

Transitioning to TheBrain Version 9

August, 2018

© 2018. TheBrain Technologies LP. All Rights Reserved.

TheBrain, PersonalBrain, Brain, Thoughts, and Work the Way You Think are trademarks or registered trademarks of TheBrain Technologies LP. Other trademarks or service marks appearing herein are the property of their respective owners.

Table of Contents

Introduction	. 2
About this Guide	. 3
Redesigned Intuitive User Interface	. 3
Tabbed Interface Brain Management Improved Plex Resizing the Plex Thought Properties Smart Splitter Drag to Select Thoughts Hidden Ordering System	. 3 . 4 . 6 . 6 . 8 . 9 11 12
TheBrain Content Area	12
Advanced Notes Attachments Embedded Web Browser Document Preview Opening Attachments	12 17 19 20 21
Time Management	22
Timeline View Event Reminders Google Calendar Sync	22 24 25
Syncing to TheBrain Cloud	27
Mobile Version Updates	30
Mind Map View	32
Search	33
Reports	34
By Types/Tags Duplicate Thought Names Forgotten Thoughts Modification Date/Time Orphan Thoughts Parentless Thoughts	35 36 37 38 39 39
Tag Icons and Abbreviations	40

Introduction

TheBrain 9 is our biggest release ever. It has been re-engineered from the ground up and provides enhanced capabilities in all aspects of the software. From the front-end user interface to the back-end data storage, literally everything is new and improved.

TheBrain 9 new features include:

\odot	Redesigned Intuitive UI
\odot	Faster and More Scalable Technology
\odot	Files Open in their Native Platforms
\odot	Brain Tabs
\odot	Effortless Beautiful Notes
\odot	Faster Search
\odot	More Powerful Sync
\odot	Integrated Content Previews
\odot	Timeline View
\odot	And many other enhancements



For an overview of these features watch the video at What's New in TheBrain 9

https://www.thebrain.com/products/thebrain/thebrain9

About this Guide

This guide covers the new features and changes in TheBrain 9 that have been made since version 8. It is intended for people who are already familiar with version 8.

Redesigned Intuitive User Interface

Content-focused design gets out of the way so you can focus on your stuff. From creating thoughts to adding attachments, everything is easier and more intuitive in TheBrain 9. Additionally, you'll notice a faster and more scalable interface. TheBrain 9 features powerful database tech that's much faster and more reliable. TheBrain 9 has quick startup, more responsive Brains and augmented scalability. Here are several of the key interface differences you'll notice:

Tabbed Interface

Now you can open multiple Brains at once to see and do more faster. The all new tabbed interface lets you switch instantly between Brains or even keep the same Brain open in multiple tabs or windows.

To utilize the tabbed interface:

1. When you log into TheBrain 9, all local, synced or online Brains will be displayed as thumbnails in the Brains tab, as shown below.

S TheBrain	- 0	×
Contracting My Brain		8
0 + C [↓] 2 []]	Fiter Brains List	
Marketing	My Brain	
00 =	(r)	
Product	Research	

Figure 1. TheBrain's Tabbed Interface

- 2. Click on a Brain to open it.
- 3. The current tab will now display the Brain you selected.
- 4. Click on the + sign to the right of the tabs to re-open the thumbnails for all of your Brains in a new tab.



Figure 2. Click the + Tab to Re-open your Brain Thumbnails

Brain Management

Use any of the following new features to better manage your Brain:

• Open different Brains in separate tabs. With TheBrain 9, switching between your open Brains is instantaneous. There is no limit to the number of Brains you can open at once.

- Float tabs into their own dedicated window by dragging a tab out of TheBrain application window. This will create a new Brain application window with just a single tab.
- Merge tabs into one window with a simple drag and drop. Click the tab of one Brain window and drag the tab to another open Brain, hovering over the tab area, and then release the mouse button.
- Open the same Brain in multiple tabs to view and edit multiple areas at a time. You can now view different areas of your Brain at the same time, even utilizing different layouts in each tab. Changes made in one tab are automatically rendered to other tabs viewing that Brain.

The uses of this feature are many. You'll wonder how you did without it. For example, you can even use it to keep your favorite Thought open all the time on a separate screen.

And remember, all your tabs and their positions within your Brain are automatically saved and restored when you quit and restart.

Also notice that each Brain in the Brains list will have an icon appearing in the lower right-hand corner of the thumbnail.



Figure 3. Icon Indicator Location

This will help you identify whether the Brain is Local, Synced (local and online) or Online only.



Figure 4. Indicator Icons

Improved Plex

The Plex is the heart and soul of TheBrain and it is slicker and more powerful than ever before.

- Silky smooth 60 frames per second animation (more than double the frame rate of TheBrain 8)
- "Easing" animations provide a more natural motion to all objects, allowing your eye to track changes better
- Smart highlighting and fading
 - TheBrain 9 uses fading and highlighting much more extensively so you can intuitively know what is happening more easily
- Unneeded gates around Thought Types and Tags have been removed
- Enhanced pins and past Thought list display makes them easier to read and clearly demarcated
- Fewer "save" buttons—just make a change and press the enter key

Resizing the Plex

Adjusting the visual display of your Brain to fit your resolution and screen environment has never been easier.

Change the size of Thoughts in your Plex with any of these convenient methods:

- The new, simple toolbar slider:
 - Click the AA button to activate the slider, then click and slide the bar to adjust the size of your Thoughts accordingly.



Figure 5. Resizing with the Slider

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



Figure 6. Resizing with the Mouse or Trackpad

 Hold Cmd (Mac)/Ctrl (PC) on your keyboard and press - for smaller or + for larger.



Figure 7. Resizing with the Keyboard

• Pinch to zoom on a Mac Trackpad.



Figure 8. Resizing on a Trackpad

Thought Properties

The new Thought Properties dialog box gives you fast access to the name, label, colors, icon, type and tags and disappears when you're not using it.



Figure 9. Thought Properties Dialog Box

To open a Thought Properties dialog box:

• Left-click on the active Thought.

Or

 For quick access to the Thought Properties dialog box of Thoughts that are not the active Thought, hold down Alt/Option on your keyboard + leftclick on any Thought; you can also Alt/Option + left-click on a Link to easily access its properties.

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

The Thought Properties dialog box features include:

- Renaming a Thought
- Adding or editing a Thought Label

- Adding or changing a Thought Type
- Clicking the pencil icon next to the Thought Type button to activate the current type and modify its appearance
- Adding or changing a Thought Tag
- Marking the Thought as Private or Public
- Customizing the Thought text or background color
- Modifying the Thought's icon
- Reviewing the Thought's modification history
- Forgetting the Thought
- Creating a Pin for the Thought
- Setting the Thought as the Home Thought

The small triangle icon in the lower right-hand corner of the Thought Properties dialog box will allow you to view the Thought's properties (modified date, creatioin date, and Thought ID as well.

		0 million
	Market Trends	
+	Label	Indus
	🔳 🛛 Market Trend	Tags
Modified:	May 20, 2013, 4:36:22 PM	
Created:	May 20, 2013, 4:36:22 PM	
ID:	9ea74426-6729-5009-88cc-834cac69dad5	

Figure 10. Expanded Thought Properties

Smart Splitter

TheBrain 9's new smart-splitter lets you control how your Brain is displayed and the orientation of the Plex and/or content panes. Eliminate time spent fiddling with the tools windows to try and optimize your workspace.

• Click on the double arrows [¹] to switch to an "over/under" layout of the Plex and content.



Figure 11. Smart Splitter

- Click the arrows again, to toggle back to the "side-by-side" view.
- Click the individual up- and down–arrows (or left- and right-arrows in a "side-by-side" view) to maximize either the Plex or the content pane.



Figure 12. Smart Splitter Maximizing the Plex

• Click the arrow in the opposite direction to toggle back to display the Content Area and the Plex.

The double headed arrow (or double clicking on the splitter bar) can also be clicked to switch the positions of the Content Area and the Plex.



Figure 13. Switch the Plex and the Content Area

Drag to Select Thoughts

TheBrain 9 contains new and improved multi-Thought actions.

• Select individual Thoughts or groups of Thoughts by holding down Ctrl (for Windows users) or Cmd (for Mac users) and dragging to form a border around the Thoughts.



Figure 14. CTRL/CMD + Drag to Select

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

Hidden Ordering System

Add a period and a number to order your Thoughts. 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, rather than alphabetically, however the numbers will not be visible in the plex. The numbers can always be modified in the Thought Properties dialog box.

TheBrain Content Area

The former "Tools window" has been transformed into the new, robust and intuitive Content Area. Here, the updates continue. You'll find improved notes, content previews and an embedded browser.

Advanced Notes

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

TheBrain Content Area



Figure 15. Redesigned Brain Notes

Notes have been redesigned and reimagined to allow for quick, robust, beautiful and easy note taking. TheBrain Notes also includes many new and exciting features in its sleek toolbar that only appears when you need it, while editing a Note.

The advanced Note taking capabilities in TheBrain 9 feature:

• Easy Web Links

Weblinks can be easily added, edited and identified right in the content of your Thought notes.

Web links can be inserted into notes by:

- Typing out the URL
- Pasting it from the clipboard

• Dragging it in from a browser

The web link will be identified and processed automatically.



Figure 16. Web Links in Notes

Automatic title retrieval replaces the URL with the title of the page it links to. The title can be easily edited to fit your content.

The visual indicator link icon button is automatically added to the end of the URL's title. Click it to go directly to the source.

• Instant Video Embedding

Videos from YouTube and Vimeo are embedded into Notes in a playable form automatically. Just drag and drop from your browser, right into your Notes. You can also copy the URL and paste into your Notes. TheBrain will take care of the rest.

• Note Resizing

Adjusting the visual display of your Notes in a Brain to fit your resolution and current screen real estate has been greatly simplified.

Fluidly resize your Notes to a view that is most comfortable for you using the all-new Text Size slider.



Figure 17. Text Size Slider

Click the AA button to activate the Text Size slider, then slide the bar to make the text larger or smaller.

Notes Toolbar

The Notes toolbar will only appear when needed for better use of screen real estate. As soon as you click in the Notes tab, the toolbar will appear.



Figure 18. Expanded Notes Toolbar

Depending on the amount of screen real estate available, the Notes Toolbar may be compacted with some buttons moved into menus.



Figure 19. Compact Toolbar for Notes

You can choose whether to show the compact or expanded Notes toolbar in the UI tab of TheBrain Preferences window.

The following features are all available for editing/formatting your Notes:

- Text Size Slider—for adjusting your font size in Notes.
- Paragraph Styles—Title, Heading, Sub-heading, Normal, and Code
- Common Text Formatting Options—Bold, Italic, Underline, Strikethrough, Superscript, and Subscript)
- o Foreground Color
- o Background Color
- Remove Inline Formatting
- Unordered List
- o Ordered List
- Checkbox List
- o Outdent
- o Indent
- o Horizontal Rule
- o Insert Date/Time
- o Insert Special Character
- Insert Hyperlink
- o Insert Link to Thought
- o Find and Replace
- Show Word Count (which appears to the right of the Notes toolbar)
- Check Spelling as you Type
- Notes Style
- Open in Browser
- o Print

• Style-Based Formatting

You can choose the style of your notes by clicking on the Notes Style icon in your Notes toolbar.



Figure 20. Setting the Notes Style

The Notes style is defined Brain-wide, meaning that the style you choose affects the look of all Notes in a single Brain, so choose a Notes Style that matches the look of each of your Brains! These new built-in styles provide carefully-designed looks in several different themes:

- o Modern Clean, Thin, San Serif Font
- Classic Fonts with Serifs
- Codex Soft tones, easy on the eyes
- **Console** Black background, green text ... IBM 3270
- o Dark Clean, light font on a dark background
- o Deco Bold text
- o Del Rey Our favorite and TheBrain's default style
- o Draft Inspired by a Daisy-wheel typewriter
- Custom... Create your own!

Note Styles also follow a "responsive web design guidelines" approach so any Note you create will look great whether it is viewed on a 30" monitor or a 4" mobile device.

Attachments

Each Thought in your Brain can have content associated with it. This includes Notes, Web Pages, and a multitude of files attachments. While TheBrain 9 still supports drag and drop of file attachments, or creating documents from scratch,

there are several new enhancements that make attachments in your Brain even more accessible.

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. This, however, can be easily adjusted to suit your unique environment.

In your Brain Preferences, click on the UI tab. The drop-down options next to "On drag and drop of files" let you choose from any of these three options:

- Move dropped files
- Copy dropped files
- Link dropped files

Preferences	×
Look & Feel UI	System Keyboard
Thoughts	
On click active Thought:	Open Properties 👻
 Automatically capitalize Thoughts of Activate last created Thought Download Icons for Attached Email 	on creation I Addresses from Gravatar
Content	
On drag and drop of files:	Move dropped files Y
Content tab location:	Move dropped files
Update displayed content on hove Show details when selecting attach	Copy dropped files
 Embedded browser for web links 	
Show attachments as a list	

Figure 21. Setting TheBrain's Drag and Drop Behavior

Additionally, you can use keyboard shortcuts to override the default drag and drop settings:

macOS modifiers:

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

Windows modifiers

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

Embedded Web Browser

Web attachments now appear right inside TheBrain 9's content area, letting you access web information without having to open it in a separate browser. You can even continue on navigating from within TheBrain 9's built-in browser.

Adding URL attachments to your Brain is still a simple process.

The easiest method for linking a web page into your Brain is to simply drag and drop it right 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 that web page as an attachment:

- Drag and drop to the Plex area to create a new Thought. The Thought name will be the title of the web page.
- Drag and drop onto an existing Thought. 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 22. TheBrain's Built-In Web Browser

Document Preview

The Document Preview option allows you to preview some file attachment types right in the Content Area of TheBrain without having to launch the file's default application.

Windows Instructions:

• Some file attachment types in your Brain will have a Preview button in the Content Area.



Figure 23. Content Preview Button

• Click on the Preview button to launch the Document Preview for this attachment.



Figure 24. Content Preview

macOS Instructions:

Click on TheBrain > Preferences. On the UI tab, check the box for Preview File for Attachments. Attached files will then automatically display in the Content Area.

Opening Attachments

Additionally, you can still open any attachment in its native application by selecting its tab in the content area and clicking the open button—or by simply double-clicking on the tab.



Figure 25. Opening an Attachment in it's Native Application

Time Management

Keeping track of your Thoughts, files and web content is just the start. 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.

Timeline View

TheBrain 9 allows you to visualize Time and Events in the Timeline View. These events can be easily associated with specific Thoughts in your Brain.

Toggle the Timeline display on and off by clicking the Timeline command on the View menu, or the Timeline button, to the left of the Report button that's next to the Search box.



Figure 26. Launching TheBrain Timeline

A new event for a Thought can be created by clicking the Add Attachment tab and selecting Create Event. Events created from the Add Attachment tab will automatically be associated with the current active Thought.

Link to File		Enter URL
Open Folder		Create Event
Capture Image	Templates	Paste
Microsoft Access Database		
Microsoft Excel Worksheet		
Microsoft PowerPoint Present	ation	
Microsoft Publisher Documen	t	
Microsoft Word Document		

Figure 27. Creating a New Event

From the event editor dialog, you can specify the time, add a label, description or location for this event. Make the event recurring and even 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.

Marketin	g		
6/5/2018	10:00 AM	to 6/5/2018	11:00 AM
All Day	ReminderUR		
Repeat Ne	ever Create Eve		
Marketing Bu	dget Review	Pacte	
Description			
Location			

Figure 28. Modifying a Brain Event

Additionally, you can create a new event by dragging on the time ruler at the bottom. This is a stand alone event that is not automatically associated with the current active Thought. But all events can be attached or detached from any Thought in TheBrain from the event properties context menu.

Jun 4, 2018 01:00 PM 05:00 PM 4	hours
	No Thought or Link
Monday, June 4, 2018	6/4/2018 1:00 PM to 6/4/2018 5:00 PM
	All Day Reminder
	Label
	Description .
	Location

Figure 29. Click and Drag to Create a New Event

Navigation in the Timeline View is simple.

• Drag up and down to zoom in and out.

<u>total and the second </u>	s 1 27 2 3 4 10 1 17 1 24 2 1 2	June 2 M T W 28 29 30 4 5 6 11 12 13 18 19 20 25 26 27 2 3 4	2018 T F 31 1 7 8 3 14 15 0 21 22 7 28 29 5 6	s 2 9 16 23 30 7
9 am 10 am 11 am 12 pm 11 pm 2 pm 3 pm 4 pm 15 pm 16 pm 17 pm √ ← → • =				

Figure 30. 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 31. TheBrain Timeline Buttons

Event Reminders

TheBrain can provide pop-up reminders for specific events.

To have TheBrain remind you of an existing event, check the Reminder box in your event's Properties window.

Marketi	ng		
6/5/2018	10:00 AM	to 6/5/2018	11:00 AM
All Day	Reminder	10 minutes	
Repeat N	lever	∕ â tr	
Marketing B	udget Review		
Description			
Location			

Figure 32. Setting an Event Reminder

Specify how long prior to the event you would like to receive your reminder.

Reminders in TheBrain 9 will only appear when the Brain containing the event is open.

My Brain Reminders		
Jun 1, 2018, 11:00 AM – 12:00 PM	Public Relations - Meeting with Tammy	^z _{zz} ×
Jun 1, 2018, 10:00 AM – 11:00 AM	Marketing - Marketing Budget Review	^z _{z_z} X
	Snooze amount: 5 minutes 💙	Snooze All

Figure 33. 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.

Google Calendar Sync

If you're synchronizing your Brain to TheBrain Cloud with a Pro Combo or Pro Service 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:

- Open TheBrain Timeline and click on the Actions and Settings button to open your Google Calendar Settings.
- By default, your Google Calendar Settings is set to None. Click on Add Google Account. This will open https://accounts.google.com where you can select your desired Google account that will be associated with this Brain. You can only link one Google account to your Brain.

Manage External Accounts X
2
Connected accounts:
Add Google account Remove account

Figure 34. Setting Up the Google Calendar Sync

• Google will display a confirmation window when you have selected an email address. Click the Allow button.



Figure 35. Confirming Access to Google Account

- Back in TheBrain, the new Gmail address will appear on your Google Calendar Settings window. Select it and click the OK button to confirm that all events from the Google Calendar will be added to this Brain and vice-versa. Additionally, the changes made to either calendar cannot be undone.
- Syncing to TheBrain Cloud will also include syncing your Brain Timeline and your Google Calendar.

Syncing to TheBrain Cloud

TheBrain 9 now features a more powerful sync to https://app.thebrain.com. To sync your desktop Brain to TheBrain Cloud for online access or for keeping the same Brain in sync on multiple devices, click the Cloud icon in TheBrain's toolbar.



Figure 36. The Sync Button

Once your Brain has been synced, it will be automatically set to auto-sync. This feature can be turned off if desired by clicking on the Sync Status button next to the Cloud icon in the toolbar.



Figure 37. 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.

This Brain will now be available to download for local use on other devices where you install TheBrain. The Brain will show up in your Brain list with a cloud icon once you log in. Clicking on the Brain's thumbnail in your Brain list will download a local copy of the online Brain.



Figure 38. Brain Location Indicators

All Brains synced to https://app.thebrain.com are private and not accessible to other users. To share a v9 Brain with other users:

- Open the desired Brain in your local desktop application
- Click on Online from TheBrain menu and select Brain Access and Sharing...
- You have several different options for sharing your Brain
 - Option 1: Check the option for Allow Public Access 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.
 - Option 2: Leave the 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.
 - **Option 3:** Upgrade to TeamBrain. TeamBrain allows multiple users to collaborate in the same Brain database. Learn more at https://www.thebrain.com/products/teambrain.

逐 My Brain B	rain Access X		
Web Link:	https://bra.in/4qeWgv Copy		
	Allow public access		
	This Brain will be inaccessible except to authenticated users.		
User Access:	Access Level Group/User		
	Administrator Me		
Users in this list will have access to this Brain including private theughte. This Brain will appear in their Brains list and will be			
	syncable to their local storage.		
	Add user via email Invite		
	Save Cancel		

Figure 39. Brain Access and Public Web Link

Mobile Version Updates

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 for TheBrain 9 are vastly improved, including the ability to download 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 40. Syncing TheBrain on iOS

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

Mind Map View

In addition to the Normal and Outline views, the all-new Mind Map view combines TheBrain's dynamic reconfiguration with a horizontally expanding symmetrical layout.



Figure 41. 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.

- 1. To access Mind Map view, click on the Layout button in the Brain's toolbar or click on View > Mind Map.
- 2. View additional generations of Thoughts in your Brain in several ways:
 - Hover over a Thought and click on the + icon to expand it's child Thoughts or the - icon to collapse its child Thoughts from the current view
 - Click on the + or icons next to the layout button in the Brain's tool menu
 - Click on View > Expand All or View > Collapse All to adjust viewing additional generations of Thoughts
 - Right-click on the Plex and select Expand All or Collapse All

- Customizable keyboard short cuts can also be set to Expand or Collapse All
- 3. At any time, return to Normal view with either the Layout button or from the View menu in TheBrain menu bar.

Additionally, click on another Thought while in Mind Map view to switch the focused Thought without changing the layout. This is convenient for when you want to view and alter various pieces of content while keeping the view mostly static. To navigate to another Thought in your Plex while in Mind Map view, right-click and select Activate Thought.

Search

To perform a search in your Brain, simply start typing in the search box which is located in the upper right-hand corner of your screen. The word "Search" appears grayed out in the box when no search is taking place—making it easy to identify. There's no need to click on the search box, your cursor is there by default, unless you are actively typing in the Notes tab or another field.

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



Figure 42. 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.

Click on any search result to make that Thought the new Active Thought.

Just press the Enter key after performing a search to instantly activate the first search result.

Reports

Using Reports is an excellent way to manage large groups of Thoughts in your Brain. To open a Brain's Report area click on the Report command in the View menu.

View	,	
~	Normal	Ctrl+Shift+1
	Outline	Ctrl+Shift+2
	Mind Map	Ctrl+Shift+3
	Expand All	Ctrl+0
	Collapse All	Ctrl+9
	Zoom In	Ctrl+=
	Zoom Out	Ctrl+-
	Report	N
	Refresh Report	1/2

Figure 43. Viewing the Report Area

You can run reports based on the criteria discussed below.

By Types/Tags

The Types drop-down will allow you to filter Thoughts in your Report by checking specific Thought Types in the list. This will exclude all Thoughts that are not assigned the chosen Types.

Thoughts	By Types/Tags 🗘 Reset ×
Types:	Destination , Asset, Sales Agreement
Tags:	Asset Equipment Inventory
Sort:	Real Estate Technology
 Asia Paci Chicago 	 Destination
Great Bar	Document
Hawaii	Agenda
Mexico	Projection
San Fran	Report
Sidney	Contract
Tokyo	Employment Agreement
	 Lease Agreement Sales Agreement

Figure 44. Filtering a Report

The Tags drop-down gives you the ability to filter Thoughts based on your assigned 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 45. Filtering With/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.

Duplicate Thought Names

The Duplicate Thought Names selection allows you to quickly view and access multiple Thoughts with the same name.

	earch	۶	Q
Thoughts:	Duplicate Names 📉 Reset		
Search:	By Types/Tags		
Access:	Forgotten Parentless		Ý
Sort:	Orphan		
1050	Duplicate Names		1
1950	By Attachments		1
1960			
1960			
🔥 Active Projects			
Active Pr	oiects		

Figure 46. 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.

Forgotten Thoughts

The Forgotten Thoughts selection allows you to quickly view and access any Thoughts you have forgotten in a Brain.



Figure 47. Forgotten Thoughts Report

From the menu, you can choose 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 48. Adding Report Results to the Selection Box

Clicking on any of your Forgotten Thought results will automatically enable the option to Show All Forgotten Thoughts in your Brain, making it even easier to navigate through and manage your Forgotten Thoughts.

		Showing Forgotter	n Thoughts	View Report ×
Thoughts Forgot	tten	≎ Reset ×		
Time:	Any		Stalled Projects	
Sort: Name	O	Ξ	•	
New Cell Technology				
Project B Project G			Sail into the Future	
🚦 Sail into the Futu	re			



Modification Date/Time

The Report options By Types/Tags, Forgotten Thoughts, Parentless Thoughts, Orphan Thoughts can all be further narrowed down using the Time drop-down.

Thoughts	By Types/Tags 🗘 Reset ×		
Types:	Project		
Tags:	Any		
Time:	1/1/2016 - 5/11/2016		
Sort:	Modified between		
🔒 Green Lig 🍅 Hot Proje	Start: 1/ 1/2016, 8:12:12 AM 🗘		
Mew Clie New Hire	End: 5/11/2016, 3:12:12 PM 🗘		

Figure 50. Filtering Thoughts in Report by Modified Date

This is incredibly useful for finding information modified within a specific date/time range and allows for even more in-depth reporting.

Thoughts	By Types/Tags 🗘 Reset ×		
Types:	Document, Research, New Release		
Tags:	Any		
Time:	1/1/2016 - 5/12/2016		
Sort:	Name C E		
Product Version 3			
 Sales Research Upcoming Trip Research 			

Figure 51. Sorting Thoughts in Report by Name

Additionally, the Sort drop-down can be used on any Report option to switch the list order of your Report results between Name and Date, in descending order.

Orphan Thoughts

The Orphan Thoughts selection allows you to quickly view and access any Thoughts that do not have any other connections.



Figure 52. 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.

Parentless Thoughts

The Parentless Thoughts selection allows you to quickly view and access any Thoughts that do not have a Parent.

Thoughts	Parentless		Reset ×
Time:		Any	
Sort:	Name ᅌ	Ç	≡
© Company ₩ Brain ऄऀ My Team	/ Goals		

Figure 53. 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.

Note: 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.

Tag Icons and Abbreviations

TheBrain 9 allows you to replace the display of your Thought Tags with an abbreviation and/or an icon.



Figure 54. Tag Icons

This makes for a cleaner appearance in the Plex. Hovering over a Thought with Abbreviated Tags or Tag Icons will then display the full Tag name.



Figure 55. Display the Full Tag Name when Hovering

To create Thought Tag Abbreviations and/or Icons:

- 1. Create the new Thought Tag in an existing Thought or navigate to an existing Tag using Search or the Tags button in TheBrain toolbar.
- 2. Open the Tag Properties for this Tag.

da	Spicy	-
	НОТ	

Figure 56. Tag Properties

3. Enter your Abbreviation for this Tag or assign an Icon.

You can choose how Tag text and Tag icons will be visualized in the plex in the Brain Preferences. From the Look & Feel tab, the drop-down options next to "Tags text" and "Tags icons" let you choose from any of these three options:

- Do not show
- Show on hover
- Show always

Thoughts Spacing: Narro	ow			
Tags text	Show on hover 🐣			
Tags icons	Show always 🛛 🗡			
 Show notes and event 	ts indic Do not show			
Show siblings in norm	al view Show on hover			
✓ Context sensitive Thought na Show always				
Show label for active Thought				
 Text shadows 				

Figure 57. Tag Visualisation Settings