



## **Transitioning to TheBrain Version 10**

November, 2018

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# Table of Contents

<b>Introduction</b> .....	<b>2</b>
About this Guide .....	2
<b>BrainBox</b> .....	<b>3</b>
Accessing BrainBox .....	3
Sending Web Pages to BrainBox .....	6
Sending Files to BrainBox .....	7
<b>Visible Types and Tags</b> .....	<b>8</b>
Hiding Visible Thought Types .....	8
Converting to Type or Tag .....	9
<b>Tag Enhancements</b> .....	<b>9</b>
Clickable Tags .....	9
Replace Tag .....	9
Nested Tags .....	10
Additional Tag Updates .....	10
<b>Presentation Mode</b> .....	<b>11</b>
<b>Dark Mode</b> .....	<b>12</b>
<b>Search Improvements</b> .....	<b>13</b>
<b>Find and Replace</b> .....	<b>13</b>
<b>Export</b> .....	<b>15</b>
<b>Additional Improvements</b> .....	<b>16</b>
Notes Improvements .....	16
Improved Properties Dialog .....	17
Improved Thought Creation Dialog .....	17
User Interface Improvements .....	18

# Introduction

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Introducing our most powerful release yet. TheBrain 10 is designed for fast, easy knowledge capture and organization. Building upon the ground up redesign of TheBrain 9, version 10 enhances your access to information in all aspects of the software.

TheBrain 10 new features include:

-  BrainBox
-  Visible Types and Tags
-  Instant Tag Access
-  Presentation Mode
-  Dark Mode
-  External Attachment Search
-  Additional Export Options
-  And many other enhancements ...

A video overview of these features is available at [Introducing TheBrain 10](#)

<https://www.thebrain.com/products/thebrain/thebrain10>

## About this Guide

This guide covers the new features and changes in TheBrain 10 that have been made since version 9. It is intended for people who are already familiar with version 9.

# BrainBox

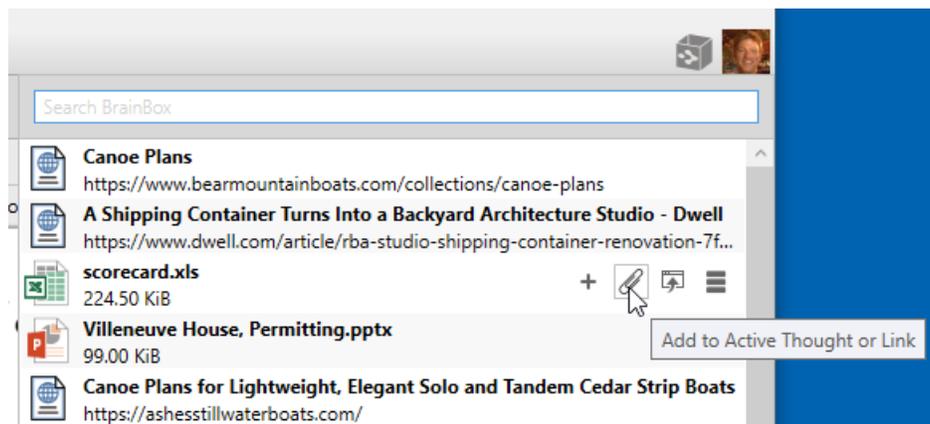
BrainBox lets you send information to your Brain quickly and easily. Just click the icon in the top-right corner of TheBrain for Windows or macOS for instant access. Use BrainBox for adding information on the go, from your desktop, from the web, anything that you want to quickly capture into your Brain, to be categorized later.

## Accessing BrainBox

### The BrainBox Button

At any time, when you have a Brain open, use the BrainBox button in the upper right hand corner of the window to add previously captured content into your Brain.

1. Click on a Brain to open it.
2. Navigate to the desired thought where you want to add your content.
3. Click on the BrainBox icon to display its content.

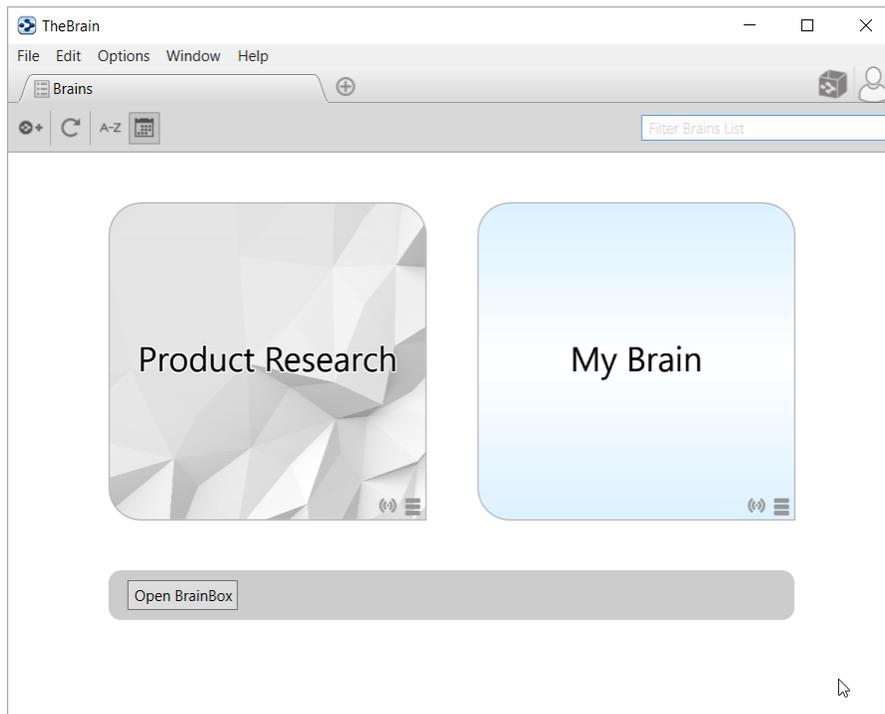


**Figure 1. The BrainBox Button**

4. From here, the file or web page can be:
  - Added as an internal attachment on a new child thought below the current active thought. The new thought name will be the file or web page name
  - Added as an internal attachment to the active thought
  - Opened in its default application
  - Renamed, deleted and other actions applied from the context menu button

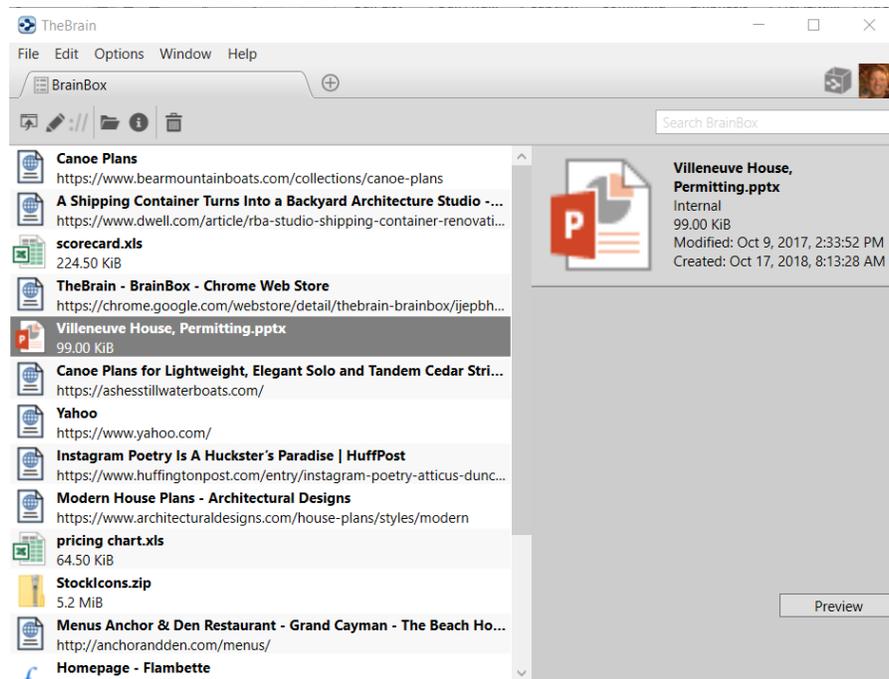
## The BrainBox Tab

An alternative way to view and manage the content of your BrainBox is available by opening BrainBox in its own tab. When you create a new tab, at the bottom of the Brains list, you'll see the Open BrainBox button.



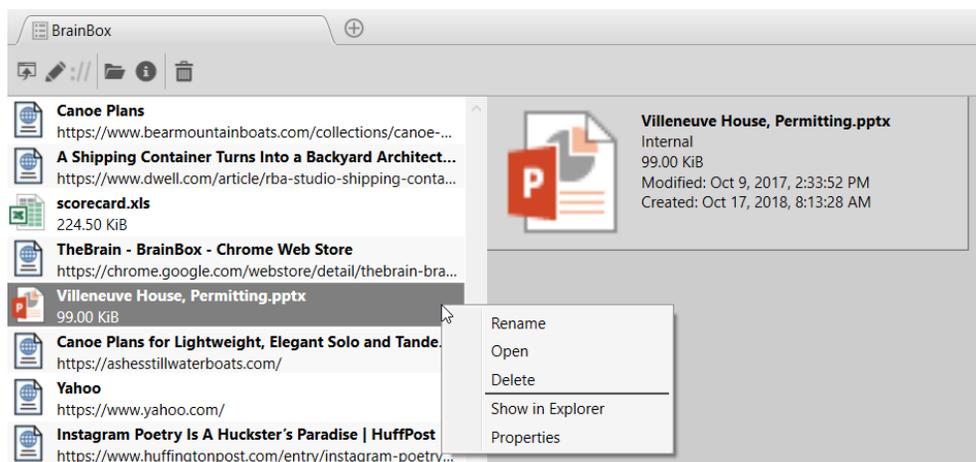
**Figure 2. The BrainBox Tab**

Click the **Open BrainBox** button to open BrainBox in its own tab.



**Figure 3. The BrainBox Tab**

Use the BrainBox tab to review, edit or delete existing content in your Brainbox.



**Figure 4. Editing the Content of BrainBox**

1. Select an item listed in the BrainBox.
2. Use the toolbar button or right-click to show the context menu to:
  - Open item in its native application for preview
  - Edit the file or link name

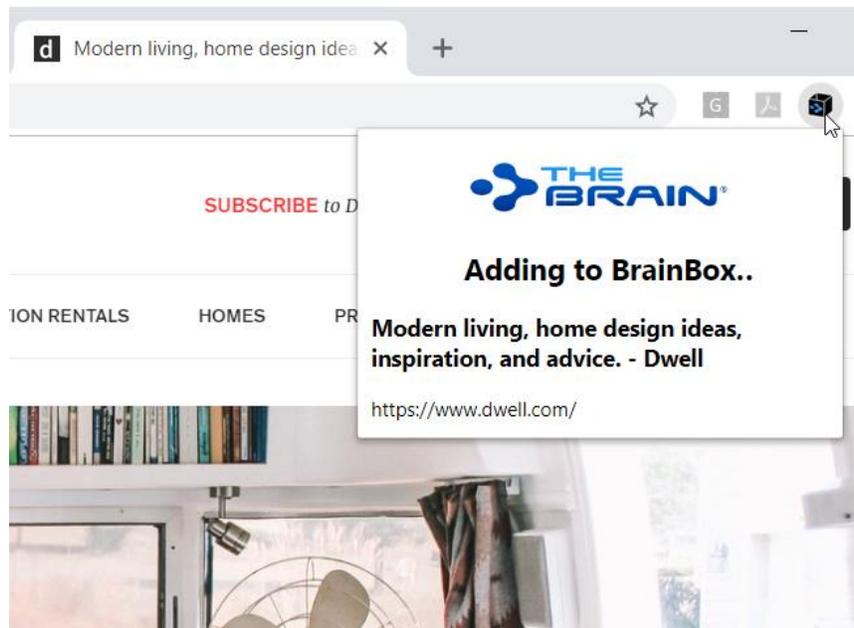
- Edit the URL
- Open in Explorer or Finder
- View the item properties
- Delete the item from your BrainBox

## Sending Web Pages to BrainBox

Add information from any web browser with a single click. When you find a page you want to capture to be organized later in TheBrain, just click the BrainBox extension button or bookmarklet (depending on your browser).

You must be logged into your Brain account at <https://app.thebrain.com> in the browser you are using in order for the web page to be successfully added into your BrainBox. If you are not logged in, clicking on the BrainBox extension from your browser will prompt you to do so in the status screen. Once you have logged in, return to the desired web page and click the BrainBox button again.

You can use the browser extension or bookmarklet from any computer, even if TheBrain application is not installed on that device.



**Figure 5. Clicking on the BrainBox Extension**

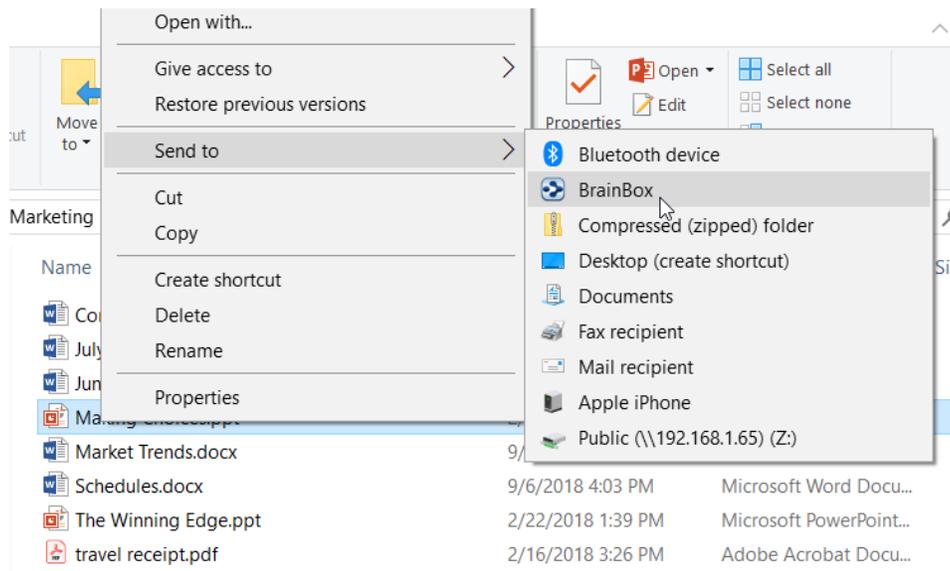
To install the BrainBox extension in your preferred browser visit <https://www.thebrain.com/docs/brainbox> and follow the instructions there.

## Sending Files to BrainBox

Send copies of individual files into your BrainBox to be organized and associated with thoughts at a later time. No additional set up for this feature is required.

### Windows File Explorer *Send to* Integration

From Windows File Explorer, right click on any file and select *BrainBox* from the *Send to* submenu. TheBrain will be started if it is not already running and the file will be added to BrainBox. To setup the Windows File Explorer integration, install and run TheBrain 10.



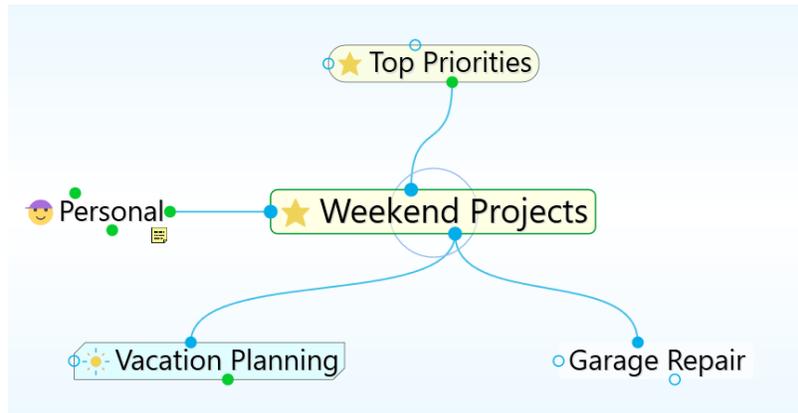
**Figure 6. Sending a File to BrainBox**

### macOS Dock Drag and Drop

Launch TheBrain application if it is not running already. From any Finder window, drag and drop any file to TheBrain icon in the macOS Dock. The file will be added to BrainBox. You can also drag the icon from the title bar of many macOS apps.

## Visible Types and Tags

Types and tags can now be visible in the plex. Want to see a type or tag as a child thought? Just link any existing type or tag thought as a child, or as a jump. Types are now optionally visible as parent thoughts as well.



**Figure 7. Visible Parent Type and Child Tag**

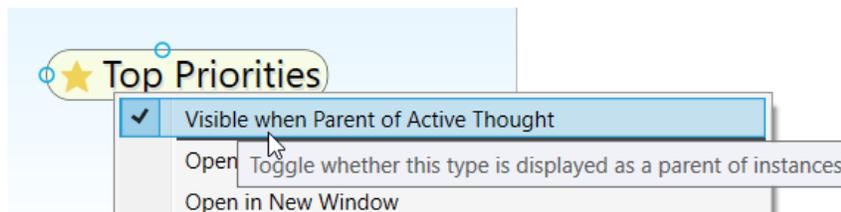
Linkable types and tags eliminate the need to create two thoughts when you want to show all instances of a type or tag within the plex.

- Types are visually distinguished by rounded sides.
- Tags are visually distinguished by chamfered corners.

### Hiding Visible Thought Types

Thought types being visible in the plex is optional.

- To prevent a thought type from being visible in the plex, right click on a thought type and uncheck the option for **Visible when Parent of Active Thought**

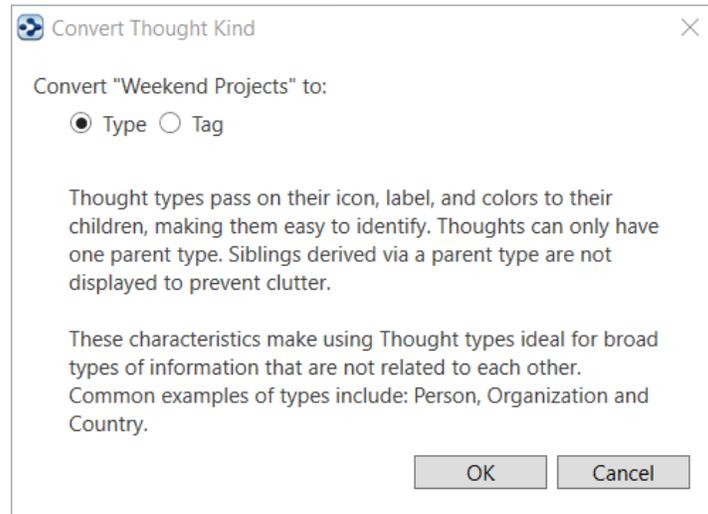


**Figure 8. Toggling the Visibility of a Thought Type**

## Converting to Type or Tag

You can easily change a normal thought into a type or tag at any time:

- Right click on a thought and select Convert to Type or Tag



**Figure 9. Convert to Type or Tag**

- Additionally, tags and types can be changed into a normal thought

## Tag Enhancements

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### Clickable Tags

Tag icons that show on thoughts are now clickable. Click any tag that is visible in the plex to navigate to that tag thought.

### Replace Tag

The Replace Tag feature allows you to quickly move a thought through a project cycle or simply re-classify its tag attributes. To quickly replace a thought's tag:

- Right click on a tag to open its context menu
- Select the option **Replace Tag with** and select another tag

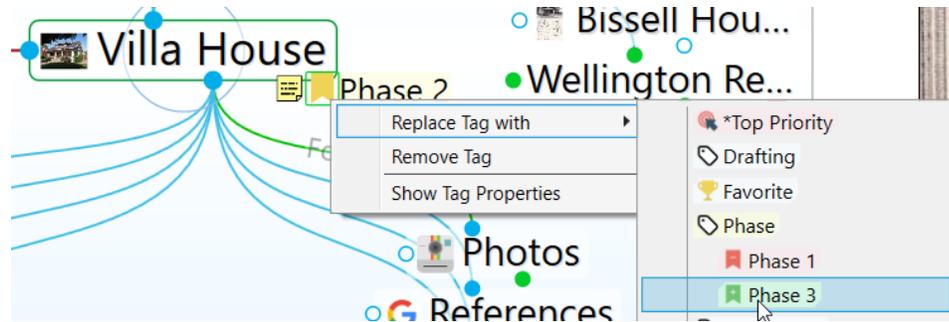


Figure 10. Replacing a Tag

## Nested Tags

Tags can be organized under each other so they are easier to organize, navigate and apply.

- Link two existing tags with a parent/child relationship to subcategorize
- You may also open a tag's properties to assign it as a sub category of another tag
- Nesting can include multiple tags and multiple layers



Figure 11. Nested Tags

## Additional Tag Updates

- Tags Can have background colors associated with them:

- Right click on a tag to open its Properties
- Colors may be selected for the tag's text and/or background
- Tags can be applied to types

## Presentation Mode

Presentation mode makes your Brain full-screen, hiding the title bar, menu bar, toolbar and Brain tabs. On both Windows and macOS the taskbar and dock are also hidden. Presentation mode is an excellent viewing option when using your Brain for effective and focused discussions.

- Enter Presentation Mode by selecting it from the View menu
- Keyboard shortcuts can be used for functionality that is hidden from the current view, such as switching amongst open Brain tabs without exiting Presentation Mode
- Just start typing to search and the controls appear and disappear as needed.

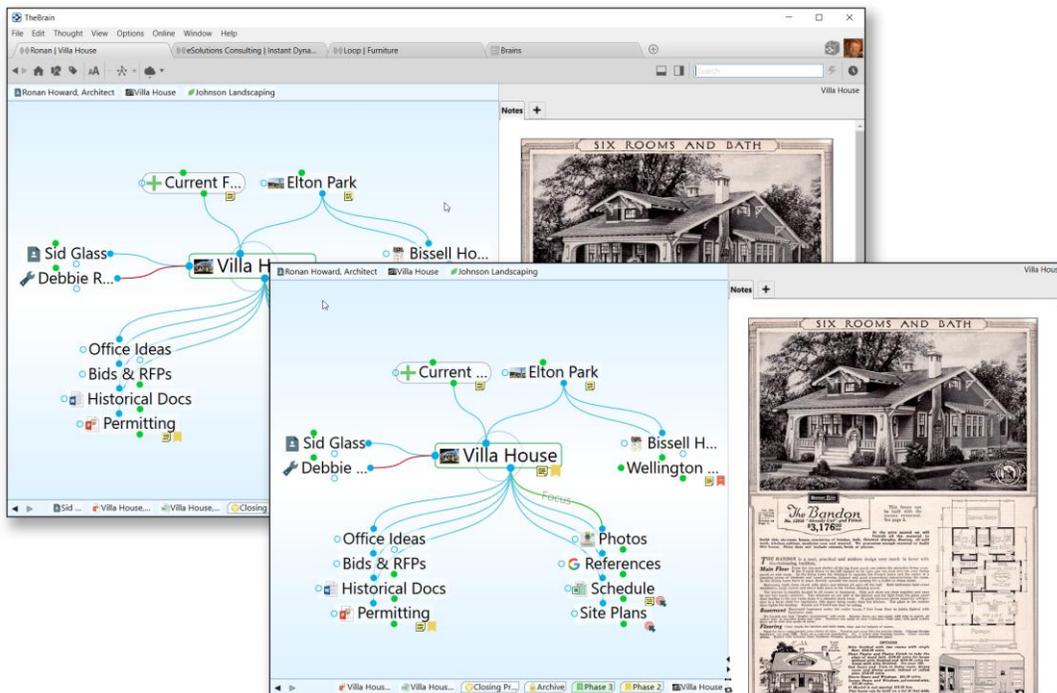


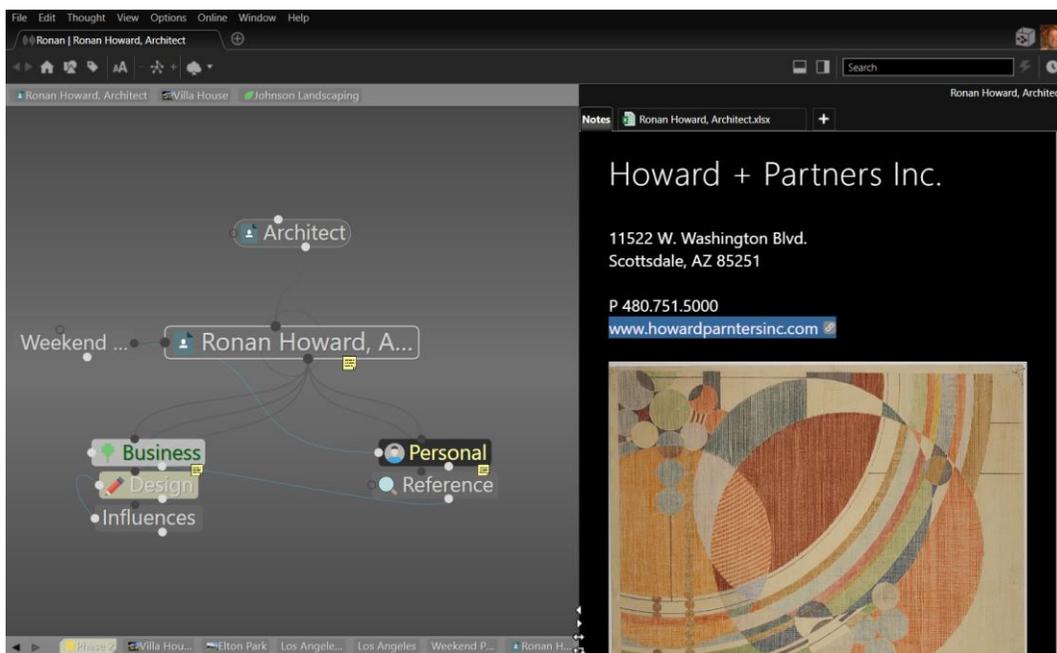
Figure 12. Before and after switching to Presentation Mode

## Dark Mode

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The all new Dark Mode changes the windows, menus, icons and other user interface elements to be predominantly dark grey. Dark Mode allows you to focus on your work with subtle colors and fewer distractions.

- To switch to Dark Mode, open Preferences to the Look and Feel tab. Select Dark under the User Interface setting
- TheBrain will be restarted to apply the change



**Figure 13. TheBrain in Dark Mode**

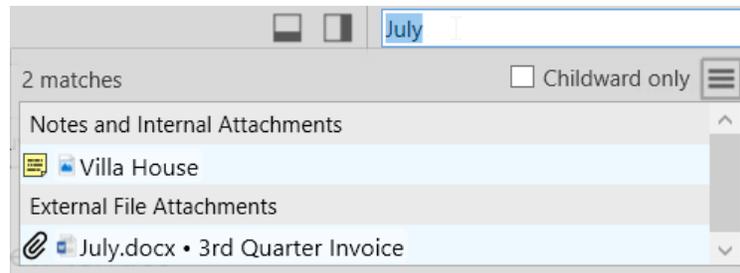
- You may want to modify your Brain Theme to compliment the darker interface and tones

# Search Improvements

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Search now has several additional capabilities that are automatically enabled.

- External attachments are included in search results
- Search using automatic acronyms (ex. find "New York Stock Exchange" by typing "nyse")
- Search for thoughts starting with punctuation. You may use this as a shortcut to provide fast access to thoughts that you always start with a certain type of punctuation. For example, you could use this for people (@Mike, @Sally, @Debbie, etc.) or projects (#Ridgeline, #Palmdale, #Westly, etc.)



**Figure 14. Search Finding External Attachments**

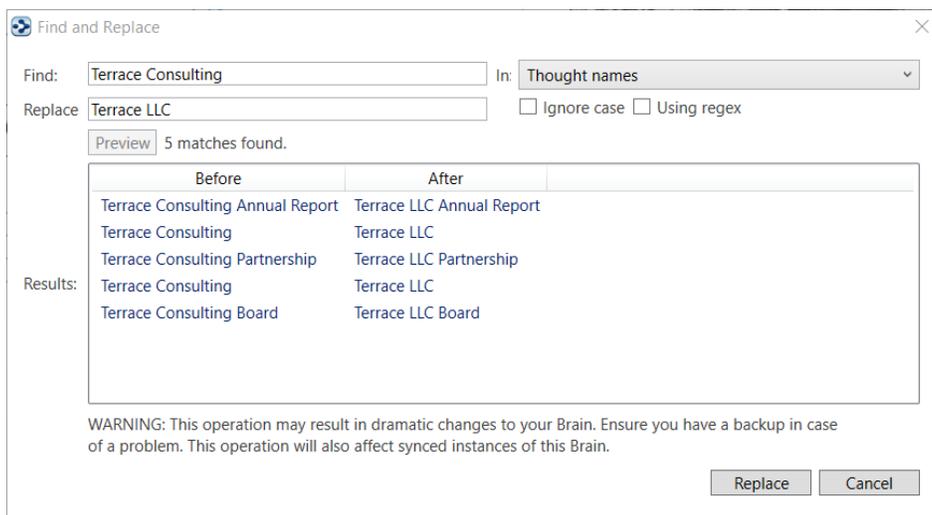
# Find and Replace

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Find and replace all occurrences of text within thought names and labels, link labels, external attachment paths and URLs

- Includes support for regular expressions
- Changes are undoable, however it is still highly recommended that you create a Brain Archive (.brz) prior to performing a large Find and Replace operation on an important Brain
- To start, select Find and Replace from the File menu under Utilities
- Enter the text to be replaced and the text to replace it with
- Specify where the text occurs. The available locations are:
  - Thought Names

- Thought Labels
  - Link Labels
  - External Attachment Paths
  - Attached URLs
- Use the checkboxes to specify whether letter case is to be ignored and if you want to use regex (regular expressions, which allow sophisticated pattern matching capabilities)
  - Preview your results prior to executing the change and click Replace when ready



**Figure 15. Find and Replace**

# Export

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TheBrain 10 features several all-new export options. Export your Brain data directly to:

- **Folders** - Exports the thoughts in your Brain by converting them to a folder hierarchy.
  - Each thought becomes a folder
  - File attachments and notes (saved as .html files) will be contained within the appropriate thought folder
  - The folder structure attempts to mimic the parent-child relationships between thoughts with parentless thoughts at the top level
  - Shortcuts on Windows and symbolic links on macOS are used to represent thoughts that are under multiple parents
- **Text Outline** (.txt file) - Creates a text outline of thoughts, notes and URLs.
  - Indented hierarchy mimics parent-child relationships between thoughts
  - Notes are exported as lines starting with a - (dash)
  - URLs are added lines starting with a + (plus)
- **JSON Files** - Exports your Brain data in JSON format.
  - Thoughts, links and other types of data are each exported in their own .json file
  - Attachments and notes are exported into folders based on the ID of the thought or link they are attached to
  - This gives you access to 100% of your data in an open and easily parsed modern text format

To export your Brain:

- Select Export from the File menu
- Select the output (Folders, Text or JSON) and click on Export
- The output location must be an empty directory

To export just a portion of your Brain, add thoughts first into TheBrain's Selection box and then check the option to **Only export the selection** in the Export window.

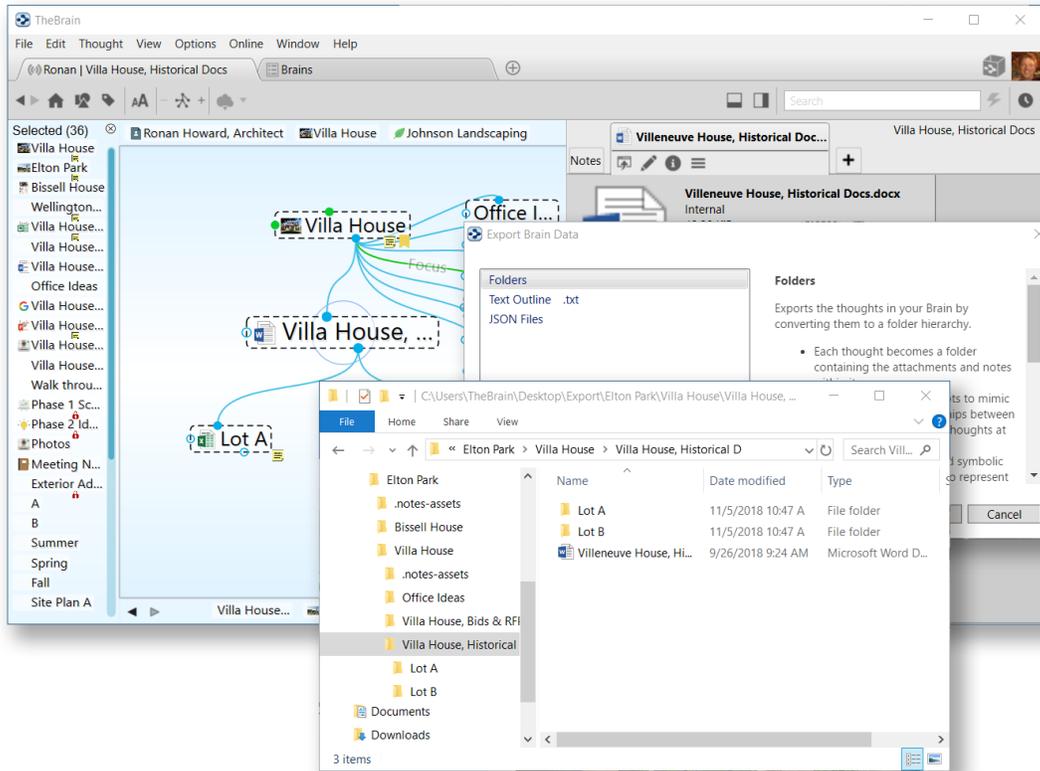


Figure 16. Exporting a Brain to Folders

## Additional Improvements

There are many more small (and not so small) improvements in TheBrain 10.

### Notes Improvements

A preference has been added to control the effect of the Enter key to either create a single line break or a paragraph break.

- Open Preferences and click on the Behavior Tab
- Next to **For new notes, Enter inserts a:** select either Single Line Break or Paragraph Break

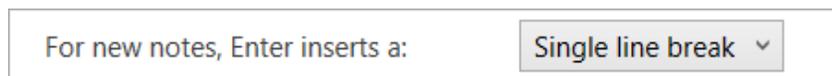


Figure 17. Note Spacing Options

Insert thought link button enables searching for a thought and no longer requires that the selected text match a thought name exactly.

- Select desired text or place cursor where a new link should appear and click on the Insert Link to Thought button in the notes tool bar

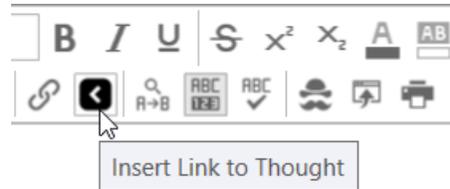


Figure 18. Insert Link to Thought

## Improved Properties Dialog

All inherited properties, such as from a thought type's icon, label or colors, are displayed in the properties dialog.

Thought types or tags are indicated clearly in the dialog

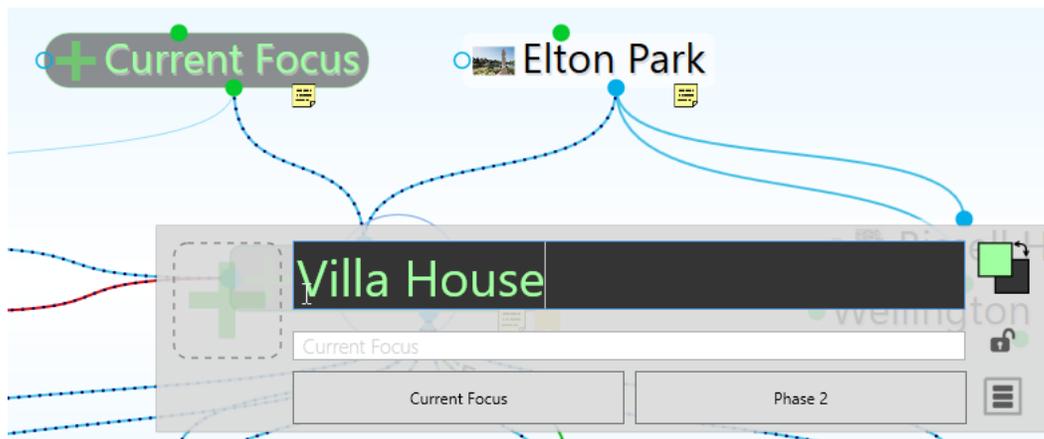


Figure 19. Properties Dialog Improvements

## Improved Thought Creation Dialog

Existing thought matches are displayed even when using the semicolon to create multiple thoughts.

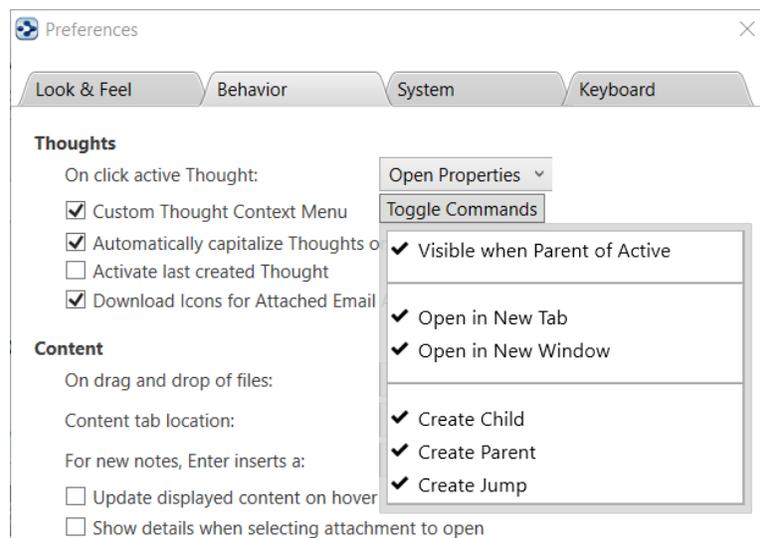
Link to multiple existing thoughts by typing a semicolon. After selecting a thought from the existing thought list, place the cursor back in the thought creation dialog and continue typing to add additional thoughts. This also allows the option to create both new thoughts and link to existing thoughts at the same time.

Assign tags to existing thoughts as part of the link process.

## User Interface Improvements

There have been several enhancements in the user interface such as:

- Resizable Reports
- Customizable thought context menus let you eliminate unused commands
  - Open Preferences and select the Behavior tab
  - Check the option for Custom Thought Context Menu
  - Click on Toggle Commands and uncheck options that you would like to have hidden



**Figure 20. Custom Thought Context Menu**

- Context menus added to search results, reports and type/tag navigation lists
- Duplicate Tab command
  - Right click on a brain tab to duplicate it, showing the same content