What to do with all my notes?

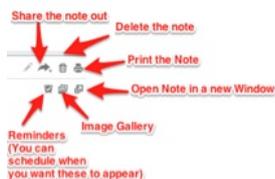
Now, it's time to start adding your notes (much easier now you have your categories). Don't worry, if you already have an Evernote account, get the notebooks sorted out and move the notes to the appropriate notebook. In the above picture you can see my notes on creating a "dream kitchen". This is demonstrating some of the features you can add to your notes.

Tag away!

Starting from the top, you can 'tag' your notes. This is just another name for keywords, which helps to find your notes at a later stage. Put as many or as little depending on the content of the note. It might be good to also brainstorm a list of commonly used "tag words", remember you could also use people's names.



This is what a '+ new note' template looks like. This is from the 'Online' version of Evernote. As seen by the screen shot, you can add a checkbox list (click to create box, and then click on the box once created to 'tick' the box). You can also add attachments to the 'note' such as charts, images, PDF's and other types of files (however you can only search within these documents with "Evernote Premium and Evernote Business").



You can also see 'add location' this is handy if you are working in different offices or even interstate. These notes will then appear in the "Atlas" see above in Desktop version and makes it easier to remember for meetings or conferences.

When you save your note, these are the options you have available with each note. With sharing the note out, this can be via Facebook, LinkedIn, Twitter, Email or a web link. A reminder can be a great add-on with your note especially if there are to-do items within your note.

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19 Comments

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Anna Couston Jul 11, 2013 9:26 AM

Thanks for sharing this informative and easy to follow step-by-step! I love Evernote and can't wait to read part 2 so that I can get the most out of it as possible. Thanks again Megan lemma for sharing your expertise!

Like (1)



Lauren Palmer Jul 11, 2013 9:33 AM

Hi Megan, I've been meaning to set myself up on Evernote for ages - this has given me the motivation I need to get onto it!! Thank you :)

Like (1)



Katie Mihell Jul 11, 2013 10:06 AM

Thanks Megan - you may yet have inspired me to shift from my piles of unorganised hard cover notebooks to the digital format ...does it sync from Notes app in the iPhone?

Like (1)



Ana Smith Jul 11, 2013 11:11 AM

Megan, thanks for sharing. I downloaded it over a year ago and never really used it because didn't know the best ways to make use of it, thank you thank you :)

Like (1)



Megan lemma Jul 11, 2013 2:51 PM (in response to Ana Smith)

Ana,
I would love to know how you would like to personally use it? Then I can incorporate that into future articles. It's the stories that matter when teaching a new skill.
Megan

Like (0)



Megan lemma Jul 11, 2013 2:57 PM (in response to Anna Couston)

What would you love to see in Part 2? I have several ideas up my sleeve, but would love some input.
Megan

Like (0)



Megan lemma Jul 11, 2013 2:58 PM (in response to Lauren Palmer)

Make sure you download the desktop version if possible, (it does make some things easier :)
Megan

Like (0)



Megan lemma Jul 11, 2013 2:59 PM (in response to Katie Mihell)

Dear Katie,
If you have 10 minutes, could do a skype session and share how you can get your notes fixed up ;) There are ways and means of getting things over from the Notes app
Megan

Like (0)



Bonny Bayne Jul 12, 2013 2:29 PM

I love this App, took me a while to get up to speed (but then I'm definitely technology challenged at times). Now I use it all the time for client meetings meaning it can then just be synced and uploaded to work files when I walk back in the door.

I look forward to reading all of series you do.

Like (1)



Bonny Bayne Jul 12, 2013 2:31 PM

Megan, for one of your posts I would love information on how to use the 'reminders'?

Like (0)



Anita Kelsall Jul 12, 2013 3:29 PM

Thanks for the Evernote tips Megan! very useful! it's a really great tool.

Like (1)



Megan lemma Jul 12, 2013 4:01 PM (in response to Bonny Bayne)

Dear Bonny,
Ok, it shall go into the next blog post which shall be up for "Tech Tuesday". Aiming to get up a post a week by the Tuesday. Anything else Bonny Bayne

Like (0)



Megan lemma Jul 12, 2013 4:02 PM (in response to Anita Kelsall)

Thanks Anita Neil. The next article will be full of tips and tricks that people can use to really improve their productivity with Evernote.

Like (0)



Bonny Bayne Jul 12, 2013 4:12 PM (in response to Megan lemma)

My phone and work Evernote does not seem to sync automatically so if it can be, just how to do that. Thank you so much :)

Like (0)



Megan lemma Jul 12, 2013 4:13 PM (in response to Bonnie Bayne)

Mmm, Bonnie Bayne will have a look into it for you. (work Evernote being Desktop or online versions). And what type of lag are you talking about? Megan

Like (0)



Megan lemma Jul 15, 2013 11:37 AM

Part 2 is coming out tomorrow, so stay tuned.
Megan

Like (0)



Megan lemma Jul 16, 2013 9:36 PM (in response to Katie Mihell)

Dear Katie Mihell
Have you looked at IFTTT / Recipes search for 'Evernote' there
This might help.
Megan

Like (0)



Anna Couston Jul 17, 2013 11:28 AM (in response to Megan lemma)

Hi Megan - love part 2 as well. So practical and easy to follow. For me, I would like some advice on how to best use Evernote to annotate PDFs or how to best use evernote in conjunction with PDF docs? Not sure if that is even do-able on Evernote?
Thanks! :)

Like (0)



Megan lemma Jul 17, 2013 5:34 PM (in response to Anna Couston)

Dear Anna,
I do have a solution for you, that would help with Evernote...tune in for Part 3 to find out ;)
Megan

Like (1)

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