COMPUTER
CORNER

Dropbox, Evernote, and OneDrive

Genealogy research in today's world, we often reflect, is so much more productive than, say, for Uncle Hobert back in the 1950s. We have computers, we have genealogy software, we have Ancestry.com, we have on-line databases and libraries with more and more access to all of the above. Yet sometimes with all of this available, so much at our fingertips, it is almost nostalgic to think: wasn't Life simpler 'back then'? Sometimes we think we may be tempted if we were able to return to yesteryear and the ol' 3" x 5" index cards in a little wooden box with a hinged top; a roll of 3-cent stamps to create a SASE and send off to some elusive contacts, hoping that perhaps this addressee will respond and give us a few tidbits about our own ancestors; and a file of letters in cursive we can actually read through at leisure.

*There must be others who have felt the same way, because some of the most popular apps (applications) for computer users in general, and genealogists in particular, capture that old-time genealogy feel, where one feels in control of all that 'paperwork', yet do it in a way that allows us to use today's technology. Within AGS, we have been introduced to two of the most powerful of these apps: **Dropbox and Evernote**. We learned about Dropbox in the article "Genealogy in the Cloud" in this column, Nov 2012 (Quarterly, Vol 37, Issue 3). AGS learned about Evernote from the excellent presentation by Kerry Scott of cluewagon.com during our March 2015 AGS meeting; additionally during Dick Eastman's talk in April we learned how to get started going paperless with genealogy records.*

This column will discuss these two apps, as a review and for a little compare and contrast exercise. The first question we must ask the reader: Do you as a genealogist have both an Evernote account, and a Dropbox (or OneDrive) account? I suggest you sign up for both. They are both free, and the time spent in getting an account for each is one to three minutes – just go to Dropbox.com (we'll discuss OneDrive later) and Evernote.com respectively, and follow the instructions to create an account as a new user. More importantly, it is difficult to understand if a software application will be useful to you as a genealogist or elsewhere within your life unless you get in there and actually install it and launch it. Meanwhile, let's begin examining these two apps.

Dropbox: Dropbox is certainly the most straightforward, and easy to understand of the two. Any genealogist that owns and uses more than one computer-related device (e.g., desktop, laptop, smartphone[i], or electronic tablet such as a Samsung Galaxy or an iPad) can make good use of a Dropbox account. The reason for this is that Dropbox is a virtual flash drive that is always 'plugged in' yet will sync between your devices. By that I mean if you establish a Dropbox account and then download and install the Dropbox software on each of your devices, then Dropbox will appear as

another folder on your hard drive and everything works 'automagically' thereafter: namely, if you save a document into the Dropbox folder on one device, then when you open up another of your devices, let's say your laptop, then (after a short time interval to complete the sync) your document is now in the Dropbox folder on your laptop as well. Similarly you will find it in your Dropbox folder on any of your other devices – plus on-line. You can also use the 'public' feature of Dropbox to share your file with any of your colleagues or family members. Very nice!

Evernote: In contrast, Evernote does not appear on your hard drive like just another folder, as does Dropbox. Dropbox's files are actually on Dropbox's servers, and your Evernote files are on Evernote's servers. [It's all about the Cloud, isn't it?] During installation, you have the option to create an Evernote icon on your desktop or toolbar. Then to use your Evernote account, you click on that Evernote icon. This will open the Evernote application for you, allowing you to view (and access) all the folders, images, calendars, and notes that you have collected within Evernote.

Evernote encourages you to build your world around Evernote. This may be difficult for many of us to accept, but power users like Kerry Scott, Michael Hyatt, and Dick Eastman tell us it is an allegiance that pays big dividends, especially with what tends to be a messy organizational challenge like genealogy. The reason for this is a combination of things that Evernote does very well. The overarching feature is its ability to search within the Evernote folders – not just search text documents, but PDF files, photo images, emails, everything you have linked or loaded into your Evernote area. Evernote (and Kerry) even claim that if you take your notes, say from an AGS presentation, and photograph them (from your smartphone) or scan them and email them into your Evernote folder, then a) you have them captured in your little portion of Evernote's Cloud (server) (unlike what usually happens to your notes after a lecture), and even better b) Evernote will include them in the searches when you are looking for something.

There are two big ideas embedded in that last thought: the first is that you can **email** research material (scans, images, documents) directly into your Evernote folders. This is accomplished by a special email address that Evernote assigns to you when you create an account. It's a weird-looking address, such as *username.786b840@m.evernote.com* . However, just add it into your email or tablet contact list as someone named "Evernote" and you don't have to worry about remembering it after that. Thus to send an email into Evernote, just forward it to that weird email you have been assigned. By default, the email message will go into your default notebook, and the subject of the email will become the title of the new note. Even better, you can 'force' your message to go into a specific folder by using the at sign [@] at the end of the subject line: @Foldername in the subject line of your message sends it into your folder named Foldername, or use the pound or hashtag sign (#) to tag it, say with a surname of interest. Nice!

The other 'big idea' of Evernote is the **search capability**. This is turned on all the time: whenever you store something into Evernote, it does its search as you load, so it suggests a couple of your stored items that have perhaps similar keywords. More on this later.

Learning Curve: So how difficult is it to learn Evernote? It is certainly not immediately obvious like Dropbox. From Michael Hyatt, a major blogger and user of Evernote, we have this observation:

When it comes to [Evernote](#), I am a hopeless fanboy. It has become an indispensable part of my productivity tool box. I use it as much as I use email or my calendar. While it is easy enough to get started with Evernote, it is a program that is incredibly deep and rich. Just when I think I have mastered it, I discover a new tip or trick. In addition, the company regularly issues new updates with additional features. **It took me two years before I felt comfortable with Evernote**. *[emphasis mine]*

OneDrive: "PC" implies a Microsoft-based personal computer, and includes laptops, desktops, and even a tablet, e.g., Surface. If you purchased a new PC recently, say in 2014, or if you buy one this year or next, it will come with Microsoft **8.1** or Microsoft **10** (why no MS 9? Possibly because the Japanese consider nine to be unlucky as in Japanese the word for nine sounds similar to the word for "pain" or "distress" – Ha! We already had that with 8!) as the operating system, and you will be 'encouraged' (almost forced) to create a Microsoft login account. Yes, another password, and some 'encouragement' to use a Microsoft app store (rather than iTunes and the Apple app store established on an iPad). There are some benefits to this account, one of the best of which is OneDrive.

OneDrive is Microsoft's version of Dropbox. [That's me saying that, not Microsoft!] Like Dropbox, it appears as a new folder on your hard drive – but storage actually occurs in the Cloud. Earlier versions were called SkyDrive (an allusion to The Cloud, as discussed in that *Genealogy in the Cloud* Quarterly article), until one day in Feb 2014, we awoke to find it had been changed to OneDrive – the result of a lawsuit. No matter, the important qualities are that you get 15GB of space *for free* (vs. Dropbox's 2GB for free), and changes are synchronized whenever users save the document; where conflicts occur, the saving user can choose which version to keep. This allows for collaborative real-time editing with multiple users. I know, you are the only user, but … the nice thing is that OneDrive is synced for each of your computers under your Microsoft account. I have been able to keep my Dropbox under 2GB except for one time I needed to upgrade to allow a colleague to send me a huge (12GB) file by Dropbox. So 15GB under OneDrive seems terrific. But the upgrade is cheap: For $2 a month, you can upgrade your OneDrive account to 100GB. [In comparison, it costs $10 a month to upgrade your Dropbox account similarly.

OneDrive comes installed/built-in on any PC running Windows 8.1 – however for Windows Vista, 7, or 8, you can easily download OneDrive for Windows from Microsoft.com once you establish your Microsoft account (yes, you're going to have to do that). [note: Windows XP does not support OneDrive.] Once you save files to OneDrive, the sync capability allows you to access those files from any of your devices, including PCs, Macs, tablets, and smartphones. OneDrive comes with three major folders already in place: Documents, Pictures, and Public – basically this is a suggestion, as OneDrive is just another storage area, and you can create your own sub-folders, or put any type of file in any of the folders.

Evernote vs Dropbox *(or OneDrive)*: So if Dropbox (and OneDrive) give you all kinds of storage space in the Cloud, and even sync your collection across your various computers, why would you want to get into Evernote? Isn't Evernote also a structure in the Cloud that syncs between your computers? Yes, but Evernote does so much more – once you immerse yourself into it. Kerry Scott reminds us of some of the 'special' features of Evernote:
   * Evernote can be a repository for everything related to your research

* Everything in Evernote is searchable "so you don't have to be organized" – [Ha!]
* Like Dropbox, Evernote syncs across all the devices you own

Let's look at a few of the most powerful features of Evernote to show how it is a much more sophisticated app than a free storage bin, or even just a note-taker.

Web Clipper: You may be familiar with the Print Screen function on your keyboard. In short, pressing the key labeled PrtSc [usually found on newer keyboards on the upper row, toward the right] will take a snapshot or screen shot of everything displayed on your monitor. This can be quite useful when doing research on-line. Windows 8 provides a confirmation after you capture a screen shot and loads it into Picasa, or your default photo editor for editing and saving. All very nice, but just a bit cumbersome and not entirely user friendly.

With Evernote, you use their Web Clipper to select or 'crop' *just that portion of the screen you are interested in*, and then when you save it, it goes into your Evernote folders and is thus completely searchable like any other note you have saved. How do you initiate this Web Clipper? Once you install Evernote, the Evernote icon [an elephant head] appears at the right end of the address bar in your browser. Click on that icon, and it will lead you through the mouse-clicks to capture the portion of the screen you want, and suggest you 'tag' it to add to the identification. Evernote doesn't complete the save until you click to tell it to do so – until that point, you can add tags, or tell it what folder you want, or add additional notes. You need to try out this nice feature on your own.

Search Technique: [in the reference] Natasha Quinonez tells us that we create or upload documents in the Cloud with Evernote, and they all become an Evernote type document once we do so, regardless of how they started out. This allows Evernote to do what it does best: search for you across all 'notes' whether those notes are images, audio files, documents, web clippings, whatever
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Tags vs Folders: Michael Hyatt had an epiphany in a recent column. [The last time I had an epiphany my wife told me to go clean it up.] He was frustrated that you cannot put one Evernote note into multiple folders – of course, you could if you made copies of it, but that rather kills the sync idea. What he realized is the power of tags. Tags in Evernote are like labels in Gmail: you can add as many to a note as you wish. Thus if you have a document that talks about two of your surnames plus Austin, TX you can add those three tags to the document, and not worry about sticking it in three folders. In this way, Hyatt has changed his organization in Evernote to have almost all his notes in one single folder – but each note has the important tags that will facilitate the already powerful search capability. Eureka!

Email: PDF files, documents, and scanned images are a big part of the fruits of genealogy research, but what about email messages? We talked earlier in this column about the special address Evernote will supply with your account to allow the transition of email messages right into an Evernote note. Just forward the messages you get to your Evernote address and you've got it captured. By default, emails sent to Evernote go into your default notebook. And did you see that you can add a tag – cool!

Backups: Does Evernote solve your backup responsibility?   Somewhat, but Kerry Scott reminds us: "anything in Evernote is not necessarily captured forever. I love their product and hope that they live long and prosper, but anything I want to keep forever, I convert to PDF. Then I add it to my hard drive, where it's backed up on a Time Capsule (Mac's backup drive), plus two online backup services. I encourage people to keep things in Evernote so they can find them

again, cross-reference via tags and search to look for patterns, etc., but I'd definitely suggest a less platform-specific solution for anything that anyone couldn't afford to lose."

Summary: Some of the best things in genealogists' lives are free! Free apps need to be utilized to determine their usefulness for you. Dropbox was such a good idea that Microsoft introduced OneDrive to store not 2GB, but 15GB free, yet still sync the storage between all your devices – yes, even Macs. Evernote is the searchable sticky notes of the future – especially for genealogists, and even more so for genealogists with a smartphone or tablet and their built-in camera. Searching is enhanced within Evernote documents, and tags are superior to multiple folders. Many references are available today; this Fall look for Kerry Scott's paperback book for genealogists using Evernote.

References: http://michaelhyatt.com/evernote-tags.html and other Evernote blogs by Hyatt.

Evernote.com [tutorials and videos]; http://en.wikipedia.org/wiki/OneDrive;

"*Using Evernote to Improve Your Research*" by Kerry Scott: posted on AbqGen.org;
"*Evernote vs Dropbox: the Pros and Cons of Both*" by Natasha Quinonez posted as Udemy blog;
Tips for Collaborative Genealogy: at **lisalouisecooke.com** in search box, enter: Evernote

[i] A smartphone combines a cellphone with a Personal Digital Assistant in a single device that offers much of the same functionality as a basic computer. Smartphones can be categorized by their makers and their operating system (e.g., Samsung phones use Android, Apple phones use iOS).