



Version 12

## **Transitioning to TheBrain Version 12**

March, 2021

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# Introduction

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Welcome to TheBrain 12! Just when you thought your Brain couldn't get better, TheBrain 12 makes connecting information virtually effortless. With seamless discovery of related content, automatic display of backlinks, and a redesigned Content Area, your ideas and knowledge will come to life like never before.

TheBrain 12 new features include:

-  Sleek New Redesign of the Content Area
-  Viewing Related Thoughts in the Content Area
-  Faster Ways to Create Thoughts and Links
-  Viewing Attachments in Slideshow Mode
-  Dragging and Dropping Images, Links, and Text within Notes
-  Merging Thoughts
-  Encrypting Individual Attachments
-  And many other enhancements ...

**A video overview of these features is available at**

**<https://www.thebrain.com/TheBrain12>**

## About this Guide

This guide covers the new features and changes in TheBrain 12 that have been made since version 11. It is intended for people who are already familiar with version 11.

# Redesigned Content Area

You'll find that the Content Area is now simpler, with a more space-efficient design.

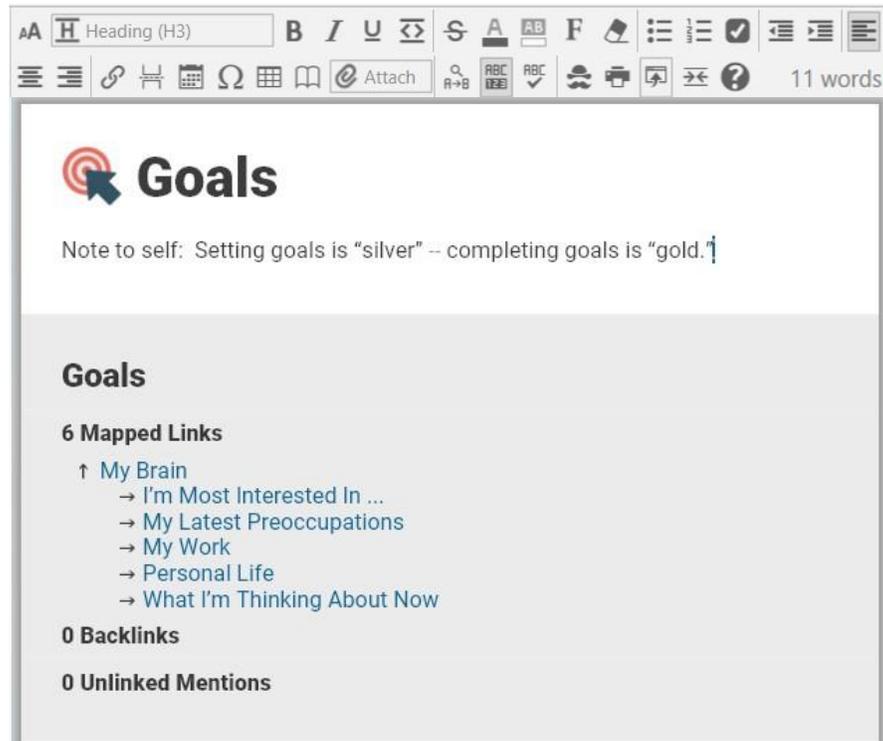


Figure 1. The Content Area

Specific enhancements include:

- **Increased speed**—all types of attachments are added more quickly.
- **Improved drag and drop for attachments**—the Thought name is highlighted as you drag and drop, and once dropped, the attachment shows below the Thought name, instead of on a separate tab.

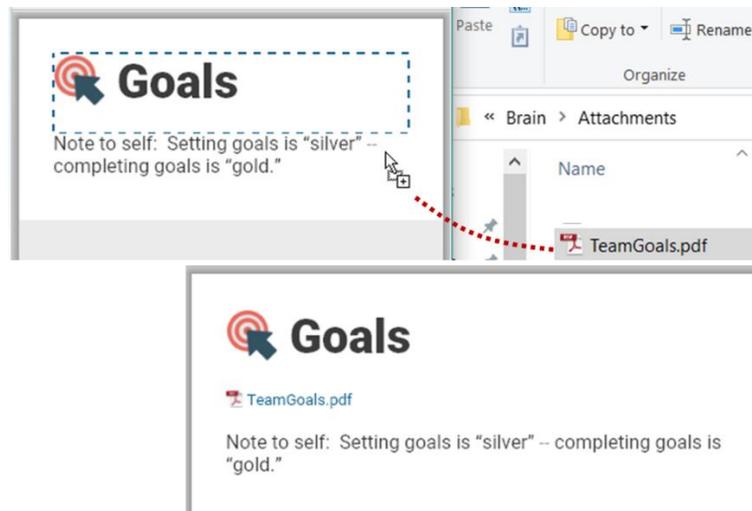


Figure 2. Dragging and Dropping an Attachment

- **You can insert images and URLs directly into Notes**—just drag and drop the item within the body of the text area.

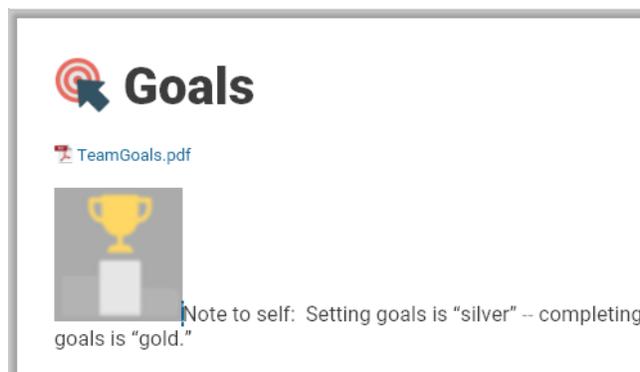


Figure 3. Dragging and Dropping an Attachment

- **Events are shown directly in the Content Area**—previously, they were listed on a separate **Events** tab within the Content Area.

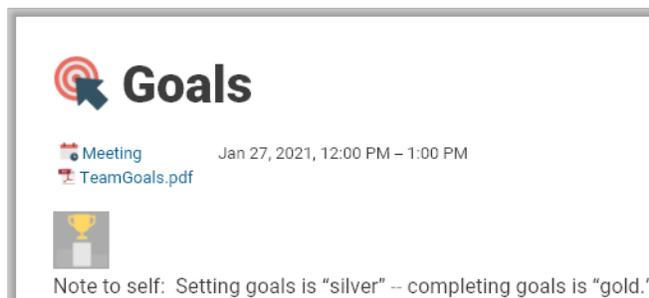
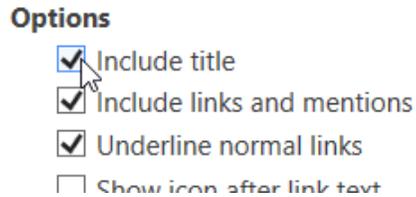


Figure 4. Events Appear at the Top of the Note

- **The Thought name appears as a title at the top of the Content Area**—and, of course, if you edit the title here, the Thought is renamed globally, and vice versa. You can hide the title using the **Include title** option on the **Notes Editor** tab in **Preferences**.



**Figure 11. Show or Hide the Thought Title in the Content Area**

- **Enhanced web content display**—web pages from URLs in Notes are displayed in TheBrain’s embedded browser.




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The **BrainBox** also utilizes this redesigned Content Area. You can also give the **BrainBox** its own tab by clicking its icon, then selecting **Open in New Tab** in the context menu.

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## Collapsing and Expanding Notes Sections

Now you can collapse sections of your Notes based on headings, tables, and list items. This helps you navigate through large documents more easily. Collapsing lets you focus on a particular area while writing or reviewing content. When you’re ready, you can expand any or all sections.

### Two ways to expand or collapse Notes sections:

- Hover over the area to the left of the Notes, then click the down-arrow to the left of the section to collapse the entire list. This symbol will become a right-arrow which you can click to expand the section.

Or

- Right-click in the Notes area, then click an option of your choice. Optionally, before you right-click, click in a specific section if you want to collapse or expand just that section.

Choices on the context menu include: **Collapse All Except Here**, **Expand All**, **Collapse All**, **Expand Here**, and **Collapse Here**.

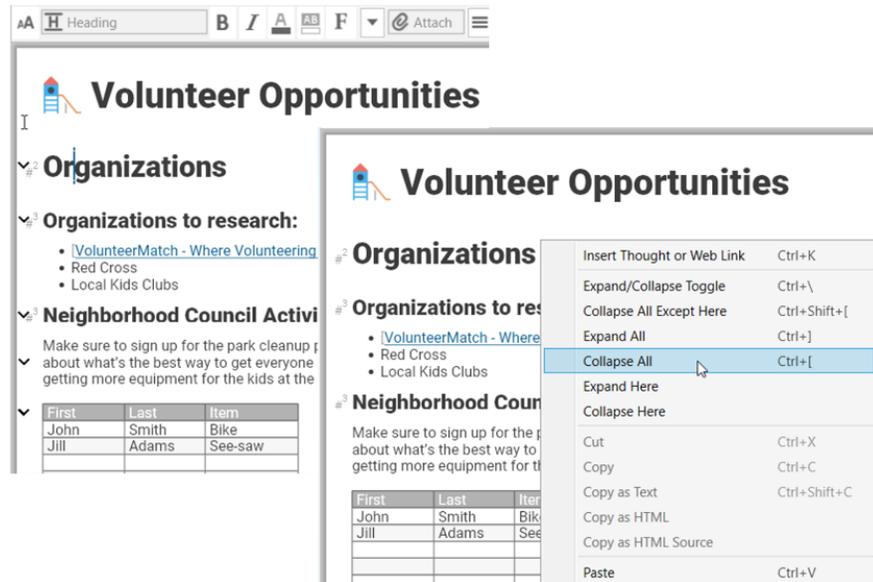


Figure 5. Options for Expanding or Collapsing Note Sections

## View Related Thoughts in the Content Area

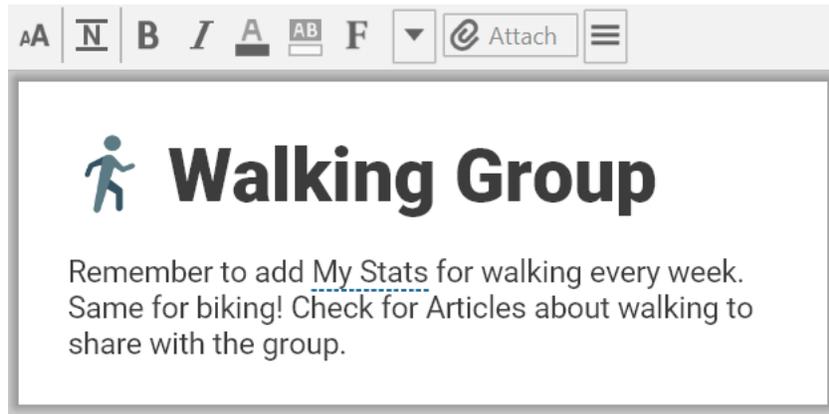
Have you ever wondered whether content in one Thought's Note is referencing another Thought in the same Brain or even if the Thought you are on is being referenced in another Note—but you figured it might be too complicated to go searching? You'll love these new features. In TheBrain 12, without doing a thing, you'll instantly be presented with all related Thoughts in the Content Area.



Related Thoughts do not have to be visible in the Plex in order to display in the Content Area.

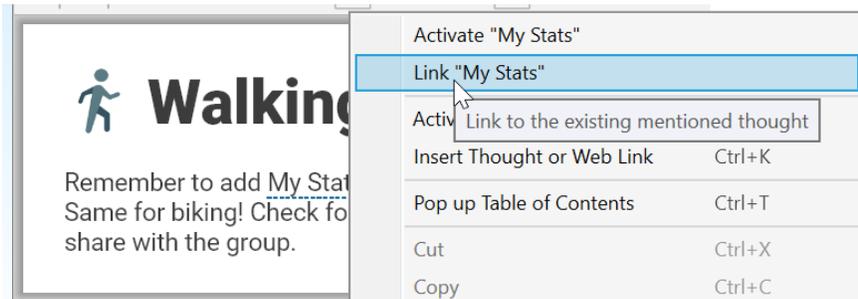
### Thought Mentions

When a Thought name appears within Notes, your Brain recognizes it automatically as a "mention." Both plural and singular forms of the text are recognized, so exact matches are not required.



**Figure 6. A Thought Mention Underlined in a Note**

Right-click on a Mention in a Note to either link to or activate this Thought.



**Figure 7. Context Menu When Right-Clicking on a Mention**

Below the Note, users have the option of displaying more related content within the same Brain by opening Mapped Links, Backlinks, or Unlinked Mentions in a footer that can appear below the Note:

- Mapped Links:** Thoughts that are connected in the Plex as parents, children, jumps, or siblings (but do not necessarily have text in common)
- Backlinks:** Thoughts whose Notes link to the active Thought
- Unlinked Mentions:** Thoughts whose Notes contain the name of the active Thought—even if not explicitly linked

While mapped links refer to Thought names, backlinks and mentions display both the names of the related Thoughts and the context of the Notes in which they appear.

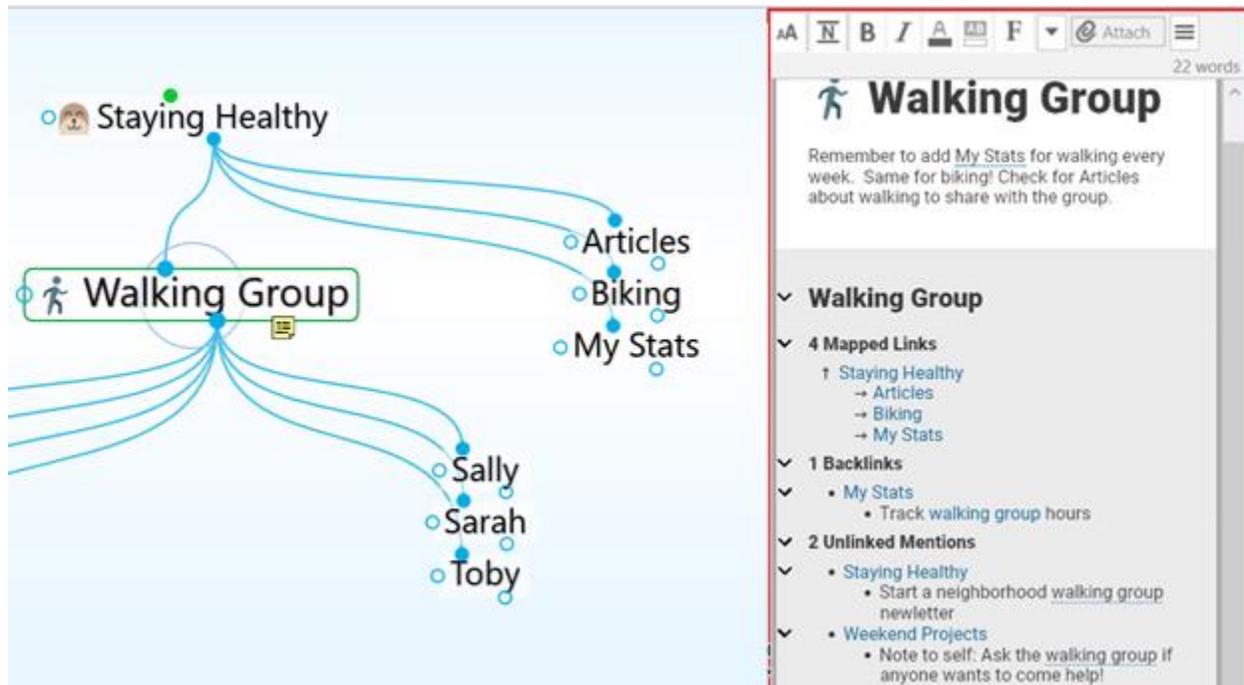


Figure 8. Content Area with Related Thoughts in the Footer

## Using Related Thought Links

You can open any related Thought by clicking its link in the Content Area footer. This enables you to add content to one Note from another via links or mentions.

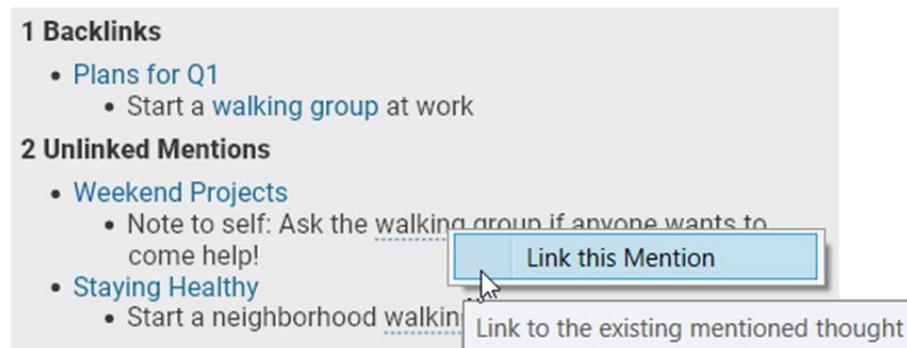


Figure 9. Two Kinds of Links for Related Thoughts

- Click a solid **blue link** to activate that Thought.
- In the footer, click a **dashed underline** link to display the **Link this Mention** command. Once it's linked to the existing mentioned Thought, it will move from the **Unlinked Mention** section to the **Backlinks** section in the Content Area.

**2 Backlinks**

- [Plans for Q1](#)
  - Start a [walking group](#) at work
- [Weekend Projects](#)
  - Note to self: Ask the [walking group](#) if anyone wants to come help!

**1 Unlinked Mentions**

- [Staying Healthy](#)
  - Start a neighborhood [walking group](#) newsletter

Figure 10. After an Unlinked Mention is Linked



Note that while links appear in **blue** by default, you can easily change their color. To do so, select **Brain Theme** in the **Options** menu, then click the color of your choice on the **Colors** tab for the **Links** entry. Click **Save Theme** to save your change.

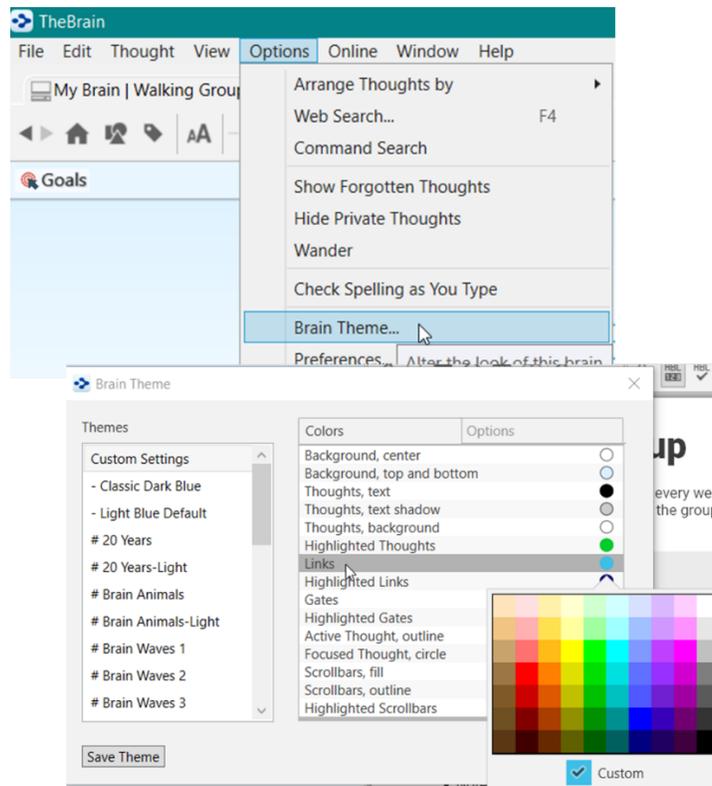


Figure 11. Changing Link Color for the Current Theme

## Hiding or Showing Related Thoughts

To hide mapped links, backlinks, or unlinked mentions in the Content Area:

- Right-click below the Notes, then click **Show Mapped Links**, **Show Backlinks**, and/or **Show Unlinked Mentions** in the context menu.

To restore the Thought names and/or links and mentions:

- Right-click within the Notes area and click **Show Mapped Links**, **Show Backlinks**, and/or **Show Unlinked Mentions** in the context menu.

Note that hiding or showing related Thoughts is global and applies to your entire Brain.

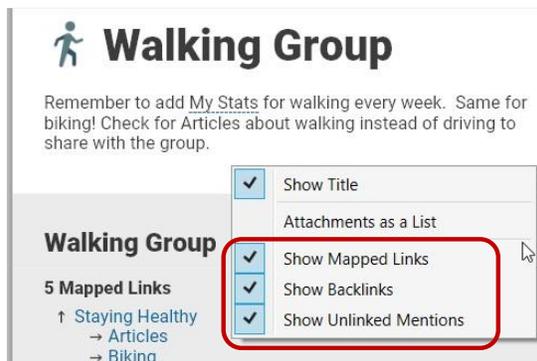


Figure 12. Context Menu Below Notes

You can also use the **Notes Editor** tab in **Preferences** to hide or display links and mentions in the Content Area.

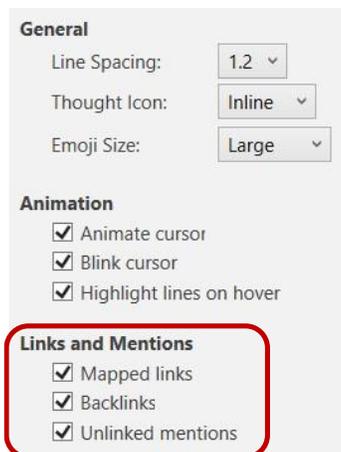


Figure 13. Links and Mentions Section in Notes Editor Preferences

## Collapsing and Expanding Related Thoughts Sections

When you hover over the area to the left of the related Thoughts, you'll see down- and right-arrows.

- Click the down-arrow to the left of the current Thought name to collapse the entire list. This symbol will become a right-arrow which you can click to expand the entire list.
- Click any other down- or right-arrow to expand or collapse that section or item.

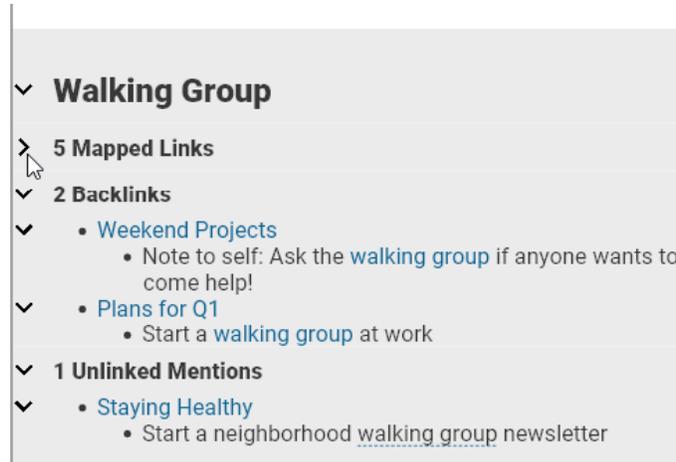


Figure 14. Collapsing or Expanding Sections

You can also collapse and expand sections within Note text in a similar way when Heading styles are used (see *Collapsing and Expanding Notes Sections* on page 4).

## Aggregating Content

The data in your Brain can be aggregated automatically with just a few simple mechanics. When data is aggregated you can see content from Notes about the same subject throughout the Thoughts in your Brain all at the same time. This ability is powerful and magical!

In the example below, the four backlinks comprise every Note that begins with a “George” heading throughout the Brain, organized by the name of the Thought that contains one or more “George” headings.

The screenshot shows a user profile for "George". At the top, the name "George" is displayed in a large, bold font. Below it, there is a short bio: "Board member and buddy ...", followed by the address "121212 N. 1st, Unit 10" and the phone number "(555) 515-1515". Below the bio, the name "George" is repeated in a smaller font. Underneath, there are two sections: "2 Mapped Links" with a link to "Board" and "4 Backlinks". The backlinks section is highlighted with a red border and contains four items: "Jill" (with a sub-link to "George" and a snippet about tagging parking violators), "Landscaping" (with a snippet about arranging tours), "Parking Committee" (with a snippet about raising fees), and "What I'm Thinking About Now" (with a snippet about meeting frequency).

Figure 15. Aggregated Data for “George”

**To prepare data to be aggregated:**

1. Create a Thought whose name represents the information you want to see aggregated. In the Figure 15 example, that Thought name is “George.”
2. In any Thought that has information about “George” (following this example), precede the information with a standalone paragraph. This paragraph should simply have the text that matches the name of the Thought for which you want aggregated data—“George” in our example. The text should be attached to a Heading style.

The screenshot shows a thought titled "Landscaping" in a large, bold font. Below the title, there is a heading for "Jill" in a smaller font, followed by the text "Wants to interview a new crew". Below that, there is a heading for "George" in a smaller font, which is highlighted with a red border. Below the "George" heading, there is the text "Would like to arrange tours through the better-looking patios".

Figure 16. “George” is Formatted as a Heading 3

3. Link the Heading by right-clicking it, then selecting **Link (Thought name)**.

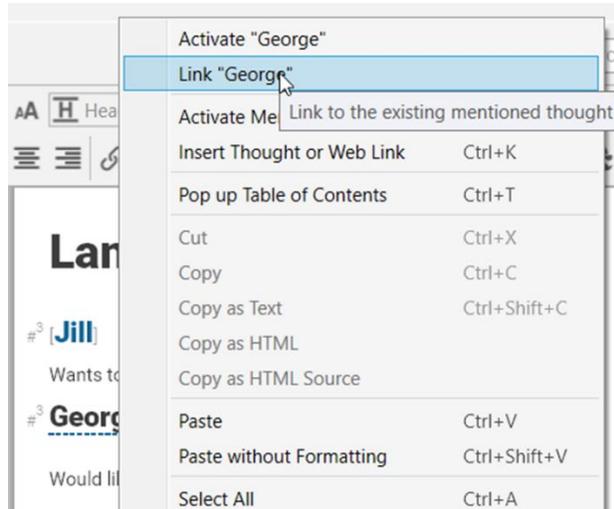


Figure 17. Linking the Heading to the Thought of the Same Name

4. In this scenario, the backlink content on the George Thought will display all text until it comes to the next #3 (Heading) formatted text.

Any time you activate the “George” Thought, you’ll see the information aggregated, as in Figure 15.

## View Attachments as a Slideshow

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The new Next and Previous navigational arrows in the top-right corner of the Content Area toolbar make it easy to browse through attachments or pictures within your Notes.

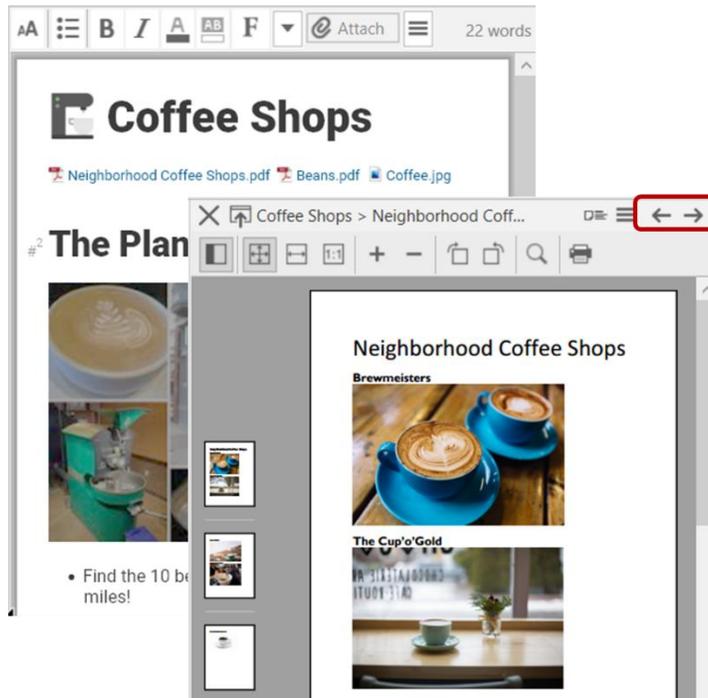


Figure 18. Next and Previous Arrows

**To view attachments as a slide show:**

- Click the first attachment, then click the Next button to display the next attachment.
- For multi-page attachments, click a thumbnail to jump to a specific page.
- To return to the Notes, just click the Close button (X) at the start of the Notes toolbar (or keep clicking the Previous button until the Notes appear).

**To view pictures in Notes as a slide show:**

- Double-click the image you want to see first to maximize it, then click the Next button to display the next picture.

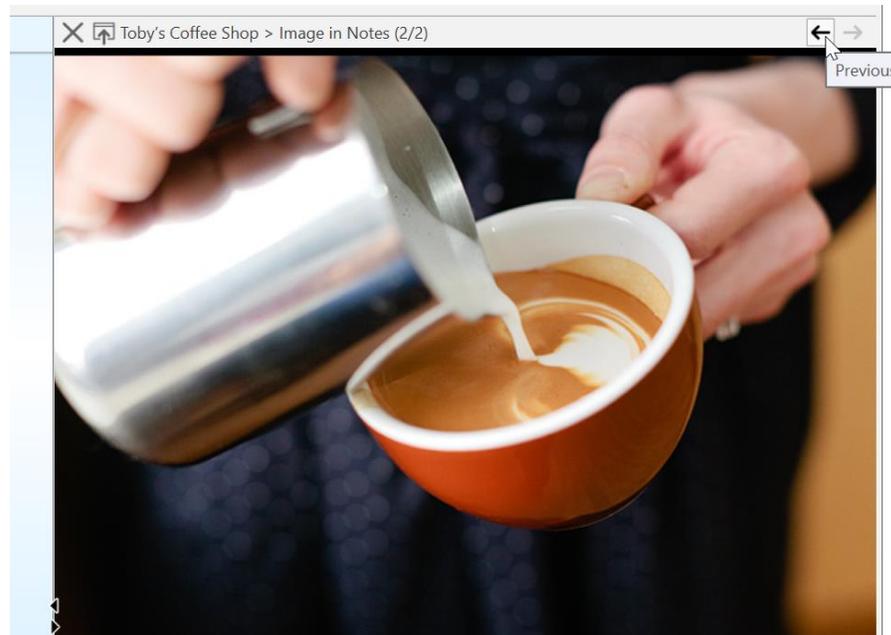


Figure 19. A Picture from Notes in Slideshow mode

## Quick Thought Creation

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Now you can create a new Thought instantly from the Search box or within Notes or Events.

Say you'd like a "Monthly Meetings" Thought to be a child of "My Work," but you're not sure whether you already have a Thought with that name. You can begin by searching, and if it doesn't already exist, no need to retype the name.

### To create a new Thought using search:

1. Activate the Thought that should be the parent, child, or jump Thought of the new Thought.
2. Click in the Search box at the top-right corner of the window, then type the name of the Thought you're looking for, or want to create if it's not found.
3. If the Thought doesn't already exist and you want to create it:
  - Press the **Enter** key to create it as a child of the active Thought, or
  - Hold down the **Shift** key as you press the **Enter** key to create it as a parent of the active Thought, or
  - Hold down the **Ctrl** key as you press the **Enter** key to create it as a jump Thought of the active Thought, or

- Hold down the **Ctrl** key as you press the **Shift** key, then click on **Create Orphan** to create it as an orphan Thought

Your new Thought will be the active Thought.

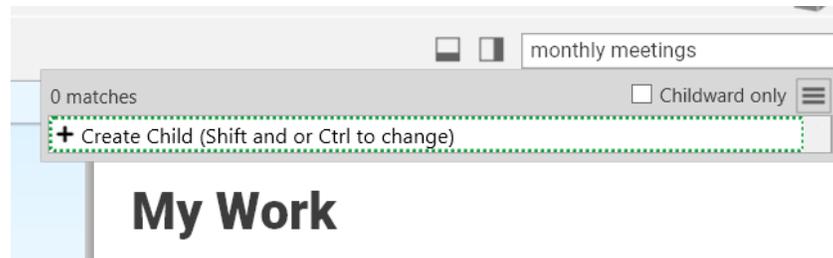


Figure 20. Creating a Thought from the Search Box

**To create a new Thought when searching finds an existing Thought:**

1. Press the **up-arrow** key. This highlights the default option—Create Child. Note that pressing the **Enter** key before pressing the **up-arrow** key activates the existing Thought.

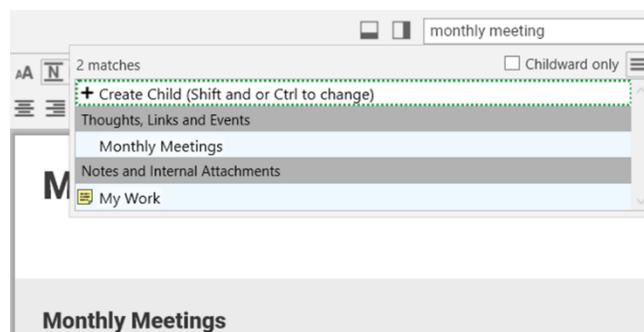


Figure 21. Creating a Thought from the Search Box when the Thought is Found

2. Use any of the same key combinations for creating a new Thought from the Search box when a Thought isn't found.

**To create a new Thought from within a Note:**

1. Select the text within the Note for which you want to create a child, parent, or jump Thought.
2. Right-click the selected text, then click the **Insert Thought or Web Link** command. Optionally, you can revise the text in the new box that appears, if you want a different name for the new Thought.

3. Select a relationship for the new Thought:

- Press the **Enter** key to create it as a child of the active Thought, or
- Hold down the **Shift** key as you press the **Enter** key to create it as a parent of the active Thought, or
- Hold down the **Ctrl** key as you press the **Enter** key to create it as a jump Thought of the active Thought

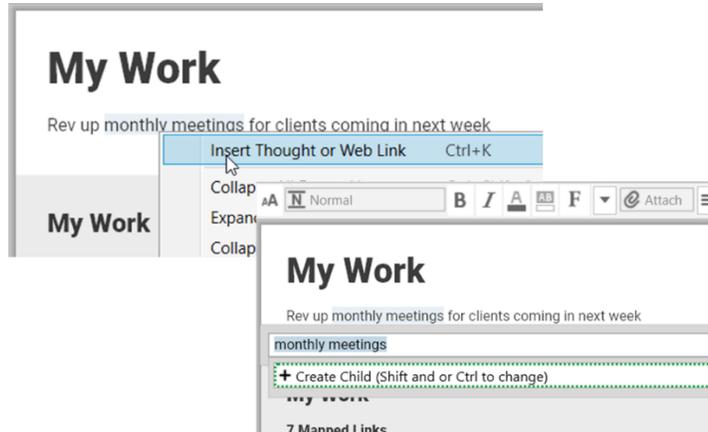


Figure 22. Creating a Thought from a Note

To create a new Thought from within an Event:

1. Open an existing Event or click and drag from the start to finish times in the timeline to create a new Event.
2. Type a name for the new Thought where you see “No thought or link” at the top of the Event box. A new orphan Thought will be created with that name.

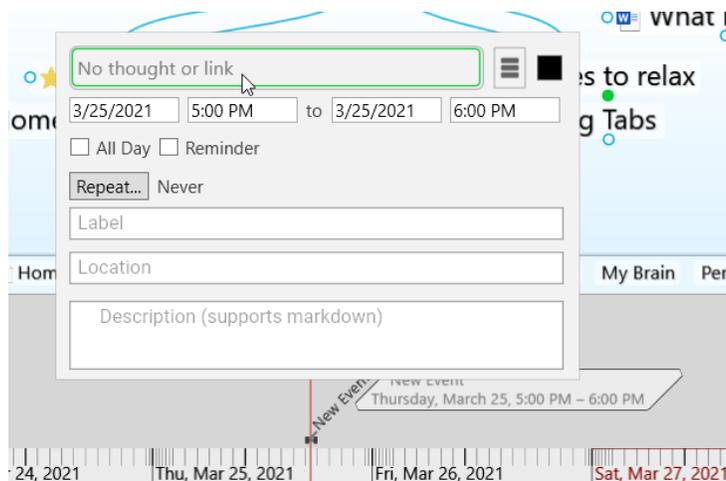


Figure 23. Creating a Thought from an Event

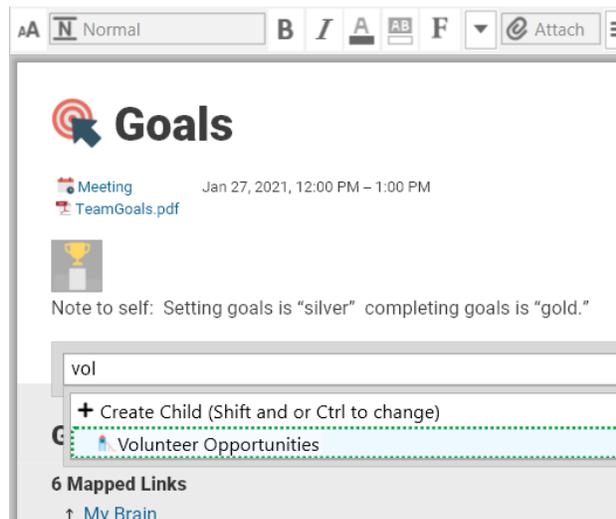
# Fast Linking and Creating from Notes

Pressing **Ctrl/Cmd+K** is a shortcut to:

- Insert a link to an existing Thought
- Create a new Thought
- Link to a URL
- Edit or remove a link

**After you press Ctrl/Cmd+K:**

1. An edit box opens so you can begin typing a URL or the name of the Thought you want to perform any of these activities on. Or, if you select text or a URL first, that text will appear in the edit box.
2. Double-click the entry that appears to insert a link to that item in the Note. For example, double-clicking “Volunteer Opportunities” in the example below creates a link to that Thought in the Notes for Goals.



**Figure 24. The Ctrl/Cmd+K Shortcut**

2. If an existing link is selected, you're ready to begin editing it. To remove the link, just delete its name in the edit box.
3. If you type a URL, it will be inserted.

The link command includes all the features of **Quick Thought Creation** so you can insert all types of relationships easily.



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Alternatively, you can type `[]` to link or create thoughts.

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## Using Drag and Drop within Notes

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Now you can move images, links, and text in a Note via drag and drop. You can also drag Note content to external applications.

### To move text:

- First select the text, then drag the selection

### To move an image or link

- Start dragging it, then drop it when the cursor is where you want the image or link to be

Want to stop dragging? Just press the **Escape** key.

## Other New Notes Features

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You'll find the following when you begin using Notes in TheBrain 12:

- Thought and URL links have a cleaner look—the trailing icon is gone.
- When Note text is selected and you paste in a URL, the selected text is automatically linked to the URL.
- By default, “smart quotes” (differentiated quotation marks) are inserted automatically. This means that the opening quotation mark looks different from the closing quotation mark you insert before and after words or phrases.
- When you rename a Thought, any references to it from other Notes are automatically updated with the new name.
- You can create your own keyboard shortcuts to switch text justification in Notes between left, center, and right. Go to the **Keyboard** tab in **Preferences** and expand the **Notes** section.

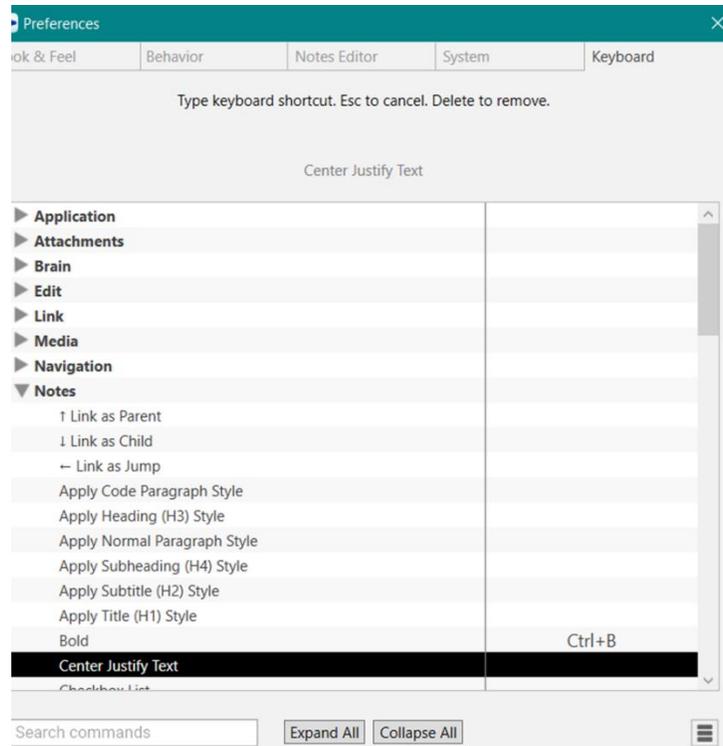


Figure 25. Creating Keyboard Shortcuts for Text Alignment in Notes

- You can toggle to a "compact" Notes toolbar from the toolbar itself.

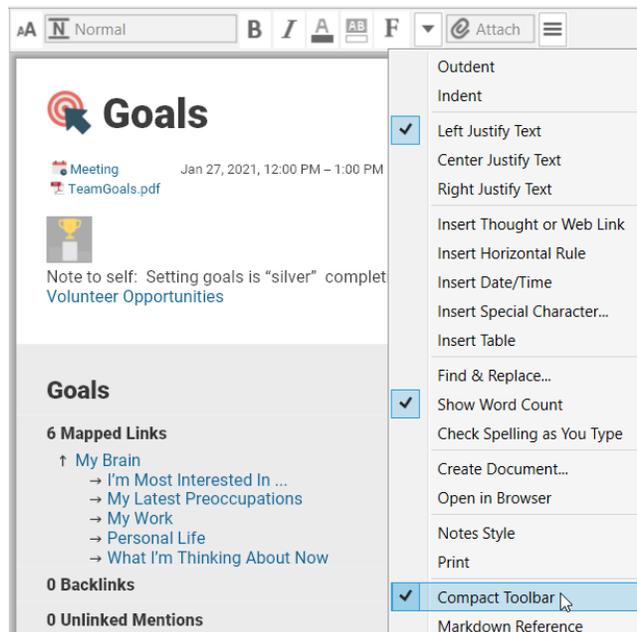


Figure 26. Expanding the Compact Toolbar from the Toolbar More Command

- Under Windows you'll notice improved scrolling when you're using the mouse wheel or touchpad.

Additional Notes enhancements are described in the sections below.

## Content Only Mode

You can access most features and functionality right from within the Content Area. This means that the Plex can be hidden while you concentrate on writing and other tasks that are easier in a larger work space.

## Previewing Notes in the Plex

With the optional **Show notes indicators** preference enabled in the Plex, small icons appear on Thoughts containing Notes. Now, you can hover over these icons to get an instant view of the corresponding Note.

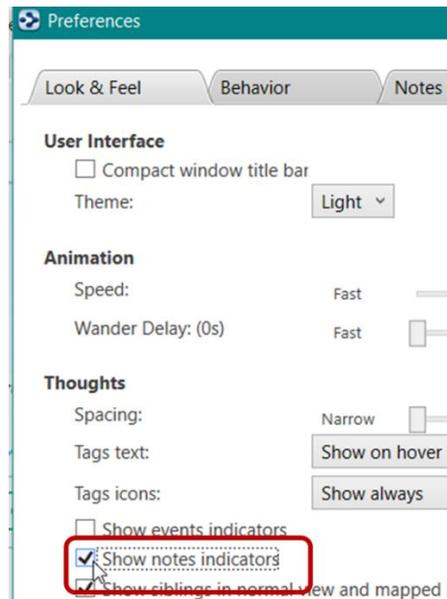


Figure 27. “Show notes indicators” is Enabled

Content previews also appear, by default, based on Search box results. This setting is on the **Behaviors** tab in **Preferences**.

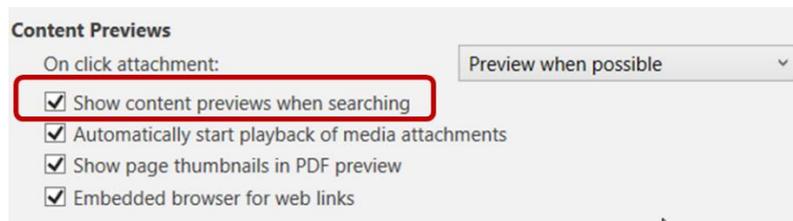


Figure 28. “Show content previews when searching” is Enabled

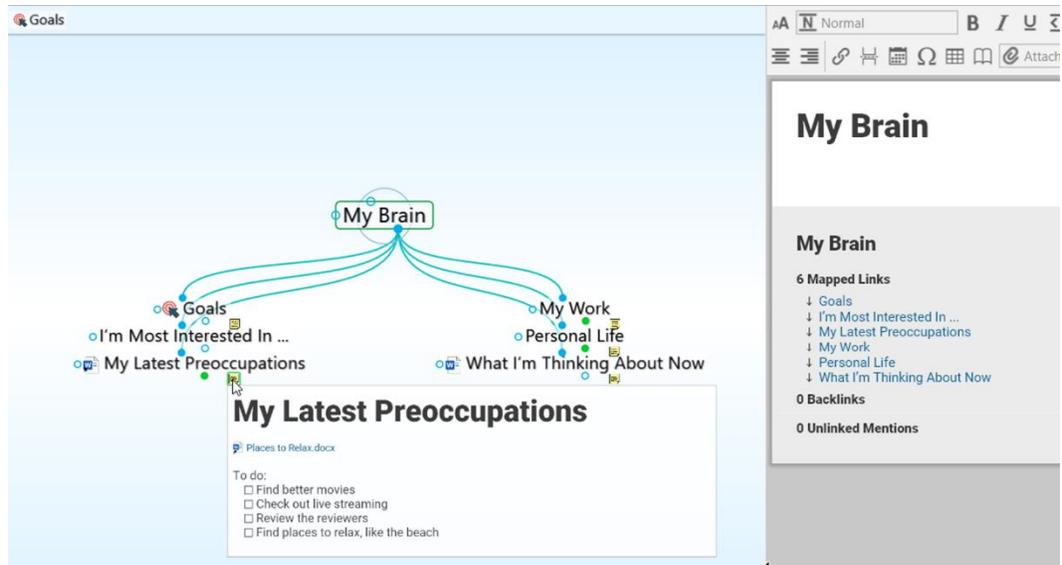


Figure 29. Content is Shown on Hover Over Notes Icon

## More Stylish Notes Styles

Your headings can be more expressive—you have access to ALL CAPS, variable letter spacing, and **alternative colors**. You also have more control over sizing.

- New commands to copy, paste, import, and export styles make it easier to create new styles.
- A variety of new built-in styles are also included. Prebuilt styles are grouped into **Light**, **Dark**, and **Fun** sections.

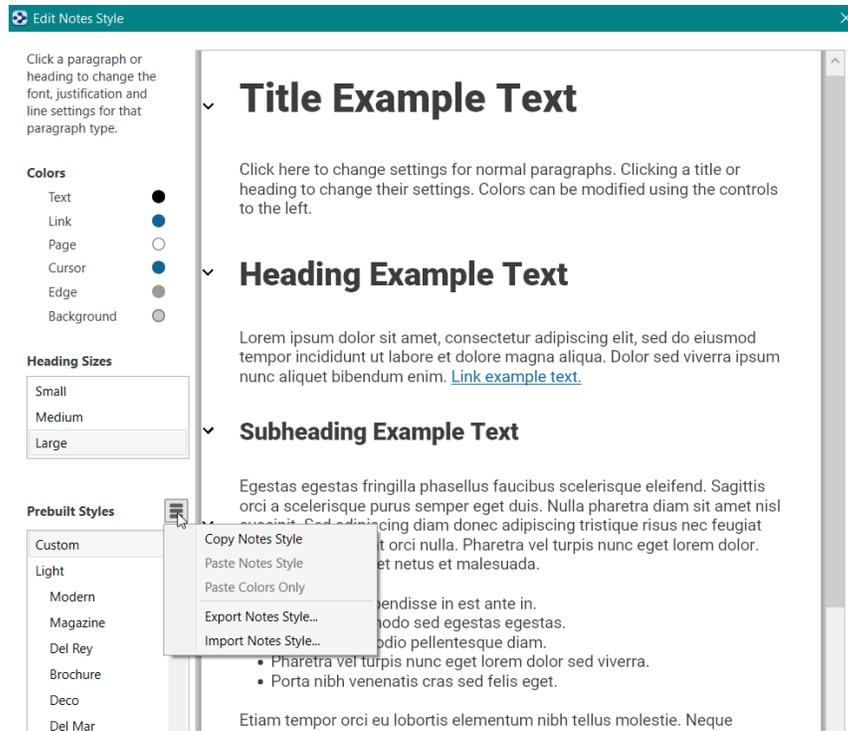


Figure 30. TheBrain 12 Edit Notes Style Window

**To modify styles:**

1. Click the **More** button, then click the **Notes Style** command (or if the Notes toolbar is expanded, just click the **Notes Style** icon).

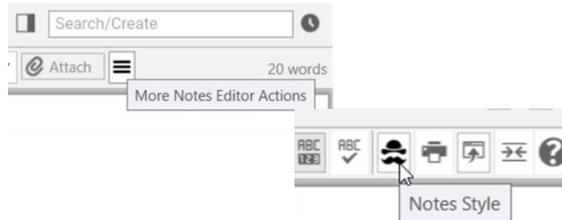


Figure 31. Opening the Edit Notes Style Window

2. Right-click within the sample text of the item you want to change, for example, “Heading Example Text.”

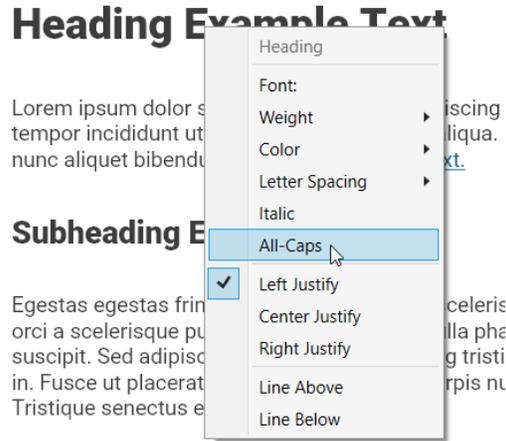


Figure 32. Choice for Formatting Styles

3. Click the **Apply** button or press the **Enter** key to save your change and close the window. Your change will be made in all Notes that have those headings.

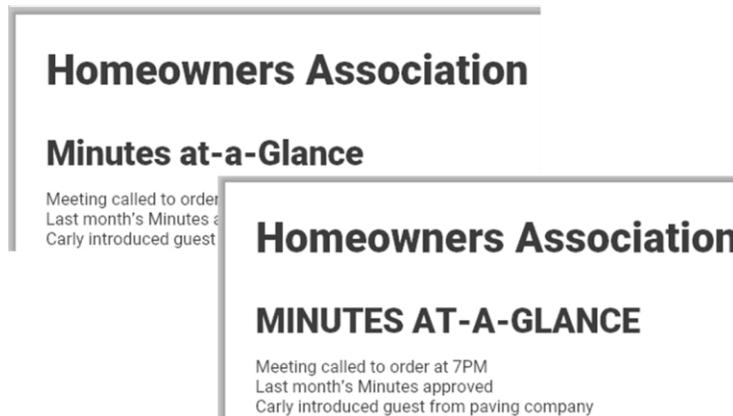


Figure 33. Before and After Changing the Heading Style to “All Caps”

## Keyboard Shortcut for Links, Attachments, and Check Boxes in Notes

When your fingers are already on the keyboard, there’s a new keyboard shortcut in town that can save you a mouse click: **Ctrl/Cmd+L**

1. Make sure the text cursor is already blinking someplace within the Note, then use the standard navigating keys to move the insertion point to any of these items:
  - An item in a check box list
  - A link

- An attachment
2. Press **Ctrl/Cmd+L** to toggle a check box on or off, follow a link, or open an attachment.

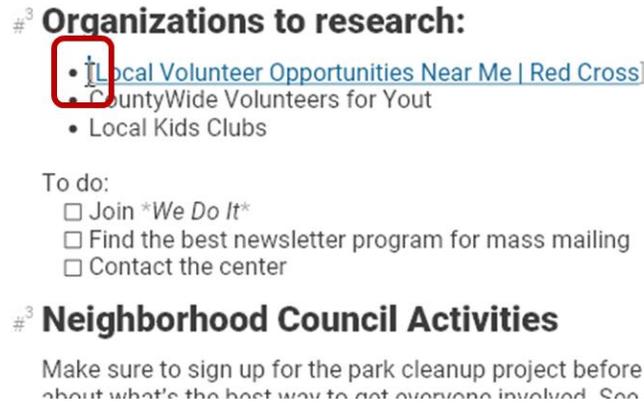


Figure 34. Pressing Ctrl/Cmd+L Will Open the Link

## Tab Key Functionality in the Notes Editor

When you're typing in the Notes editor, the **Tab** key performs different functions based on:

- Where the cursor is
- Whether text is selected



As in most text processing software, holding the **Shift** key while pressing the **Tab** key reverses the direction of the action. For example, wherever pressing **Tab** shifts text to the right, pressing **Shift+Tab** shifts text to the left.

### If no text is selected and the cursor is within or at the start of a paragraph:

- The **first line** of the paragraph (whether it is one line or many) is indented approximately five spaces each time the **Tab** key is pressed.

### When the cursor is in a list item (bullets/check boxes/numbered lines):

- The entire list entry is indented approximately five spaces each time the **Tab** key is pressed.

### When the cursor is in a title, subtitle, heading, or subheading:

- The level of the heading is decreased each time the **Tab** key is pressed. The heading level is increased each time **Shift+Tab** is pressed. For example, to change a Heading 4 to a Heading 3, you would click in the text and press **Shift+Tab**. (Heading 3 is a "higher level" than Heading 4.)

**When the cursor is in a table:**

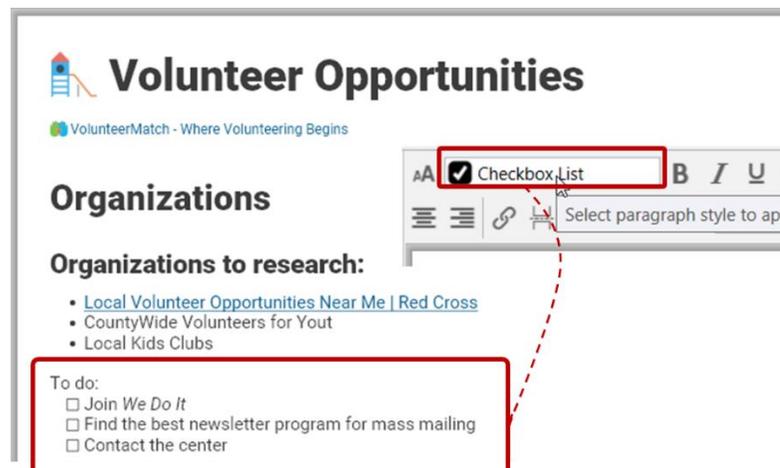
- Pressing the **Tab** key moves the cursor to the next cell.



Tab characters can't be inserted into the middle of a line of text. If you want to align text into columns, it's most efficient to format using a table.

## New Dynamic To-Do Lists

Now your to-do lists can practically complete themselves! Just as in previous versions of TheBrain, you can create to-do lists within Notes by attaching text to the **Checkbox List** style.



**Figure 35. A Check List in a Note**

As before, when you complete an item, you can click the check box and it's virtually checked off your list.



**Figure 36. A Completed To-Do Item**

**Now you can see ALL of your to-do items in one place. To do so:**

- Click the **Right Panel** button in the upper-right area next to the Search box or click the **To Do List** command on the **View** menu.

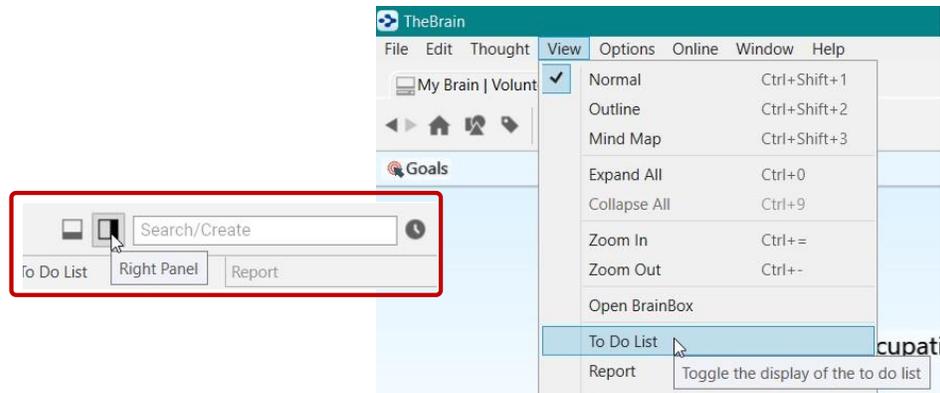


Figure 37. Two Ways to Open the To Do List for All Thoughts

The To Do List panel is displayed:

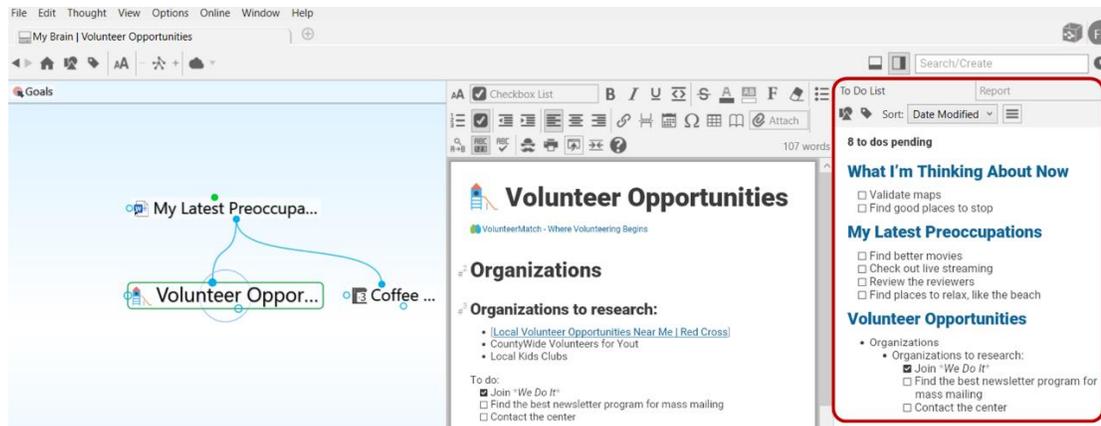


Figure 38. Two Ways to Open the To Do List for All Thoughts



When you click a check box in one location, such as the To Do List panel, it is automatically checked off in the other location (the Thought) and vice versa.

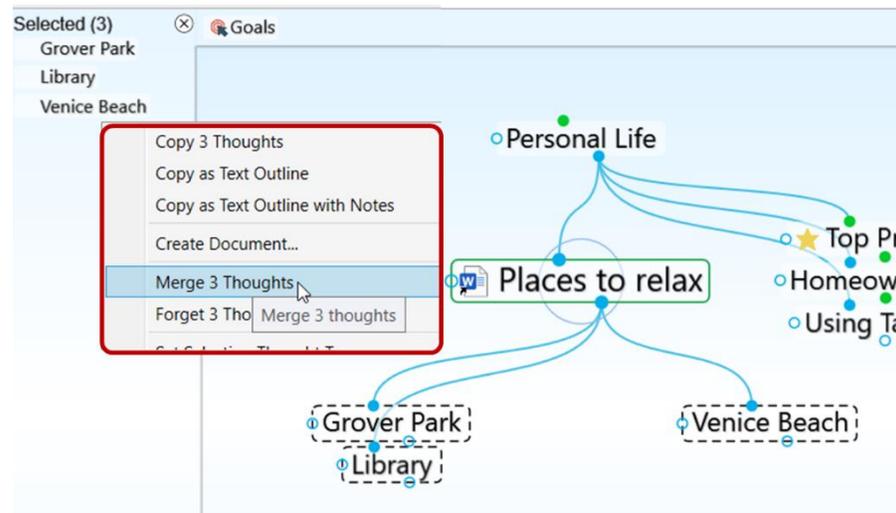
## Merging Thoughts

Now you can automatically merge multiple Thoughts that refer to the same thing. You can combine the links, attachments, and Notes so that the resulting Thought has all of the information from those multiple Thoughts.

**To merge Thoughts:**

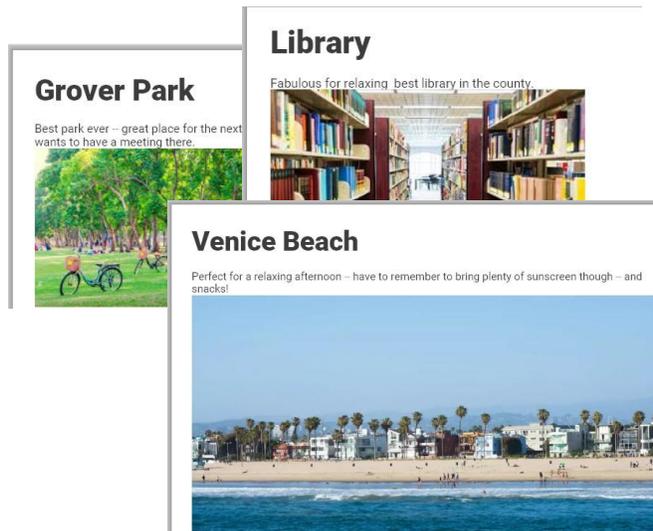
1. **Ctrl+click** on two or more Thoughts that you want to merge into a single Thought. The Thought names will automatically appear in the selection box.

- Right-click in the selection box, then click **Merge (n) Thoughts**.



**Figure 39. Merging Three Selected Thoughts into One**

When you activate the new Thought, you'll see all content that was in each of the standalone Thoughts. The name of the new Thought becomes a combination of the formerly separate Thoughts, in alphabetical order.



**Figure 40. Original Content Area of Three Thoughts Before Merging**

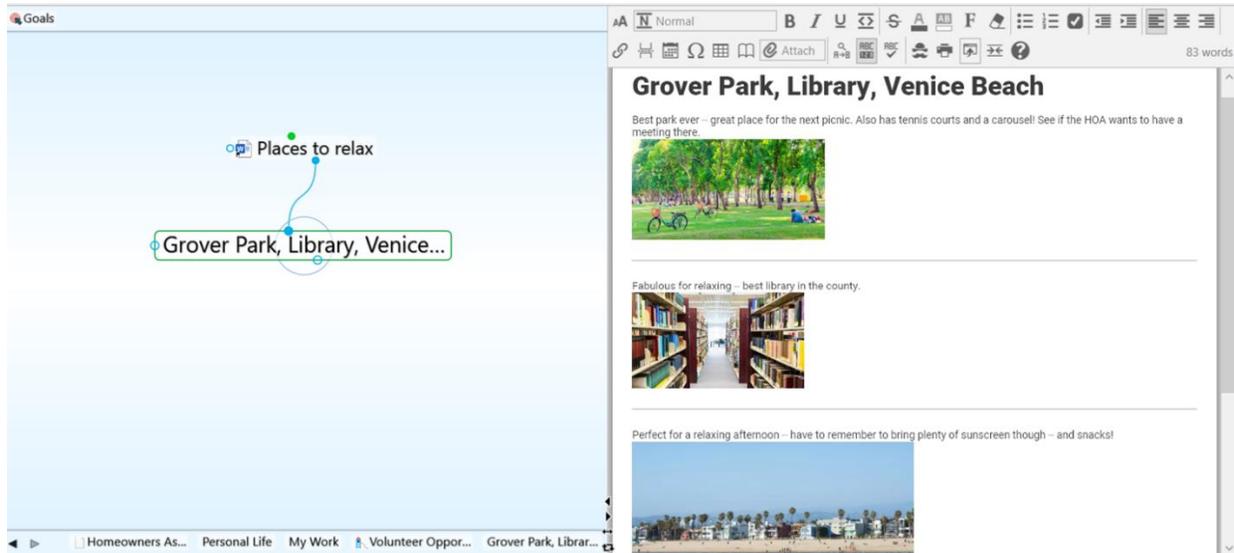


Figure 41. After Merging

## Encrypting Individual File Attachments

Now you can encrypt Individual file attachments within your Brain using the **Encrypt** command on an attachment's context menu.

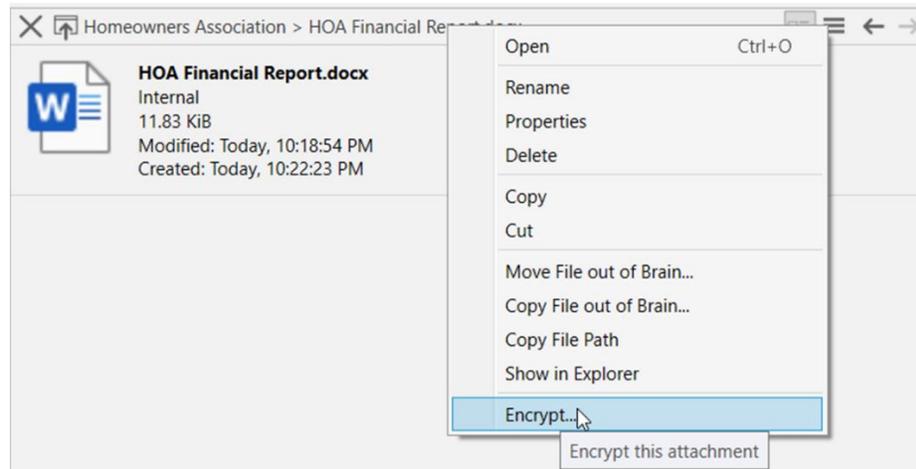
AES 256 bit encryption ensures that without the password, it is impossible to recover the file contents from the encrypted file—even with administrator access to the machine where the file is stored on a local computer or remote cloud server.

Encrypted files cannot be searched and can only be decrypted via Windows and macOS versions of TheBrain. These files are completely inaccessible even to your hosting provider whether that be a private TeamBrain Enterprise Server or TheBrain Technologies Cloud Server.

### To encrypt a file:

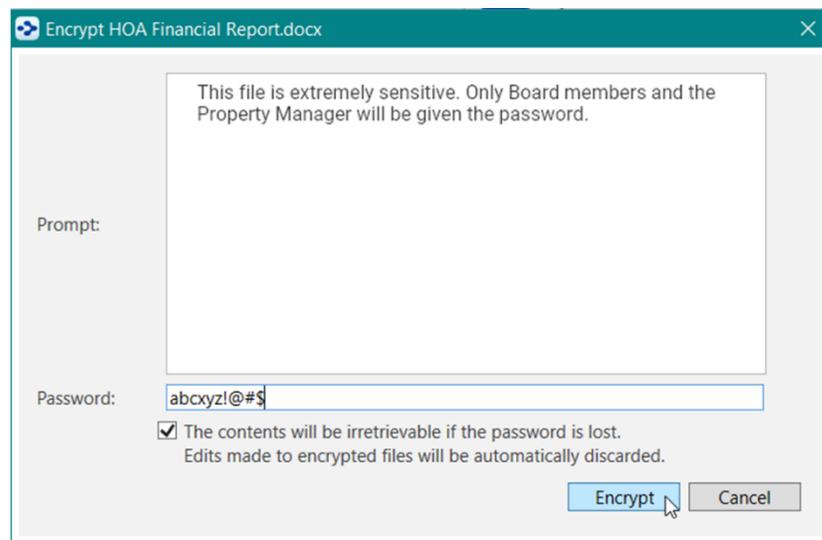
1. Right-click the attachment, then click **Encrypt** in the context menu.

## Encrypting Individual File Attachments



**Figure 42. After Clicking on the Attachment's Context Menu**

2. Type in the prompt you want the user to see when they attempt to open the file, type a password, click the check box confirming that the file cannot be opened if the password is lost, then click the **Encrypt** button.



**Figure 43. Example Encryption Details**

3. Whenever someone attempts to open the file, they'll see the prompt you entered. They will have to enter the correct password, then click the **Decrypt** button. After that the file can be opened by clicking on it.

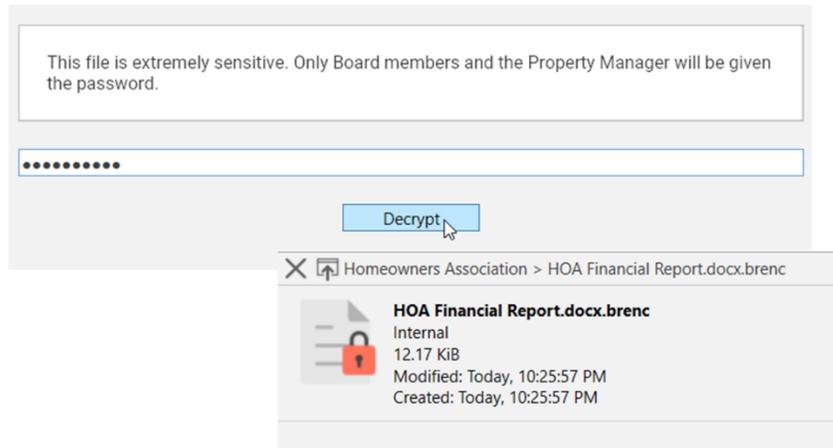


Figure 44. Decrypting and Opening the File

## More Improvements Throughout

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You'll find many other enhancements throughout TheBrain 12. Here are some of the highlights:

- You can find and execute commands from the Search box. To begin, type a forward slash (/) in the Search box. An alphabetical list will appear. The list will be fine-tuned to match what you type.

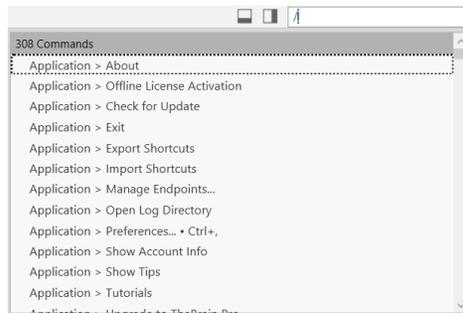


Figure 45. Executing a Command from the Search Box

- The Wander algorithm has been improved so that you'll be less likely to revisit the same thoughts.
- The initial startup time has been improved along with other performance optimizations.
- There's better rendering of forgotten Thoughts in the Plex.
- Event colors now inherit from associated Thoughts.

## More Improvements Throughout

- Events now support spellcheck and markdown formatting in descriptions.
- You can create a Thought and attach a URL in one step by entering a URL in either the Thought creation or Search box.
- There are many additional **Preference** settings available to suit your personal workflow.
- Intelligence has been enhanced to recognize plural and singular forms of the same word. This helps find context-sensitive matches in irregular cases such as *phenomenon* and *phenomena*.
- Now you'll see clear Search feedback when searches are fully completed.