# VERSION 11 USER GUIDE

Companion for using Version 11 of TheBrain for Windows and macOS.
Posted May 2020

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# Introduction

Welcome to TheBrain™, your ultimate digital memory and no limits mind mapping software. Intelligence comes from the mind's ability to think associatively—that is, to leap from Thought to Thought, building webs of greater and greater complexity, until new ideas are built. Associations are our inspirations. TheBrain allows you to organize your information in the same way, without limiting you to a pre-determined file structure. In fact, with your digital Brain there are no limits. You can create a small project-focused Brain or grow your Brain to hundreds of thousands of Thoughts!

Now you don't have to force any idea or project into a single folder. TheBrain organizes information as **Thoughts**. Unlike folder directories and search lists, a "Thought" in your Brain can have many connections and contexts. Moreover, TheBrain displays your Thoughts by concept or project, linked according to how you think. Now you can get the big picture and discover information that might otherwise be overlooked.

Thoughts contain relevant notes, web pages, and files. Brains can be synced for easy access from your desktop to TheBrain Cloud or your mobile devices.

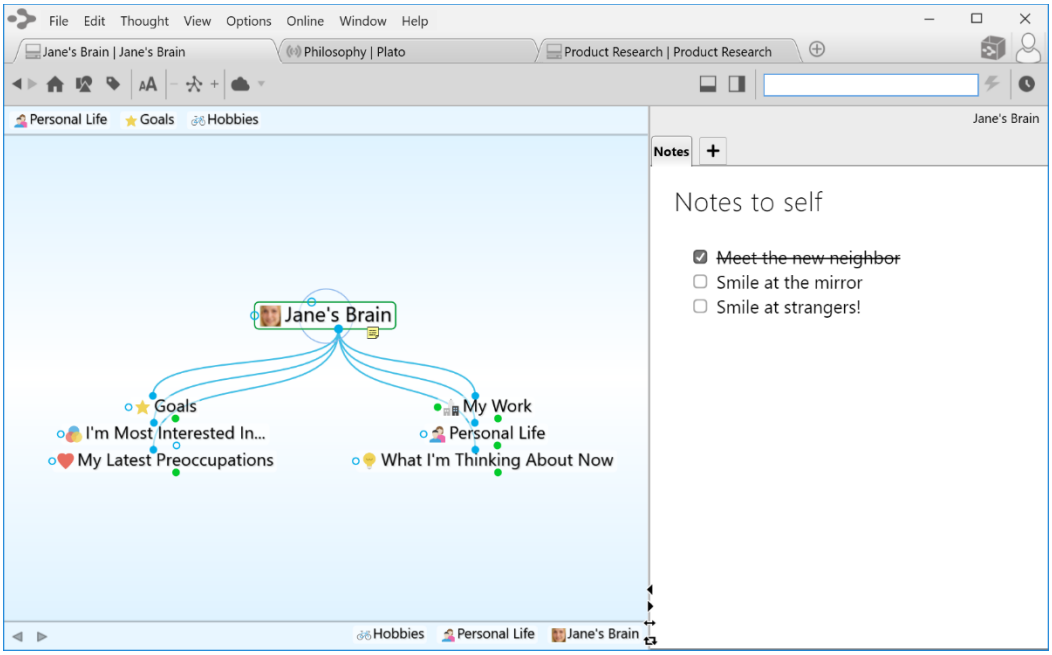



**Figure 1. TheBrain Interface**

## Thoughts are Information

TheBrain Thoughts can represent just about any type of information, including concepts, people, documents, spreadsheets, images, videos, shortcuts, and web pages. By letting you create links and associations between Thoughts, TheBrain expands to become a visual interface that reflects the way you think.

Using simple click-and-drag techniques, you'll be able to create and navigate through networks of Thoughts in a conceptual space unique to your work habits. When you begin using TheBrain, you will find that your computer becomes easier to use—faster, more enjoyable, and less frustrating—helping you use your time more efficiently.

## TheBrain's Dynamic Graphical Interface

TheBrain lets you create a simple, dynamic graphical map in which to input and navigate all your information. Your Brain starts with a single Thought, to which several other Thoughts can be visually linked. These Thoughts have their own links to other Thoughts and, possibly, to each other. TheBrain's flexible structure allows any Thought to be linked to any other Thought, so you are never more than a few steps away from the information you are seeking. It's simple to make connections between Thoughts so that they reflect the connections you make in your mind.

## Cross Platform Accessibility

Brain data is accessible from virtually any device with rich full-featured clients on Windows and macOS plus mobile clients for iOS and Android. Additionally, you can access your Brain via a web browser by logging in at www.thebrain.com. TheBrain's sync service keeps all your data backed up and synchronized over the cloud for seamless access.

This user guide is focused on the Windows and macOS software. Please visit www.thebrain.com for information about the mobile clients.

## About this Guide

The following icons are used throughout this guide to flag categories of information:

This icon is used to identify notes.

This icon is used to flag tips and suggestions.

TheBrain is offered in two editions—Free and Pro. Icons are used throughout the guide to flag features that are specific to the Pro edition. Features that are available in **both** editions are not designated with a special icon.

This icon is used to indicate that the feature is available in the Pro edition only.

Because TheBrain works on Windows and macOS. OS-specific features are flagged with icons throughout the guide. Features that are available for **both** Operating Systems are not designated with a special icon.

This icon is used to indicate that the information applies only to computers running macOS.

This icon is used to indicate that the information applies only to computers running Windows.

In addition:

**Labels** Names of buttons, menus, commands, keys, and icons appear in **this font** throughout the guide in order to stand out.

## Note to macOS Users

**Right-clicking:** Most features in TheBrain can be accessed with just a single click of your primary mouse button. However, there are several context-sensitive shortcuts available in context menus which appear when right-clicking. On a Macintosh, many systems do not have a right mouse button. For trackpad users, click or tap with two fingers. Alternatively, hold down the **Control** key while you click. Note that many mice can be set up to interpret clicks on each side of the main button differently so that **Control**-clicking is not necessary. To enable this, alter the Mouse settings in the System Preferences area of your Mac. Select “Secondary Button” for the right side of the mouse.

**Ctrl** key: Some features are accessed by clicking while holding down the **Ctrl** key on Windows. For macOS, use the **Command** key.

Here is a list of working definitions for the basic terms used throughout TheBrain.

**Brain** A collection of associated Thoughts, each of which can have content. You can create multiple Brains.

**Thought** The topics that you link together in your Brain are called Thoughts and are the basic unit of a Brain. A Thought can represent anything you want it to. It can include an icon, notes, and one or more attachments (such as files and web sites) or it can have no content at all and simply act as a subject heading or organizer. Minimally, a Thought has a name.

**Plex** The visible, graphical portion of your Brain that displays your Thoughts.

**Content Area** The portion of the Brain window that displays content that can be associated with the active Thought or link. Types of content include Notes, attachments (such as worksheets, presentations, documents, videos, and images), links, URLs, and events.

Clicking any Thought or link in the Plex displays its associated content in the Content Area.

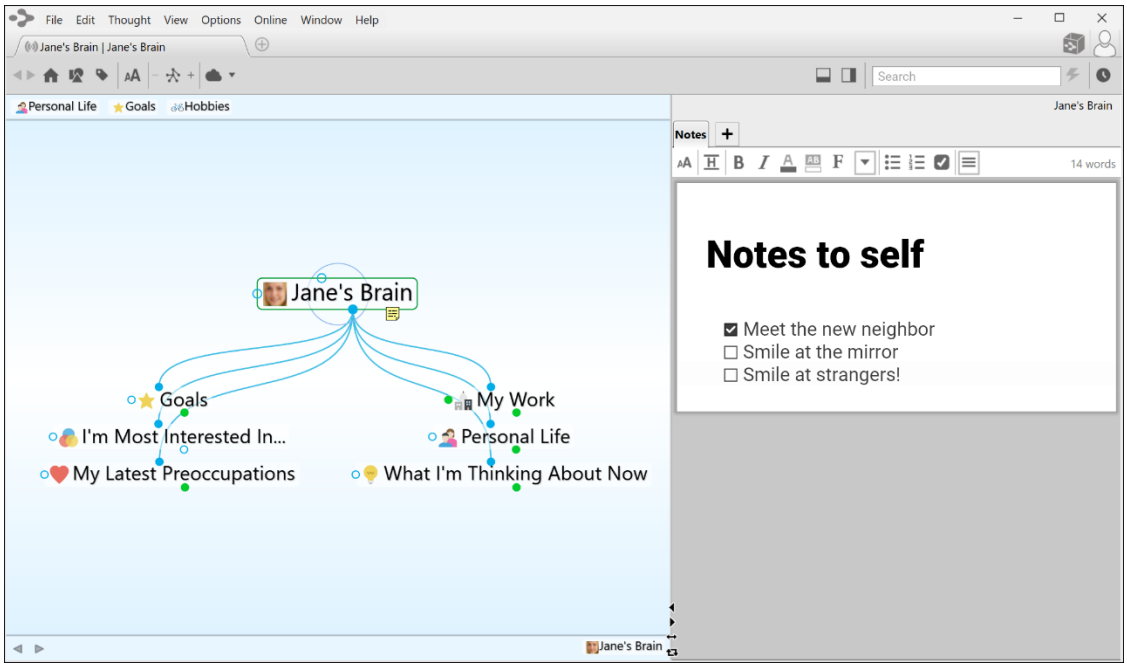



**Figure 2. TheBrain Plex and Content Area**

**Active Thought** The active Thought appears in the center of the Plex and is the current focus. Any items attached to the Thought, like notes, files, links, and events appear in the Content Area.

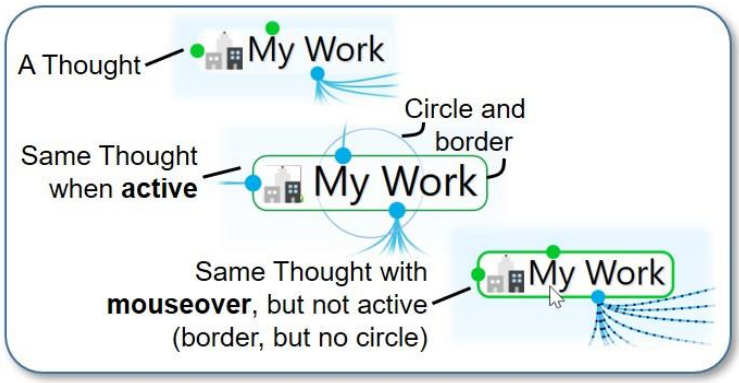



**Figure 3. The Different Ways a Thought Can Appear**

As shown below, when you click a Thought it moves to the center of the Plex and it becomes the active Thought.

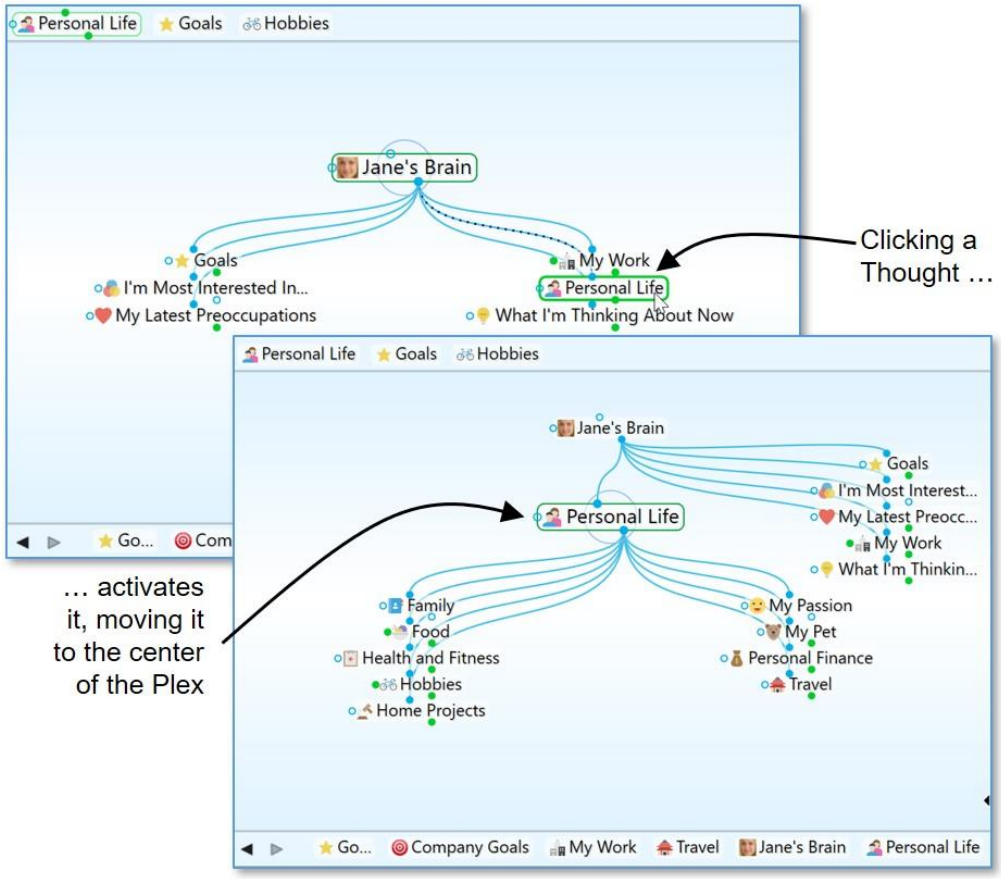



**Figure 4. Activating a Thought**

**Thought Relationships**

A Thought is said to be a “parent Thought,” “child Thought,” “sibling Thought,” or “jump Thought” based on its relationship to other Thoughts with which it is linked.

In your own life, you may be someone’s parent, and someone’s child, and someone’s sibling, and someone’s peer, advisor, or colleague. So, who are *you*? The answer to that question is relative—it depends on the circumstances and what hat you’re wearing at the moment.

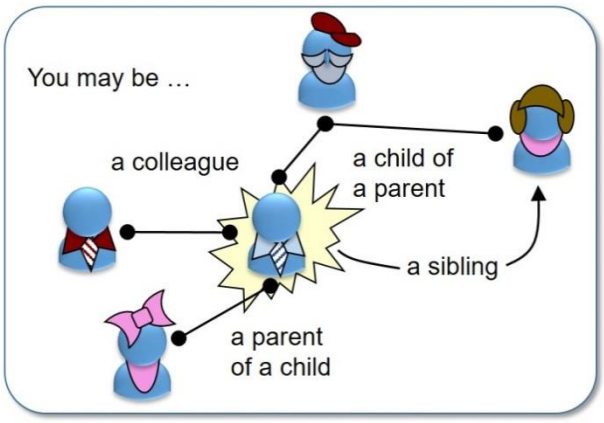



**Figure 5. Relationships are Relative to *You***

The same applies to Thoughts. The relationships between Thoughts are displayed automatically, based on which Thought is active at the moment.

Whether a Thought is a parent, child, or sibling depends on its current relationship to the active Thought.

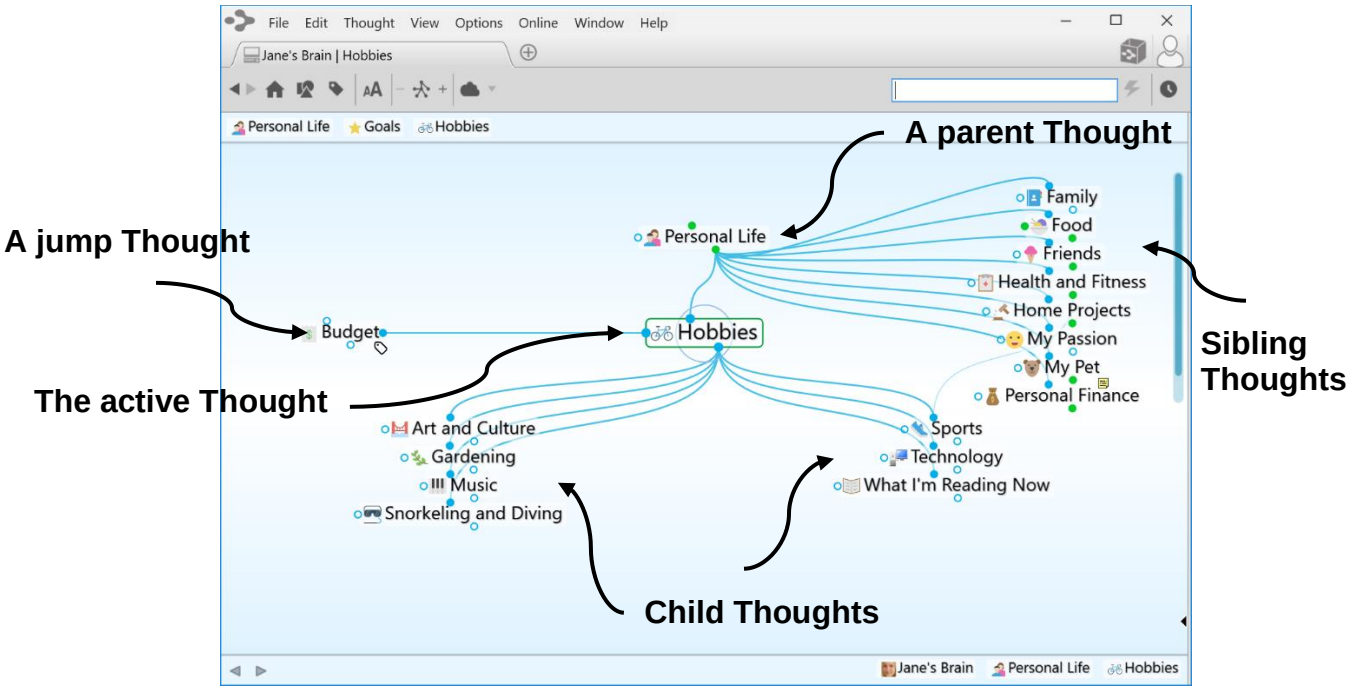



**Figure 6. Thought Relationships are Relative to the Active Thought**

| | |
|---|---|
| **Child Thought** | Child Thoughts are subtopics of the active Thought. They appear in the "child zone," below the active Thought. In the picture above, the active Thought "Hobbies" has seven child Thoughts. |
| **Parent Thought** | Parent Thoughts represent super ordinate topics of the active Thought. They appear in the parent zone, above the active Thought. |
| **Sibling Thought** | Sibling Thoughts share a parent with the active Thought. They appear in the sibling zone, to the right of the active Thought. In the picture above, "Family," "Food," "Health and Fitness," "Home Projects," "My Passion," "My Pet," and "Personal Finance" are siblings of "Hobbies" because they are all children of "Personal Life." |
| **Jump Thought** | Jump Thoughts are related to the active Thought but are neither child nor parent topics. They appear in the jump zone to the left of the active Thought. Jump Thoughts have an "equal weight" relationship with the Thought to which they are related. For example, as shown above, "Hobbies" has the various hobbies "Art and Culture," "Gardening," "Music," "Snorkeling and Diving," "Sports," "Technology," and "What I'm Reading Now" linked as child Thoughts since they are types of hobbies. "Budget" affects the amount of resources available to spend on the various hobbies and so it is closely related, but it is not a hobby itself. Therefore, it makes a perfect jump Thought—related, but not part of the main Thought grouping. |
| **Gate** | Thoughts in the Plex have three circular "gates," each of which is used to link a specific type of relation: The parent gate is above a Thought, the child gate is below it, and the jump gate is to the left or right of it. A gate is hollow when there are no links attached to it and solid when one or more links are attached. Solid gates in a contrasting color have links to Thoughts that are not currently showing in the Plex. The color of gates is based on the current color scheme. When you point at a gate, a highlighting circle appears around it. |
| **Link** | A link is the line that connects two Thoughts. When used as a verb, to "link" is the act of connecting Thoughts to establish close relationships. Links can also show direction to help you visualize relationships. |

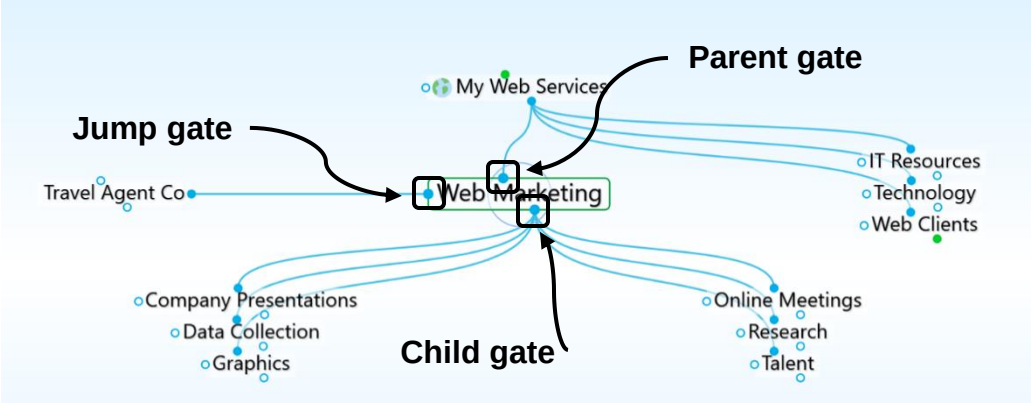



**Figure 7. Thought Gates**

## Installing TheBrain and Creating an Account

The first time you download and install TheBrain, you'll be prompted to log in or create an account if you don't already have one. The log-in window provides the ability to create a new account or log in to an existing account.

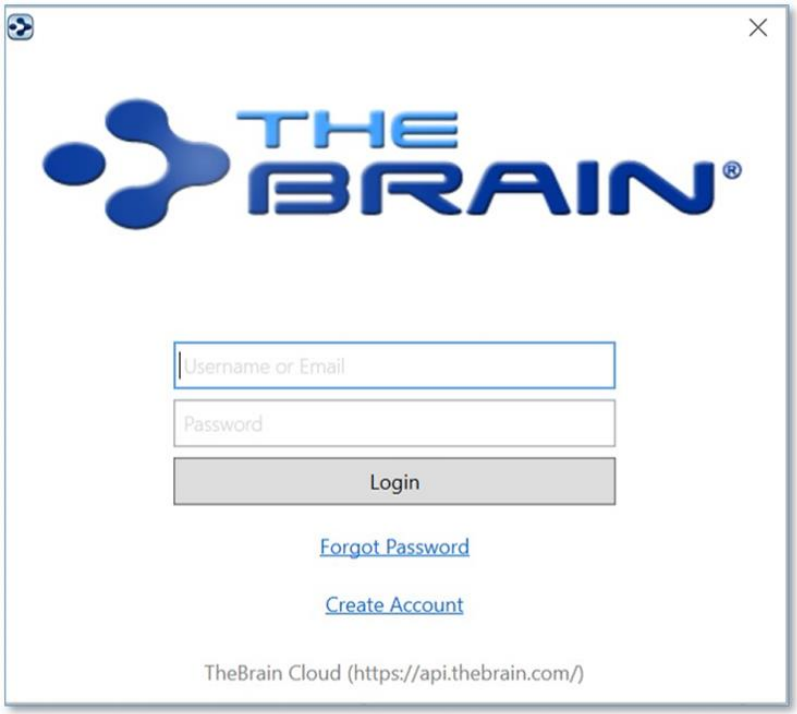



**Figure 8. TheBrain Log-in Window**

Here are the fields to complete if you're creating a new account:

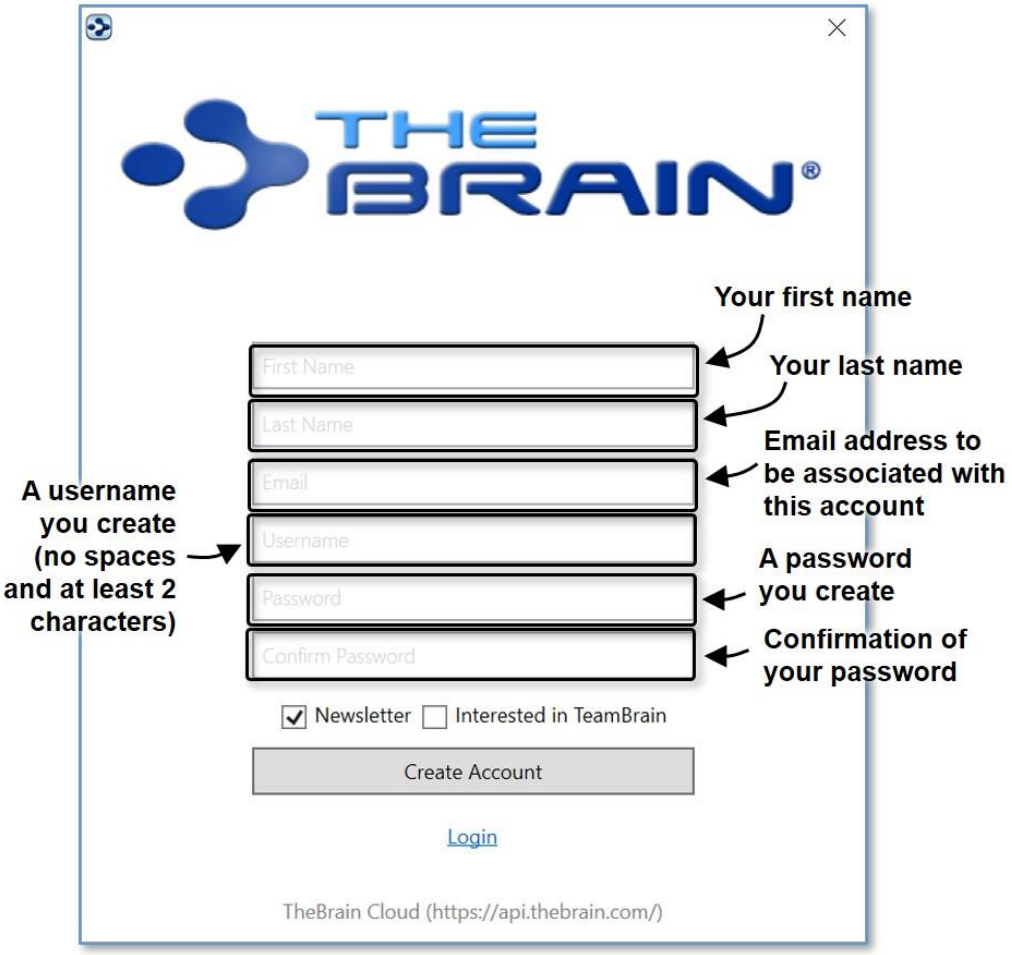



**Figure 9. Creating a New Account**

After you click the **Create Account** button, TheBrain will send an email to the address you specified.

Check for a message from no-reply@thebrain.com. Make sure to check your spam folder if you don't receive the message promptly.

When you open the message you will see a green **Activate Brain Account** link. After you click the link, you'll see a notice confirming your success.

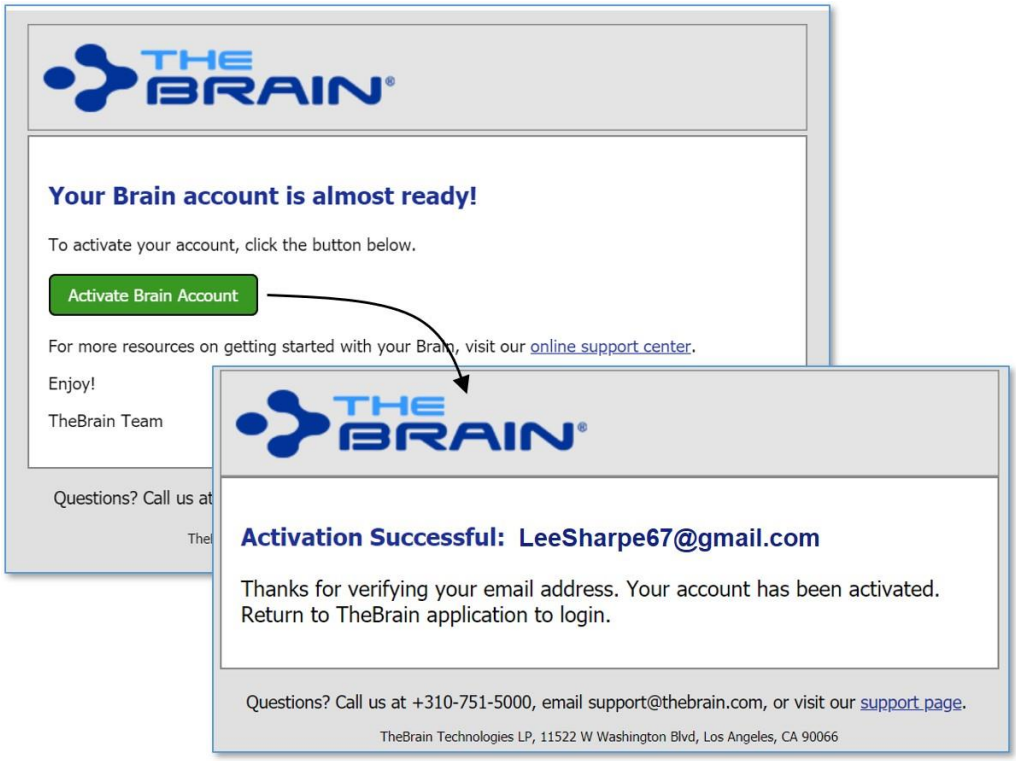



**Figure 10. Activating a New Account**

Now you can return to TheBrain and log in.

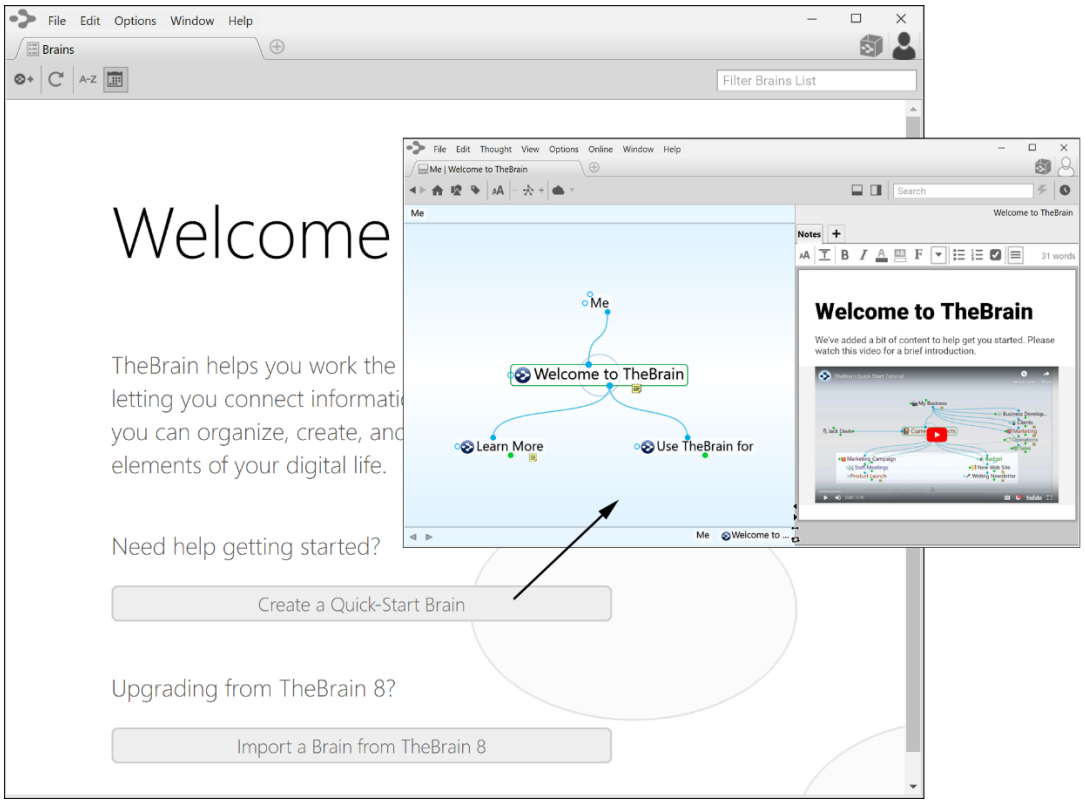



**Figure 11. Welcome to TheBrain**

Click “Create a Quick-Start Brain” and follow the directions on the screen to enter a personalized name for this Brain. The Quick-Start Brain is actually a dynamic resource for learning more about using your Brains and you’ll find a wealth of useful information in it. Click any of the links to see what is displayed.

You can always create a new Quick-Start Brain by selecting the **Create a Quick-Start Brain** command on TheBrain **Help** menu.

## Opening Older Brains

When you’re looking at old and new Brain files, note that Brains created in TheBrain 7 or 8 have filename extensions of **.brain**. Brains created in some earlier versions have a **.brn** filename extension.

To open a **.brn** file that you created in a version **older** than TheBrain 8, first open it using TheBrain 8 and then import the resulting Brain in TheBrain 11, as described in the steps below.

To open a Brain that you created in TheBrain 8:

1. Open TheBrain.

2. Click the **File** menu, then click the **Import** command.

All dialogs can also be navigated via the tab key.

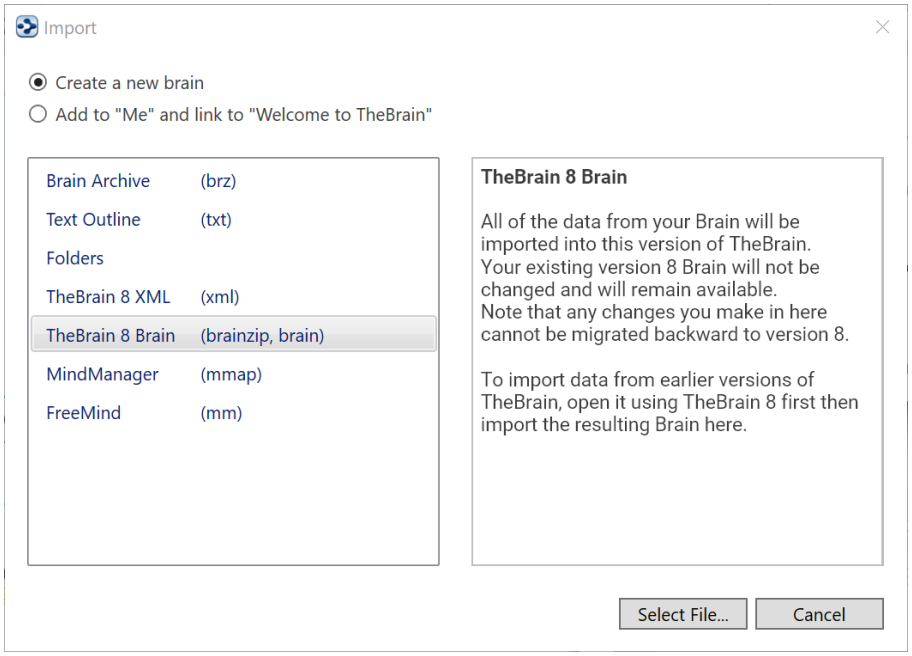



**Figure 12. Import Box for Opening an Older Brain**

3. Click the **Select File** button, navigate to the Brain of your choice, then click the **Open** button when the file is selected. You will see a running progress report.

4. When TheBrain has finished converting, you will see a “Conversion complete” message as shown below. Click the **Import** button.

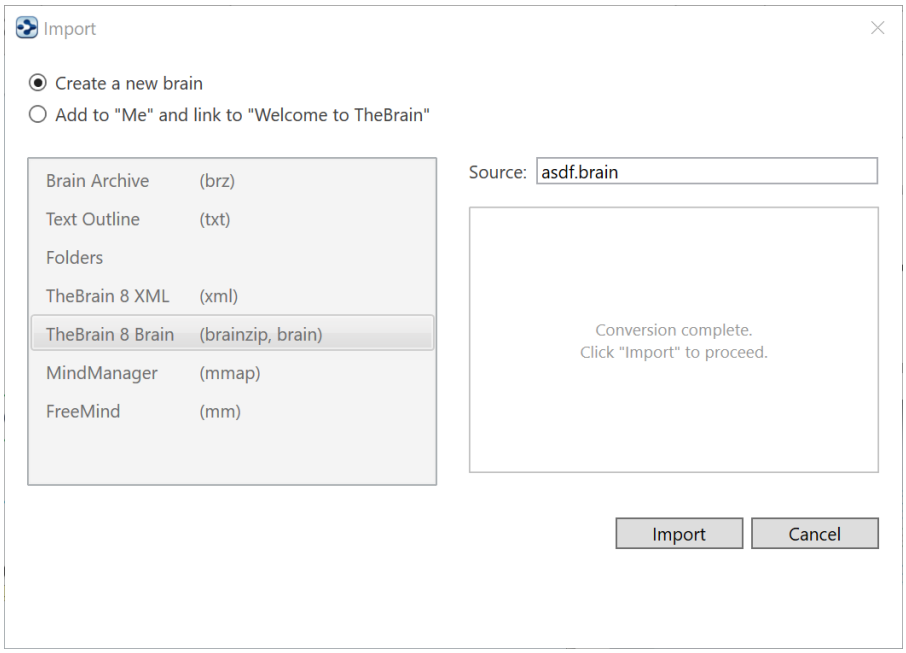



**Figure 13. Import Conversion Progress**

5. When TheBrain has finished importing, you will see the following dialog box. Click the **Open** button to open the Brain you just imported in a new tab of TheBrain window.

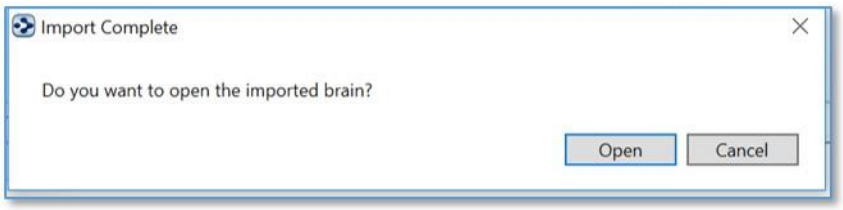



**Figure 14. Open the Imported Brain in a New Tab**

## Suggestions for Transitioning to Your New Brain

Here are some tips for establishing a happy relationship with your Brain:

Begin by taking yourself on the guided tour provided in the next section of this guide. As you exit the tour, you'll already have hands-on skills for getting your Brain up and running quickly and easily. You may also want to attend one of TheBrain's free online seminars on getting started—TheBrain 101. To learn more about TheBrain 101, go to http://www.thebrain.com/101.

Avoid "converting" to a Brain-only environment all at once. Make the transition on a file-by-file basis so that every piece of information your Brain contains will be useful.

Build your Brain as you go—associating Thoughts as they occur naturally.

Avoid the temptation to move large folders into your Brain. TheBrain can handle this, but your Brain will be cluttered with Thoughts you may not need.

Remember that your first Brain doesn't need to be your *only* Brain or your *last* Brain. Experiment! Create a Brain just for fun, to try out the possibilities—give yourself room to stretch and explore. Your Brain is waiting!

# A Guided Tour of TheBrain

The best way to build your comfort level with your Brain is to build one yourself—with your very own hands. This guided tour will walk you through the basics, pointing out items of interest along the way. There's no need to take notes and you'll never get left behind, because you'll be going at the most strategic pace—your own.

During this tour, you'll be asked to enter specific information to make it easier to refer to items and areas as the tour proceeds. Naturally, when you're on your own, you'll use your own ideas to create Brains that reflect your thinking.

Here are the sign posts you'll see along the way:

Enter here—the startup action for this phase of your guided tour

Point of interest—take out your virtual camera

Tip—where you can find more details about this step of your guided tour

Take five—this is a good place to take a break if you want one

Exit here—this marks the end of your guided tour

*Let's go!*

## Part 1: Start Up and Explore the Brain Window

**Itinerary:** You'll start up TheBrain, create a new Brain, and tour through the components of the Brain window.

Start up TheBrain, unless it's already running. You can select TheBrain from the Start menu or the desktop icon. On macOS, TheBrain app can be found in the Applications directory.

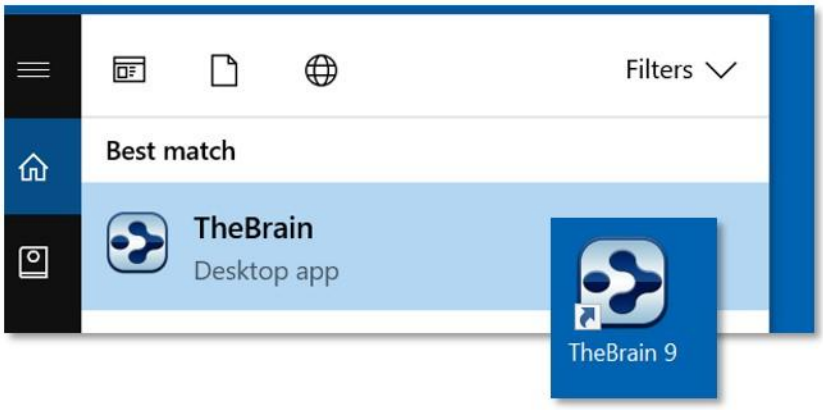



**Figure 15. Starting TheBrain**

Log in to your Brain account. This enables integration with any subscriptions you may have.

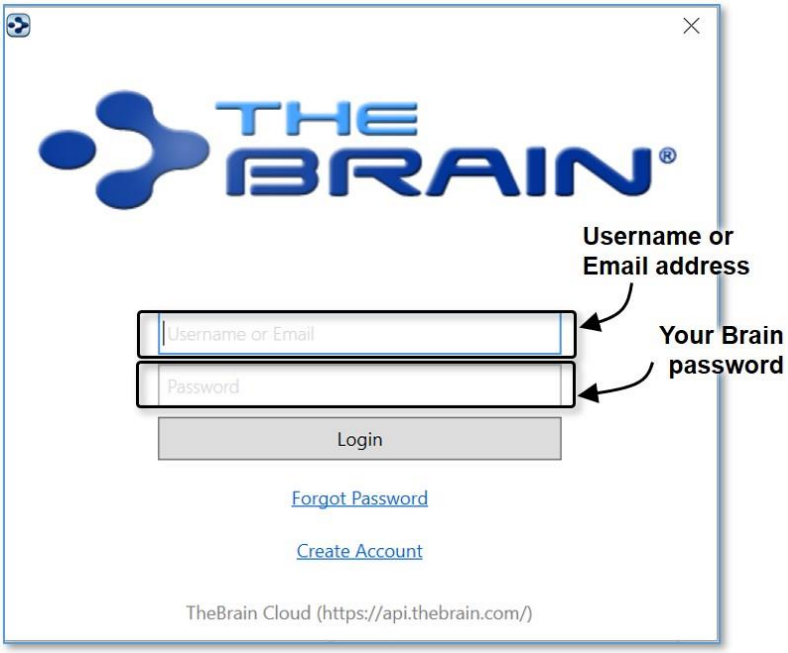



**Figure 16. Logging In to TheBrain**

1. Click the **File** menu in the menu bar at the top of the window on the welcome screen (or click the **File** menu, then click the **New Brain** command).

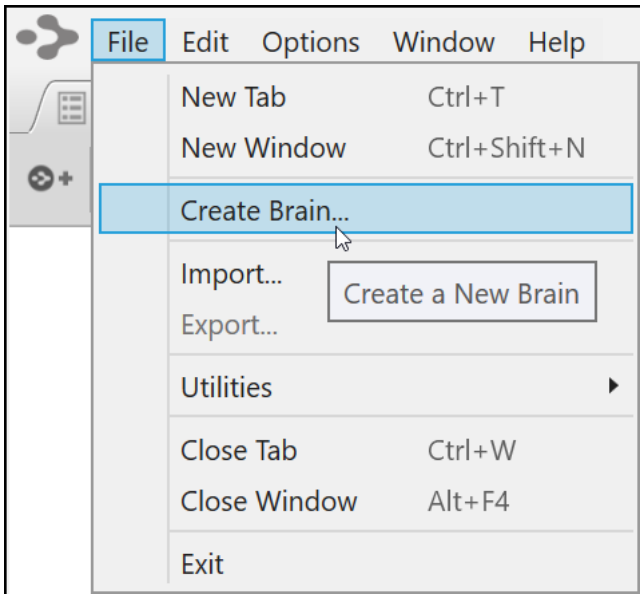



**Figure 17. Create Brain Command**

2. In the empty field, type: Tour

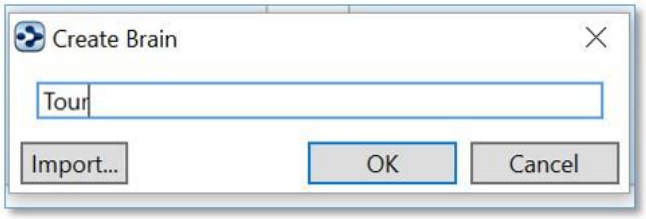



**Figure 18. Create Brain Dialog**

3. Press the **Enter** key or click the **OK** button to finish creating your new Brain. It will appear in a new tab named “Tour.” Your screen should look similar to the one below. Note that you can minimize, maximize, or restore TheBrain window using standard Windows’ techniques.

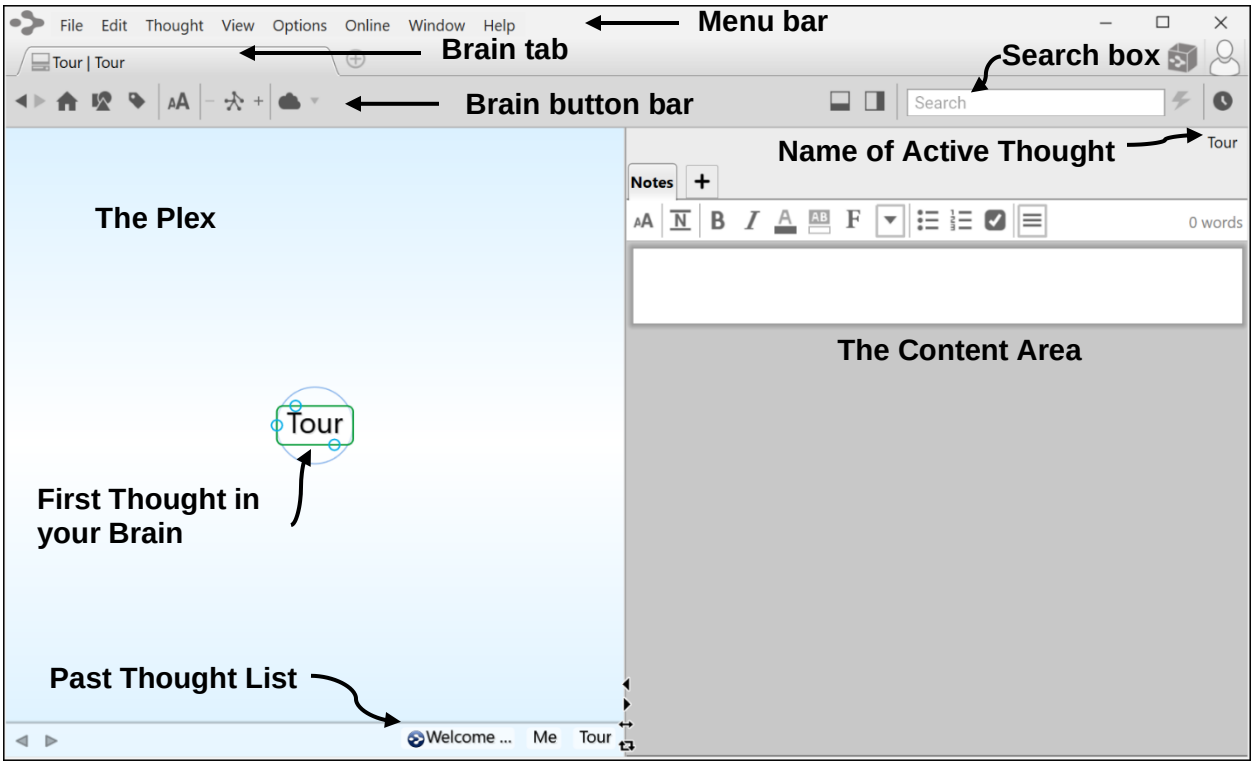



**Figure 19. New Brain in the Plex**

TheBrain creates your first Thought for you. It has the same name as your Brain (which you can change later if you want to). Since it's the only Thought, it's also the "active Thought"—the Thought that's currently selected.

4. Take a few minutes to click some of the Brain Themes to see how the background of the Plex changes. Then click the Theme named "- Light Blue Default" to select it. Click the "**X**" or press the **Esc** key to close the **Brain Theme** box.

You can always return to the **Brain Themes** box by right-clicking within any blank area of the Plex and selecting **Brain Theme**.

### The Brain Toolbar

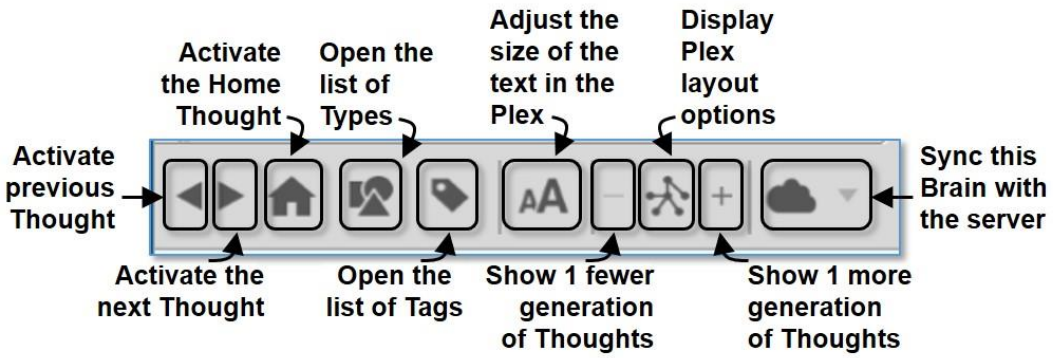



**Figure 20. TheBrain Toolbar**

1. Point at each one of the buttons in the Brain toolbar so that you see a brief explanation in the pop-up tool tip.

Note that since your Brain has only a single Thought so far, some of the toolbar options are currently disabled.

### The Brain's Content Area

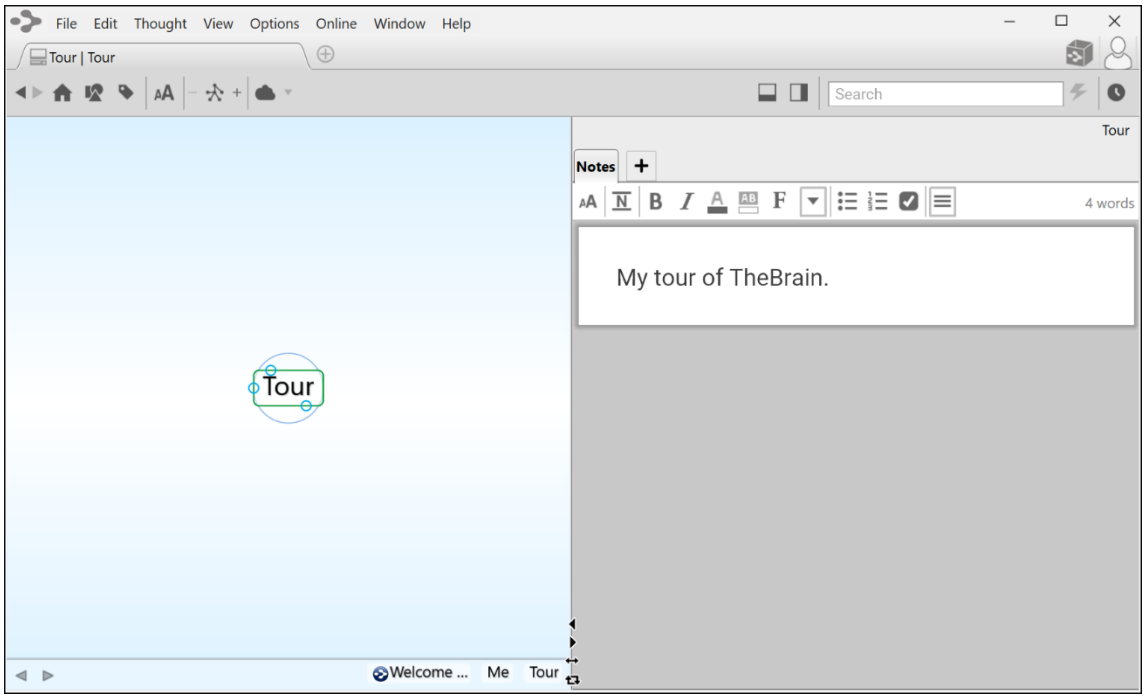



**Figure 21. A Note in the Content Area**

1. Click in the empty white space of Content Area, then type: **My tour of TheBrain**. You've just created your first Note, which is associated with the "active Thought"—Tour.

Notes are saved automatically and always stay associated with the active Thought, even when you activate other Thoughts or close your Brain.

2. Experiment with any of the buttons in the **Notes** tab toolbar if you want a quick peek at some of the functionality.

**Tip:** See the section beginning on page 152 for details about working with the Content Area.

## Part 2: Create New Thoughts

**Itinerary:** You'll create a single Thought, multiple Thoughts, a Thought from an existing file, and a Thought "pin," and modify the relationship between two Thoughts.

Your Tour Brain should be on the screen, as you left it in Part 1.

1. The three small circles in the border around the Tour Thought are called "gates." The bottom circle is called the child gate because it provides a gateway towards creating a child Thought. Drag the mouse from the child gate down a short distance, then release the mouse button. The **Create Child** dialog will open.

**Tip:** If you prefer not to drag the mouse to create a Thought, right-click the Tour Thought and then click the **Create Child** command on the context menu.

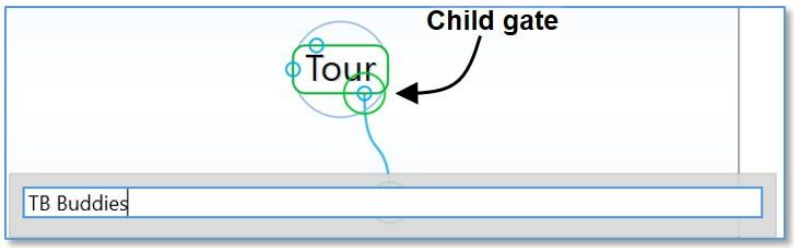



**Figure 22. Dragging from the Child Gate**

The context menu for the active Thought can also be accessed by clicking on the Menu key on a Windows keyboard.

2. In the empty field, type: **TB Buddies**

   This Thought will organize Thoughts about people you're going to talk to about how they use TheBrain, so you can share experiences.

3. Press the **Enter** key. A larger circle appears around a new Thought for a few seconds, highlighting it for easy visibility. Your Tour Thought now has a child Thought named "TB Buddies" (short for "TheBrain Buddies").

### Creating Multiple Thoughts at Once

You can create more than one Thought at a time by typing a semicolon to separate each Thought.

1. Create four new child Thoughts for Tour, all at the same time. To begin, drag Tour's child gate down a bit, then release the mouse button.

2. In the empty field, type: **Tips; Reminders; To-Do; New Brain Ideas**

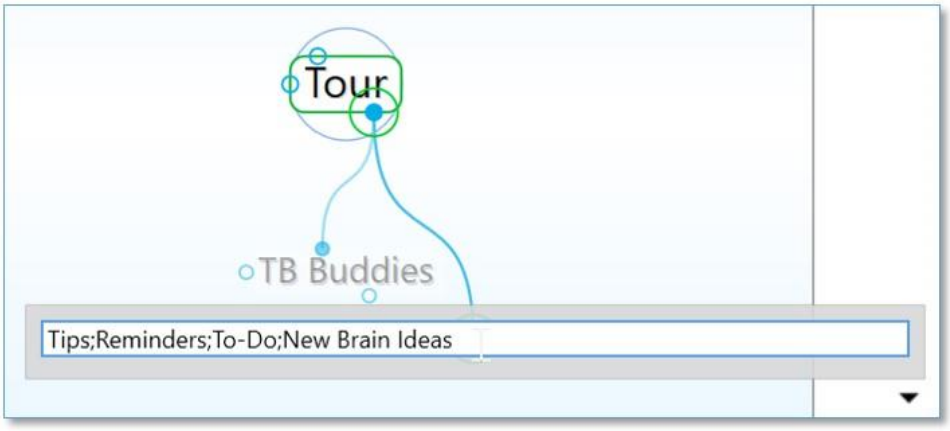



**Figure 23. Create Multiple Thoughts at Once**

**Tip:** The semicolon (;) between each Thought name tells TheBrain that these are separate Thoughts. Typing a space after each semi-colon is optional.

3. Press the **Enter** key.

Note that the new Thoughts are arranged in alphabetical order. To change the order of Thoughts, right click in the background and select **Arrange Thoughts by…** From here, you can arrange thoughts by Name, Type, and Date Modified, Created or Activated in Latest or Oldest orders. Thought sorting disregards articles such as A, An and The.

### Create a Thought by Dragging and Dropping an Existing File

You can create a Thought by dragging a file from the desktop or from your file manager (such as File Explorer on Windows or Finder on a Mac). The new Thought will have the same name as the file (minus its extension) and it will automatically have the file as an attachment. It will become a child of the active Thought. You'll learn more about attachments in the next part of this tour.

1. Choose any file, from your desktop or from any other location. Your original file will not be affected—by default, drag and drop creates a copy of the file.

2. Size the TheBrain window so that you can also see either the portion of the desktop containing the file you're going to use or the window in which the file is listed.

3. Drag the file into the Plex.

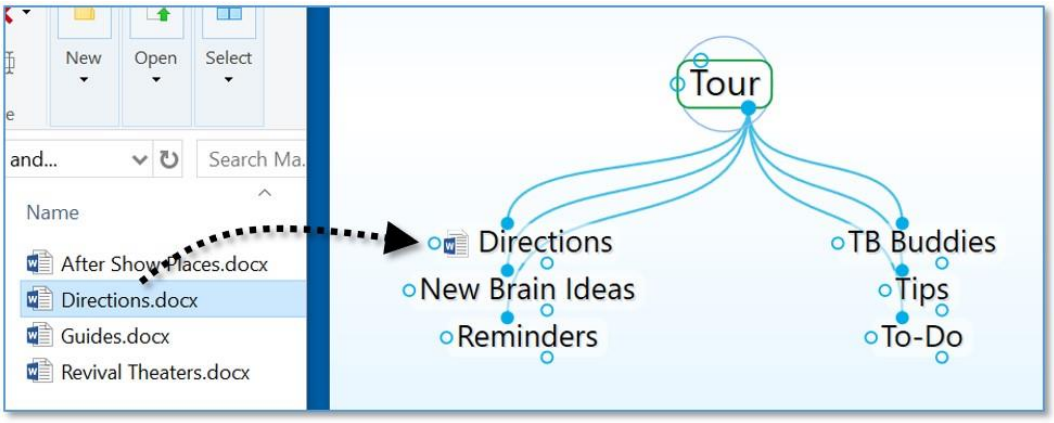



**Figure 24. File Dragged into Plex Becomes a Child Thought**

The new Thought will appear in the Plex and it will include an icon that represents the type of file. Any time you click this icon in the Plex, the related file will open.

## Thought Pins

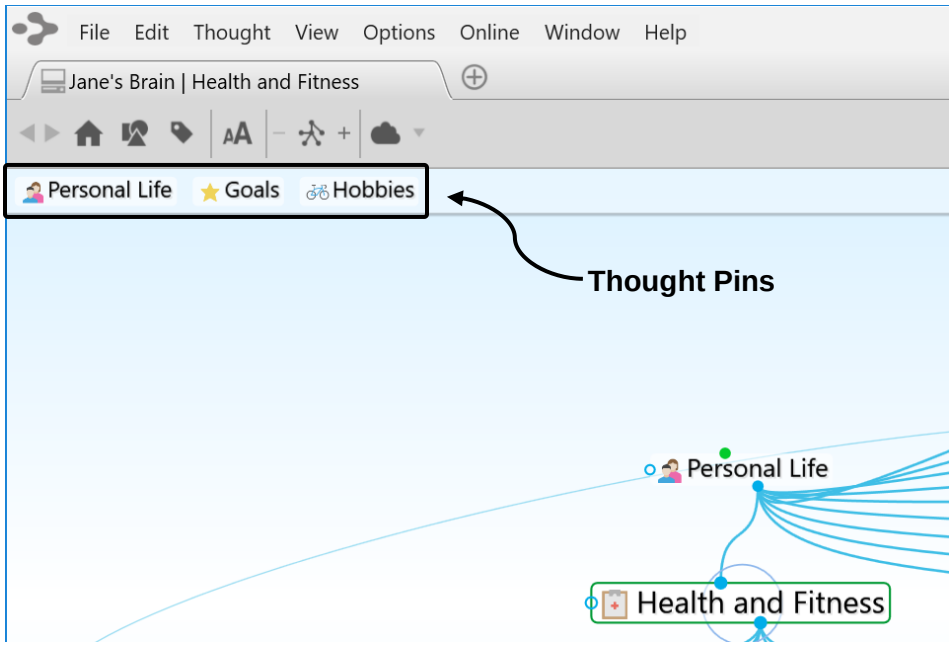



**Figure 25. Thought Pins in an Existing Brain**

The area at the top of the Plex, just below the Brain toolbar functions like a bulletin board on which you can "pin" Thoughts you want to keep at your fingertips. These quick-access shortcuts to Thoughts are called "pins." No matter where you are in the Plex, the pins remain visible.

1. Right-click the Thought named "Reminders," then click **Create Pin** on the context menu.

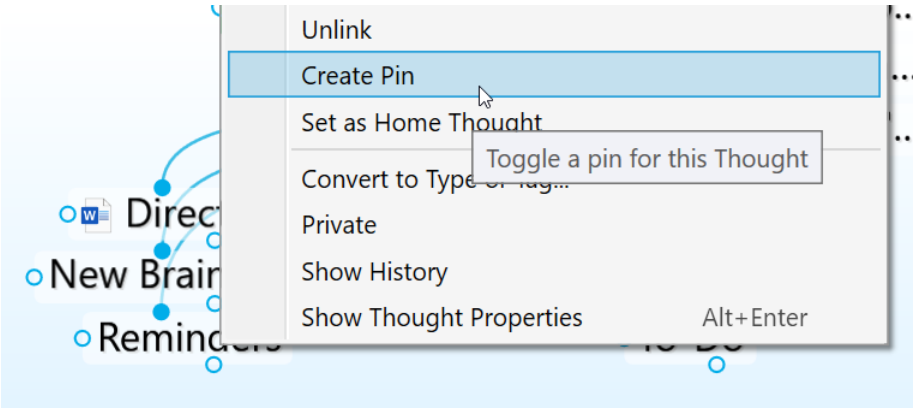



**Figure 26. Create a New Pin**

2. Click any other Thought in the Plex. When you want to return to the Reminders Thought, click the Reminders pin to get there instantly.

### Relationship Changes

1. Create a new child of Tour named “Experiments.” (Drag from Tour’s child gate down a bit, type: **Experiments** and then press the **Enter** key.)

2. Now you’ve decided that the Experiments Thought should really have an equal relationship with Tour, and not be one of its children—because you’ll use experimenting as much as touring to develop your Brain skills.

   Drag Experiments up to the left side of the Plex so that it is level with Tour, then release the mouse button.

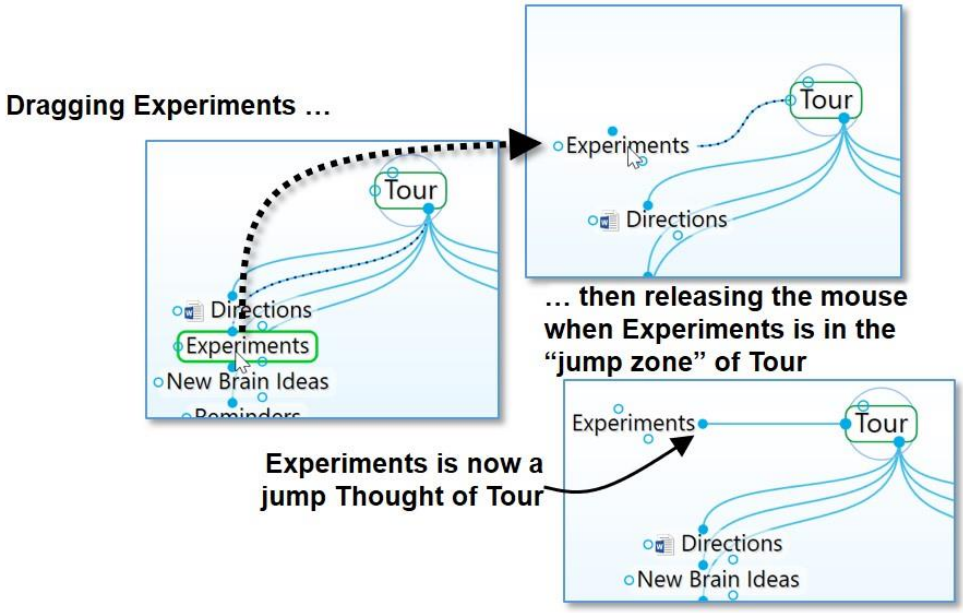



**Figure 27. Dragging a Thought to Change its Relationship**

**Tip:** See the section beginning on page 93 for details about changing Thought relationships.

This is a good place for a break if you’d like to take one. You can leave your Brain open or close the Brain window. Just start up TheBrain again when you’re ready to continue.

## Part 3: Find, Add Attachments, Link, and Delete Thoughts

**Itinerary:** You’ll find Thoughts, add an attachment to a Thought, add a web page to a Thought, use a Thought to open an application, link some Thoughts, and delete a Thought.

Your Tour Brain should be on the screen, as you left it in Part 2. You'll begin by creating a few more Thoughts for a little more scenery along the way.

1. Create four new child Thoughts under TB Buddies: **John**; **Jill**; **Fred**; **Ann** (Drag from TB Buddies' child gate, then type each name, separated by a semicolon, then press the **Enter** key.)

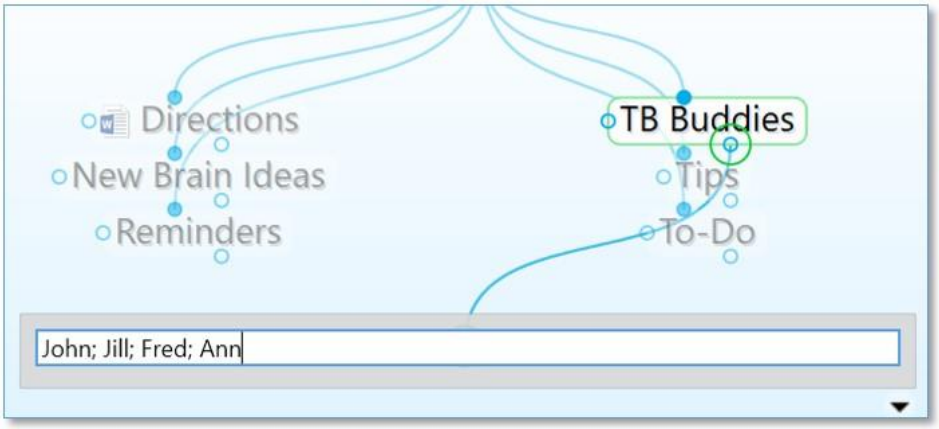



**Figure 28. Four New Thoughts**

2. Click TB Buddies to make it the active Thought. It should be in the middle of the Plex.
3. Enter a Note for TB Buddies: **We should compare Brains sometime**
4. Point the mouse at the Tour Thought and notice how the Note you just entered for TB Buddies is still in the Content Area.
5. Click the Reminders pin at the top of the Plex to go quickly to your Reminders Thought. Notice that the Content Area is blank, since you haven't created content for that Thought yet.

### Instant Activation

"Instant Activation" is a Brain feature that lets you quickly find a Thought by typing a few letters, and choosing from a list of "hits." After you click the Thought of your choice, that Thought is automatically activated.

Say you're ready to work with Fred's Thought—you want to add an attachment to it. With such a small Brain, you could click around and find it pretty quickly, or you could speed things up:

1. Click in the Search field in the top-right area of the window and type: **f**

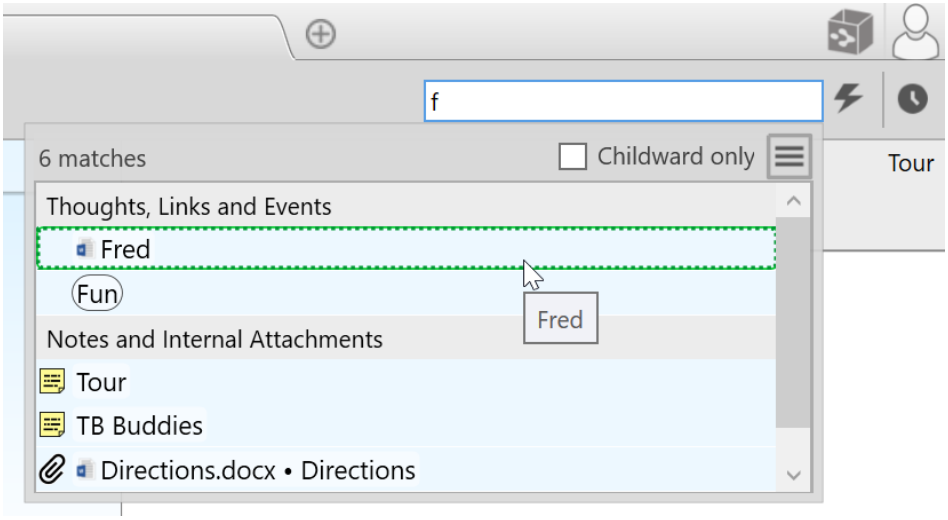



**Figure 29. Instant Activation**

Because you only have one Thought that begins with the letter “f,” it is found instantly. If other Thoughts begin with the same letter you will see them in the box. The more characters you type, the more finely-tuned your search will become.

2. Click on “Fred” in the Search field below Thoughts, Links, and Events. Fred will be activated.

3. Type the letter “j” in the Search field to activate Jill. Notice that the two Thoughts beginning with the letter “j” appear in the list. Activate Jill.

**Tip:** See the Searching Your Brain section beginning on page 48 for details about more complex searching and the Navigating Your Brain section on page 39 for more on cruising around your Brain.

### Attachments

1. Back to Fred. Activate Fred by clicking his Thought in the Plex.

2. Click the **Add Attachment** button, which displays as a **+** sign, next to the **Notes** tab in the Content Area. As you see below, you can add many kinds of attachments.

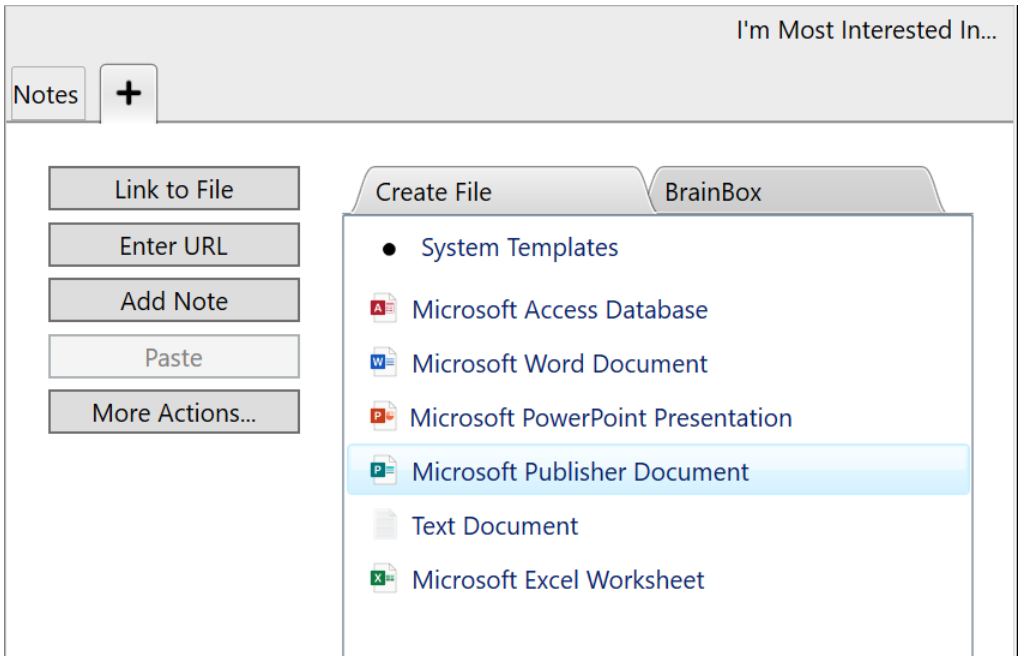



**Figure 30. Add an Attachment**

3. You can add an existing file or you can create a new one. For now, select an existing file on your computer. To do so, click the **Link to File** button.

4. Navigate to any file on your computer, then click the **Open** button to attach it to the active Thought. As soon as the file is attached you will see a **Preview** button so you can look at the file right away if you want to. Or you can double-click the file's icon in the Content Area.

5. With Fred still active, click on the **Notes** tab and notice that the name of the file you attached now appears as a new tab in the Content Area. Now you can click on it whenever Fred is active to access and open the file. You might use this function to add a file you're collaborating on, or a worksheet with data for a project you're completing together.

### Web Page Thoughts

1. Activate the John Thought.

2. Open your Internet browser and navigate to a web page of your choice.

3. Arrange the browser window and the Brain window so that you can see at least part of both of them.

4. Drag from the address bar icon in your browser to an empty area of the Plex, then release the mouse button.

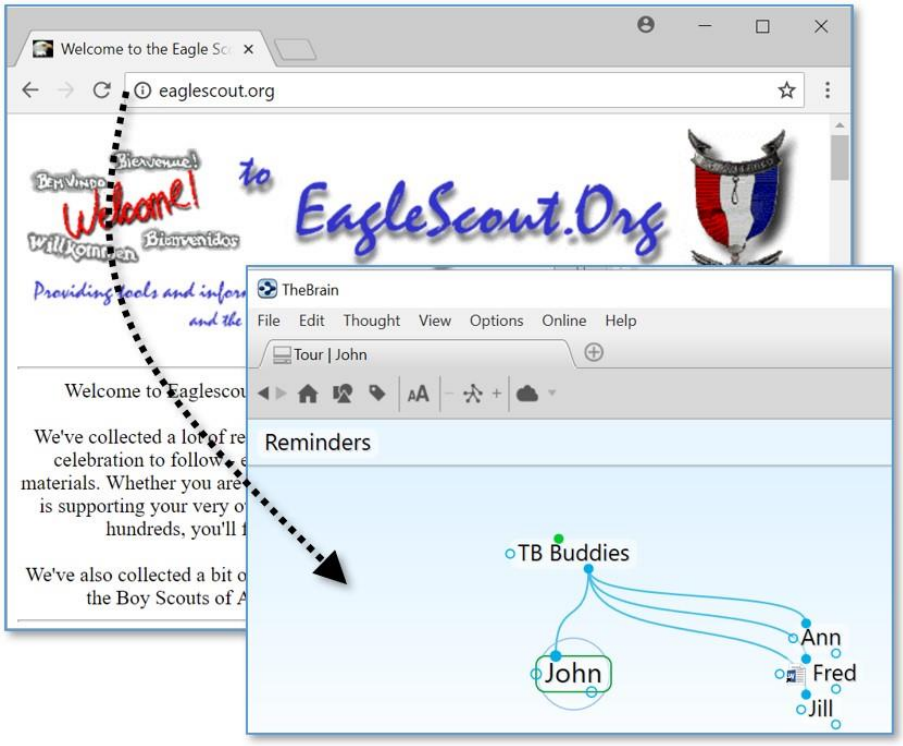



**Figure 31. Inserting a Web Page as an Attachment**

The web page will be added as a child Thought of John. When you click the Thought the web page will launch in TheBrain's built-in browser in the Content Area.

**Tip:** If you want to add the web page to a Thought instead of creating a new child Thought, drop the web page on top of the Thought. See the Adding Attachments to Your Thoughts section beginning on page 174 for details about attachments.

### Creating Attachments from a Thought

1. Activate the New Brain Ideas Thought by typing an "n" in the Search field and then clicking on "New Brain Ideas" in the list.

2. Click the **Add Attachment** button in the Content Area.

3. Click **Microsoft Office Word Document** in the **Create File** tab (assuming this application is installed on your computer—if not, select any other application in the list). The new document will be named "New Brain Ideas," matching the active Thought.

TheBrain automatically detects file types for many applications that you may have installed on your computer and populates the list of available files to create. You can also add templates for any file that you'd like to use as a basis for new files yourself.

- Click the **More Actions…** button and select **Template Help** to open the folder where templates are stored, then copy empty files of the types you want to be able to create from within TheBrain into the folder.
- When you are done, click the **Add Attachment** button again and chose one of the templates you added. **User Templates** will appear in a list directly above all **System Templates**.

Once you select a file type, two things will happen:

- First, a new file will be created and added to the Thought (in this example, a Microsoft Word document named "New Brain Ideas").
- Second, the file will be automatically opened so that you can work on it (in this case, starting Microsoft Word).

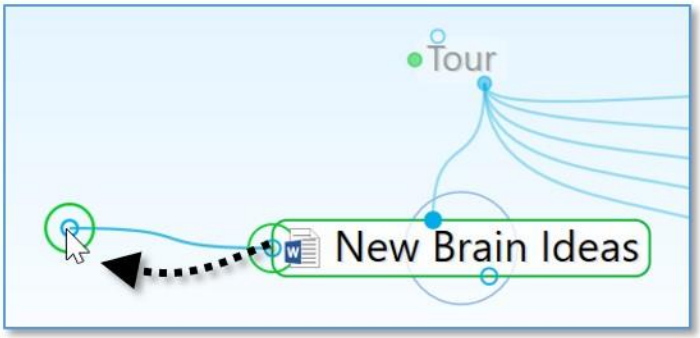
After you add content to the document and save it, it will be saved internally within your Brain. When you click on the Thought, the document will open again.

4. Close the new document before moving on to the next section.

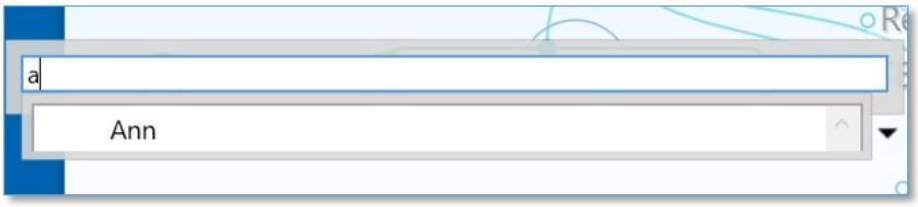
### Linking Thoughts

One of the most powerful features of TheBrain is the ability to connect Thoughts to each other. Remember, you can connect any Thought to any other Thought. For example, say one of your TB Buddies, Ann, is full of ideas on how to use your Brain. You might want to link her to the New Brain Ideas Thought.

1. Activate the New Brain Ideas Thought (if it isn't still active).
2. Drag from the jump gate on the left side of New Brain Ideas as if you are going to create a new jump Thought and release the mouse button.



3. Type the first few letters of the Thought you want to connect (Ann) in the **Create Jump** dialog box. Notice that the existing Thought is displayed in the list below.




4. Either double-click on Ann in the list of found entries or click Ann once then press the **Enter** key.

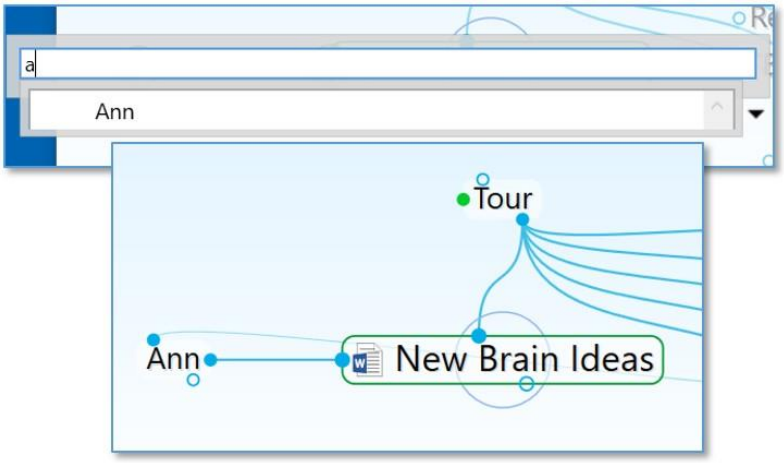



**Figure 32. Jump Thought Linked to an Existing Thought**

Now that Ann is connected to New Brain Ideas, whenever you look at this Thought, her Thought will be just a click away. Also, when you are at Ann's Thought, the New Brain Ideas Thought will be conveniently available.

There are many ways to link existing Thoughts. The method above is convenient when the Thoughts you want to connect are not both visible, however if the Thoughts are both visible, you can simply draw the link between the two, starting from either one of the Thoughts' gates. Both the Past Thought List below the Plex and the pins can be used for linking Thoughts visually. When you connect two Thoughts visually, the resulting relationship will be determined by which gate you selected to start the linking—it does not matter where you release the mouse button over the destination Thought.

### Forgetting and Deleting Thoughts

If you've entered a Thought in error or you simply don't need to keep it around anymore, you can easily remove it from your Brain. TheBrain offers two ways to

remove Thoughts—forgetting and deleting. When a Thought is forgotten, it can be remembered later if need be, however, deleting is permanent.

Let's forget the Thought Jill.

1. Make TB Buddies the active Thought.
2. Right-click the Jill Thought.
3. Click the **Forget "Jill"** command on the context menu.

Jill disappears from the display. Now, if you want to show Jill again, turn on Forgotten Thoughts:

- Click the **Options** menu, then click **Show Forgotten Thoughts**.

Any forgotten Thoughts will appear faded.

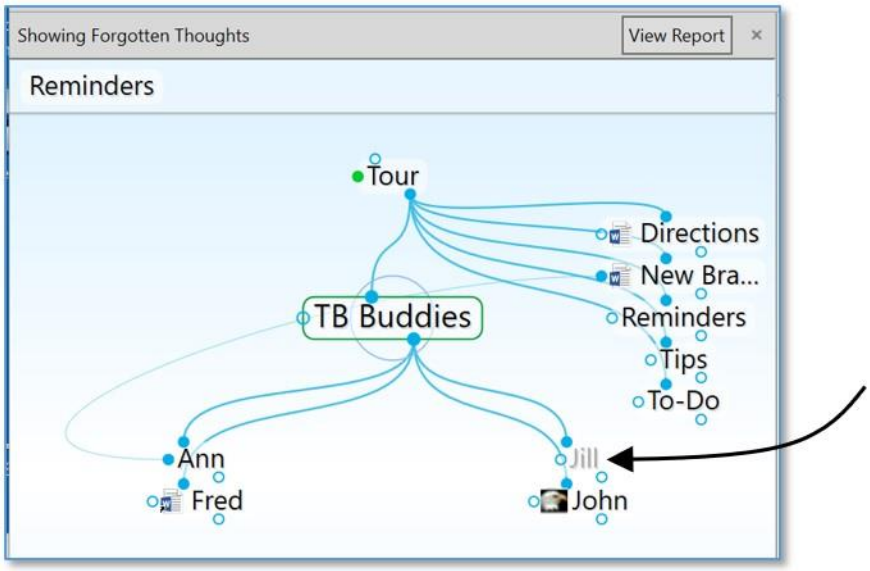



**Figure 33. Forgotten Thoughts**

A message above the Plex reminds you that forgotten Thoughts are showing. You can permanently delete Thoughts or remember them individually or all at the same time, which is explained in the Forgetting and Deleting Thoughts section on page 101. To turn off the display of forgotten Thoughts, simply click the **X** button next to **View Report** or click the **Show Forgotten Thoughts** command in the **Options** menu to toggle it off.

**Tip:** If you want to permanently delete a Thought without first forgetting it, hold down the **Shift** key (for Windows)/Alt key (for Mac) as you right-click on it and then select the **Delete** command.

### Concluding Your Tour

If you click the **Home** button in the Brain toolbar, your Brain should look something like this:

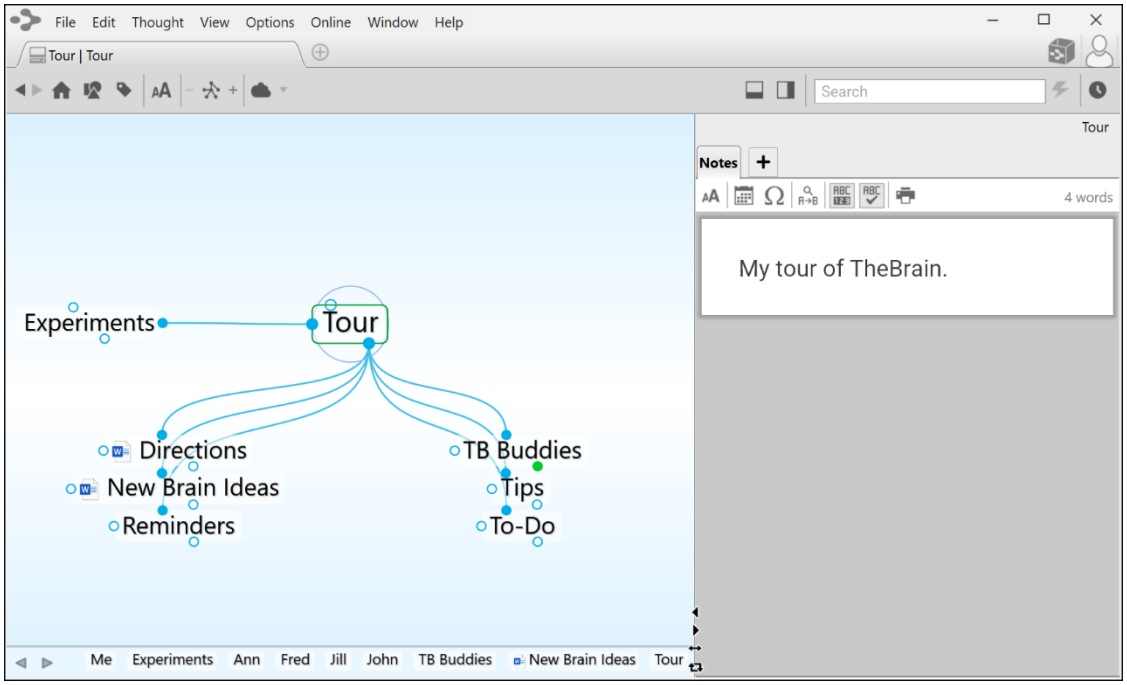



**Figure 34. Completed Tour**

**Where to go from here?** You can stay and experiment more with your Tour Brain, begin reviewing sections of interest throughout this guide, open the Quick-Start Brain, or dive into creating your own Brain. You may want to glance at some of the example Brains at https://thebrain.com/apps for more ideas—but you probably already have plenty of your own!

**Tip:** If you are ready to dive into beginning your own Brain, start by creating a few Thoughts for broad categories before you go to the detail level. For example, if your name is Ed, "Ed's Brain" might be the name of your Brain (and your first Thought) and its first children might be Work, Family, Hobbies, and Friends.

This concludes your guided tour—-thanks for coming along!

# Understanding Thought Relationships

There are no rules governing the relationships between Thoughts—whatever makes sense to *you* is the way your Brain ought to be organized. The three primary relationship types—child, parent, and jump—can be used to express different types of relationships. Sibling is a relationship that is derived from child/parent relationships.

The examples in this section can help you understand the variety of relationships and how they are used. The core concepts behind each type of relationship are as follows:

- **Children**: Child Thoughts are usually used to link more specific information or information that represents a subcategory.
- **Parents:** Thoughts linked as Parents are usually used to link more general information. Parents can also be thought of as higher level categories to classify groups of information. They serve to indirectly connect their child Thoughts as siblings.
- **Jumps:** Jump Thoughts are usually used to link two pieces of information that are exclusively related, meaning that the two items are related to each other but neither represents a group that the other is a part of.

Let's move on to an example to explore these relationship types. Imagine that you are the owner of a company and you are reviewing personnel files. Each employee has a file. You decide it makes sense to organize your employees by department. Your Brain is called My Brain. From My Brain, you create a child Thought called My Company (see Figure 35). My Brain is now My Company's parent Thought. You create four child Thoughts from My Company—Manufacturing, Sales, Service, and Billing. These departments are sibling Thoughts of each other.

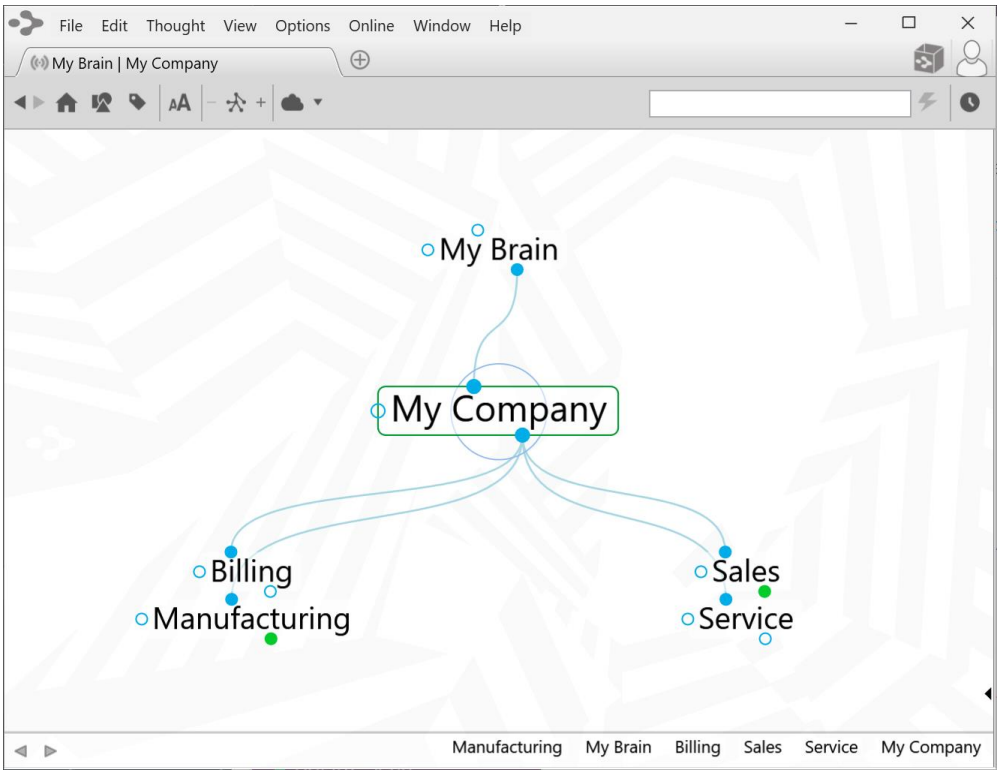



**Figure 35. Sample Brain**

Now you go to each department and create more child Thoughts, one for each employee of the department. If an employee splits time between two departments, you can make him a child Thought of both departments—he'll appear in both and you won't have to duplicate his file. In this example, Bob is a child Thought of both Manufacturing and Sales (see Figure 36). This is one of the most powerful features of TheBrain—having one Thought under more than one heading.

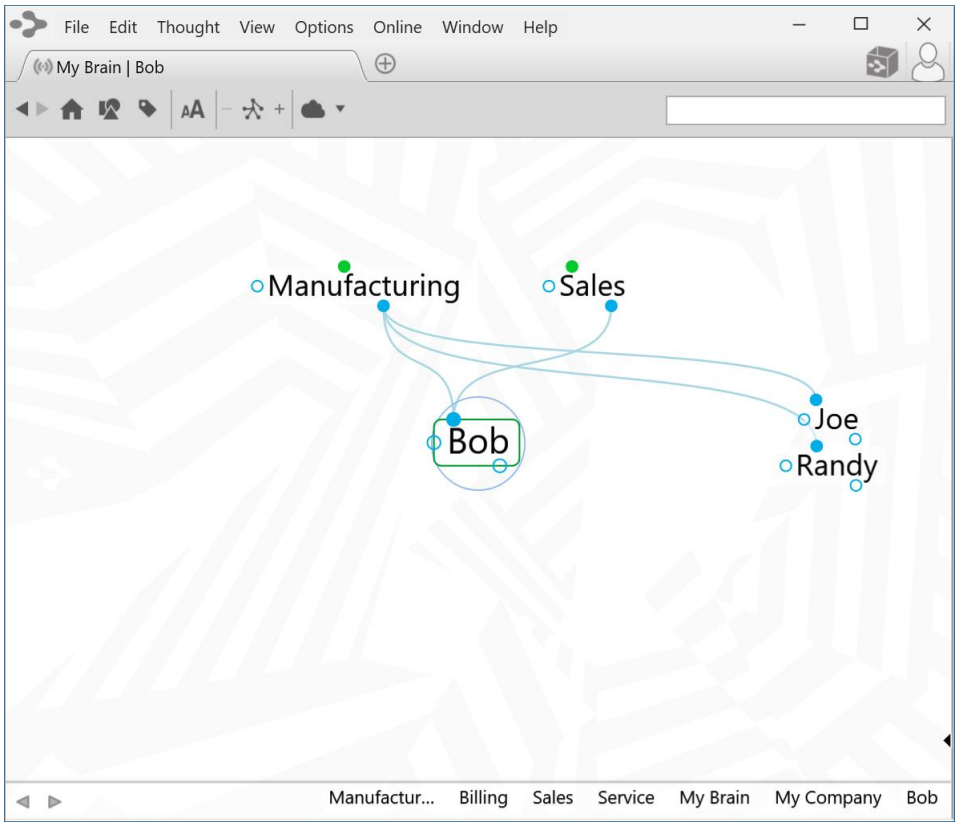



**Figure 36. Child Thought with Two Parents**

If you own more than one company, but have one accountant for all of them, you might want to make a Thought called Accountant and link it as a jump Thought to each company, as shown below.

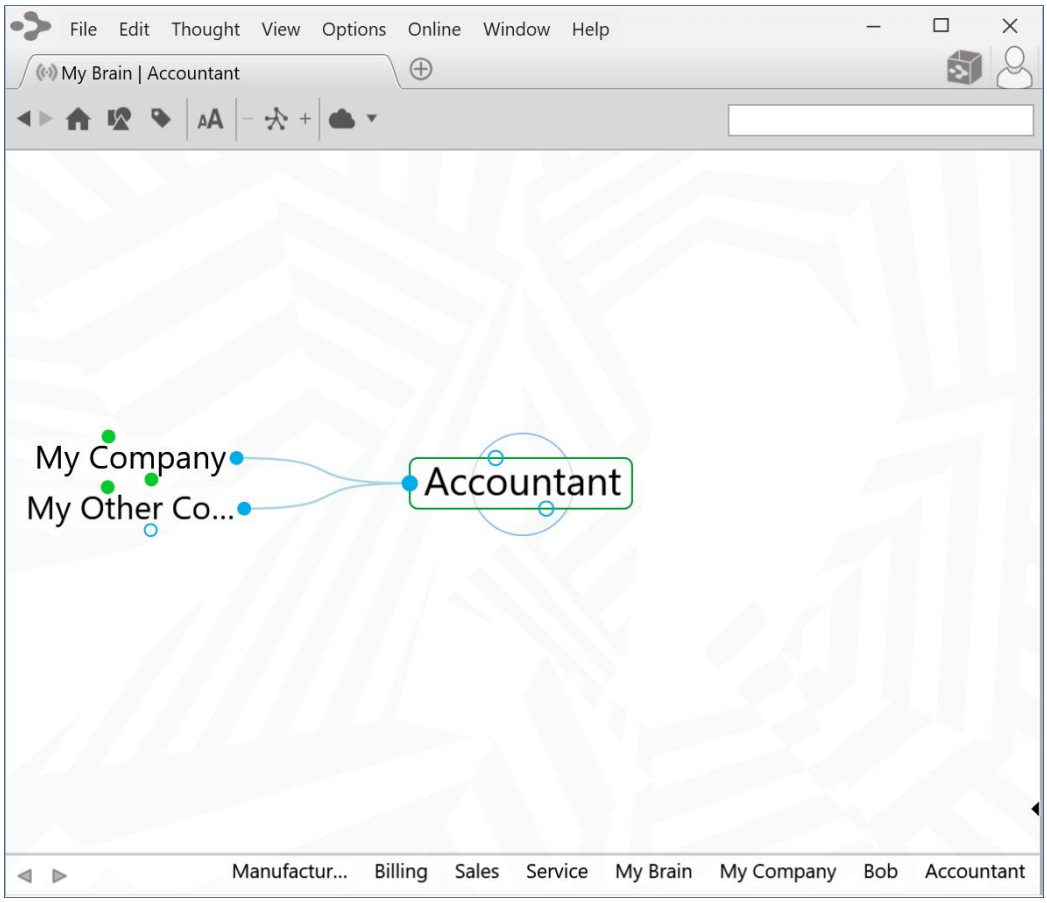



**Figure 37. Jump Thoughts to the Active Thought**

Imagine that Joe's company has just purchased one of your companies. Since Joe's company now owns this company, Joe's Company becomes a parent (see below).

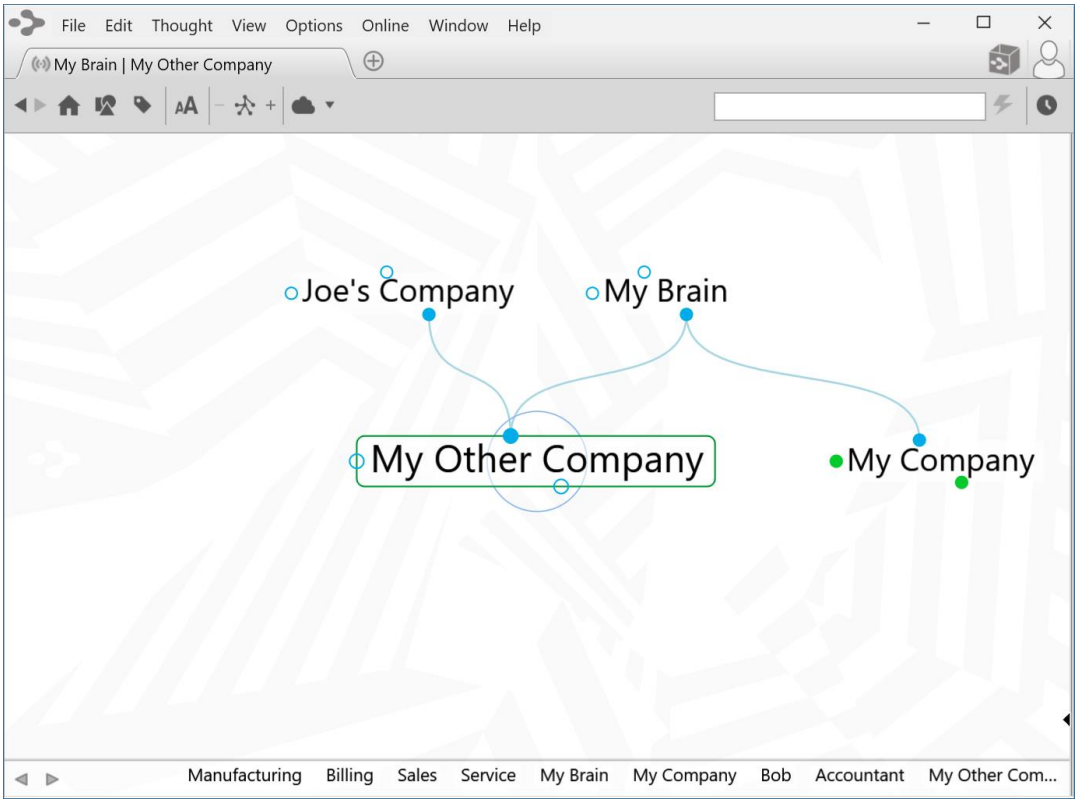



**Figure 38. New Parent Thought**

Because Joe wants to avoid a conflict of interest, the acquired company (My Other Company) no longer uses the same accountant. So its jump gate is hollow, while its sibling's jump gate (My Company) maintains that Link and is filled.

As you use TheBrain, you will develop a sense of the types of relationships you wish to make between Thoughts. It is always easy to change relationships by adding and removing links (see Changing Relationships Using Drag and Drop on page 109).

## Families of Thoughts

It is tempting to view Thought relationships as families, and indeed these different parts of your Brain are types of families, with their ancestry visually spread before you, represented by subjects and categories. But unlike human families, a child Thought can be a parent of one of its siblings and a Thought can have more than two parents.

The complex relationships you can form in TheBrain are the source of its power. Let's consider sibling Thoughts that also share a parent/child relationship.

Let's say you are studying philosophy. You might have a Thought called Philosophy. Individual philosophers such as Plato and Aristotle could be child Thoughts of Philosophy. Each of these siblings, in turn, may have child Thoughts. Aristotle was a student of Plato, so you may want to make Aristotle not only a child of Philosophy, but of Plato, so that when you're working with Aristotle, Plato is only a Thought away.

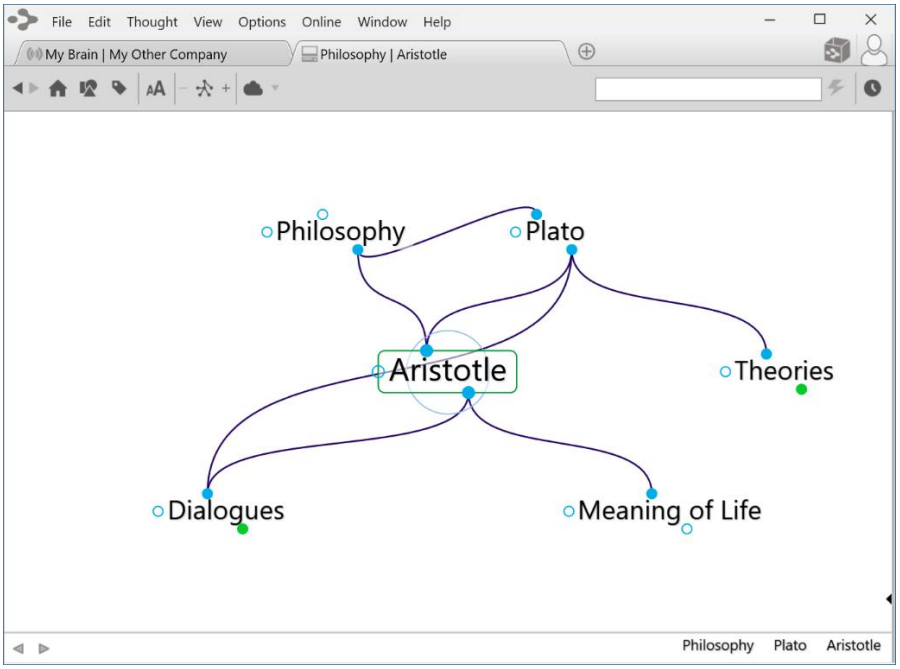



**Figure 39. Example of Parent/Child Relationships**

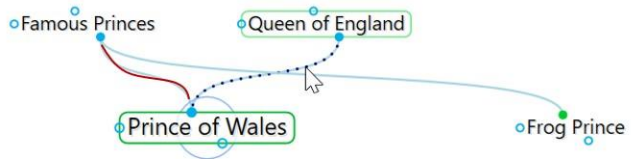
Notice that when Philosophy and Plato are in Aristotle's parent *zone*, their relationship (Philosophy is a parent Thought of Plato) is shown by the line linking the child gate of Philosophy to the parent gate of Plato.

Clearly, TheBrain is a powerful method of organizing ideas and information. No hierarchical file structure can provide as much cross-referenced information at a glance. And our example is pretty basic—a fully developed Brain can hold many more relationships and much more information.

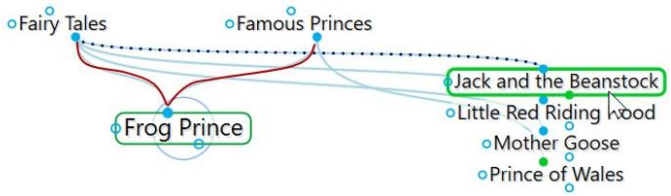
# Navigating Your Brain

All Thoughts can be connected—directly or indirectly—even Thoughts that may seem to have nothing to do with each other can be related through a chain of links.

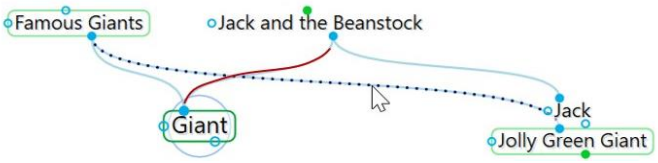
Let's look at an example, say, the Queen of England and asparagus. You have a Thought called Queen of England. One of its child Thoughts is Prince of Wales, which has a parent Thought Famous Princes that is also linked to the story of the Frog Prince.



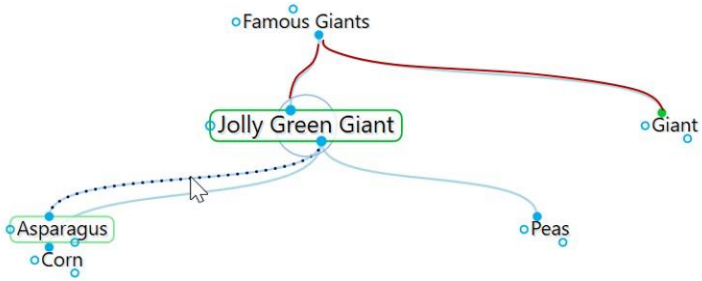

The story has another parent Thought called Fairy Tales. A sibling of Frog Prince is Jack and the Beanstalk.




Jack and the Beanstalk has child Thoughts called Giant and Jack. Giant has another parent Thought called Famous Giants.




Famous Giants has a child Thought called Jolly Green Giant. Jolly Green Giant has child Thoughts named after canned vegetable products, one of which is Asparagus. Thus, the Queen of England is connected to asparagus!



Depending on the relationship you create between them, Thoughts may be closely or distantly related. Thoughts are considered to be closely related when they are linked directly or are siblings. In the default view of the Plex, only close Thoughts of the active Thought are always displayed in the Plex. Thoughts that are one additional step (generation) away from the active Thought can be displayed by expanding the view. See Advanced Navigation and Alternate Views on page 143 for information about the different view options.

## Opening a Brain

When you log into TheBrain 11, and no Brain is open, all local, synced or online Brains will be displayed as thumbnails in the **Brains** tab, as shown below. This is assuming that you have already created one or more Brains. Clicking on a Brain thumbnail opens that Brain.

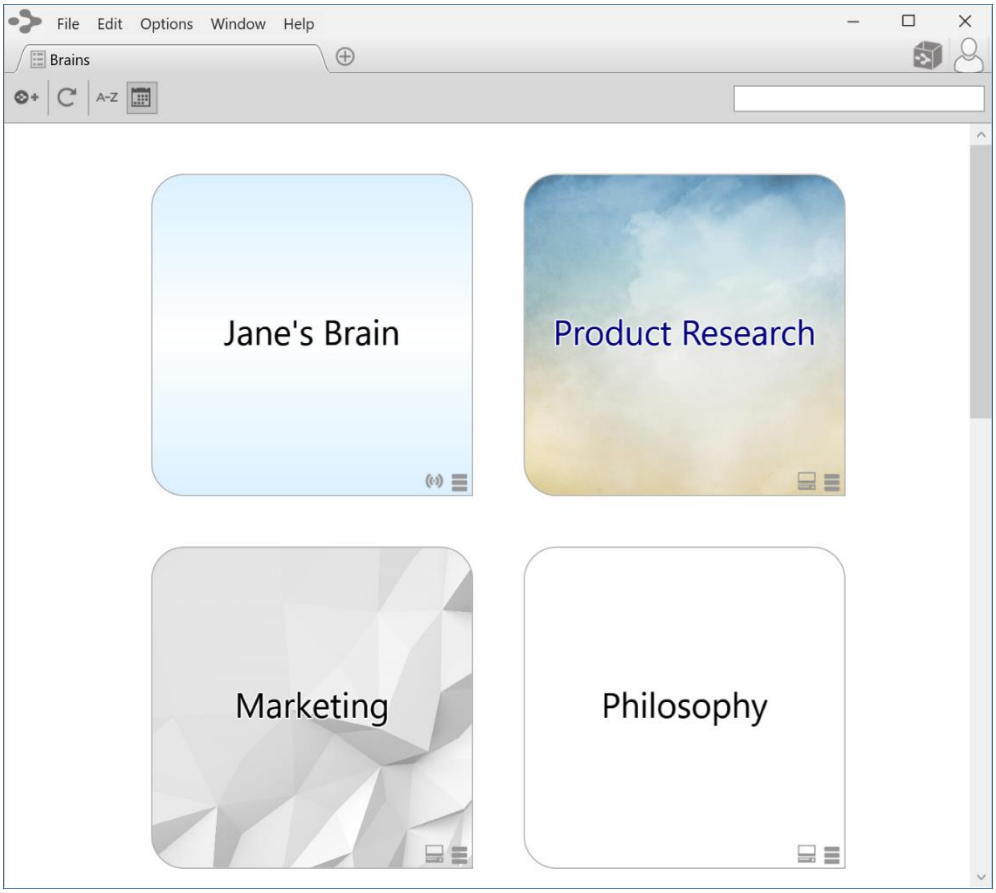



**Figure 40. Example of Three Available Brains on the Brains Tab**

By default, Brains are listed according to how recently they have been accessed. You can also see the list of Brains sorted alphabetically using the **Brains** tab toolbar, shown below. All Brains that are locally available are shown first, followed by Brains that are available online.

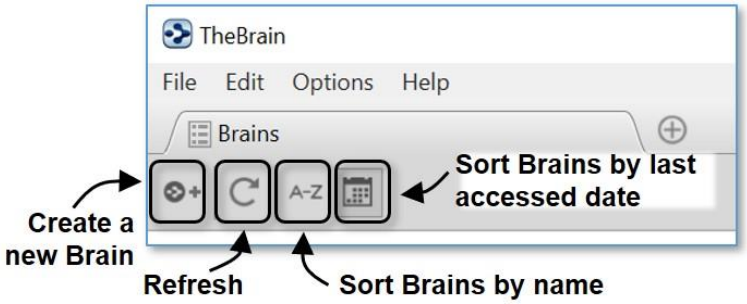



**Figure 41. The Brains Tab Toolbar**

The status of whether each Brain is available locally, online, or both is also displayed. Each Brain in the **Brains** tab will have an icon appearing in the lower right-hand corner of the thumbnail. Right-click on a Brain or click on the status icon to display a menu of options for that Brain, as shown below. The appearance of the icon(s) help you identify whether the Brain is Local, Synced (local and online) or Online only.

**Figure 42. Icons Indicating Local, Synced, or Online Only**

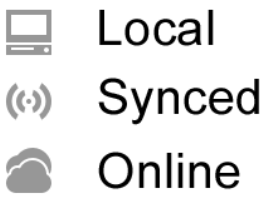



**Figure 43. Status Indicator Icons**

## Opening a Brain that Doesn't Appear in the Brains Tab

If you have a Brain from an older version or from a backup, it will not appear in the Brains tab until you import it. Click the **File** menu, then the **Import** command. Choose the type of file you want to import, then click the **Select File** button, navigate to the .Brain file of your choice, then click the **Open** button when the file is selected. Click the **Import** button after TheBrain has finished converting the Brain.

## Managing Brains Using the Tabs

The tabbed interface of the Plex lets you switch instantly between Brains or even keep the same Brain open in multiple Brain tabs or windows

To re-open the **Brains** tab to display the Brain thumbnails, click the **+** icon to the right of the last tab.

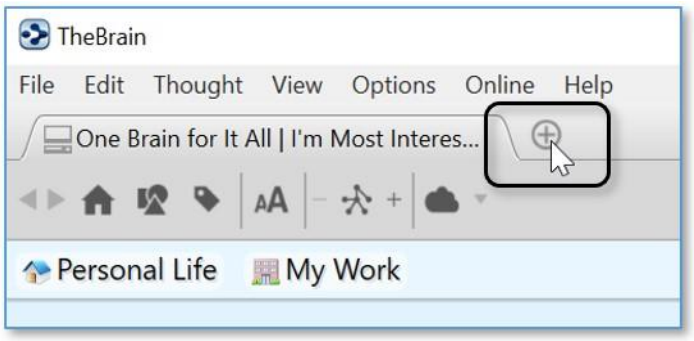



**Figure 44. Click the + Icon to Open the Brains Tab**

There is no limit to the number of Brains you can open at once. Each time you open a Brain it will appear in a separate tab. Switch from Brain to Brain instantaneously by clicking its tab. All tabs and their states are automatically saved and restored when you quit and restart.

- **Float tabs** into their own dedicated window by dragging a tab out of TheBrain application window. This creates a new Brain application window with just a single tab.
- **Merge tabs** into one window by dragging and dropping. Click the tab of one Brain window and drag the tab to another open Brain, hovering over the tab area. Then release the mouse button.
- **Open the same Brain in multiple tabs** to view and edit multiple areas at a time. This lets you view different areas of your Brain at the same time, and, if you like, use a different layout in each tab. Note that tabs are simply views into the same Brain data and changes made in one tab affect all other tabs of that Brain.
- **Duplicate Tabs**. Right click on a brain tab to duplicate it, showing the same content in a new Brain tab.

## Opening Content Associated with a Thought

As you navigate through your Brain, the content associated with the active Thought is displayed in the Content Area. Notes associated with the Thought are displayed automatically. There are several ways to open an attached file or web page:

- Click on the tab for the attachment, then click the **Open** icon.
- Click on the attachment icon in the Plex.
- **Right-click** on the Thought, then click **Open Attachment** on the context menu.

## Showing Thought Content on Hover

By default, the content for the active Thought displays in the Content Area. If you prefer, you can display content for any Thought your mouse pointer hovers over by changing the setting. To do so, click the **Options** menu (**TheBrain** menu on macOS), click **Preferences**, click the **Behavior** tab, then select the "Update displayed content on hover" check box. Close the **Preferences** window when you're finished.

## Previewing Thought Content

Certain types of file attachments are automatically previewed inside of TheBrain. These include web pages, images, text, markdown files, JSON, .html files and PDFs. Simply click on an attachment's tab and its preview will be shown. In the example below, Tropical Getaways is the active Thought and there are two attachments in the Content Area—a Word document and an image. The tab for the image has been selected.

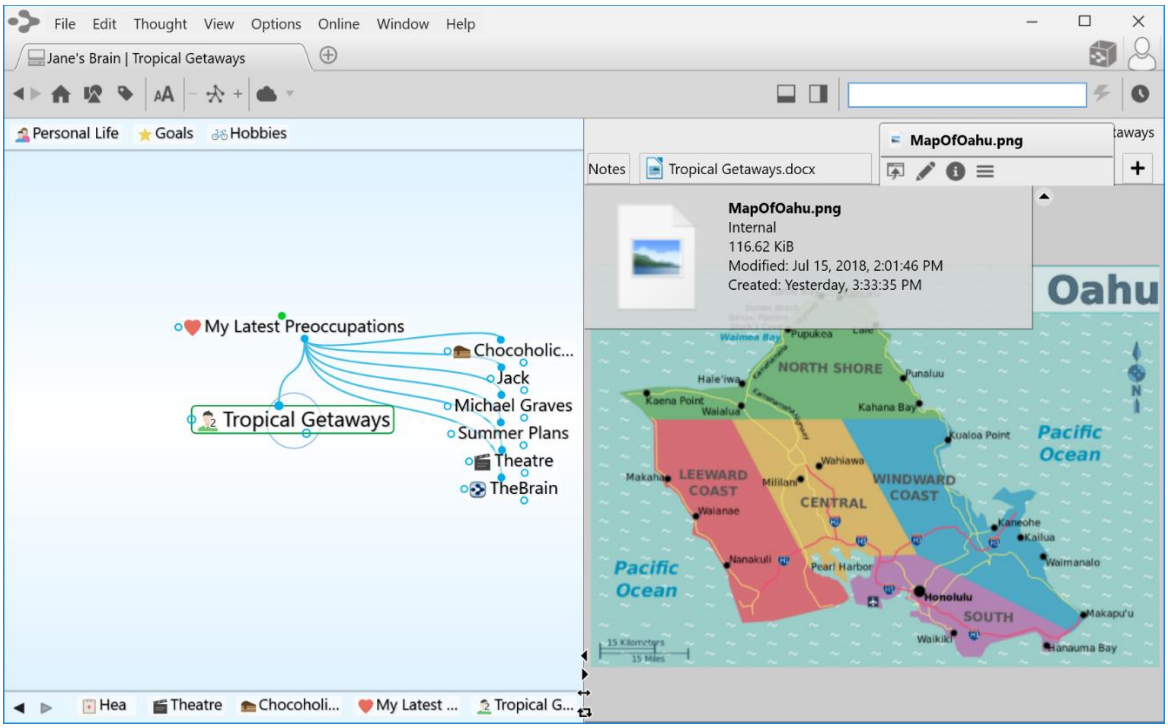



**Figure 45. Content Area for the Active Thought**

The PDF preview features:

- Supported rendering for each OS
- Very large, multi page PDFs
- Thumbnails of each page, zoom, rotation, search and printing
- All PDF commands can be mapped to a custom keyboard shortcut

## Editing Additional Attachments

Adding additional attachments to a thought, such as .md and .txt files will enable you to also edit these attachments the same as you would a Brain Note. To quickly add an additional Note to a Thought, click on the **Add Attachment** tab and select **Add Note**.

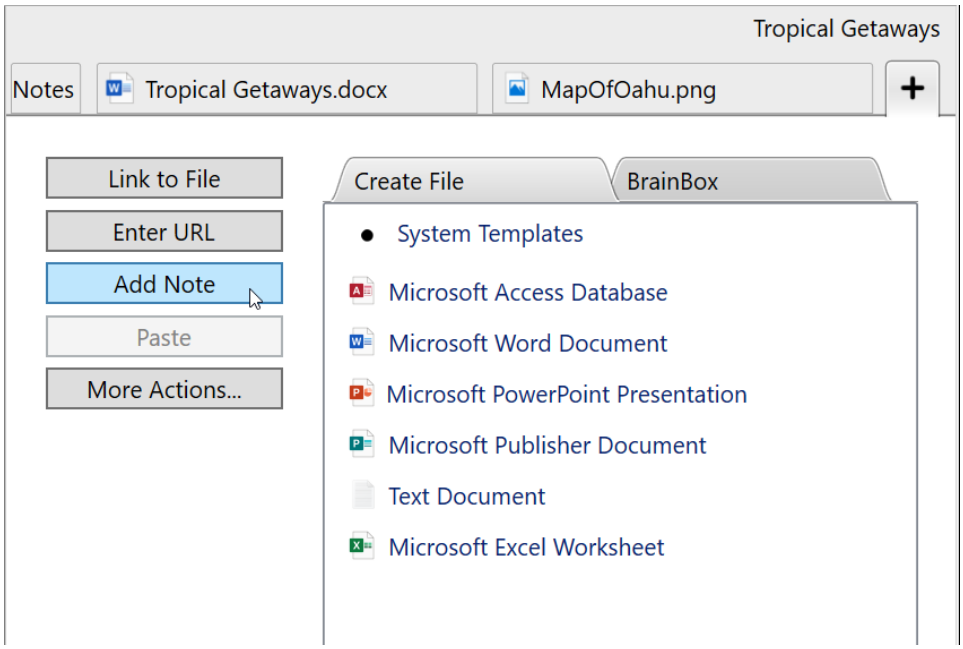



**Figure 46. Adding an Additional Note**

## Pins

As you saw if you went along on the Guided Tour of TheBrain earlier, pins are shortcuts to Thoughts to which you want quick access. They appear at the top of the Plex, just below TheBrain toolbar. No matter where you are in your Brain, the pins remain visible.

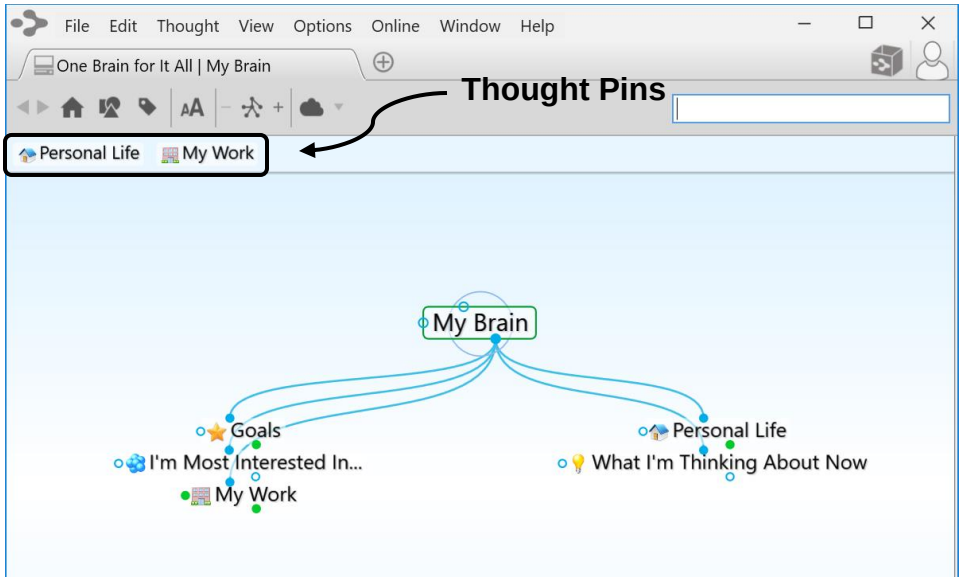



**Figure 47. Pins**

**To create a pin:**

- Right-click the Thought for which you want to create a pin, then click **Create Pin** on the context menu

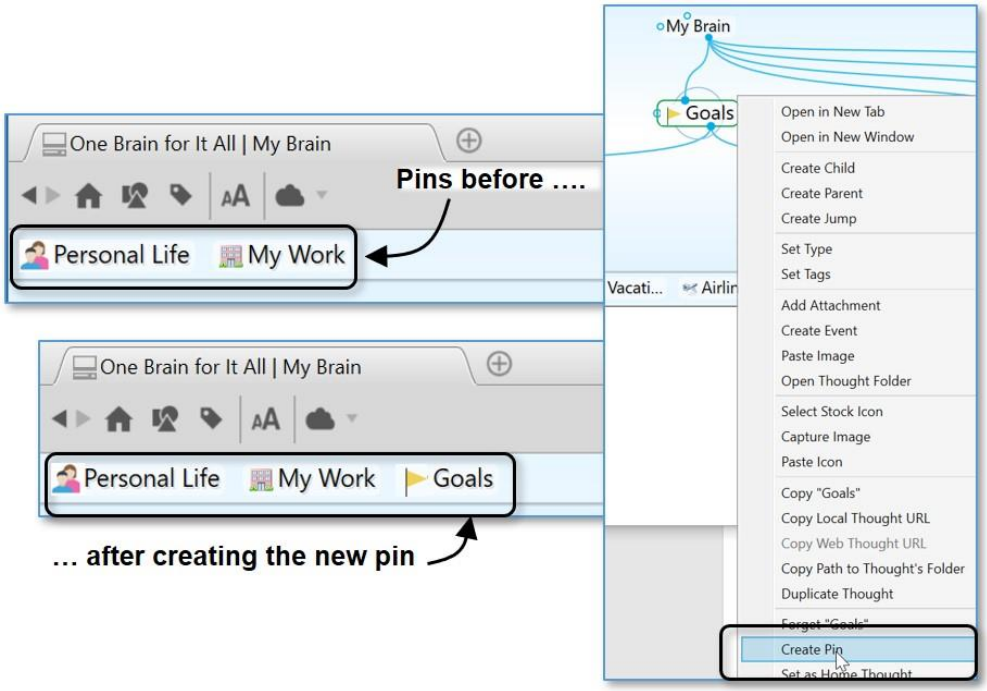



**Figure 48. Creating Pins**

**To remove a pin:**

- Right-click the pin or on a Thought that has a pin, then click **Remove Pin** on the context menu

Removing a pin does not remove or delete the associated Thought; it deletes only the reference to it at the top of the Plex.

**To use a pin to link Thoughts:**

- Drag from one of the Thought gates to the pin, or
- Move your mouse pointer over a pinned Thought and gates will appear; drag from one of these gates to the Thought you want to link

## Activating Recent Thoughts: The Past Thought List

TheBrain keeps a running breadcrumb trail of your Thoughts based on activation and displays it in the Past Thought List. You can think of the Past Thought List as the visual representation of the phrase, “train of thought”—a scrollable list of Thoughts in the order you activated them. The Past Thought List is displayed at the bottom of the Plex window.

Clicking on any Thought in the Past Thought List activates that Thought. Also, when a new Thought is created it appears in the Past Thought list immediately.

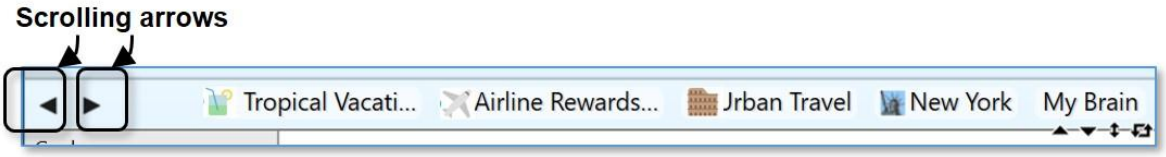



**Figure 49. Past Thought List**

The arrows located to the left of the Past Thought List enable scrolling to see items that don't fit on the display.

The most recently activated Thought (the current active Thought) appears at the right end of the list.

**To use a Thought in the Past Thought List to link Thoughts:**

- Drag from one of the Thought gates to one of the Thoughts in the Past Thought List, or
- Move your mouse pointer over a Thought in the Past Thought List and gates will appear; drag from one of these gates to the Thought you want to link

In the example below, Tropical Vacations is going to become a parent of Airline Rewards; the mouse is being dragged from the parent gate of Airline Rewards to Tropical Vacations.

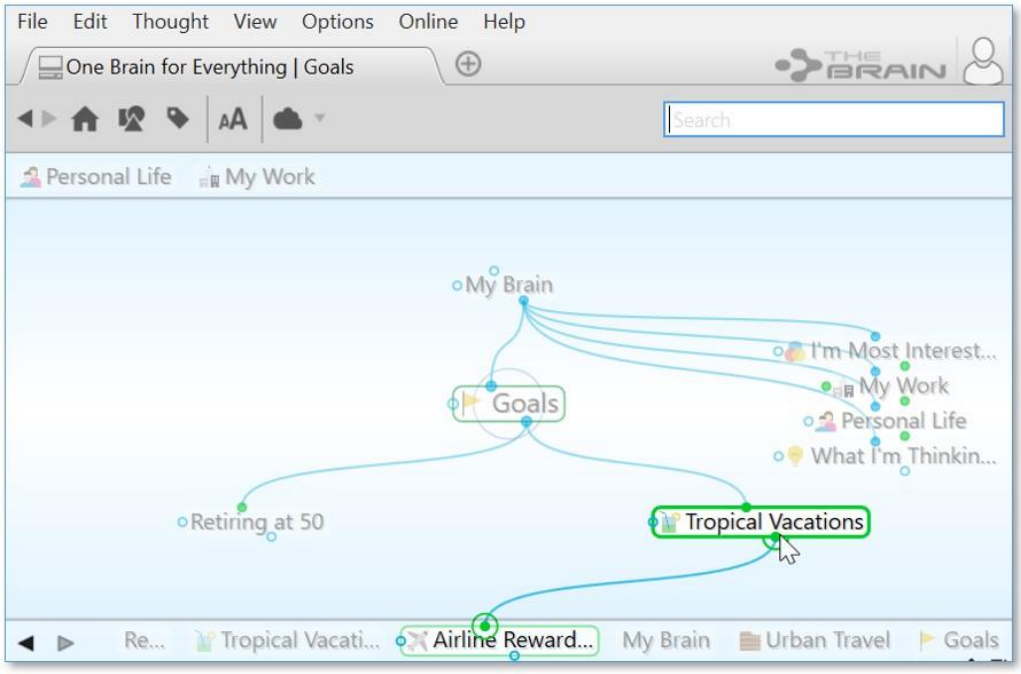
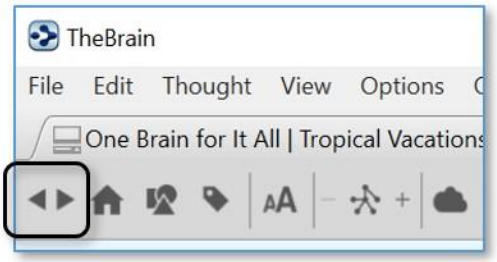



**Figure 50. Creating a Link from the Past Thought List**

### Using the Back and Forward Buttons:

- In addition to the Past Thought List, you can also use the **Back** and **Forward** buttons, located near the top of the Window, to quickly retrace your steps; these buttons work just like they do in a web browser




- Click the **Back** button to go back to the last active Thought
- Once you have clicked the **Back** button, the **Forward** button can be used to re-activate the Thought you came from

**Back and Forward Mouse Buttons:** The back and forward buttons available on some mice (typically on the left side of the mouse near where you place your thumb) may be used to navigate backward and forward in your Brain. These mouse buttons perform the same navigation as the **Back** and **Forward** buttons in the Brain toolbar, shown above.

## Searching Your Brain

### Instant Activation

TheBrain includes powerful search capabilities. The Search box is in the top-right area of the application.

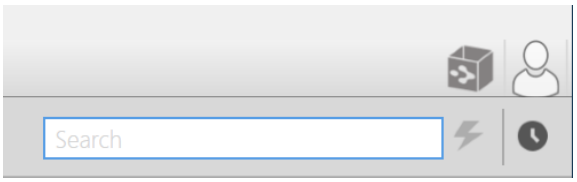



**Figure 51. The Search Box**

The term “instant activation” refers to TheBrain’s ability to quickly find whatever you’re searching for and activate the related Thought. You can easily scan the search results as you type in the Search box. There's no need to click in the Search box, your cursor is always there by default, unless you are actively typing in the **Notes** tab or another field.

To activate one of these results, click it with your mouse or use the **up-arrow**, **down-arrow**, **page up**, and **page down** keys on the keyboard then press the **Enter** key.

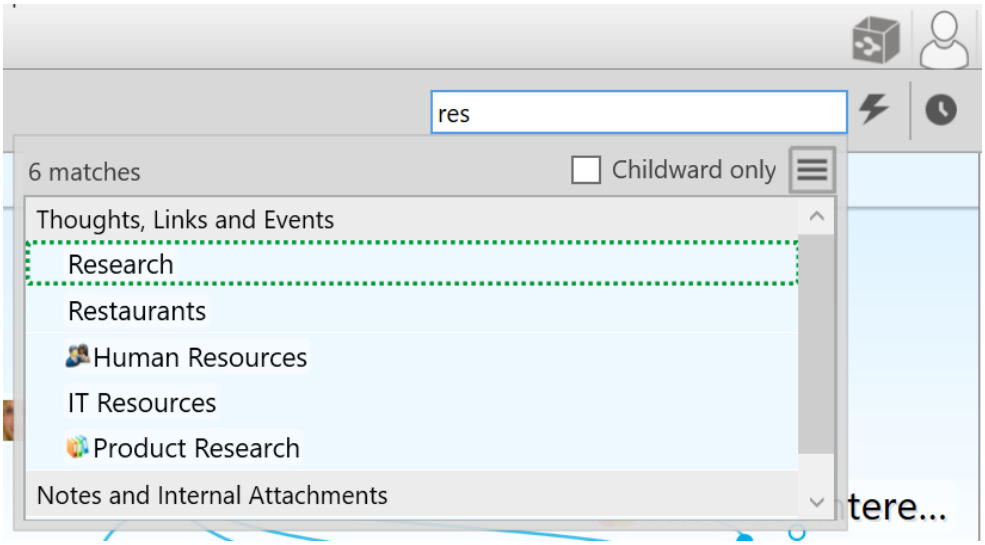



**Figure 52. Instant Activate Finds Matches Based on Thought Names, Labels, Notes, and Attachments**

Accents are ignored when matching Thought names. Also, when two or more matches with the same name are found, the names of their parent or jump Thoughts are also displayed so you can differentiate them.

You can search for Thoughts by typing the first letter(s) of separate words and the letters can be in any sequence; for example, to find the “Family and Friends” Thought you could type “fa fr,” or “fr fa,” or “fa and fri.”

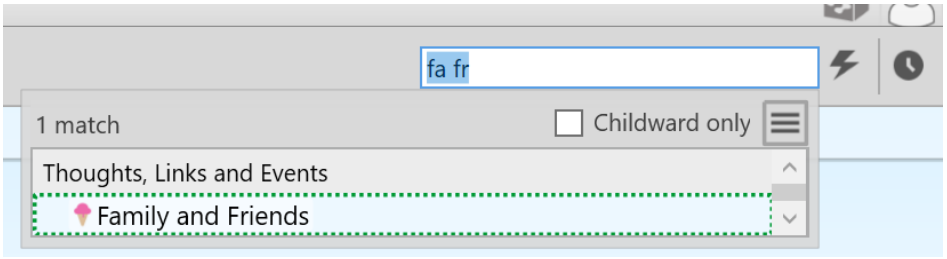



**Figure 53. Use First Letters of Separate Words for Instant Activate**

Attachments and Note search matches are identified with a yellow piece of paper icon for Notes and a paper clip icon for Attachments.

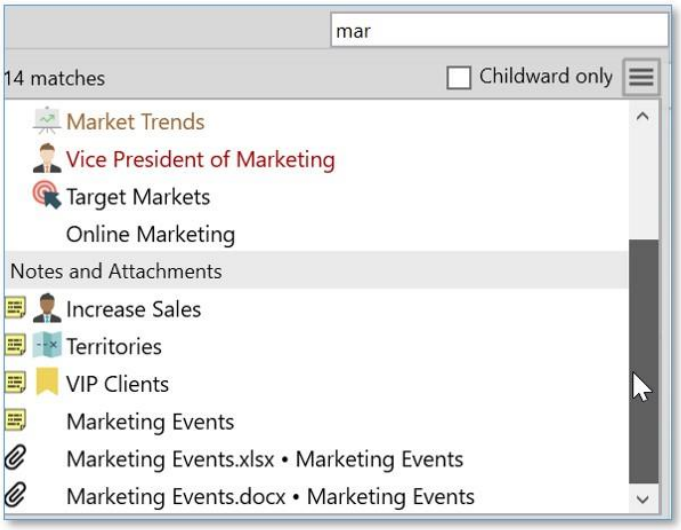



**Figure 54. Search Results**

When you do a search, the results are sorted with results that match Thought names first, then notes, then attachments. Within the Thought name matches, they are ranked in groups:

- **Exact Matches**—where the entire name of the thought matches the entire query
- **Starting Matches**—where the entire query occurs at the start of the Thought name
- **Continuous Matches**—where the entire query occurs anywhere in the Thought name
- **Matches**—where every term in the query occurs somewhere in the Thought name

Within each group, Thoughts that have been activated in the last 30 days will be shown first, ordered with the most recently activated first. Thoughts that have not been activated within 30 days are sorted alphabetically.

Activate a Thought quickly by typing it's name in the Search box and pressing **Enter** without waiting for search results to appear.

## Searching within Attachments

Your searches automatically include matches based upon the contents of attachments. If the text you're searching for exists within documents including

PDFs, Word, Excel, PowerPoint and many other file formats, the documents containing the text will be found.

On Windows, TheBrain utilizes Windows Desktop Search to provide search results to Brain notes and file attachments.

TheBrain integrates with Spotlight on macOS to provide search results from within file attachments. No setup or additional steps are required to enable this functionality.

For searches in TheBrain to return accurate results, Windows Desktop Search or Spotlight will need to have access to the location where your Brains are being stored. For more information on your Brain storage, see page 75.

## Additional Search Functionality

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.)

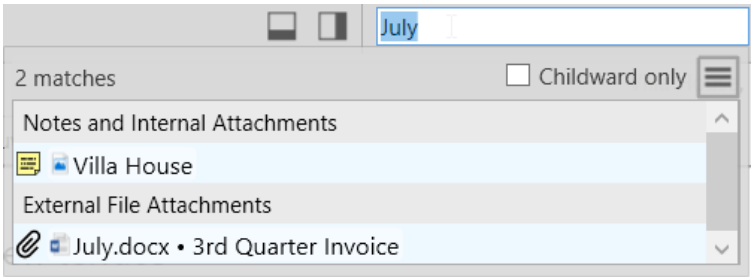



**Figure 55. Search Finding External Attachments**

# Customizing Your Brain's Environment

You may choose to use your Brain just as it's offered "out of the box" or you may choose to change some of the environmental settings to suit your personal preferences.

## TheBrain's Default Settings

Without making any changes, here's what your Brain looks like:

- The area where your Thoughts appear (the Plex) will be the color and design of one of TheBrain's "Themes." The initial theme is randomly selected and you can change it at any time.
- The left half of TheBrain window will display your Thoughts and the right half of the window will display the "Content Area" which holds Notes and any other items you will attach to your Thoughts—files, web pages, Events, etc.
- Your Thoughts will be displayed in "Normal" view, meaning that you will see only the direct parents, children, jumps, and siblings of the active Thought.

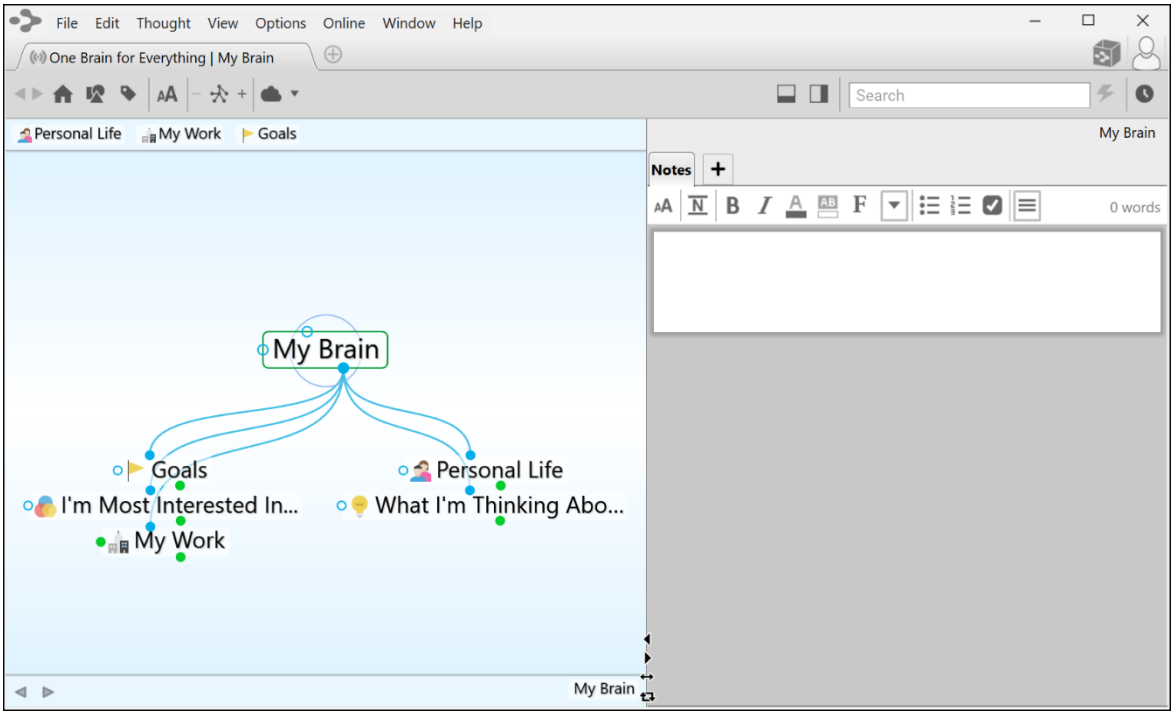



**Figure 56. TheBrain Window with Default Settings**

## Using Smart Splitter to Arrange TheBrain Window

The smart splitter controls let you manage where the Plex and Control Area display relative to each other in TheBrain window.

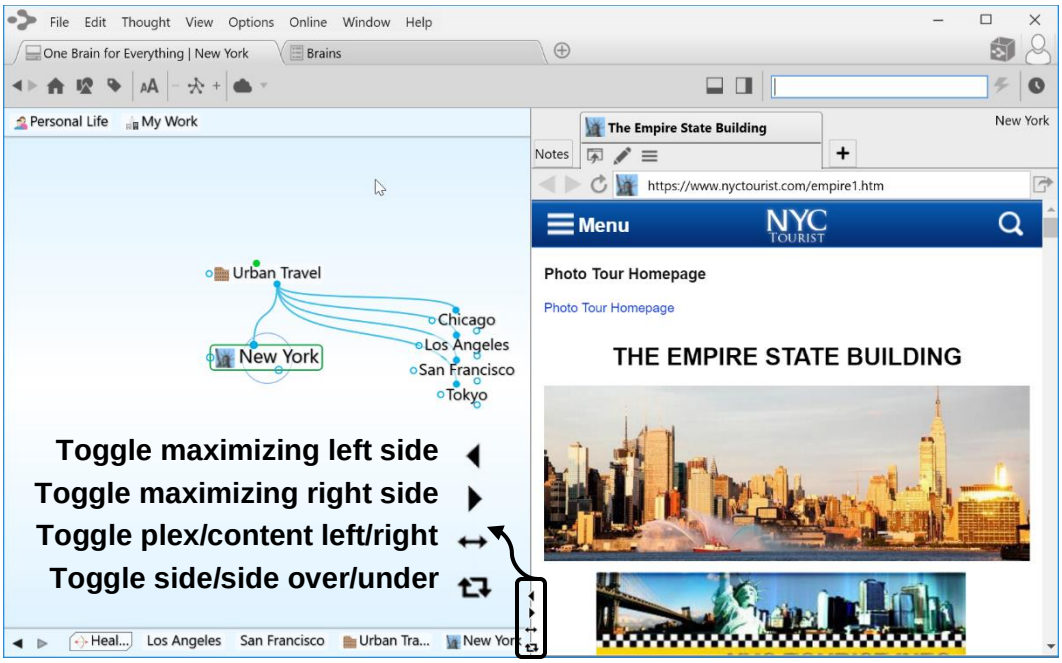



**Figure 57. Smart Splitter**

- Click the individual left- and right-arrows (or up- and down-arrows if the window is in "over-and-under" mode) to maximize the area the arrow is pointing towards (either the Plex or the Content Area).
- Click the double-headed arrow icon to toggle the Plex to the right or left side of the Content Area.
- Click on the two-arrow icon that forms a box to toggle between seeing the Plex and Content Area "side-by-side" or "over-and-under."
- You can also point at the border between areas and click and drag when the double-headed arrow appears to move the border.

## Moving Thoughts in the Plex

When the default settings are in use and the Plex is in "Normal" view, you can move the Thoughts in the Plex up or down by dragging (up or down) in any blank area of the Plex background.

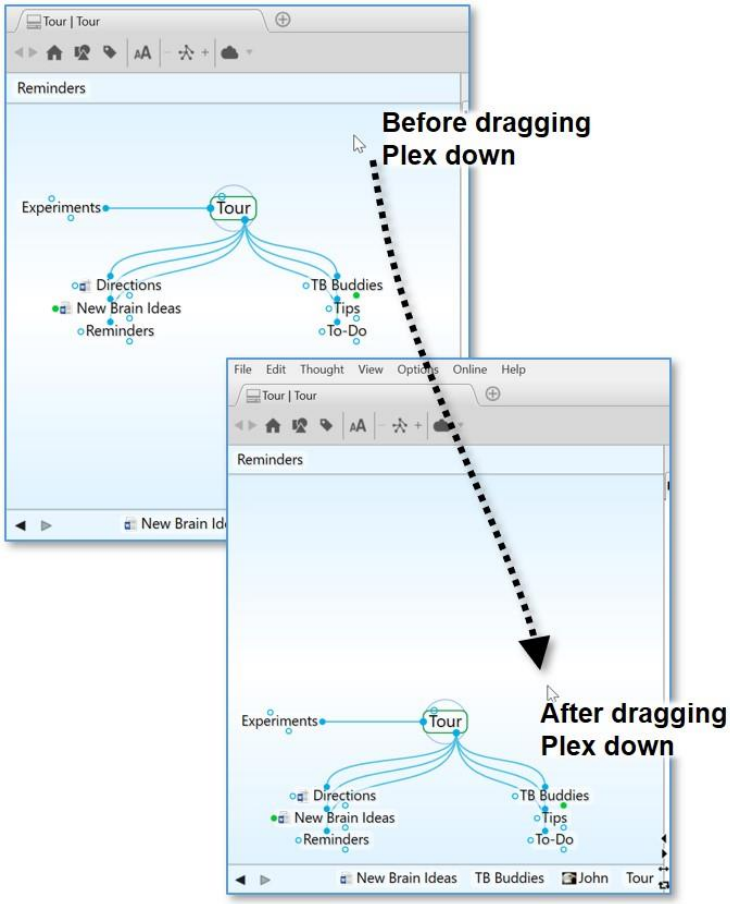



**Figure 58. Dragging the Plex Vertically**

## Resizing the Thoughts in the Plex

The Plex is the heart and soul of TheBrain. You can change the size of Thoughts in the Plex by using TheBrain toolbar or your keyboard and mouse.

**To change the size of Thoughts using the toolbar:**

- Click the **AA** button to activate the slider, then click and slide the bar up or down to grow or shrink the size of your Thoughts.

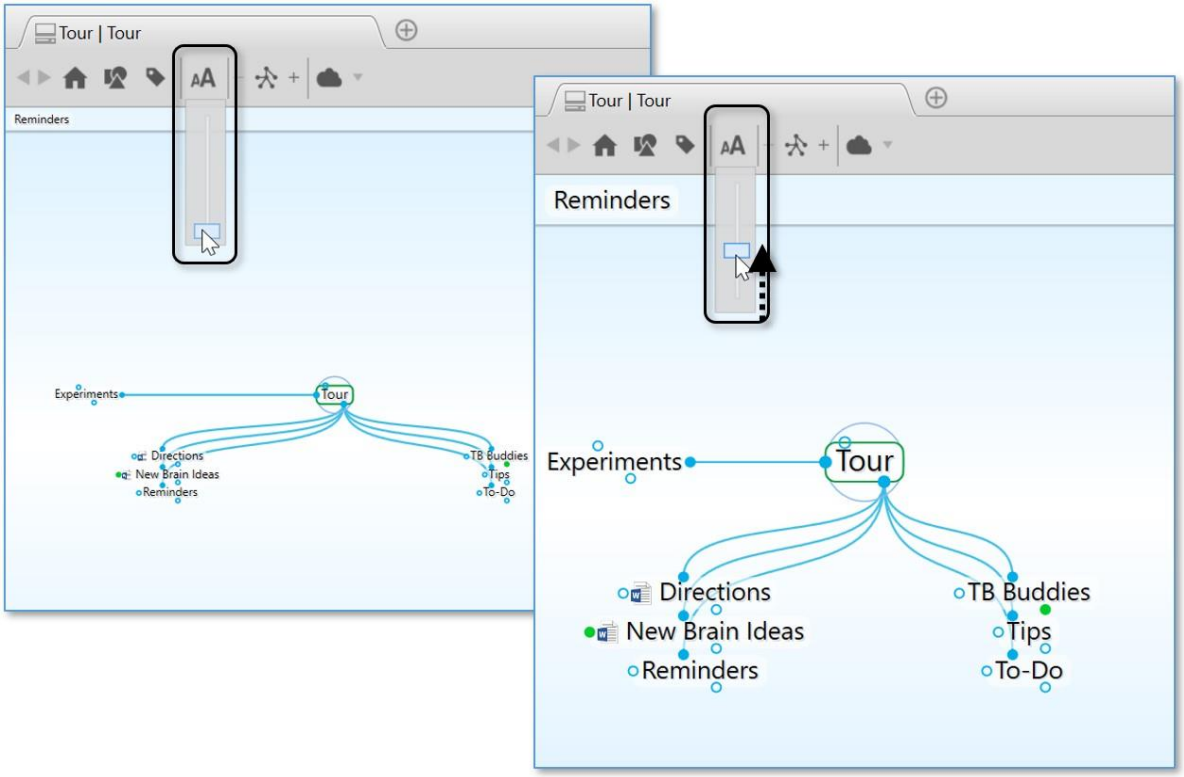



**Figure 59. Resizing Thought Size with the Slider**

**To change the size of Thoughts using the keyboard, mouse, or trackpad:**

- Hold **Cmd** (macOS)/**Ctrl** (Windows) on your keyboard and scroll up or down on your mouse wheel or trackpad while your mouse pointer is in the Plex.

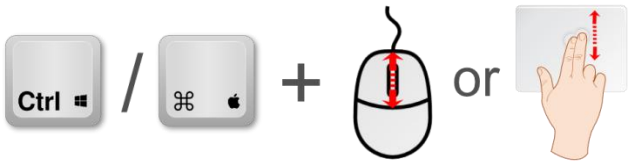



**Figure 60. Resizing with the Mouse or Trackpad**

- Hold **Cmd** (macOS)/**Ctrl** (Windows) on your keyboard and press **-** to make Thoughts smaller or **+** to make Thoughts larger.

**Figure 61. Resizing with the Keyboard**

- Pinch to zoom on a macOS Trackpad.

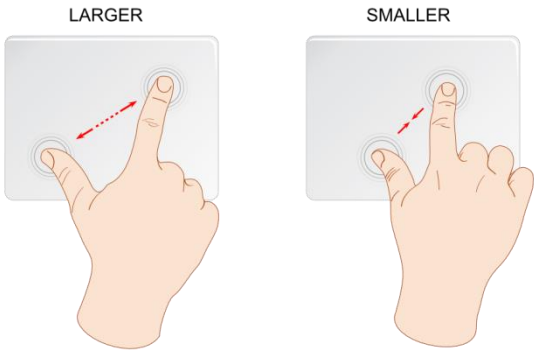



**Figure 62. Resizing on a Trackpad**

# Customizing Your Brain's Appearance

## Selecting a Theme

The Themes feature lets you choose from many built-in designs to customize the look of your Brain, including the appearance of the Plex and Notes in the Content Area. You can change many of the default colors and the style of Notes associated with the Theme, then save the look of your Brain as a new Theme. This lets you quickly switch from one saved Theme to another.

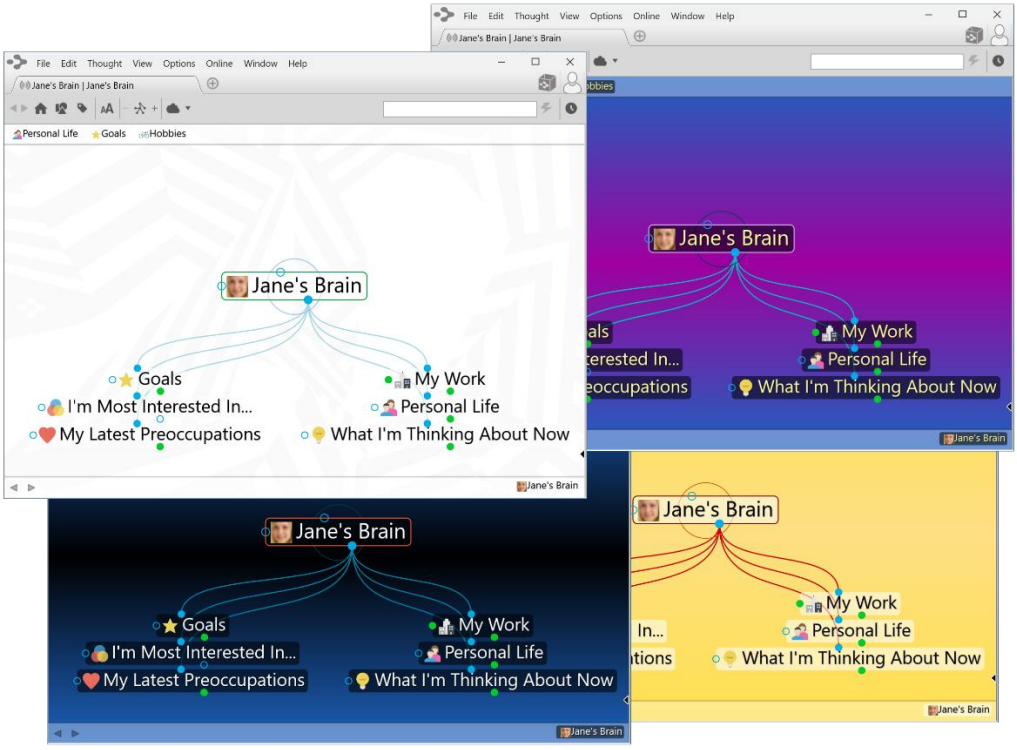



**Figure 63. Sample Themes**

**To select a Theme:**

1. Ether click the **Options** menu in TheBrain toolbar (**TheBrain** menu on macOS) or right-click any blank space in the Plex.

2. Click the **Brain Theme** command.

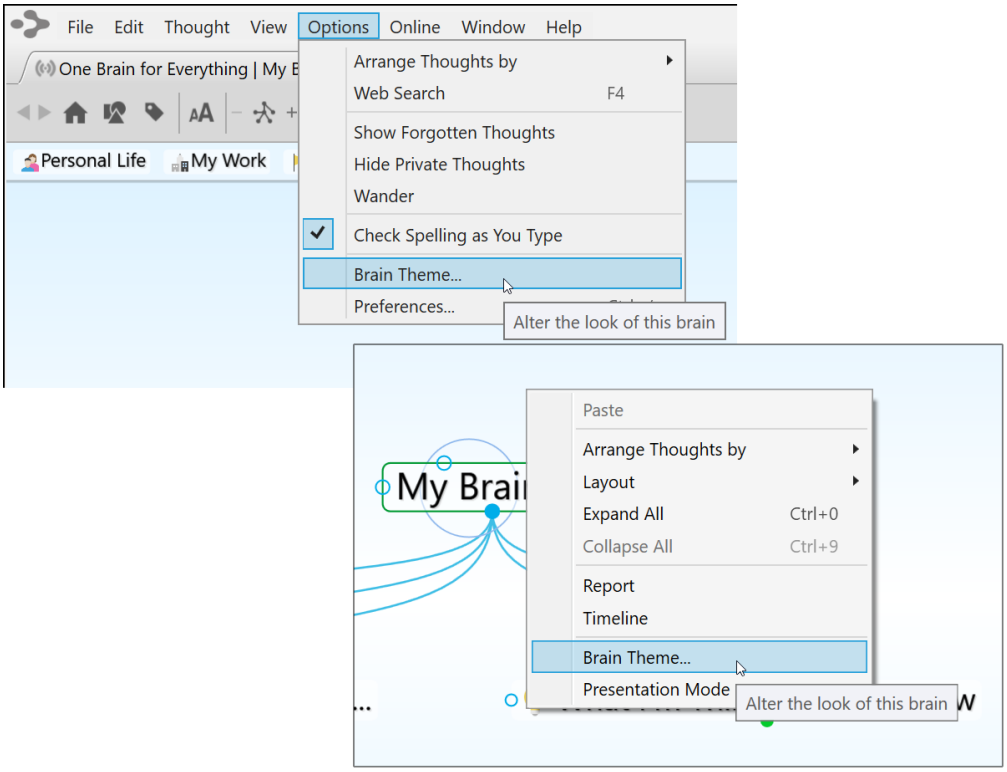



**Figure 64. Accessing the Brain Theme Window**

In the **Brain Theme** window, you'll see a scrollable list of available themes in the left panel and **Colors** and **Options** tabs in the right panel. Click on any Theme to see how it looks in the Plex.

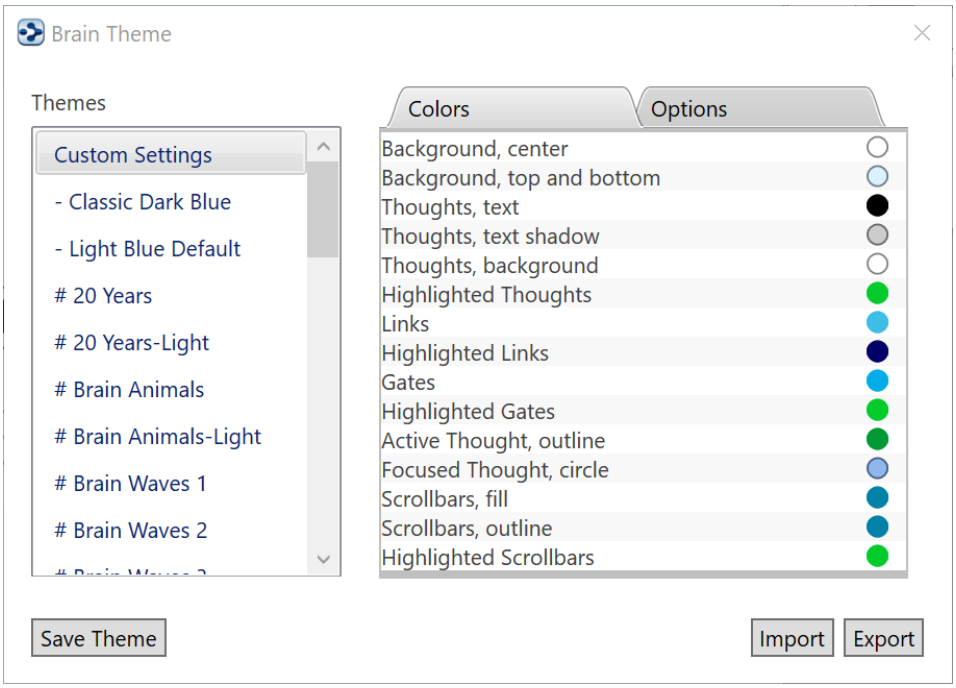



**Figure 65. The Brain Theme Window**

## Customizing a Theme's Colors

Have the **Brain Theme** window open when you want to customize a Theme (right-click a blank area of the Plex, then click the **Brain Theme** command).

The default colors for virtually all items in the Plex vary based on the selected Theme. The current color for each item is shown in the circle to the left of the item's description. Scroll through the list in the **Colors** tab to get an idea of all of the items that can be changed.

**To change the colors in the selected Theme:**

1. Click the item whose color you want to change to display your choices.

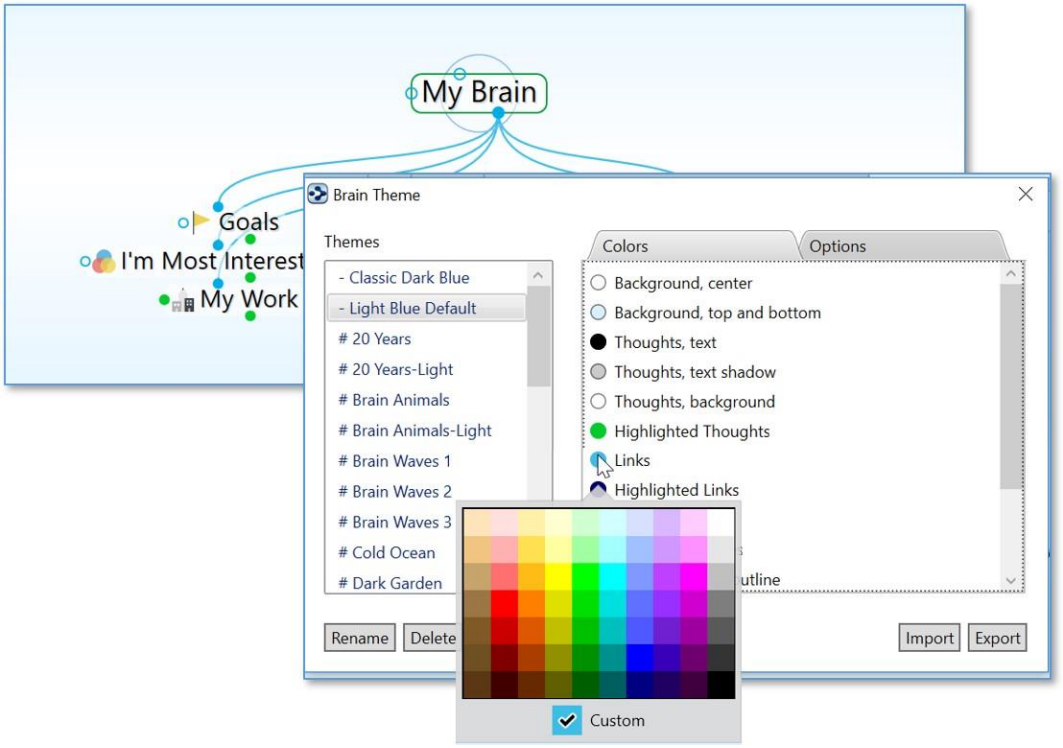



**Figure 66. Color Choices in the Colors Tab**

2. Click the color of your choice, then click outside of the box of colors to close it.

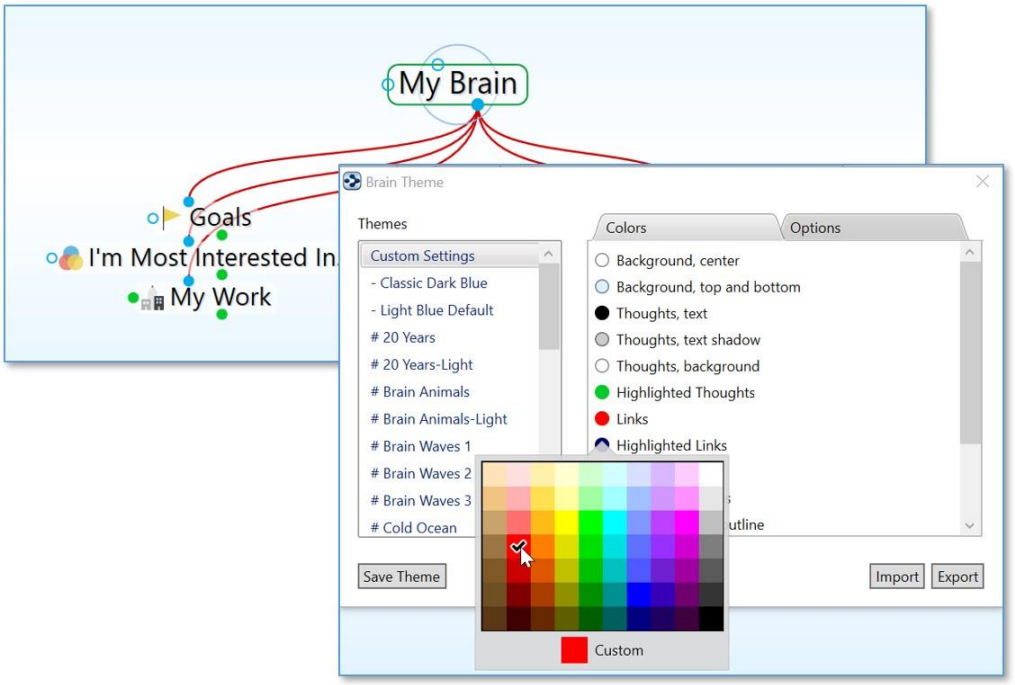



**Figure 67. New Selected Color for Links**

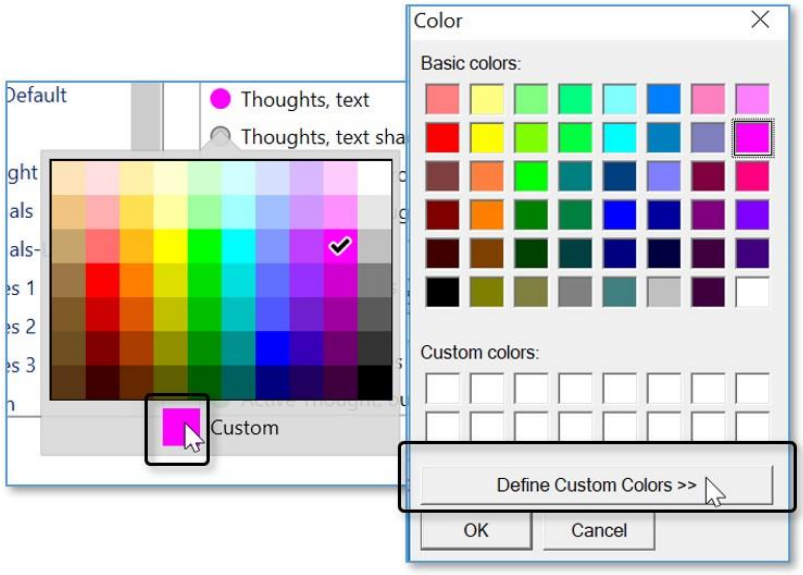
Note that while you can change the color of the shadow for Thought text using the theme's **Color** tab settings, you can toggle whether or not text shadows are displayed using the **Look & Feel** tab of the **Preferences** window (as explained in the Look & Feel Preferences section on page 72). By default, text shadows are displayed.

When you are happy with your color selections, click the close button (X) in the **Brain Theme** window.

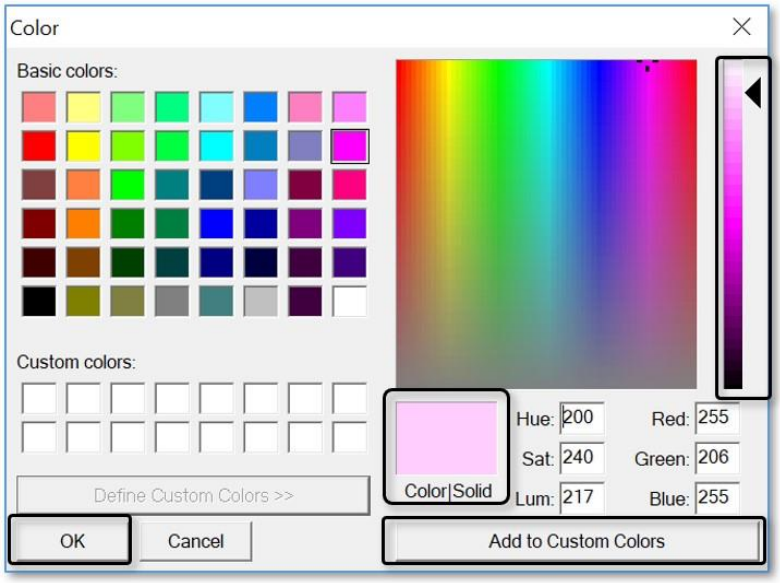
## Defining and Selecting Additional Colors

You can add additional customized colors if you don't see the exact shade you want.

1. In the color selection box, click the color that's closest to what you want, then click the box next to "Custom," then click the **Define Custom Colors** button.




2. The **Color** window will expand to provide a slider to fine-tune the shade. You can also select a different color and fine-tune it or type in specific RGB or HSL numbers. Click the **Add to Custom Colors** button when you're happy with the sample color, then click the **OK** button.




## Selecting a Custom Image for the Plex

If you want to use an image of your own instead of using one in the Themes list of the **Brain Theme** window, it's very easy to do so.

**To select your own background image:**

1. Click the **Options** tab in the **Brain Theme** window, then click the **Wallpaper** check box.

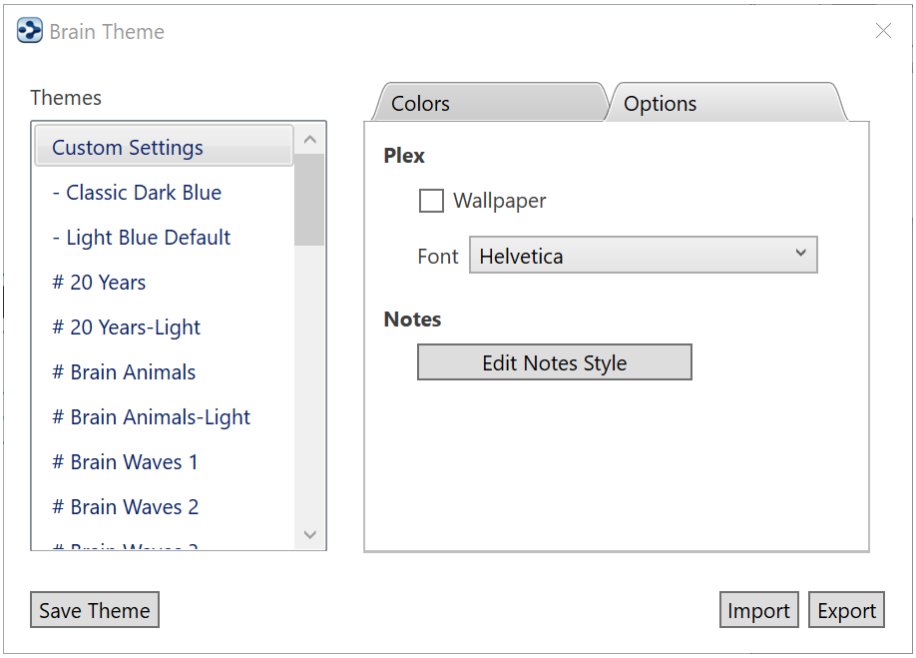



**Figure 68. Options Tab in the Brain Theme Window**

2. In the **Select image file as the wallpaper** window, navigate to the location of your image file, click on it, and then click the **Open** button. Supported wallpaper file formats include .jpg, .gif, and .png.

3. Click the close button (X) in the **Brain Theme** window to save your new image for the Plex.

**To replace or remove a wallpaper image:**

- To replace the image, click the **Select** button next to the **Wallpaper** check box to navigate to a different image.
- To remove the image, click the **Wallpaper** check box to toggle off the check mark and remove the image from the Plex.

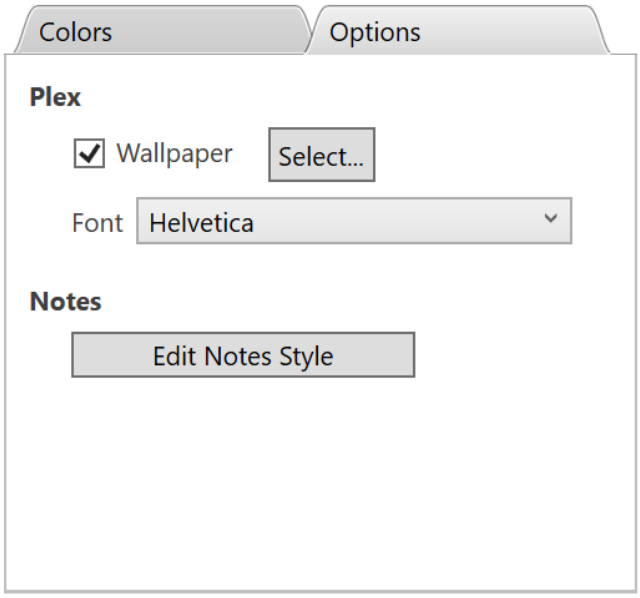



**Figure 69. Replacing or Removing Wallpaper**

**To dynamically select new Wallpaper from a web site:**

1. Go to a web site that offers Wallpaper files, right-click the design of your choice, then select **Copy** on the context menu.

2. Return to your Brain, right-click in any blank area of the Plex, then select **Paste Wallpaper** on the context menu.

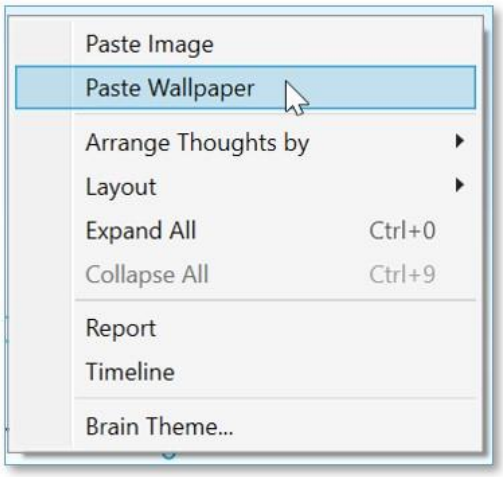



**Figure 70. Context Menu on the Plex**

## Changing the Default Text Font in the Plex

By default, the font for text that appears in the Plex is Helvetica. You can change it to any font installed on your machine:

1. Click the **Options** tab in the **Brain Theme** window, then click the drop-down button for **Font**.

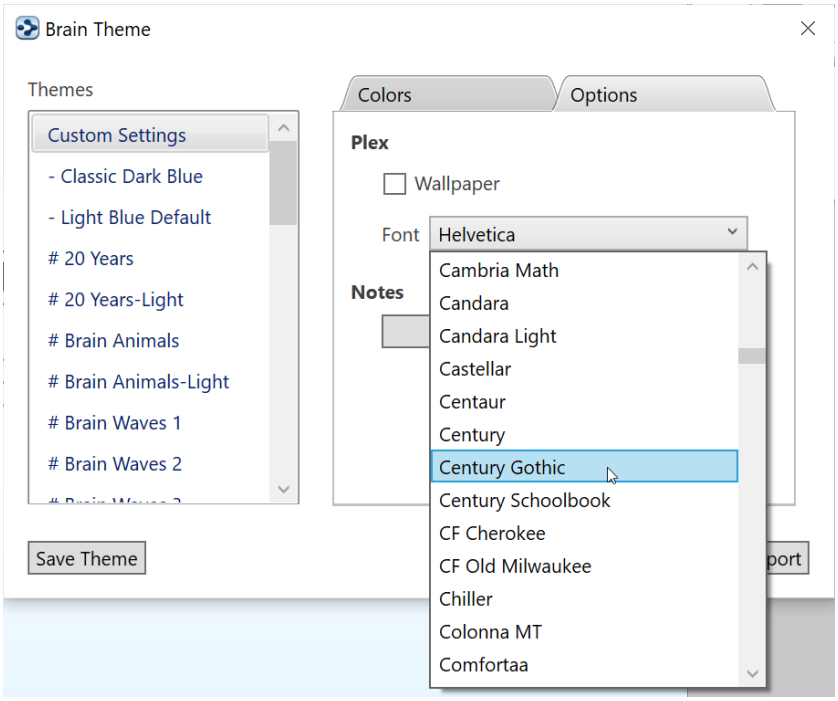



**Figure 71. Changing the Font for Plex Text**

2. Click the font of your choice. You will see the text in the Plex update automatically.

## Changing the Default Notes Style

By default, the Notes in the Content Area of your Brains appear in a style called "Modern," which is a sleek and clear combination of font, color, and size.

**To select a different style for Notes:**

Click the **Edit Notes Style** button on the **Options** tab in the **Brain Theme** window. There is also a Notes Style button in the Notes Toolbar.

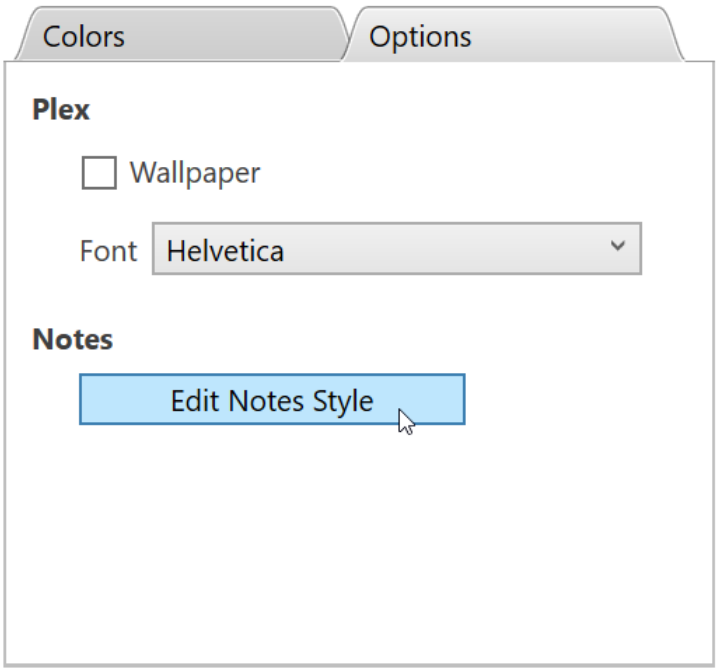



**Figure 72. Changing the Style of Notes**

In the Edit Notes Style window, click on any paragraph or heading to change the font, justification and line settings for that paragraph or heading type. For further variation, italics can also be toggled on or off.

You can also select custom colors for your Note's Text, Links, Page, Edge and Background. Some Prebuilt Styles are also available. When selected or modified, the Note preview in the right column of the Edit Notes Style window will be updated.

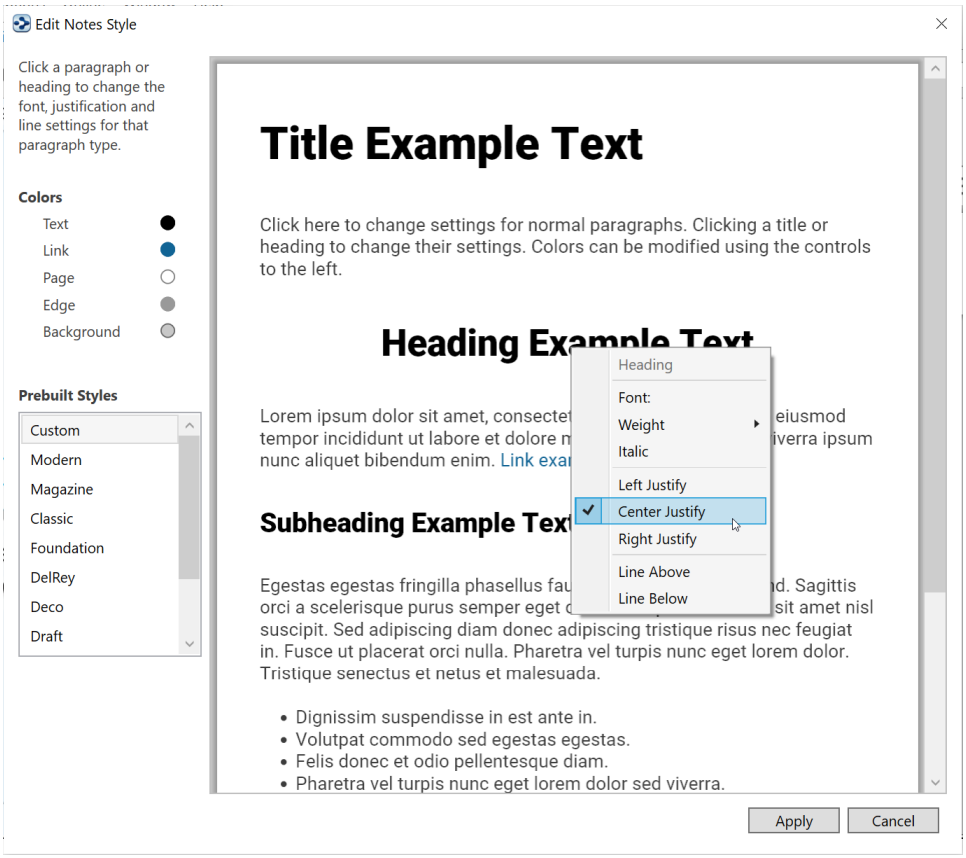



**Figure 73. Custom Note Style Options**

When you are happy with your Notes modification choices, click the Apply button and X in the **Brain Theme** window to save your new Notes styles, which are applied immediately.

## Reverting to the Original Theme's Default Settings

As soon as you make any changes to a Theme, "Custom Settings" will be selected in the Themes list.

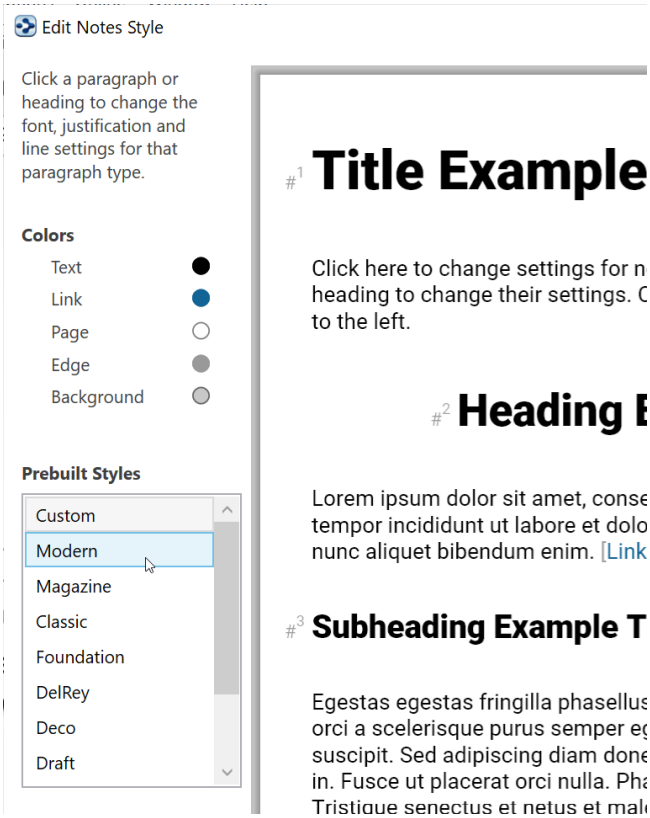



**Figure 74. Selecting a Prebuilt Style**

To switch back to the original settings for any Theme, select the Theme name in the Themes list within the **Brain Theme** window.

## Saving Themes

1. Make sure the tab with the Brain that has the Theme you want to save is active in the Plex.

2. Unless the **Brain Theme** window is already open, either click the **Brain Theme** command on the **Options** menu or right-click a blank area of the Plex, then click the **Brain Theme** command.

3. Click the **Save Theme** button, then type a name for your new theme in the field.

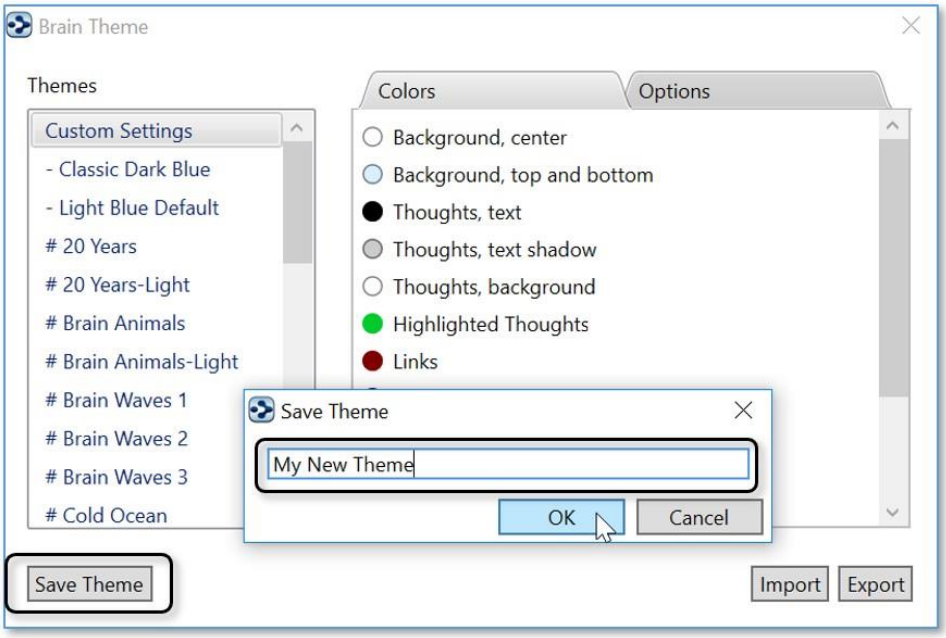



**Figure 75. Save a Theme**

4. Click the **OK** button. Your new Theme will be inserted into the list of Themes, ready for use in your other Brains.

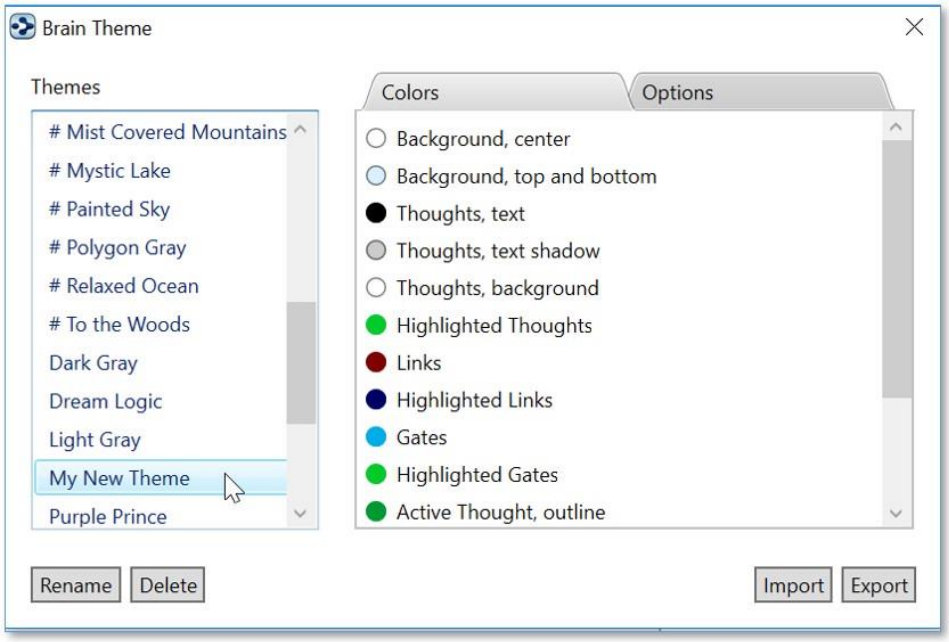



**Figure 76. Newly Saved Theme in the Themes List**

Your saved Theme will also include customizations you have made to the Notes Style.

## Renaming a Theme

1. In the **Brain Theme** window, click the Theme you want to rename, then click the **Rename** button.

2. Type or revise the current name, then click the **OK** button (or press the **Enter** key).

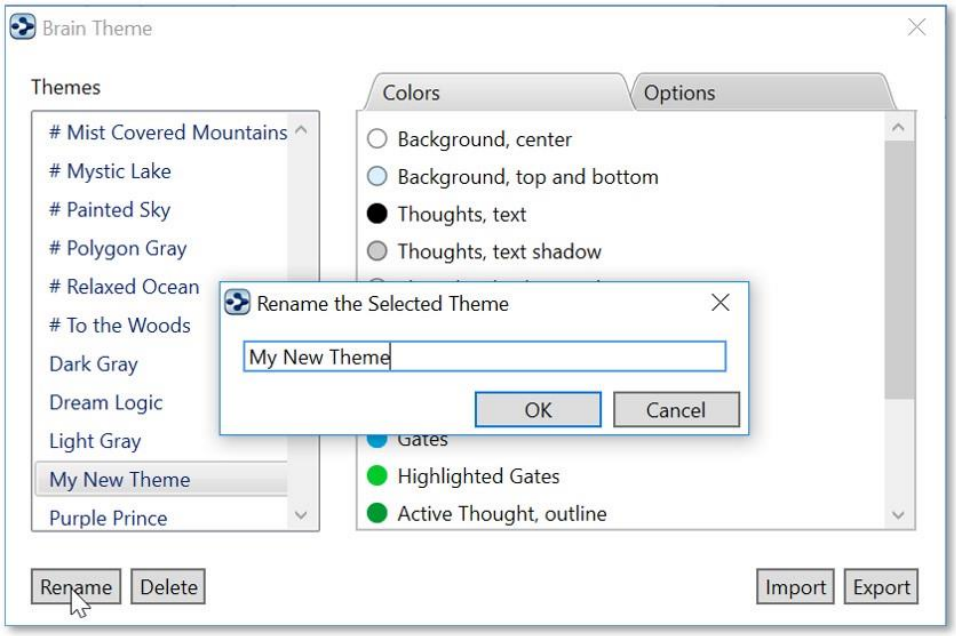



**Figure 77. Renaming a Theme**

3. Click the close button to close the **Brain Theme** window.

## Deleting a Theme

1. In the **Brain Theme** window, click the Theme you want to delete, then click the **Delete** button.

Clicking on a Theme that you want to rename will activate this Theme in your Brain. You may want to save your current Theme first (if it has been customized) before renaming another, existing Theme.

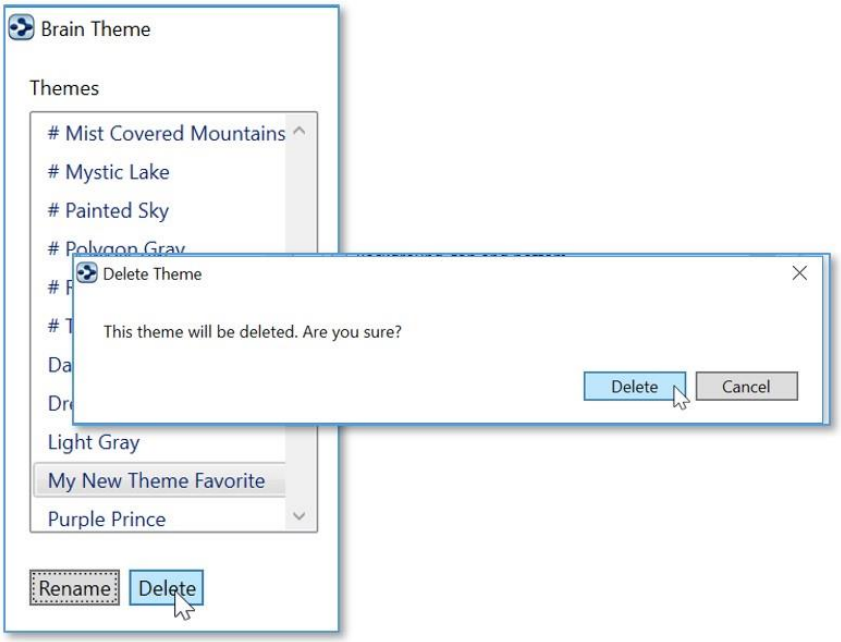



**Figure 78. Deleting a Theme**

2. Click the **Delete** button to confirm that you're sure you want to delete the Theme.

3. Click the close button to close the **Brain Theme** window.

## Importing and Exporting Themes

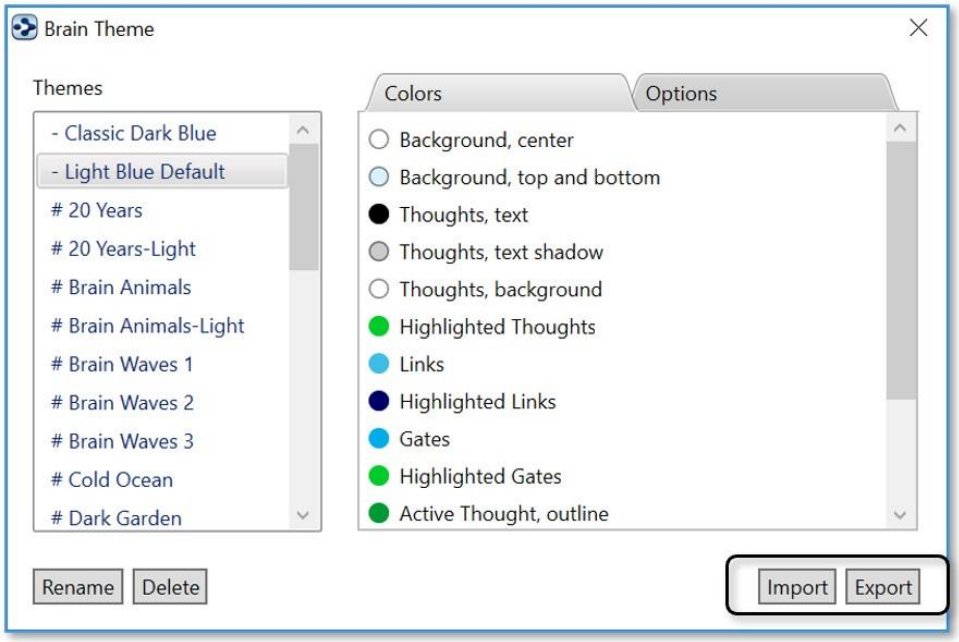



**Figure 79. Importing or Exporting a Theme**

**To import a Theme:**

- Click the **Import** button, navigate to the location of the .BrainTheme file you want to import, select it, then click the **Open** button.

**To export a Theme:**

- Make sure the Theme you want to export is in the active Brain tab.
- Click the **Export** button, navigate to the location where you want to save the Theme, then click the **Save** button.
- Click **OK** in the confirmation box.

## Dark Mode

The 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 fewer distractions.

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

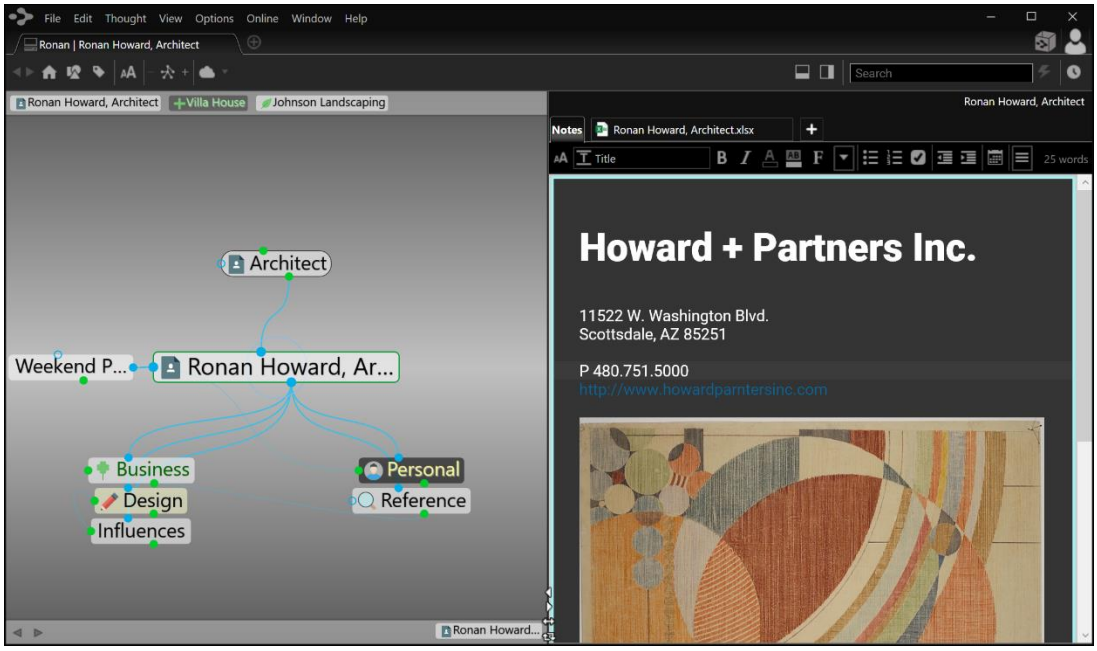



**Figure 80. TheBrain in Dark Mode**

- You may want to modify your Brain Theme to compliment the darker interface and tones
- On macOS, the Dark Mode setting will follow your OS automatically.

## Setting Other Preferences

TheBrain's **Preferences** dialog box is where you'll find many of the settings for adjusting how your Brain works, both mechanically and visually. Preference settings affect how TheBrain works globally—no matter which Brain is open when you make your choices.

**To open the Preferences dialog box:**

- Click the **Options** menu, then click the **Preferences** command (on macOS, the **Preferences** command is located in the **TheBrain** menu)

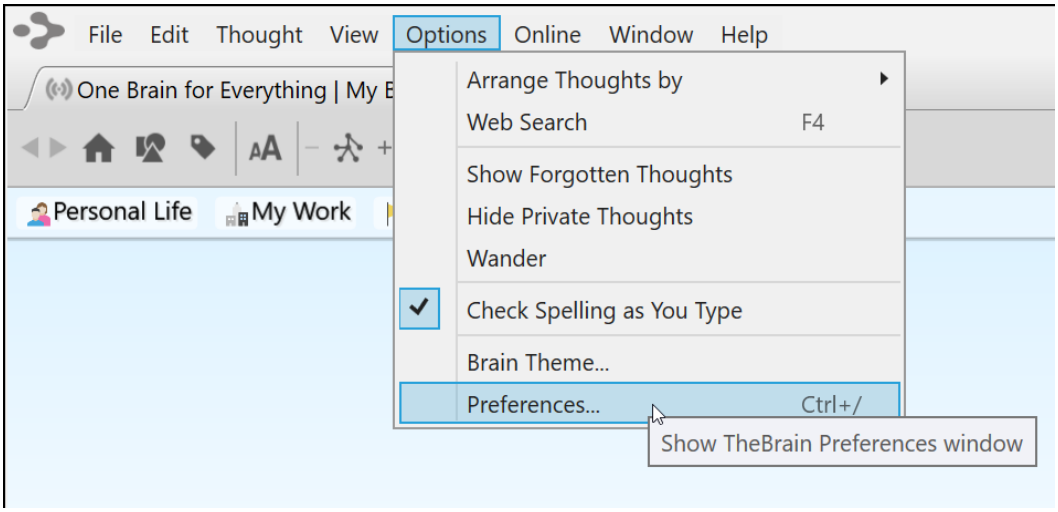



**Figure 81. Accessing Preferences**

TheBrain **Preferences** are organized into these categories:

- Look & Feel
- Behavior
- Notes Editor
- System
- Keyboard

## Look & Feel Preferences

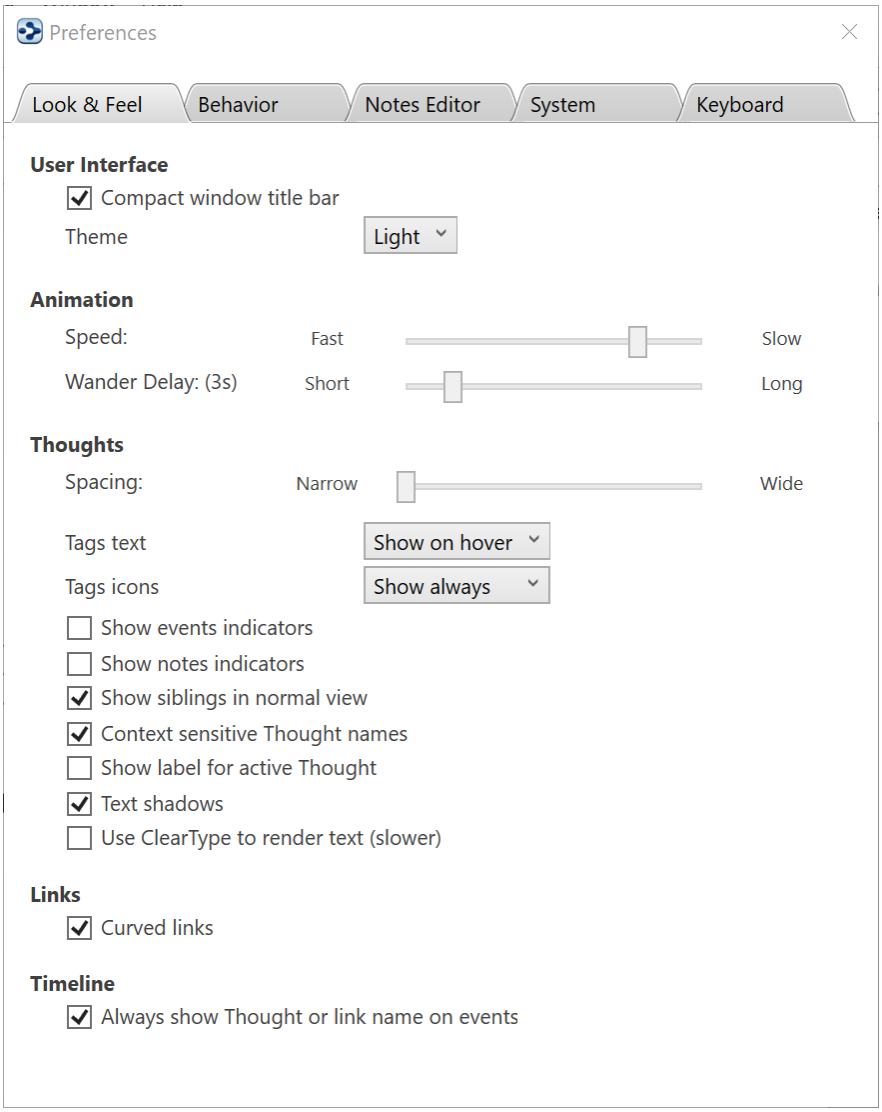



**Figure 82. Look & Feel Preferences**

### Animation

| Preference | Description |
|---|---|
| **Compact Window Title Bar** | Moves the File, Edit, Thought, View, etc. menu items up into the frame of the app. |
| **Theme** | Switch between Light and Dark Mode. |
| **Speed** | Drag the slider right to reduce or left to increase the speed with which a Thought becomes active when you click it in the Plex. |

| Preference | Description |
|---|---|
| **Wander Delay** | Wandering is an option to step randomly through TheBrain, to let you see Thought associations. Drag the slider to specify the amount of delay (in seconds) between Thought activations. The delay is shortest by default. |

### Thoughts

| Preference | Description |
|---|---|
| **Spacing** | Drag the slider to decrease or increase space between Thoughts. The wider the spacing, the larger and more spaced out the Thoughts will be. |
| **Tags text** | You can choose to never show, always show, or only show Tag text on hover (mouseover). |
| **Tags icons** | You can choose to never show, always show, or only show Tag icons on hover (mouseover). |
| **Show events indicators** | Event icons will appear in the bottom-right area of thoughts that include events. This preference is off by default. |
| **Show notes indicators** | Note icons will appear in the bottom-right area of thoughts that include Notes. This preference is off by default. |
| **Show siblings in normal view** | This preference is on by default. |
| **Context sensitive Thought names** | Context sensitive Thought names are explained on page 91. This preference is on by default. |
| **Show label for active Thought** | This preference is off by default. |
| **Text shadows** | This preference is on by default. |
| **Use ClearType to render text (slower)** | Applies a crisper display of thought names, but may require more system resources. |

### Links

| Preference | Description |
|---|---|
| **Curved Lines** | When selected, links will be curved lines and when not selected, links will be straight lines. This preference is on by default. |

### Timeline

| Preference | Description |
|---|---|
| **Always show Thought or link name on events** | This preference is on by default. |

## Behavior Preferences

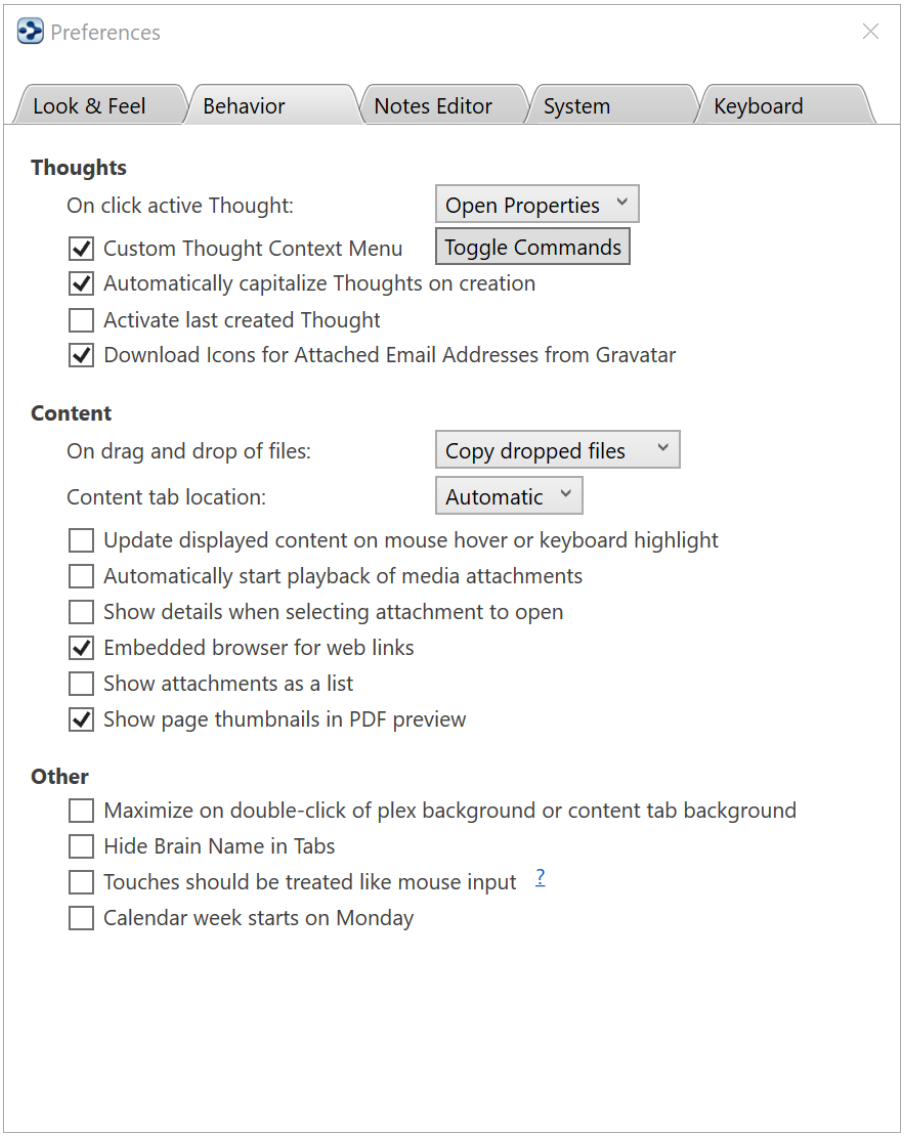



**Figure 83. Behavior Preferences**

### Thoughts

| Preference | Description |
|---|---|
| **On click active Thought** | By default, the Thought's properties will display when the active Thought is clicked. The other option is to do nothing. |
| **Custom Thought Context Menu** | Click on Toggle Commands and uncheck options that you would like to have hidden. |
| **Automatically capitalize Thoughts on creation** | The first letter of the name of the Thought will be automatically capitalized. This preference is on by default. |
| **Activate last created Thought** | A Thought will become the active Thought as soon as it's created. This preference is off by default. |
| **Download Icons for Attached Email Addresses from Gravatar** | This preference is on by default. |

### Content

| Preference | Description |
|---|---|
| **On drag and drop of files** | By default, files will be copied when dragged and dropped. The other options are that they will be either moved or linked. |
| **Content tab location** | The Content tab location is automatic by default. The other options are to the left and at the top. This applies to the tabs in the Content Area, not the Content Area itself. |
| **Update displayed content on hover** | This preference is off by default. |
| **Show details when selecting attachment to open** | This preference is off by default. |
| **Embedded browser for web links** | Web content will appear in TheBrain's built-in browser. This preference is on by default. |
| **Show attachments as a list** | Attachments will show in the same area instead of on separate tabs within the Content Area. This preference is off by default. |
| **Show page thumbnails in PDF preview** | When checked, a small list of thumbnails for each page in a PDF preview will be displayed in the content area for easy navigation. |

### Other

| Preference | Description |
|---|---|
| **Maximize on double-click of Plex background or content tab background** | Double-clicking either the Plex or Content Area background will maximize that part of the Brain and the other part will be hidden. This preference is off by default. |
| **Hide Brain Name in Tabs** | Removes the Brain name from appearing in the tabbed interface. |
| **Touches should be treated like mouse input** | The way the plex interprets touch events can be altered using the preference. More information on this setting is available at https://www.thebrain.com/docs/touches-info |
| **Calendar week starts on Monday** | This preference is off by default and the Calendar week starts on Sunday. |

## Notes Editor

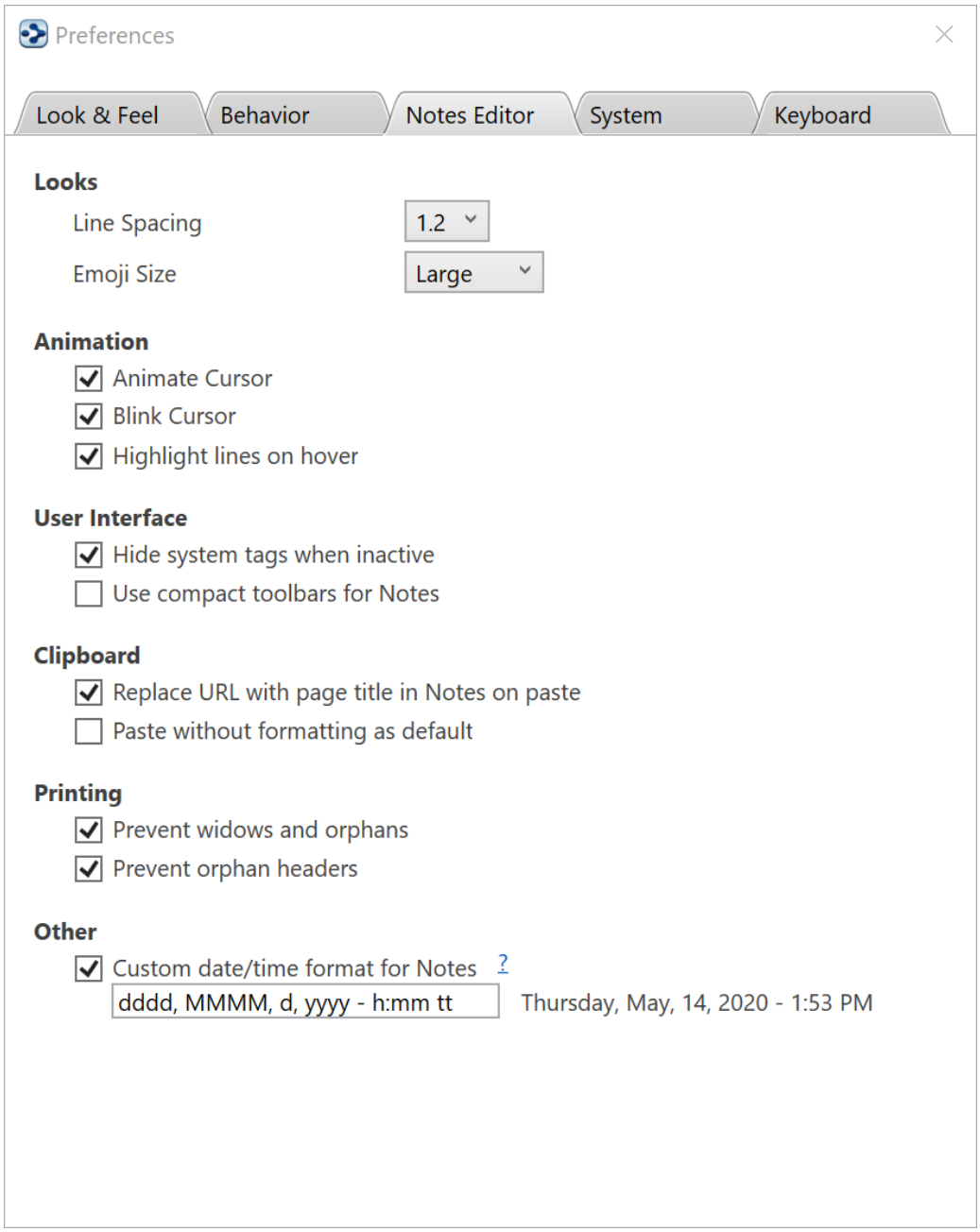



**Figure 84. System Preferences**

### Looks

| Preference | Description |
|---|---|
| **Line Spacing** | Set notes line spacing |
| **Emoji Size** | Set emoji size to Small, Medium or Large |

### Animation

| Preference | Description |
|---|---|
| **Animate Cursor** | Cursor will visibly animate when clicking to different locations in Notes |
| **Blink Cursor** | Cursor in Notes will blink to indicate it's location |
| **Highlight lines on hover** | Hover over any line in the notes and it will be highlighted |

### User Interface

| Preference | Description |
|---|---|
| **Hide system tags when inactive** | Markdown tags will appear when Notes have focus, but will not display when the Plex has focus |
| **Use compact toolbars for Notes** | Some tools will grouped into dropdown lists. |

### Clipboard

| Preference | Description |
|---|---|
| **Replace URL with page title in Notes on paste** | This preference is on by default. |
| **Paste without formatting as default** | When checked, pasting into the notes area will Paste Without Formatting. No need to press Ctrl+Shift+V or Right Click to access this option via a context menu. |

### Printing

| Preference | Description |
|---|---|
| **Prevent widows and orphans** | This preference is on by default. This feature is used when printing. The settings will either move an entire paragraph up or down to the next page as appropriate. |
| **Prevent orphan headers** | This preference is on by default. |

### Other

| Preference | Description |
|---|---|
| **Custom date/time format for Notes** | When this preference is selected, you can enter a different syntax for how dates and times are displayed. The default date and time format is: yyyy/MM/dd HH:mm Setting options are listed at https://www.thebrain.com/docs/date-time-format-info |

## System Preferences

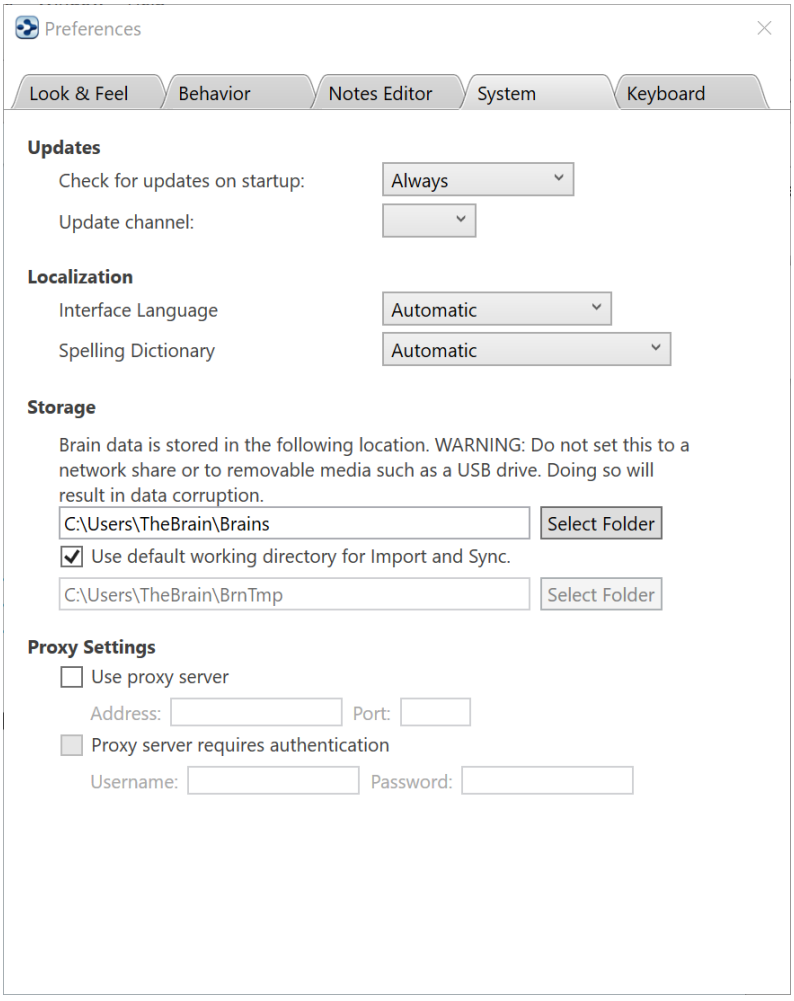



**Figure 85. System Preferences**

### Updates

| Preference | Description |
|---|---|
| **Check for updates on startup** | Notification of updates on startup. Always, Only free updates or Never. |
| **Update Channel** | This preference affects which kind of updates you'll see as available when you click the **Check for Update** command on TheBrain's **Help** menu. The default is Stable and the other choices are Beta and Alpha. |

### Localization

| Preference | Description |
|---|---|
| **Interface Language** | The default is Automatic. Languages are currently available for German, Russian, Chinese, Polish, and Portuguese. If you would like to contribute to the translation of a new language, please contact Support@TheBrain.com for details. |
| **Spelling Dictionary** | The default is Automatic and there are many other languages to choose from in the drop-down list. After you select another language, you'll be prompted to exit TheBrain and restart so that your change can take effect. |

### Storage

| Preference | Description |
|---|---|
| **Storage** | The location of your Brain data. |

### Proxy Settings

| Preference | Description |
|---|---|
| **Use proxy server and proxy server requires authentication** | If you are unable to synchronize your Brain with TheBrain Cloud due to a proxy server or restricted ports on your network, the Proxy settings can be used to customize the synchronization process. Check with your network administrator for the appropriate information for these fields. By default, the Use proxy server preference is off. |

## Keyboard Preferences

Most Brain commands can be accessed by keyboard commands, which you can customize based on your preferences. You can even export your settings to share them with others or to transfer them from one computer to another.

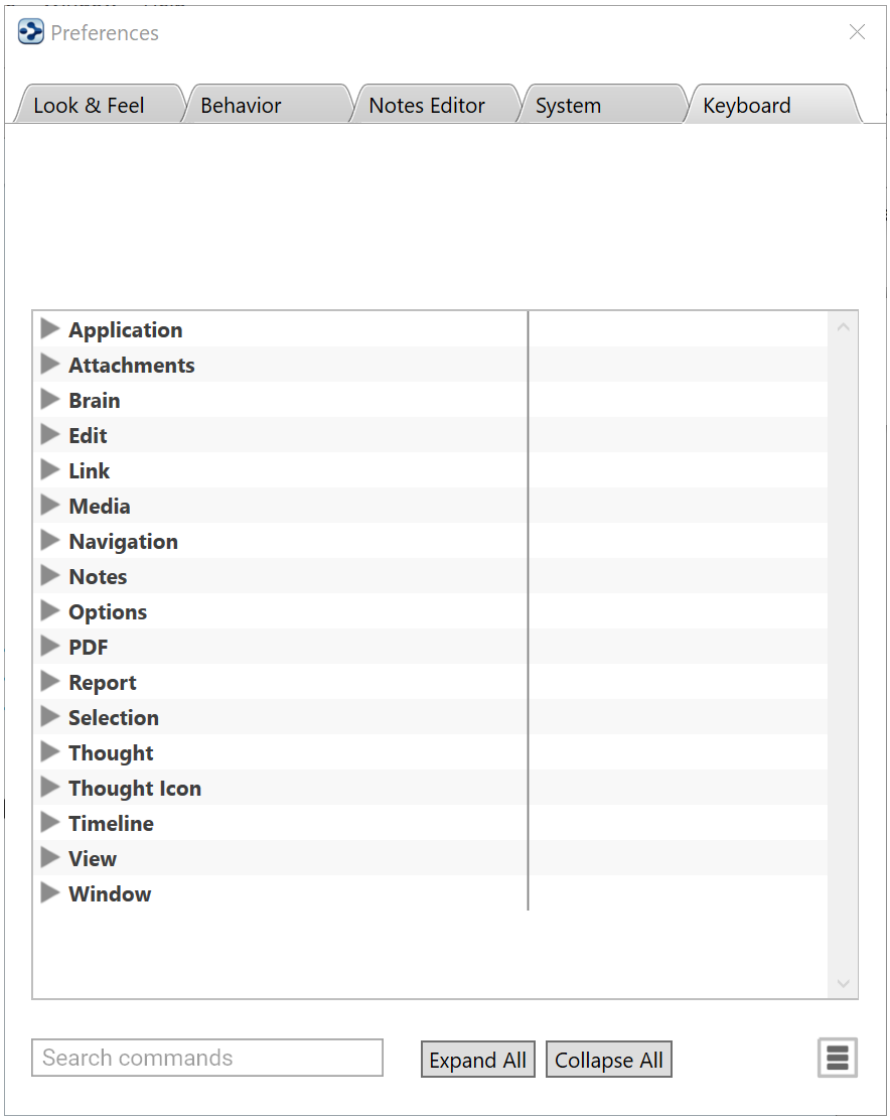
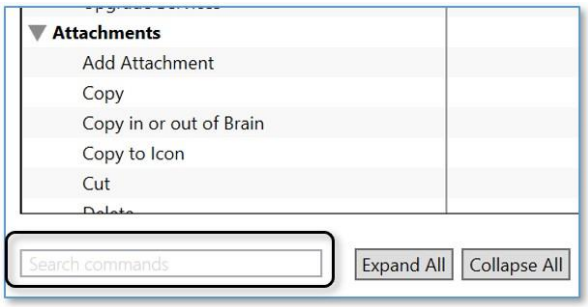
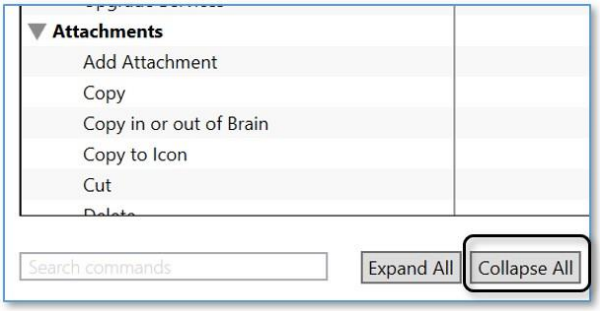
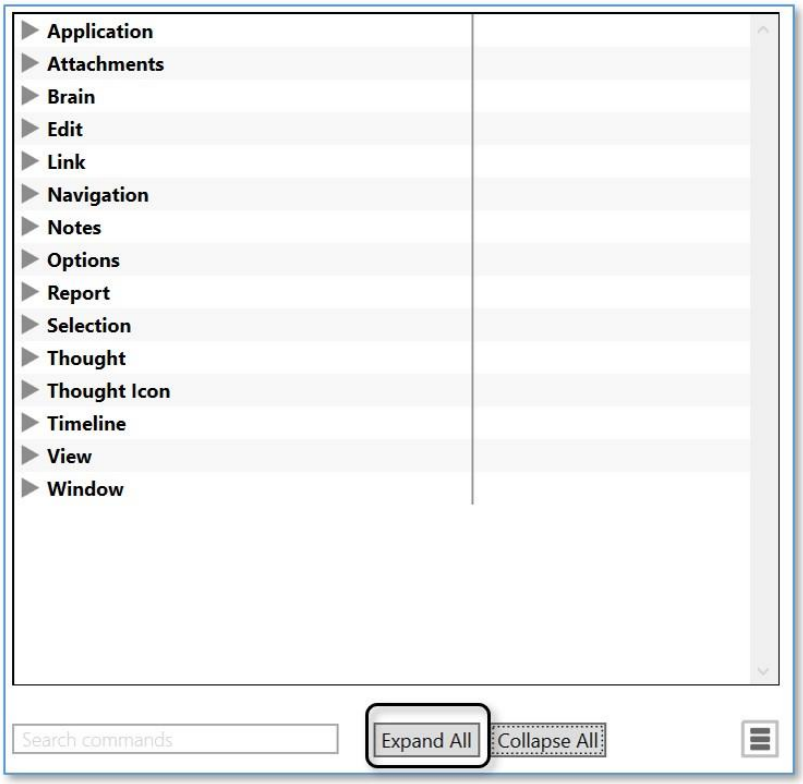


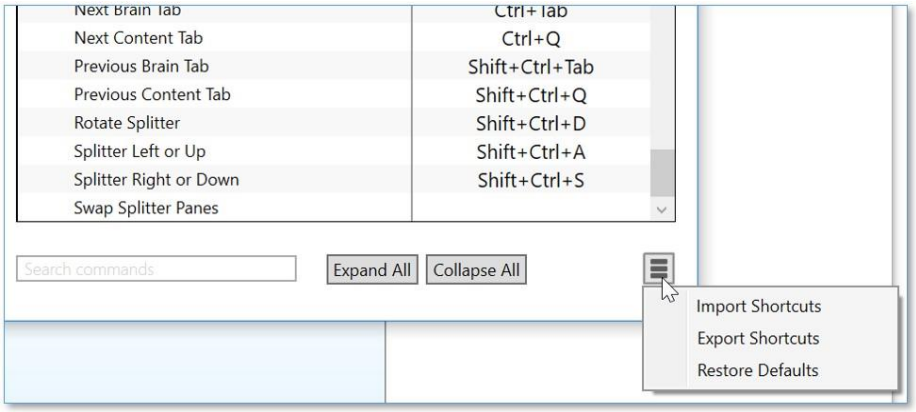

**Figure 86. Keyboard Preferences**

## Using the Keyboard Preferences Tab

| To do this … | Do this … |
|---|---|
| **Find a command quickly** | Begin typing the command in the Search commands field in the bottom-left corner of the **Keyboard** tab of the **Preferences** window.<br>  <br>As you type, the list will shorten to match what you've typed. When you see the command you're looking for, note its shortcut or click it to define a new shortcut. |
| **Collapse the list to see only major headings** | Click the **Collapse All** button.<br>  <br>You can also collapse an individual heading, for example "Application," to collapse or expand just that section. |
| **Restore the full list** | Click the **Expand All** button. |




| To do this … | Do this … |
|---|---|
| **Import shortcuts** | Click the menu in the bottom-right corner of the **Keyboard** tab, then click the **Import Shortcuts** command. |
| **Export shortcuts** | Click the menu in the bottom-right corner of the **Keyboard** tab, click the **Export Shortcuts** command, select a location for the file, then click the **OK** button. The file will be named "KeyboardShortcuts.txt." |
| **Restore default shortcuts** | Click the menu in the bottom-right corner of the **Keyboard** tab, then click the **Restore Defaults** command. |



**To define a new shortcut:**

1. In the left column, click the command for which you want to create a shortcut. The row containing the command will be highlighted and an instruction will appear under the **Preferences** tabs.

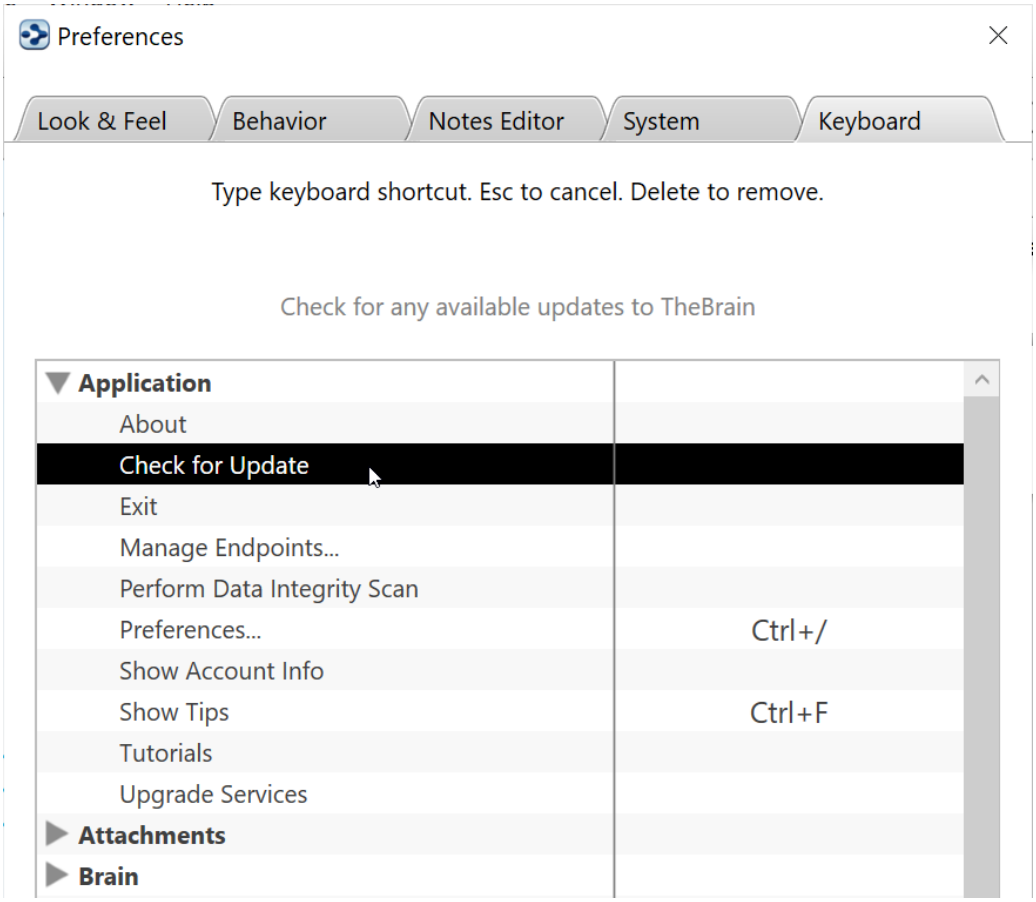



**Figure 87. Creating a New Shortcut**

2. Click on the command of your choice in the left column, then press the function key or keyboard combination of your choice. For example, you might choose to assign the "Check for Update" command to **Ctrl**+**Shift**+**U**.

You can't assign keys that are already used for common operations (such as **Ctrl**-**C**) nor can you use letter or number keys by themselves. The **Alt** key can be used as a standalone modifier

Your new shortcut will display in the list. You can delete the shortcut by pressing the **Delete** key while the command is highlighted.

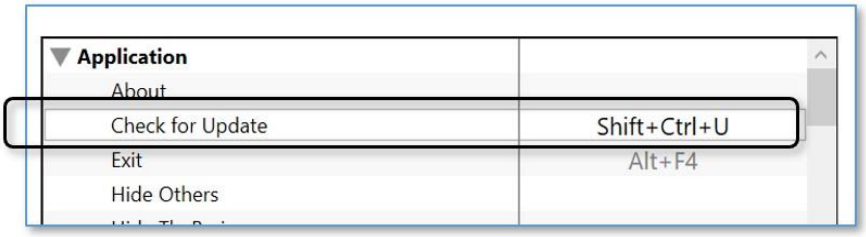



**Figure 88. The New Shortcut in the List**

If the keyboard shortcut you selected is already in use for another action, you will have the option to "steal" the shortcut for the current selection, or cancel the request and select a different keyboard combination.

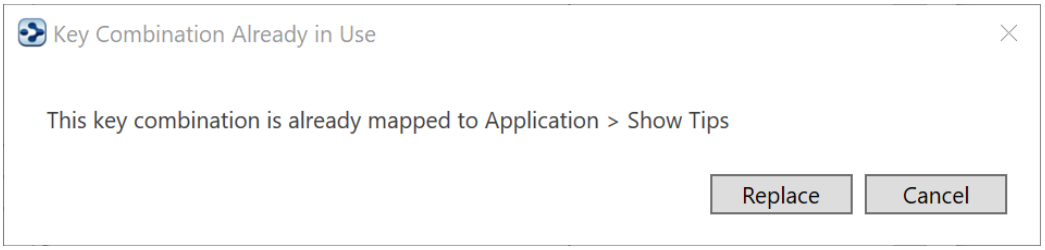



**Figure 89. Replacing an Existing Shortcut**

### Default Shortcuts for Windows

| Application Commands | Shortcut |
|---|---|
| Exit | **Alt**+**F4** |
| Preferences | **Ctrl**+, |

| Edit Commands | Shortcut |
|---|---|
| Copy | **Ctrl**+C |
| Copy as Text | **Shift**+**Ctrl**+C |
| Cut | **Ctrl**+X |
| Paste | **Ctrl**+V |
| Paste without Formatting | **Shift**+**Ctrl**+V |
| Redo | **Ctrl**+Y |
| Select All | **Ctrl**+A |
| Undo | **Ctrl**+Z |

| Navigation Commands | Shortcut |
|---|---|
| Activate Tag | **Ctrl**+G |
| Activate Type | **Ctrl**+E |

| Navigation Commands | Shortcut |
|---|---|
| Backward | **Alt**+Left |
| Expand/Collapse Current Thought | **Space** |
| Forward | **Alt**+Right |
| Navigate Down | **Down** |
| Navigate Enter | **Enter** |
| Navigate Escape | **Esc** |
| Navigate Left | **Left** |
| Navigate Right | **Right** |
| Navigate to Pin 1 | **Ctrl**+1 |
| Navigate to Pin 2 | **Ctrl**+2 |
| Navigate to Pin 3 | **Ctrl**+3 |
| Navigate to Pin 4 | **Ctrl**+4 |
| Navigate to Pin 5 | **Ctrl**+5 |
| Navigate to Pin 6 | **Ctrl**+6 |
| Navigate to Pin 7 | **Ctrl**+7 |
| Navigate to Pin 8 | **Ctrl**+8 |
| Navigate Up | **Up** |

| Notes Commands | Shortcut |
|---|---|
| Bold | **Ctrl**+B |
| Export PDF… | **Alt**+**Ctrl**+P |
| Find & Replace | **Ctrl**+F |
| Indent | **Tab** |
| Insert Date/Time | **Ctrl**+D |
| Italic | **Ctrl**+I |
| Open in Browser | **Alt**+**Ctrl**+O |
| Outdent | **Shift**+**Tab** |
| Print | **Ctrl**+P |
| Toggle Underline Formatting | **Ctrl**+U |

| Options Commands | Shortcut |
|---|---|
| Web Search | **F4** |

| Thought Commands | Shortcut |
|---|---|
| Create Child | **F6** |

| Thought Commands | Shortcut |
|---|---|
| Create Jump | **F8** |
| Create Parent | **F7** |
| Forget | **Ctrl**+**Del** |
| Open Attachment | **Ctrl**+O |
| Open Folder | **Shift**+**Ctrl**+F |
| Show Thought Properties | **Ctrl**+**Enter** |

| Thought Icon Commands | Shortcut |
|---|---|
| Select Stock Icon | **Alt**+**Ctrl**+I |

| View Commands | Shortcut |
|---|---|
| Collapse All | **Ctrl**+9 |
| Expand All | **Ctrl**+0 |
| Mind Map | **Shift**+**Ctrl**+3 |
| Normal | **Shift**+**Ctrl**+1 |
| Outline | **Shift**+**Ctrl**+2 |
| Zoom In | **Ctrl**+= |
| Zoom Out | **Ctrl**+- |

| Window Commands | Shortcut |
|---|---|
| Close Tab | **Ctrl**+W |
| Keyboard Focus to Notes | **Ctrl**+N |
| Keyboard Focus to Search | **Ctrl**+S |
| New Tab | **Ctrl**+T |
| New Window | **Shift**+**Ctrl**+N |
| Next Brain Tab | **Ctrl**+**Tab** |
| Next Content Tab | **Ctrl**+Q |
| Previous Brain Tab | **Shift**+**Ctrl**+**Tab** |
| Previous Content Tab | **Shift**+**Ctrl**+Q |
| Rotate Splitter | **Shift**+**Ctrl**+D |
| Splitter Left or Up | **Shift**+**Ctrl**+A |
| Splitter Right or Down | **Shift**+**Ctrl**+S |

### Default Shortcuts for macOS

| | |
|---|---|
| Create Child | **Alt**+**Command**+Down |
| Create Parent | **Alt**+**Command**+Up |
| Create Jump | **Alt**+**Command**+Left |
| Rename | **Alt**+**Enter** |
| Focus on Plex | **Cmd**+S |
| Focus on Notes | **Cmd**+N |
| Search Web | **Cmd**+E |

# Creating Thoughts

## Creating a Single Thought

There are many ways to create a Thought, but most start with the same step—choosing the Thought with which the new Thought will have a relationship. You will use the chosen Thought as a starting place when creating the new Thought.

Generally speaking, you'll create child Thoughts more often than parents or jumps. There are certainly exceptions, but usually, using a "top-down" approach is helpful if you are just getting started: Create children (and jumps, as appropriate) and let parents happen naturally.

Once you have activated the Thought that will have a relationship with your new Thought, use any of these techniques to begin creating a new Thought:

- Drag from the Thought's parent, child, or jump gate

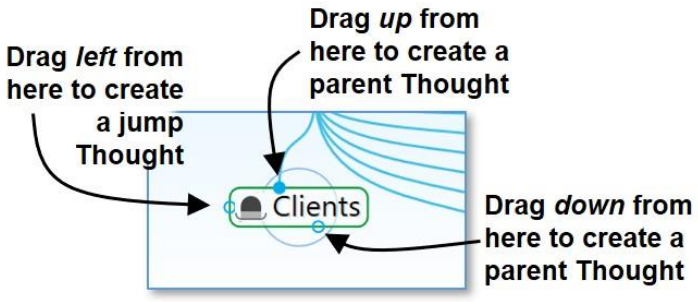
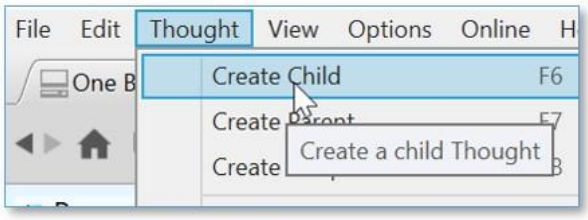
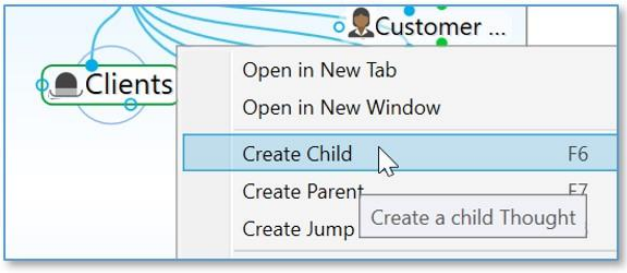



**Figure 90. Gates to Drag for Creating Thoughts**

- Or click the **Thought** menu, then click the **Create Child**, **Create Parent**, or **Create Jump** command




- Or, right-click the Thought, then click the **Create Child**, **Create Parent**, or **Create Jump** command




- Or use a keyboard shortcut:

  On Windows, press the **F6** key (for a child Thought), **F7** (for a parent Thought), or **F8** (for a jump Thought)

  On macOS, press the **Option+Cmd+Down Arrow** (for a child Thought), **Option+Cmd+Up Arrow** (for a parent Thought), or **Option+Cmd+Left Arrow** (for a jump Thought)

No matter which of the above methods you use to begin creating your new Thought, the next thing you'll see is the **Thought Creation** dialog box with the cursor blinking in the field for typing in the name of your new Thought.

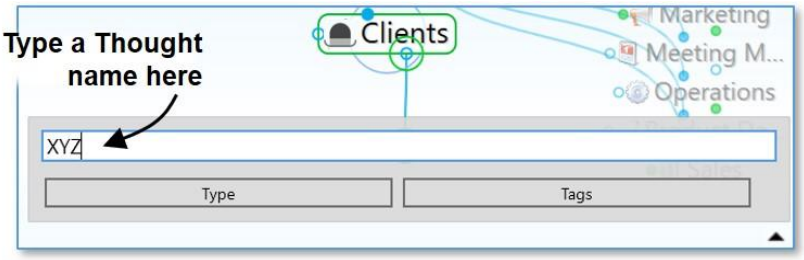



**Figure 91. Thought Creation Dialog Box**

1. Type the name of your new Thought in the field provided.
2. Press the **Enter** key or click in a blank area of the Plex to save your new Thought (or press the **Esc** key to cancel the process and close the box).

---

**Automatic initial-capitalization:** If you type a Thought name using all lowercase letters, the first letters of words will be capitalized for you automatically. TheBrain uses "smart rules" to determine which words should be lowercase (such as "a," "and," and "of"). For example, if you've typed "visit the statue of liberty" the Thought name will automatically become "Visit the Statue of Liberty." This feature is active, by default, but you can turn it off in the **UI** tab of the **Preferences** dialog box.

If Spellcheck is turned on in your Notes Toolbar, thought names will also be spellchecked in the **Thought Creation** dialog box as well as in the **Thought Properties** dialog box.

---

## Creating Multiple Thoughts at Once

TheBrain offers a timesaver (affectionately known as the “semi-colon trick”) for creating more than one Thought at a time.

- Type a **semicolon** (;) to separate multiple Thought names in the **Thought Creation** dialog box

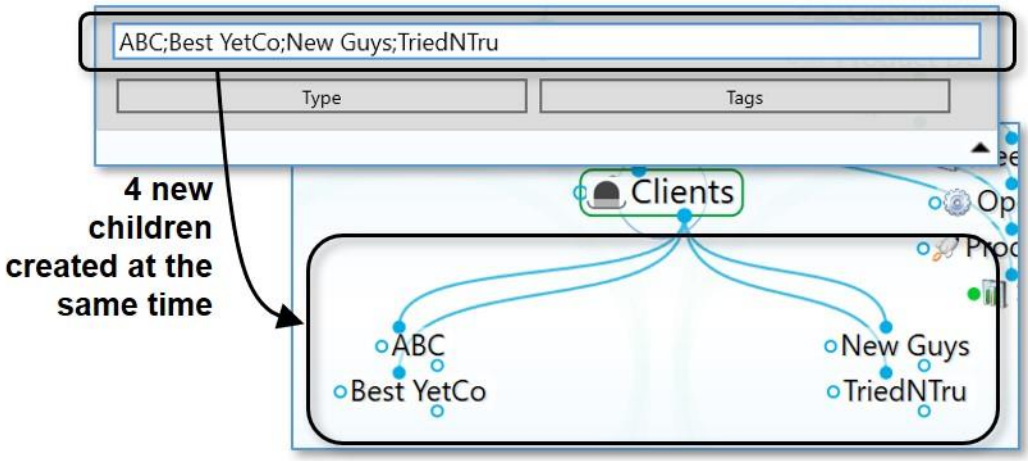



**Figure 92. Creating Multiple Thoughts**

## Creating Context-Sensitive Thought Names Using Commas

It’s always good to be specific with your Thought names. TheBrain has some time savers to help you if you have repetitive information that needs to be added to your Brain. For example, say you have Thoughts for each of your clients, each of whom has a billing department. You’d like a child Thought named “Billing Info” for each of your client Thoughts. However, you may not want to have identical Thought names because when you see these Thoughts later you won’t be able to tell them apart without looking at their parents.

To remedy this potential dilemma, when you type the name of the new Thought, start or end the name with a comma. The parent Thought name will be added automatically. When this Thought is displayed, its name will vary depending on the context in which it’s viewed. If the client Thought is active, the client’s name will be hidden and it will appear as just “Billing Info.” But when you activate this Thought, the full name along with the client’s name will appear.

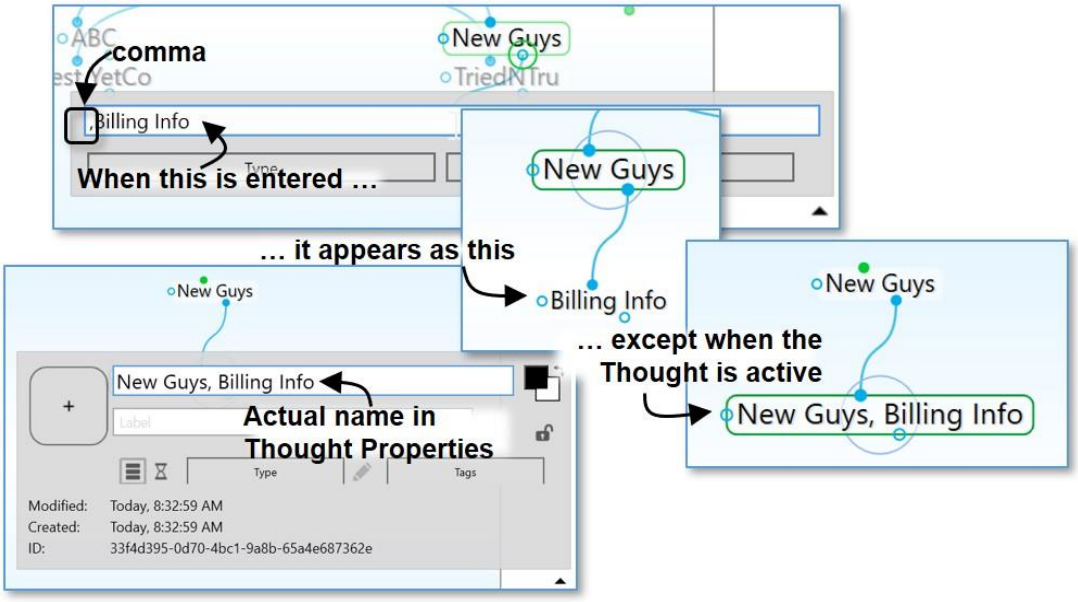



**Figure 93. Sub-Category Thoughts**

The Thought will display its full name when it is active. When its parent Thought is active, you'll see only the portion of the name that does not repeat the parent's name. Ensuring that each of your Thoughts has a unique name will help you find and identify them more easily.

**Tip:** The part of the Thought's name that is hidden is context sensitive. Say for example that you wanted to have a single place to see the billing information for all your clients. You might create a Thought called "Billing Info" and then link to the billing information Thoughts for each of your clients, such as "New Guys, Billing Info." If you do this, when Billing Info is active "New Guys, Billing Info" will appear as just "New Guys," whereas when New Guys is active, that same Thought will appear as Billing Info. Try it—you'll see how this can be very useful. When thoughts are displayed in alphabetical order, the current view of the context sensitive name will determine its position.

Commas can be added at the beginning of a Thought name or at the end. If the comma is added during Thought Name creation, the Parent Thought Name will automatically be added. If you are adding a comma for context sensitive naming after a Thought has already been created, you will need to add/type the Parent Thought Name manually.

## Using Parentheses to Assist with Thought Sorting

Adding parentheses around the first part of thought name will skip that part for sorting purposes (unless there is a tie) when thoughts are grouped alphabetically.

- To enable this feature, a thought name must have both an open parenthesis as the first character and a close parenthesis later in the thought name. Whitespace will be trimmed, and there must be some thought name left after that. (Later parenthesis will be ignored.)

- Note that this is mutually exclusive to Hidden Ordering Prefixes starting with a dot. You can only have one or the other.

Example: if your Thoughts are grouped alphabetically, the following group of thoughts named:

**(The) Beatles**
**Belle & Sebastian**
**(The) Bee Gees**
**(The) Beach Boys**

would display as:

**The Beach Boys**
**The Beatles**
**The Bee Gees**
**Belle & Sebastian**

## Creating Orphan Thoughts

When you create a Thought in your Brain, you usually first decide what relationship it will have with an existing Thought, but sometimes you just want to create something without making a relationship.

To create a Thought independently of other Thoughts, type into the Search box and click the lightning bolt icon. This works well especially when you are looking for something and discover you haven't yet put it into your Brain. When no search results appear, you can just click the icon to add it to your Brain without having to retype it.

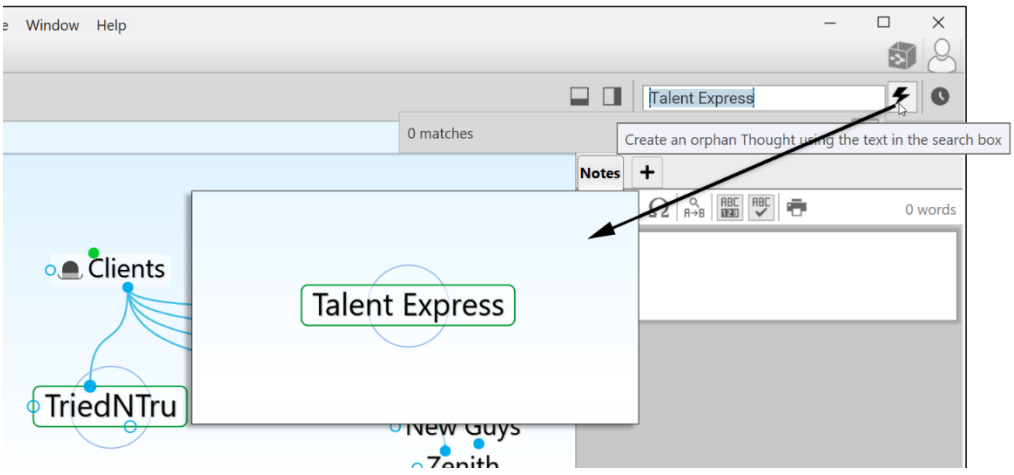



**Figure 94. Creating an Orphan Thought**

## Changing the Display Order of Thoughts

You can use TheBrain's hidden ordering system to change the default alphabetical ordering of Thoughts in the Plex to any order you prefer. To do this, type a period and a number as the first characters of any Thought name. These characters will not be displayed in the Plex. For example, try creating the following group of child Thoughts in one area:

- .01 Zebra
- .02 Walrus
- .03 Aardvark

The Thoughts will appear in the order of Zebra, Walrus, Aardvark (without the periods or numbers), rather than alphabetically. You can always delete or revise the numbers in the **Thought Properties** dialog box.

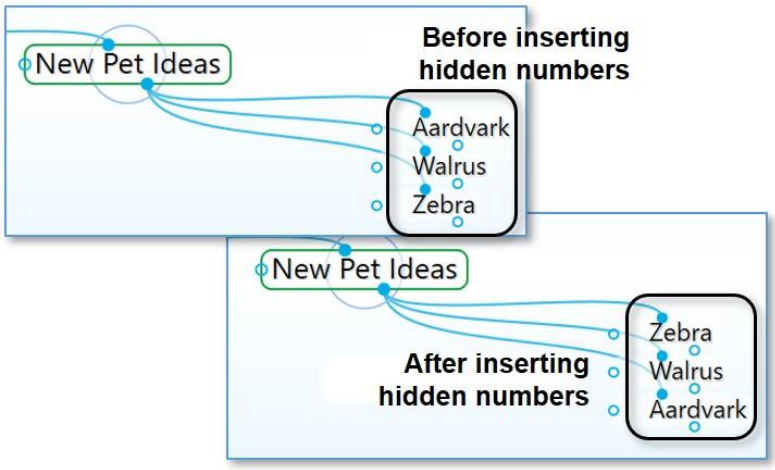


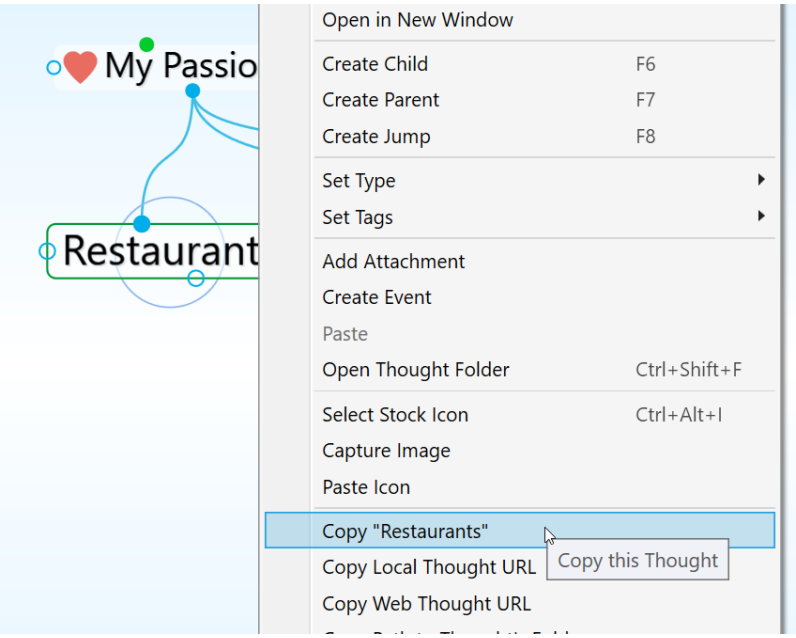

**Figure 95. Changing Thought Order**

## Copying Thoughts Within and Between Brains

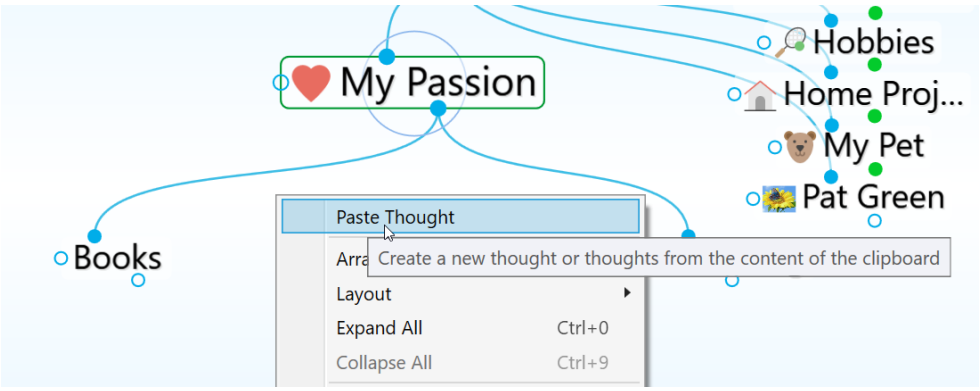
Thoughts, including all of their notes, properties, events, and attachments, can be copied and pasted between Brains or duplicated within a Brain. When Thoughts are copied, associated Thought types and link types are automatically copied as well.

**To copy a Thought within the same Brain:**

1. Right-click the Thought to be copied and then click the **Copy "*name of Thought*"** command on the context menu.




2. Activate the Thought that will be the parent of the newly copied Thought.
3. Right-click within any blank area of the plex and click **Paste Thoughts** on the context menu.




4. The copied Thought will automatically be linked as a child of the active Thought and it will also retain all of its original relationships.

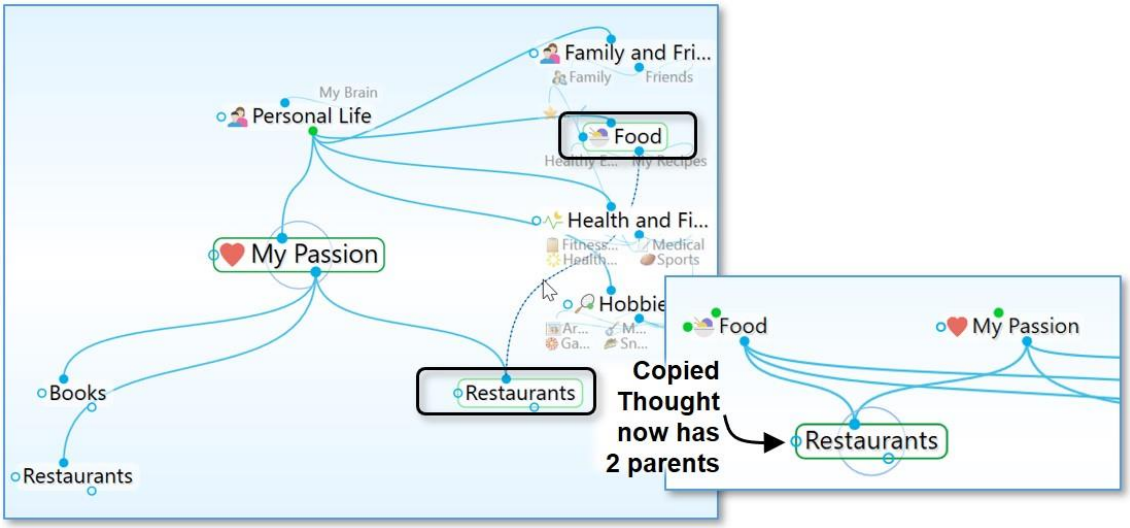



**Figure 96. Copied Thought with Two Parents**

### To create a duplicate of a Thought:

If you just want to make a duplicate of a single Thought without retaining any of its links, you can use the **Duplicate Thought** command.

1. Right-click the Thought to be duplicated and then click the **Duplicate Thought** command on the context menu.

2. The duplicated Thought will appear as a child of the original, as shown in the figure below.

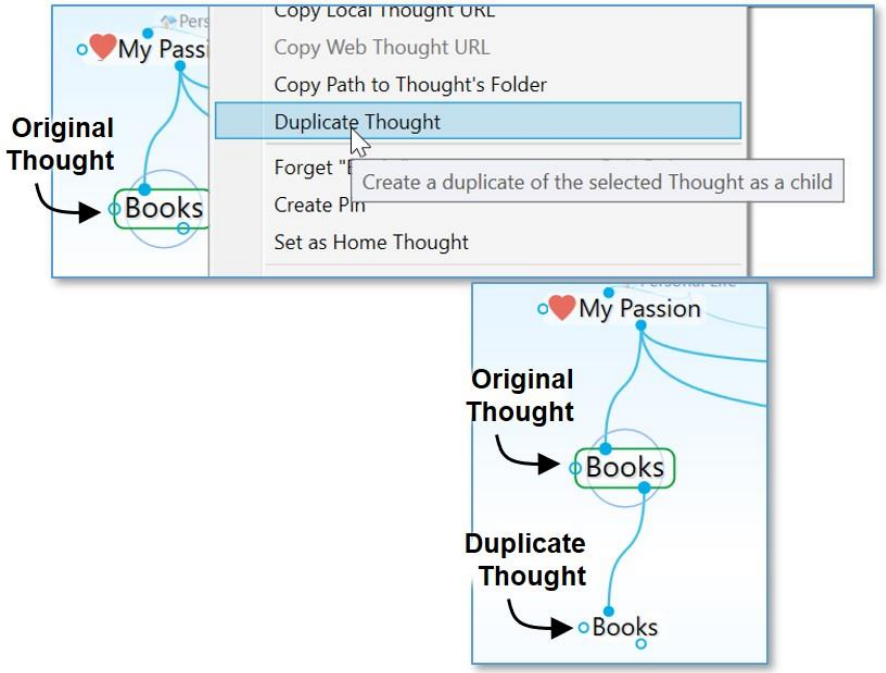



**Figure 97. Duplicating a Thought**

**To copy a Thought to another Brain:**

1. Right-click the Thought to be copied and then click the **Copy "*Thought name*"** command on the context menu (or activate the Thought, click the **Edit** menu, and then click the **Copy** command).
2. Open the Brain into which you want to copy the Thought.
3. Right-click on the background of the Plex and then click the **Paste Thought** command on the context menu (or click the **Edit** menu and then click the **Paste Thought** command).
4. The Thought will be pasted into the Brain and linked as a child of the active Thought. It will include any attachments, Thought Types, Notes, or other attributes it had in the original Brain.

If you have selected multiple Thoughts, they can all be copied at once using the same technique. Right-click anyplace within the Selection box to open the context menu. See Selecting Multiple Thoughts beginning on page 98 for complete instructions about selecting multiple Thoughts.

## Undoing and Redoing Actions

Changing your mind about your actions is easy. You can undo up to 100 actions during your current session. Actions that have been undone can also be re-executed using the **Redo** command.

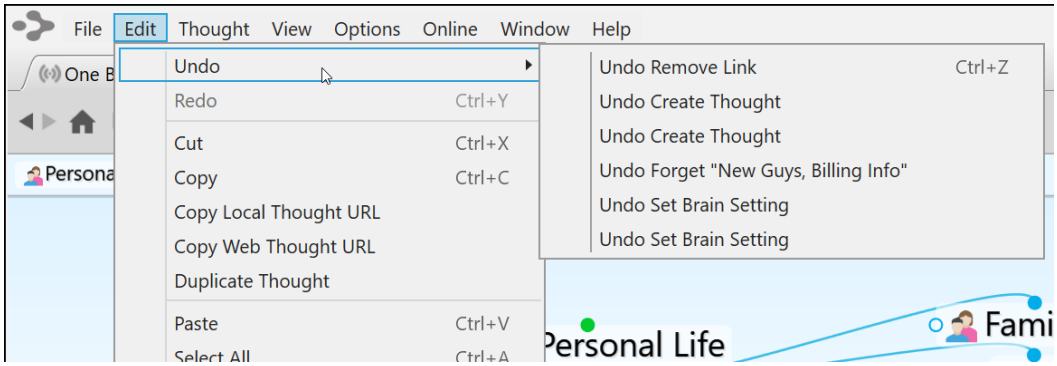



**Figure 98. Undo and Redo Commands**

**To undo an action:**

1. Click the **Edit** menu and then click the **Undo** command. The list on the secondary menu displays your most recent action first.
2. To undo your most recent action, click the first item in the secondary menu. To undo multiple actions, select the oldest action to be undone from the list. All actions above that action will also be undone.

**To redo an action you have undone:**

1. Click the **Edit** menu and then click the **Redo** command. If there are multiple items that can be redone, a secondary menu will be displayed.

2. Click the action of your choice. As in the list of actions that can be undone, the list is in most-recent-action-first order. All actions above the item you click will also be undone.

The Undo and Redo lists are cleared when you sync your Brain (including an auto sync) and when your Brain is closed.

# Editing Thoughts and Links

## Renaming Thoughts

You can easily rename any Thought in its **Thought Properties** dialog box.

- Click the Thought to make it active, then click it again. You may also click the **Show Thought Properties** command in the **Thought** menu or **Alt**-click a non-active **Thought**. In the **Thought Properties** dialog box, make any edits you want, then press the **Enter** key or click in the Plex.

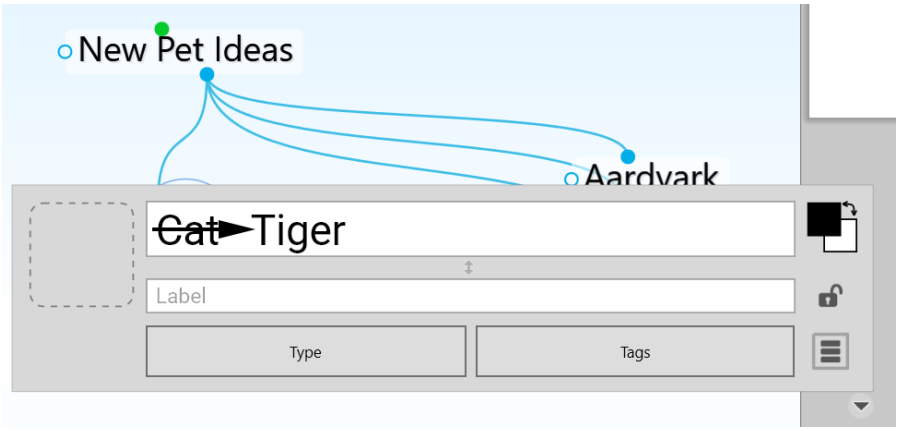



**Figure 99. Renaming a Thought**

## Selecting Multiple Thoughts

You can select multiple Thoughts in three ways:

- Hold down the **Ctrl** key as you click each Thought you want to select, or
- Hold down the **Ctrl** key as you drag to form a box around the Thoughts, or
- Hold down the **Ctrl** key as you click a gate to select all the Thoughts connected to that gate

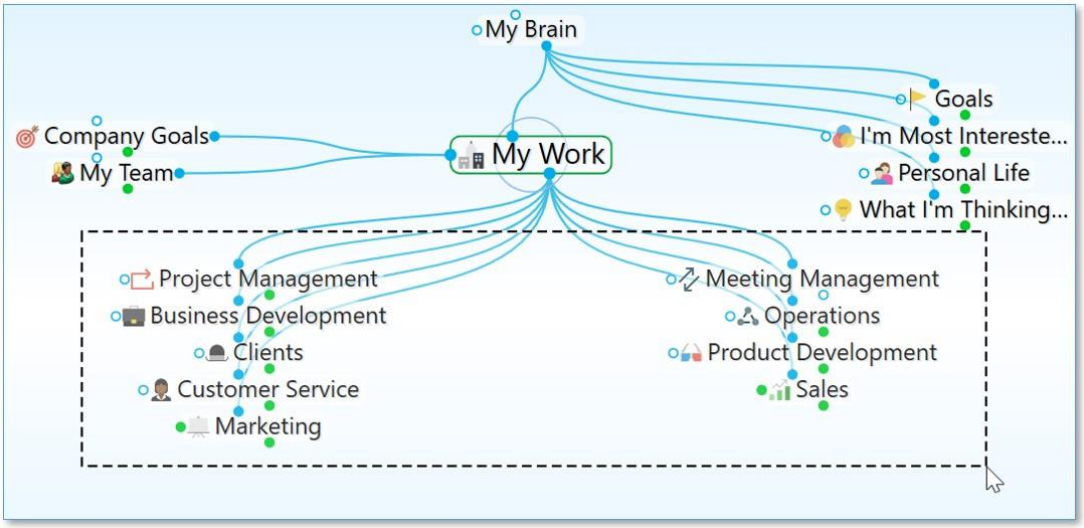



**Figure 100. Selecting Multiple Thoughts by Ctrl-Dragging**

Selected Thoughts are then added to TheBrain's Selection box for making mass edits on large groups of Thoughts at one time.

After the multiple Thoughts are selected, you can apply actions—link, unlink, forget, set Thought type, and other actions you would apply to an individual Thought—to the selected Thoughts en masse. When multiple Thoughts are selected they are listed in a Selection box on the left side of the Plex and they are highlighted in the Plex itself.

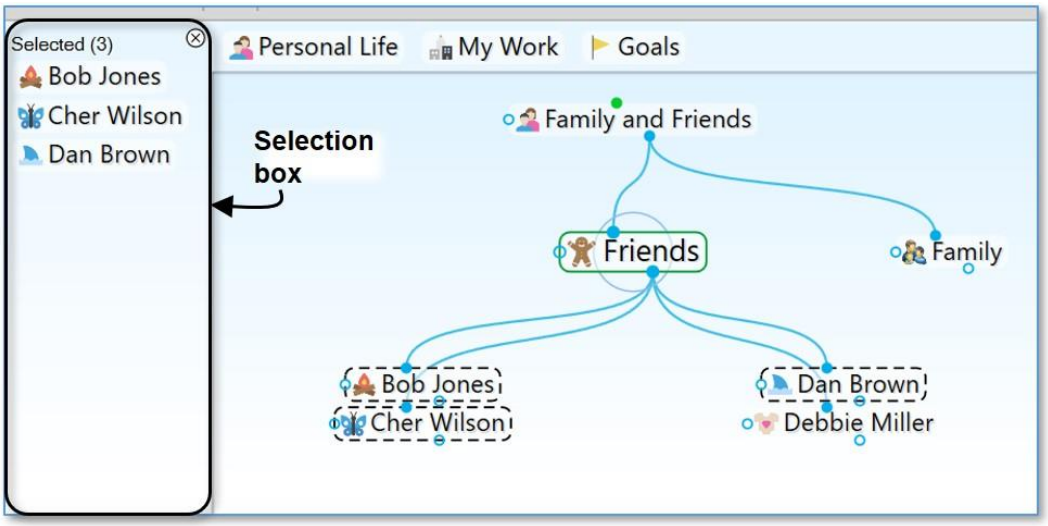



**Figure 101. Selection Box and Selected Thoughts**

**To de-select individual Thoughts:**

- Hold down the **Ctrl** key as you click a Thought (either in the Plex or in the Selection box) to de-select just that Thought.

**To close the Selection box and de-select all Thoughts:**

- Click the close button in the top-right corner of the Selection box. The button will turn red as you point to it and after the box is closed the Thoughts will no longer be selected in the Plex.

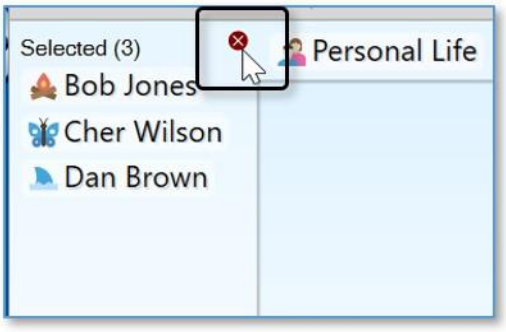



**Figure 102. Closing the Selection Box**

**To perform actions on selected Thoughts:**

- Right-click in the Selection box and select the action of your choice on the context menu. The entries in this menu are also displayed in the **Edit** menu.

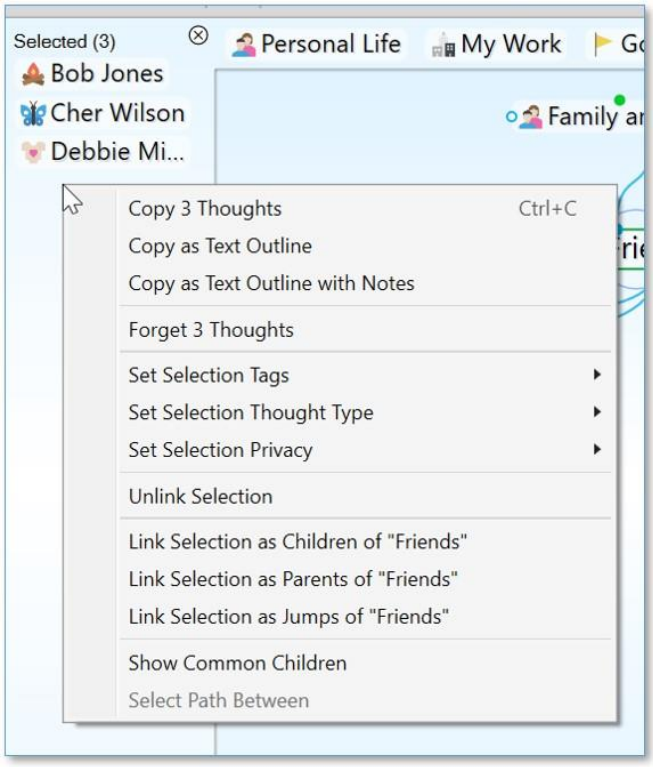



**Figure 103. Selection Box Context Menu**

### Other Selection Uses

Once you have created a selection, you can also use it for other things besides what you see in the menu. For example, you can limit searches to selected Thoughts. In the example below, only “Debbie Miller” is found because it is the only Thought name beginning with “D” that is currently selected.

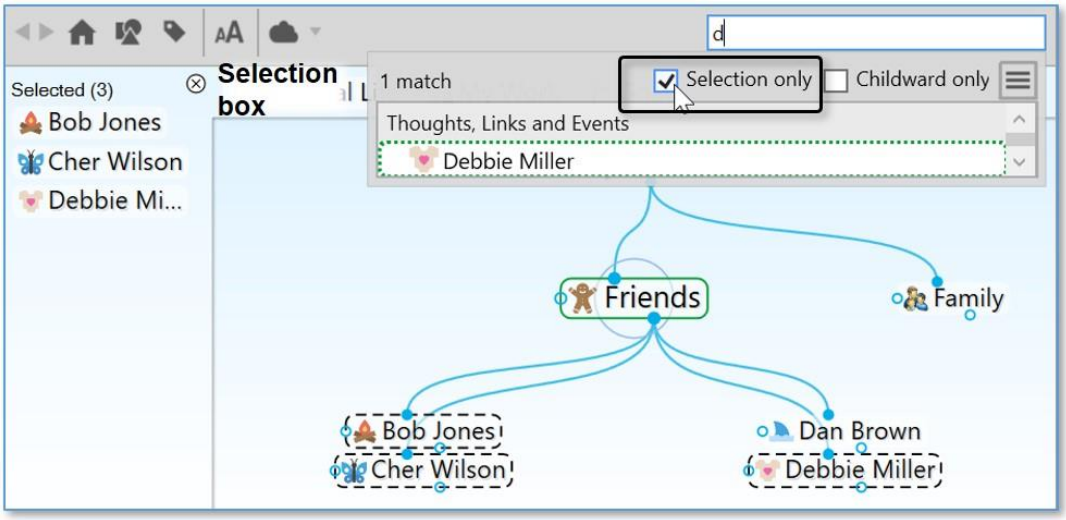



**Figure 104. Limiting Searches to Selected Thoughts**

## Forgetting and Deleting Thoughts

When you no longer need a Thought, it can be forgotten or deleted. A forgotten Thought may be remembered and restored later, or deleted. A deleted Thought is gone forever. This is similar to the Recycle Bin/Trash feature on your desktop which stores your deleted files until you choose to remove them permanently.

**To forget a Thought:**

- Right-click the Thought to be deleted, then click **Forget *Thought Name*** in the context menu, or
- Click the active Thought to be forgotten, click the menu button in the **Thought Properties** dialog box, then, click the **Forget *Thought Name*** command.

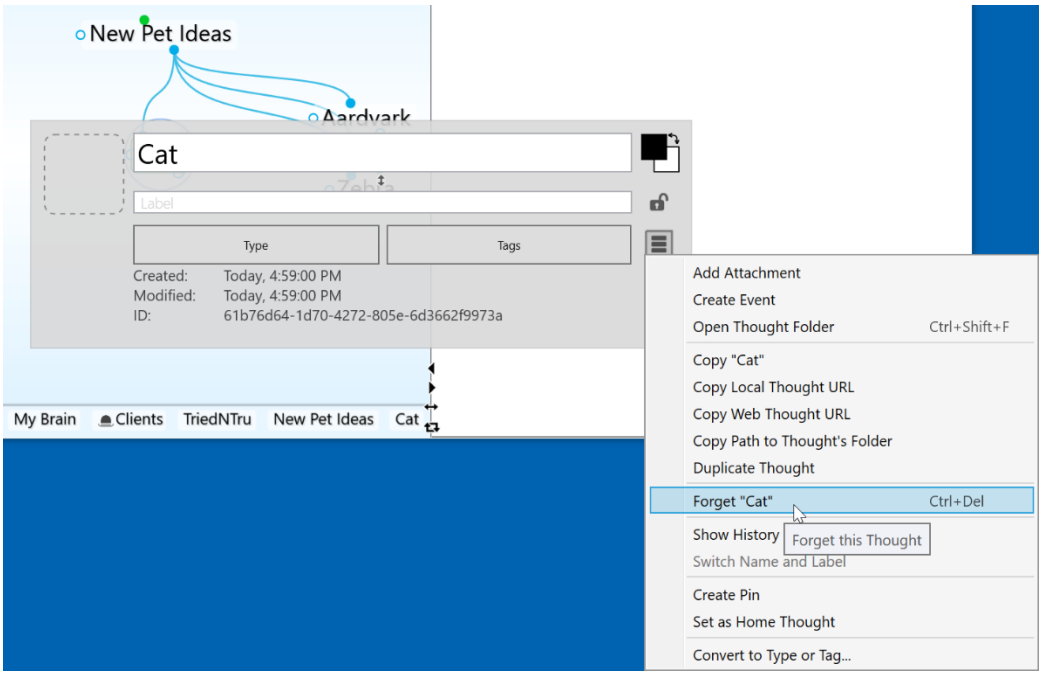



**Figure 105. Forgetting a Thought in its Thought Properties Dialog Box**

Once a Thought has been forgotten it will disappear from the display. If you want to access it again later temporarily, you can do so by turning on the display of forgotten Thoughts. You can also permanently delete forgotten Thoughts or you can remember them.

**To access forgotten Thoughts:**

1. Click the **Options** menu, then click the **Show Forgotten Thoughts** command. Any forgotten Thoughts will appear grayed out in the Plex.

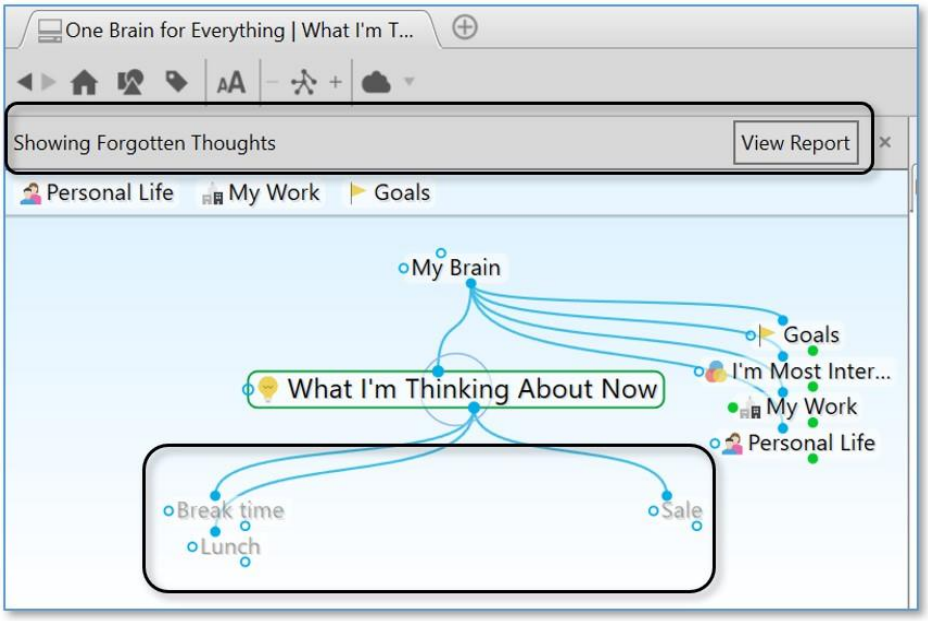



**Figure 106. Forgotten Thoughts in the Plex**

2. Notice the “Showing Forgotten Thoughts” message above the pins. This reminds you why some Thoughts are grayed. You can use forgotten Thoughts just like normal Thoughts as long as they are displayed. Click the **View Report** button to work directly with the forgotten Thoughts.

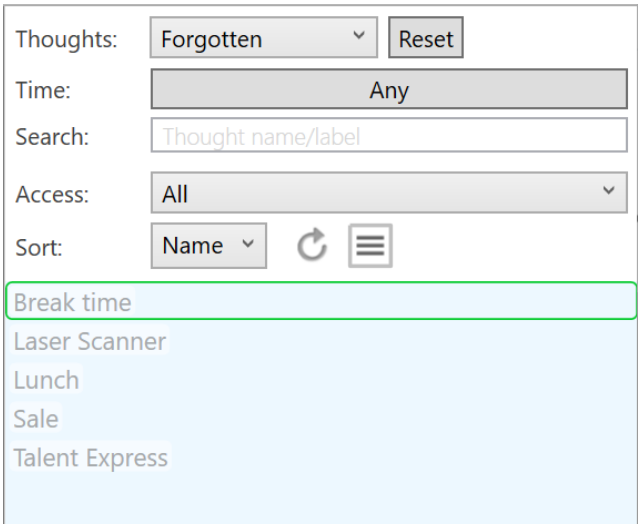



**Figure 107. Forgotten Thoughts in the Report Tab**

3. You can click on a Thought in the **Reports** tab to activate it.

**To delete all forgotten Thoughts using the Reports tab:**

- Click the **Reports** tab menu button, then click the **Delete All** command. You will be prompted to confirm the deletion. Alternately, you can use the **Ctrl** key to select multiple individual forgotten Thoughts and then delete only those.

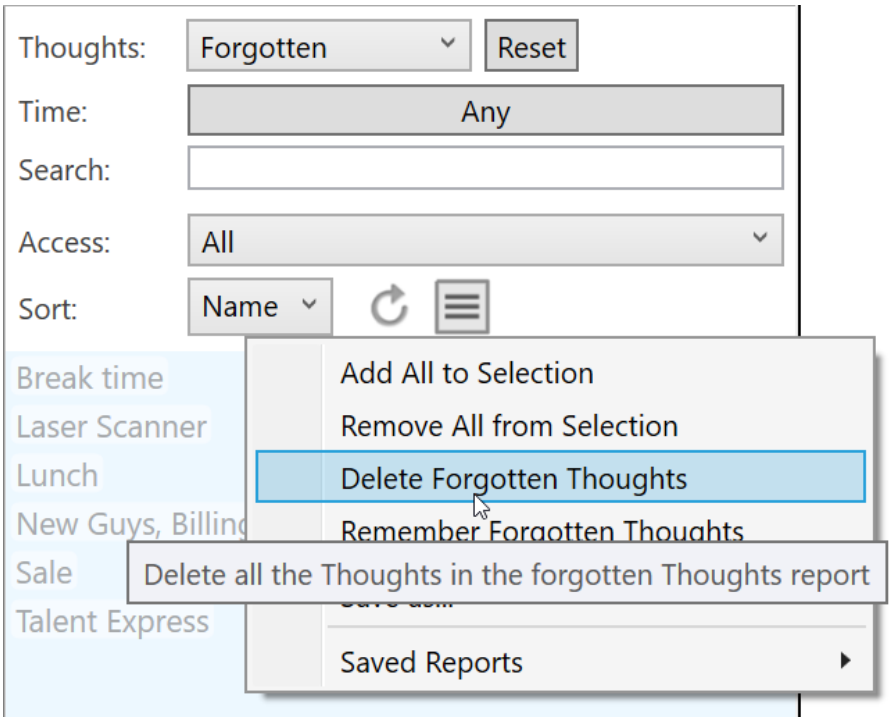



**Figure 108. Using the Report Tab to Delete All Forgotten Thoughts**

- You can click the **Refresh** button on the **Reports** tab to update the list.

Closing the **Forgotten Thoughts** dialog box hides the forgotten Thoughts. You can also reinstate forgotten Thoughts by clicking the **Remember All** command in the **Reports** tab menu. You can also reinstate an individual forgotten Thought by right-clicking in the Plex, then clicking the Remember *Thought name* command on the context menu.

It is generally recommended to forget Thoughts when you don't need them so that you can easily retrieve them if you change your mind. If you are sure you will *never* need a Thought again and you do not want to be able to remember it in the future, you can delete it immediately without forgetting it first.

**To delete a Thought instantly:**

1. Hold down the **Shift** key (for Windows)/Alt key (for Mac) as you right-click the Thought to be deleted. The context menu will be displayed, showing the **Delete *Thought name*** command in place of the **Forget *Thought name*** command.

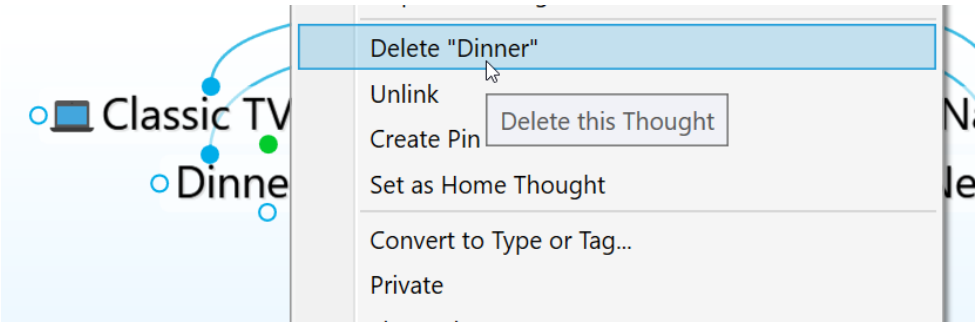



**Figure 109. Shift-Right-Click Context Menu for a Thought**

2. Click the **Delete *Thought name*** command. The Thought will be permanently deleted. See Selecting Multiple Thoughts on page 98 for forgetting or deleting multiple Thoughts at once.

---

When a file attachment is deleted, the file is placed into an internal trash folder in case the delete needs to be undone. When undo is cleared, the trash is emptied. The files are then moved to the OS trash/recycle bin so you have further opportunity to recover the file if needed.

---

**Tip:** If you delete something by accident you can still recover it if you use the **Undo** command immediately.

## Unlinking Thoughts

**To unlink a Thought:**

- Right-click the link, then click the **Unlink** command on the context menu

**Tip:** If you are moving a Thought from one place to another by linking and unlinking it, it is generally easier to do the unlinking after you have done the linking. This avoids making the Thought into an “orphan,” a Thought with no relatives.

If you have difficulty telling which link you are pointing at with the mouse, just look at the highlighted Thoughts. When the mouse pointer is over a link, it is highlighted along with the two Thoughts it connects. This makes it easy to tell which Thoughts will be unlinked if you click on the link.

In addition to being able to unlink Thoughts one link at a time, you can also select multiple Thoughts to unlink several of them at once. To do so:

- Select the Thoughts you want to unlink by holding down the **Ctrl** key and clicking on each one, or **Ctrl** drag a box around Thoughts in the same area

- Activate the Thought from which you wish to unlink the selected Thoughts
- Right-click in the Selection box and select the **Unlink Selection** command

## Linking Existing Thoughts

As noted previously, links are *power*. Not only do links allow for associations that group Thoughts conceptually, they allow information to be stored in and accessible from numerous places.

A single Thought may have relationships with multiple Thoughts. For example, you may want a Thought named “Aunt Mary” to be a child of your “Mentors” Thought and also a child of your “Family” Thought. If your Aunt Mary is also helping you plan your next vacation, her Thought may also be a child or jump Thought to your “Vacation” Thought. The possibilities are endless.

There are several ways to link to existing Thoughts, as described in the following sections.

### Link to Thoughts Visible in the Plex

When the Thoughts you want to link are both visible in the Plex, you can simply drag from the desired gate of one Thought in the Plex to another Thought in the Plex. Note that the Thought you drag from or to does not have to be the active Thought.

In the Normal view, the display of Thoughts is limited to close relations. You may find it useful to expand the view when linking Thoughts, because you can see more Thoughts at once.

### Link by Dragging to a Pin

You can Link to a Thought that is not visible in the Plex if it has a pin. Simply drag from the appropriate gate to the pin. When you want to link a Thought to many other Thoughts, create a pin of the Thought so you can quickly link to it. A pin’s gates appear when you point at the pin with the mouse.

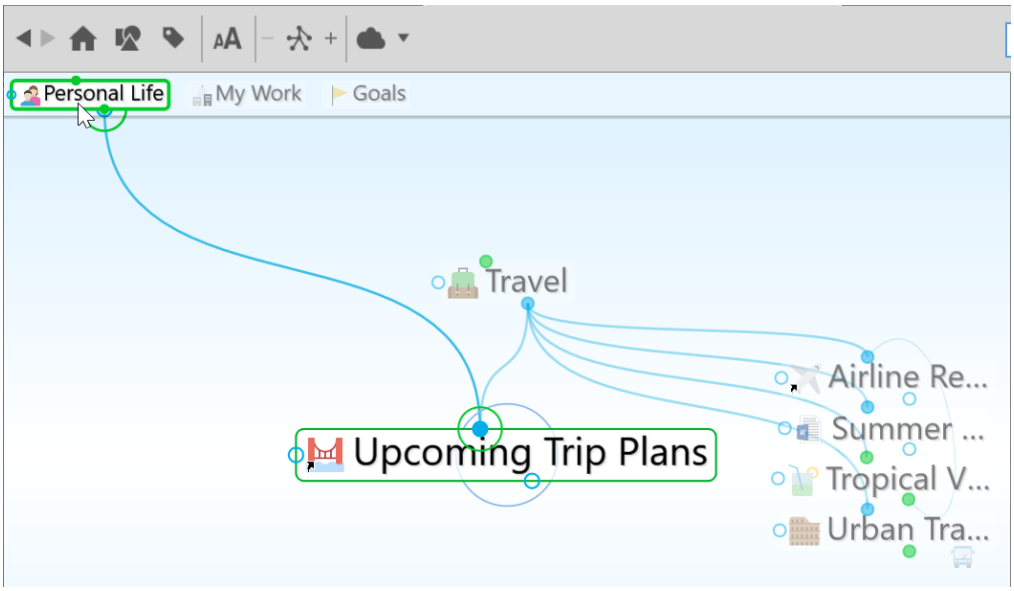



**Figure 110. Link by Dragging to a Pin**

The relationship you establish by linking a Thought to a pin is between the Thoughts; if you delete the pin, the Link between the Thoughts is still intact.

## Link by Dragging to the Past Thought List

You can link a Thought in the Plex to a Thought in the past Thought list. Like pins, gates for a Thought in the Past Thought List appear when you point at the past Thought with the mouse.

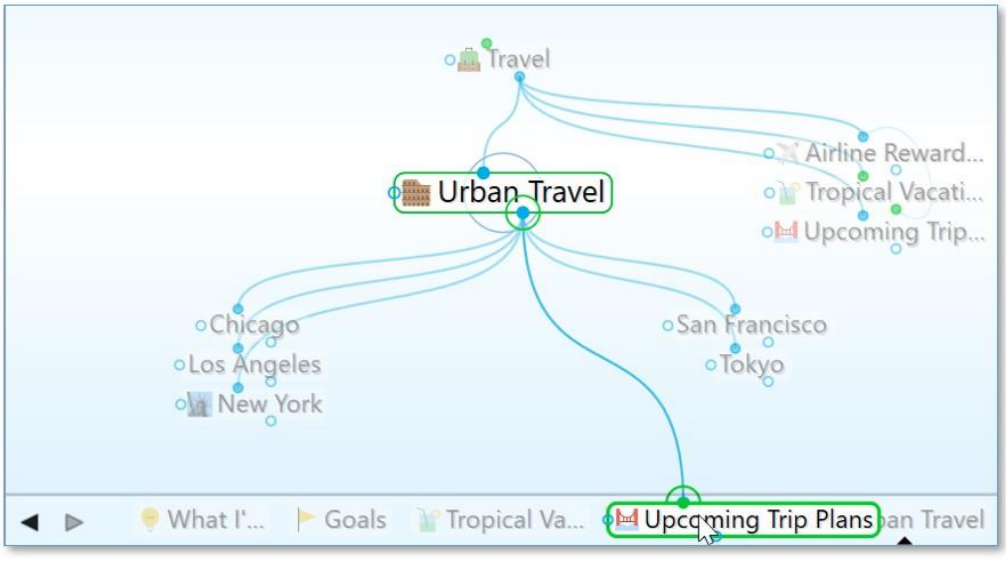



**Figure 111. Link by Dragging to a Thought in the Past Thought List**

## Link by Selecting a Thought in the Existing Thought List

You can also link by using the **Thought Creation** dialog box:

1. Make the Thought you want to link from the active Thought, then start creating a Thought by dragging or using the **Thought** menu. The **Thought Creation** dialog box appears.

2. Type the first few letters of the name of the Thought you want to link to. Double-click on the Thought you want to link when you see it in the **Existing Thought List** that appears below (or click it once, then click in the Thought name field and press the **Enter** key).

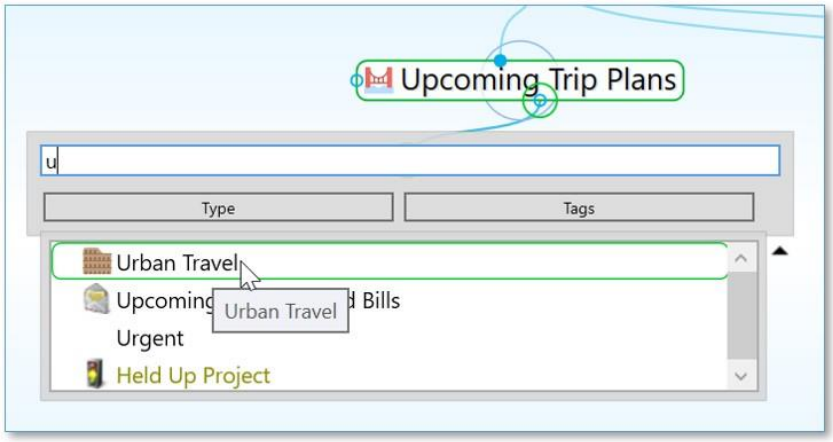



**Figure 112. Create a Link by Starting to Create a Child Thought**

## Link Using the Selection Box

Thoughts in the Selection box can be linked to the active Thought using the Selection menu:

1. Select the Thought or Thoughts you want to link using **Ctrl**-click or by holding down the **Ctrl** key as you drag a box around the Thoughts if they're next to each other.

2. Activate the Thought in the Plex to which you want to link.

3. Right-click the Selection box, then click the link command of your choice in the context menu.

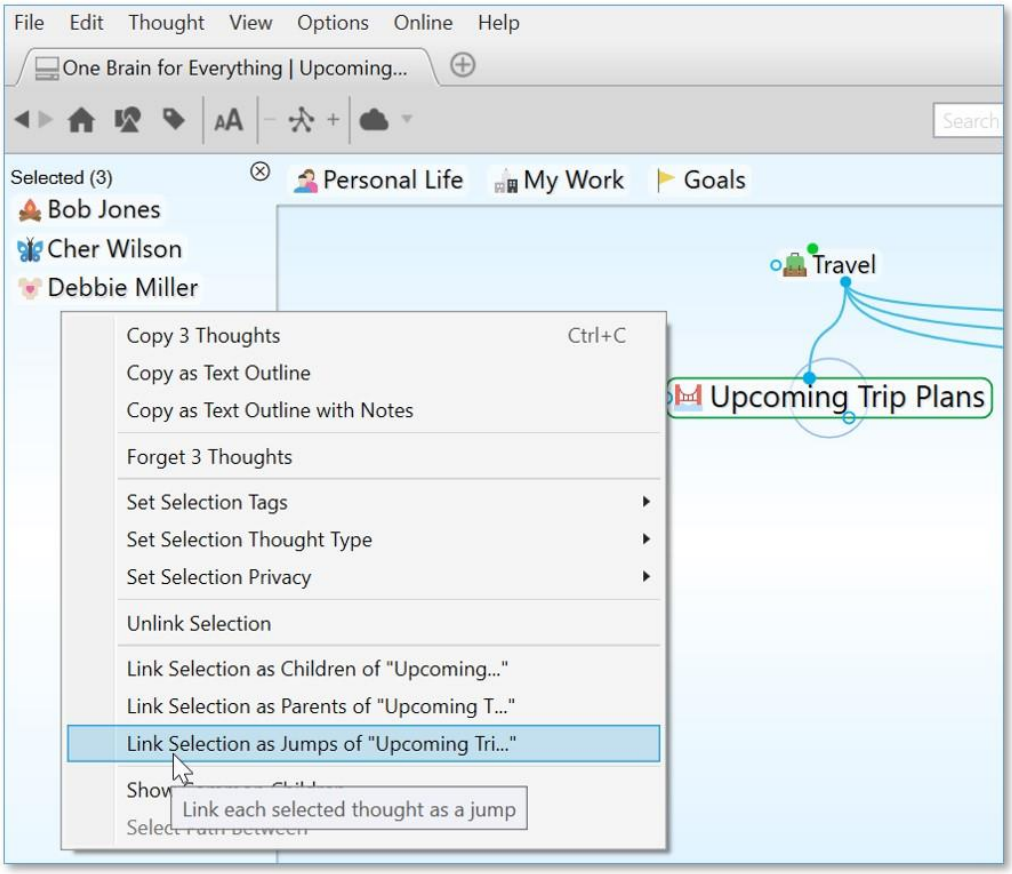



**Figure 113. Linking Using the Selection Box**

### Cancel Creation of a Link

Press the **Esc** key while dragging a link to abort the process. (The mouse button should still be held down while you press **Esc**.)

## Changing Relationships Using Drag and Drop

Say that you decide that your “Product Promotions” Thought shouldn’t really be a child of your “Customer Service” Thought. Instead, it should be the child of “Business Development.” You can quickly change relationships between Thoughts in a single step: Hold down the **Shift** key while linking a Thought to a new parent. All of the current parents will be unlinked automatically. Note that even if a Thought has more than one parent, all of the former parents will be unlinked.

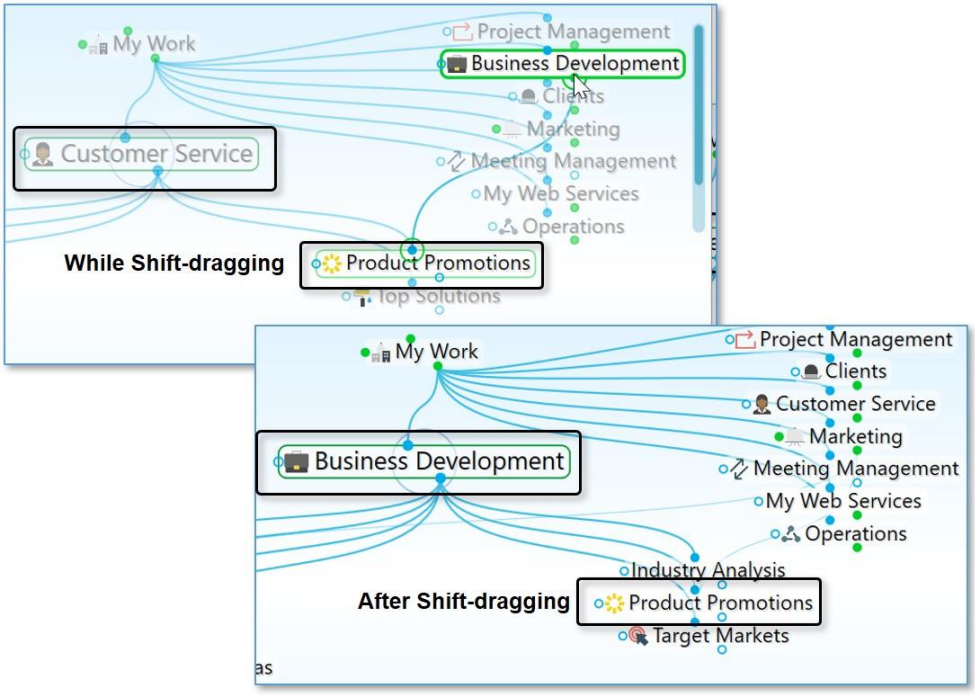



**Figure 114. Shift-Dragging to Change Relationships**

# Customizing Thought and Link Properties

You can change the colors of Thoughts and links globally using the **Brain Theme** window (see the Customizing Your Brain's Appearance section on page 56). This section explains how to view and manage the properties of individual and selected Thoughts and links. Changed settings override the global defaults.

## Changing the Properties of a Thought

**To open the Thought Properties dialog box, use any of these methods:**

- Click the active Thought, or
- Click the Thought once to select it, then a second time to open the box, or
- **Alt**-click the Thought (whether or not the Thought is active), or
- Right-click the Thought, then click **Show Thought Properties** on the context menu, or
- Click the Thought to select it, click the **Thought** menu in the menu bar, then click the **Show Thought Properties** command

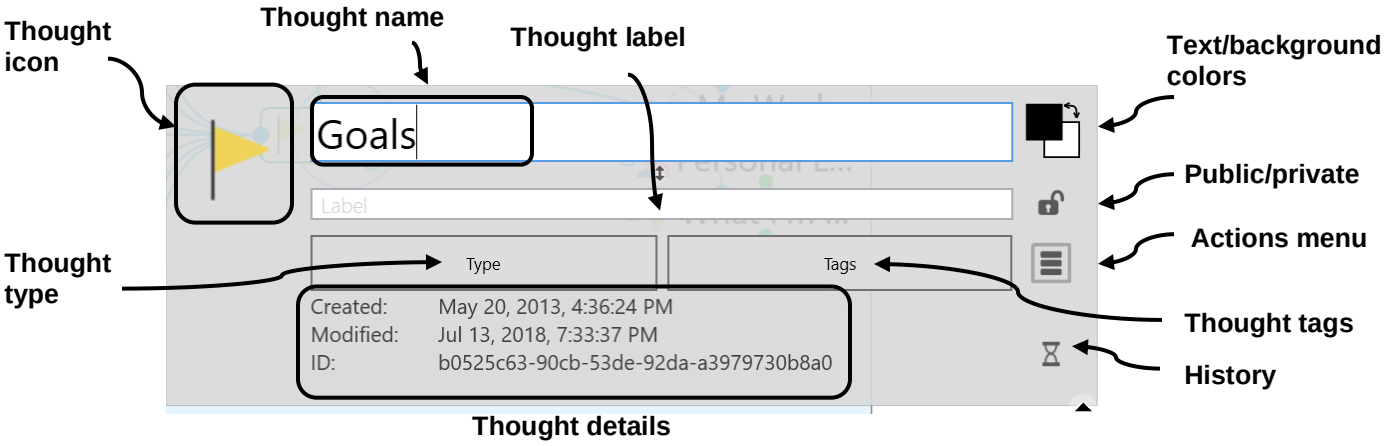



**Figure 115. Thought Properties Dialog Box**

Press the **Enter** key or click anywhere outside of the dialog box to close it and save any changes.

You can use the **Thought Properties** dialog box to:

- Rename a Thought
- Add or edit a Thought Label
- Add or change a Thought Type
- Click the pencil icon next to the Thought Type button to activate the type if there is one associated with the Thought and modify its appearance
- Add or change a Thought Tag
- Mark the Thought as Private or Public
- Customize the Thought text or background color (just this Thought; global changes are done in the **Themes** window)
- Add or change the Thought's icon
- Review the Thought's creation/modification history and ID. The ID is not normally needed but may be useful when troubleshooting.
- And, using the **Thought Properties** menu button:
  - Forget the Thought
  - Create a Pin
  - Set as the Home Thought

## Changing the Colors of a Thought

While Thought colors are set globally in the **Brain Theme** window, you can override these settings for individual Thoughts. To begin, activate the Thought, then click on it or **Alt**-click on any inactive Thought.

Note that the individual changes you may make to Thoughts, such as their color and background, override the settings in the **Brain Theme** window.

**To change the text color of a Thought:**

- Click the upper color square, click the color of your choice, then click outside of the box of colors.

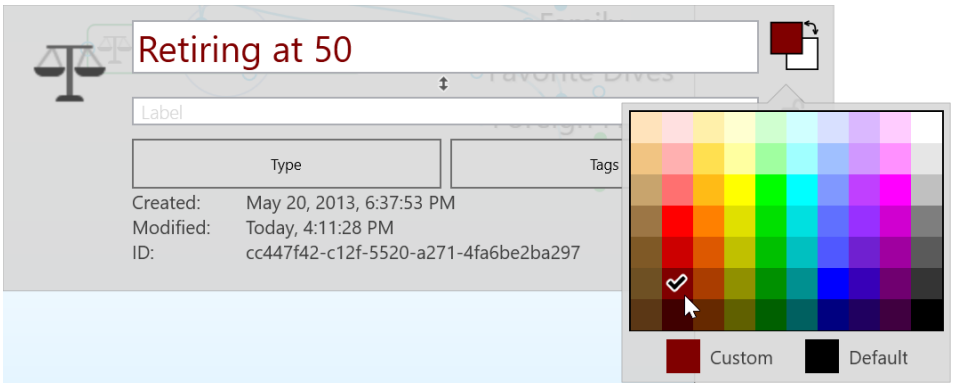



**Figure 116. Text Color in the Thought Properties Dialog Box**

### To change the background color of a Thought:

- Click the lower color square, click the color of your choice, then click outside of the box of colors.

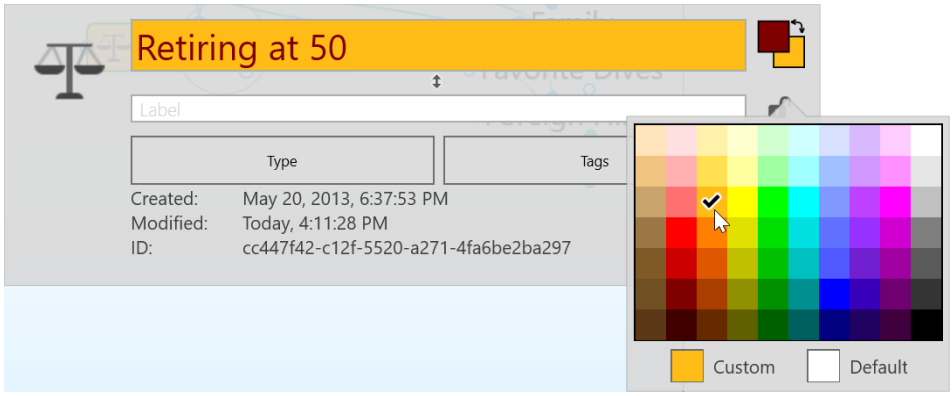



**Figure 117. Background Color in the Thought Properties Dialog Box**

### To swap a Thought's text color with its background color:

- Click the double-headed arrow next to the two color sample squares in the top-right area of the **Thought Properties** dialog box.

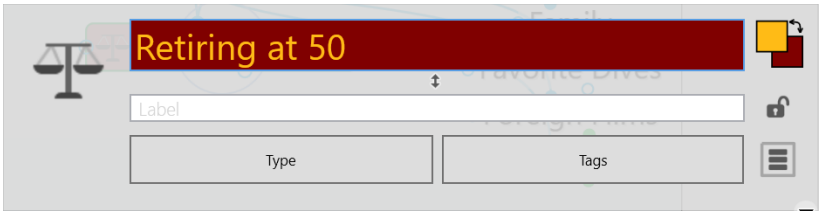



**Figure 118. Swapping Text and Background Colors**

You can use the same techniques to fine-tune new colors for Thought text and background as you can use to define colors globally in the **Brain Theme** window. Please see the Defining and Selecting Additional Colors section on page 60 for details.

## Adding a Label to a Thought

Labels are hints that appear below Thoughts when you point the mouse at the Thought.

**Figure 119. A Thought Label**

**To add a label during Thought creation:**

1. While typing a new Thought name, add a pipe symbol (|) and anything after will become the Thought's label.

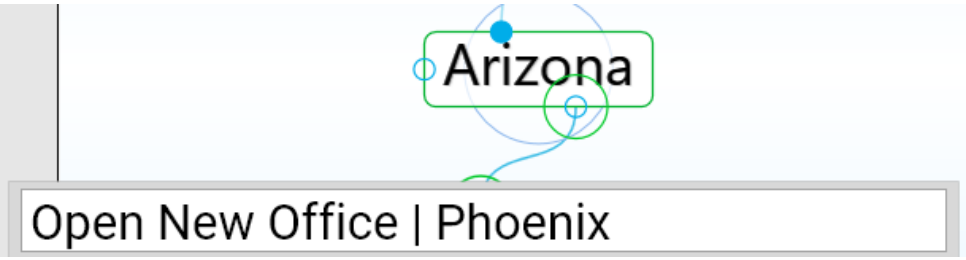



**Figure 120. Adding a Pipe Symbol During Thought Naming**

**To add a label to an existing Thought:**

1. Activate the Thought, then click on it or **Alt**-click on any inactive Thought.
2. Type the text for the label in the **Label** field, then press the **Enter** key. When you point at the Thought, the label text will appear in a box below the Thought.

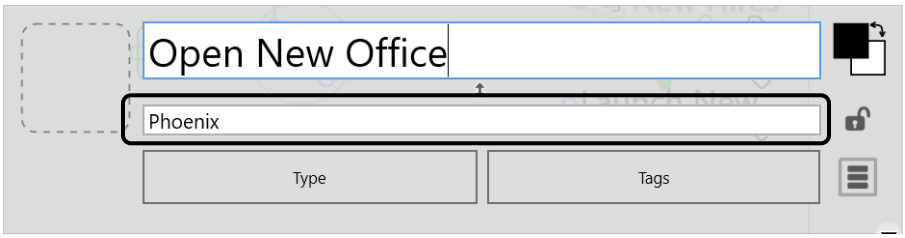



**Figure 121. Label Field in Thought Properties Dialog Box**

## Swapping a Thought's Name with its Label

You can swap a Thought's name with its label by clicking the **Switch** button in the **Thought Properties** dialog box. This can be very useful when the default

label and name are assigned based on a URL and the automatic naming isn't optimal for your purposes.

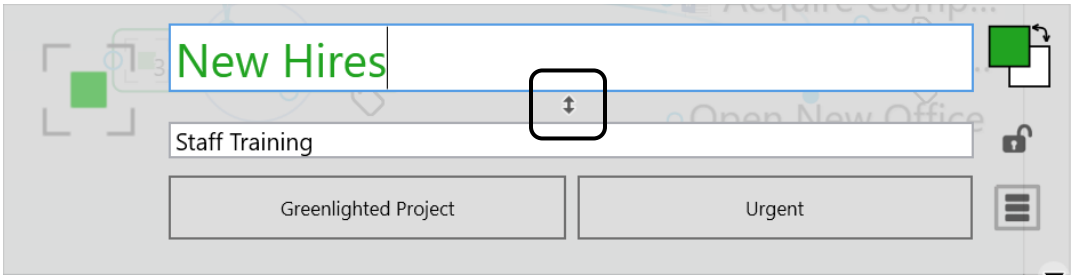



**Figure 122. Swapping Label and Thought Names**

## Adding a Picture to a Thought

You can attach an icon from TheBrain's built-in selection, an image from a file of your own, or a screen capture to any Thoughts. These pictures provide a visual boost to your Brain. When you point to the icon next to the Thought, the picture zooms to a larger size automatically.

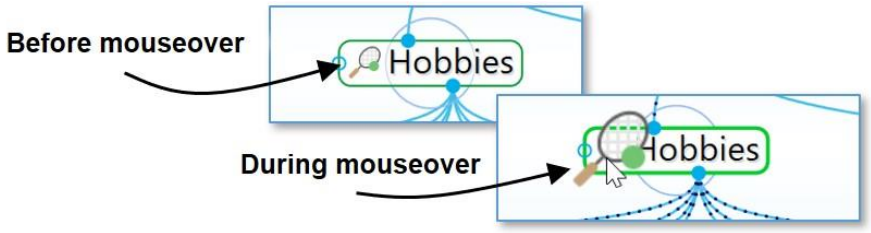



**Figure 123. A Thought Icon**

### To insert an icon from TheBrain's built-in icon library:

1. Click the Thought icon box, then click the **Select Stock Icon** command.

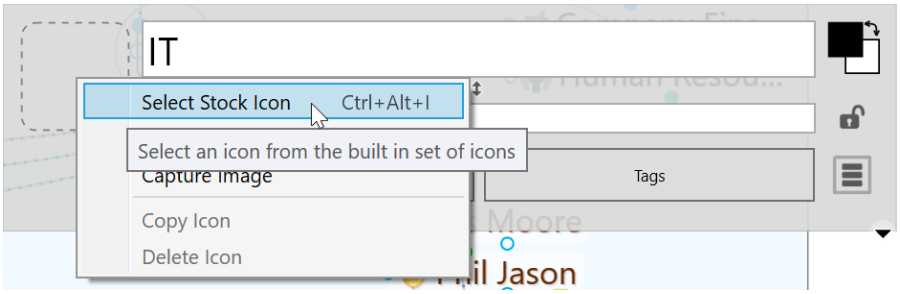



**Figure 124. Select an Icon from the Built-in Library**

2. With the Browse radio button selected, click any of the categories in the left panel. (See the TheBrain Icons section on page 214 for more about icon choices.) Click an icon of your choice to add it to the Thought. The **Thought Properties** dialog box will close automatically when an icon is selected.

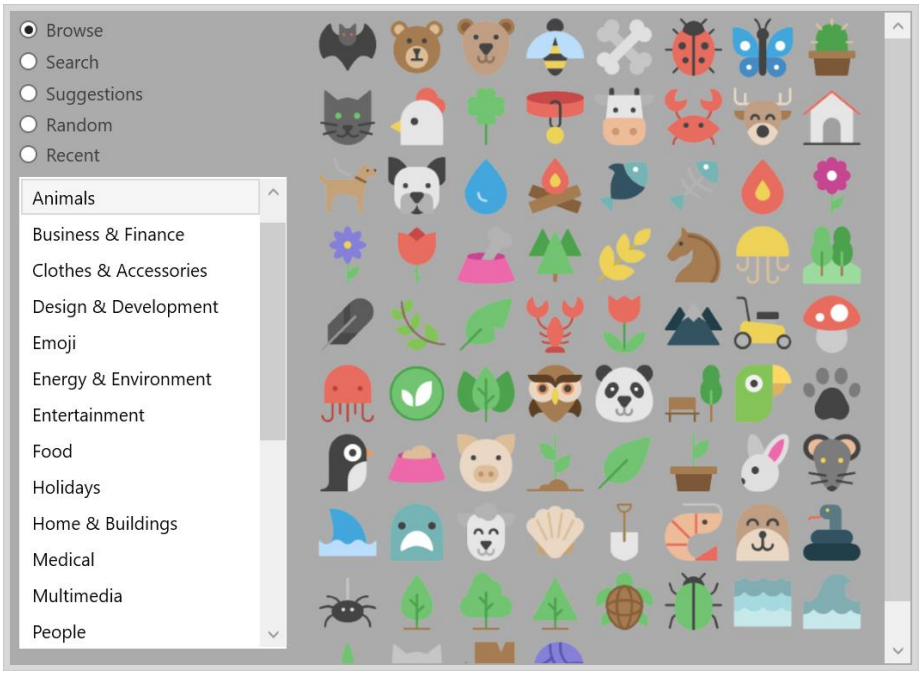



**Figure 125. Icon Choices**

### To insert an image from a file as a Thought icon:

1. Click the Thought icon box, then click the **Choose File** command.

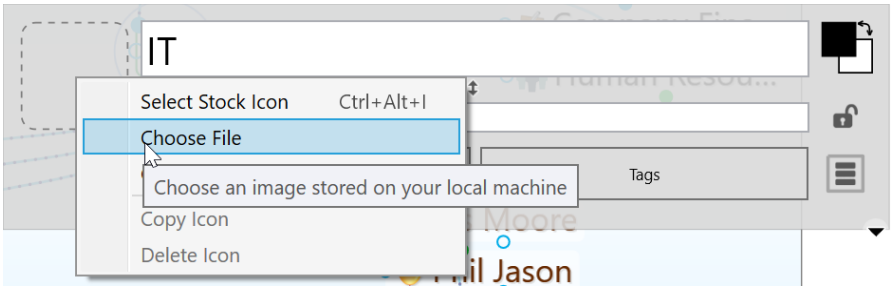



**Figure 126. Choose a File to Use as an Icon**

2. Navigate to the file of your choice, then click the **Open** button. Supported file formats for images include .jpg, .png, and .gif.

### To insert a screen capture of an image as a Thought icon:

1. Make sure the screen item you want to capture is visible, then activate the Thought and click on it or **Alt**-click on any inactive Thought.

2. Click the Thought icon box, then click the **Capture Image** command.

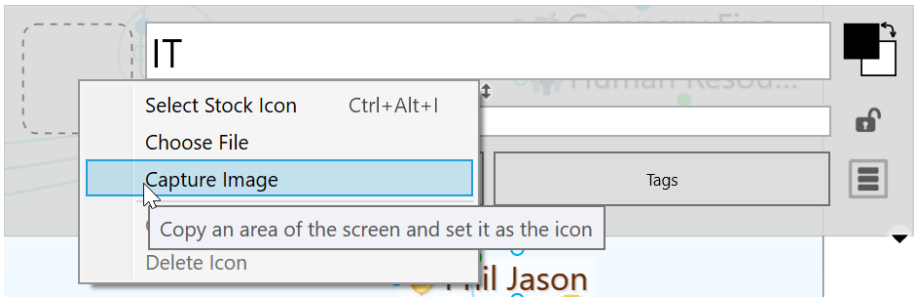



**Figure 127. Capture Something on the Screen to Use as an Icon**

3. Your Brain will be hidden temporarily and red cross hairs will appear on the screen. Drag a rectangle around the area to be captured by dragging the mouse in a diagonal line from one corner of the rectangle to the opposite corner, then releasing the mouse button.

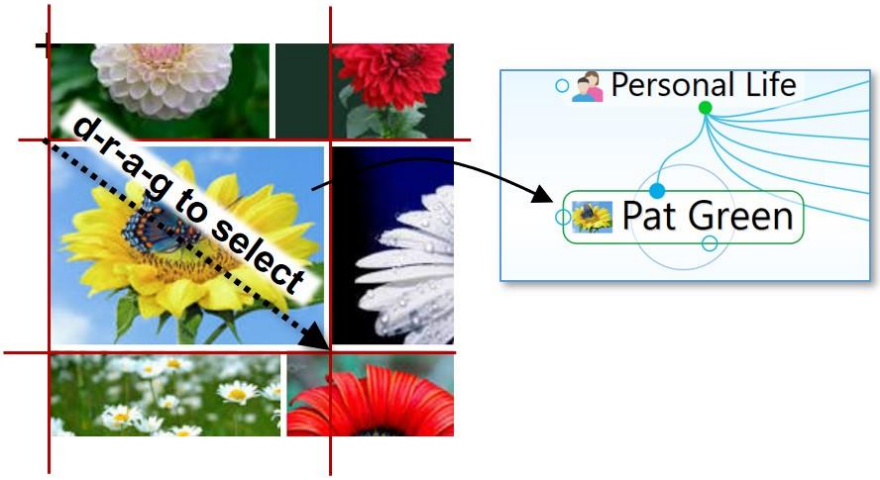



**Figure 128. Using the Crosshair to Capture an Image**

4. When you release the mouse, the image will be in the Icon area of the **Thought Properties** dialog box.

**Tip:** To capture from the Brain window itself, press the **Tab** key to toggle its visibility. You will see the crosshairs and you can drag to select the area of your choice.

While the captured item will become a picture, the source can be anything—a company logo, a photo, or part of an Excel worksheet or PDF file.

**To paste an image you copy from somewhere else:**

1. Copy the image using standard techniques. For example, you may right-click an image on a web page, then click the **Copy Image** command.

2. After the image is copied, from the **Thought Properties** dialog box, click the Thought icon box or right-click on a Thought in the Plex and select the **Paste Icon** command.

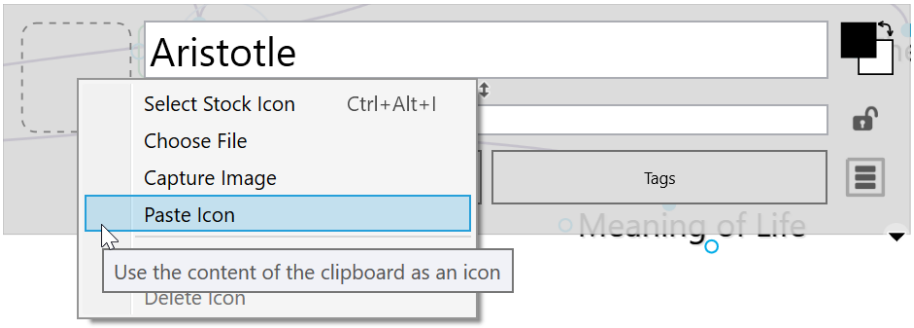



**Figure 129. Capture Something You've Copied to Use as an Icon**

**To copy an image from the Thought to someplace else:**

Images you capture can be copied and pasted as attachments, pasted into Notes or the Plex, or used as icons.

1. Click the Thought icon box, then click the **Copy Icon** command.

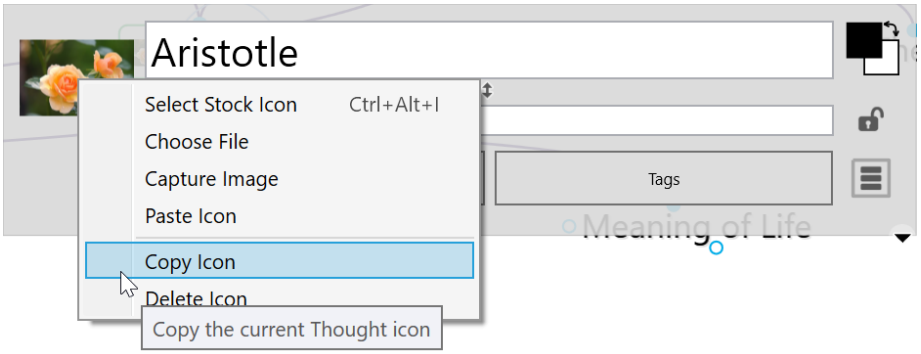



**Figure 130. Copy the Icon to Use Elsewhere**

2. The icon you copied can be pasted elsewhere, such as in a Thought's **Notes** tab or elsewhere on your computer.

To change a Thought's icon, repeat the steps above. The icon will be replaced.

**To delete a Thought's icon:**

1. Click the Thought icon box, then click the **Delete Icon** command.

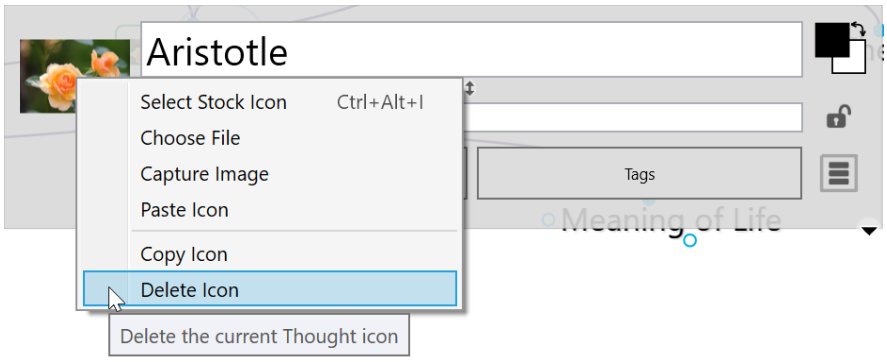



**Figure 131. Removing a Thought Icon**

### Inherited Properties Will be Displayed in the Thought 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 also clearly indicated.

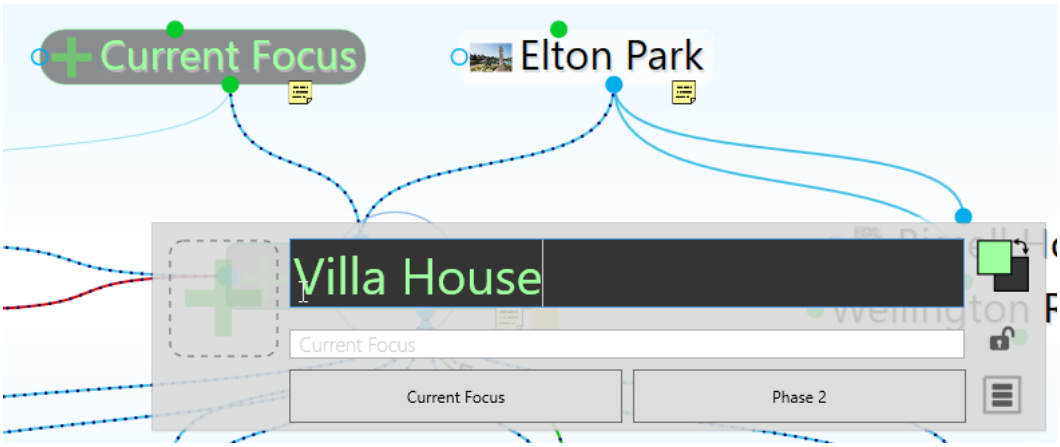



**Figure 132. Properties Dialog Improvements**

### Making Thoughts Private

Thoughts may be marked "Private." Private Thoughts will appear with a small lock icon shown below and to the right of the Thought. The lock appears whether the Private Thought is active or not. If you make your Brain publicly viewable on the web, private thoughts remain hidden from view by read only visitors. To mark a Thought as "Private," click the lock icon in the **Thought Properties** dialog box,

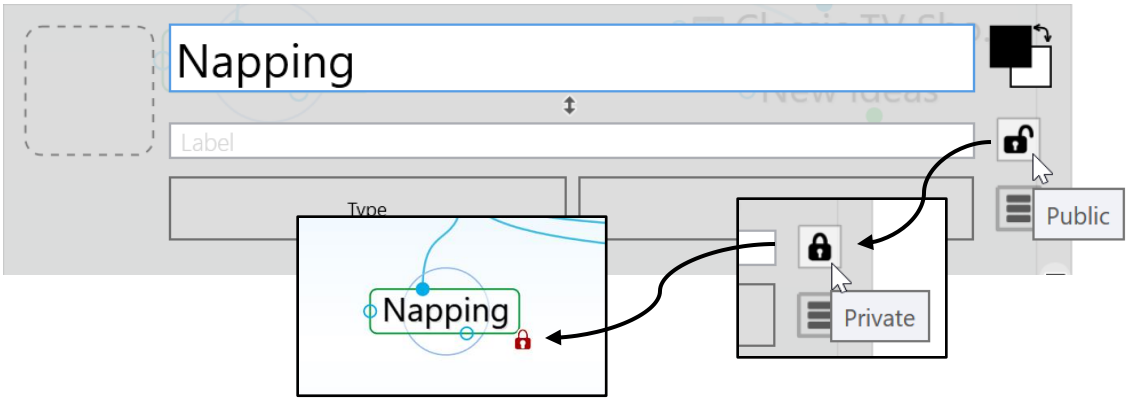



**Figure 133. A Private Thought**

## Using Thought URLs

Each Thought in TheBrain is available via a unique URL. A Thought URL can be used to create links to Thoughts from external third party applications or from other Brains. Thought URLs can also be used within TheBrain as another way to connect Thoughts via links within Notes or as attachments to Thoughts.

Thought URLs can be added as hyperlinks in many third party applications so that when the link is activated, TheBrain will go to the referenced Thought.

**To copy a Thought URL:**

- Right-click the Thought (or click the **Edit** menu), then click the **Copy Local Thought URL** command.

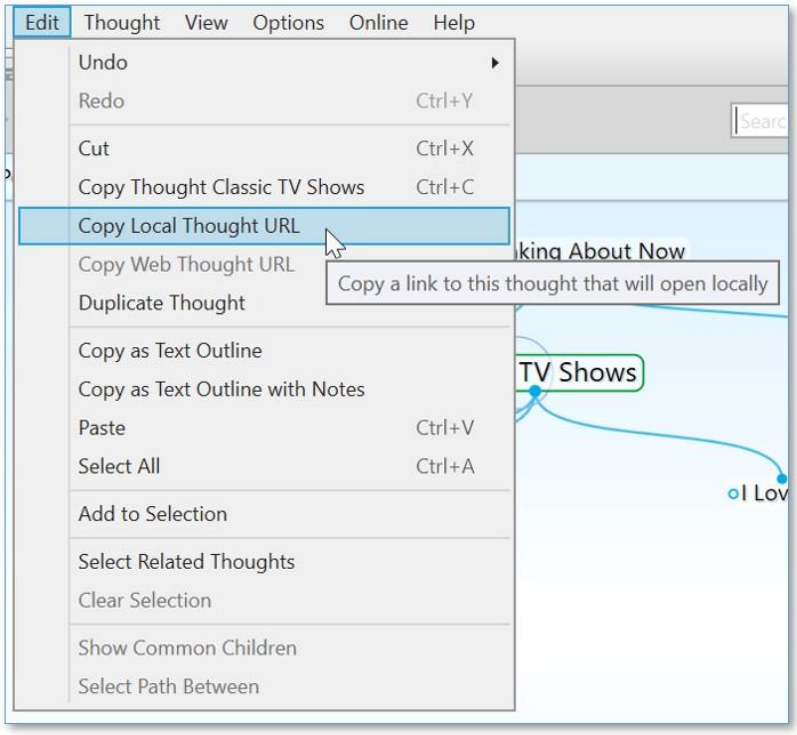



**Figure 134. Copying a Thought URL**

### To paste a copied Thought URL so it will be another Thought's attachment:

1. Activate the Thought to which it should be copied (which may be in the original Brain or any active Brain), then right-click the Thought (or click the **Edit** menu).

2. Click the **Paste Web Link** command. The URL will be added to the Thought as an attachment.

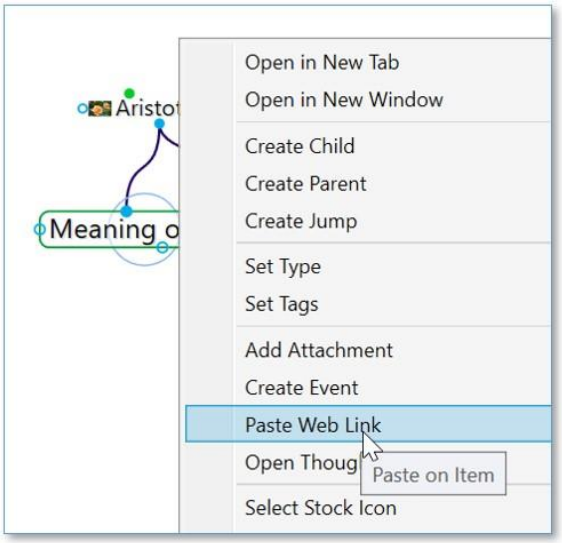



**Figure 135. Pasting a Thought URL**

**To paste a Thought URL after it has been copied so that it becomes a hyperlink in a Note:**

- In the Note, select the text that will be the link, click the Note's menu button, then click the **Insert Link** command. A URL will appear under the Note and then disappear as soon as you click in the Note.

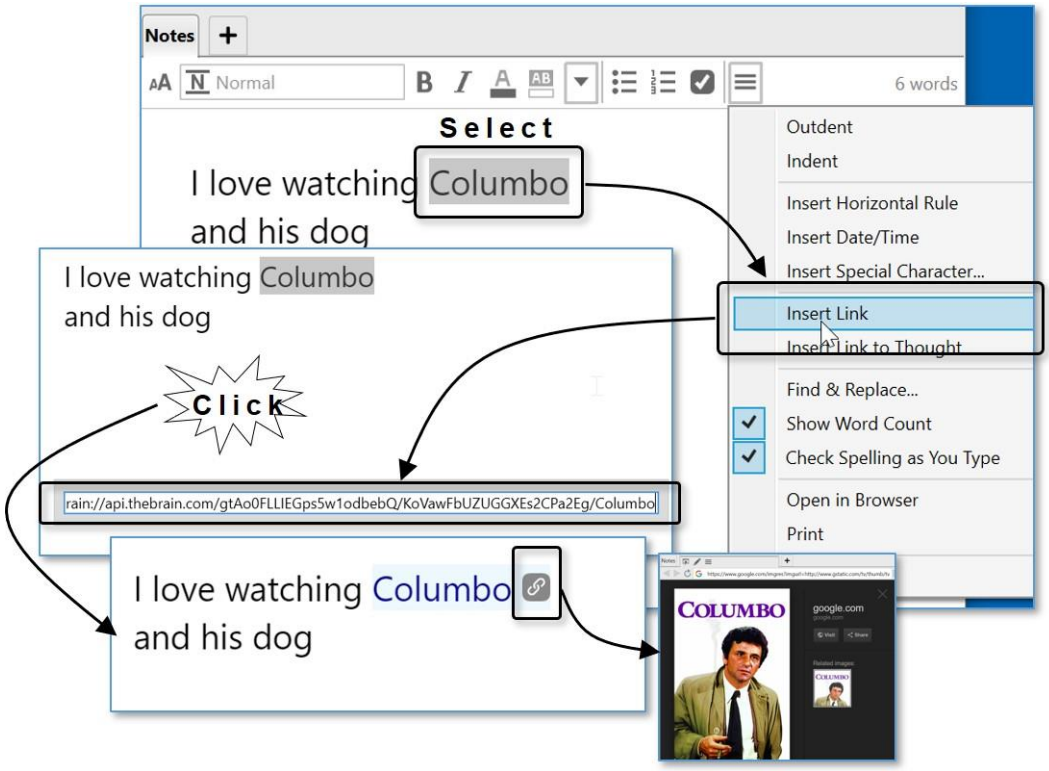



**Figure 136. Inserting a Hyperlink in a Note**

To launch the link, click the link icon to the right of the highlighted text.

## Thought Types and Tags

If you have several Thoughts with which you want to share common attributes, such as color and an icon, you may want to create a Thought type so that these attributes can be easily applied to many Thoughts. This is one use of Thought types.

For example, you may want to create a "person" type for all Thoughts that represent people in your Brain. This type might have a label— "Person"—and a specific color and icon so that all people in your Brain stand out and can be easily recognized.

Type Thoughts can be edited by activating them and using the **Thought Properties** dialog box, just as you would for any other Thought. You can assign attributes, such as icons, Notes, and attachments, to type Thoughts.

**Figure 137. Three "Person" Type Thoughts**

Once a type has been applied to a set of Thoughts, it can also be used to create reports of all Thoughts of that type.

When a type has been assigned to a Thought, that Thought is said to be an "instance" of the type. For example, if you have a Thought named "Jane" of the "Person" type, the Jane Thought is said to be an instance of the Person type.

### Creating a Thought Type

To create a Thought type:

1. Activate the Thought you want to be the first instance of the new type, then click the Thought to open its **Thought Properties** dialog box.
2. Click the **Type** button, then click the **New Type** command. Alternately, you can right-click the Thought, click the **Set Type** command, then click the **New Type** command.
3. Enter the name of the type you want to create, then press the **Enter** key. Click outside of the **Thought Properties** dialog box to close it.
4. If you used the context menu to create the new type, the type will appear as a Thought in the Plex. Type Thoughts are special and have a dotted outline to distinguish them from other Thoughts.

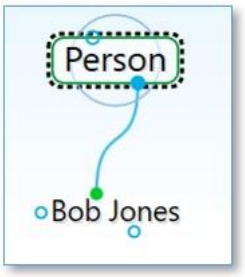
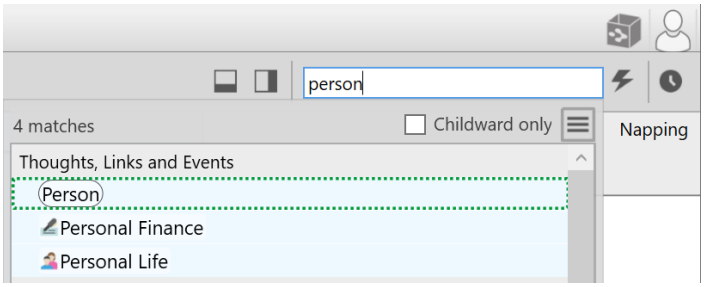
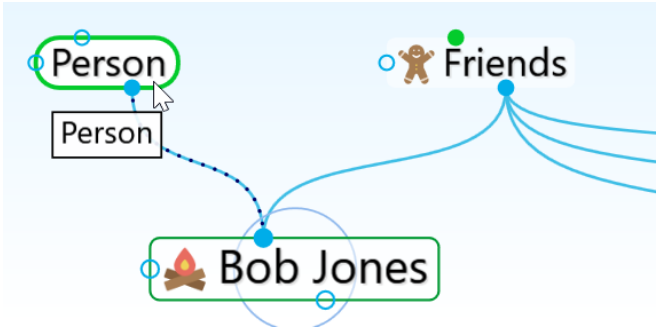
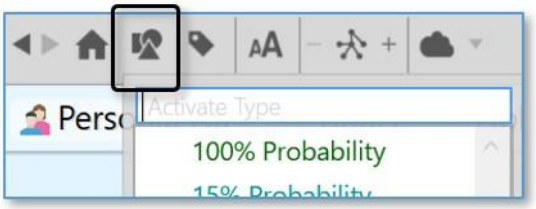



**Figure 138. An Active Type Thought ("Person")**

| To do this ... | Do this ... |
|---|---|
| Locate and Activate a Type Thought | Type the Type's name in Search box as you would to search for any other kind of Thought.   OR Activate any Thought associated with that type, and click on the Parent Thought Type if it is visible.   OR Click the **Activate Type** button in the menu bar, then click the type of your choice or begin typing the name of the type to locate it quickly if the list is long.   |

| To do this ... | Do this ... |
|---|---|
| Delete the active Type Thought | Click the active Type Thought to open its **Thought Properties** dialog box, click the menu button, then click the **Delete *Thought name*** command.<br><br>Note that unlike normal Thoughts, types cannot be forgotten and remembered. Deleting a type removes it from your Brain permanently. |
| Set a Thought's Type | Use any of these methods:<br>▪ Open the Thought's **Thought Properties** dialog box, click the **Type** button, then click the type of your choice, or<br>▪ Right-click the active Thought, click the **Set Type** command, then click the type of your choice, or<br>▪ Click the **Thought** menu when the Thought is active, click the **Set Type** command, then click the type of your choice<br>▪ Link the Thought as a child of the type |
| Set a Thought's Type during Thought creation | Click the **Set Type** button in the **Thought Creation** dialog box, then click the type of your choice |
| Remove a Type from a Thought | Use any of these methods:<br>▪ Open the Thought's **Thought Properties** dialog box, click the **Type** button, then click the **Untyped** button, or<br>▪ Click on the checked Type to unselect it, or<br>▪ Right-click the active Thought, click the **Set Type** command, then click the **Untyped** button, or<br>▪ Click the **Thought** menu when the Thought is active, click the **Set Type** command, then click the **Untyped** button |
| Create new Thoughts linked to the active Type Thought | Drag down from the Type Thought's child gate and continue creating the Thought as usual. |
| Create a Super Type | Drag up from the parent gate of a Type Thought, then continue creating as usual or link to another existing Type Thought. |
| Reuse a Type in another Brain | Copy and paste Type Thoughts from one Brain to another the same way you copy and paste other Thoughts. |

**Tip:** To arrange your display by Thought types, right-click on the Plex background, click **Arrange Thoughts by**, then click **Type**.

Attributes that are assigned to a Thought type are inherited by all instances of the Type but will be overridden if there are attributes assigned directly to the Thought itself. For example, if you have a Thought named “Jane” of the type “Person,” you can assign an icon of a smiley face to the Person type and it will appear next the Jane Thought and all other instances of the Person type. But, if you then assign a picture of Jane as the icon for that Thought, the picture will appear on that Thought (only) instead of the smiley face. Likewise, a label assigned to a specific Thought would override the label of any Thought type assigned to that Thought.

### Super Types

TheBrain supports multiple levels of types for advanced modeling. Just like a Thought can have a type, each type may in turn have a super type. Super types are set on the dialog box for the type in the same way a type is set in a Thought’s **Thought** tab. The attributes assigned to a super type are inherited by its sub types and instances.

Super types can be used when there is a category of Thoughts which is subset of a larger category. For example, the Thought type “Person” could be the super type of the type “Executive.”

To see how to find groups of Thoughts that share one or more of the same Type, please see the Running Reports section beginning on page 194.

### Using Thought Tags

If there are multiple attributes you would like to add to your Thoughts, you can create Thought *Tags*. Tags are useful for flagging Thoughts that you want to be able to reference as a group, without them having to share a common parent. For example, you may want to create a “To do” Tag so you can get a list of all of these Thoughts very quickly.

Tag Thoughts can be edited by activating them and using the **Thought Properties** dialog box, just as you would for any other Thought. You can assign attributes, such as icons, Notes, and attachments, to Tag Thoughts.

Thoughts can have one or many Tags at the same time. Tag Thoughts are global for a Brain and displaying Tag text and icons can be toggled on and off in the **Look & Feel** tab of the **Preferences** window.

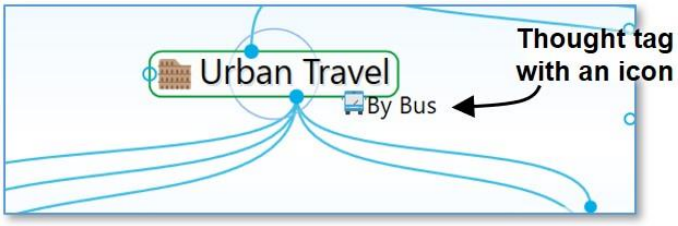



**Figure 139. A Thought with a Tag**

**To create a Thought Tag:**

1. Activate the Thought to which you want to attach a Tag, then click the Thought to open its **Thought Properties** dialog box.

2. Click the **Tags** button, then start typing a name for your new Tag. Alternately, you can right-click the Thought, click the **Set Tags** command, then click the **New Tag** command and start typing a name for your new Tag. You can also create multiple Tags at the same time by typing a semi-colon between each Tag name, just as you can do to create multiple regular Thoughts at the same time.

3. Press the **Enter** key. Click outside of the Tags list to close it, then click outside of the **Thought Properties** dialog box to close it. The new Tag will be attached to the active Thought.

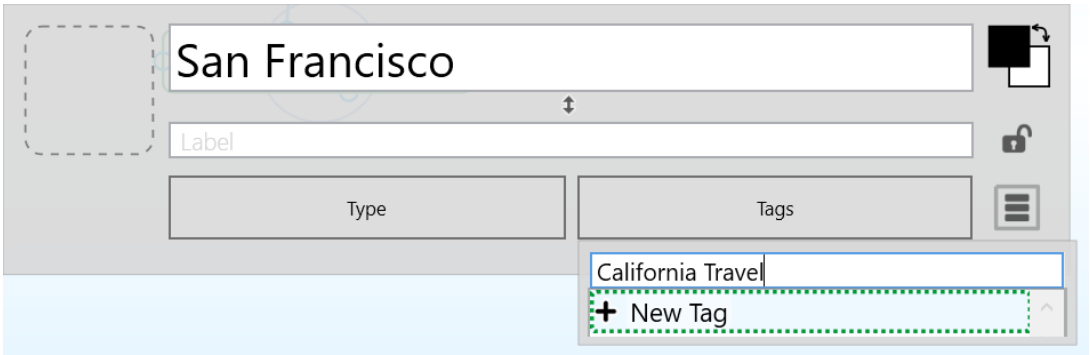



**Figure 140. Creating a New Tag**

Alternately, you can right-click the Thought or click the **Thought** menu, click the **Set Tags** command, then click the **New Tag** command and start typing a name for your new Tag. Press the **Enter** key when you've finished.

You can also assign one or more Tags to a Thought while you're creating the Thought by clicking the **Tags** button in the **Thought Properties** or **Thought Creation** dialog box.

## Assigning and Removing Tags

You can assign and remove Tags using the same general technique as for creating them. The only difference is that instead of typing a new name, you select (to attach) or deselect (to remove) the Tag name(s) in the list.

As shown below, currently assigned Tags are preceded with a check mark. Click an assigned Tag to remove it and click any Tag in the list to assign it to the active Thought. This makes it easy to assign and remove multiple Tags at a time.

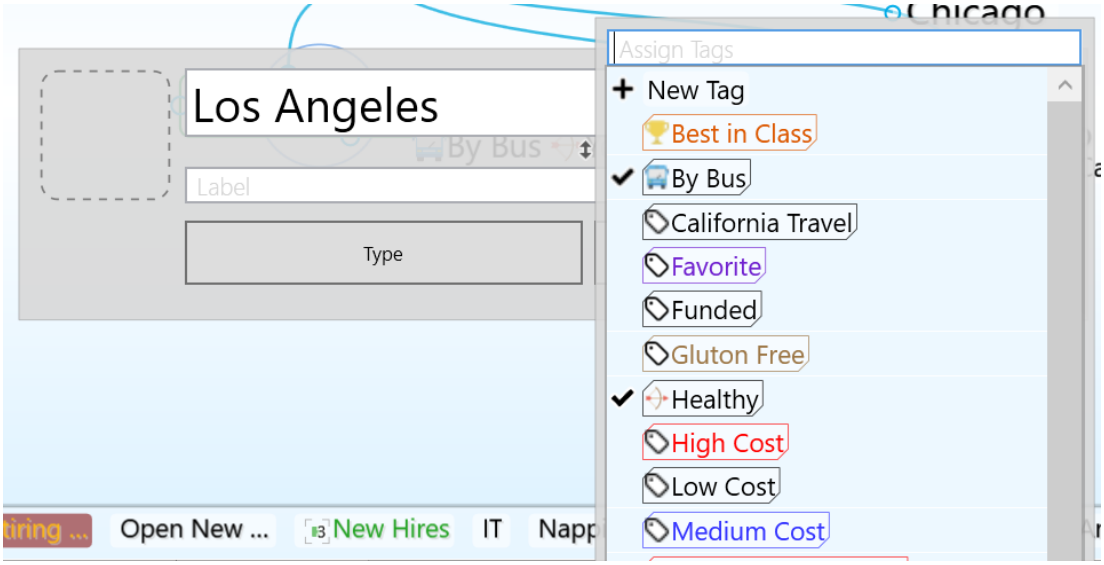



**Figure 141. Assigning and Removing Tags**

## Assigning Tags to Multiple Tags at One Time

If you want to assign Tags to multiple Thoughts at once, first select them, then right-click in the **Selection** tab. Click the **Set Selection Tags** command, then click the **New Tag** command or on any of the Tag names in the list.

## Deleting a Tag

1. Click the **Tags** button on the toolbar, then click the Tag of your choice to activate it.

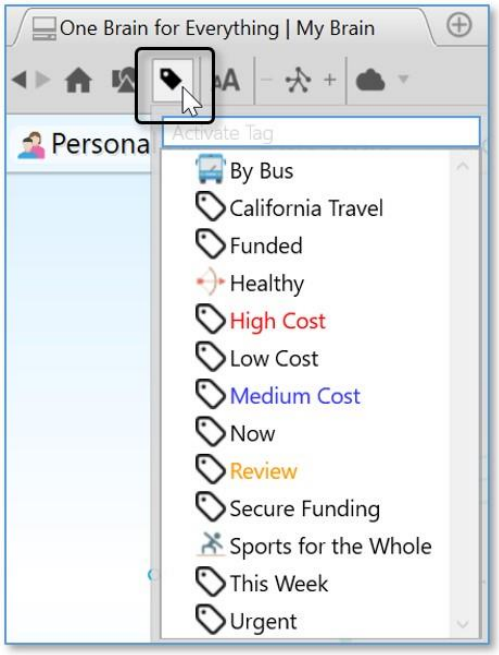



**Figure 142. Opening the Tags List**

2. Either right-click the Thought or click the **Thought** menu, then click the **Delete "Thought name"** command. You can also open its **Thought Properties** dialog box, click the menu button, then click the **Delete "Thought Name"** command.

**To delete multiple Tags at one time:**

1. Click the **Tags** button on the toolbar to display all Tag names in your Brain.
2. **Ctrl**-click each Tag you want to delete. The Tag is added to the **Selection** tab to the left of the list.

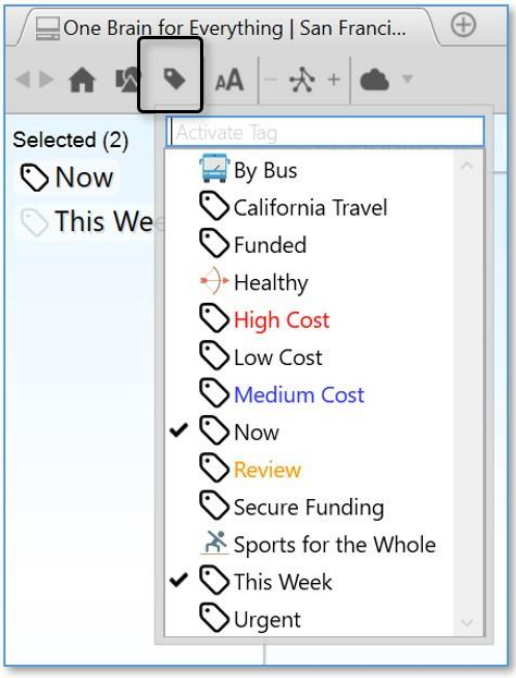



**Figure 143. Deleting Multiple Tags List**

3. When all the Tags you want to delete are selected, right-click in the Selection tab, then click the **Delete (#) Thoughts** command. (Remember that Tags are also Thoughts themselves.)

Unlike normal Thoughts, Tags cannot be forgotten and remembered. Deleting a Tag removes it from your entire Brain permanently.

### Renaming and Adding Attributes to a Tag

1. Click the **Tags** button on the toolbar, click the Tag of your choice, then click the Tag Thought to open its **Thought Properties** dialog box.

2. You can make the same customizations as you can to any Thought while you're in the Tag's **Thought Properties** dialog box. When you're finished making revisions, press the **Enter** key.

Renaming a Tag changes the Tag throughout your entire Brain.

### Displaying Thoughts Based on Their Tags

You can show all Thoughts with the same Tag by using Search:

- Begin typing the Tag name in the Search field, then click the Tag name when it appears. Tags may be indicated with any icon that has been assigned to

them. When you click the Tag name in the Search hit list, all Thoughts assigned to that Tag will be displayed in the Plex.

## Tag Abbreviations

Along with adding icons to Tags and customizing their names with color, you can also attach an “abbreviation” for the full Tag name. Abbreviated forms of the name can serve as hints for what the Tags represent while giving the Plex a cleaner appearance.

In the **Look & Feel** tab of the **Preferences** window, you can change the Tags text setting to “Show always” if you want the abbreviations to show. Hovering over a Thought with Abbreviated Tags or Tag icons will then display the full Tag name.

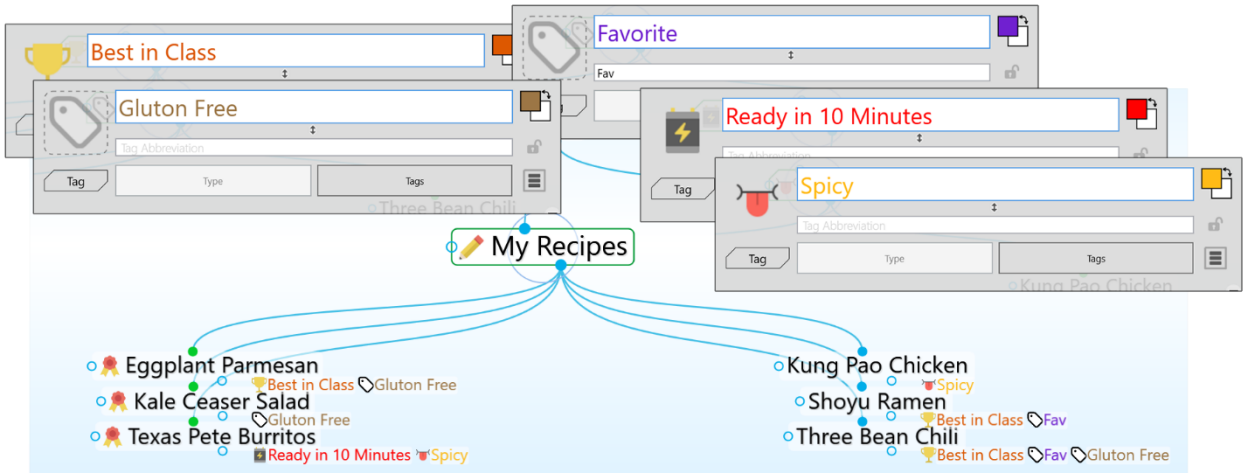



**Figure 144. Tag Icons and Abbreviations**

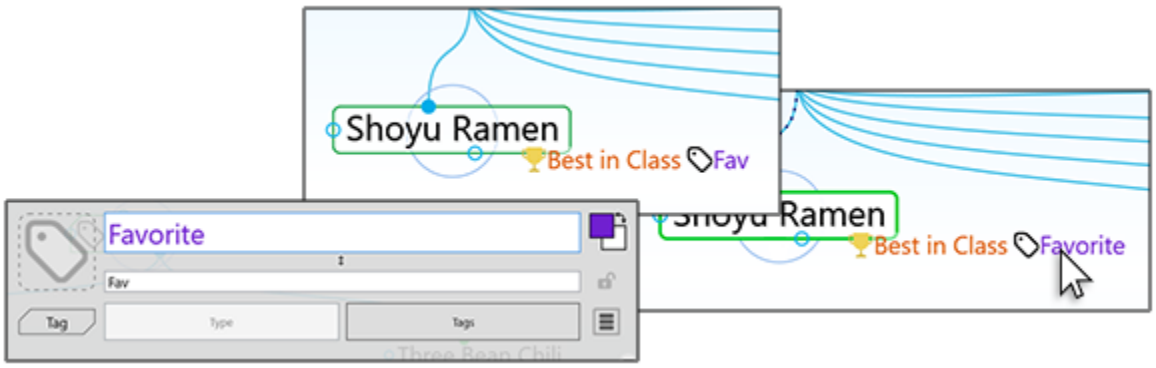



**Figure 145. Pointing at a Thought Hides the Abbreviation and Shows the Full Name**

### To enter a Tag abbreviation:

- In the Tag’s **Thought Properties** dialog box, type the abbreviation in the field below the Tag’s name, then press the **Enter** key.

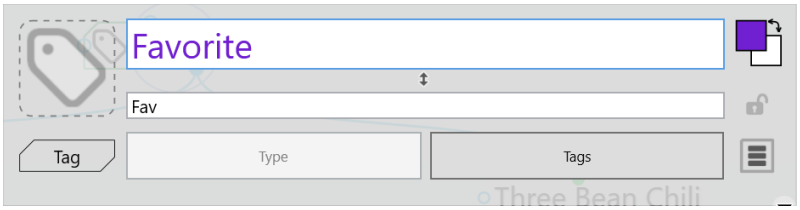



**Figure 146. Creating a Tag Abbreviation**

# Additional Thought Type and Tag Features

## Visible Thought Types and Tags

Types and tags can now be visible in the plex. Want to see a type or tag as 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.

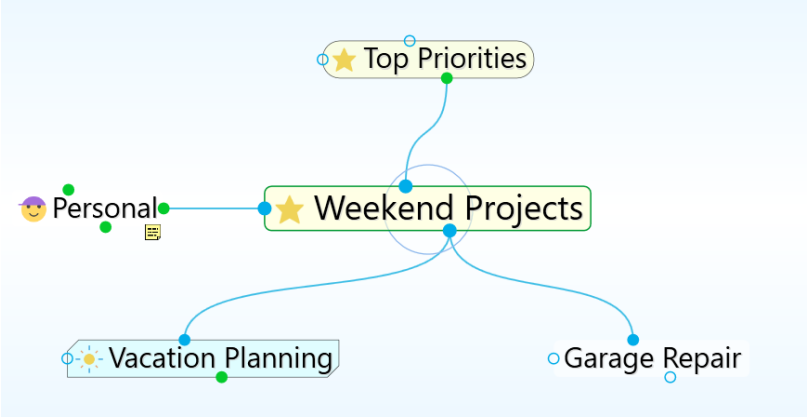



**Figure 147. Visible Parent Type and Child Tag**

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**

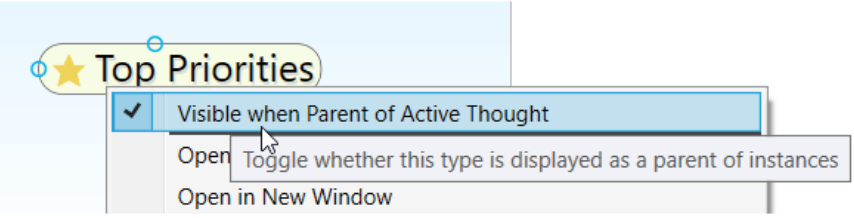



**Figure 148. Toggling the Visibility of a Thought Type**

## Converting to Type or Tag

You 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

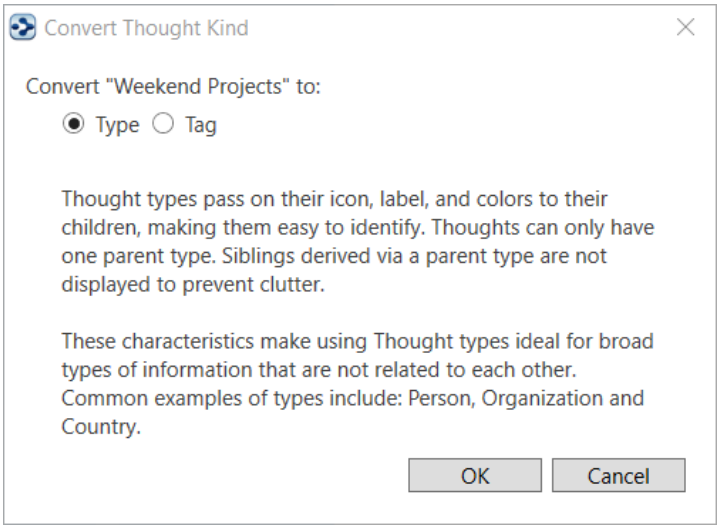



**Figure 149. Convert to Type or Tag**

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

## 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

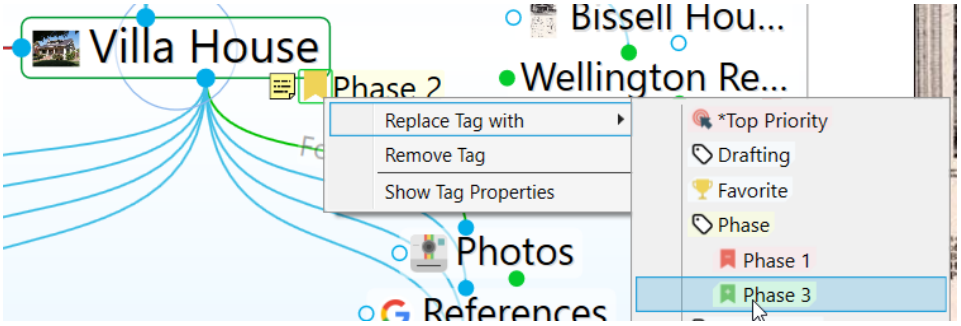



**Figure 150. Replacing a Tag**

## 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

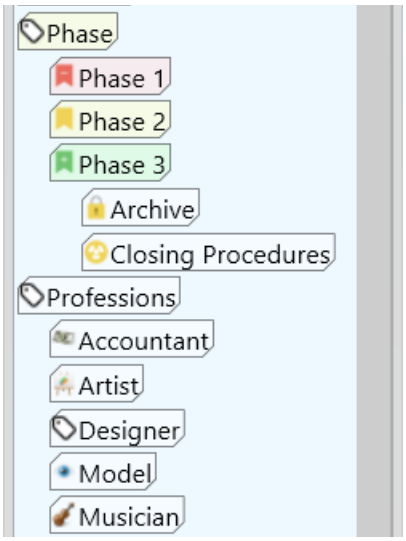



**Figure 151. Nested Tags**

## 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

## Changing the Properties of a Link

Links between Thoughts are normally unnamed. You can name a link by giving it a "label." Just like Thoughts, links can have Types, Notes, and Attachments. You can control the way they appear in order to clarify relationships or just to create a more pleasing view of your Brain, based on your personal preference. You can also manipulate links in order to add or change relationships between your Thoughts.

Just as each Thought has its own **Thought Properties** dialog box, each link has its own **Link Properties** dialog box.

**To open the Link Properties dialog box, use any of these methods:**

- Double-click the link, or
- Click the link once to select it, then a second time to open the box, or
- **Alt**-click the link (whether or not the link is connected to the active Thought), or
- Right-click the link, then click **Properties** on the context menu, or
- Click the link to select it, click the **Link** menu in the menu bar, then click the **Properties** command

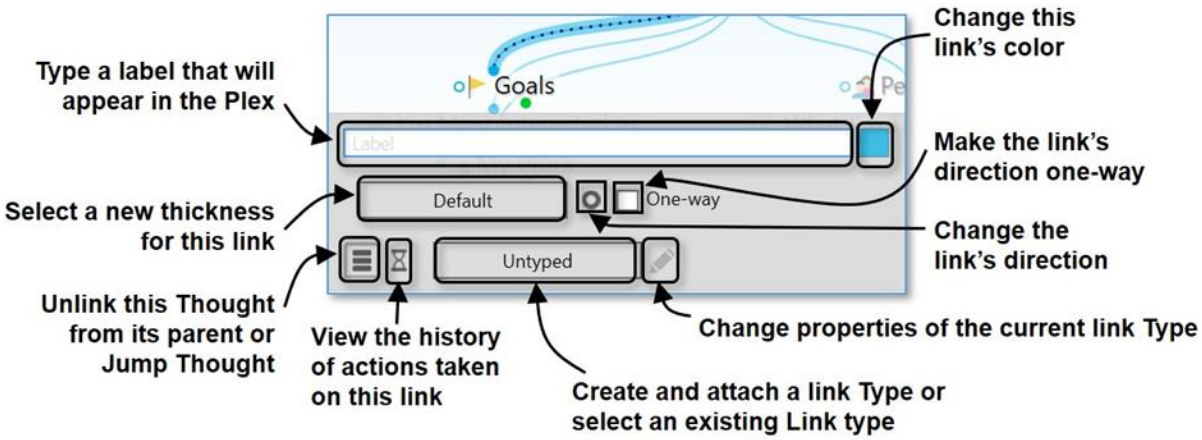



**Figure 152. Link Properties Dialog Box**

**To add a label to a link:**

1. Open the **Link Properties** dialog box for the link, then type a label name in the **Label** field.

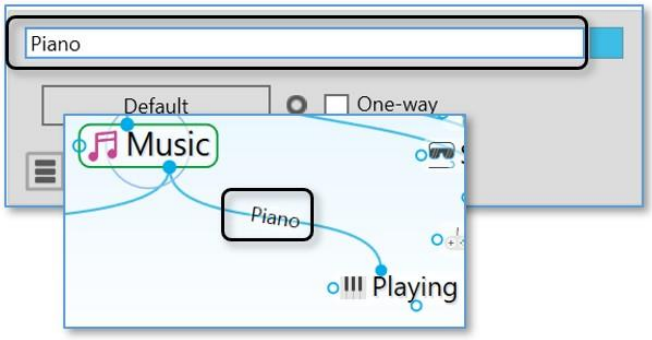



**Figure 153. Adding a Label to a Link**

2. Press the **Enter** key, or click outside of the **Link Properties** dialog box to close it. The label will appear on the link and will be enlarged when the mouse points at the link.

**To change the color of a link:**

1. Open the **Link Properties** dialog box for the link, then click the color box.

2. Click the color of your choice in the color palette, click outside of the palette to close it, then press the **Enter** key, or click outside of the **Link Properties** dialog box to close it.

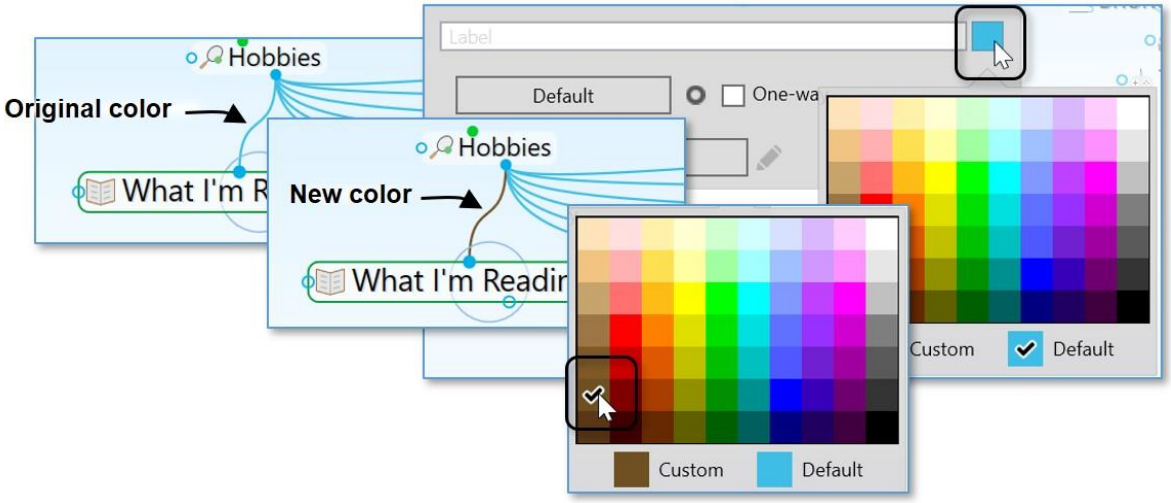



**Figure 154. Changing the Color of a Link**

This changes the color for the individual link. You can set link colors globally in the **Brain Theme** window (please see the Customizing a Theme's Colors section on page 58 for details).

**To change the thickness of a link:**

- Open the **Link Properties** dialog box for the link, click the **Default** button, click the thickness of your choice, then click outside of the **Link Properties** dialog box to close it.

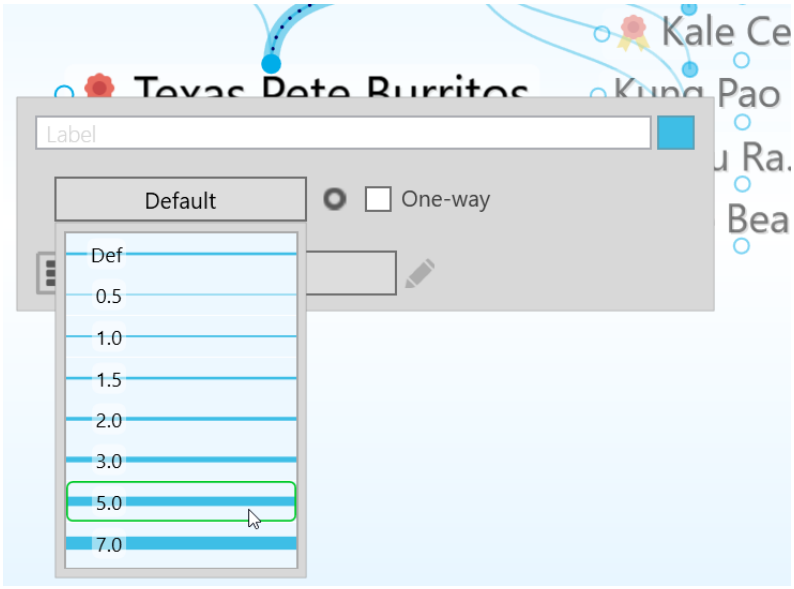



**Figure 155. Changing the Thickness of a Link**

**Tip:** You might want to thicken links to illustrate the strength of particular relationships between Thoughts.

## Link Types

Link types are used to assign commonly-used relationships between Thoughts that share a label, color, and thickness so they can be easily recognized. Link properties and types will be retained even if the two linked Thoughts change their relationship but remain linked (for example, if a child Thought becomes a jump Thought of the original Thought).

In addition to setting their color, you can add labels to link types and you can change the thickness of the link to call special attention to relationships.

1. Open the **Link Properties** dialog box for the link, then click the **Untyped** button.

This button will display “Untyped” if there is currently no Type assigned to the link and it will display the type name if there is already a Type assigned.

2. If there's an existing Type in the list that you want to use, click on it to select it. Otherwise, click on **New Type**, then type the name for the new link in the field that will be displayed.

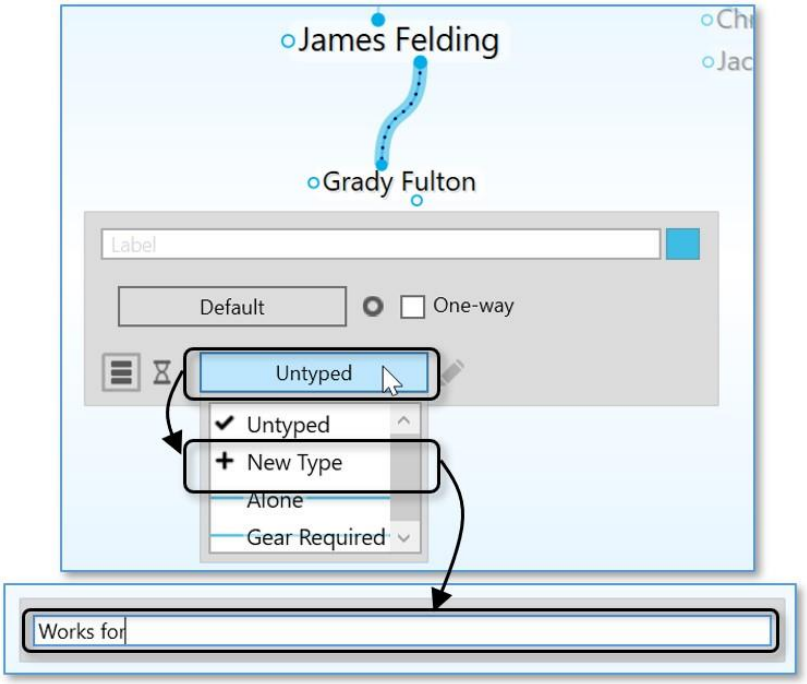



**Figure 156. Creating a New Link Type**

2. Press the **Enter** key to close the **Link Properties** dialog box.

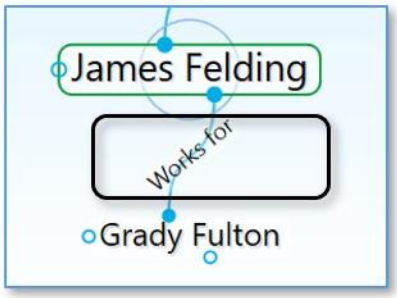



**Figure 157. Appearance of a Link Type in the Plex**

If a Link has both a Type and a label, the *label* will show in the Plex. While the Type won't be displayed in the Plex in this case, it can still be used to find all Thoughts connected to links of that Type.

**Tip:** Point the mouse at a Link Type or label to magnify it in the Plex.

## Deleting Link Types

1. Open the **Link Properties** dialog box for the link that has the Type you want to delete, then click the **Edit** button to open the **Type Properties** box.

2. Click the menu button then click the **Delete** command.

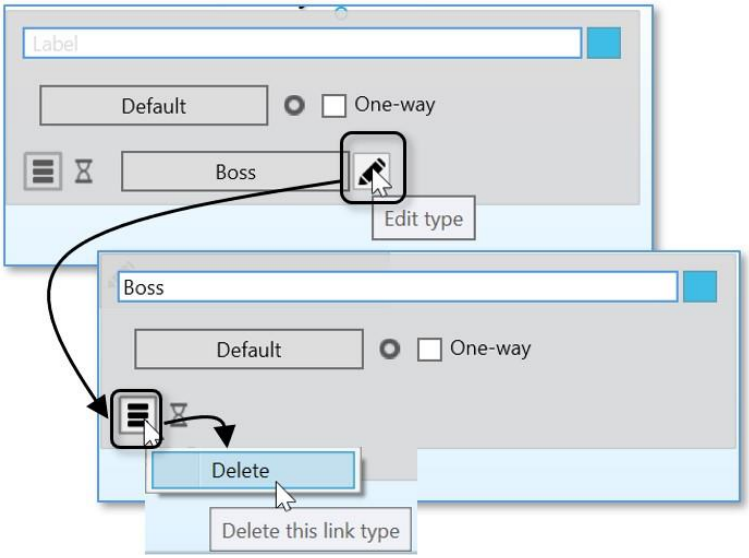



**Figure 158. Deleting a Link Type**

To see how to find Thoughts that share one or more of the same link Type, please see the Running Reports section beginning on page 194.

## Showing Link Directionality

By default, links do not show a directional arrow. You can add directional arrows that will appear on the link that points to or from the source Thought.

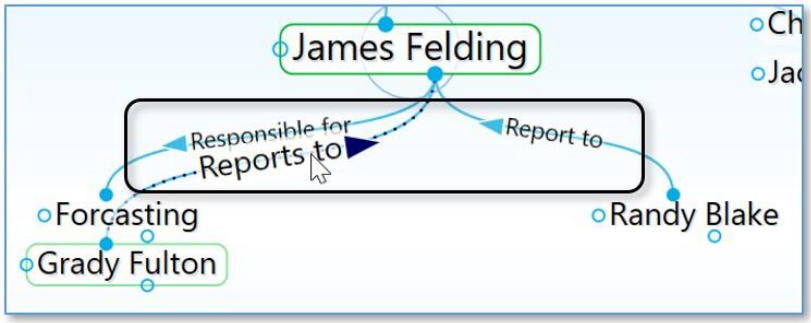



**Figure 159. Directed Links**

- A directed link shows an arrow in the middle of the link. If the link has a label or a Type, the arrow will be next to the text. The arrow is magnified when the mouse hovers on it. Directional arrows can provide visual cues that are particularly useful when there's a link label. For example, for the link label

"Inspired" (shown below), the link's directional arrow shows that "Hank Williams" was a source of inspiration for Elvis. This is also very useful when you want to represent flows between items like financial relationships.

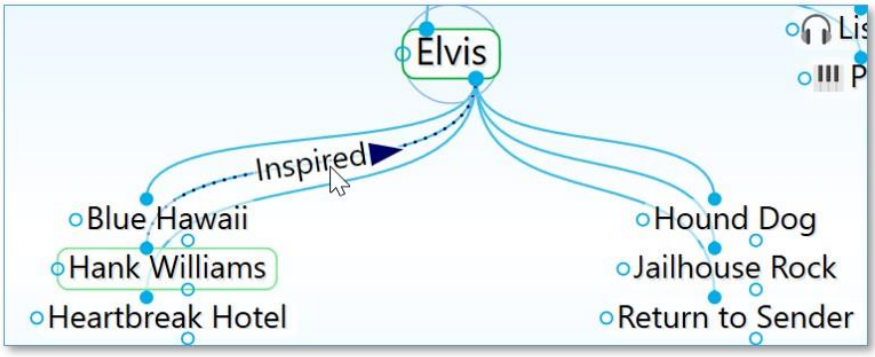



**Figure 160. Hank Williams Inspired Elvis**

**To set link direction:**

1. Open the **Link Properties** dialog box for the link to which you want to add direction. Then:

   - Click the icon to the left of the **One-way** check box to switch between non-directed, directed, and directed in the reverse.

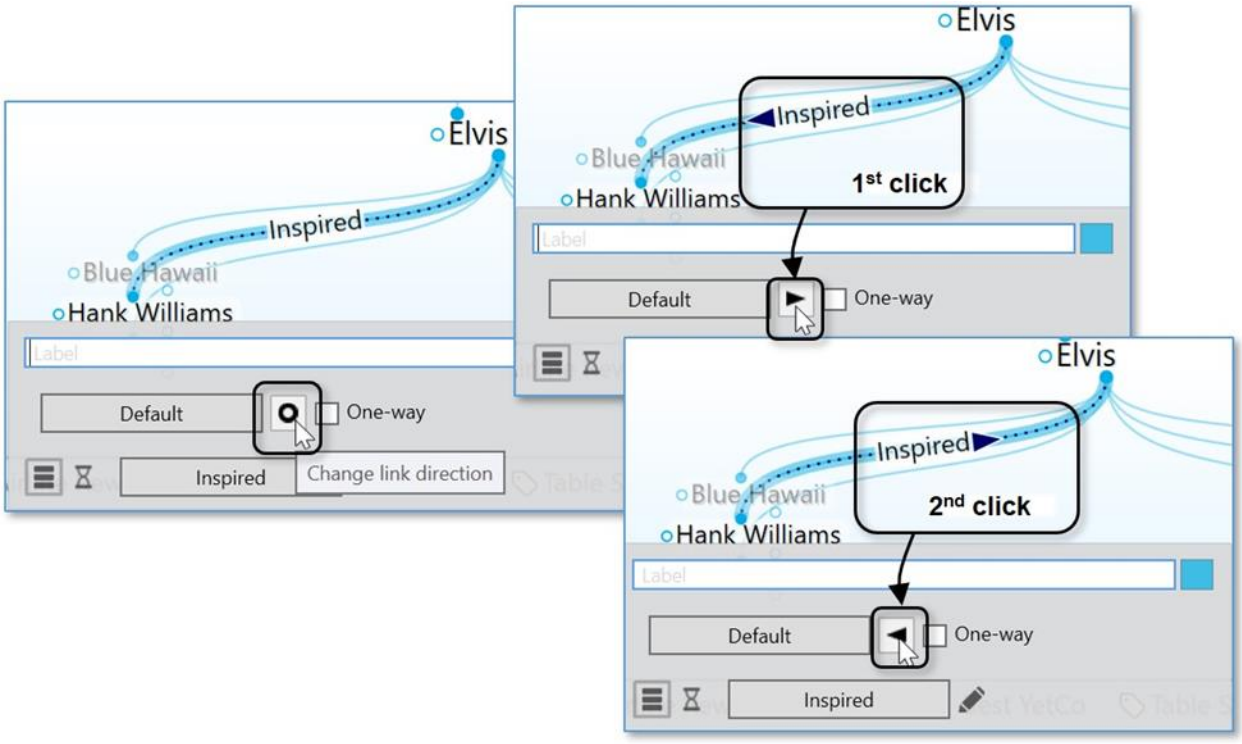



**Figure 161. Setting the Direction of a Link**

## Using One-Way Links

- One-way links appear when the source of the link is active and the source Thought is already visible.
- One-way links are indicated by an arrow with a rectangle at its base.

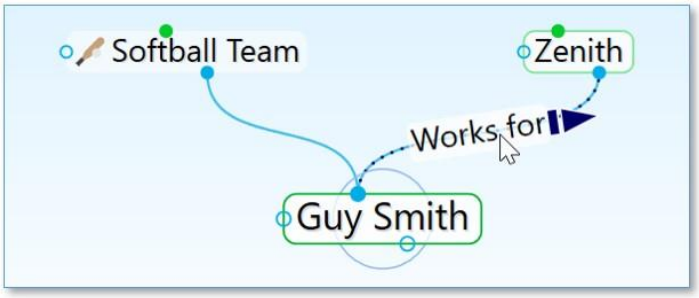



**Figure 162. One-Way Link**

One-way links are useful where *Thought A* is relevant when *Thought B* is active, but *Thought B* is not relevant when *Thought A* is active.

For example, you may want to see what company a person worked for when the person is the active Thought. However, for a large company with thousands of employees, you may not want to see all of the employees when that company is the active Thought. Creating a "works for" link type and making it one-way is a good way to do this.

**To make a Link one-way:**

1. Open the **Link Properties** dialog box for the link to which you want to add direction. Then:
   - Select the **One-way** check box to make the selected link one-way. Note that one-way links cannot be non-directed.

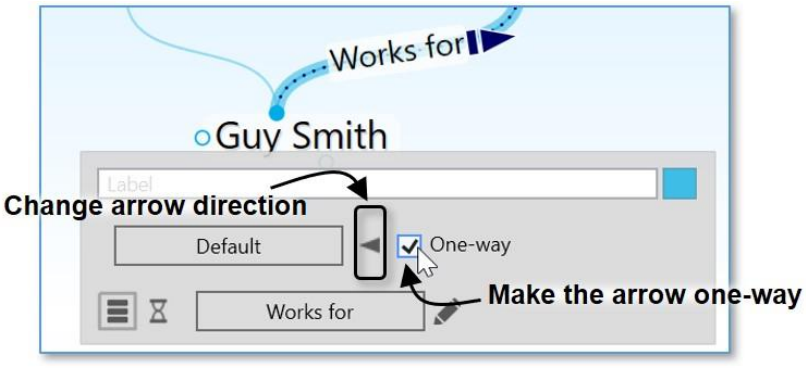



**Figure 163. Selecting Link Direction**

### To set Link direction for link Types:

You can also set link direction for link types. The direction of a link type is inherited by instances of the type and can be overridden by the instance.

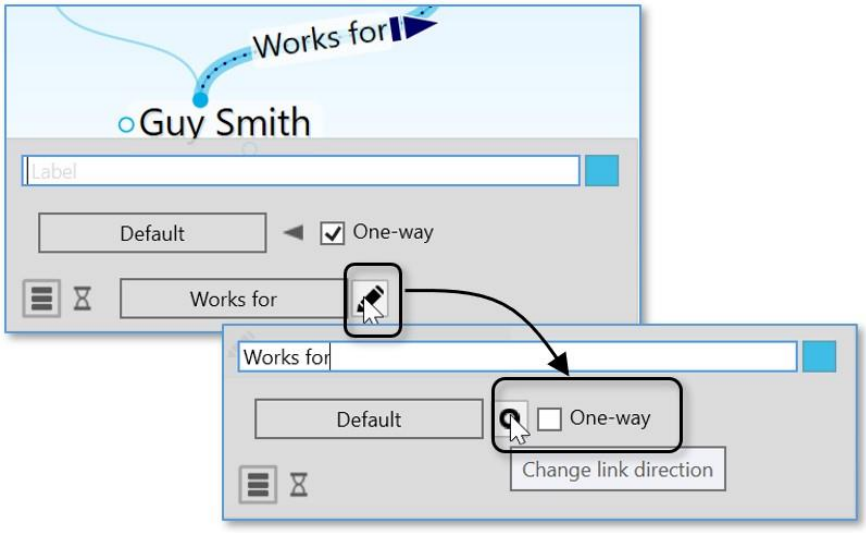



**Figure 164. Selecting a Link Type Direction**

# Advanced Navigation and Alternate Views

## Changing How You View Your Thoughts

There are three views for displaying your Thoughts:

- **Normal view**: For focusing on the active Thought and displaying information pertaining to its parent Thoughts above, child Thoughts below, and jump Thoughts to the left.

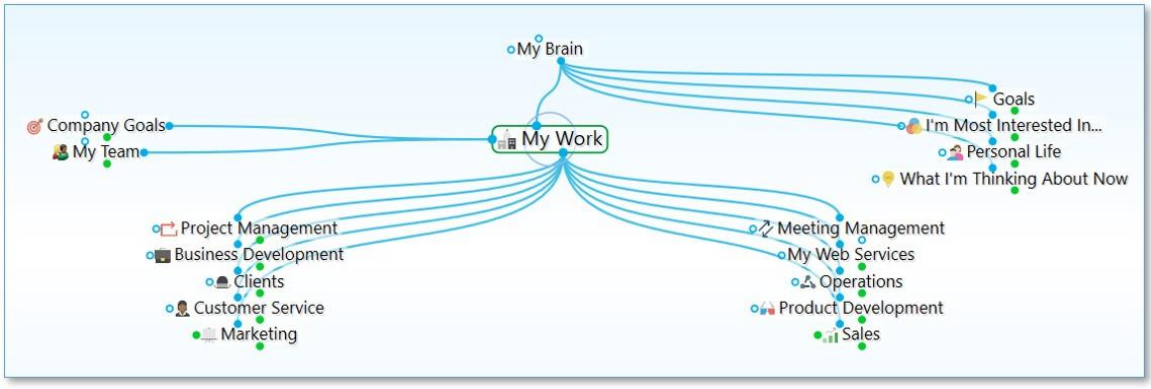



**Figure 165. A Brain in Normal View**

- **Outline view:** For a more expanded, primarily hierarchical view of your Thoughts.

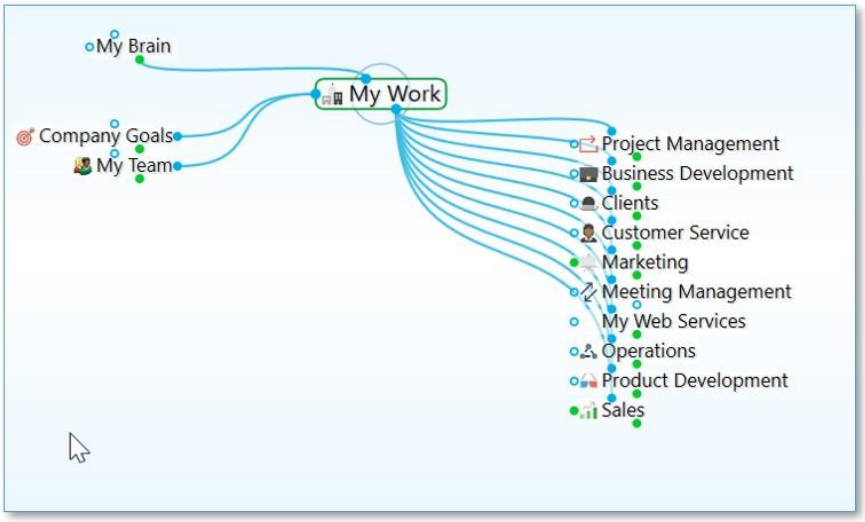



**Figure 166. A Brain in Outline View**

- **Mind Map view:** For a horizontally expanding symmetrical layout.

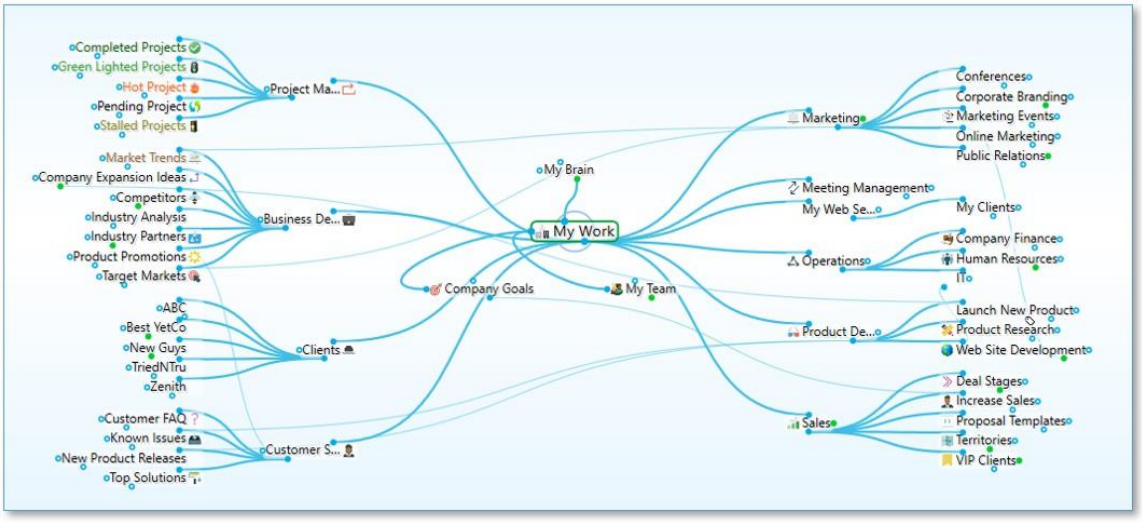



**Figure 167. A Brain in Mind Map View and Expanded**

In addition to selecting a view, you can expand and collapse the display of Thoughts in all views to show more or fewer generations.

TheBrain automatically remembers the last view you used and selects it by default. For example, if you select Outline view and then close TheBrain, the next time you open it, Outline view will be active.

**Three ways to change to a different view:**

- Click the **Layout** button in TheBrain toolbar, then click the view of your choice, or
- Right-click in the Plex, click the **Layout** command, then click the view of your choice, or
- Click the **View** menu in the menu bar, then click the view of your choice

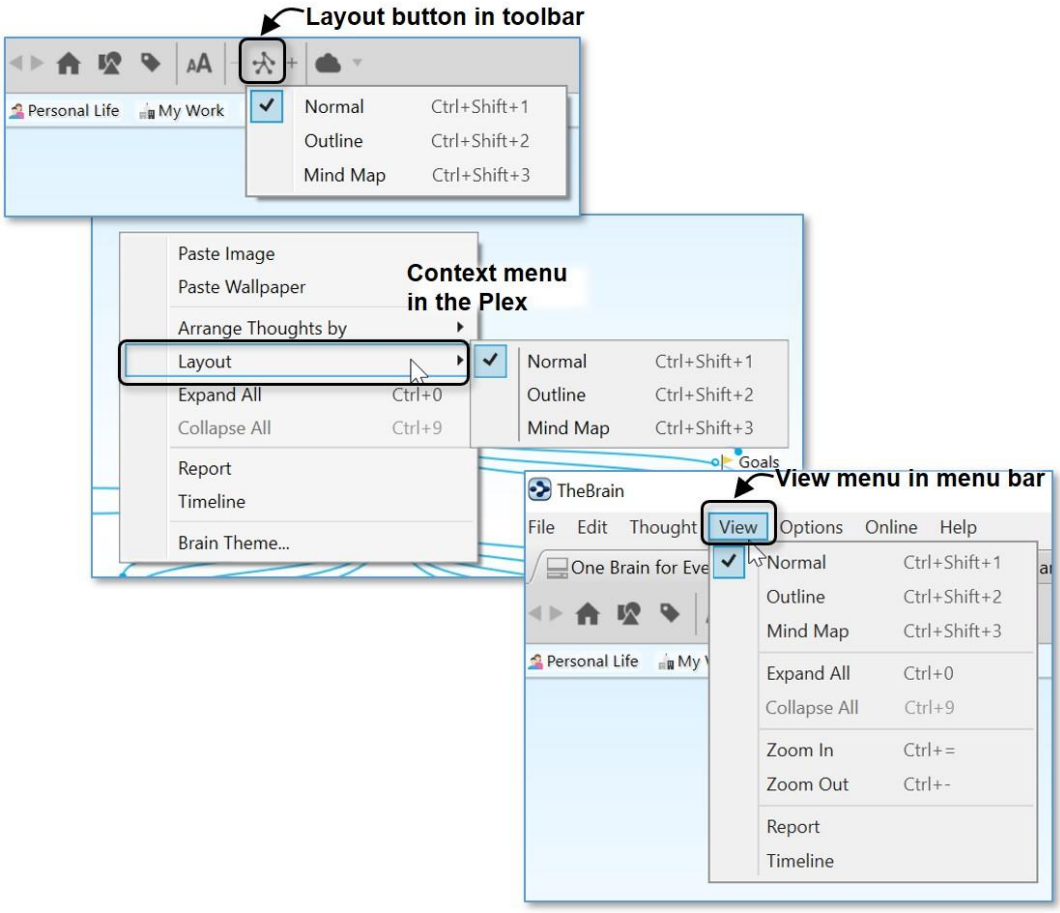



**Figure 168. Three Ways to Select a View**

**Tip:** The check mark in the menu identifies the current view.

A rule of thumb for when you might use each view is to use Normal view when you're creating Thoughts and navigating the Plex, use Outline view when you want to see a more traditional structure, and to use Mind Map view for viewing and analyzing the "big picture."

## Using Outline View

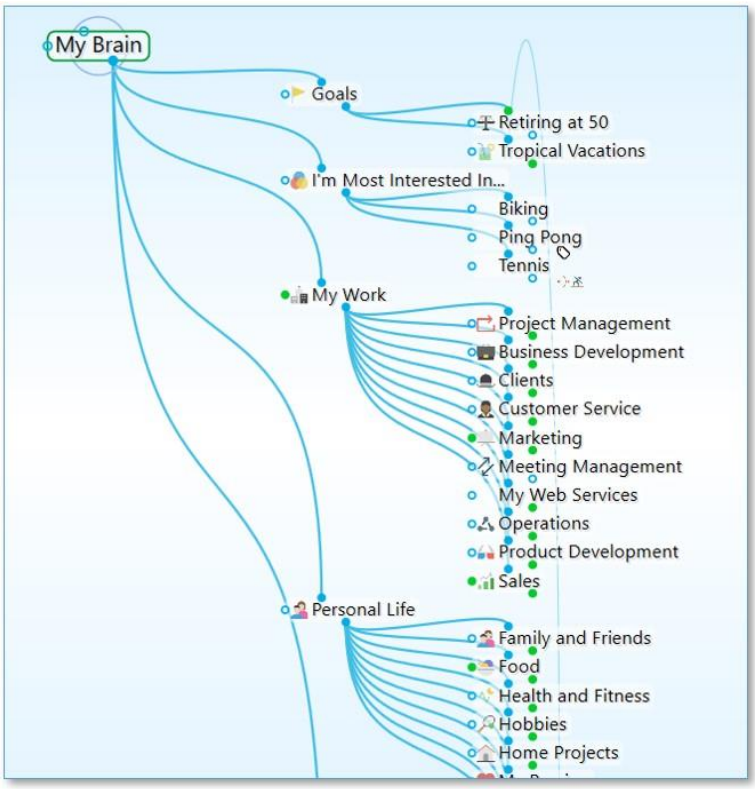



**Figure 169. Plex in Outline View**

Providing a clean, organized way of looking at your Thoughts, Outline view enables a fast, easily understood overview of the active area of your Thought network. The level of detail can go as deep as you want while maintaining an ordered view.

When the Plex is in Outline view, you can show or hide generations of children for individual Thoughts. To see if a Thought has child Thoughts that aren't currently showing, point the mouse at the Thought.

- On mouseover, a plus sign (**+**) icon will appear above the top edge of the Thought's outline if there are child generations to display. Click the **+** icon to expand and show that Thought's children.
- On mouseover, a minus sign (**-**) icon will appear below the bottom edge of the Thoughts' outline if child thoughts can be collapsed or hidden. Click the **-** icon to hide that Thought's children.

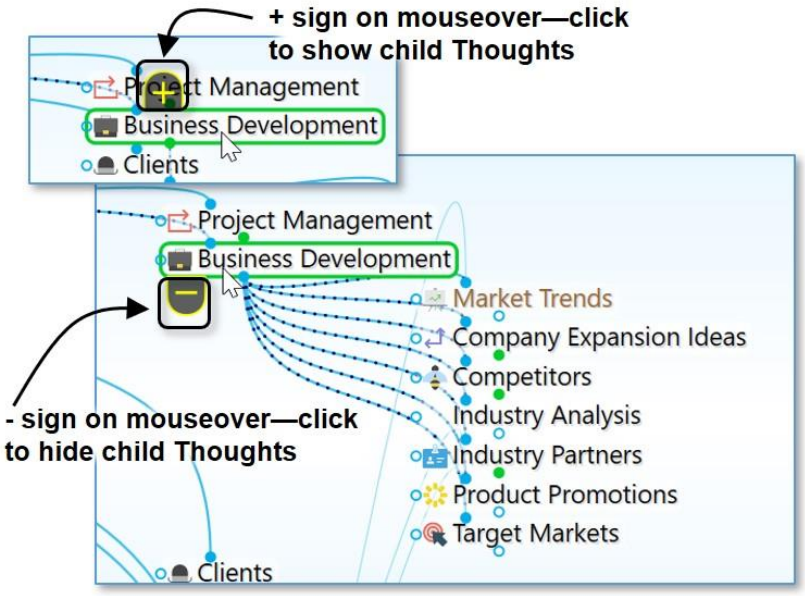



**Figure 170. Showing/Hiding Additional Generations of Individual Thoughts**

## Using Mind Map View

**Figure 171. Mind Map View**

The Mind Map view allows switching the focused Thought without changing the layout for when you want to view and alter various pieces of content while keeping the view mostly static. Traditional mind map layouts can be created instantly from any Thought.

To navigate to another Thought in your Plex while in Mind Map view, right click and select Activate Thought.

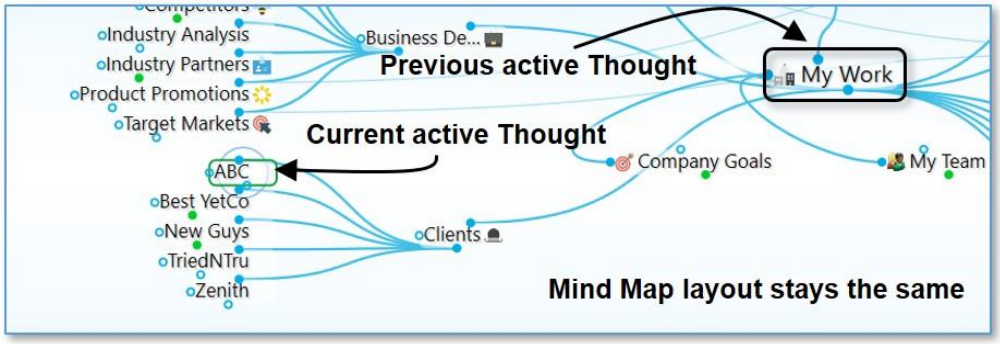



**Figure 172. Changing the Active Thought without Changing the Layout**

As with Outline view, when the Plex is in Mind Map view, you can show or hide generations of children for individual Thoughts by pointing the mouse at a Thought, then clicking the plus sign (+) or minus sign (-) icon to show or hide the Thought's children.

## Expanding and Collapsing Generations

Pro

Besides expanding and collapsing individual Thoughts in Outline view or Mind Map view, as explained in the previous section, you can also expand and collapse generations of all Thoughts in all views.

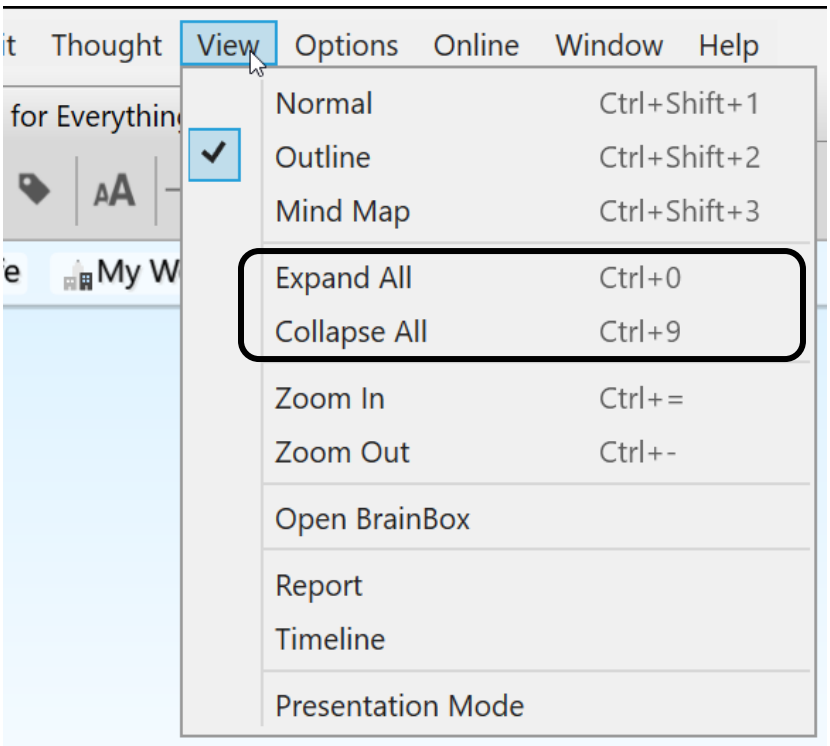



**Figure 173. Expanding or Collapsing from the View Menu**

In Outline and Mind Map view, you can also use the buttons on the toolbar to expand or collapse all visible Thoughts by one generation.

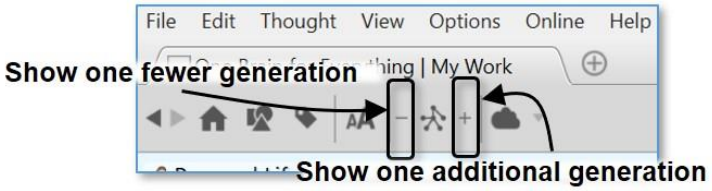



**Figure 174. Expanding or Collapsing by One Generation**

In Normal view, the **Expand** and **Collapse** by one generation on the toolbar work the same way as the **Expand All** and **Collapse All** commands on the **View** menu.

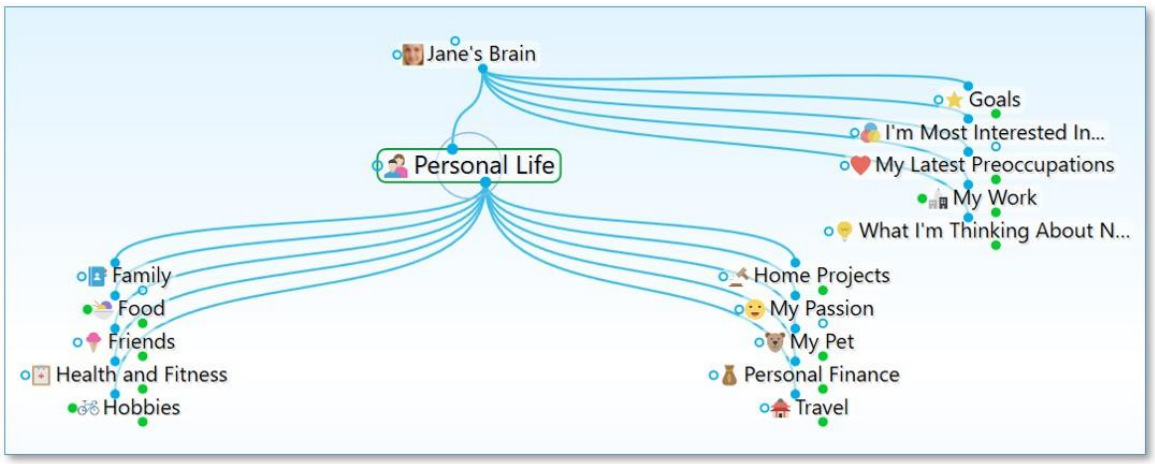



**Figure 175. Jane's Brain in Normal View with All Collapsed**

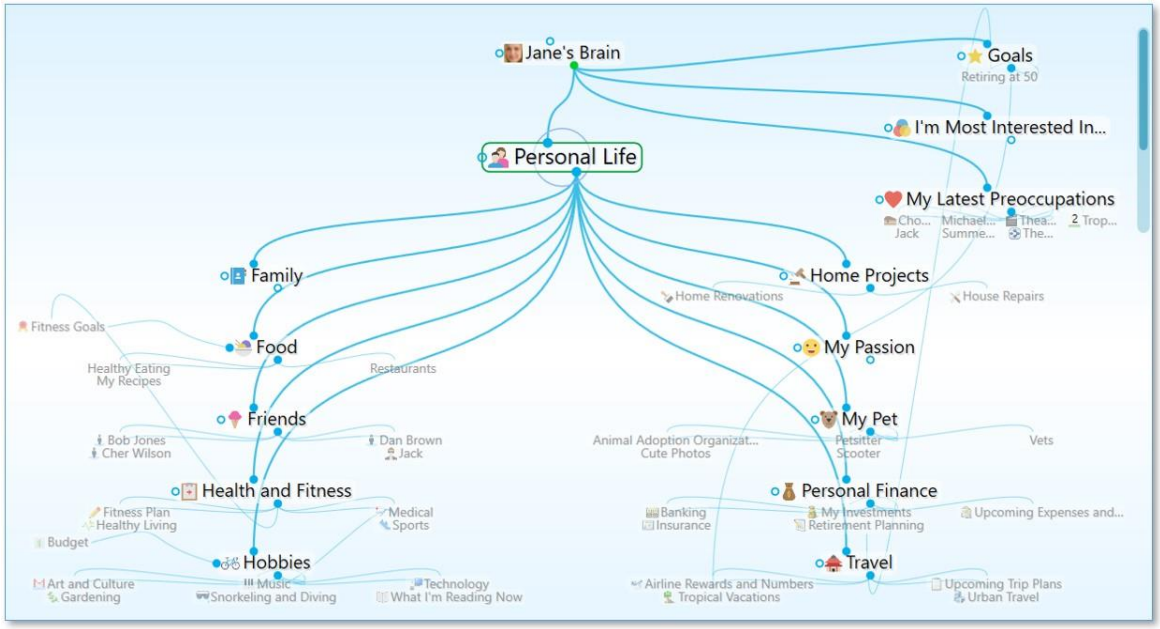



**Figure 176. Jane's Brain in Normal View after Expanding All**

**Tip:** The vertical scroll bar on the right side of the Plex indicates that there are more sibling Thoughts in that area which not currently visible.

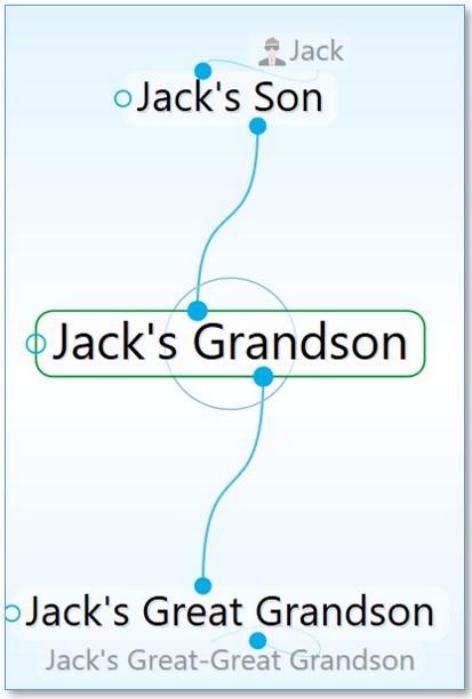



**Figure 177. 5 Generations of Thoughts**

## 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.

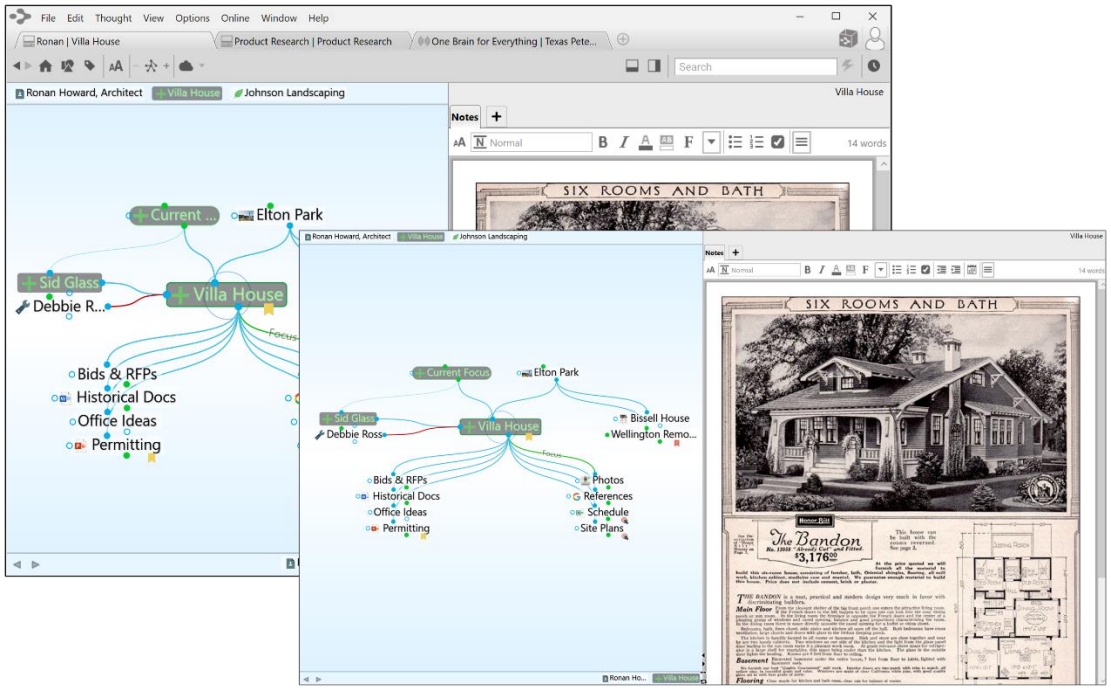



**Figure 178. Before and after switching to Presentation Mode**

# Using TheBrain Content Area

You can think of the parts of TheBrain's Content Area as personal assistants who are ready to help when asked. You can give any of them the day, week, or year off if you choose not to use their services, but they're all standing by, ready to assist you—-at the click of your mouse.

The Content Area keeps all of your Thought-specific notes and attachments. Attachments can be files, web pages, pictures, and more.

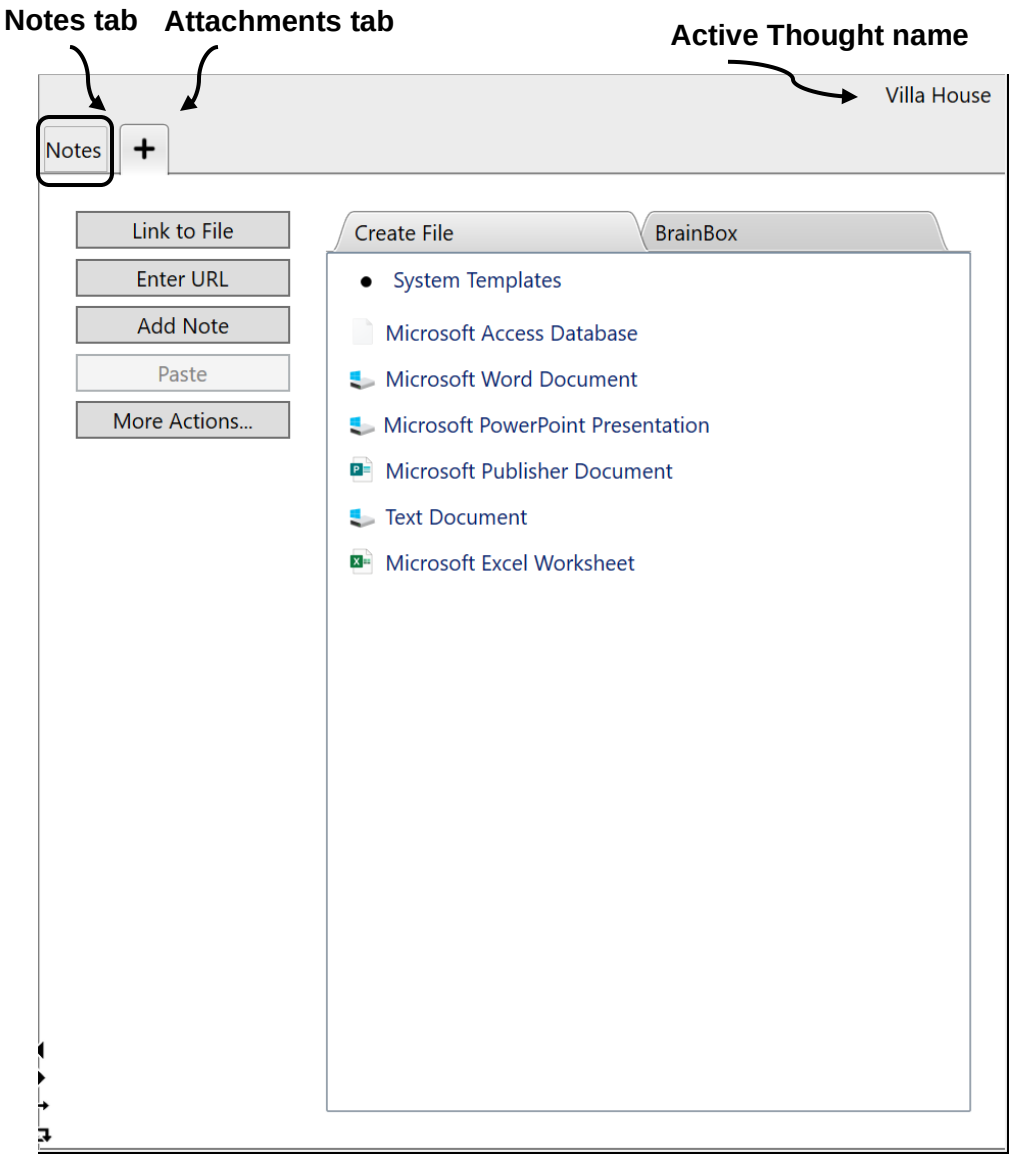



**Figure 179. TheBrain's Content Area**

## Content Area Overview

Here are some handy things to know about the Content Area:

- By default, the Content Area shows content attached to the active Thought. If the active Thought has no content, the Content Area is blank. However, if you want to see the content for Thoughts you point at with the mouse, select the "Update displayed content on hover" option in the **UI** tab of the **Preferences** window. (Please see the Behavior Preferences section on page 74 for more information about setting global user interface preferences.)

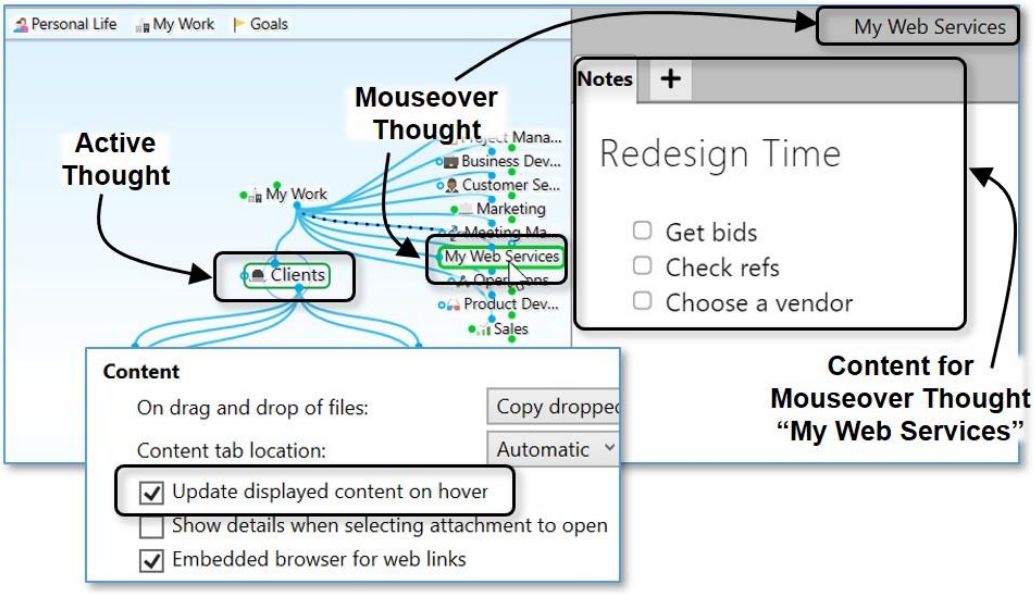



**Figure 180. Content of an Inactive Thought after UI Preference is Changed**

Preferences are global; whatever options are selected when one Brain is active will also be selected in your other Brains. Of course you can change your preferences at any time.

- With one click, you can move the Content Area to any side of the Plex—above, below, left, or right. See the Using Smart Splitter to Arrange TheBrain Window section on page 52 for details. While you're working on content you might find it convenient to maximize the Content Area.

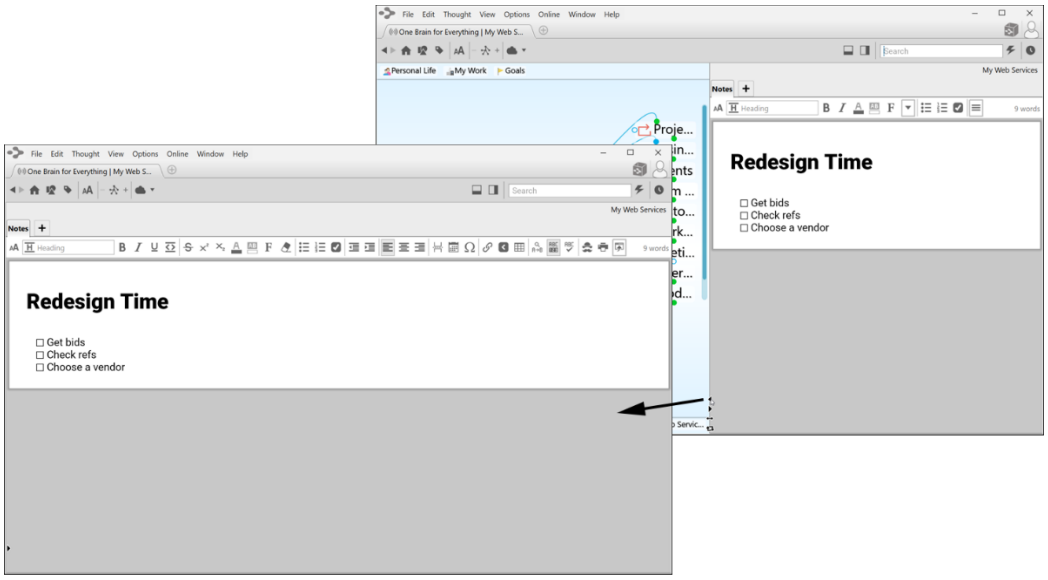



**Figure 181. Maximizing the Content Area**

- The size of the Content Area depends on the size of TheBrain window, but when the Plex and the Content Area are side-by-side, you're in control of how much of the available space each area occupies. Just point the mouse at the line between the two areas and when the double-headed arrow appears, drag left or right to change the proportions.

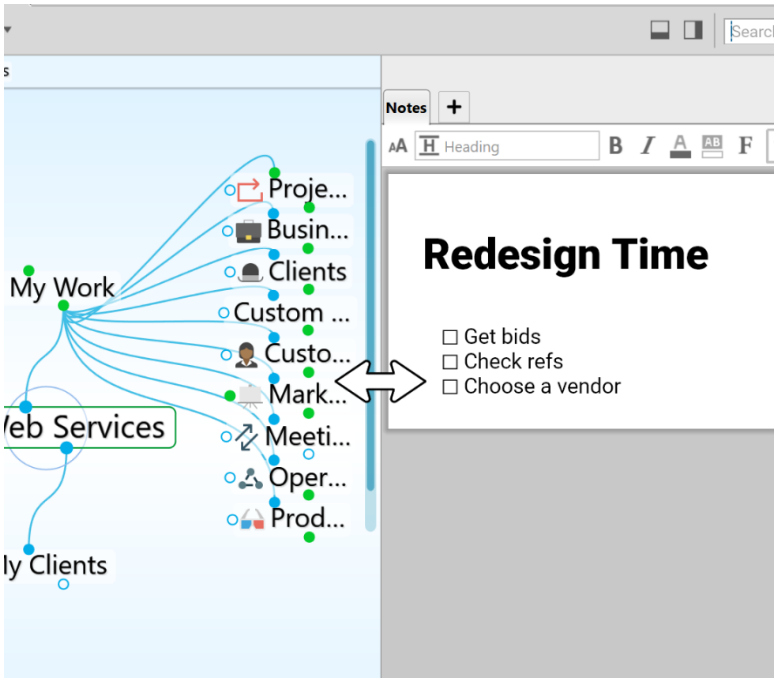



**Figure 182. Making the Content Area More Wide or Narrow**

**Tip:** To work with the Content Area in a separate window, click the **New Window** command on the **File** menu. Then, maximize the Plex in one window and the Content Area in the other. Changes you make in one window will be reflected in the other because you're working with the same Brain, however, the windows won't be in synch. In other words, making a Thought active in one window won't make it active in the other.

## Creating and Formatting Notes

Take a Note, capture your ideas, or create your next literary masterpiece!

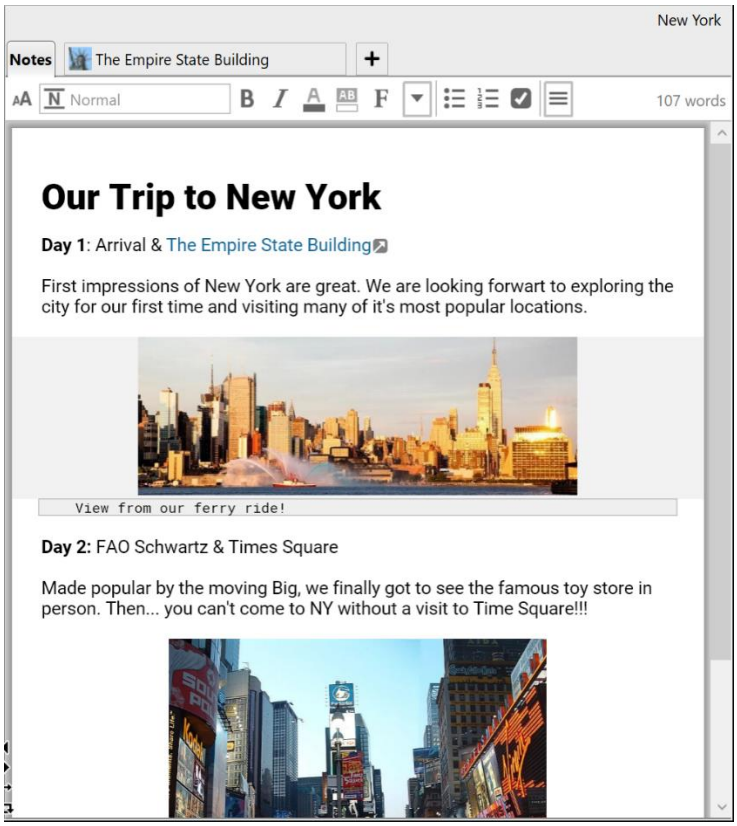



**Figure 183. A Note-Worthy Note**

### The Notes Toolbar

The Notes toolbar is quite robust—don't feel like you have to use every feature for every note. You'll see many of the tools you're familiar with from word processing and email applications. And when you want your note to look "just so" you'll have an excellent array of options at your fingertips.

Depending on how wide you've made your Content Area, you may see the fully expanded toolbar or the compact version. Either way, you'll have access to all tools via buttons providing access to the additional commands. By default, unless

the Content Area is stretched wide, the compact version of the toolbar will be displayed.

**Tip:** To show the expanded toolbar even if the Content Area isn't very wide, deselect the "Use compact toolbars for Notes" check box in the **Notes Editor** tab of the **Preferences** window. (Please see the Behavior Preferences section on page 74 for more information about setting global user interface preferences.)

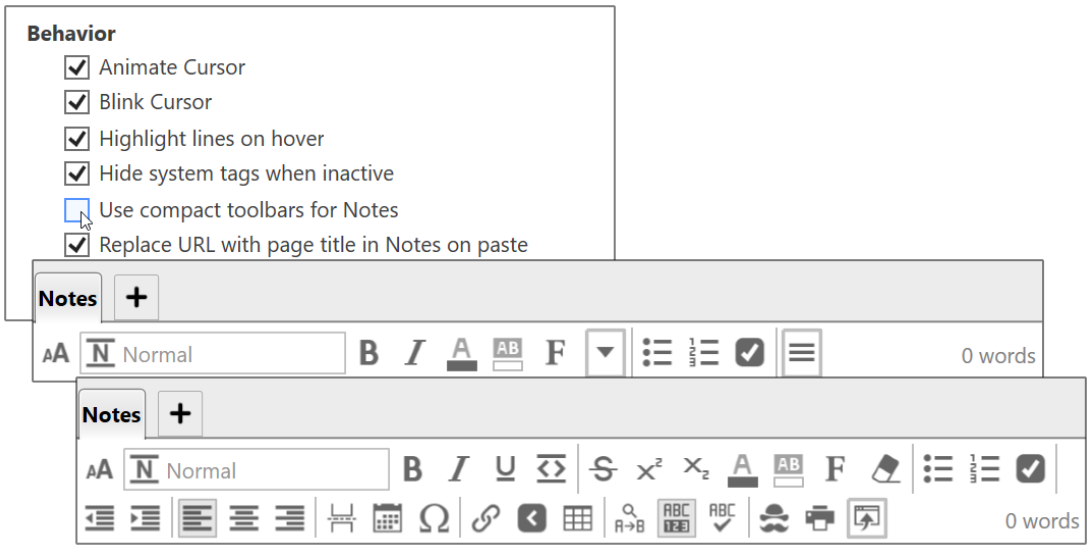



**Figure 184. Compact and Expanded Versions of the Notes Toolbar**

Unlike earlier versions of TheBrain software, the Notes toolbar is always on display, even when the **Notes** tab is visible, but does not have your cursor focus.

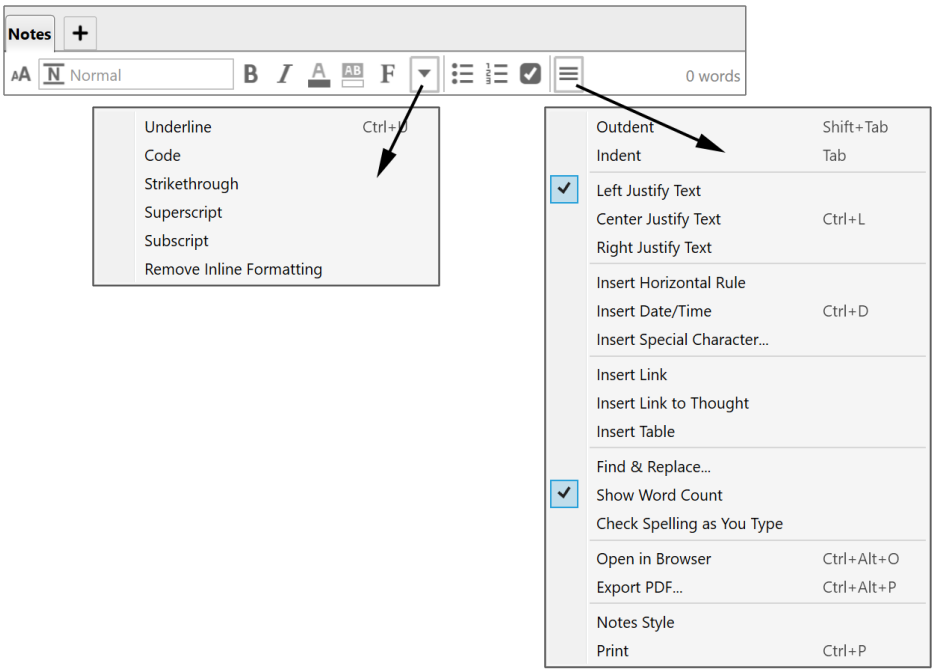



**Figure 185. The Compact Notes Toolbar**

Here are the additional buttons that show when the expanded Notes toolbar is displayed.

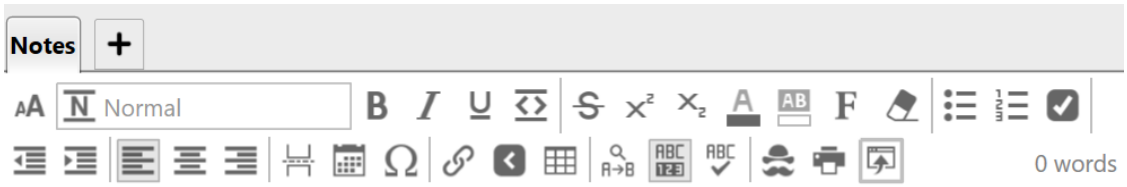



**Figure 186. Additional Buttons on the Expanded Notes Toolbar**

All Notes features are always available no matter which Notes toolbar—compact or expanded—is displayed.

## Toolbar Buttons

Notes Toolbar buttons will allow you to (in order of appearance):

- **Text Size** – Use the text size slider to resize the Notes
- **Paragraph Style** – Choose from
  - Title
  - Heading
  - Sub-Heading

    - Normal
    - Code
    - Unordered List
    - Ordered List
    - Checkbox List

- Bold, Italic, Underline and Code
- Strikethrough, Superscript, Subscript, Foreground Color, Background Color, Font and Remove **Formatting**
- Unordered, Ordered and Checkbox **Lists**
- Outdent and Indent
- Left, Center and Right **Justify Text**
- **Insert** Horizontal Rule, Current Date/Time and Special Character
- **Insert** Web Link, Link to Thought and Table
- Find and Replace, Show Word Count and Spellcheck
- Note Style, Print and Export

### Markdown

Notes in TheBrain 11 are created using a next-generation Markdown editor. This improved version of Markdown enables more capabilities than standard editors for a superior editing experience.

- Unlike other Markdown editors, TheBrain enables direct rendering of formatting, images, and more without requiring a "preview" window.
- Text-based, inline code formatting: Ability to type text that converts into formatting, such as:
    - “[ ] “ (or “- “) to create a checkbox – “+ “ for a pre-checked checkbox
    - ** for bold
    - “* “ at the start of a line to create a bullet list
    - Block quotes using “>“

Toolbar-based formatting: Not familiar with Markdown? A toolbar that works just like you're used to that will also help you learn the text equivalents.

Use the guide below for more clarity on how you can utilize Markdown by typing directly into the Notes:

**Input:**

```
# Title
## Heading
### Sub-Heading
Normal
    Code

**Bold**
*Italic*
_Underlined_

-Strikethrough-
^Superscript^
~Subscript~
:{Red Text:(style="color:#ff0000"):}: and :{Blue Text:(style="color:#6070ff"):}:
Yellow Highlight:(style="background-color:#ffffa0"):
Merriweather Font:(style="font-family:Merriweather"):

* Unordered List
* Unordered List
* Unordered List

1. Ordered List One
2. Ordered List Two
3. Ordered List Three

+ Checked List
+ Checked List
- Unchecked List
- Unchecked List

> One Indent
> > Two Indent
```

*Left Justify*

*:-: Center Justify*

*--: Right Justify*

*Horizontal Rule*

*---*

*Link to [www.thebrain.com](http://www.thebrain.com)*

*Link to [Another Thought](brain://CznU6cG0m0CoFLsUcCnLfg/AnotherThought)*

*Table:*

*|Row 1, Column 1|Row 1, Column 2|Row 1, Column 3|*

*|Row 2, Column 1|Row 2, Column 2|Row 2, Column 3|*

**Output:**

# Title

## Heading

### Sub-Heading

Normal

```
Code
```

**Bold**
*Italic*
Underlined

~~Strikethrough~~
^Superscript^
~Subscript~
Red Text and Blue Text
Yellow Highlight
Merriweather Font

- Unordered List
- Unordered List
- Unordered List

1. Ordered List One
2. Ordered List Two
3. Ordered List Three

- [x] Checked List
- [x] Checked List
- [ ] Unchecked List
- [ ] Unchecked List

```
    One Indent
        Two Indent
```

Left Justify

Center Justify

Right Justify

Horizontal Rule

---

Link to www.thebrain.com
Link to Another Thought

Table:

| Row 1, Column 1 | Row 1, Column 2 | Row 1, Column 3 |
| --- | --- | --- |
| Row 2, Column 1 | Row 2, Column 2 | Row 2, Column 3 |

**Figure 187. Results of Inline Markdown Formatting**

## Entering Notes

To enter a Note, activate the Thought to which the Note pertains, then click in the open area of the **Notes** tab in the Content Area and begin typing. The Notes toolbar will remain displayed whenever the mouse is focused in the **Notes** tab.

Notes are saved automatically when another Thought is activated and will be saved when closing a Brain and prior to an unlikely crash in the application.

You can use all of the standard techniques you use in other text editors when you type, revise, and format TheBrain Notes:

- Automatic word wrap controls line endings. Press the **Enter** key to begin a new paragraph.
- Either apply formatting as you go or select existing text before you apply formatting such as bold, italics, underlining, and color.
- Standard text selection techniques:
  - Drag the mouse through text to select it, or
  - Click at the beginning of the text, then hold down the **Shift** key as you click at the end of the text to select all text in between, or
  - Double-click to select an entire word, triple-click to select an entire line
- To apply formatting to an entire paragraph, such as lists—bulleted, numbered, or check marked—just click anyplace within the paragraph. There's no need to first select the entire paragraph.
- Standard keyboard shortcuts—such as **Ctrl**-C for **Copy**, **Ctrl**-V for **Paste**, and **Ctrl**-A for **Select All**—work as you would expect in Notes. (On macOS, the standard **Command** key shortcuts also work.) You can copy and paste within Notes and between TheBrain and other applications.

One special feature for TheBrain Notes is that if **no** text is selected and you select a formatting command such as bold, highlighting, or change in typeface or font size, the formatting will apply to the entire word in which the cursor is currently blinking.

**Tip:** You can press **Ctrl**-Z (or click the **Edit** menu, then click the **Undo** command) to immediately undo your most recent action in Notes.

## Choosing a Notes Style

You can choose the style of your notes by clicking the **Notes Style** button in the **Notes** toolbar. The style you choose applies globally to all Notes in a single Brain, so you can choose a Notes Style that matches the look of each of your Brains. You can use a different style for each different Brain in TheBrain window.

- To select a style, click in the **Notes** tab, click the **More** button, then click the **Notes Style** command (or just click the **Notes style** button if the toolbar is expanded), then click a style of your choice from the Edit Notes Style window.

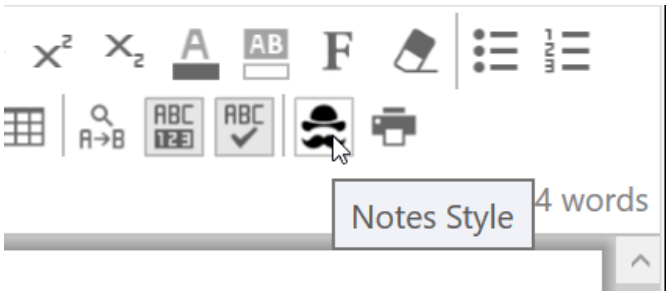



**Figure 188. Setting the Notes Style**

Note Styles also follow a “responsive web design guidelines” approach which is a fancy way of saying that any Note you create will look great whether it is viewed on a 30” monitor or a 4” mobile device.

**Tip:** You can also create your own unique Notes Styles by selecting the **Custom** command and fine-tuning the appearance.

**Figure 189. Appearance of Notes Styles**

Each Note Style has a set of paragraph styles that help you format your notes consistently. If you don’t choose a different paragraph style, the text is automatically attached to a paragraph style named “Normal.”

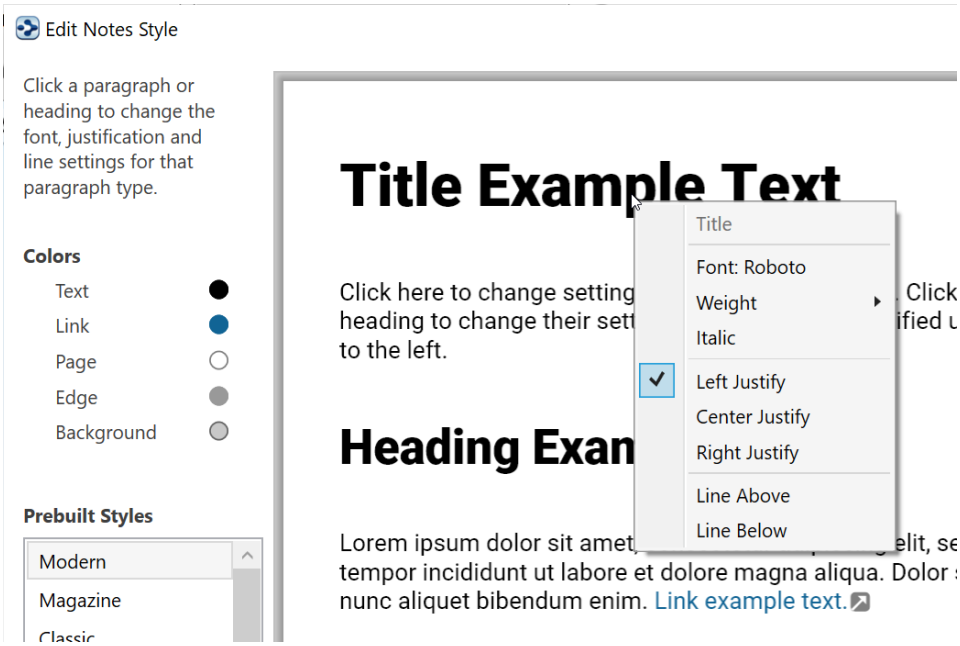



**Figure 190. Paragraph Styles**

Paragraph styles apply to entire paragraphs. To select one, just click anyplace with the paragraph, then click the paragraph style of your choice. If you change to a different Notes Style, the text will change accordingly, based on the paragraph styles you've selected.

## Changing Text Size in Notes

In addition to changing the size of text by choosing different Notes styles and paragraph styles, you can quickly adjust text to a size that is most comfortable for you. It's as easy as clicking the **AA Text Size** button, then dragging the slider up or down!

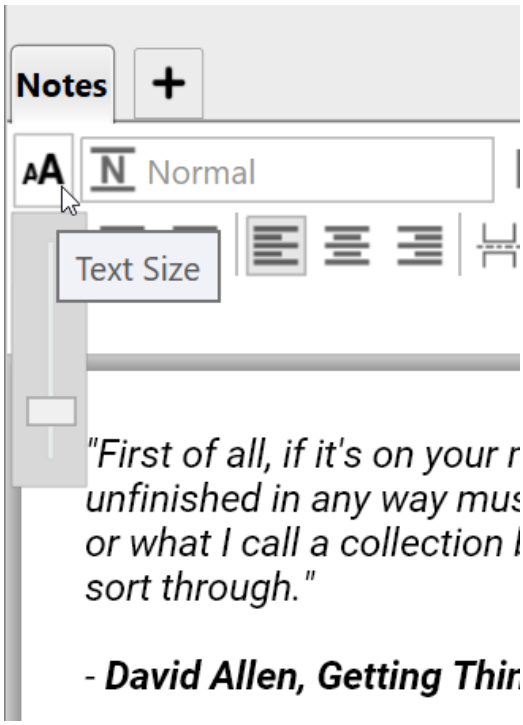



**Figure 191. Slider for Making Note Text Larger or Smaller**

## Paragraph Alignment

Quickly adjust paragraph alignment to left, center or right. Place your cursor anywhere in a paragraph and click on the desired justification.

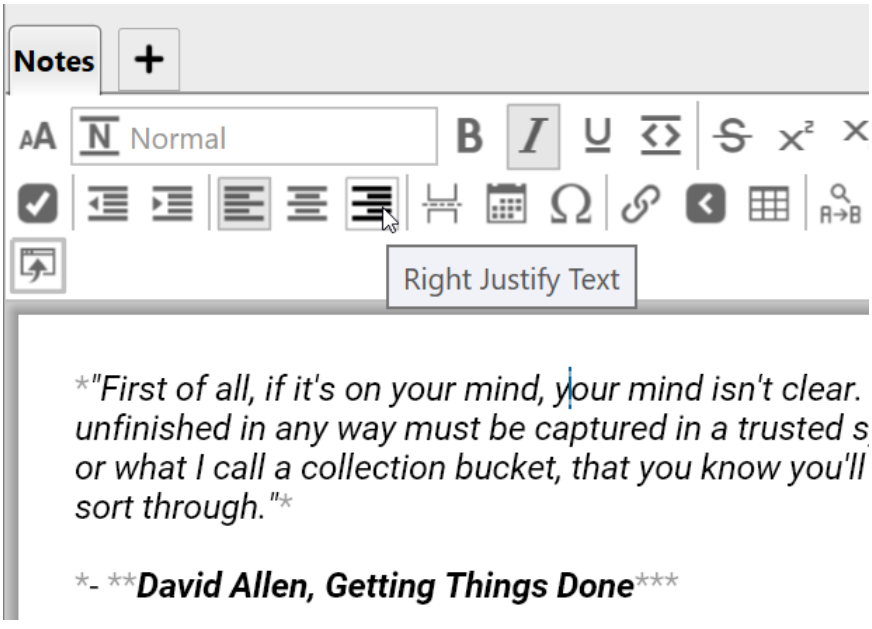



**Figure 192. Paragraph Alignment**

### Custom Font Family for Selected Text

Again, place your cursor anywhere in a paragraph and click on the Font button to select from of over 900 font families. Fonts are consistent across platforms, so your notes will look the same on Windows, macOS and mobile devices

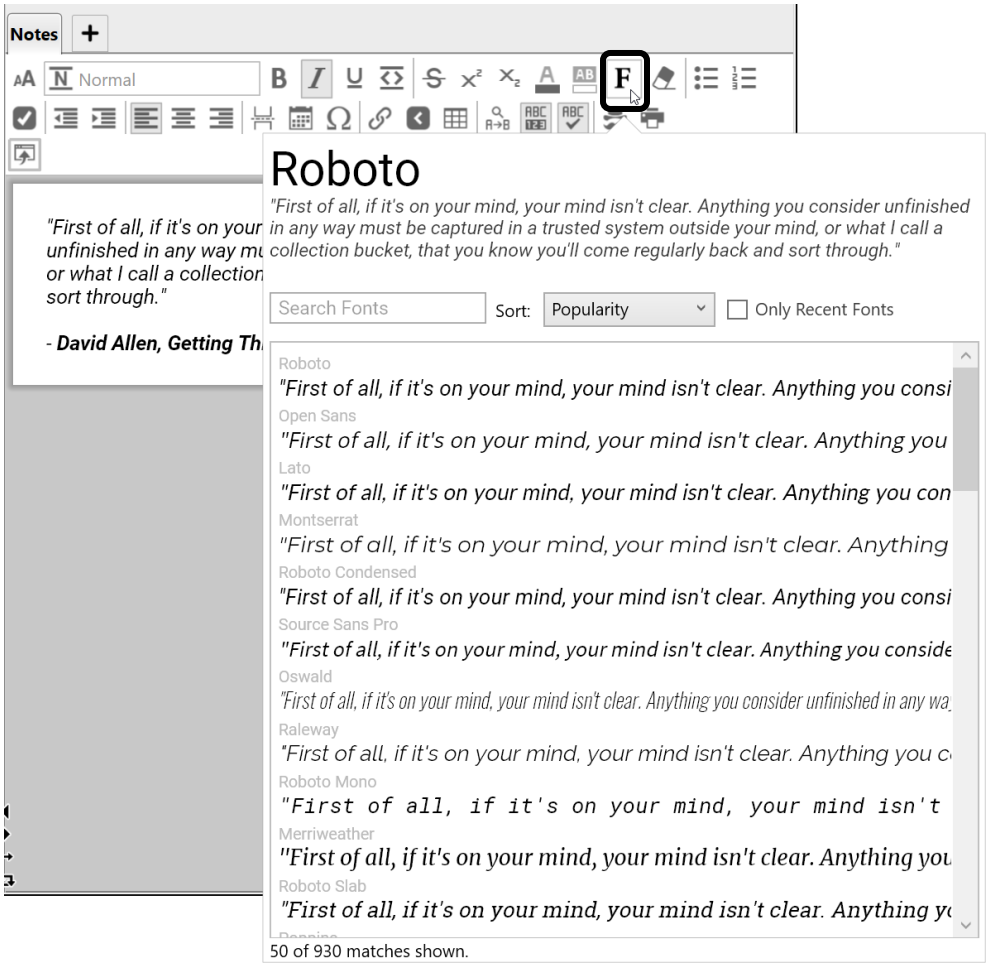



**Figure 193. Fonts**

Move through large sections of the font list using the Next and Previous buttons

### Adding Tables

Create tables inside of notes simply using either the toolbar or the keyboard. To start a new table, type a word or sentence surrounded by pipe symbols, such as: “|this is a new table|”. Tables can include formatting, images, and cells can be right, center or left justified, again, using the Notes toolbar buttons or with markdown formatting.

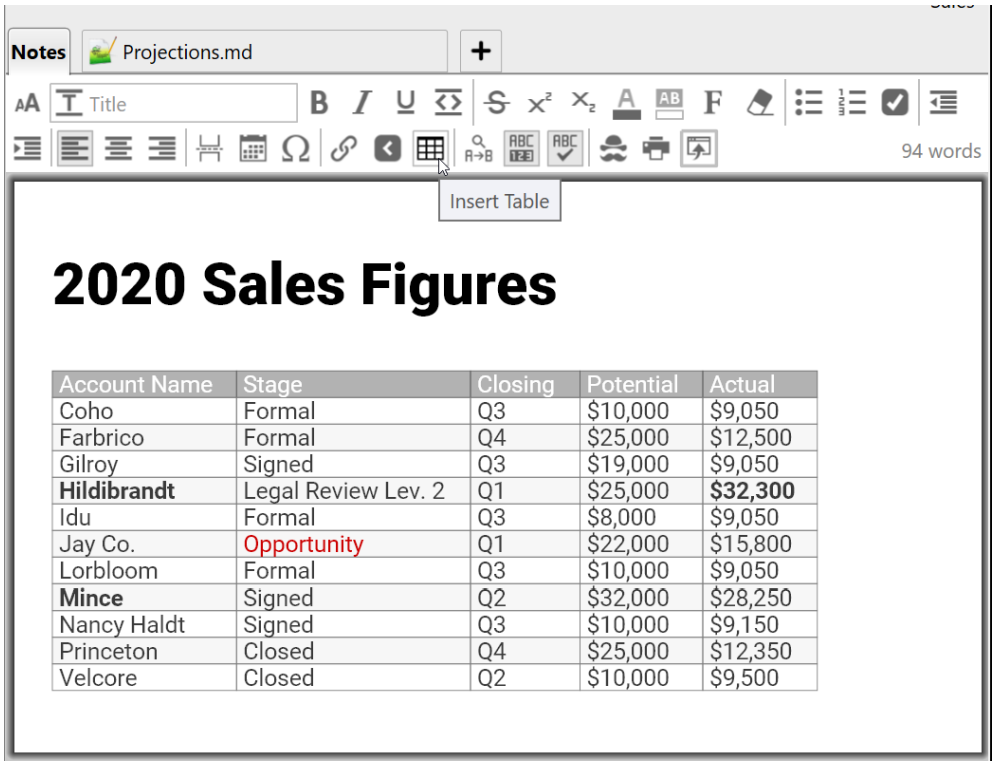



**Figure 194. Note Tables**

Set justification of a table column by adding justification prefix to cell in header row

## Checking Your Spelling

Pro

A spell checker is automatically at work for your Notes. Potential misspellings are automatically highlighted and you can right-click to view suggestions. Click the suggestion of your choice to replace the misspelled word. You can customize the dictionary by adding words to it.

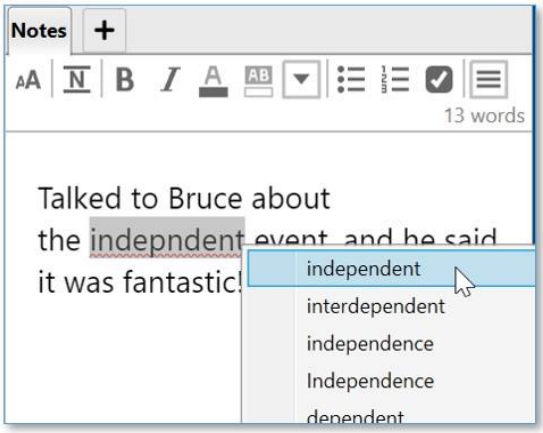



**Figure 195. Spell Checker in a Note**

If you prefer not to see misspellings flagged as you type:

- Click in the **Notes** tab, click the **More** button, then click the **Check Spelling as You Type** command (or just click the **Check Spelling as You Type** button if the toolbar is expanded).

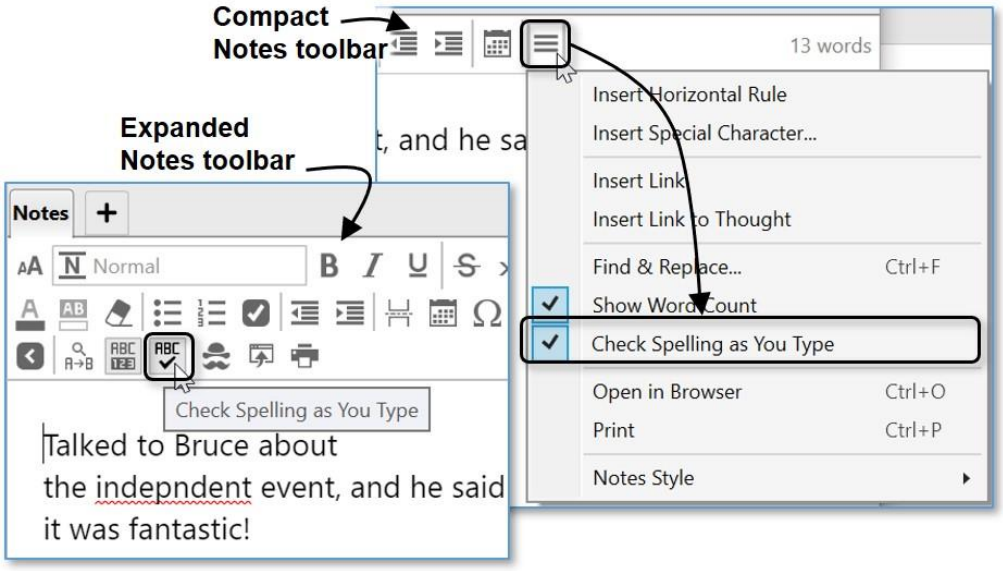



**Figure 196. Disabling Spell Checking**

This is a toggle command. When you want to turn the feature on again, follow the same procedure.

The Real-Time Spellchecking also applies to creating and editing Thought names.

## Inserting Horizontal Rules

You can insert horizontal rules (lines) for organizing Notes into sections visually.

- Click in the Note where you want the horizontal rule to appear, click the **More** button, then click the **Insert Horizontal Rule** command (or just click the **Insert Horizontal Rule** button if the toolbar is expanded).

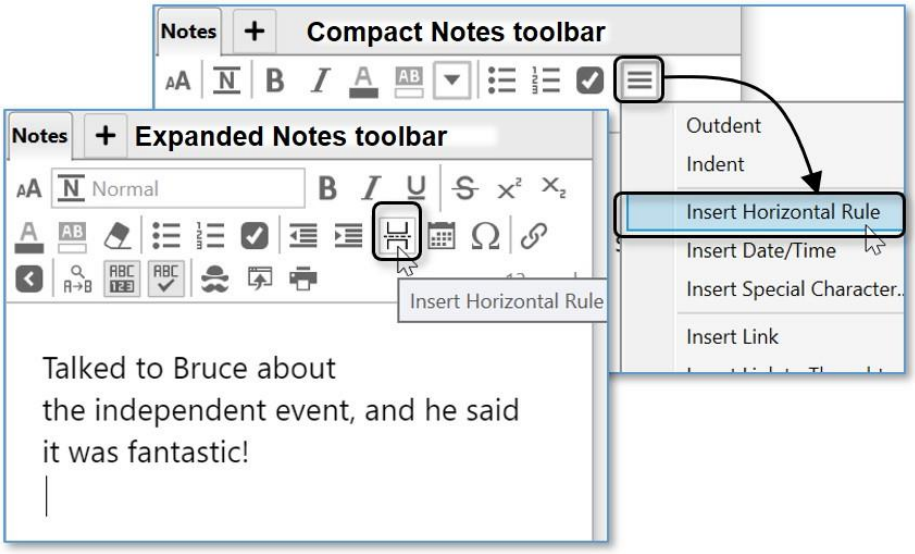



**Figure 197. Inserting a Horizontal Rule**

**To remove a horizontal rule:**

- Click within the rule to select it, then press the **Delete** key. If there is a rule between two paragraphs, the rule will also be deleted if you select and delete the paragraphs before and after it.

## Creating Check Box Lists

You can create a quick check box list and mark the items as complete or incomplete. You can either create the list as you type or turn any existing text into a check box list after you select it.

1. Click in the Note where you want to type the first item to appear, click in any paragraph, or select multiple paragraphs.

2. Click the **Toggle Check Box List** button in the **Notes** toolbar.

3. When a task is complete, click the check box to display a check mark and strike out the text (or click it again to remove the check mark and strike-out if you decide the task isn't complete after all).

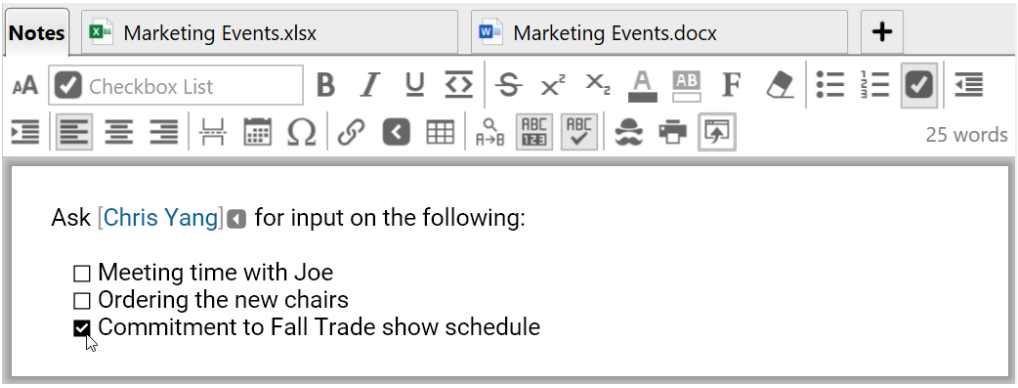



**Figure 198. Formatting Text as a Check Box List**

## Linking to Thoughts in Notes

You can create a link to another Thought so that when you click the link the other Thought will become active.

1. Select desired text or place curser where a new link should appear.
2. Click the **More** button, then click the **Insert Link to Thought** command (or just click the **Insert Link to Thought** button if the toolbar is expanded). Type the name of the Thought you wish to link to.

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

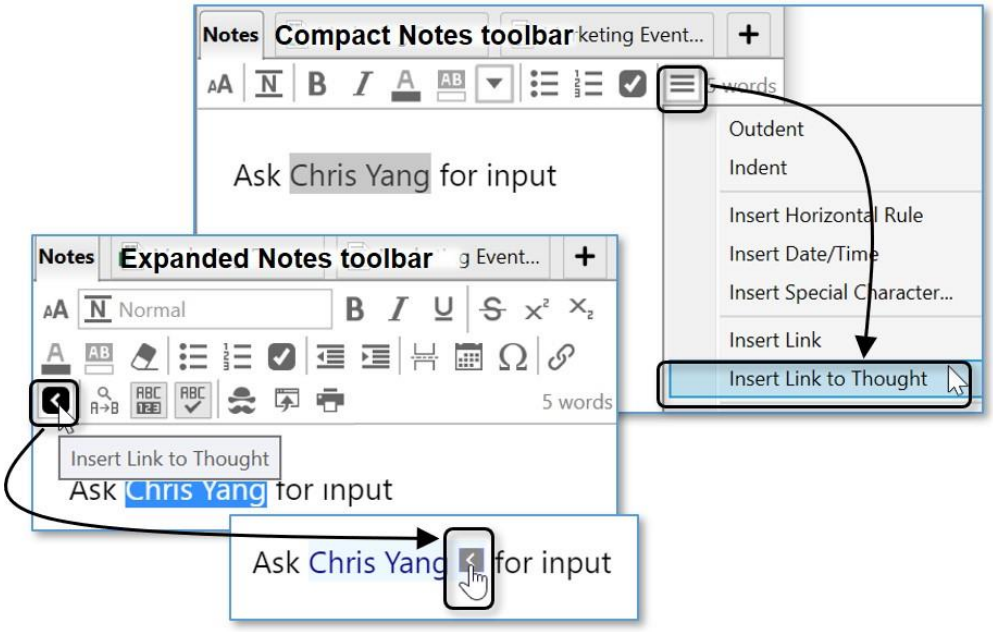



**Figure 199. Inserting a Link to a Thought**

After the link has been created, you can change the text of the link and rename the Thought without breaking the link.

## Creating Quick Web Links

You can add web links to your Brain by using the **Add Attachments** tab in the Content area, but a shortcut is to use the **Notes** tab. Web links can easily be inserted, edited, and identified within your notes for the active Thought. Use any of these three ways:

- Type in the URL, or
- Paste in the URL from the clipboard after you copy it, or
- Drag the URL in from a browser

The web link will be identified and processed automatically.

Videos from YouTube and Vimeo are embedded into Notes in a playable form automatically. Just drag and drop from your browser into your Notes.

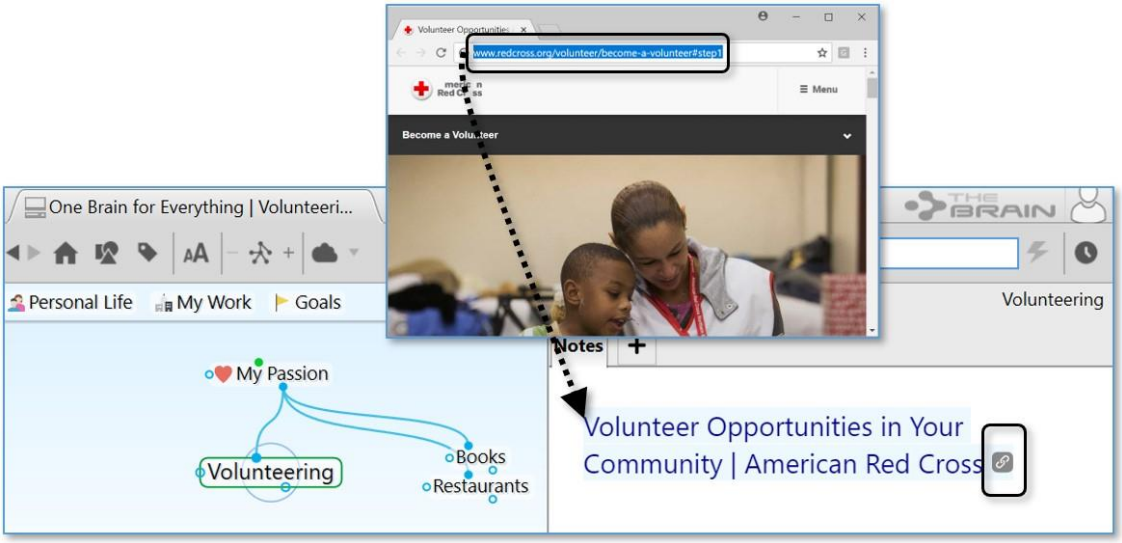



**Figure 200. Dragging a Web Link into a Note**

- The URL will be replaced with the title of the page it links to—and you can easily edit the title by clicking within it and using standard typing and deleting techniques. If you delete the link icon, the connection to the URL will be broken.

**Figure 201. Revising Link Text in a Note**

Notes style and formatting will be preserved if you copy and paste a note's content from one thought into another. To easily copy an entire note, right click anywhere inside the Note to use the **Select All** option.

From the Note's context menu, you can also select Copy as Text or Copy as HTML for pasting into other applications.

## Find and Replace in Notes

Click the Find & Replace button in the Notes toolbar to open the Find & Replace banner. Type the desired search criteria in the Find field and the replacement text in the Replace field. Use the arrow keys to preview. All matches to the Find field will be highlighted in the Note. Use the Replace button to replace specific instances one at a time, or the All button to replace all instances of your search criteria.

Your cursor will remain on the current selected highlight when the Find/Replace banner is closed.

The Find field can be used independently, without content in the Replace field if you are just looking for specific text to be highlighted within a long note.

## Additional Note Features

### Word and Character Count

All Notes will display their word count in the right hand corner of the Notes Toolbar. Hovering over the word count for each individual not will display the character count of that Note.

### Search Web from Notes

Select any text in your note and press F4 on your keyboard (or your customized Web Search keyboard shortcut) to open the Web Search window, pre-populated with the selected text.

### Delete By Word

Note supports keystrokes to delete by word, rather than one character at a time:

- **Ctrl+Backspace** = Delete to start of current word (equal to Ctrl+Shift+Left, Backspace on macOS)
- **Ctrl+Delete** = Delete to start of next word (equal to Ctrl+Shift+Right, Delete on macOS)

### Edit Link Context Menu Commands

Once a link has been added to notes, you can now right click on it to edit it. If the link is a URL, you can edit its text. If the link is to a thought, you can search for and select a different thought.

### Resizable Images and Videos

Images and videos that have been pasted into a Note can easily be resized. Click on the image or video to highlight it. Each image will have eight resizing points. Click and drag on any resizing point to resize the image.

### Copying Images from Notes

When a picture in a Brain Note is copied (right click on picture in Notes and select `Copy`), pasting into Paint or Word will paste the image itself.

Pasting into notepad or some other text-only application will paste the markdown text that references the picture.

Additionally, you can right click on an image in a Brain Note and select Copy as Image.

### Printing Notes

To print the active Note press **Ctrl**-P, click the **More** button, then click the **Print** command (or just click the **Print** button if the toolbar is expanded). The **Print** dialog box will open and you can fine-tune your print request.

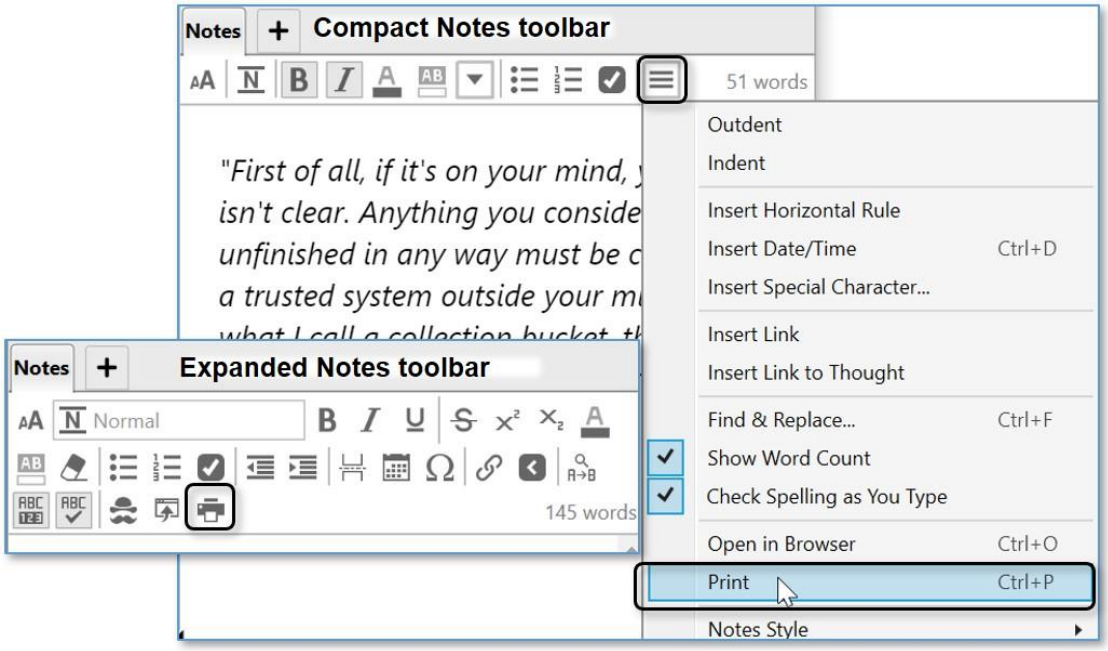



**Figure 202. Printing a Note**

Pro

## Adding Attachments to Your Thoughts

In addition to Notes, each Thought in your Brain can have content associated with it such as web pages and a multitude of files attachments. You can drag and drop attachments, create attachments from scratch, and use any of the other attachment options in the **Add Attachment** tab of the Content Area.

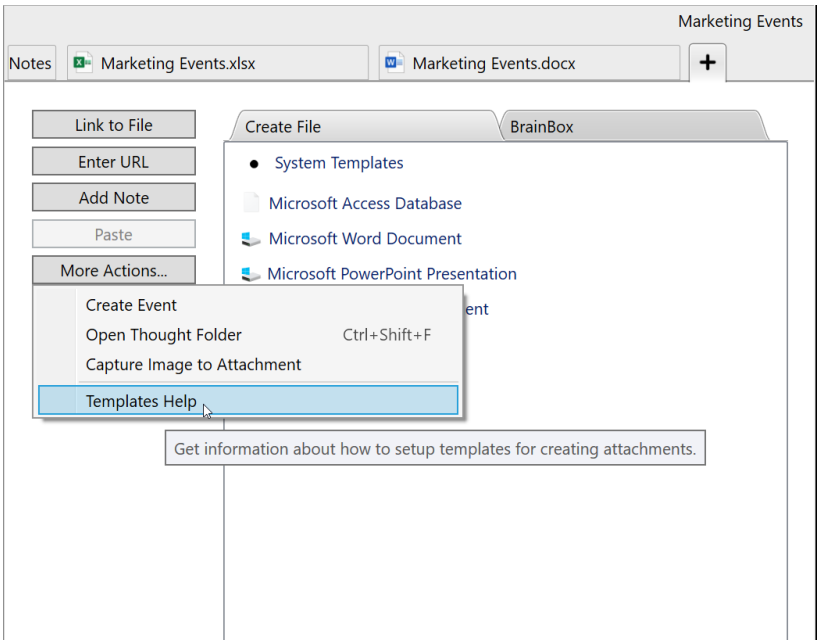



**Figure 203. The Add Attachment Tab in the Content Area**

The attachment tab toolbar automatically displays when an attachment is selected:

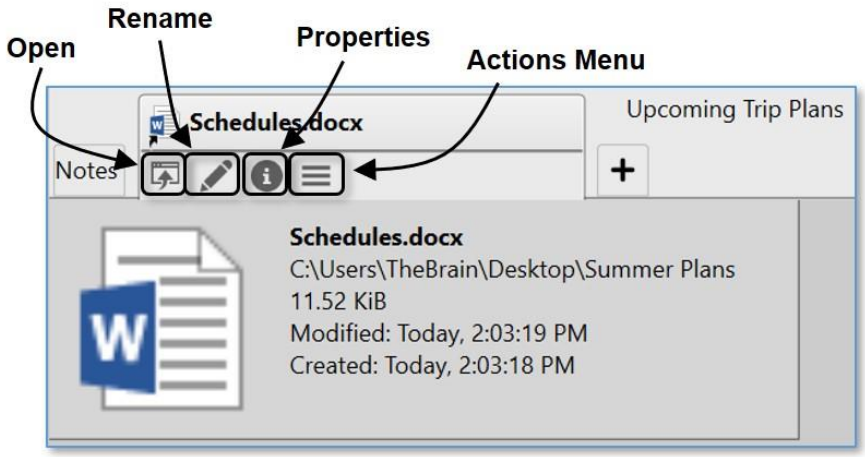



**Figure 204. Attachment Tab Toolbar**

- **Open**: Open the attached file in its default application
- **Rename**: Change the name of the selected file
- **Properties**: Display the file's properties
- **Actions Menu**: Display all available commands for the selected attachment

## Attaching Files

You can use standard “drag and drop” techniques to add file attachments into your Brain from other programs to a Thought or to create new Thoughts.

**To drag and drop an item into the Content Area of a Thought:**

1. Make sure the Thought to which you want to add the attachment is the active Thought.
2. Click the **Add Attachment** tab in the Content Area.
3. Position the window containing the item you want to attach so that it and the **Add Attachment** tab are both visible, then drag the item to the **Add Attachment** tab or into the blank area above the Content Area tabs.

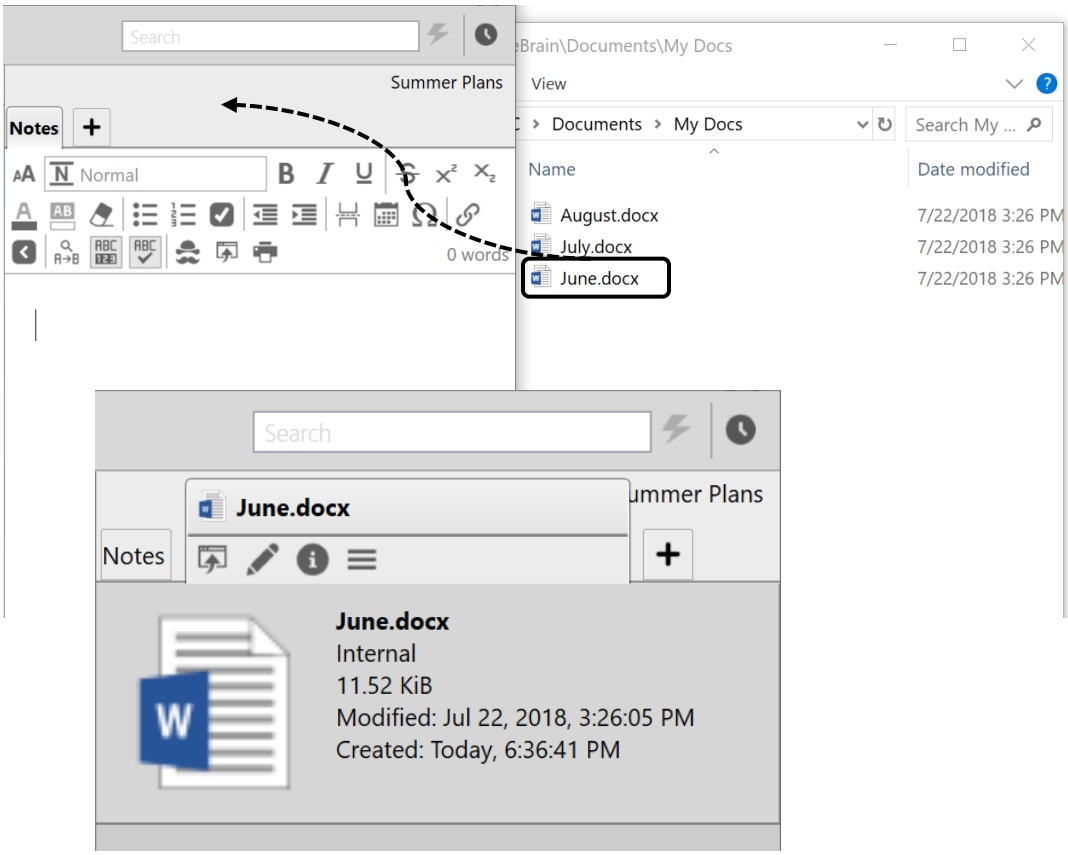



**Figure 205. Dragging and Dropping a File into the Add Attachment Tab**

### Specifying your Drag and Drop Preference

By default, all files that you drag and drop into your Brain will create a copy of the original file. You can easily change the default to suite your unique environment. Please see the Behavior Preferences section on page 74 for information about viewing and changing the “On drag and drop of files” setting.

**Tip:** You can also override the current drag and drop setting in the **Preferences** window by holding down the following keys as you drag and drop:

**In Windows**

- Link to file = **Alt**
- Move file = **Shift**
- Copy file = **Ctrl**

**In macOS**

- Link to file = **Ctrl**
- Move file = **Cmd**
- Copy file = **Alt**

### Adding an Attachment Using Link to File

Pro

You can also add a file attachment to the active Thought by clicking the **Link to File** button on the **Add Attachment** tab in the Content Area.

- Browse to the file of your choice, then click the **Open** button.

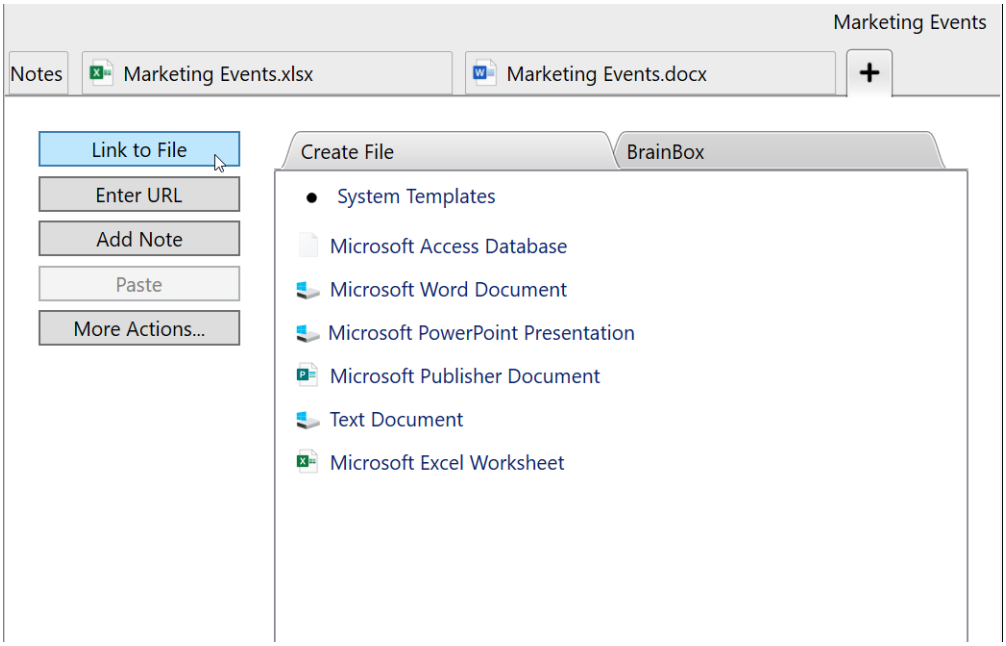



**Figure 206. Using Link to File to Add a File Attachment**

## Attaching Web Pages

Adding URL attachments to your Brain is a simple process. TheBrain's built-in browser will display each web page in a separate Content Area tab.

The easiest method for linking a web page into your Brain is to simply drag and drop it into your Brain. Click on the URL icon in the address bar of any browser and drag into one of several different locations to add the web page as an attachment:

- Drag and drop to the Plex area to create new Thoughts. The Thought name will be the title of the web page. Online non-HTML content, such as online .PDF files will be renamed with the file name.
- Drag and drop onto existing Thoughts. This will simply add the web page as an additional attachment. The Thought name will not be updated.
- Drag and drop into a note. This will create hyperlinked text within the note.
- Drag and drop to your attachment list or tabbed attachment area. Again, the existing active thought will then have this web page as a new attachment.

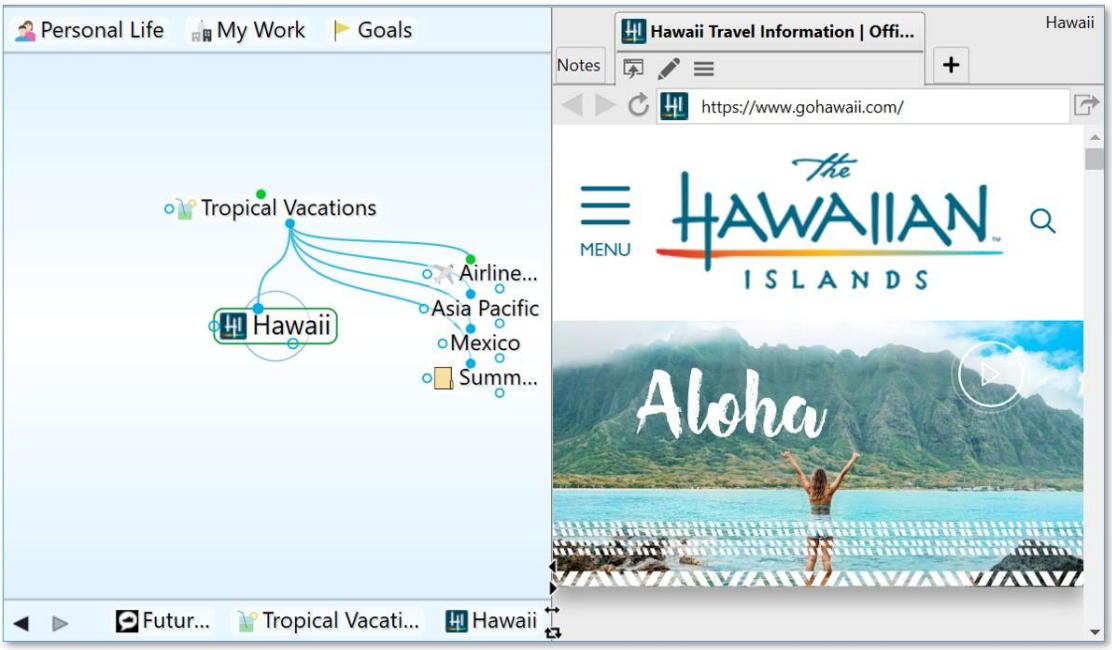



**Figure 207. TheBrain's Built-In Web Browser**

### Adding a Web Page Using Enter URL

You can also add a web page attachment to the active Thought by clicking the **Enter URL** button on the **Add Attachment** tab in the Content Area.

- Either paste or type the URL address into the empty field, then press the **Enter** key.

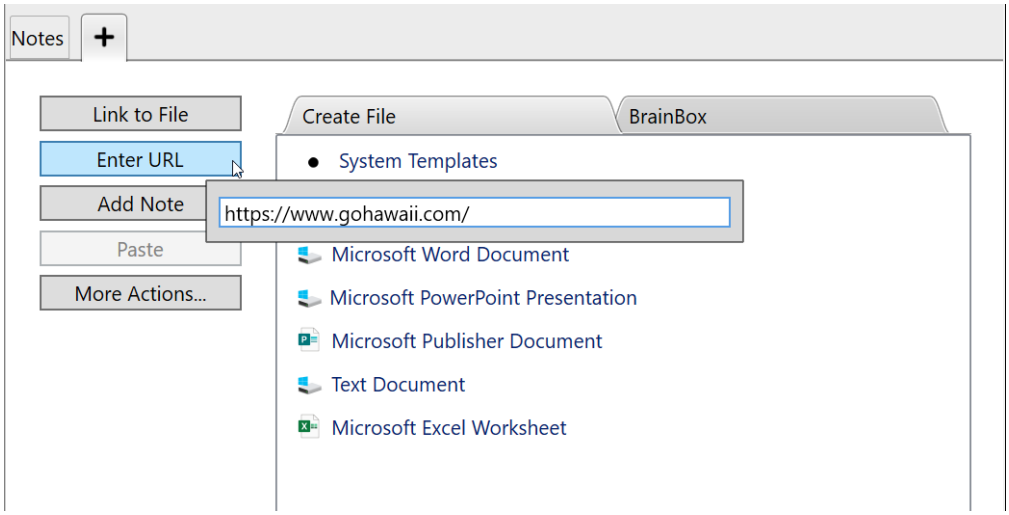



**Figure 208. Using Enter URL to Add a Web Page Attachment**

If the URL you are attaching to your thought already exists as an attachment on another thought, you'll have the option to Cancel, Add, Navigate to Attachment or Replace.

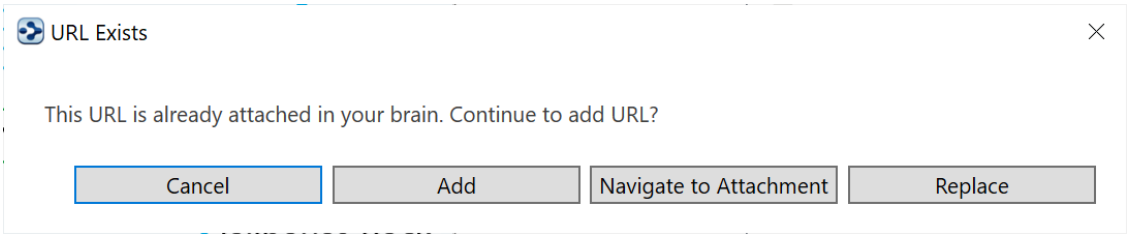



**Figure 209. URL Exists**

TheBrain's built in browser allows you to open archived web pages for attached URLs. In the context menu for any URL attachment, select **Open Using Wayback Machine**.

## Attaching Video and Sound Files

TheBrain 11 includes a built-in media player that can enables playback of several common video and audio files.

To activate the video player, select a video file attachment. The video will be previewed and the player controls will be shown near the bottom of the window. To activate the audio player, use an audio file attachment.

The primary controls are: play/pause, advance by 10 seconds, and rewind by 10 seconds. There is also a timeline that can be dragged to go directly to a specific time in the video and a button to open the file in an external player. The numbers at the left of the timeline show the amount of time that has elapsed while the numbers at the right of the timeline show the amount of time remaining.

As the window is resized, the video player and its controls scale to fit within the available space with the controls appearing in a translucent overlay on top of the video when insufficient vertical space is available.

A fading animation is utilized to hide and display the controls as necessary when video is playing. For audio files, the controls are displayed in the center of the available space and do not fade out at any time.

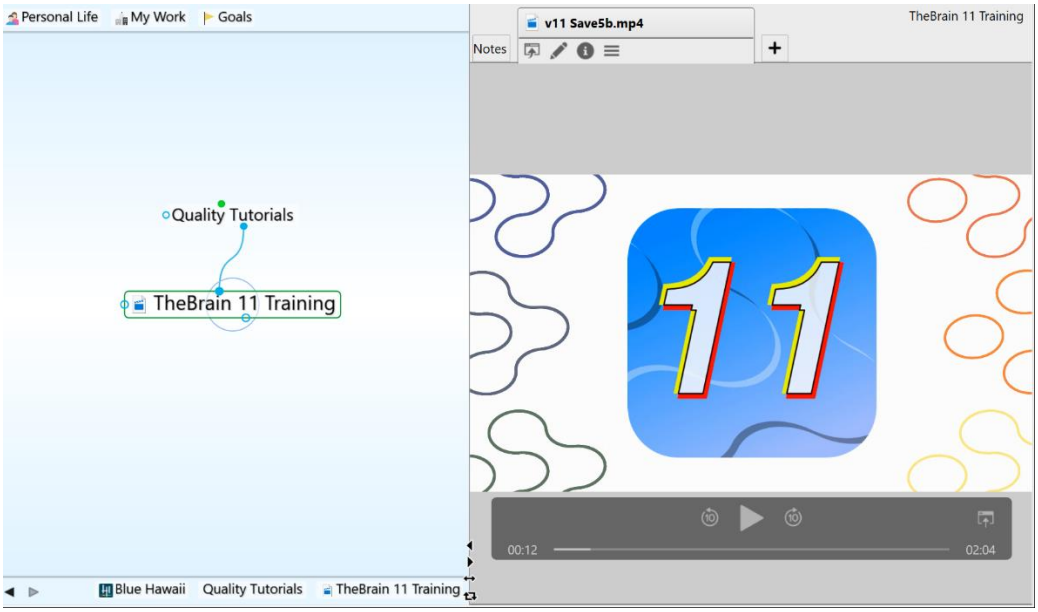



**Figure 210. TheBrain's Built-In Media Player**

**Supported File Types:**

| Media Type | Windows and macOS | Windows Only | macOS Only |
|---|---|---|---|
| Video | mov, mp4, h264, h263, mpeg, mpg, avi, mkv, wmv | mkv | 3gp |
| Audio | mp3, wav, aac, ts, flac | pcm, wma | aiff, ac3 |

## Adding Additional Notes

TheBrain allows you to add multiple notes to a single Thought. Your original Note will always display as the default, under the Notes tab. To quickly add an additional Note to a Thought, click on the Add Attachment tab and select Add Note.

## Attachment Menu for Files

Click the **Actions Menu** button or right-click anyplace in the attachment's tab to display all available commands.

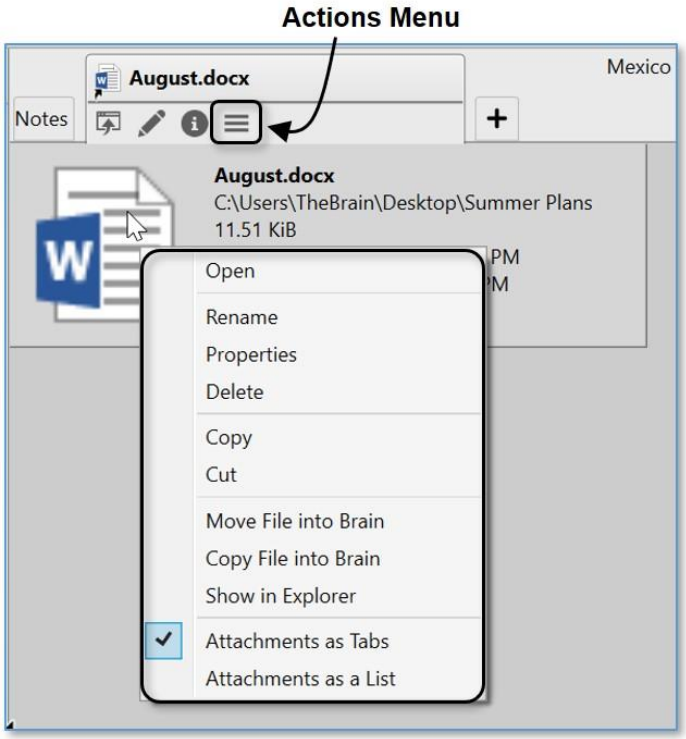



**Figure 211. File Attachment Menu**

- **Open**: Open the selected attachment in its default application
- **Rename**: Change the name of the selected attachment
- **Properties:** Display all attributes of the selected file in a separate dialog box; based on the default application, there may be properties you can change
- **Delete**: Delete the selected attachment (you will be not be prompted to confirm the deletion but you can use the **Edit** menu to **Undo** the deletion)

- **Copy**: Copy the selected attachment to the clipboard; you can then paste the attachment elsewhere in your Brain
- **Cut**: Place the selected attachment into the clipboard; the attachment will be removed from its current location when it is pasted elsewhere in your Brain
- **Move File into/out of Brain**: Switch this attachment between internal and external storage; if you are moving the file out of your Brain, you will be prompted to specify the destination folder
- **Copy File into/out of Brain**: Switch this attachment between internal and external storage; if you are moving the file out of your Brain, you will be prompted to specify the destination folder
- **Show in Explorer**: Opens the folder in which the file resides
- **Attachments as Tabs**: Shows each attachment in a separate tab (default)
- **Attachments as a List**: Shows all attachments in a single list below any text in the **Notes** tab

### Attachment Menu for URLs

An attachment that is a web page has a slightly different menu. Access it by clicking the **Actions Menu** button or right-clicking the attachment's tab in the Content Area.

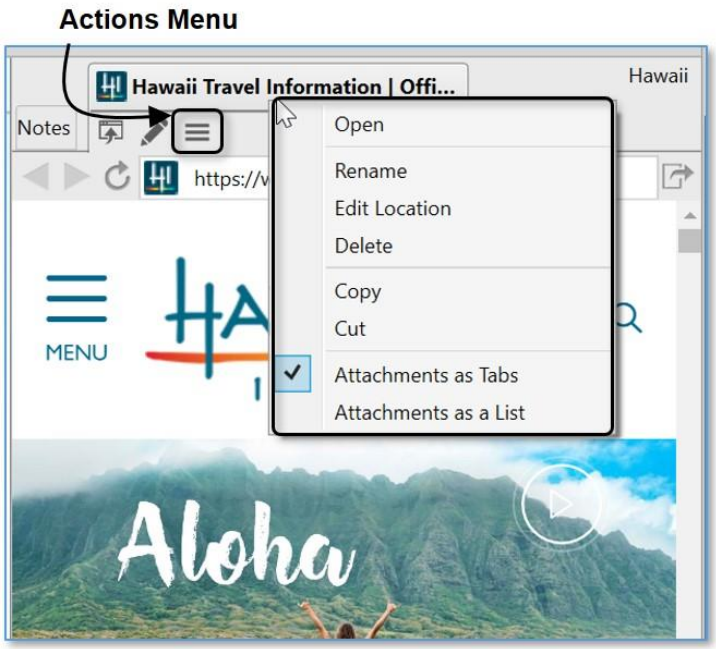



**Figure 212. URL Attachment Menu**

- **Open**: Open the selected web page in its default application
- **Rename**: Change the name of the selected attachment (not the URL itself)
- **Edit Location**: Change the URL address for the selected attachment

The rest of the commands work as they do for file attachments.

When a Thought's attachments are modified, the modification date of the Thoughts is also automatically updated, improving the accuracy of your searches and filters.

## Other Ways of Opening Attached Files

In addition to clicking the **Open** command on the attachment's context menu or **Actions Menu**, you can also click the file's icon next to the Thought in the plex. If there are multiple attachments, a list will be displayed for you to use to choose which attachment you want to open. If there is only one attachment, it will be opened immediately.

## Previewing an Attachment

The document Preview option allows you to visualize file attachments right in the content window of TheBrain without having to launch the file's default application.

### Windows Instructions

Each file attachment in your Brain has a **Preview** button in the Content Area.

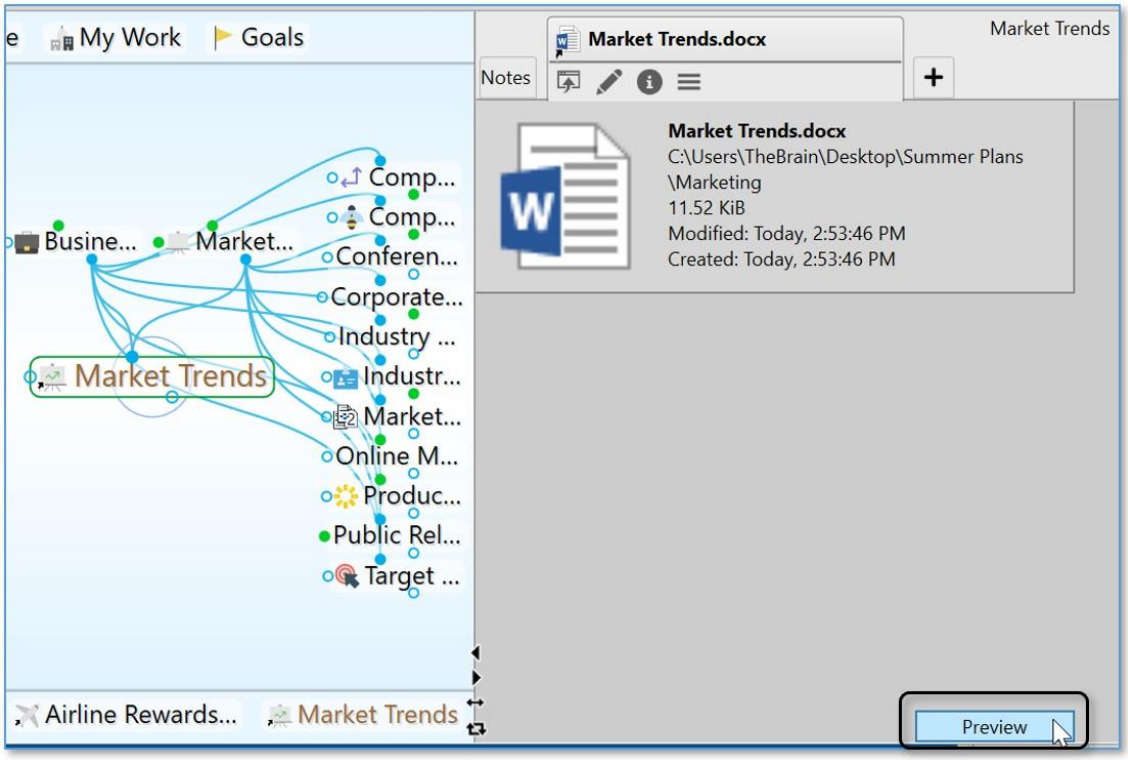



**Figure 213. Preview Button in the Attachment Tab**

- Click the **Preview** button to launch the Preview for this attachment.

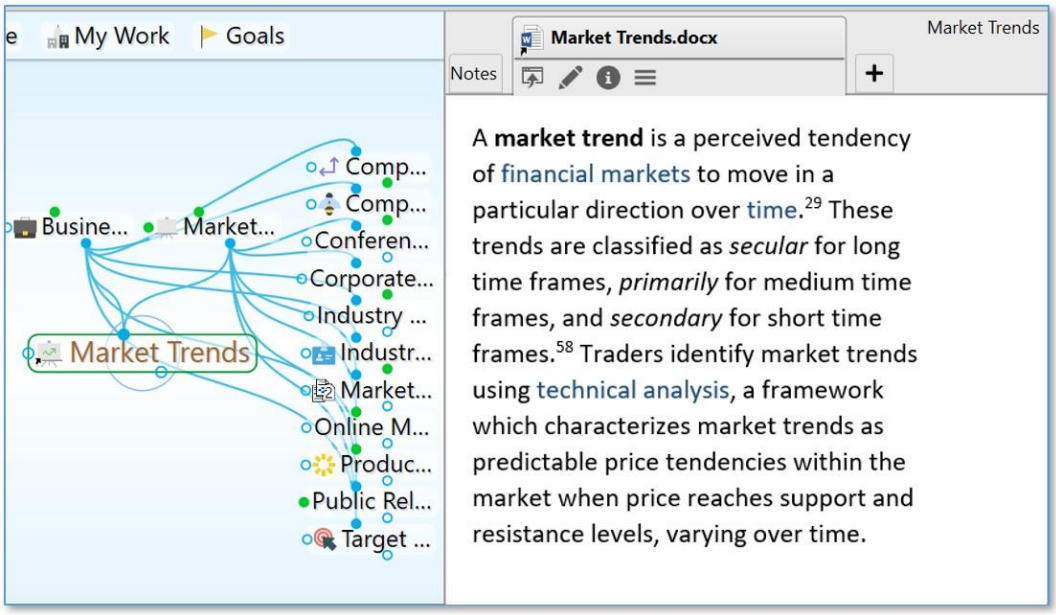



**Figure 214. Content Preview**

### MacOS Instructions

1. Click **Preferences** on **TheBrain** menu.
2. On the **UI** tab, check the box for **Preview File for Attachments**. Attached files will automatically display in the Content Area.

## Working with Multiple Attachments

You can add multiple attachments to Thoughts and you can have many types of attachments for a single Thought. For example, if you have a Thought for a person, you might attach their blog as a web page, and their resume in a file—all in the same Thought.

When there is more than one attachment, the number of attachments is displayed on the Thought icon. For example, the Thought shown below has two attachments:

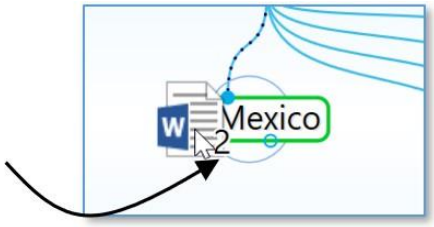



**Figure 215. Number of Attachments Indicator**

For keyboard navigation, when opening a list of attachments for a single thought, the first attachment will automatically be selected.

## Creating an Event as an Attachment

You can use the **Create Event** button in the **Add Attachment** tab to add events to your Thoughts. Please see the Managing Events section on page 206 for details.

## Capturing an Image for an Attachment

1. Navigate to where the picture is so that it is ready to be captured, then return to TheBrain. Activate the Thought to which you want to add the image as an attachment.
2. Click the **Add Attachment** tab in the Content Area, then click the **Capture Image** button. Cross-hairs will appear on the screen.
3. Click and drag to the two opposite corners of the area of the screen you want to use. If you make a mistake, press the **Esc** key and start over. The

area you selected will instantly be added in a new attachment tab in the Content Area.

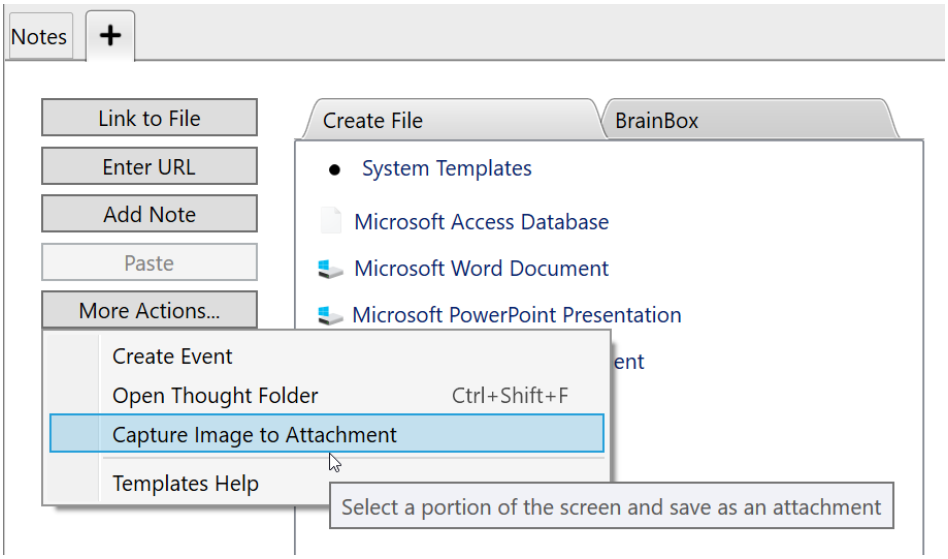



**Figure 216. Capturing an Image**

When an image file is attached to a thought, right clicking and selecting **Copy** from the context menu will copy the file to your clipboard. Right clicking and selecting **Copy Image** will copy the image to your clipboard.

## Adding a Template File to Your Brain

There may be types of files that you create frequently that share a common look and feel. For example, you may prepare correspondence using a common letterhead. You can designate template files that will be at your fingertips whenever you create attachments.

**To create a template file:**

1. Click the **Add Attachment** button in the Contents Area.
2. Click the **Templates** button.

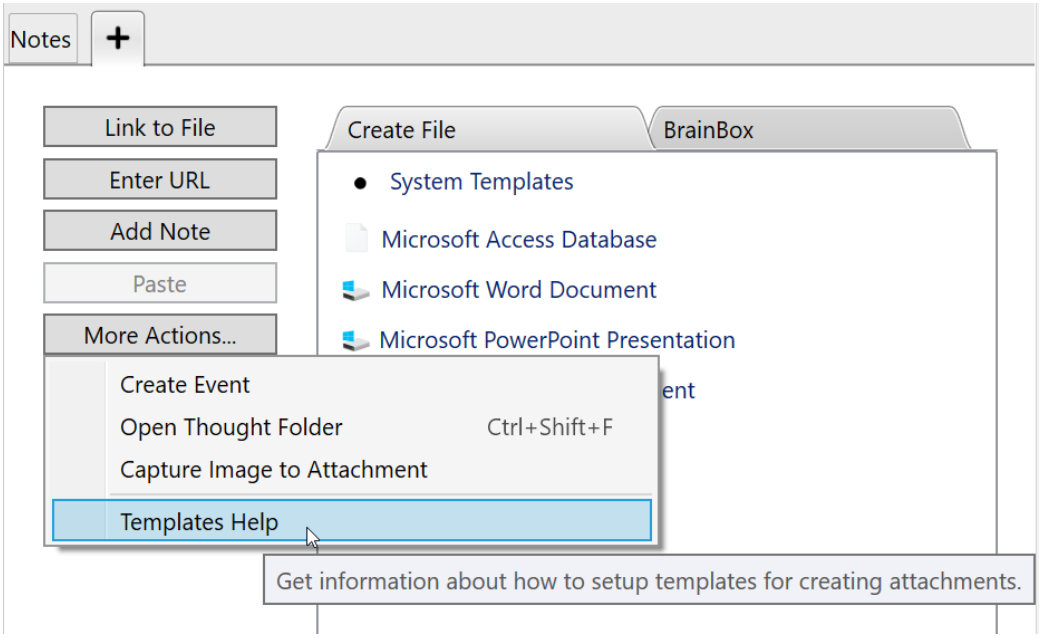
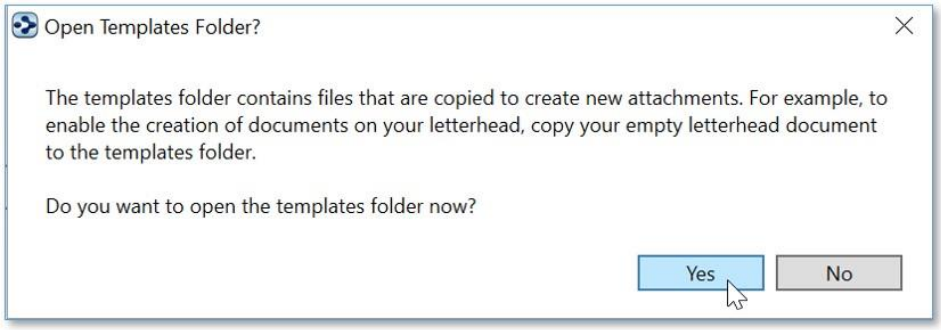



**Figure 217. Adding a New Template**

3. Click the **Yes** button to confirm that you want to open the templates folder.




4. Click the **Yes** button to confirm that you want to open the templates folder.
5. Drag or paste the file of your choice into the window, then close the window.

   The next time you open the **Add Attachment** tab, the file you added will be available in the list of attachments. Custom templates will be prioritized and display in a grouping above the system templates list.

**Tip:** If you edit one of the files in your templates folder, save it under a new name in order to preserve your original template.

## Pasting in an Image as an Attachment

If you have copied an image, the **Paste File** button in the **Add Attachment** tab will be enabled. Click the button to add the image as an attachment to the active Thought. Common file types such as .jpg, .gif, .png and .svg will all preview in TheBrain content area.

Additionally, multiple image files can be copy/pasted or drag/dropped into TheBrain as attachments at a single time.

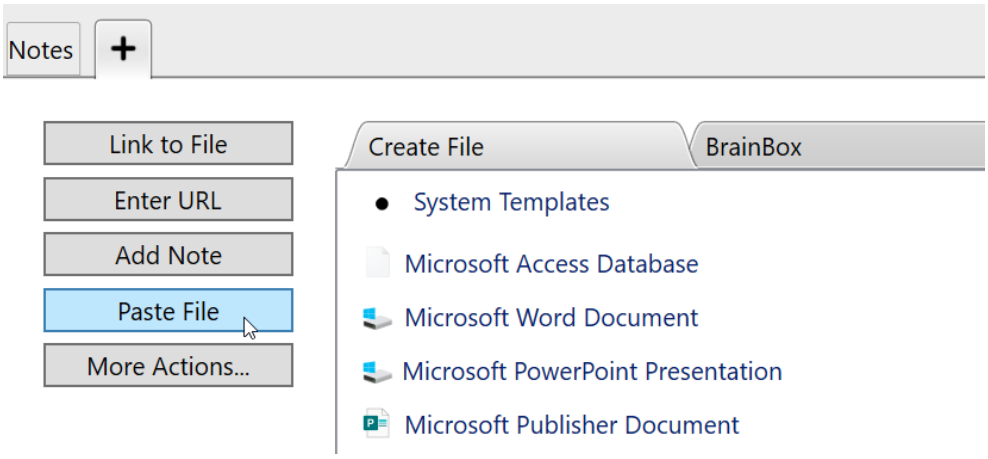



**Figure 218. Pasting In an Image**

## Creating New Files as Attachments

Click any of the file types in the **Create File** list to begin created a new file in the associated application. By default, the new file will have the same name as the active Thought and it will be saved as an internal file.

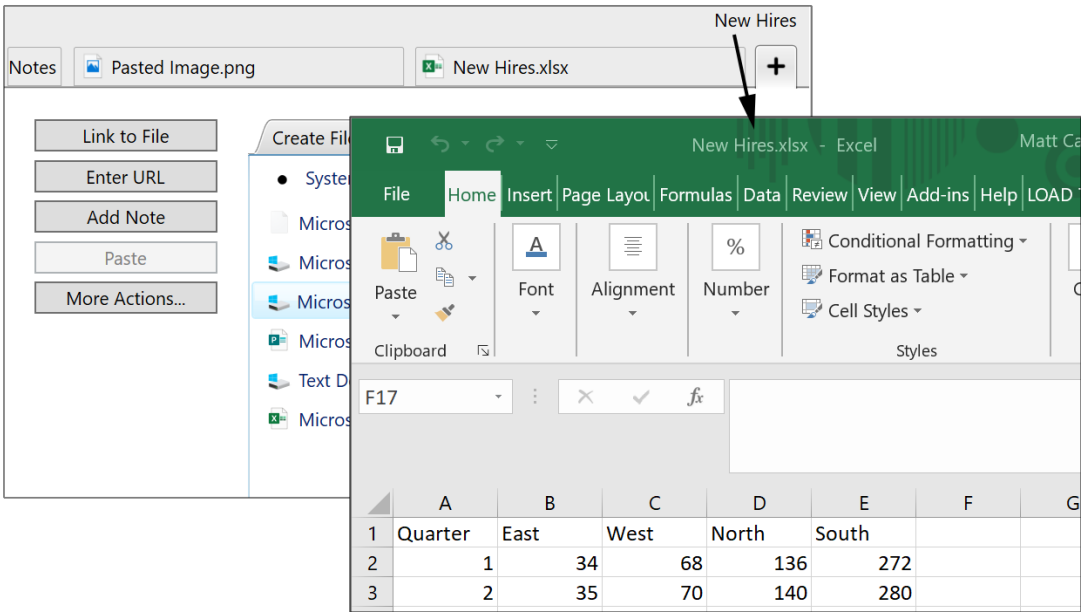



**Figure 219. Creating New Files**

### Using the Save As Command

Pro

You can use any application's "Save as" command to create a new file inside your Brain. For example, if you have opened a Word file that is an internal attachment to a Thought, you would click the **File** menu, click the **Save as** command, then enter the name of the new file to create. The new file will automatically appear in a tab of the Thought's Content Area.

# 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.

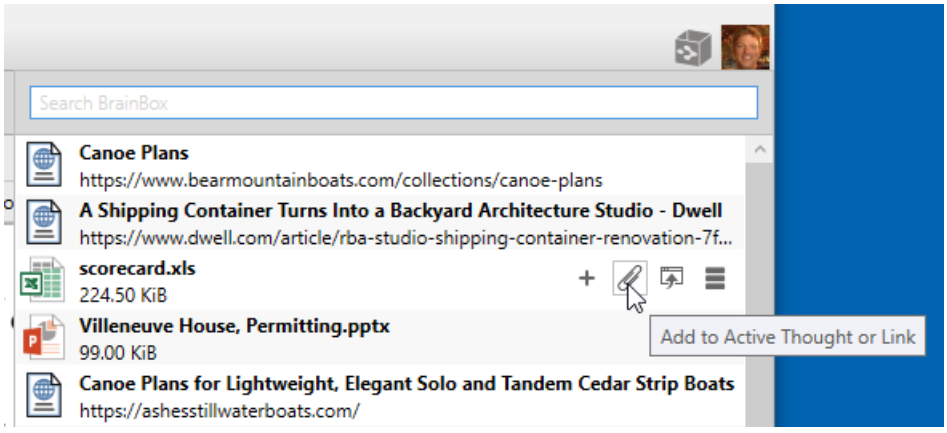



**Figure 220. The BrainBox Button**

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 context menu will also allow you to either **Move** from BrainBox to the active Thought or **Copy** from Brainbox.

### 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.

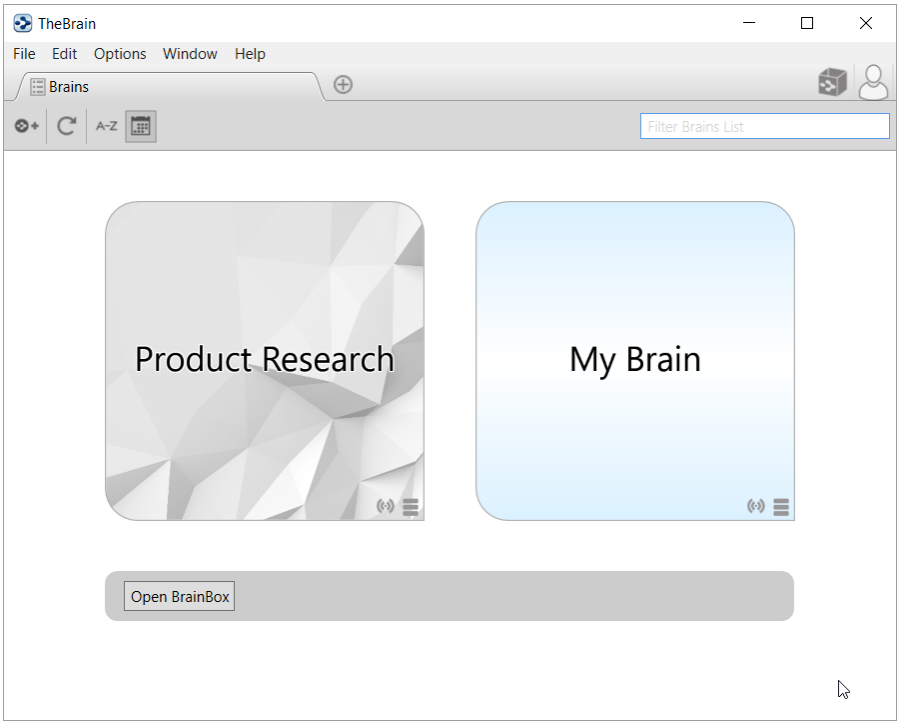



**Figure 221. The BrainBox Tab**

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

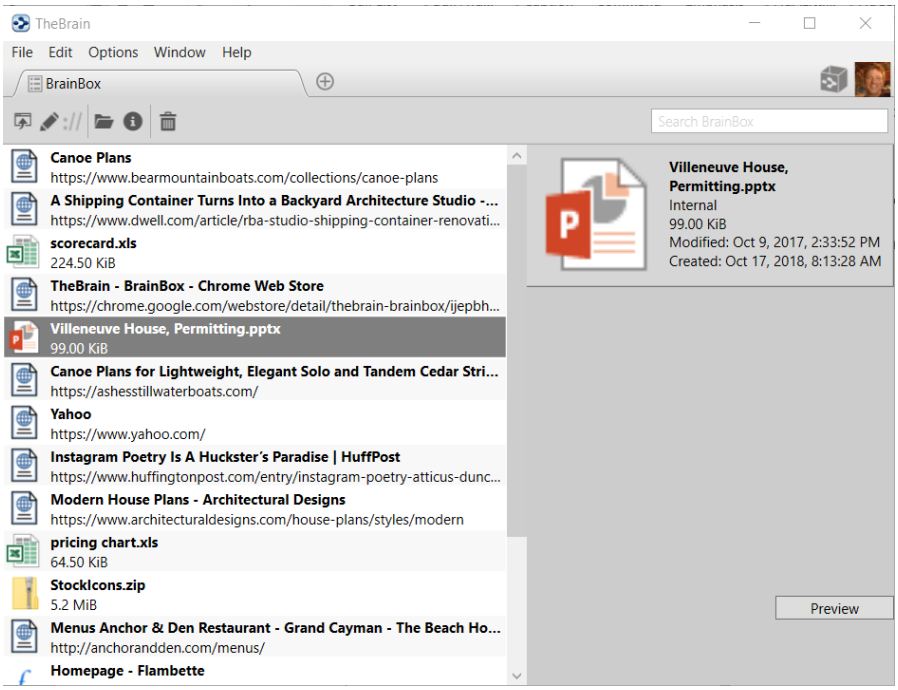



**Figure 222. The BrainBox Tab**

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

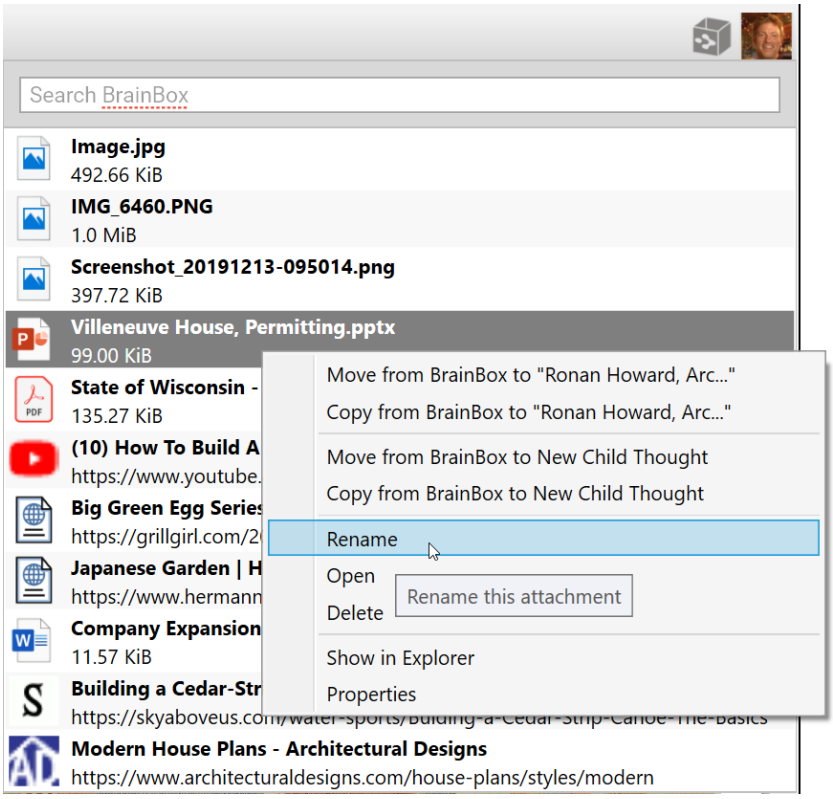



**Figure 223. Editing Content of The BrainBox**

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.

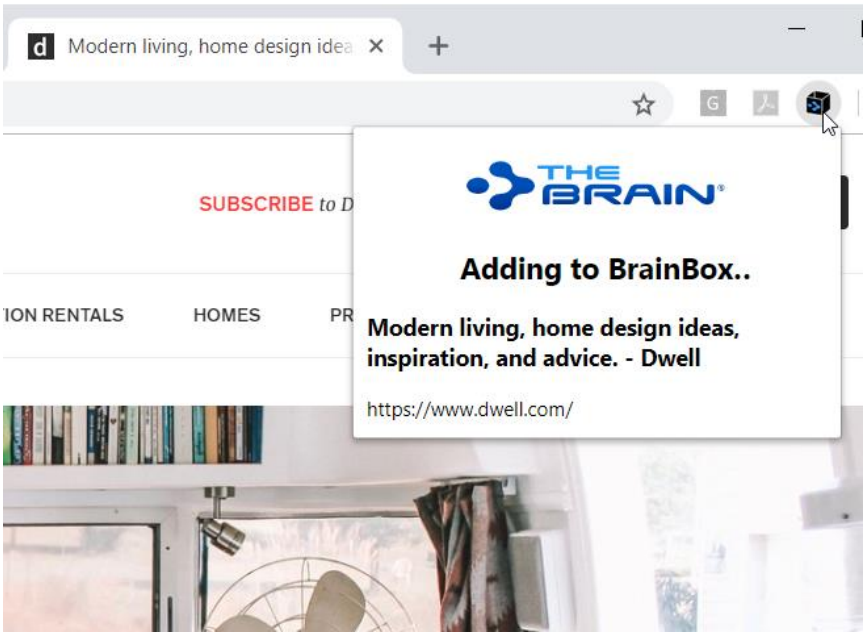



**Figure 224. Clicking on the BrainBox Extension**

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 11.

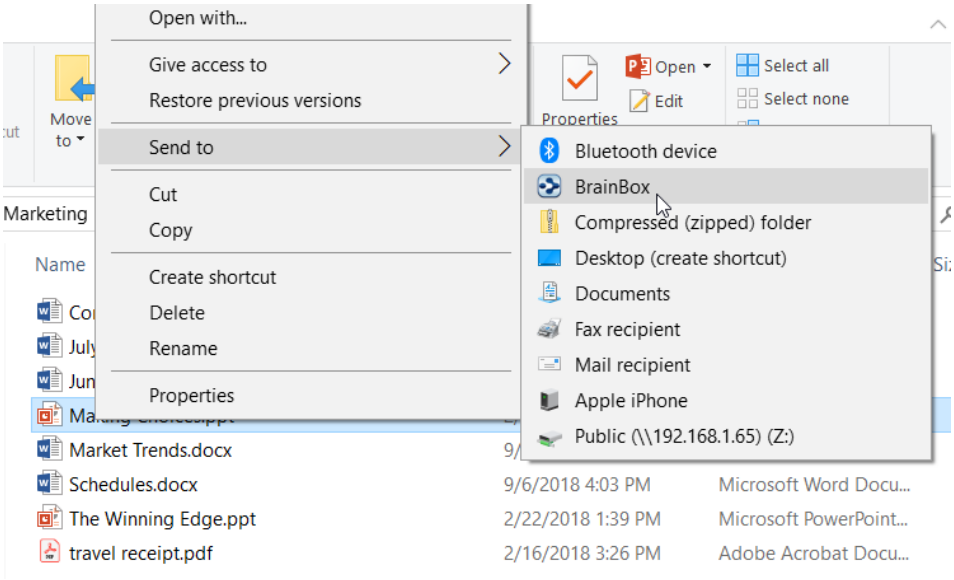



**Figure 225. Sending a File to BrainBox**

### 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.

# Running Reports

Reports are an excellent way to manage large groups of Thoughts in your Brain. To open a Brain's Report area, click the **View** menu then click the **Report** command. The report pane is resizable.

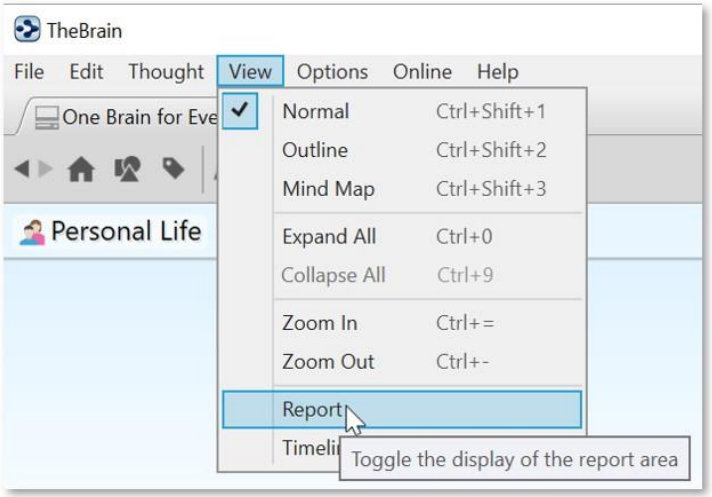



**Figure 226. Viewing the Report Area**

## Selecting Report Criteria

The **Thoughts** drop-down list includes the following options and each selection provides additional criteria choices for fine-tuning your reports.

**Figure 227. Thought Options for Reports**

You can run reports based on the criteria discussed below.

### By Types/Tags

The **By Types/Tags** option in the **Thoughts** drop-down helps you filter Thoughts in your Report by checking for specific Thought Types and Tags. All Thoughts

that don't meet the criteria will be excluded from the report. By default, Thoughts of any Type will be included.

- Click the **Types** field, then select the check box for each Thought Type to be included. Click outside of the list to close it.

**Figure 228. Selecting Thoughts by Types**

Use the **Tags** drop down to filter Thoughts based on your assigned Tags.

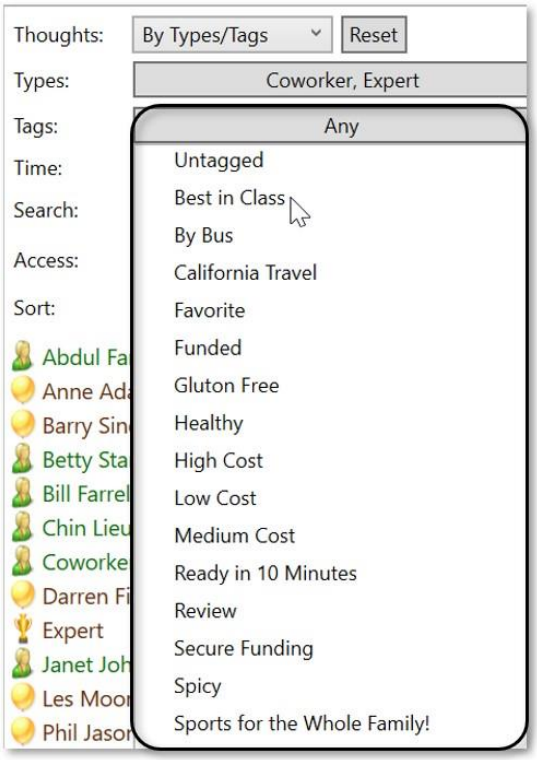



**Figure 229. Filtering a Report by Tags**

Clicking on a Tag in the list will add a "**+**" next to it, indicating that you want to list Thoughts that have that Tag. Clicking the same Tag again will add a "**-**" next to it. This indicates that you do not want Thoughts with that Tag listed. Clicking the same Tag once more will remove it from your list of filtered Tags.

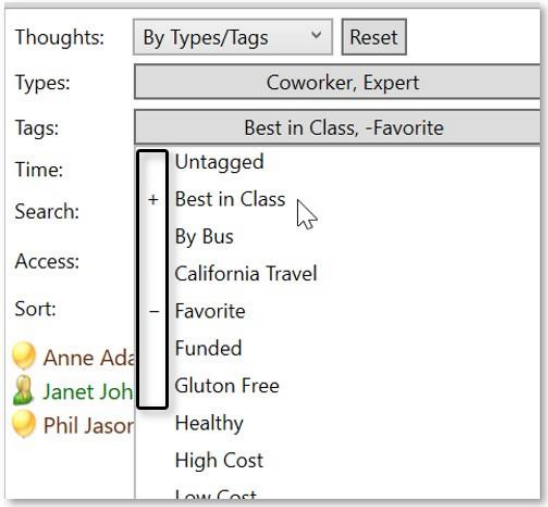



**Figure 230. Filtering With and Without Tags**

Use Types and Tags together in a report for some incredibly powerful Thought filtering. When your report is displayed, you can click on any result to immediately navigate to the Thought.

## Forgotten Thoughts

The Forgotten Thoughts selection allows you to quickly view and access any Thoughts you have forgotten in a Brain.

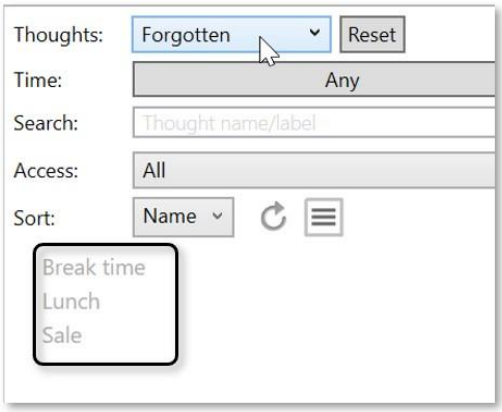



**Figure 231. Forgotten Thoughts Report**

With **Forgotten** selected in the **Thoughts** drop down, you can use the menu button to add all forgotten Thoughts in your report to your Selection, remove all forgotten Thoughts in your report from your Selection, permanently delete all forgotten Thoughts in your report, or remember all forgotten Thoughts in your report.

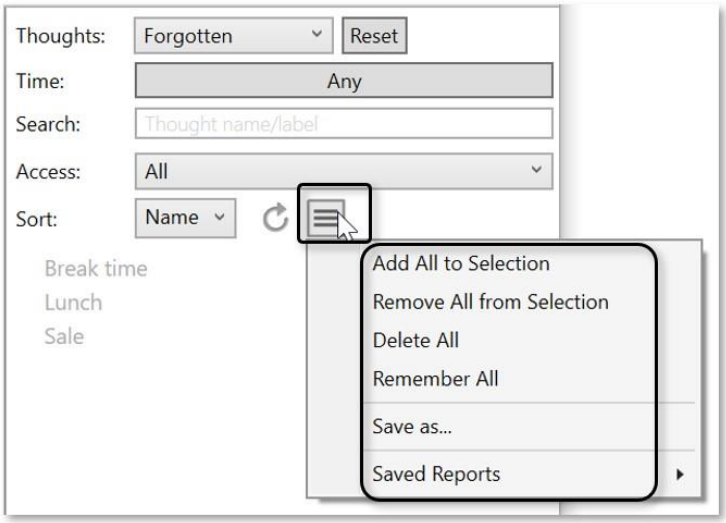



**Figure 232. Choices for Forgotten Thoughts**

A “Showing Forgotten Thoughts” message displays above the Plex. Click any forgotten Thought in the report to display that Thought in the Plex.

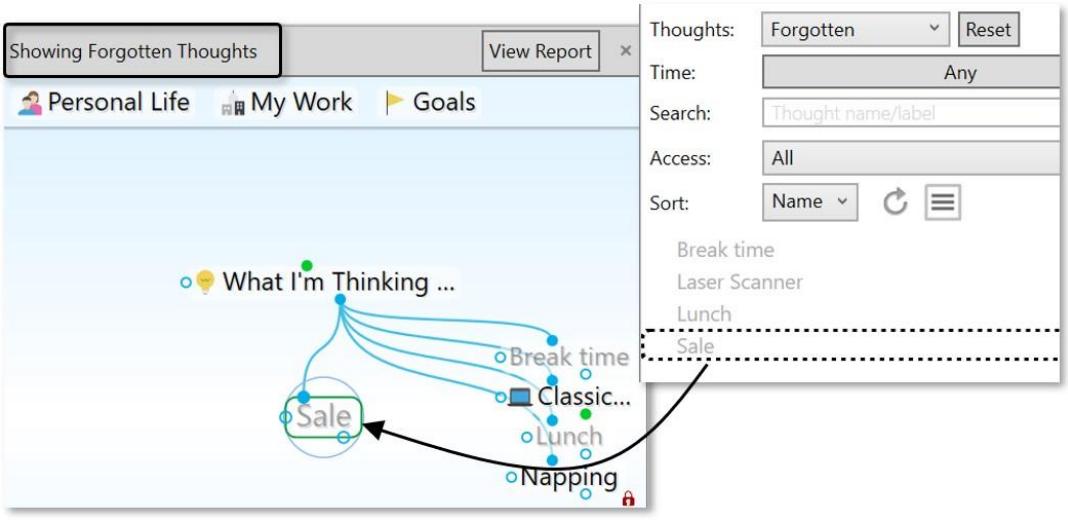



**Figure 233. Showing Forgotten Thoughts**

## Parentless Thoughts

Select **Parentless** in the **Thoughts** drop down to quickly view and access any Thoughts that do not have a parent.

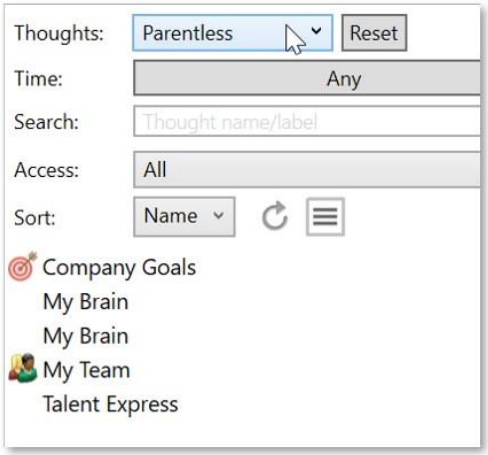



**Figure 234. Parentless Thought Report**

Viewing a Parentless Thought Report is great for tying up any loose connections or finding groups of disconnected "satellite Thought clusters" in your Brain for easy reconnection and clean-up.

Orphan Thoughts will also appear in a Parentless Thought Report. Jump Thoughts (when they have no Parent) will frequently appear in this report as well.

## Orphan Thoughts

Select **Orphan** in the **Thoughts** drop down to quickly view and access any Thoughts that do not have any other connections.

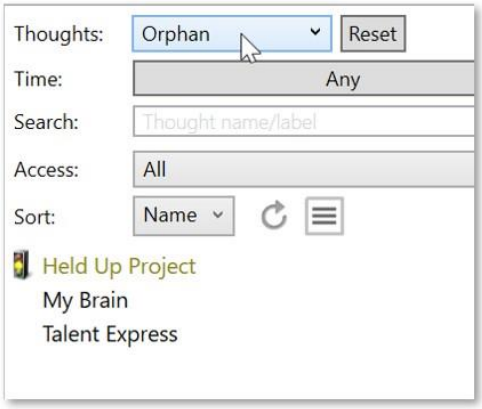



**Figure 235. Orphan Thought Report**

Viewing an Orphan Thought Report is an excellent way to find lost Thoughts or Thoughts that may have inadvertently been disconnected at some point. Is there a Thought you know you had in your Brain? Try running an Orphan Thought Report to see if it was previously unlinked by accident.

## Duplicate Names

Select **Duplicate Names** in the **Thoughts** drop down to quickly view and access multiple Thoughts with the same name.

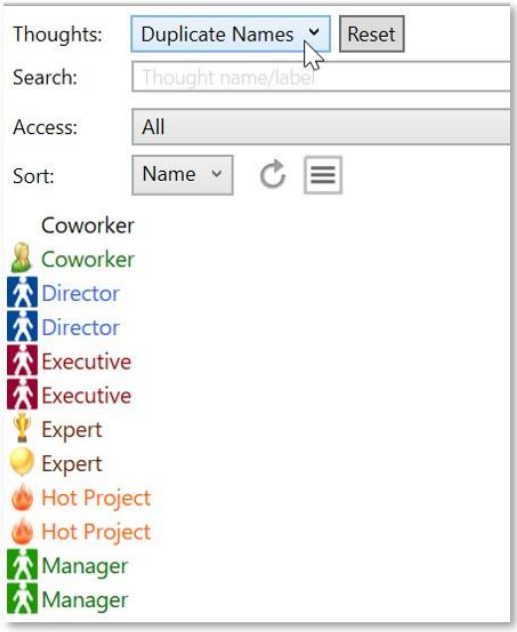



**Figure 236. Duplicate Names Report**

Viewing the Duplicate Thoughts Report can help you organize and manage your Brain to make sure you are getting the most out of your information with quick access to the most important Thoughts.

## By Attachments

Select **By Attachments** in the **Thoughts** drop down to quickly view and access all Thoughts that have an attachment.

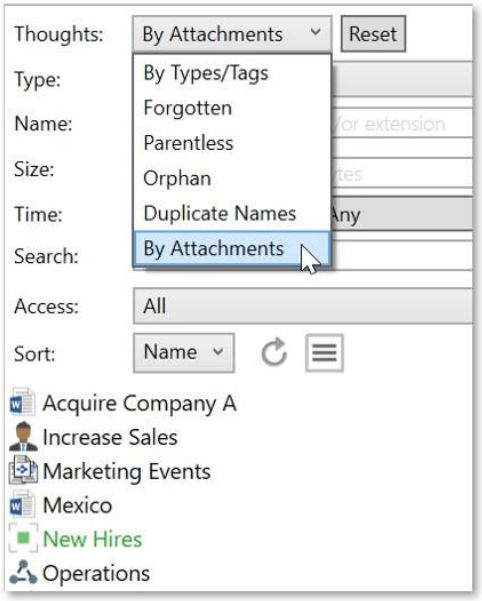



**Figure 237. By Attachments Report**

## Filtering by Modification or Creation Date

All report options except **Duplicate Names** can be further narrowed down using the **Time** drop down selections. This is incredibly useful for finding information modified within a specific date range and allows for even more in-depth reporting.

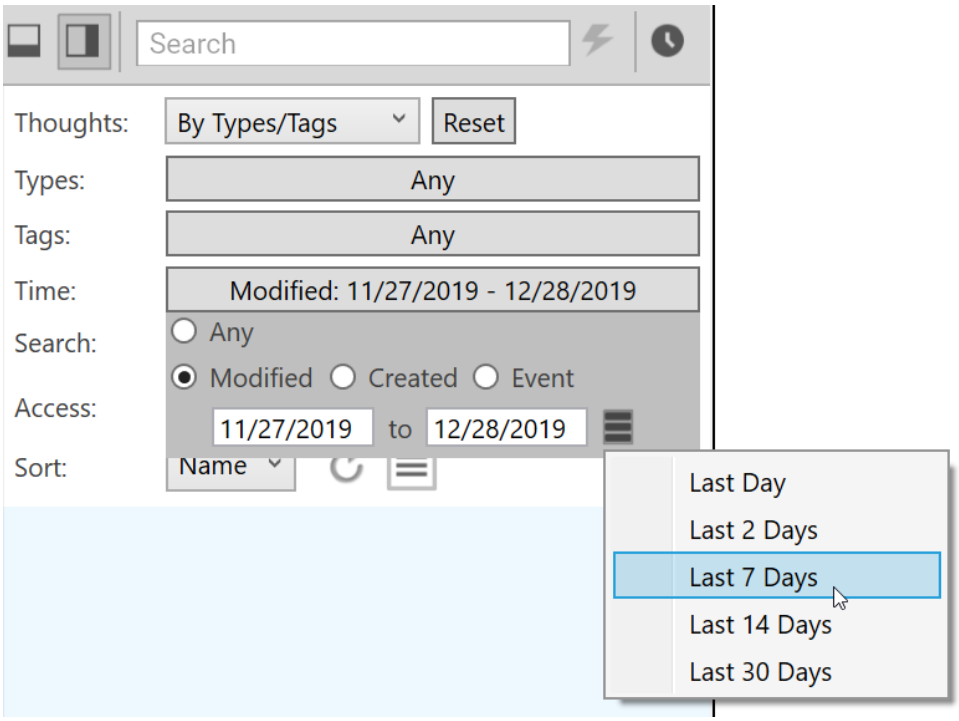



**Figure 238. Filtering Thoughts in a Report by Modified Date**

- Select **Modified**, **Created**, or **Event** to specify what the date range should pertain to. For example, selected **Modified** if you want to see Thoughts you made changes to within a specific period of time.
- Click in the first date field to display a calendar, then select a date; click in the "to" date to select an end date.
- Additionally, you can click on the context menu button to select from a preset list of date ranges:
  - Last Day
  - Last 2 Days
  - Last 7 Days
  - Last 14 Days
  - Last 30 Days
- Select **Any** if you want to remove the time criteria.

## Sorting Report Results

Use the **Sort** drop down to switch the list order of your report results between **Name** and **Date**, in descending order.

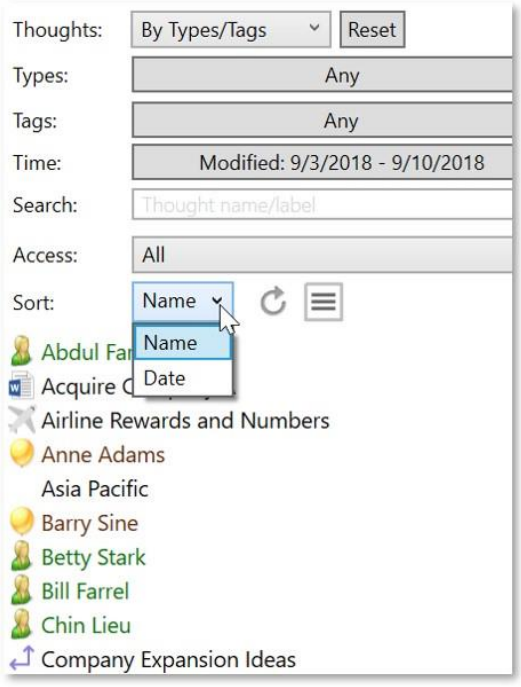



**Figure 239. Sorting Thoughts in a Report**

## Refreshing or Resetting Report Results

- Click the **Refresh** button to update the list of Thoughts that match your report criteria.

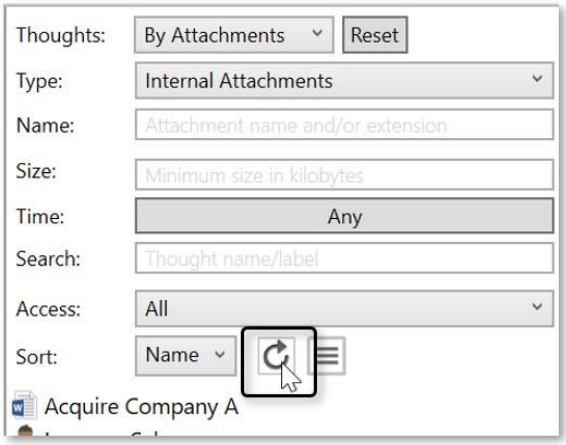



**Figure 240. The Refresh Button**

- Click the **Reset** button to clear all report criteria except the **Thoughts** field selection.

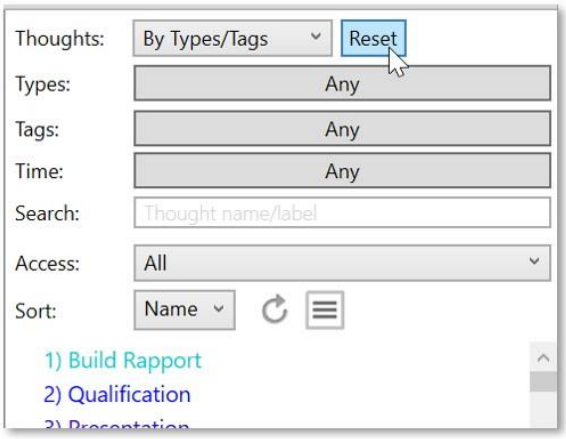



**Figure 241. The Reset Button**

## Adding Report Results to the Selection Box

- Click the menu button, then click **Add All to Selection**. All report results will be added to the Selection box where you can apply actions to the Thoughts all at one time. Right-click in the Selection area to see your choices.

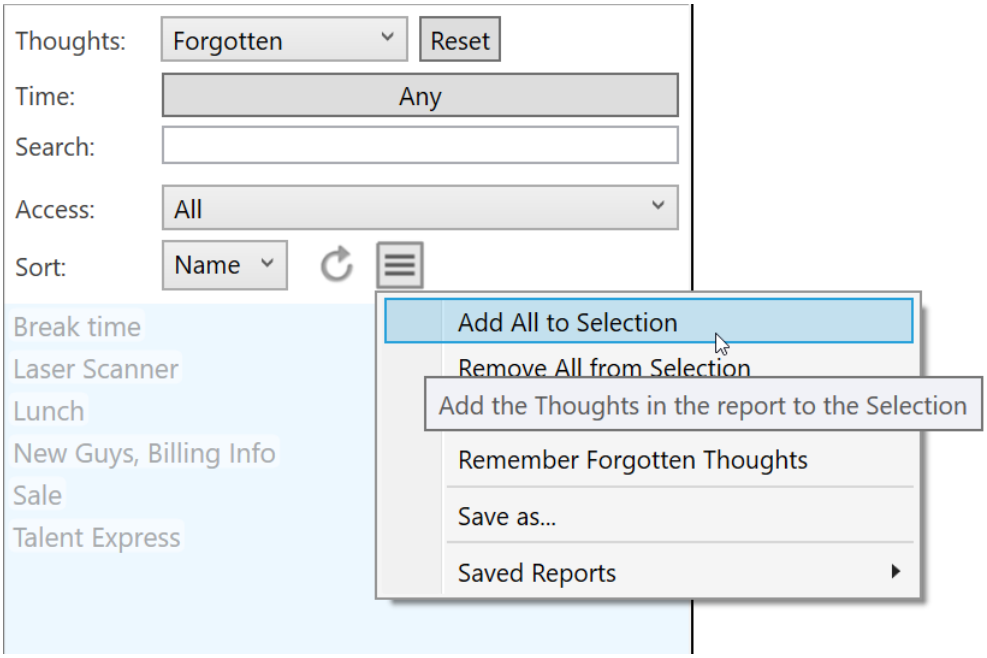



**Figure 242. Adding Report Results to the Selection Box**

## Saving and Accessing Reports

Pro Reports can be saved and used again at any time.

**To save a report:**

1. Click the **Save as** command on the menu.
2. Type a name for your report, then click the **OK** button.

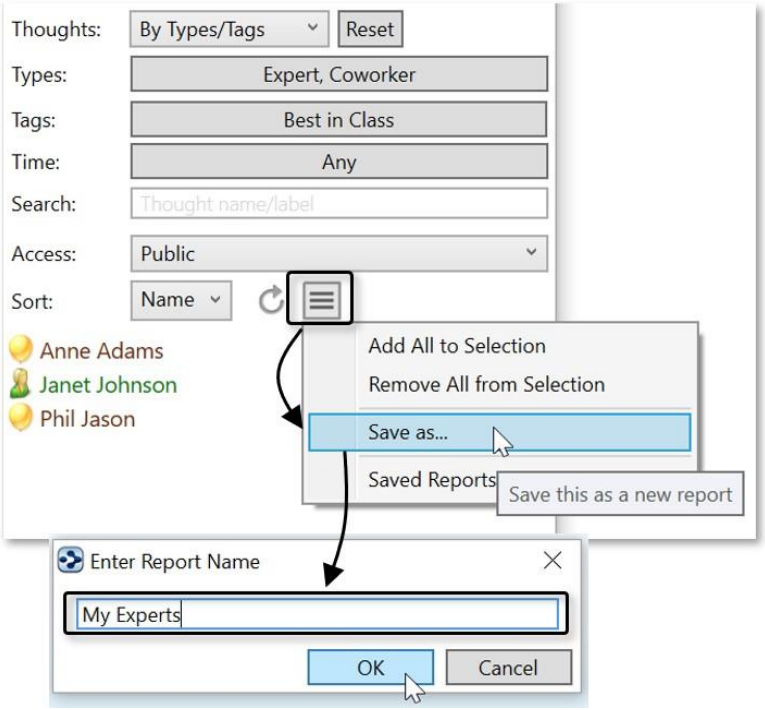



**Figure 243. Saving a Report**

**To open a saved report:**

1. Click the **Saved Reports** command on the menu.
2. Click the name of the report you want to open.

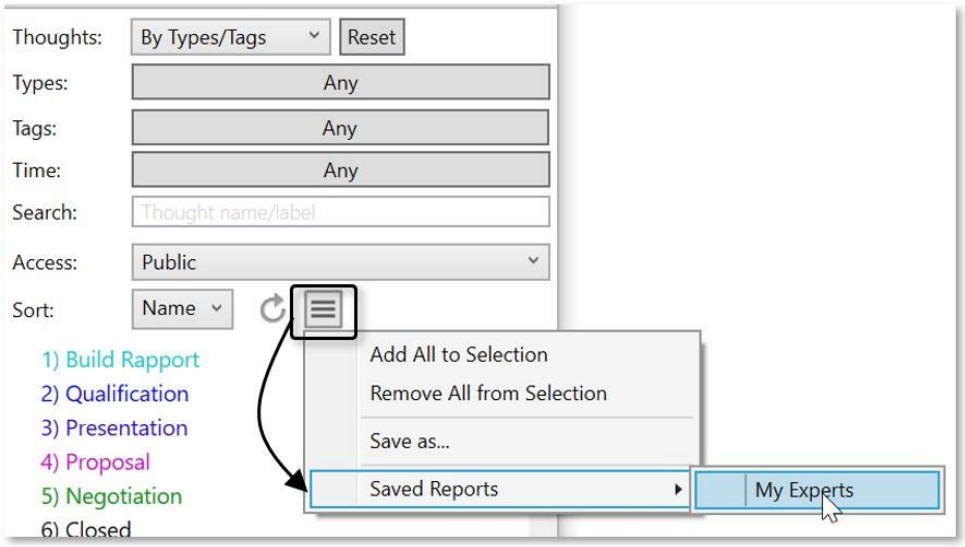



**Figure 244. Saving a Report**

## Viewing a List of Recent Changes

You can view a quick report of all changes you've made recently to Thoughts. Your Thought modifications are now logged and instantly viewable in a chronological display of the previous 1,000 created and modified Thoughts.

Modifications can include:

- Renaming
- Editing, adding or deleting attachments
- Any edit to the Thought notes
- Renaming
- Linking or unlinking to another Thought

To view your recently modified Thoughts, simply click on the clock icon to the right of the lightning bolt. Modified Thoughts will be displayed starting with the current date. When you hover over a Thought, a comprehensive, time-stamped report of the exact modification(s) appear in a pop-up next to the name.

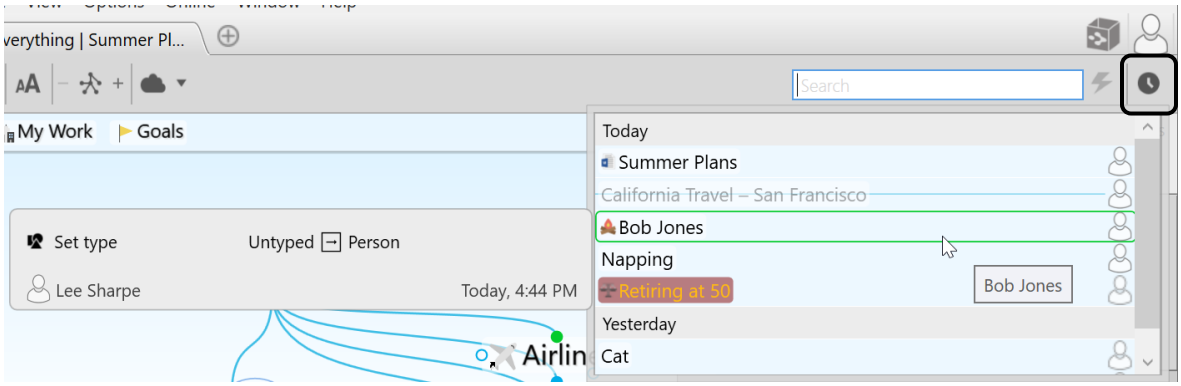



**Figure 245. Recently Modified Thoughts and Links**

# Find and Replace

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

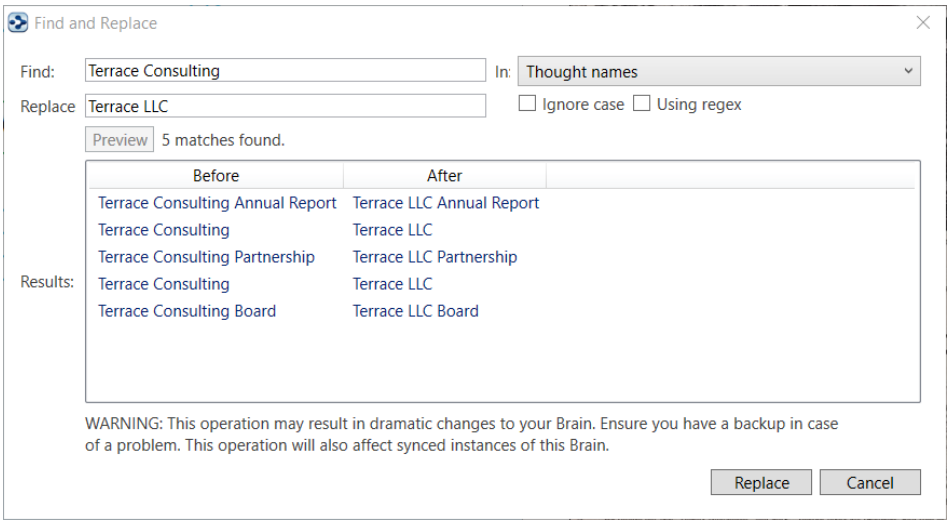



**Figure 246. Find and Replace**

Additionally, the Notes toolbar has it's own Find and Replace functionality.

# Statistics

Curious about the content of your Brain? Click on File and select Statistics to view in depth details such as:

- Date Generated
- Last Sync Date
- Number of Thoughts
- Number of Links
- Average Number of Links per Thought
- Internal File Size and Total Icon Size
- Number of Notes, Attachments, Web Links, Icons and more…

# Managing Events

Pro

Your Brain has its own built-in Calendar. You can access it from the Add Attachments tab in the Content Area or the Timeline View to can add and modify

events and integrate them with your Thoughts. You can view your Calendar a day, week, month, or year at a time.

TheBrain also has several different ways to assist you with managing your time, so you'll know when events are taking place, when content was edited and when projects are due.

## Creating a New Event

You can create a new event using the **Add Attachment** tab or the Timeline. Both methods give you full access to all event settings.

### Creating an Event from the Add Attachment Tab

1. Select the Thought with which the new event will be associated.
2. Click the **Add Attachment** tab in the Content Area then click **Create Event**.

Events created from the **Add Attachment** tab are automatically associated with the active Thought, but you can easily detach them.

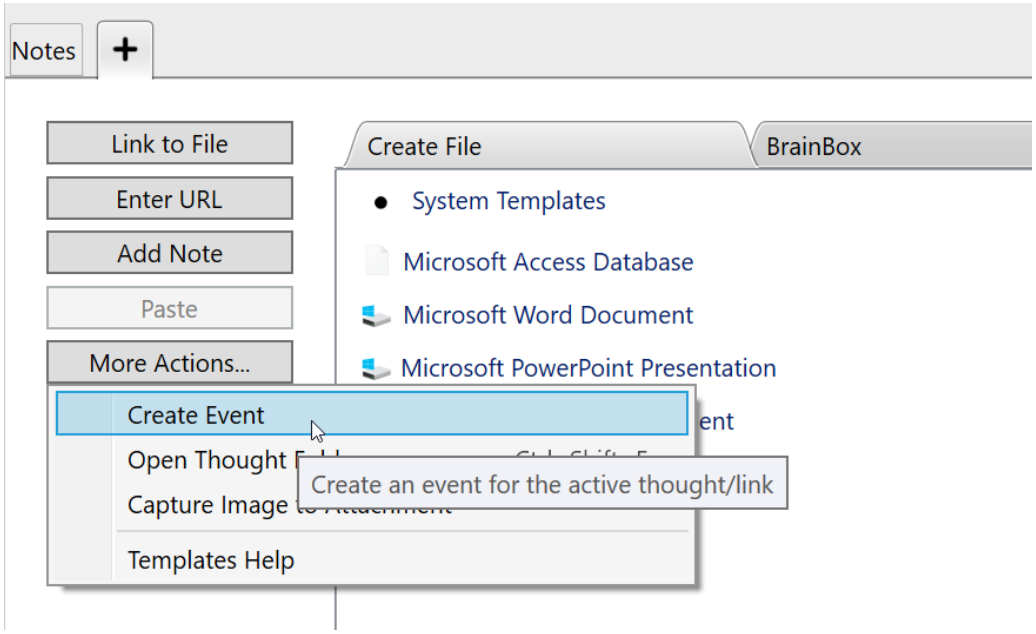



**Figure 247. Creating a New Event in the Content Area**

Use the event editor pop up to enter details about the event. By default, the name of the event is the name of the active Thought.

As shown below, you can specify start and stop times and dates and add a label, description, and location in the event editor pop up. You can make the event recurring and set up a reminder. You can also color code an event—so that all

events of a specific type (personal, marketing, finance, etc.) will appear in your Timeline view in an identifiable color.

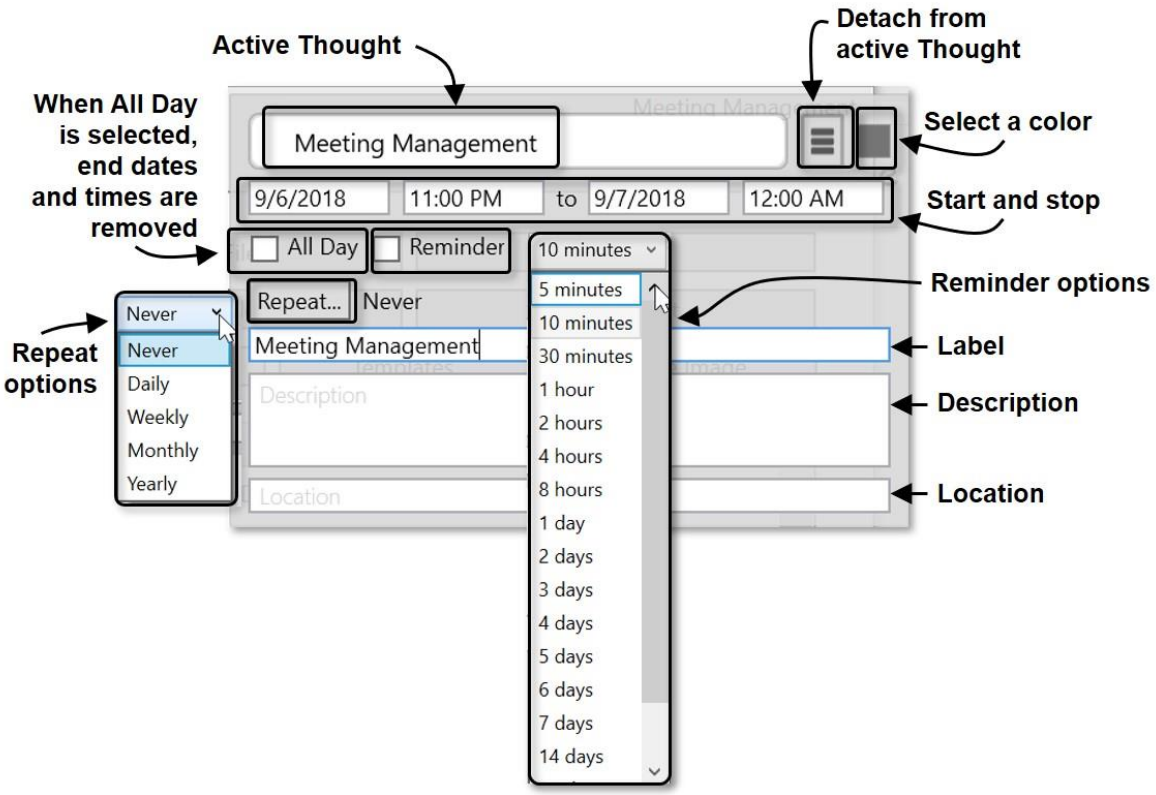



**Figure 248. The Event Editor**

## Creating an Event from the Timeline

1. Unless it is already open, display the Timeline by clicking the **Timeline** command in the **View** menu or the **Timeline** button to the left of the Search box.

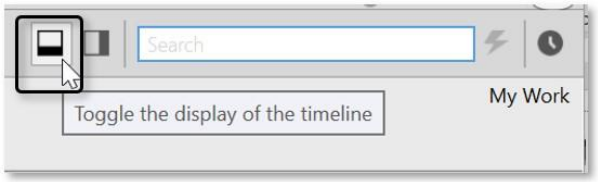



**Figure 249. Launching TheBrain Timeline**

2. Drag on the time ruler at the bottom to select the start and stop times of the event. After you finish dragging, the event editor will be displayed. By default, this will be a standalone event, not associated with the current active Thought. You can easily attach it to the active Thought by clicking **Attach to** "*active thought*" in the event editor menu.

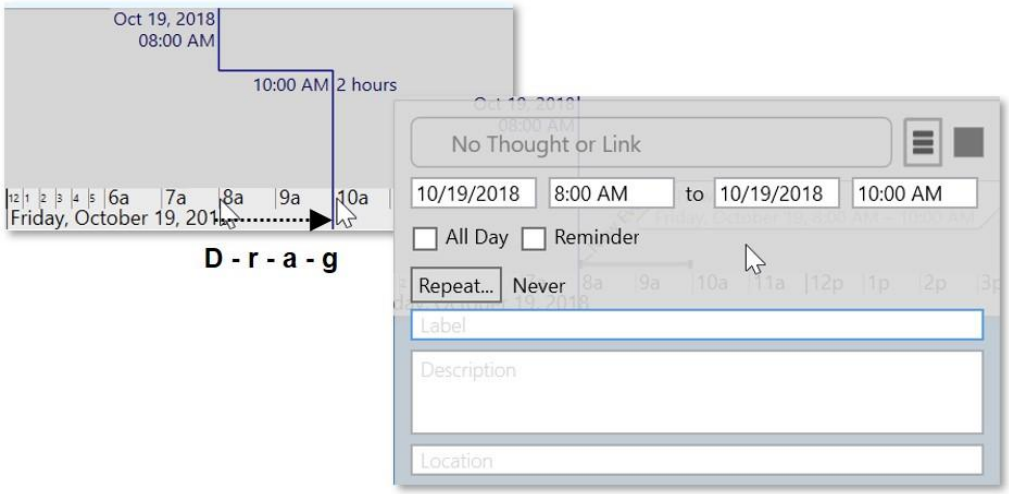



**Figure 250. Click and Drag to Create a New Event**

Please see the Navigating in Timeline View section on page 212 for information about using the Timeline and 1-click fine-tuning based on your preferences.

## Responding to Event Reminders

Reminders appear when the Brain containing the event is open.

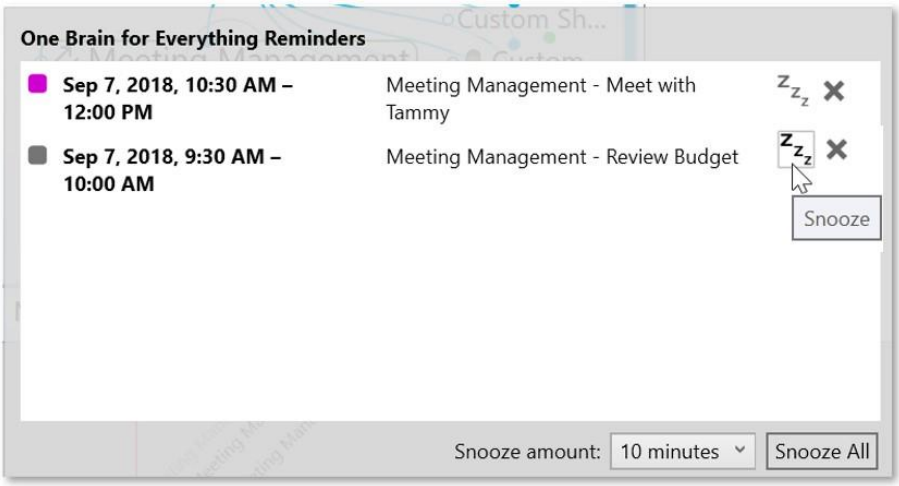



**Figure 251. TheBrain's Event Reminder Pop Up**

From the **Reminder** window, you can snooze for a designated amount of time or dismiss the reminder. Dismissing the reminder does not delete the event in your timeline.

## Editing and Deleting Events

### To edit or delete an event from the Content Area:

- Click the **Events** tab, then click the pencil icon to edit the event or the trash can icon to delete the event.

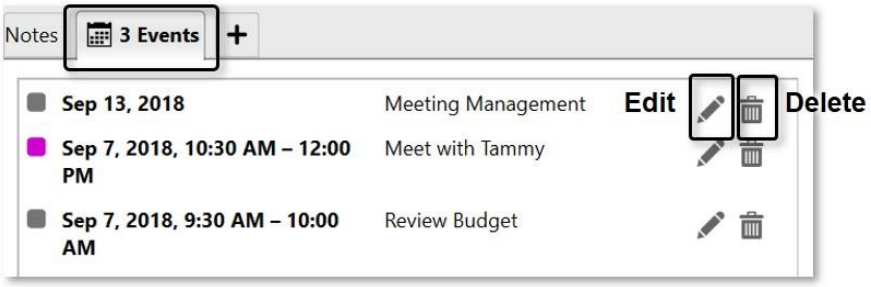



**Figure 252. Editing and Deleting Events in the Content Area**

### To edit or delete an event from the Timeline:

- To edit, click the event to open the event editor pop up.
- To delete, right-click the event on the Timeline, then click **Delete Event**. You can also delete the event by selecting **Delete Event** in the event editor pop up.

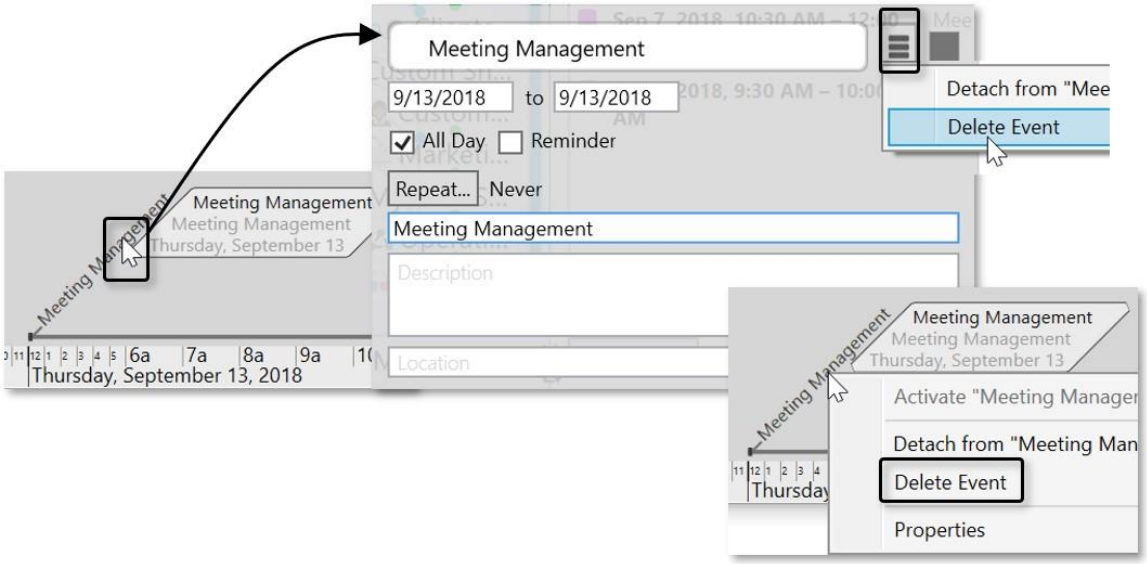



**Figure 253. Editing and Deleting an Event in the Timeline**

## Navigating in Timeline View

- Drag up and down to zoom in and out.

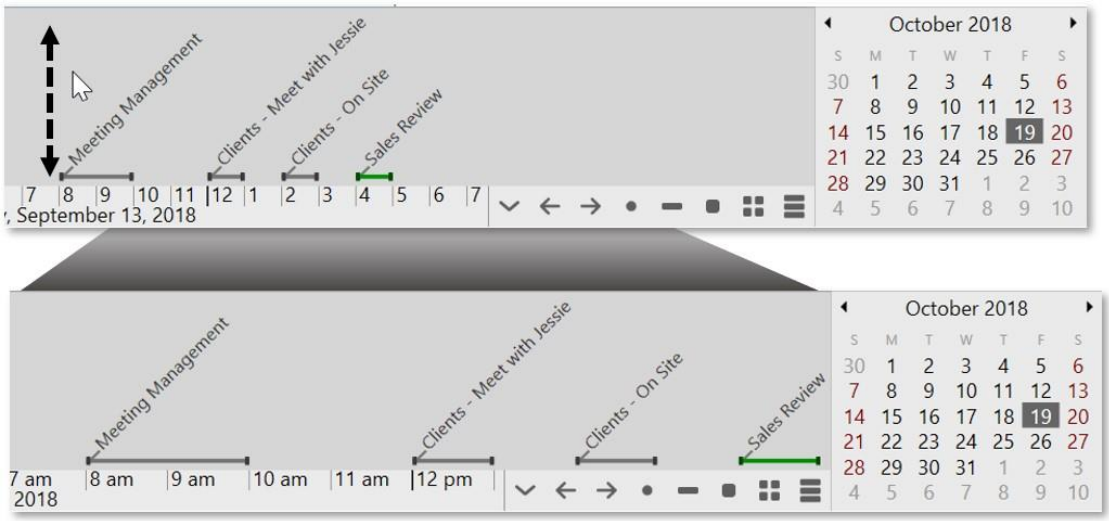



**Figure 254. Click and Drag Up and Down to Zoom**

- Drag left and right to scroll through time.
- Buttons allow you to switch between day, week, month and year view. Or, navigate to a specific day in the mini calendar.

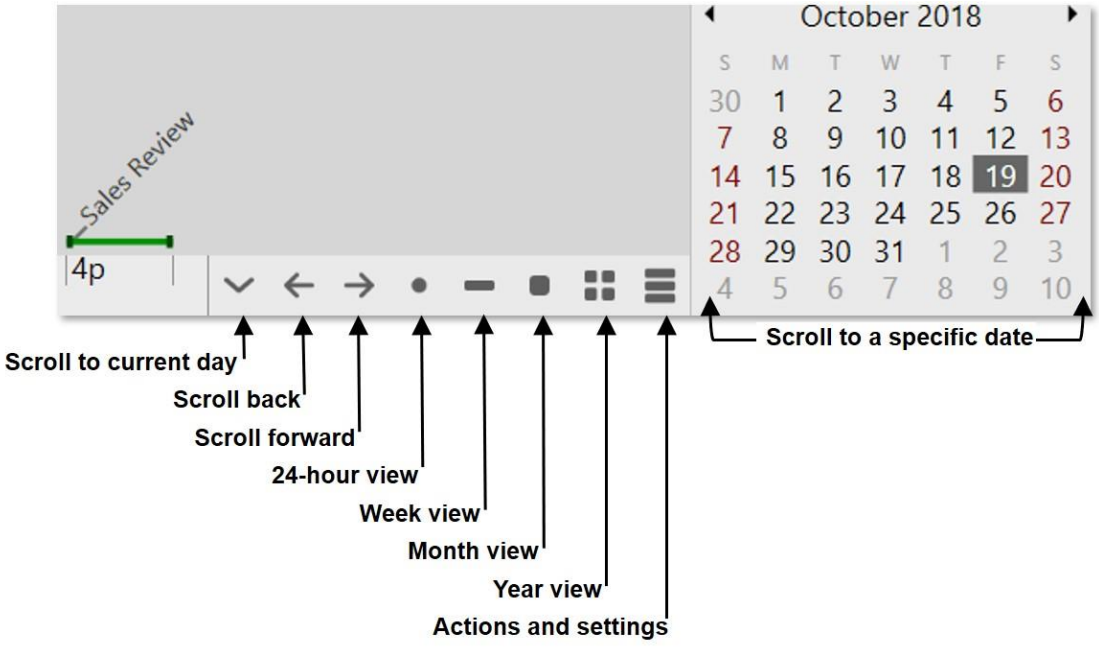



**Figure 255. TheBrain Timeline Buttons**

## Google Calendar Sync

If you're synchronizing your Brain to TheBrain Cloud with a Pro Combo account, you can also synchronize your Brain's Timeline events with Google Calendar. This will allow you to receive email reminders from Google on events originally created in TheBrain.

**To set up Google Calendar Sync in TheBrain:**

1. Open TheBrain Timeline and click the **Actions and Settings** button, then click **Google Calendar Settings**.

2. By default, your Google Calendar Settings is set to None. Click on **Manage External Accounts**, then click the **Add Google account** button. This will open https://accounts.google.com where you can select your desired Google account that will be associated with this Brain.

You can link only one Google account to your Brain.

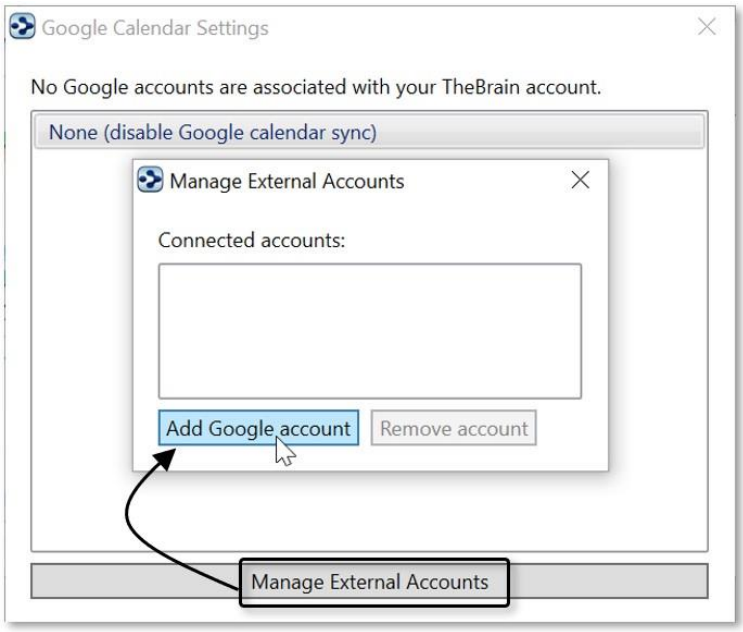



**Figure 256. Setting Up the Google Calendar Sync**

3. Google will display a confirmation window when you have selected an email address. Click the **Allow** button.

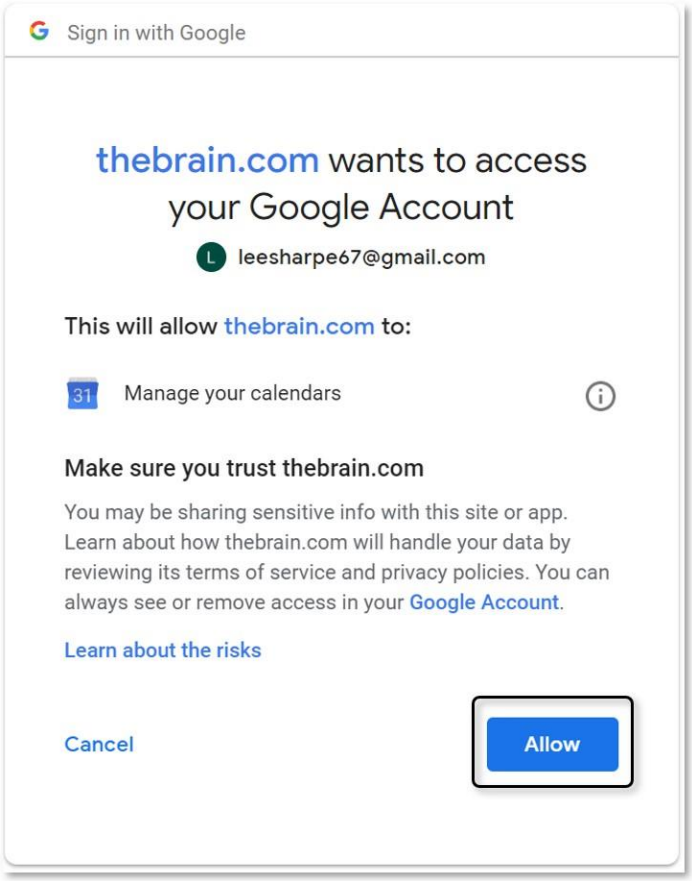



**Figure 257. Confirming Access to Google Account**

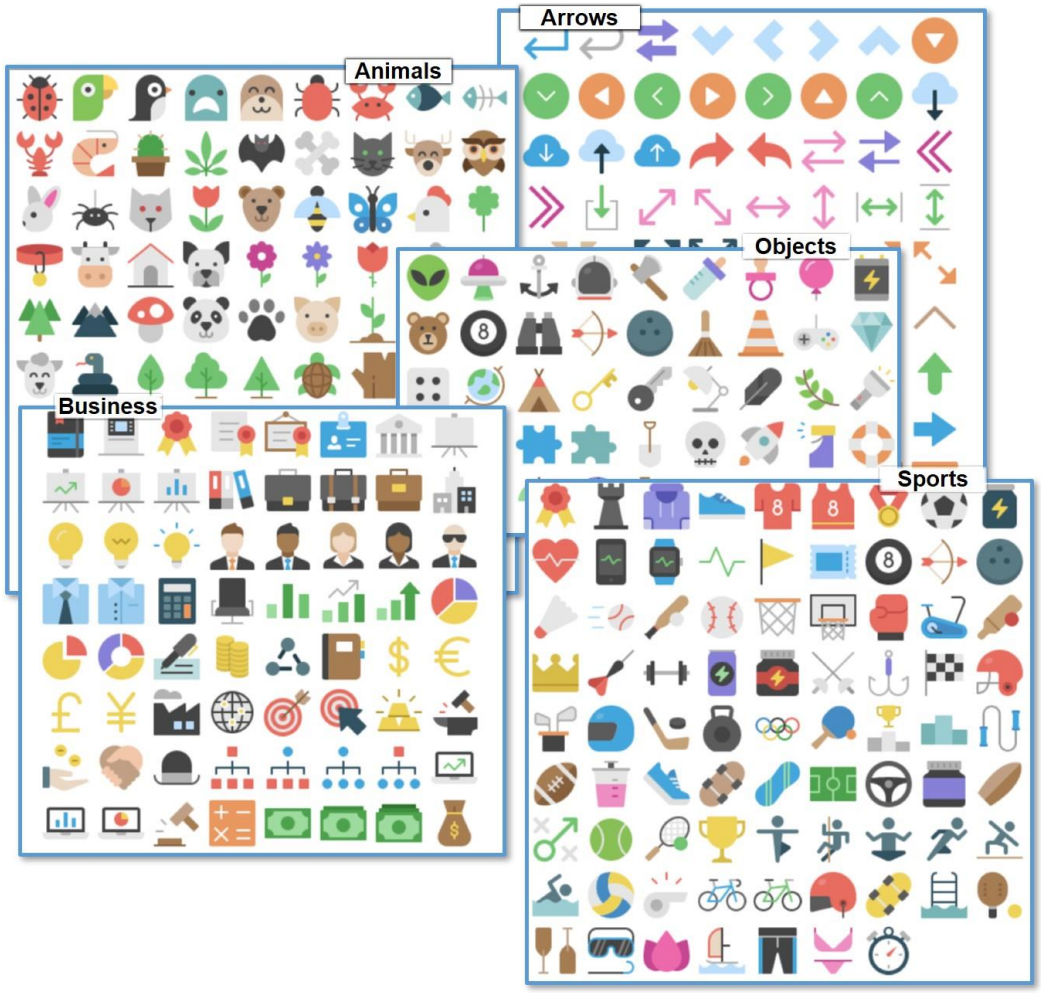
You will be prompted to close the Google Account window and return to TheBrain where the new Gmail address will appear on your **Google Calendar Settings** window.

4. Select your email address, then click the **OK** button to confirm that all events from the Google Calendar will be added to this Brain and vice-versa.

    - All new syncs to TheBrain Cloud will also include syncing your Brain Timeline and your Google Calendar.

# TheBrain Icons

TheBrain includes nearly 2000 built-in icons for your Thoughts, Types, and Tags. Choose from a 22 different categories such as Animals, Emojis, Food, Multimedia, and Technology, to name a few. Here are some examples:




**To select a Brain icon to be added to a Thought:**

1. Right-click the Thought, then click **Select Stock Icon** or open the Thought Properties dialog box, click the Thought icon box, then click the **Select Stock Icon** command.

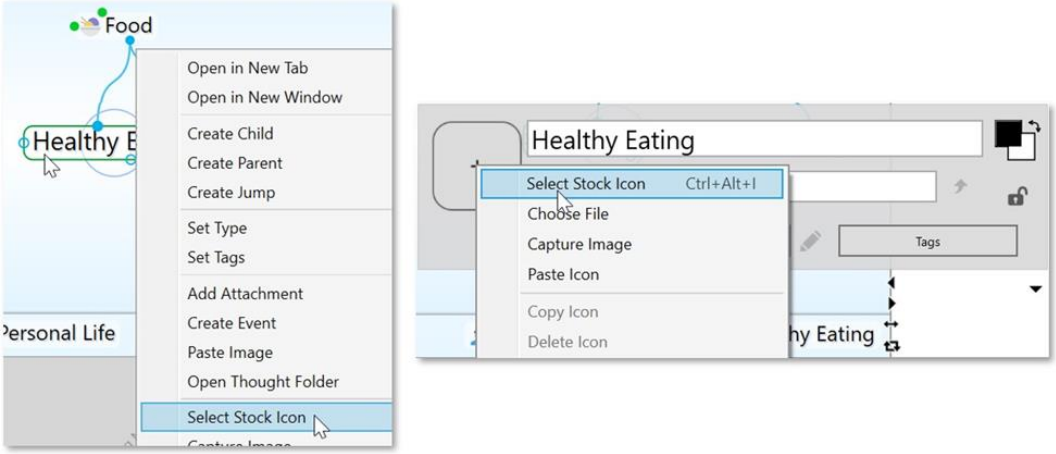



**Figure 258. Thought Context Menu**

2. Select the Browse radio button and choose a category from the list below. The name of the icon will appear when you hover over it. Click on an icon to add it to the active Thought.

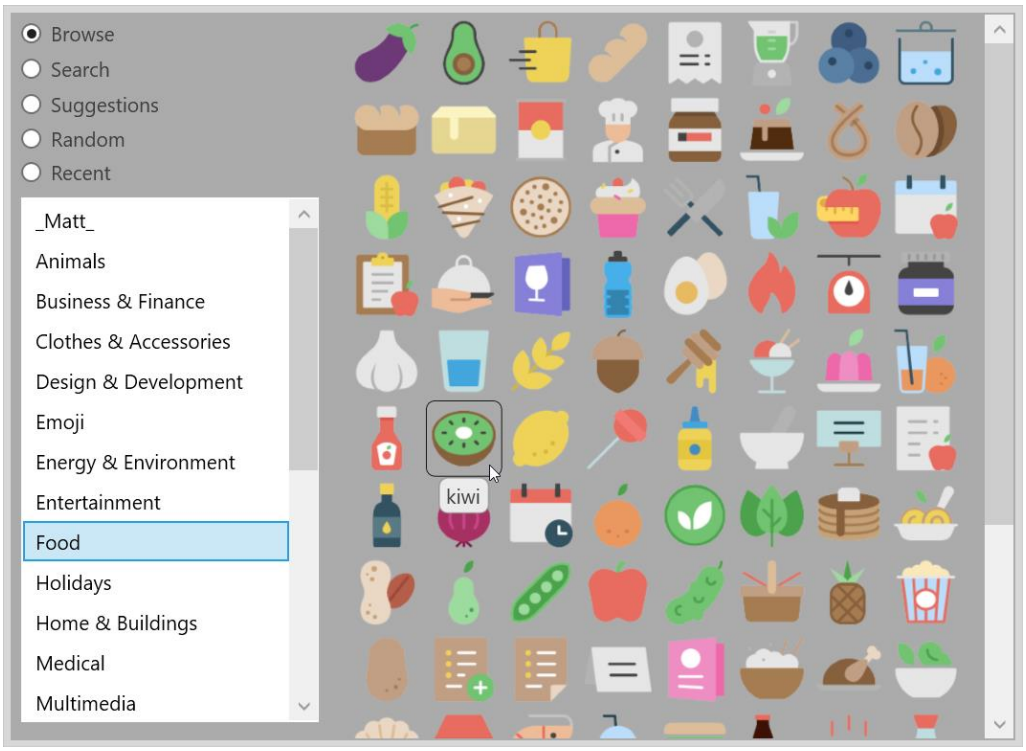



**Figure 259. The Food Category**

Additionally, you may select one of the other radio buttons:

- Search – Type a keyword to filter all icons that match that result
- Suggestions – Automatically filters the icon list by using the thought name as the search criteria

- Random – 72 random icons will appear. Click the Shuffle button to see a new set of icons
- Recent – Displays all recently selected icons

# Online Menu Options

TheBrain has a new **Online** menu in your toolbar. Now you can access your Cloud Services settings easier from your desktop client and share Thoughts and Brains quicker.

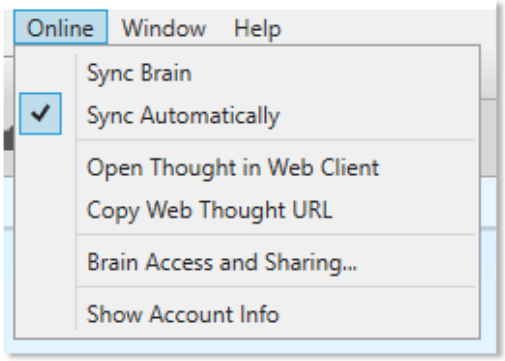



**Figure 260. Online Menu Options**

Click the **Online** menu in TheBrain's toolbar to access the following features:

**Sync Brain** – Synchronizes the current opened Brain to your Cloud account.

**Sync Automatically** – Toggle on or off automatic synchronization, once your Brain is already synchronized to your Cloud account.

**Open Thought in Web Client** – Launches a Browser window and automatically loads the current Brain/Thought from TheBrain Cloud.

**Copy Web Thought URL** – Copies the current active Thought's online URL to your system clipboard. This saves you the hassle of launching a new browser window to log into your Brain Cloud account and navigating to a specific Thought in order to acquire it's URL.

**Copy Web Thought URL** and **View in Browser** will only work if you have synchronized your Brain to TheBrain Cloud.

**Brain Access and Sharing** – This is a quick way to switch a Brain's Access Control Level (public or private), copy the Brain's online URL or grant a new TeamBrain member access. You may also type in an email address to share a read-only copy of your Brain with someone else.

**Show Account Info** – Easy access to managing your external accounts and logging out of TheBrain Cloud.

# Using Mobile Versions of TheBrain

Access your ideas and information on all your devices—including iOS and Android. TheBrain for mobile devices combines the best of note-taking, file synchronization, and mind mapping apps to give you the ultimate digital memory everywhere you go.

The iOS and Android apps include the ability to sync your Brain so you can access it without an Internet connection. Once you download your Brain locally to your mobile device, just click the **Sync** button after making edits or if edits have been made to TheBrain Cloud.

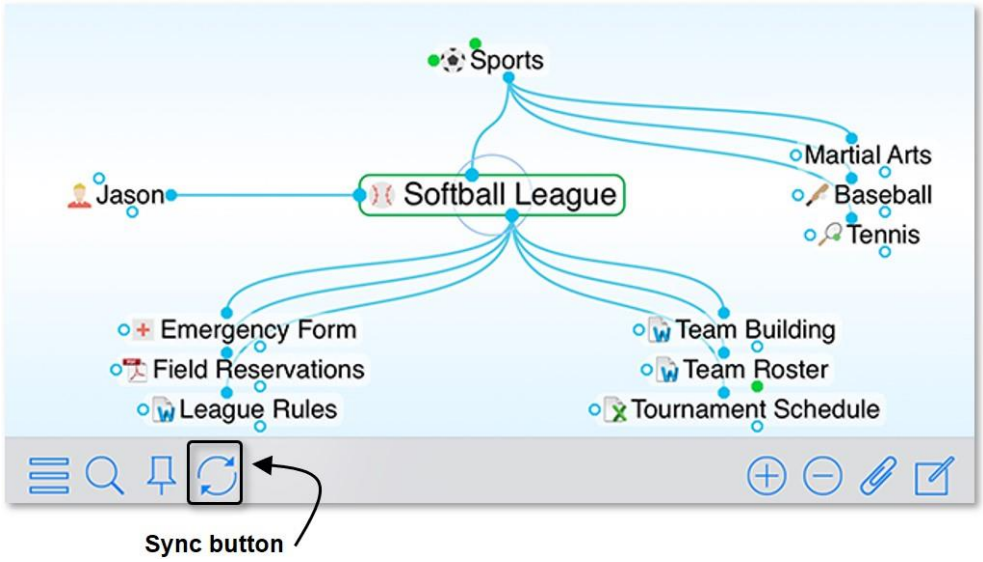



**Figure 261. Syncing TheBrain on iPhone**

TheBrain for iOS can be downloaded from the App Store at https://itunes.apple.com/us/app/thebrain-tech/id835873357?mt=8

TheBrain for Android can be downloaded from the Google Play Store at https://play.google.com/store/apps/details?id=com.thebrain.android

# Share, Synchronize, and Back Up Your Brains

You can use TheBrain Cloud to publish and share your Brain. People can view your published Brains whether or not TheBrain is installed on their machines.

**To create a Brain account:**

1. Go to http://www.TheBrain.com, then click the **Log In** button in the top-right area of the page.

**Figure 262. Sign Up Button**

2. Click the **Sign up** button.

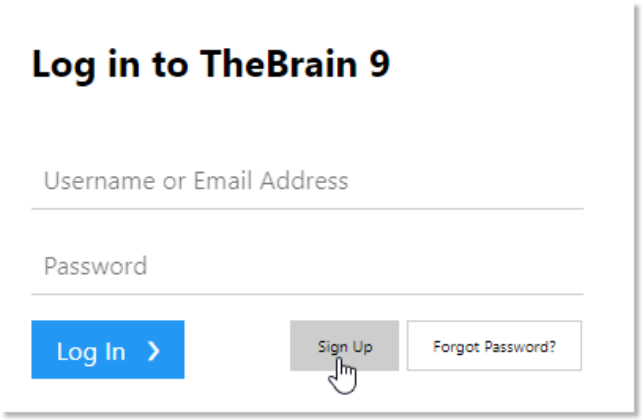



**Figure 263. Login Button**

3. Complete all fields in the **Sign Up** form, then click the **Sign Up** button. You will see a message explaining that a confirmation notice has been sent to the email address you provided. When you receive the message, follow its instructions to click the link and activate your account.

Allow a few minutes for the email to be delivered. Check your SPAM folder if the message doesn't arrive within a reasonable amount of time.

4. Now you can return to the www.thebrain.com page and click the **Login** button to log in using the information you provided when you signed up.

## Synchronizing Your Brain

With TheBrain and TheBrain Cloud Services you can use your Brain on multiple computers and synchronize changes. Any changes you make to your Brain on one machine will be reflected on every other machine through synchronization!

Cloud synchronization is protected using 128-bit AES Encryption. (This is the same encryption used by the US government to protect classified information.)

Port 443 is used for encrypted syncs. If your IT staff is using a firewall, you can ask them to add WebBrain.com and api.thebrain.com to the white list of your company's firewall. If your IT staff is using a proxy, you will need to try setting up a Proxy connection via TheBrain by using the options found in TheBrain's Preferences > System tab.

Make sure you have created an account on TheBrain.com before you begin synchronizing. Some Cloud services require a subscription fee.

**To synchronize your Brain:**

1. Open the Brain you wish to sync. Click the cloud icon in the menu bar, or click the **Online** menu, then click the **Sync Brain** command.

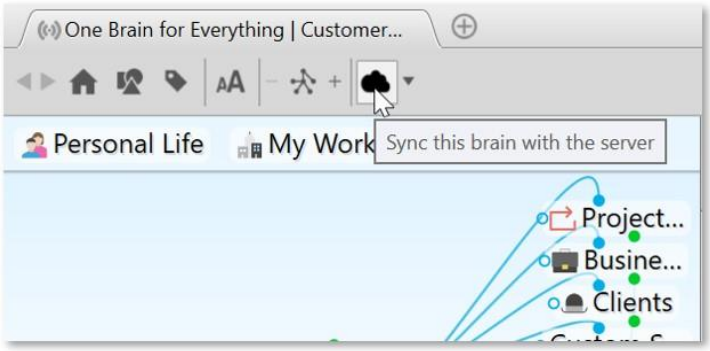



**Figure 264. The Sync Button**

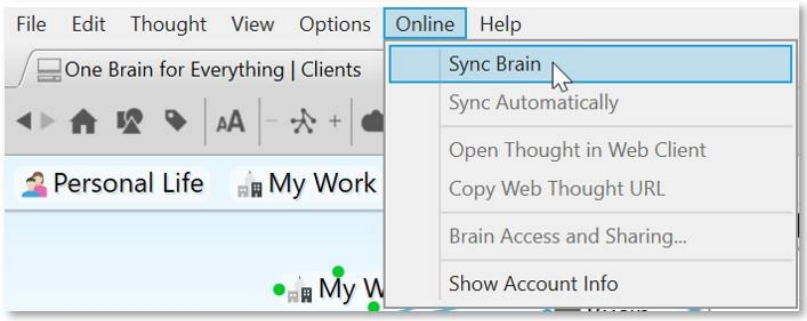



**Figure 265. Sync Brain Command**

2. Click the **Upload** button to upload this local brain.

**Figure 266. Confirming Upload**

3. A progress indicator shows you the upload is taking place, followed by a brief confirmation message.

You can keep working while the synchronization process is continuing in the background. If there is an interruption during an initial upload of your Brain, TheBrain will offer to resume from where it was stopped the next time you synchronize.

3. When the process is complete, just go to the other computer on which you want to access your Brain. Open TheBrain application and log in. From the list of available Brains, click on TheBrain thumbnail, then click the **Download** button when it appears.

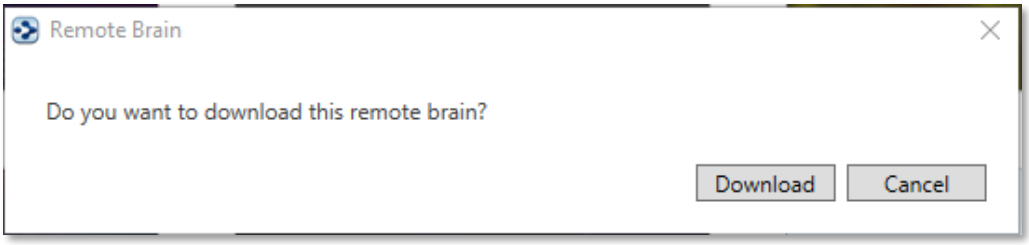



**Figure 267. Download for Local Use**

4. To synchronize at any time, click the cloud icon in the menu bar or the **Sync Brain** command in the **Online** menu. The active copy of your Brain will include the latest changes.

Once your Brain has been synced, your Brain will be automatically set to auto-sync. To turn this feature off, click the **Sync Status** button next to the Cloud icon in the tool bar.

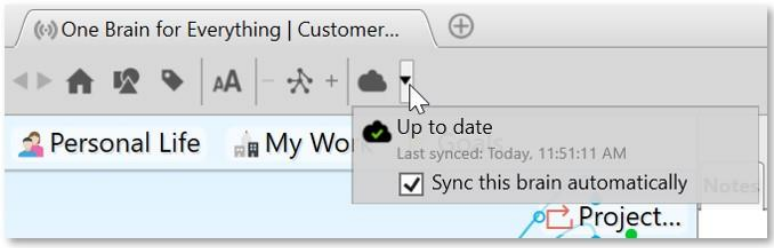



**Figure 268. The Sync Status Button**

The Sync Status will also display if local changes or online changes are available or if the sync is up to date. The last sync date will also be displayed.

Brain thumbnails in your list of available Brains will indicate if a Brain is local only, local and online (synced) or online only.

**Figure 269. Brain Location Indicators**

## Editing Your Online Brain

The desktop application has more available features than the web client, but you can still access and edit your online Brains by performing any of the following activities:

- Create and Forget Thoughts
- Change Thought locations (child to jump)
- Unlink Thoughts

- Set Pins
- Edit Notes
- Add Attachments

You can only edit Brains that YOU own.

**To edit Notes in your online Brain:**

- Click in the **Notes** tab of the Content Area and make any changes you like. The revised note will be saved automatically as soon as you click on another Thought.

## Sharing Your Online Brain

All Brains synced to https://app.thebrain.com are private and not accessible to other users without your personal log in credentials. To share a Version 10 Brain with other users:

- Open the Brain in your local desktop application
- Click the **Online** menu, then click **Brain Access and Sharing…**
- You have two different options for sharing your Brain:
  - **Option 1:** Click the **Allow Public Access** check box and **share the Web Link** with others. This is a great option for sharing your Brain with a large group of other users or other users that do not use TheBrain software. Anyone with the URL will be able to view your Brain in read-only mode in their web browser.
  - **Options 2:** Leave **Allow Public Access** unchecked and type in an email address to **invite individual users** to access your Brain. This is a good option if you want other users to be able to download a local, read-only copy of this Brain to their desktop app. The other users must have TheBrain installed and be logged in to their Brain account with the email address you specified.

**To prepare your Brain to be shared:**

1. Activate the Thought that you want to be the Home Thought when your Brain is viewed. It will be the first Thought your viewers see.
   - Right-click the Thought, then click the **Set as Home Thought** command

The current wallpaper and color theme will be included in your published Brain.

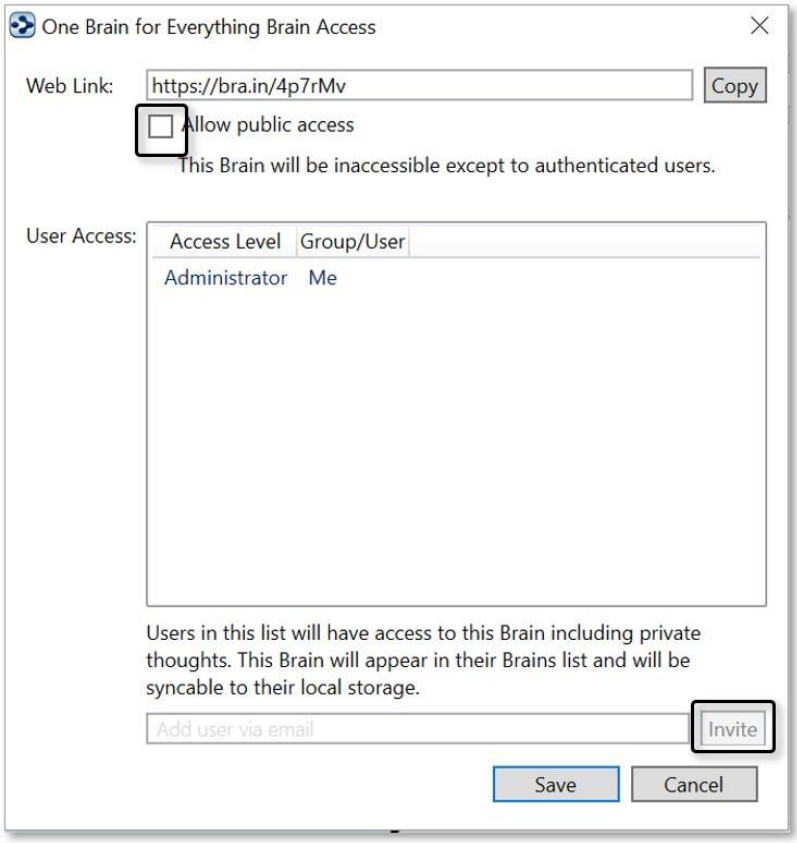



**Figure 270. Brain Access and Public URL**

## Creating a Brain Archive to Send Your Brain to Others

You can send your Brain as an email attachment. To make the attachment as small as possible, you can use TheBrain's **Backup to Brain Archive** feature to create a compact file.

**To create a Brain Archive:**

1. Click the **File** menu, then click the **Backup to Brain Archive** command.
2. In the **Backup to Brain Archive** dialog box, select either of the Access Control options.

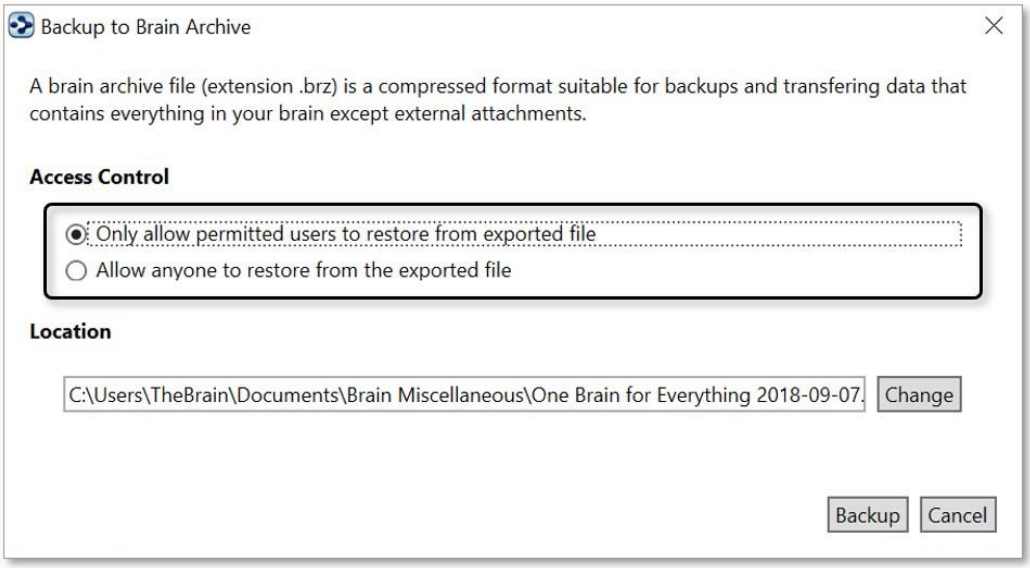



**Figure 271. Create Brain Archive Options**

3. If necessary, click the **Change** button to change the file name or the folder where the archive file will be saved. Do not change the filename extension, which is .BRZ. Click the **Backup** button to create the archive file.

Make a note of where you are saving your archive file so that you can locate it easily when needed.

A brief message will display in the toolbar area as the archive is created.

Brain Archive files are NOT .zip files. You should not use zip file utilities to modify or access your archive files as doing so may corrupt them.

## Copying Thoughts into Other Applications as an Outline

You can copy Thoughts from the Selection box into other programs such as Microsoft Word or Excel and the Thoughts will be formatted as an indented hierarchical list.

**To copy one or more Thoughts into another program as an outline:**

1. Select all of the Thoughts you want to include in the outline (**Ctrl**-click on a Thought to add it to the selection or use the commands on the **Edit** menu to quickly create a selection).

2. Right click in the **Selection Box** and then click the **Copy as Text Outline** command.

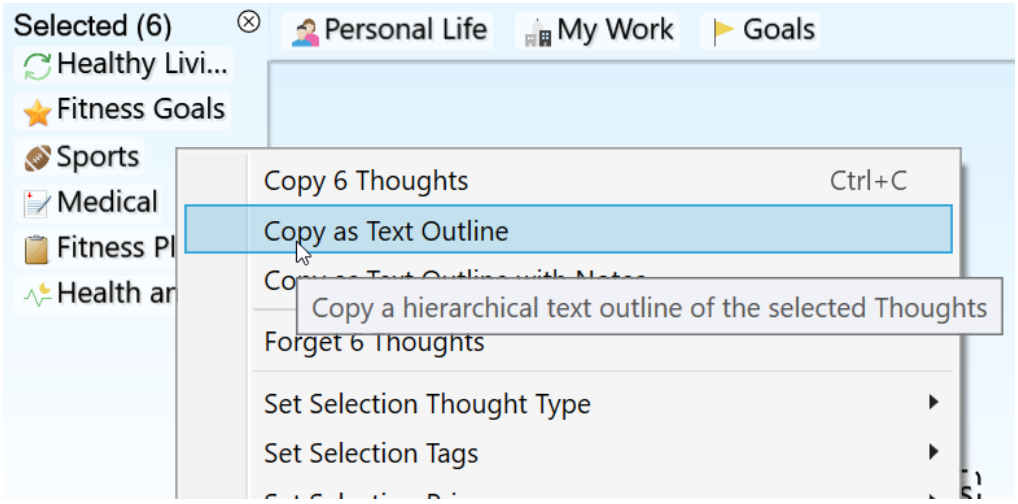



**Figure 272. Copying Thoughts as an Outline**

3. Open the other application and click where the outline version of the Thoughts should be inserted.

4. Right-click and then click the **Paste** command on the context menu (or click the **Edit** menu and then click the **Paste** command).

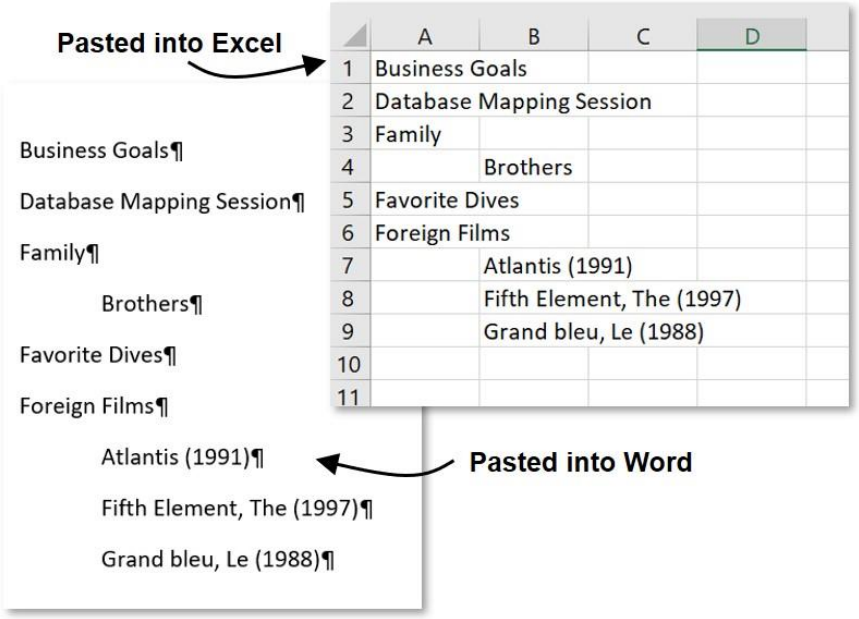



**Figure 273. Samples of Outlines Created by Pasting Thoughts from TheBrain**

## Copying Outlines with Notes

You can copy selected Thoughts along with their notes and place them in a tabbed outline.

1. Select the Thoughts to be copied, then right-click in the Selection box to open the context menu.

2. Click the **Copy as Text Outline with Notes** command.

3. Switch to Word or any other text application of your choice and press **Ctrl**-V (or use the program's command for pasting).

### Pasting a Text Outline as New Thoughts

You can select tab delineated text in another application, copy it, then paste it into your Brain. Each paragraph of text will become a child Thought (and possibly an attachment) of the active Thought, based on the formatting of the text.

Pasted outlines may include labels, attachments, and Notes. If a URL is included, it is added as an attachment to the Thought in the outline entry above the entry containing the URL

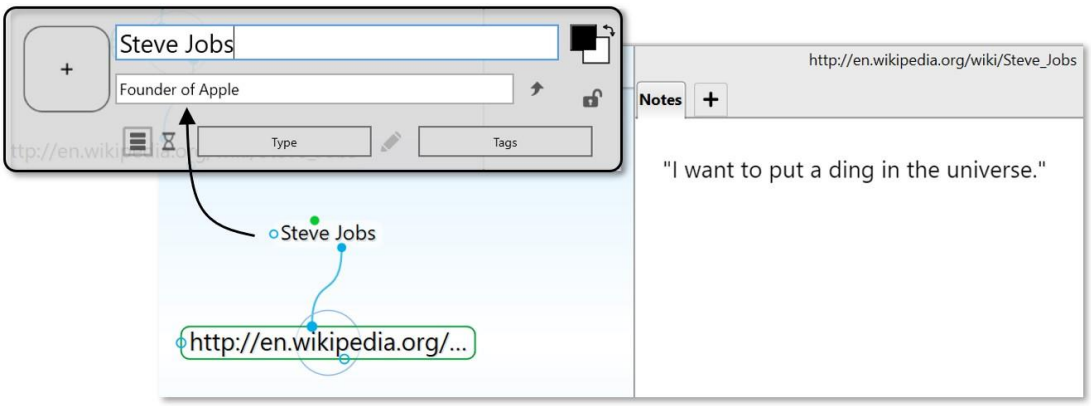
**How TheBrain converts content from the source file:**

- Each line that ends with an "Enter" or "Shift-Enter" becomes a Thought
- A multi-line paragraph with no manual line breaks becomes a Thought
- Indentation created using tabs show hierarchical relationships
- Lines starting with a hyphen (-) are added as Notes
- Lines starting with a plus sign (+) are added as web link attachments
- If a pipe (|) symbol is inserted, content to the left of the pipe will be the Thought name and content to the right of the pipe will become a label (if all content is in the same paragraph)

**Example:**

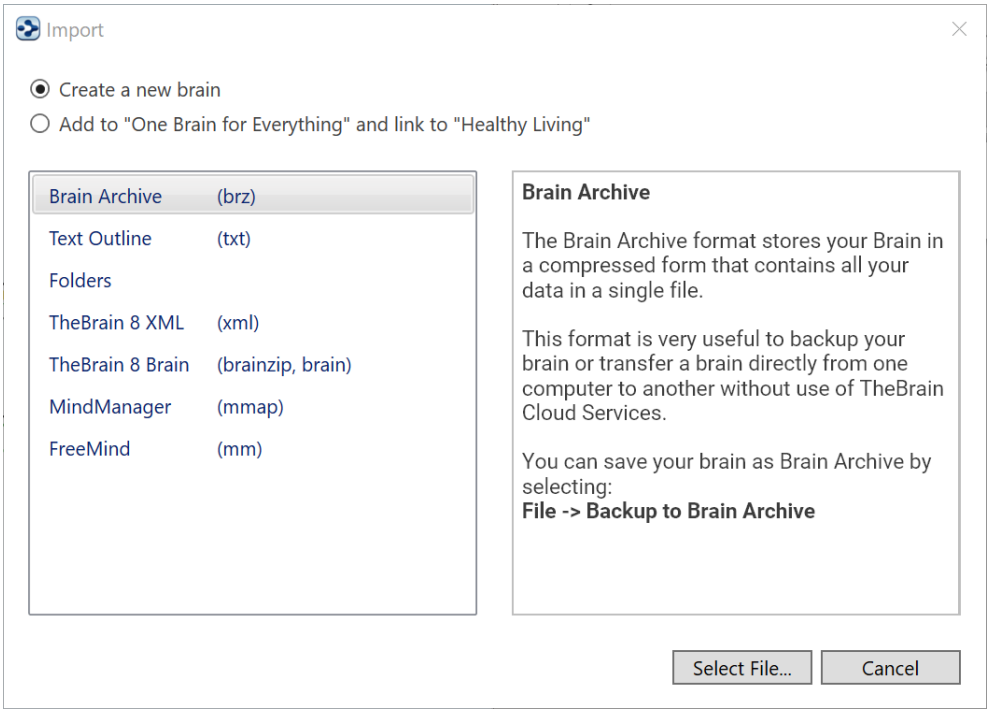
The following text adds a Thought named "Steve Jobs" with the label "Founder of Apple," a link to Wikipedia, and a Note containing a quotation.

```
Steve Jobs | Founder of Apple

        + http://en.wikipedia.org/wiki/Steve_Jobs

        -"I want to put a ding in the universe."
```




# Importing Information Into Your Brain

## Importing Folders and Mind Maps




You can import folders and Mind Maps into your Brain. When you import a folder, it becomes a child Thought of the active Thought.

**To Begin Importing:**

1. Activate the Thought that will receive the imported information.
2. Click the **File** menu, then click the **Import** command.

**For a Folder:**

- Click **Folders**, select the **Add to** … button, click the **Select Folder** button, navigate to the folder of your choice, then click the **OK** button. Click the **Import** button as soon as it becomes available. Click the next **Import** button to confirm that you understand this import can't be undone. Each folder will become a Thought, every file inside the folder will become and attachment, and any subfolders will become child Thoughts.

**For a Mind Map:**

- Click **MindManager (.mmap)**, select the **Add to** … button, click the **Select File** button, navigate to the file of your choice, then click the **Open** button. Each of the topics or ideas will become a separate child Thought of the active Thought.

## Importing TheBrain 8 XMLs

Version 8 Brains that have been exported into an XML format (or properly-formatted XML that has been generated outside of TheBrain) can easily be imported back into another Brain as a child of the active Thought.

1. Activate the Thought that will receive the imported XML.
2. Click the **File** menu, click the **Import** command, then select the **Add to** … button.
3. Click **TheBrain 8 XML**, click the **Select File** button, navigate to the file of your choice, then click the **Open** button.

## Merging Brains

You can merge two Brains together by importing a Brain Archive file (.BRZ):

1. Open the Brain that you want to merge into another Brain, click the **File** menu, then click the **Backup to Brain Archive** command.
2. Note the location for the new .BRZ file, then click **Backup**.
3. Open the Brain that will receive the merged Brain, navigate to the Thought where you want the .BRZ file to be added as a child, click the **File** menu, then click the **Import** command.
4. Select the **Add to "*open Brain name*" and link to "*active Thought name*"** option, then click **Brain Archive (brz)** in the list.

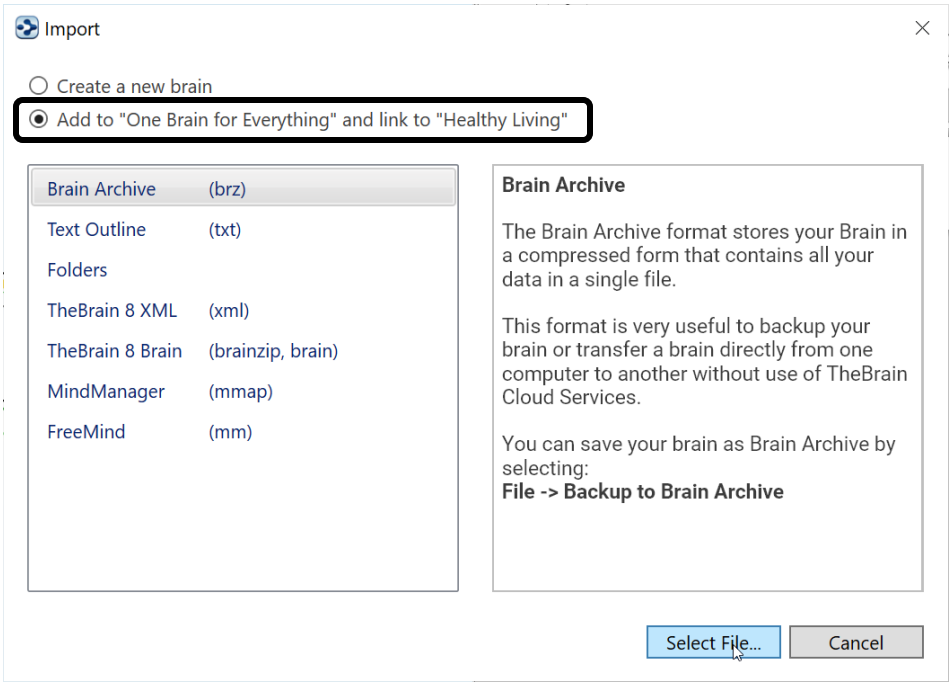



**Figure 274. Merging Brains**

5. Click the **Select File** button, then navigate to and open the initial .BRZ file you created in the first step. Click the **Import** button. You will be prompted to confirm that you want to continue, since importing a .BRZ file can't be undone.

The only Brain that is changed is the one that is open when you begin the merge procedure. The Brain you select during step 1 is not changed at all.

# Export

TheBrain 11 features several 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 containing the attachments and notes within it.
    - 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

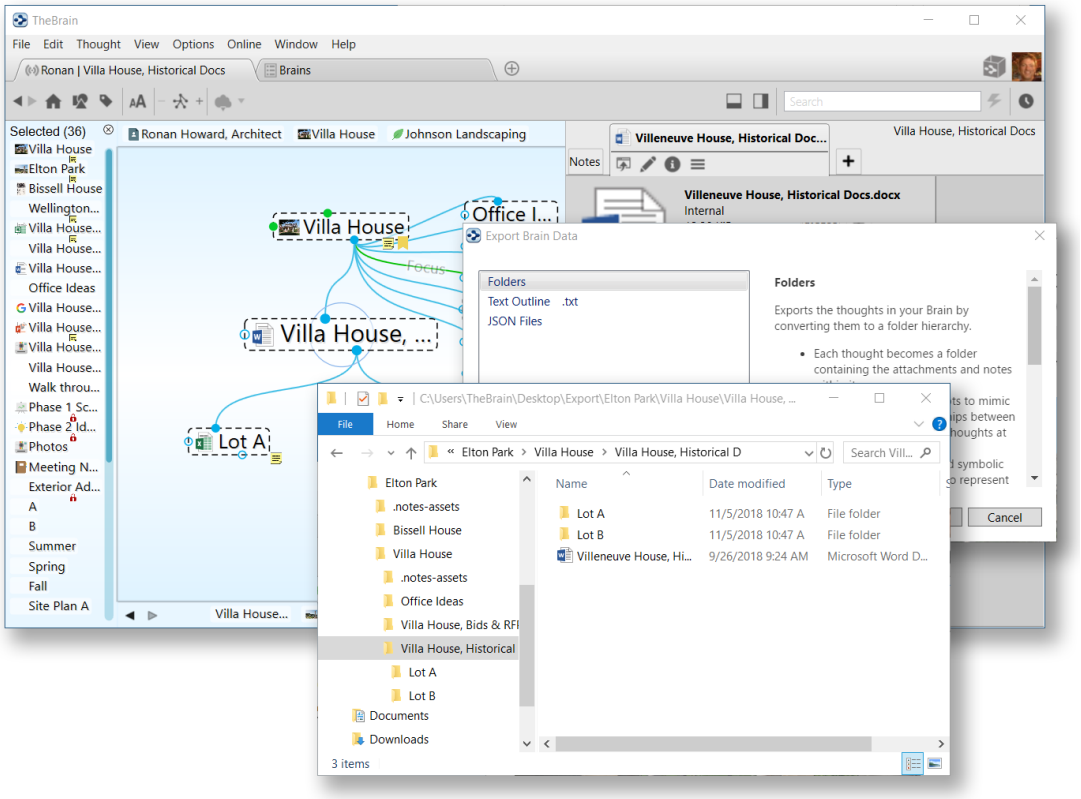



**Figure 275. Exporting a Brain to Folders**

# Glossary

| | |
|---|---|
| **Activate** | To bring a Thought to the center of the Plex and make it the active Thought. |
| **Active Thought** | The Thought you are working on right now. The active Thought occupies the center of the Plex. The active Thought's details are described in the **Thought** tab. Only the active Thought can be opened by clicking it. A Thought that is not active can be activated by clicking it, its pin, or its name in a list and pressing **Enter**. |
| **Application** | A program such as a word processor, database, web browser, game, or photo editor. |
| **Brain button** | When TheBrain window is set to Auto Hide, it disappears when you begin working in another application and is replaced by the Brain button. Click the Brain button to show the Brain window or attach files by dragging them to the Brain button. |
| **Brain** | A collection of associated Thoughts each of which can have content. TheBrain can create multiple Brains. |
| **Child Thought** | A Thought with at least one parent. Children of the active Thought appear in the child zone, below the active Thought. In turn, the active Thought is a child of any Thought that appears above it in the parent zone. |
| **Delete** | The complete removal of a Thought and/or its content from a Brain. Deletion is permanent. |
| **Drag and drop** | To use this feature, select the item you want to drag, click the mouse button and drag the item to where you want it to appear. |
| **Forget** | To remove a Thought from TheBrain without deleting it, its links, its content, or its note. Forgotten Thoughts can be "remembered." |
| **Forgotten Thought** | A Thought that is removed from TheBrain without deleting it, its links, its content, or its note. Forgotten Thoughts can be "remembered." |

**Gate** The active Thought and its close relatives have three circular “gates,” each of which is used to link to a specific relation: The parent gate is above a Thought; the child gate is below it; and the jump gate is beside it. A gate is hollow when there are no links through it, and solid when links exist.

**Home Thought** The Home Thought is the main or top Thought of your Brain. It is the Thought that is activated when you click the Home button in the Brain toolbar.

**Jump Thought** A jump Thought is linked to another Thought through its jump gate and appears in the jump zone to the left of the active Thought. Activating a jump Thought produces a more significant reconfiguration of the Plex than activating a child Thought or parent Thought. This is because jump Thoughts of the active Thought are related exclusively to the active Thought and not to other Thoughts in the Plex.

**Link** The act of connecting Thoughts thereby establishing close relations. Also, the line connecting two Thoughts in the Plex.

**Link Type** A category of links that allows you to distinguish how Thoughts are related visually. For example, you could have a Link Type called “writes” set so that links between authors and books display brown with the label “writes.”

**Navigate** To move from Thought to Thought by activating Thoughts.

**Notes** Every Thought can have Notes, displayed in the Notes tab of the Tools window. Notes can hold any combination of text, images, sound, or shortcuts. The Notes function includes a word processor.

**Parent Thought** A Thought that has at least one child. A parent Thought is linked to its child Thoughts through its child gate. The active Thought is a parent of any Thought displayed in its child zone, below it. Parent Thoughts of the active Thought appear in the parent zone, above the active Thought.

**Parentless Thought** A Thought without a parent Thought. A parentless Thought is often a jump Thought or a Thought representing a subject heading or organizer. Usually, the first Thought in a Brain (generally named after the user) is a parentless Thought.

| | |
|---|---|
| **Past Thought list** | The scrollable list of Thoughts at the bottom of the Plex, arranged in the order activated. The most recently activated Thought is the rightmost Thought in the list. |
| **Pin** | An entry point to a Brain. Click a pin to activate its Thought. A pin is created by dragging a Thought to the area immediately below the menu bar. The pin stays there until it is removed by being dragged into the menu bar or title bar. You can also create a pin of the active Thought from the Thought menu. |
| **Plex** | The visible portion of your Brain; includes the active Thought, its close relations, and the links between them. It also includes the Search box, the Past Thought List, and navigation tools. |
| **Remember** | A Thought that has been removed from the Plex by "forgetting" can be remembered by selecting Showing Forgotten Thoughts on the Options menu, right-clicking the Thought, then selecting Remember *Thought name* on the context menu. |
| **Search field** | The field to the left of the Search button at the bottom of the Plex. Type text in this field to perform an Instant Activation search. |
| **Search button** | The button at the bottom of the Plex that is used to perform an extended search for the item typed in the Search field. |
| **Siblings** | Two or more Thoughts with a common parent. When a Thought that has siblings is active, its siblings are displayed in the sibling zone, to the right of the active Thought. |
| **Template** | A file used as the basis for creating other files. Template files can be added to the window of the **Add Attachment** dialog box. |
| **Thought** | The basic unit of a Brain. A Thought can represent anything the user wants it to. A Thought can have content in the form of a file, shortcut, or web page, or it can be devoid of content and simply act as a subject heading or organizer. |
| **Thought Type** | A way to categorize Thoughts and give them distinct colors. For example, you can have a "Person" Thought type so that all Thoughts that are people display as green. |

| | |
|---|---|
| **Timeline** | The Timeline is the visual tool for using TheBrain's built-in calendar. Use it to create, edit, and view events which can be associated with specific Thoughts. |
| **Styles** | Notes may be formatted using any of TheBrain's built-in Styles, which are combinations of font, color, and size. By default, Notes appear in a style called "Modern." |
| **Unlink** | Unlink Thoughts that you no longer want to be related to any other Thought in your Brain, or when you want to remove a superfluous link. You cannot unlink a Thought's only Link to the active Thought. |
| **URL** | Universal Resource Locator; the address of a web site. |
| **Wander** | The option to step randomly through TheBrain, to let you see Thought associations. |
| **Zones** | Areas in the Plex devoted to specific relations of the active Thought. There are four zones: the parent zone above the active Thought, the child zone below it, the jump zone to its left, and the sibling zone to its right. |

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