



TEAMBRAIN™
Connect Ideas. Collaborate in the Big Picture.

TheBrain Pro Companion Guide for TeamBrain Services

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Welcome to TeamBrain



TeamBrain enables you and your group to work together in a single Brain that's automatically synchronized. You can work from your desktop or online in TheBrain Cloud. This enhanced context generates a powerful and ever evolving thought network, where ideas grow and everyone gets more done.

TeamBrain is designed for easy and fluid knowledge exchange. You have many sharing options. You can control which Brains you want to share or keep private. You can also specify level of access for users. Users can be readers or editors to your Brain.

This collaboration solution lets you use TheBrain's award winning desktop software so you get powerful authoring and information management features. When you make edits on your desktop, simply synchronize your Brain with the Cloud or set it to automatically sync. Now your entire group can benefit from your connections and new ideas!

Conversely, you can author and access your Brain online from any machine for universal access.

Your TeamBrain solution includes both a license for TheBrain Pro and also a secure Cloud account that is enabled with Team Services.

In order to begin using TeamBrain services, each member of the team will need the following:

- TheBrain Pro Desktop Software Download the latest release from www.thebrain.com/download
- A Brain Cloud Account with TeamBrain Services enabled Sign up at www.thebrain.com



All users must be TeamBrain enabled on their Cloud account in order to begin collaborating. To enable TeamBrain services on your account contact support@thebrain.com

About This Guide

This guide covers how to setup and manage your TeamBrain services. For additional assistance with using TheBrain Pro or how to create a Brain, please download TheBrain User Guide at www.thebrain.com/manual or watch our online tutorials at: <http://www.thebrain.com/tutorials>

TheBrain also offers free web training every Tuesday and Friday. Sign up at <http://www.thebrain.com/101>

Managing Your TeamBrain Subscription

TeamBrain administration and online access is done through your account page located on TheBrain Cloud. You can access your account from <http://www.thebrain.com>

Creating Your Brain Cloud Account

1. Go to www.thebrain.com.
2. Click the **Sign Up** button in the top-right area of the page.

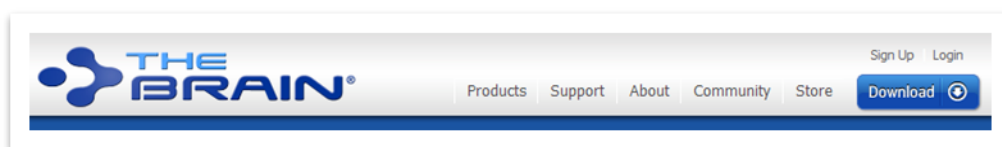


Figure 1. Sign Up for a Cloud Account

3. Enter your new account information.
4. Follow the instructions on the confirmation email that you will receive to finish activation. Return to www.thebrain.com to login.

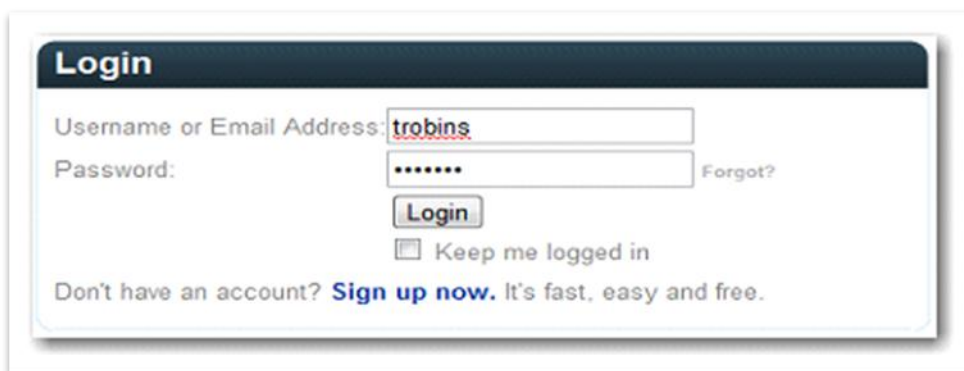


Figure 2. Logging into TheBrain Cloud



If you forget your password, click the **Forgot?** link next to the password field, enter your email address and a password reset URL will be sent to your email.

Navigating Your Cloud Account

Several important options are displayed near the top of the page. Most notably, the Account page and Team page



Figure 3. Navigating Your Cloud Account

1. **Account Page:** This is the main page where your uploaded Brains will appear

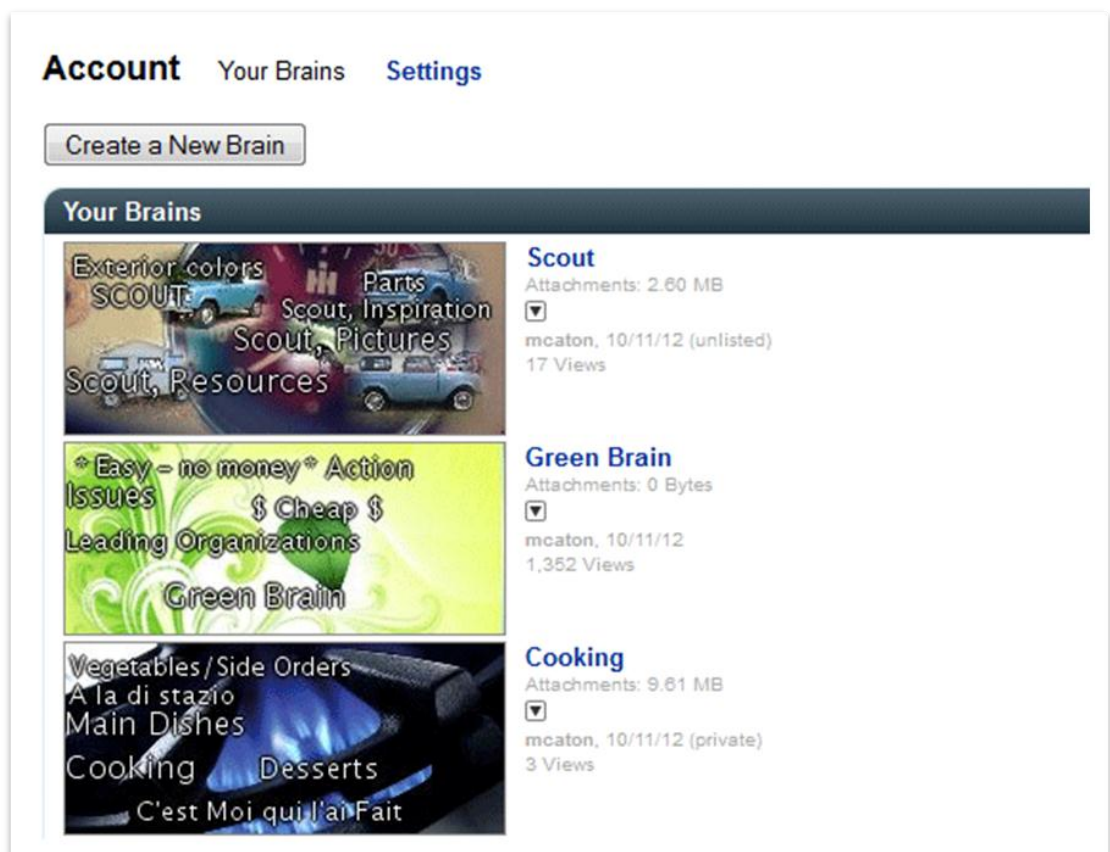


Figure 4. Your Account Page

Setting up Your Team – Assigning TeamBrain Licenses to Users

TeamBrain includes online group administration features so you can manage your group. If you are set up as a TeamBrain License Administrator, you are responsible for assigning and reassigning TeamBrain licenses. You can assign and reassign users at any time. If users change throughout the year, you can easily reassign the license to a new user.

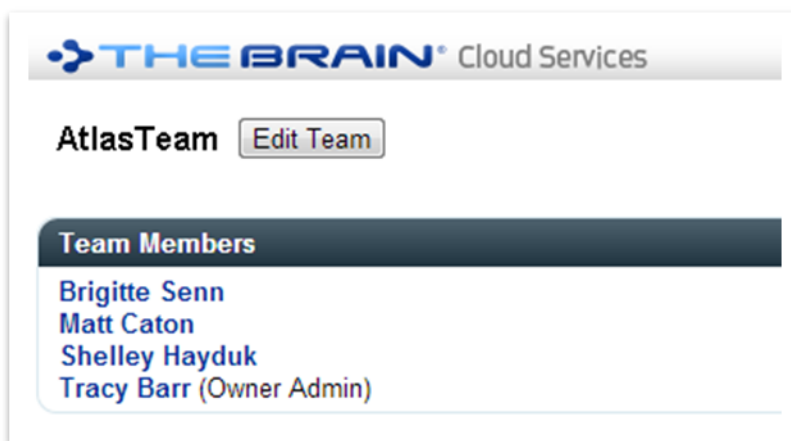


Figure 5. Team Administration

1. After you log into your Cloud account, click on the **Team** page from your top menu. By default, you should be taken to this page upon log-in.
2. Your Team Name will be displayed. If you already see your Team members listed here, this means your team was set up by your Brain specialist. However, if a user changes or the users need to be assigned:
3. Click on “Edit Team”

Edit Team

Name

Atlas Team

Description

The Atlas Team will be using TheBrain for collaboration on all new Sale

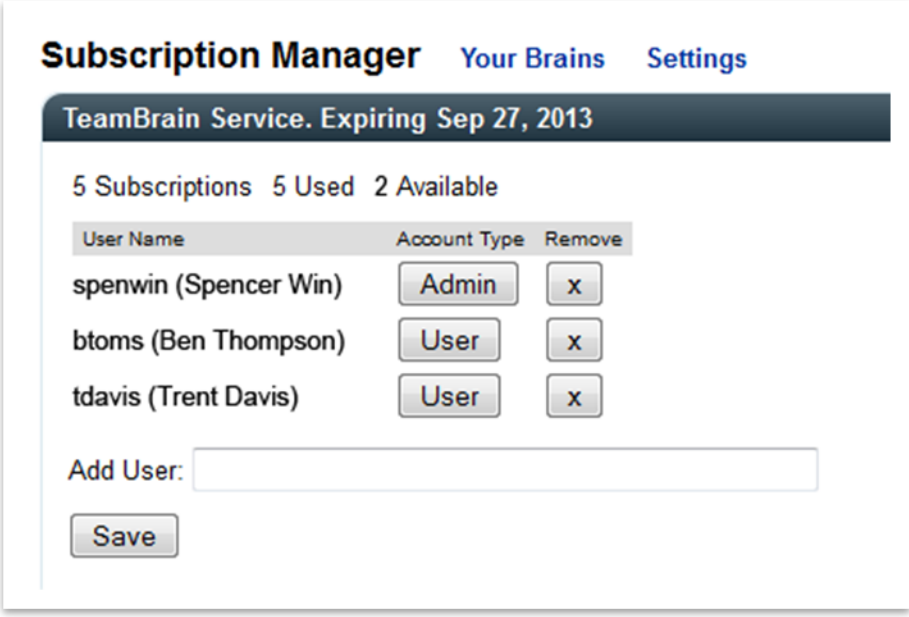
Team Members

Brigitte Senn
Matt Caton
Shelley Hayduk
Tracy Barr

Use the [Subscription Manager](#) to add or remove team members.

Figure 6. Edit Team Window

4. Click on “Subscription Manager”
5. Here you will see how many Used and Available Subscriptions you have. If you have available subscriptions, you can give a subscription by typing the email address of the new user in the “Add User” field. You can also remove a subscription by clicking on the “x” next to the User Name. You can add someone as a User or Admin - Click in the “Account Type” field next to the User Name to toggle between “User” to Admin”. By choosing Admin, the user will be allowed to assign and reassign other TeamBrain subscriptions.



The screenshot shows the 'Subscription Manager' interface. At the top, there are links for 'Your Brains' and 'Settings'. Below this, a dark bar indicates 'TeamBrain Service. Expiring Sep 27, 2013'. A summary line shows '5 Subscriptions 5 Used 2 Available'. A table lists three users: 'spenwin (Spencer Win)' with 'Admin' type, 'btoms (Ben Thompson)' with 'User' type, and 'tdavis (Trent Davis)' with 'User' type. Each user has a 'Remove' button with an 'x'. Below the table is an 'Add User:' text box and a 'Save' button.

User Name	Account Type	Remove
spenwin (Spencer Win)	Admin	x
btoms (Ben Thompson)	User	x
tdavis (Trent Davis)	User	x

Add User:

Figure 7. Subscription Manager



In most cases your Team was set up initially by a Brain Specialist. In this case, the following instructions would be applicable only if a new team member needs to be assigned.

6. After you assign a TeamBrain subscription to a new user, this person will receive a notification email. This email will tell them that their account has been upgraded to TeamBrain. If this person is new to TeamBrain, then this email will also give easy instructions for setting up an account.

Synchronizing Your Brain from Your Desktop

If you have started a Brain locally from your desktop, you will want to sync to upload this Brain securely to your own Cloud account. Remember, no one has access to this Brain other than yourself at this point.

1. To synchronize your first Brain, open TheBrain. Click the **File** menu, then click the **Synchronize with TheBrain Cloud Services** option.
2. TheBrain toolbar also has a **Synchronize with TheBrain Cloud Services** button.

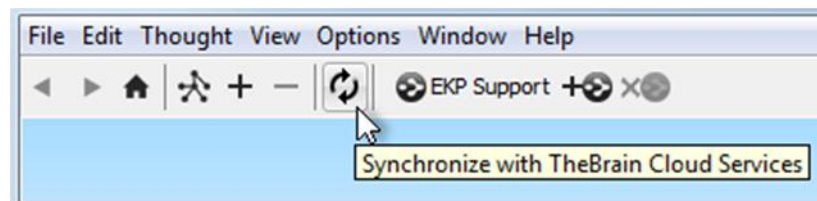


Figure 8. Synchronize with TheBrain Cloud Services Button



You will be the owner of this Brain and the one responsible for managing user access to this Brain.

3. Enter your user name (or email address) and your password. Optionally, select a synchronization option (as described below).
4. Click the **OK** button.

Synchronization Options

You can set your Brain to automatically sync, or you can initiate a synchronization at any time.

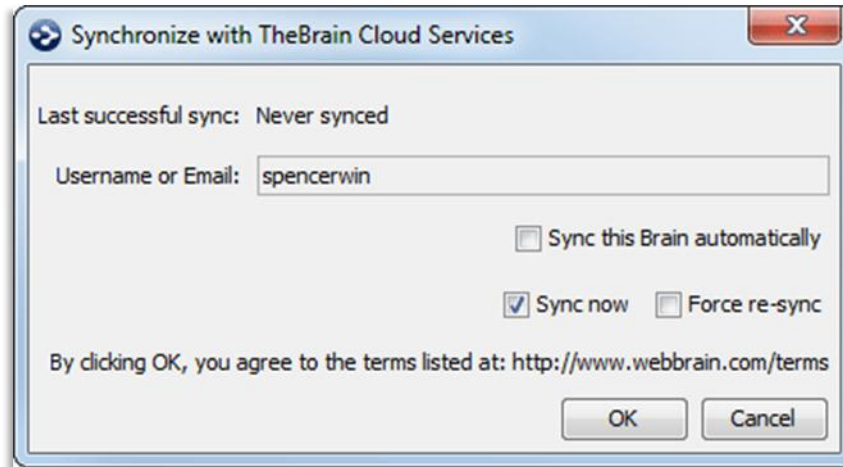


Figure 9. Synchronization Window in TheBrain

For real-time collaboration, it is recommended that you select the **Sync this Brain automatically** check box to set your Brain to synchronize automatically.

Next, now that you have synced your Brain to your private account, you can login to your account and set up who you want to share this Brain with.

Accessing Your Brain Cloud Account

1. Go to www.thebrain.com.
2. Click the **Login** button in the top-right area of the page.

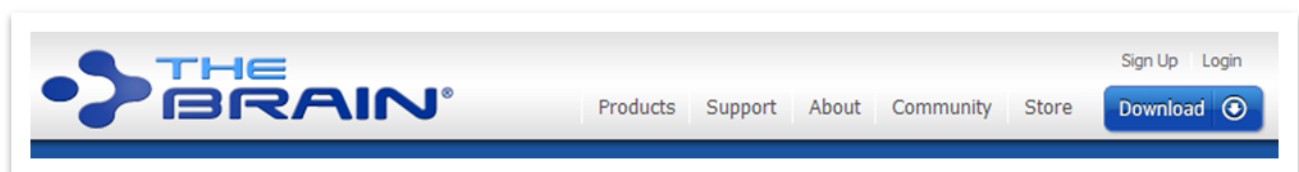


Figure 10. Logging into TheBrain Cloud

3. Enter your user name.

Access Controls and Permissions for Sharing

Your Brains are listed on your Account page under “My Brains.” To edit a Brain’s Access Control settings:

1. Click the downward facing arrow under your Brain’s name, then choose **Settings**.



Figure 11. Published Brains on the Account Page

2. Under Access Control, you can choose Brain Visibility and User Roles.

Selecting a Visibility Option for Your Brain

When you first sync a Brain, the default setting is always set to **Private**. However, if you want to share a Brain on the public web or even embed a Brain onto your site, you can change the visibility.

In the **Access Control** section, select a Brain Visibility option of your choice or leave as private:

- | | |
|-----------------|---|
| Public | ▪ Everyone will be able to find and view this Brain |
| Unlisted | ▪ Everyone will be able to view this Brain but it will not appear in a list of search results |
| Private | ▪ This Brain will only be visible to people to whom you have assigned user roles |

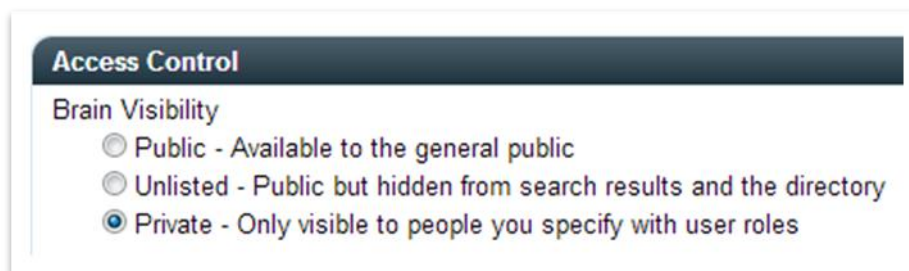


Figure 12. Setting Your Brain's Access Control

Adding User Roles to your Brain

1. Under **User Roles**, you can “Add user:” or “Add team:”. When you select “Add all Team members” this will instantly give all Team members Reader access to this Brain.
2. To add a user, type the user name or email address of the person you want to give access to into the “Add user:” field.
3. To add users that are not members of your team, uncheck the “Only Show Members of Team” box.



As you type, a list of possible matches will appear. Select from this list or type any email address. Press the **Enter** key or click on the correct match. The user name or email address will be added to the **User Roles** box.

4. By default, the new user will have “Reader” access, meaning the person will be able to view but not revise content. To grant permission to make changes, click the **Reader** button next to the user’s name (or email address).

The **Reader** button works as a toggle. When you click it, it changes to “Editor.” Clicking the **Editor** button changes the user’s role back to “Reader.” The current appearance of the button displays the user’s currently assigned role.

Access Control

Brain Visibility

☐ Public - Available to the general public

☐ Unlisted - Public but hidden from search results and the directory

☒ Private - Only visible to people you specify with user roles

User Roles

User Name	Role	Remove
mcaton (Matt Caton)	Administrator	x
lorbloom (Lora Caton) (not a team member)	Editor	x

Add user:

☒ Only show members of TheBrain Team (5 people)

Enter a name, email address, or username and select a match from the list that appears.

Add team:

Figure 13. Access Control on the Settings Page

- Once you have added user names and changed role assignments as appropriate, click the **Submit** button at the bottom of the page. That's it!
- Each person that you have just added will receive an automatic email message notifying them that they have been given access to your Brain. This email will come from no-reply@thebrain.com



Keep in mind that if you add an Editor, he or she must have a TeamBrain Subscription to download your BrainZip and collaborate. A Reader can be added at any time and this does not require TeamBrain.

- Team Page:** Now that you are sharing a Brain, it will also appear on your Team page. You will navigate to your Team page whenever you want to access Brains that are being shared amongst your Team members.

Accessing a Shared Brain

When someone gives you access to their Brain in order to get started, you will need to log into your Cloud account. On your "Team" page, you will see this

Brain listed. If you have any Brains of your own that have not been shared, they appear on your “Account” page.

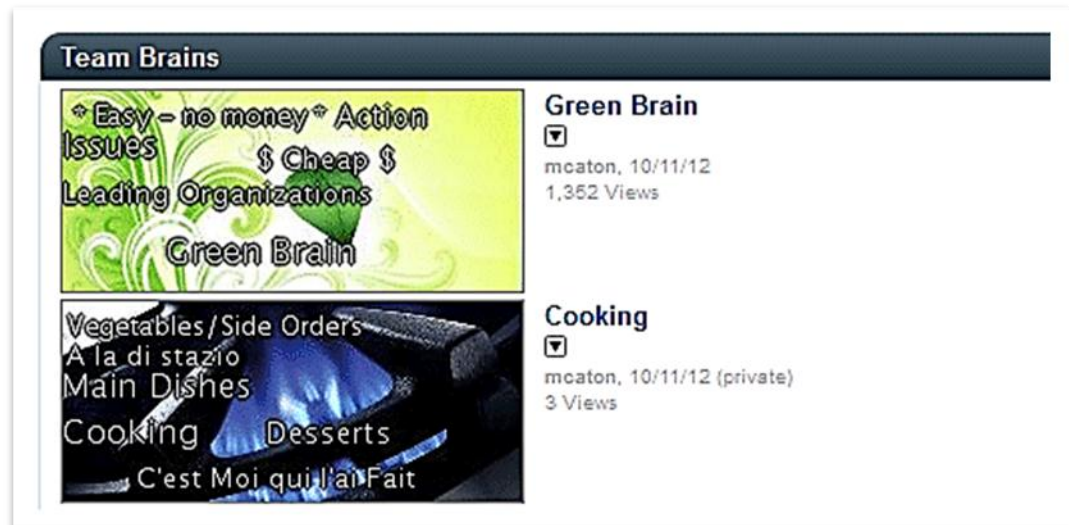


Figure 14. TeamBrain List

If you have been given Editor access you can choose to download the BrainZip to run this Brain locally from your desktop, or you can choose to open it in the browser. To download the BrainZip, click on the small downward facing arrow under the name of your Brain and select BrainZip. Once you have completed downloading the BrainZip, you can then run this Brain from your own desktop and synchronize your own changes back to the Cloud.



Users who are granted Reader access will not have the option to download the BrainZip.

Viewing Changes

TeamBrain tracks all changes and modifications made by your group. To view what changes have been made:

1. Open your Brain in TheBrain desktop and go to the “Reports” tool.

2. Make sure that “All” is selected in the first drop-down list.
3. Select the **Modification detail** check box.

You will see what Thoughts have been modified, when, and by whom.

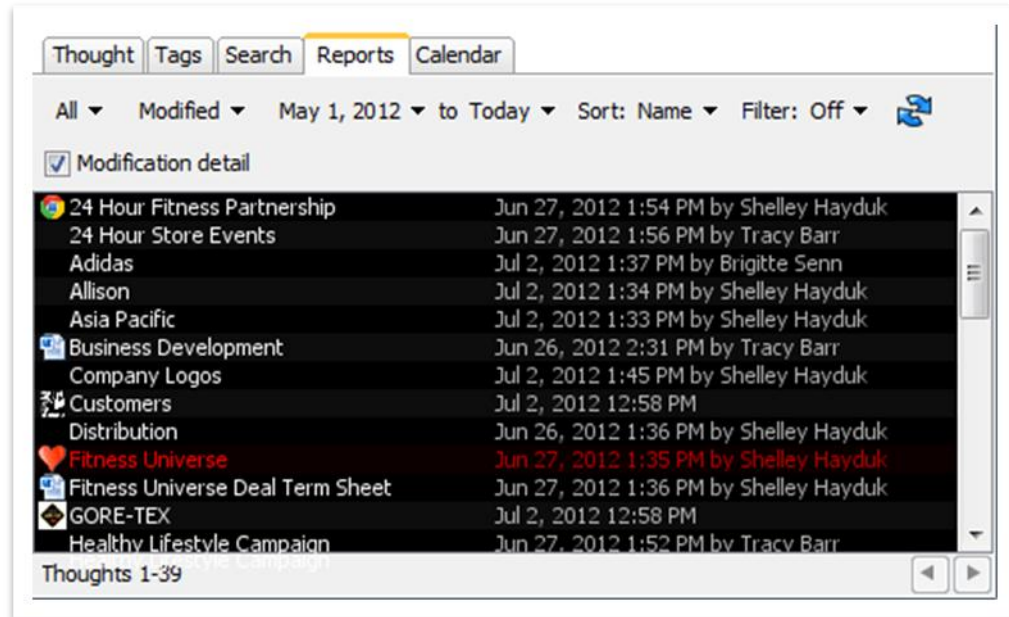


Figure 15. Modification Detail in TheBrain Reports

Working with Brains in the Cloud

From your Account page, you can “Create a New Brain” or work with any of your existing Brains you started from your desktop and have uploaded to the Cloud.

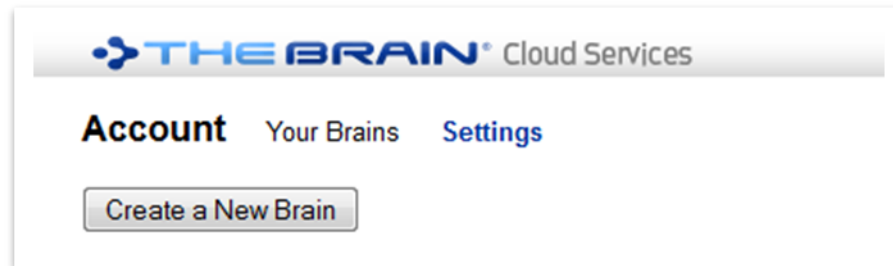


Figure 16. Create a New Brain

To open an Existing Brain: Click on the name of the Brain or on the thumbnail preview. This will open the Brain in your browser.

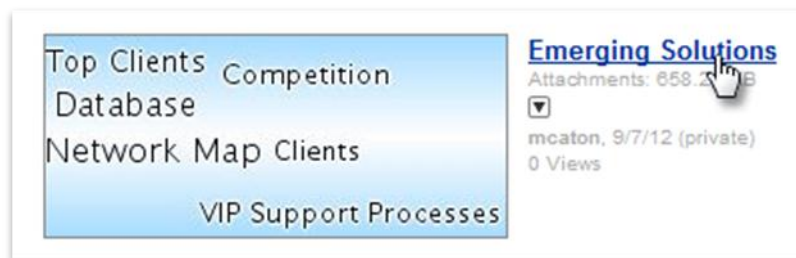


Figure 17. Open a Brain

1. Click to navigate your Brain just like you would on your desktop.
2. Create Thoughts: Drag from the Thought Gate to quickly create a new Parent, Child or Jump Thought.
3. Add Notes, Attach files and Web pages: After Thought is created, add Notes to quickly jot down that new idea, or upload those file attachments and/or Web pages instantly for your Team to access.

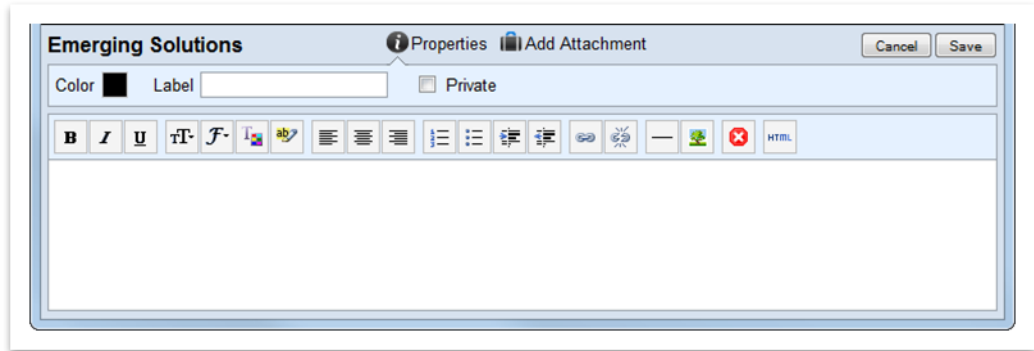


Figure 18. Edit Thought Content

Downloading Online Brain for Local Use

Keep in mind you can download any Brain from your Cloud account (unless you have only been given Reader access) to take with you offline or to download onto a new computer.

There are two different ways to download a Brain from TheBrain Cloud for local use.

From TheBrain Application

1. Open TheBrain application on your computer. If another Brain is already loaded, click the **File** menu, then the **Close Brain** command. From the list of available Brains, find the Brain that is located on TheBrain Cloud that you wish to download. Click the down-arrow next to **Online**, then click the **Download for Local Use** command.

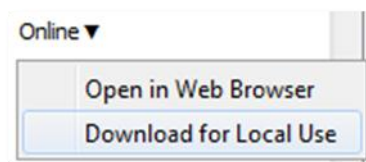


Figure 19. Download for Local Use

From TheBrain Cloud

1. Log into your Brain account at www.thebrain.com, then click the **BrainZip** link next to the Brain of your choice.



Figure 20. Downloading a BrainZip File from the Cloud

2. Click the **Download** button.

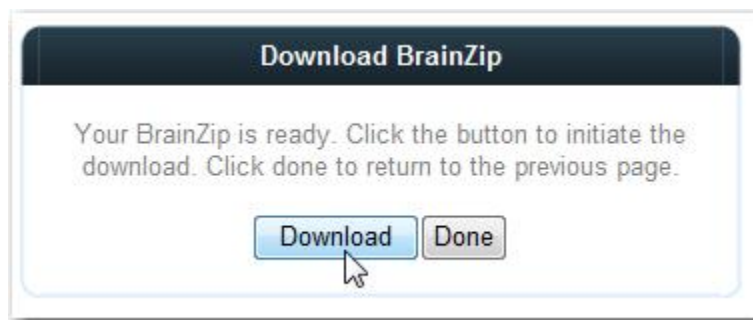


Figure 21. Downloading a BrainZip File

3. Navigate to the location of your choice, then click the **Save** button in the **Save As** window. When the process is complete, click the **Close** button. You may log out of TheBrain Cloud at this point.
4. In TheBrain, open the BrainZip by clicking the **Open** command on the **File** menu, navigating to the BrainZip of your choice, then clicking the **Open** button.

Additional Support Resources

Technical Support:	Call: 310-751-5000 Between 8:00 am – 5:00 pm Pacific Time Email: support@thebrain.com
Online Tutorials:	http://www.thebrain.com/tutorials
Online Classes and Webinars	http://www.thebrain.com/community/events/



For comprehensive listing of resources go to <http://www.thebrain.com/support/>