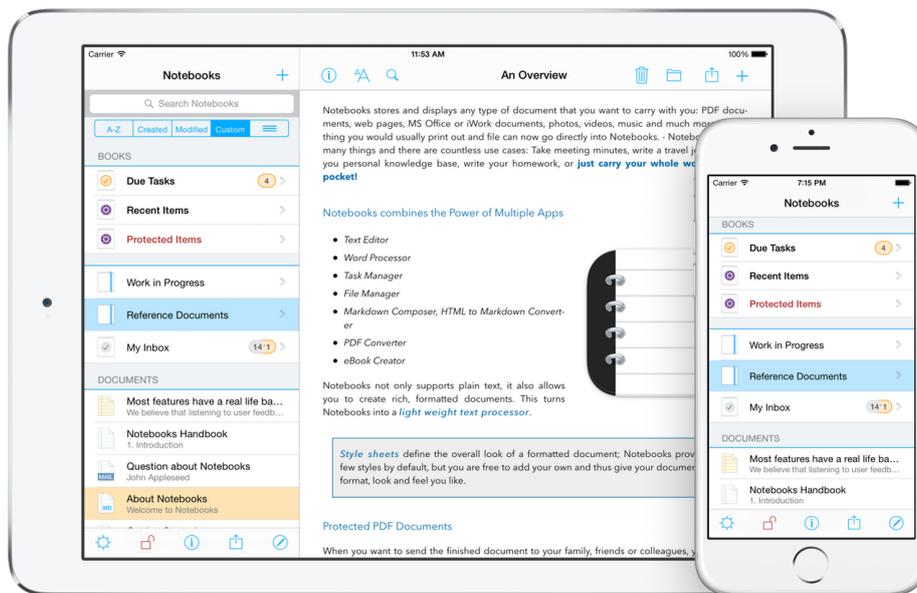# Notebooks

The _only_ notebook you need.

1. Introduction

You know the situation: you are desperately looking for some important piece of information and have to realize that it is nowhere to be found. It may be stored on your computer at home, or it may be written on a piece of paper you left at your office desk …

Or maybe you are already using an electronic note taker, but it presents your notes in one single list of entries, which makes it impossible to separate your private documents from business memos and your todos from your journal entries.

That's history with Notebooks, which is here to address these and many more shortcomings. *Notebooks* is designed to be the sole place to put your notes, ideas, memos, documents, task lists, reminders and everything else you want to keep close at hand, neatly structured and nested, in a stylish package – your iPhone or iPad. No matter whether you want to look something up or write something down, the proper notebook is always there with you.

If you prefer drawing to writing, Notebooks provides you with a canvas, a handful of pencils of different colors and allows you to get creative.

What about existing documents stored on your computer? Just take them, import them into Notebooks and you have them exactly where they need to be: at your arm's length, anytime. You can also synchronize the contents of Notebooks with your computer, a server on the internet, or another version of Notebooks running on a different device. Regardless of where you add or modify your documents, the next synchronization will update all locations seamlessly and effortlessly.

Task lists are an important part of many people's lives, and very easily a few ideas written down may turn into a list of todos or even spark off a project. It comes naturally that Notebooks integrates task management into its feature set and allows you to manage lists and tick off your to-do's as you complete them. If you want, Notebooks even reminds you of due dates and presents your due items in iOS notification center (iOS 8 or above).

You are not limited to plain text notes or formatted documents, of course. Notebooks stores and displays PDF, Pages, Numbers, Keynote, Word, Excel, Powerpoint, HTML, and RTF documents, as well as images or web archives. Simply take your current flight schedule, the PDF version of a presentation, the draft of your latest short story and the handbook of your new camera, put them into Notebooks and always have them readily available.

A full featured *PDF Reader*, seamlessly integrated into Notebooks, is available as in app purchase. The PDF Reader allows you to swipe through multi page PDFs (which gives a real nice impression of reading a book), set bookmarks, search the text, and of course annotate the document by highlighting phrases in various colors, underlining, but also by adding hand written notes or drawings to the PDF.

As you see, with Notebooks you carry your world in your pocket.

SCENARIOS

- Capture notes and ideas while on the go, for example preparing the draft for a business presentation, collecting ideas for your novel, writing a re-

view or typing an email you want to send later.

- Write down meeting minutes, convert them to todo lists and send them

  to the participants while on the way back to your office.
- Keep your task lists and get things done. Cross reference to your reference library, which you keep in Notebooks, too.
- Collect all important pieces and snippets of information and create your personal knowledge base.
- Write your diary or travel journal. If you are on a trip for several days, just put your flight schedule and some tourist information into Notebooks.
- Type your email and take advantage of landscape and full screen format.
- Work on your writing project while you are away from your computer.
- Save web pages to read them later.
- Import documents from Mobile Mail, Safari or other applications.
- List your inventory, your books, recipes or wine collection …
- There are unlimited examples of what you can do with Notebooks. Once you have started using Notebooks it will be hard to imagine life without it.

WHAT CAN YOU DO WITH NOTEBOOKS?

- Type plain text notes or create formatted documents, no matter how long they are.
- Use Markdown, a simple set of rules to apply to plain text, which is then automatically converted to beautifully formatted HTML, with text styles and embedded images.
- Use landscape and fullscreen modes, which maximize screen space and provide distraction free reading and writing.
- Freely assign fonts, colors and backdrops (paper types) to books and individual documents. Notebooks provides a convenient set of colors and paper types, but you are free to define and add your own.
- Notebooks can be your sketchbook and allows you to draw or write with

your fingers or an optional stylus.

- Import your text, HTML, RTF, PDF, MS Office, Apple iWork documents, pictures, websites, web archives, audio files and videos.

- Save and archive your emails (.eml).

- Import iPhone/iPad Notes and Palm Memos.

- Quickly create new documents from the contents of the Pasteboard (text, images, URLs, websites …).

- Grab web pages directly from Mobile Safari (you need the Notebooks Bookmarklet for that, it is available in the download area of our website).

- Import and extract zip archives.

- Create zip archives from selected books (Notebooks keeps a searchable index of all the zipped documents and allows you to search for the titles).

- Turn selected documents or whole hierarchies of books and documents into eBooks, or convert them to PDF.

- Manage your Task Lists and assign alarm times to tasks.

- Let Notebooks automatically extract tasks from your documents.

- Maintain your library or referencing documents, which supports task management.

- Define tags and assign them to books, tasks and document. This helps you find information by context.

- Store and organize documents in an unlimited hierarchy of nested books.

- Freely move, rename and restructure your books and documents.

- Sort documents by title, modification, creation date or your custom sort order.

- Find documents with full text search (plain text, HTML, iWork, Office, RTF and web archives).

- Protect confidential information with a passcode.

- Use Notebooks' custom links (URLs) to reference documents or books within Notebooks and across applications.

- Synchronize Notebooks with Dropbox and your computer in one swoop.

- Synchronize Notebooks with your favorite WebDAV server, including the one integrated in *Notebooks for Mac.*

- Access Notebooks from your computer like an external hard drive through its built-in WebDAV server.
- Import and share documents from other apps on the same device.
- Send notes and documents by Mail.
- Type faster and easier by integrating with TextExpander (if you have that installed).
- Send tasks to OmniFocus, Firetask, Ideawell, Appigo Todo (the applications need to be installed),
- … and Notebooks even counts characters and words for you.

> Although most screen shots in this handbook show Notebooks on the iPhone, the documentation is equally valid for Notebooks on the iPad. Whenever there are relevant differences, they will be pointed out.

2. Create Content

While Notebooks' name suggests that is only meant for taking notes, it actually allows you to write notes, compose formatted documents and store all kinds of documents for reference. So you can also see Notebooks as a document storage, personal database, reference library or which ever term seems apt.

Notebooks stores your documents in their original format, which makes it very easy to export them to or import them from your computer, exchange them between different devices or share them with others. We think this is essential, because Notebooks is *not* a closed box introducing its own document formats and forcing you to use them. It is quite the opposite: Notebooks supports universal, open formats, so you can be sure that when you put something into Notebooks, you can easily retrieve it again and reuse it in other contexts and tools.
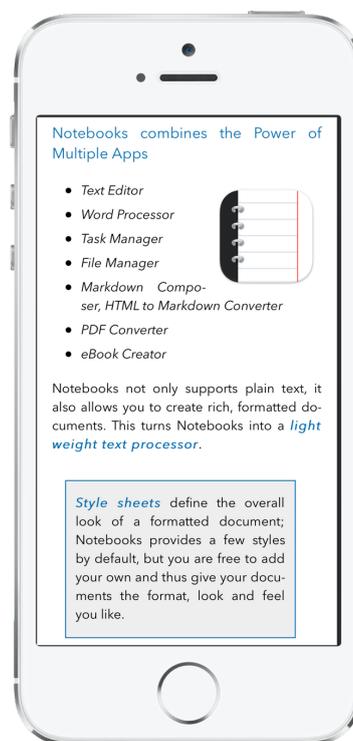
BASICS ABOUT DOCUMENTS

- Documents typically appear in the "Documents" section of a book's list.
- To open a document, tap its entry in the list.
- Swipe up and down along the text to scroll through the note. To quickly return to the top of a document, touch the iPad's or iPhone's status bar.

- To move to the next or previous document in the same book, swipe left or right across the document.

- Tap the text to bring up the keyboard and start writing.

- The first line of text in a document automatically becomes the document's title. When you change the first line later, the title of the document changes as well.
  If you want a title that is different from the first line, open the document's info and assign a new title. Notebooks then no longer automatically adjusts the title.

GESTURES

- Swipe left to right (or right to left) across the document to move to the next or previous document. An info bar briefly displays last modification date and sequence number in the current book.

- Swipe up and down to scroll through the document. Notebooks remembers where you left a document and scrolls to that position the next time you open it.

- Tap the document with two fingers to switch to full screen mode. Tap again to return to normal view. On the iPad, when you tap a PDF document with two fingers, Notebooks switches to a more comfortable PDF view with thumbnails.

- Tap and hold the document with two fingers to scroll to the bottom. To scroll to the top, just briefly tap the status bar (this is a standard iOS gesture).

- Tap the title of a document (the center of the navigation bar) to open the jump dialog, which allows you to quickly move to a different book.

- Tap and hold the *Back* button to jump back to Notebooks' top level.

FULLSCREEN MODE

In fullscreen mode, Notebooks hides a document's header and footer (navigation bar and toolbar) and on an iPad even the left column when working in landscape mode. This allows you to use the maximum screen space and write without distractions. To toggle between fullscreen and normal view, tap the document once with two fingers.

On an iPad in landscape mode, a fullscreen document covers the whole width of the screen. As this may be too wide for working comfortably, Notebooks provides an option to reduce the document's width and make it look more like a classic typewriter.

- Open Notebooks' settings, navigate to Write and Edit and turn on the switch Use Typewriter Layout.

THE NAVIGATION BAR

The "+" button at the top right corner of the screen lets you create new documents. Tap the button to display a menu and choose between a plain text a formatted or a Markdown document (Markdown is available only when activated in Notebooks' settings).
If you have a favorite document type and want to avoid the selection when creating a new document, you can set a default document type in Notebooks' settings. Tapping the button then immediately creates a new document of your default type.

The *Go to…* Menu

The document's title in the navigation bar acts as a button, even though it does not appear as one. Tap the button to get a list of all books and quickly go to a different book.
If enabled in settings, your Recent Items appear on the list as well and provide quick access to your recently used documents.

THE TOOLBAR

Most icons on the toolbar should look familiar if you have already used Mobile Mail or other apps pre installed on your iPhone or iPad.

- The Info button reveals the details about the current document. This view and its options is covered in detail in an extra section.
- The Magnifying Glass button allows you to search the contents of the current document. For some document types this button is disabled.
- The Delete button removes the current note. Please be careful, because deleting a document is final, there is no trash can.
- The Move button brings up a list of all available books and lets you file the current note in a different book. Dimmed entries in the list of books indicate locations the current note cannot be moved to.
  If you have created a large number of books and this list becomes difficult to handle, you can alternatively enable a more dynamic view in Notebooks' settings, which allows you to open and close whole branches of books.
- The Action button brings up a menu and lets you decide what you would like to do with the current document. The menu is context sensitive, which means that there are different options for different document types and in different situations. The options are grouped by categories, as detailed below.

ACTIONS FOR DOCUMENTS

The selection of actions is context sensitive and depends on the currently displayed document and the the current text selection. Actions are logically grouped.

Process…

This group summarizes actions that change or convert the document.

- Format Document… converts a plain text document to HTML and it most useful when writing Markdown. Notebooks first presents a preview of the formatted document and provides further options to save a formatted copy, handle the document as a *Markdown* document or send the document by mail. The options are detailed in the section about Markdown.

- Insert/Remove Table of Contents is available for Markdown documents and inserts or removes a table of contents, which is dynamically updated with the document

- Apply Current Style is available for rich text, Markdown, imported HTML documents and webarchvies and re applies Notebooks' current document style.

- Save as Formatted Document converts a Markdown document to a formatted document. After conversion, the document can be edited with Notebooks' WYSIWYG editor, the plain text version of the document is removed from the document.
  This option can also create an editable copy of a (non editable) webarchive.

- Save as Plain Text saves a plain text version of a formatted or Markdown document.

- Save as Markdown converts a formatted document (or an imported HTML) to Markdown (this process is called Markdownify)

- Convert to Task List: This action creates a new task list and splits the text of the document into separate tasks, either by lines, by paragraphs or by "—-". You can even define your own marker (in Settings>Tasks) and let Notebooks extract those tasks specifically. This can be a very convenient shortcut for collecting todos, thoughts and ideas in a single note and transforming them into actionable items later on.

- Extract Tasks: this action is similar to the previous one, but puts all new tasks into the current list. It is available for tasks only.

- New from Selection creates a new task or documents from the currently selected text.

- Add to <Inbox> adds the selected text as a new task to your default inbox, which can be defined in Settings > Tasks. With a default inbox set, its title appears in the menu.

- Create PDF creates a copy of the current document formatted as a PDF

document. If enabled in settings, Notebooks asks you for a password before creating the PDF. More PDF options can be set in Notebooks' settings.

- Create eBook creates an eBook from the current document.
- Compress creates a zip archive from the current document and its embedded photos.

Duplicate/Copy

This group summarizes actions that copy or duplicate, without modifying the contents of the document.

- Duplicate creates a copy of the current note or document. Can be handy for templates or to have several versions of a note.
- Copy Link copies the link (URL) of the current document to the pasteboard. It can then be pasted into another note in Notebooks to create a cross-reference, or it can be pasted into a text field of a different (URL aware) application on the iPhone/iPad (e.g. Calendar or many third party app); tapping the URL then opens this note in Notebooks. The same option is available for books, too.
- Copy HTML Code puts the HTML code of a formatted or Markdown document on the clipboard, so it can be pasted into a different document or a blog.
- Copy Markdown puts the Markdown code of the current (Markdown) document on the clipboard.
- Copy Plain Text puts the plain text of the document on the clipboard.

More Actions

- Open in… and Share allow you to send the current document (or selection) to other apps on the device, or share it via Email, Facebook, Twitter and more.
  - Revert to Previous version: undo all changes you made to the document during the last editing session.

- ○ Unzip, available for zip files only, allows you to extract the contents of the archive.
  By the way, when you "open" a zip archive from the book view, Notebooks does not extract it, but shows an index of its contents.
- ○ Open in Safari, available for web archives and imported HTML documents, this option opens the original web site that the document was taken from.
- ○ Add to Album adds a copy of the photo into the Photo app's album. From there it can be used by other apps as well.
- ○ Print - Notebooks supports Apple's AirPrint technology, which allows wireless printing without an additional software installed.
  Notebooks also supports printing through some of EuroSmartz' printing apps (Print, Print & Share or DocPrinter). For more details regarding the printing apps, please refer to
  http://mobile.eurosmartz.com.
- ○ Send by Mail sends the current note or document (can be of any type) by mail directly from within Notebooks.
- ○ Quick Sync Dropbox is available when Dropbox sync is enabled and synchronizes just the current document. This may be useful for uploading or updating a single document when connected to a slow network or syncing the whole book would take too much time.
- ○ Export to iTunes - when enabled in Notebooks' settings, this option puts the current note into the folder titled Export, which is accessible and downloadable through iTunes. - After downloading this folder to your computer, you may delete it through iTunes.
- ○ Send to OmniFocus, Send To Appigo Todo, Send to Firetask and more similar actions appear when the corresponding applications are installed and options activated in Notebooks' settings. These actions create new tasks from the current note (or selection) in the selected app.
- ○ On the iPad, an extra button is available for setting font type and size for the current note.

Related Topics

- Compile Documents, an option to merge multiple documents into a single one, is available from a book's Process Multiple action menu.
- The option to turn a document into a task list and other actions to extract tasks from a document are detailed in the section covering tasks and task lists.

> You find more options how to adjust and enhance your writing experience in the settings section.

FORMATTED DOCUMENTS

Notebooks' formatted documents allow you to create formatted documents with wysiwyg style editing. That means that you see the document's final layout and format while typing, just as in text processing applications like MS Word or Apple's Pages. In contrast to the applications just mentioned, Notebooks tries to be light weight and concentrates on functionality that is essential for writing, like

- Paragraph formats (title, subtitle, headings, paragraph, quotes and more)
- Text styles (bold, italic, underline)
- Text alignment (left, right, center, justified)
- Numbered and bulleted lists
- Embedded photos
- Text colors
- Text highlighting

Please note: Notebooks' formatted documents are stored as HTML, not RTF. HTML is more flexible and can be viewed on any device and platform with any standard browser. You can edit those documents on your computer with HTML-capable applications like TextEdit, Word, Pages, and - of course - Notebooks for Mac and PC.

Basics about Formatted Documents

- Tap the text to bring up the keyboard and start writing.

- The first line of text in a document automatically becomes the document's title. When you change the first line later, the title of the document changes as well.
  If you want a title that is different from the first line, open the document's info and assign a new title. Notebooks no longer adjusts the title.

- A set of formatting buttons appears above the keyboard and allows you to quickly assign styles and formats or insert images, links, timestamps or the current position.
  If you wish, you can also activate the extra buttons available for plain text.

- To indent a list or paragraph, tap the indent button from the row of formatting buttons, or type the tab key on an external keyboard.

- To outdent, just type return on an empty line, tap the outdent button from the row of formatting buttons, or type *shift tab* on an external keyboard.

- A live counter displays the total number of characters or words in the document. With text selected, the counter displays the number of selected words or characters.

- To undo the last changes, shake your iPhone or iPod touch, or use the Undo key on the iPad's keyboard.

- To undo all changes made during the current editing session, hide the keyboard and select Revert to Previous from the action menu.

- To hide the keyboard, tap the Done button, tap the hide keyboard button on the iPad's keyboard, or simply swipe left or right across the text.

- Highlighting a phrase or assigning a text color is available from the "cut/copy/paste" menu when the keyboard is hidden (select a word or phrase and the menu pops up automatically). To remove color or highlight, just select Remove Format from the menu.

When using copy/paste between another app and a formatted document in Notebooks, the format may get a little out of control. This is what can happen in HTML, but Notebooks provides you with tools to address this situation:

- Highlight a section of the document and select Remove Format from the popup menu.
- Use Apply Current Style from the document's action menu to remove most of the extra style information.

Keyboard Shortcuts for Formatted Documents

When you use an external keyboard, Notebooks provides a set of convenient keyboard shortcuts. Press and hold the cmd key for a full list of shortcuts. You find more details in an extra section.

Document Style

The document style is responsible for the overall layout and format of a document. It defines the appearance of elements like *titles* and *sub titles*, but also controls settings like hyphenation, line spacing, size and weight of headings, size and decoration of images and more. By default, Notebooks applies its *Default Theme* to formatted documents, but you can select another style by picking one of Notebooks' built in alternatives, or by adding your own document style.

Just like most other attributes, the document style can be set at three levels:

- In Notebooks' settings: this is the default style which is applied when no other style is set.
- In a book's info: this becomes the default for the book and all its contents.
- In a document's info: overrides all other settings and is applied to this document only.

Formatted document appear with the selected style even when viewed outside of Notebooks. To achieve that, Notebooks embeds the style information into the document whenever it is is modified. That means, however, that assigning a different document style may not necessarily change a document's look right away, especially if you change the style in Notebooks' settings or a book's info. In these cases, you can either modify the document, or use *Apply Current Style*, available from a document's action menu, but also from a book's. The latter allows you to apply the new style to a selection of documents in one swoop.

Style Sheets

Notebooks' styles are Cascading Style Sheets which are common for HTML and not too hard to create and modify. Notebooks' default styles can be downloaded from our website and can serve as a good starting point for creating your own styles.

If you have a favorite style that you want to share with others, please let us know so we can put it into our download area or even include it into Notebooks.

Create Your Own Document Style

If you want to go beyond Notebooks' pre installed styles (and if you are familiar with cascading style sheets), you can easily define and add your own style sheets. Custom style sheets are saved in a hidden book at Notebooks' top level (*NBResources/CSS*) to make sure they are synced and become available on all of your devices.

To create or edit a custom style sheet in Notebooks on iPad or iPhone, this is what you do:

- In Notebooks's *Settings*, navigate to Write and Edit > Document Style select Add Your Own

- An editing window appears and displays the minimum settings that required for a style. Please note the *placeholders* for font, font size and other parameters that will be filled in automatically from a document's settings.

- You are free to add and modify the style sheet to your liking. When you are done, tap *Save* and your new style will become available in the list of installed styles.

- If you want to open and edit the style sheets like regular documents in Notebooks, search Notebooks for *NBResources* to reveal the hidden book. Then navigate to your style sheet and edit it.

Creating and editing styles sheets from your computer is even easier if you use Dropbox or WebDAV for synchronization. You can access and edit them directly from the sync folder on your computer.

A few style sheets are available from the download area on our website; they can be a good starting point for creating your own styles.

PLAIN TEXT DOCUMENTS
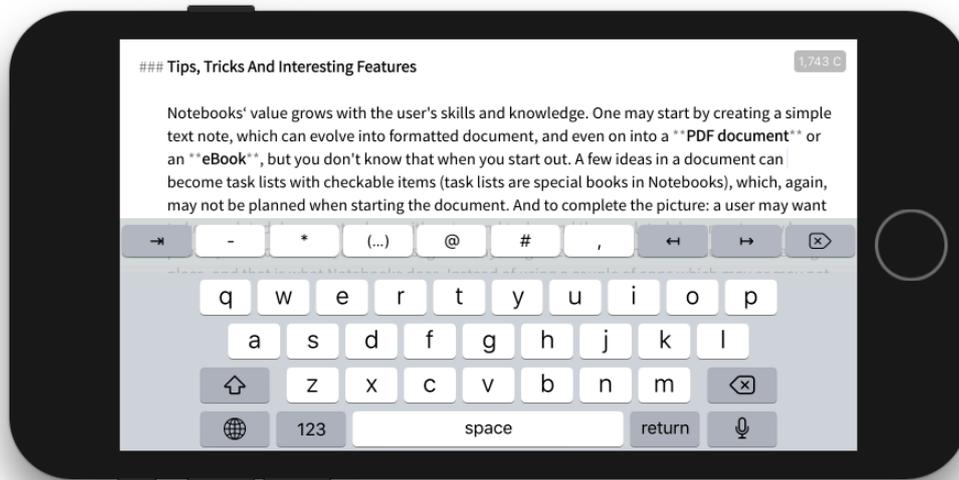
One of the main characteristics of plain text is that it does not support any type of formatting. It applies a single font, font size and color. This may sound very limiting, but it has its clear advantages: plain text is the most universal format and can be read and edited on almost any device. Typing plain text is distraction free, as there is no need to care about format and style; it is just about writing.

In Notebooks, plain text documents can be converted to formatted documents at any time, so you may start writing plain text and turn it into a formatted document later. If you want to give your plain text some style, you can use Markdown, a simple set of formatting rules. We have devoted a separate section to Markdown.

The Basics

- Use pinch and zoom gestures to change a note's font size.
- Tap the text to bring up the keyboard and start writing.

- Unless disabled in Notebooks' settings, a set of extra keys appears above the keyboard and provides quick access to special characters or cursor keys. You can redefine these keys in Notebooks' settings, but you can also turn them off if you do not need them.

- The first line of text automatically becomes the document's title. When you change the first line later, the title of the document changes as well. If you want a title that is different from the first line, open the document's info and assign a new title. Notebooks no longer automatically adjusts the title.

- While typing, a live counter displays the total number of characters or words in the document. When text is selected, the counter displays the number of selected words or characters.

- Notebooks automatically saves the text every few seconds to make sure that nothing you have written will be lost in any circumstances.

- To undo the last changes, shake your iPhone or iPod touch, or use the Undo key on the iPad's keyboard.

- To undo all changes made during the current editing session, hide the keyboard and select Revert to Previous from the action menu.

- To hide the keyboard, tap the Done button, tap the hide keyboard button on the iPad's keyboard, or simply swipe left or right across the text.

Create Lists

When you start a line with a specific character, Notebooks assumes that you are about to create a list of items and automatically places the same character at the beginning of the next line when you type *return*. This way, creating lists becomes quick and easy. A few hints:

- The characters Notebooks is watching for are -+*•>:—

- You can also create numbered lists by starting a line with 1. or 1). (When you later insert a line, the numbers won't change, though)

- To indent the current line one level, just tap the tab key anywhere on the line.

- To outdent the line one level, tap and hold the tab key or type *return* on

an empty line.

- To indent or outdent multiple lines at once, select the lines and tap (or tap and hold) the tab button.

These types of lists are not only convenient for plain text, but also for Markdown documents. When converted to HTML, the lists are converted to numbered or bulleted lists.

> In case you do not want Notebooks to detect lists automatically, you can turn off this behavior in settings.

Keyboard Shortcuts

When using an external keyboard, Notebooks provides a set of convenient shortcuts.

Shortcut	Function
cmd-T	insert time stamp
cmd-D	insert current date
cmd-W	toggle word- and character count
ctrl-cursor down	scroll page down
ctrl-cursor up	scroll page up
cmd-return	stop editing, hide keyboard
cmd-B	insert Markdown code for bold
cmd-I	insert Markdown code for italic
cmd-K	insert Markdown code for strike through
cmd-tab	outdent current selection
cmd-[	outdent current selection
cmd-]	indent current selection
cmd-alt-v	paste as Markdown

Illegal Characters

On the iPhone and iPad, the "/" character is not allowed in a document's title. When you use a / in the first line of your document, Notebooks replaces it with a "-" in the title.

On other systems, especially on Windows, several more characters are considered *illegal* in file names and might cause troubles during synchronization.

Windows illegal file name characters: < > : \" / \ | ? *

Although Notebooks does not prevent you from using those characters, we recommend against using them in titles if you are using any of Notebooks' sync options. You find more about this in the chapter Import, Export and Sync.

A Note on Right-To-Left (RTL) Text

Notebooks is capable of displaying RTL texts, and it handles mixed documents (left-to-right and right-to-left texts) correctly as well. However, at least one RTL keyboard (Hebrew or Arabic, for example) needs to be activated in iOS settings, otherwise Notebooks will not examine documents for RTL texts.

MARKDOWN DOCUMENTS

Markdown is a simple set of rules which allows you to apply style and format to plain text, which by itself is restricted to a single font face and font style. Adding Markdown to plain text enhances its readability, but maybe more importantly, Notebooks is able to convert Markdown to perfectly formatted HTML. So you can see Markdown as an alternative if you do not like WYSIWYG editing, or if you simply prefer the flexibility and simplicity of Markdown.

Besides enhancing readability and producing formatted HTML documents, Markdown has a few more advantages that might be interesting:

- The documents remain in a *standard format* (either plain text or HTML) and can be reused and edited on other devices without the need of any dedicated software.
- If you manage a blog which supports Markdown, you can prepare your posts in Notebooks, make sure they are correctly formatted, and then copy the Markdown code to your blog.
  If your blog supports HTML only, just copy HTML code that Notebooks generates from the Markdown document and create a blog post from that.
- Additional tools are available to convert Markdown documents to RTF or even PDF on a computer, so *Notebooks and Markdown can be a good starting point for a publishing process.* (see MultiMarkdown)

Work with Markdown Documents

Create a new Markdown Document

When you create a new document and already know it should be Markdown, just select *New Markdown* from the *+ menu.*

> By default, Markdown is not listed in that menu, so you need to go to Notebooks' settings *Write and Edit > Markdown Settings* and turn on the switch *List Markdown as separate document style*.

Edit Markdown Documents

When you open a Markdown document, Notebooks by default converts it to HTML and presents this formatted version. When you *tap the text once*, Notebooks switches to the plain text version of the document, and when you *tap the text again*, the keyboard appears and you can start editing.
When you finish editing and hide the keyboard (or type *cmd-return* when using an external keyboard), Notebooks switches back to the updated formatted view.

To further enhance reading and editing Markdown, Notebooks provides an option to highlight and align plain Markdown text. This option is off by default, but you can activate it in Notebooks' settings *Write and Edit > Markdown Settings > Highlight Markdown Syntax*.

> If you prefer to open Markdown documents as plain text instead of HTML, you can tell Notebooks to do so by changing the corresponding switch in settings.

Convert an Existing Document to Markdown

Existing non Markdown documents can easily be converted to Markdown in Notebooks.

- To convert a *plain text* document, select *Process > Format Document…* from the document's action menu. Notebooks presents a preview of the converted document and provides a few options to proceed. When you pick to *Treat as Markdown*, Notebooks converts the plain text document to a Markdown document.

> Regular Markdown files are saved with *.md* as file extension. So there is a convenient shortcut for converting plain text documents (which have a *.txt* extension) to Markdown: open a plain text's info and add *.md* as file extension to its title. Notebooks now handles the document as Markdown. - The conversion works in the opposite direction as well.

- *Formatted documents* can be converted to Markdown, too. This process is called *Markdownify* and creates a Markdown (plain text) file, trying to maintain the document's formatting as much as possible. To convert, select *Process > Save as Markdown* from the document's action menu.

Convert a Markdown Document to Plain Text or HTML

Markdown documents can be converted to other formats as well. The options are available from the document's action menu:

- *Process > Save as Plain Text* saves the text representation as a regular plain text document. The Markdown formatting remains intact, but Notebooks no longer displays a formatted version by default.
- *Process > Save as Formatted Document* saves the HTML version as formatted document. You can continue to edit the result like a formatted document in Notebooks using the wysiwyg editor, but the plain text version is no longer available.

Advanced: *Combined Markdown* vs. *Regular Markdown*

This section describes a non-standard way of handling Markdown documents, where the plain text and the formatted versions are kept and maintained in a single HTML document. This is what we call *Combined Markdown*, and it is specific to Notebooks.

Combined Markdown documents are edited as plain text and viewed as HTML as usual, but the conversion to HTML takes place when you stop edit-

ing. The formatted representation is saved along with the plain Markdown text in an HTML file which you can share or view on any device without the need for a specific Markdown converter. (In contrast, a regular Markdown file would appear as plain text when you don't have a Markdown converter.)

If you want to use combined Markdown files, open Notebooks' settings and turn on the switch *Write and Edit > Markdown Settings > Convert to combined Markdown (.html)*.

Modify Combined Markdown Documents on your Computer

While you won't notice any difference between regular and combined Markdown documents in Notebooks, Notebooks for Mac and Notebooks for Windows except for the document icon, you need to follow a few rules if you want to edit those documents in a different application.

Combined Markdown documents are stored as HTML and will by default open in a web browser on your computer. To edit them, open combined Markdown documents in a text editor instead and make sure that this editor ignores HTML formatting.

The Markdown text is stored as *HTML comment* at the top of the document, delimited by

```
<-- Plain Text Representation
your Markdown text
-->
```

You can change and edit the plain text, but please consider the following restrictions:

- You may remove the comment tags and the HTML code and just leave the plain Markdown text; the next time you open this document in Notebooks, the HTML version will be updated.
- If you do not delete tags and HTML code, please make sure not to change or delete the comment tags, either.
- Changes you make to the HTML code of the document will be ignored and overwritten by Notebooks.

The next time you open this document in Notebooks, the HTML version will be updated to reflect the changes you made to the plain text representation.

Markdown Reference

The following rules are the core of Markdown. The list may seem extensive (and thus a bit intimidating), but the most important options are available through Notebooks' extra keys anyway. It might still be good to know what else Markdown and Notebooks have to offer.

Headers

Use one to six hash (#) characters at the start of the line, corresponding to header levels:

```
# This is a level one header
## This is a level two header
###### This is a level six header
```

Lists

Unordered lists use asterisk (*), plus (+), and hyphen (-) as list markers. Ordered lists use numbers followed by periods, but the actual numbers you use have no effect on the result.

```
– Red
– Green
– Blue

1. Red
2. Green
3. Blue
```

Horizontal Rule

Add three or more asterisks (*), hyphens (-) or underscores (_) on a line:

```
***
```

Bold, Italic

Use asterisks (*) and underscores (_) as indicators of emphasis. Text wrapped with one of these character appears italic, text wrapped with two characters appears bold.

```
this is *italic* and this is **bold**, and this is ***bold and
italic***
```

More of the Markdown Standard Syntax

The complete syntax as defined in the Markdown standard is documented at the Markdown website.

Extended Markdown

Notebooks uses Discount, a great and fast open source Markdown converter by David Parson, which supports a few extras not available in standard Markdown. The most important additions are:

Struck through text

Wrap the text that should appear struck through with "~~".

```
This is the code for ~~struck through~~ text.
```

Centered Alignment

To center a paragraph, just wrap it with –> and <–

```
->This is a centered paragraph<-
```

Tables

They follow the definition from Michael Fortin's PHP Markdown

```
First Header  │ Second Header
------------- │ -------------
Content Cell  │ Content Cell
Content Cell  │ Content Cell
```

Footnotes

```
Text with a footnote.[^1]
[^1]: Here is the footnote.
```

Definition lists

Wrap the tag with "=" and indent the definition with four spaces or one tab.

```
=Apple=
    Pomaceous fruit of plants of the genus Malus in the family
Rosaceae.
=Orange=
    The fruit of an ~~evergreen~~ tree of the genus Citrus
```

Notebooks also supports PHP Markdown style definition lists like this:

```
Apple
:   Pomaceous fruit of plants of the genus Malus in the family
Rosaceae.
Orange
:   The fruit of an ~~evergreen~~ tree of the genus Citrus
```

Fenced Blocks

Surround the text with at least three ~ characters or four ` (back tick) characters.

```
~~~
This text appears as a code block
~~~
```

```
````
This text appears as a code block, in back tick notation.
````
```

## Pandoc Style Document Headers

If the first three lines in the document begin with a % character, they are taken

to be a document header in the form of

```
% Title
% Author
% Date
```

During conversion to HTML, Notebooks uses this information to produce a formatted document header. Notebooks' built in document styles apply specific CSS styles to this header.

> You are not limited to this sequence, and instead of plain text you could add HTLM code, for example, and insert an image instead of an author's name.

# Notebooks Specific Additions

## Table of Contents

You can add a table of contents to your Markdown document from the action menu by selecting *Process > Show TOC* (you can remove it just as easily again). The table is a structured list of clickable links to the headers in the document.

By default, the table of contents appears at the top of the document or right below the *Pandoc header* if you use one, but you can freely choose where the TOC should appear. Just add
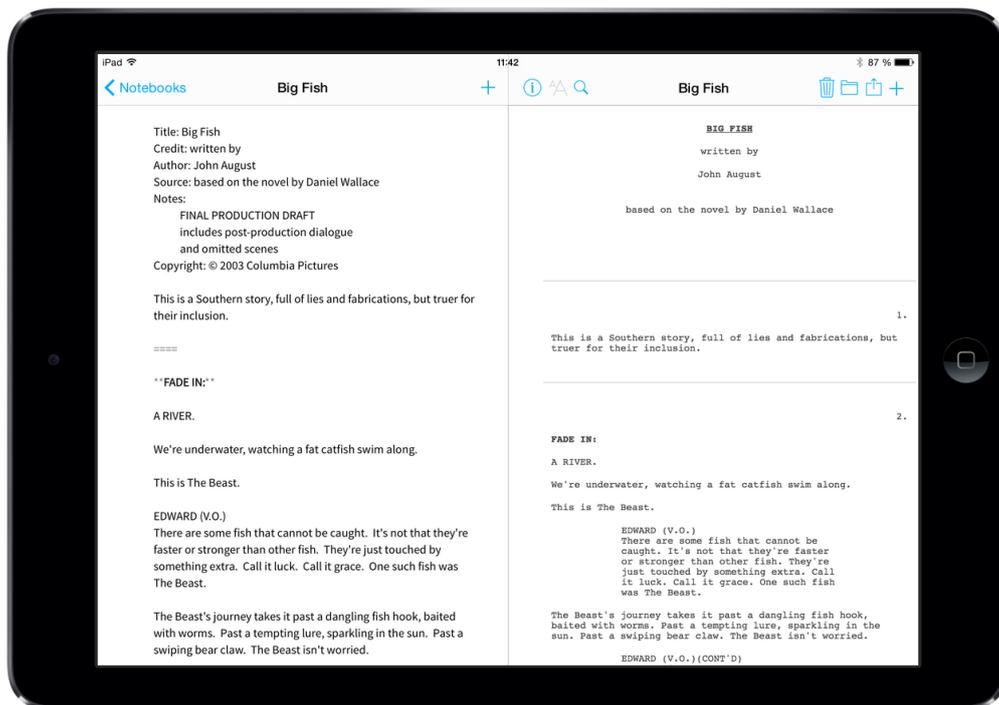
```
<TOC>
```

(with empty lines above and below) at the position where Notebooks should insert the table of contents.

# FOUNTAIN FOR SCREENWRITERS

Fountainis a simple markup syntax for writing, editing and sharing screenplays in plain text, which allows the author to work on a screenplay anywhere, on any computer or tablet, using any software that edits text files. In a way it resembles Markdown, but it has its own syntax.

Notebooks supports and handles *Fountain* documents much like Markdown documents, so you can view them as a formatted screenplay and edit them as plain text. The layout of the formatted representation follows the style suggested at the Fountain website.

# EXTRA KEYBOARD KEYS

Notebooks provides an optional row of extra keyboard keys attached to the top of the on-screen keyboard. These customizable keys (or rather sets of keys) make editing much more efficient and comfortable by providing quick access to keys that are otherwise difficult to reach, and by adding functionality that is missing on iOS devices. Here are a few examples of what these keyboard keys can look like:

| ⇥ | - | * | (...) | @ | # | , | ↤ | ↦ | ⌫ |
| ⇥ | ## | B | I | U | S | - | ••• | ↤ | ↦ |
| AbC | [§] | [=] | [¶] | [.] | [,] | ↤ | ↦ | ↩ | ⌫ |

As it is difficult to find a set of keys that is convenient and helpful for all users in all situations, Notebooks allows you to customize those keys and define multiple sets; to switch between these sets, a simple swipe gesture is enough.

## Define Your Own Extra Keys

To set up or change the keyboard keys, open Notebooks' *Settings > Write & Edit > Select Keys.*

To add a set of keys, just tap the *Add new Set* button and select one of the provided templates. These templates are suggestions that you can use as a starting point for further personalization.

To change a set's keys, follow these steps:

- Select a set from the list; Notebooks displays a column of all keys defined for the set.
- Tap the key you want to change and enter the character or *special code*

it should represent. You are not limited to a single character, you can add a whole phrase, too (although it may appear truncated on the key).

- To create an empty space on the row of extra keys, just leave one or more keys empty.
- When done, tap Save in the top right corner.

To reorder the sets, tap the Edit button in the top right corner and rearrange or delete your sets.
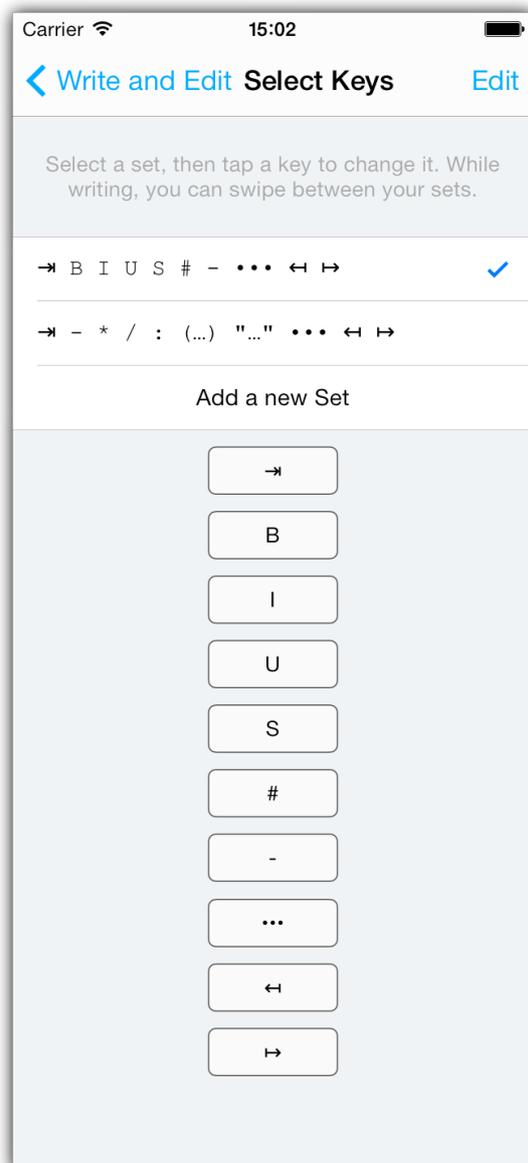
## Special Characters and Keys

Notebooks supports several keys that don't just add a specific character but provide advanced functionality.

### Matched Punctuation Marks (…)

If you want to insert parentheses, brackets, quotes or other punctuation marks that are used in matched pairs, you can combine them in a single extra key to enter both marks with a single tap. Just define them like "(…)", for example, and Notebooks will either put the opening and closing mark around the selected text or around the current cursor position. You are free to define your own marks, too, so a key like "</…>" is a valid HTML closing tag.

### Cursor Keys

Notebooks supports a few special keys for cursor movement. As it is hard to

enter those keys with the built in keyboard, it is probably best to just copy and paste them from one of the presets.

---

⇥

Insert a TAB character at the current position. When creating a bulleted or numbered list, this character indents the list by one level. *Touch and hold* to outdent the list.

---

↤

Move the cursor one character to the left. *Touch and hold* to move a word to the left.

---

↦

Move the cursor one character to the right. *Touch and hold* to move a word to the right.

---

↩

Undo. *Touch and hold* for a menu with *undo* and *redo*, so you can get both functions from a single button.

---

↪

Redo

---

For key like *undo*, *redo* and others, Notebooks displays a more intuitive icon when presenting the key on the keyboard. The characters or shortcuts here are mainly used as a simple way to set up the keys.

### *More* (●●●)

This key presents a menu of additional items to insert: images, links, timestamps or the current GPS location. To place it on a different key, just type three bullets.

## Markdown Formatting Keys

If you like Markdown, you probably appreciate the following set of extra keys.

---

**##**

Increase or reset the Markdown heading level for the current line, independent of the current cursor position. Tap and hold that button to reset heading. (It is not necessary to put the cursor at the beginning of a line to change heading level.

---

**B**

Inserts the Markdown code for bold

---

**I**

Inserts the Markdown code for italic

---

**U**

Inserts the HTML code for underlined

---

**S**

Inserts the Markdown code for struck through

---

Keys that use opening and closing tags (like bold, italic, etc) enclose selected text with these tags; when no text is selected, the opening and closing tags are placed around the current cursor position.

## Convenience Keys for Adding Context Tags

When using Notebooks' option to automatically extract and assign context tags from typed text, it can be a challenge to remember which tags are already in use and how they were spelled: was it *@wip* or *@WIP*, or even *#work-InProgress*? These two keys help you out:

---

@

Tap and hold the button for a list of context tags starting with @ that are in use in Notebooks. Select the desired tag from the list to inset it at the current position.

#

Same as above, but this button lists the tags starting with #.

A simple tap on these keys inserts the corresponding character.

## Advanced Editing Function Keys

If you write a lot using the on-screen keyboard of your iPad or iPhone, you know how hard it can be to select a word or phrase in order to delete it; placing the cursor at the right position to `backspace` a few characters can be equally challenging, especially in a moving environment - although Notebooks' *cursor keys* already facilitate that. The following shortcut keys make editing and deleting text in Notebooks a joy.

### Forward Delete: `[DEL]`

Removes the character *after* the cursor.

Tap and hold the button to *delete the rest of the current line* (this is what `ctrl-k` does on macOS).
*The key appears as reversed backspace.*

### Advanced Forward Delete `[§]`

Allows you to delete words, sentences or whole paragraphs with a single tap, depending on the character preceding the cursor.
*To be specific*: Notebooks inspects the character preceding the cursor and deletes the text after the cursor, up to the same character. A few examples will make that clearer:

- If the character immediately preceding the cursor is a space (" "), tapping [§] deletes the text up to (including) the next

space, so it deletes a word.

- If the preceding character is a period ("."), tapping [§] deletes a sentence.
- If the preceding character is a newline (*return*), you delete a whole paragraph.
- The same works with any character.

(The character *§* is hard to find on the iOS keyboard: just look for &, tap and hold it and wait or the pop up to appear).

## Advanced Forward Delete - Variations [¶] [.] [,] [!] [?] etc

These keys allow you to delete the rest of a sentence, paragraph, etc.

*In detail*: These keys insert the given character at the current position, and at the same time delete the text up to and including that same given character. Again, a few examples will help:

- [.] Inserts a period, and deletes the text up to and including the next period. So this allows you to delete the "rest of a sentence".
- [¶] Inserts a newline and deletes up to and including the next newline. So you delete the rest of a paragraph.

You can define keys with any character that makes sense for your use case.

## Connective Delete [=]

This key looks at the two characters preceding the cursor, and then deletes up to and including the same two characters. An example:

The original text goes like: *"The bar is dirty, you can almost smell the crushed pretzels on the floor."*

You want to turn it into: *"The floor was a mess."*

So you just type f[=] to get: *The f[=]~~bar is dirty, you can almost smell the crushed pretzels on the f~~loor …*

and continue with *"was a mess"*.

This is a pretty sophisticated option, and it may be enlightening to know that it was suggested by a professional translator.

Text Transformation `[AbC]`

Provides the text transformation options Capitalize, Make upper case and Make lower case for the selected text. If no text is selected, Notebooks applies the transformation to the word *under* the cursor.

---

If you use any of Notebooks' sync options, your sets of extra keys are synchronized as well. Due to the different number of keys on iPad and iPhone, Notebooks synchronizes different sets for each type of device.

---

# KEYBOARD SHORTCUTS

When using an external keyboard, Notebooks provides a set of convenient shortcuts. Press and hold the *cmd* key for a full list of shortcuts available in the current context.

We are constantly adding shortcuts, so the list below may not necessarily be up to date.

## Shortcuts for all Document Types

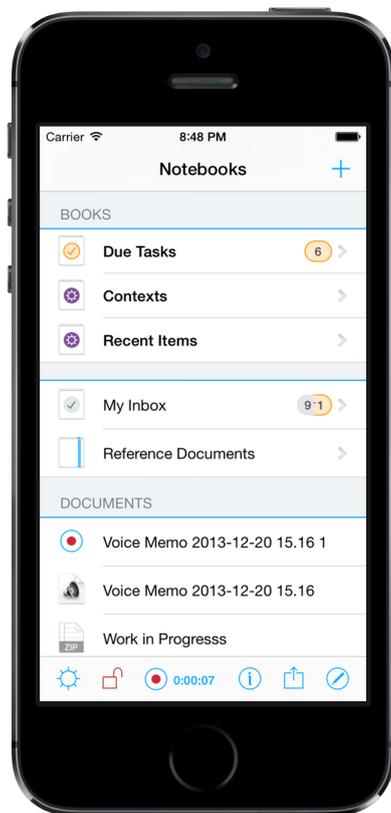| Shortcut | Function |
| --- | --- |
| cmd-T | insert time stamp |
| cmd-D | insert current date |
| cmd-W | toggle word- and character count |
| ctrl-cursor down | scroll page down |
| ctrl-cursor up | scroll page up |
| cmd-return | stop editing, hide keyboard |

## Shortcuts for Plain Text and Markdown

| Shortcut | Function |
| --- | --- |
| cmd-B | insert Markdown code for bold |
| cmd-I | insert Markdown code for italic |
| cmd-K | insert Markdown code for strike through |
| cmd-tab | outdent current selection |
| cmd-[ | outdent current selection |
| cmd-] | indent current selection |
| cmd-alt-v | paste as Markdown |

## Shortcuts for Formatted Documents

| Shortcut | Function |
| --- | --- |
| cmd-1-4 | set heading 1-4 |
| cmd-0 | set default style |
| cmd-K | strike through |
| cmd-R | insert horizontal line |
| cmd-L | toggle list style for current selection |

# VOICE MEMOS

On devices capable of recording audio, Notebooks offers an option to create voice memos. Recording takes place in the background, which allows you to type written notes or use a different app at the same time, for example.

## Create a Voice Memo

- Select *Voice Memo* from a book's *+ menu*.

- Notebooks prepares a new empty voice note, adds the *record/pause* button to the book's toolbar and starts recording.

- *Tap* the record button at any time *to stop or pause* recording.

  Voice memos are listed as documents in a book. When opened, a voice memo is presented with audio controls to start, pause or stop playing. The action menu provides the usual options.

# Embedded Voice Memos

To *embed a voice memo* into a document, copy the memo's link from the action menu and insert that link into a Markdown or formatted document via the *insert link* option (available from the ••• button). Especially in a formatted document, this allows you to listen to the recorded memo and simultaneously type in that same note, which is convenient to extract written notes from a recorded lecture, for example.

## A few Remarks

Notebooks cannot ensure that your audio session continues without interruption. The reason is that iOS always gives priority to the phone, certain alarms and alerts. To guarantee uninterrupted recording, you should deliberately silence the device by taking the following steps:

- In the Settings application, ensure that Airplane Mode turned on, for devices that have an Airplane mode.
- In the Calendar application, ensure that there are no event alarms enabled during the planned recording period.
- In the Clock application, ensure that no clock alarms are enabled during the planned recording session.
- For devices that have a Silent switch (called the Ring/Silent switch on iPhone), do not move the switch during the recording. When changing Silent mode, an iPhone may vibrate, for example, depending on user settings.
- Do not plug in or unplug a headset during recording. Likewise, do not dock or undock the device during recording.
- Do not plug the device into a power source during the recording. When a device gets plugged into power, it may beep or vibrate, according to the device and to user settings.
- Optionally turn on "Disable auto lock" in Notebooks' settings to keep the device from sleeping.

If you have set a passcode or password for your device and it automatically locks after a certain period of time, iOS turns on data encryption and makes it impossible for Notebooks to access its own files. In this situation, the audio recorder is no longer able to save its data. To avoid data corruption, Notebooks detects this situation and terminates recording in a controlled way just before iOS activates its encryption.

# SKETCHES

A picture tells more than a thousand words, and with Notebooks' vision to be the one and only notebook you will ever need, it is a logical extension to add support for drawing or writing with a stylus.

You create a new sketch by selecting this option from a book view's *+ menu*. This provides you with sheet of paper, a selection of twelve colors and a pencil of variable thickness. You can start drawing right away. If you want to change the color or thickness, just tap the Colors button in the toolbar and change the settings in the popup window. You can Undo and Redo your changes. When you have finished drawing, tap on the Done button and you changes will be saved.

Instead of creating a new sketch, you can also select an existing photo, image or sketch in Notebooks, tap the small brush icon in the toolbar and start drawing. Your changes are saved to the original photo, so if you realize that you are painting on the original and you did not intend that, you can use Notebooks' Revert to Previous action to undo all changes.

A sketch is a document of ist own, which means that you can only draw, but not type on it. However, you can easily embed a sketch into a written document:

1.  From the sketch's action menu select *Copy Link*
2.  Move to the document you want to add the sketch to, bring up the

keyboard, tap the "•••" button and select *Insert Photo > Photo from Link*. This will embed the sketch at the current cursor position.

When you are working on a formatted document, the sketch is immediately visible, but in case of a plain text note you will see a Markdown link and you need to select *Format Document* to view the sketch embedded in the text.

# USE SIRI TO CREATE NOTES AND TASKS

With Notebooks 8.7 on iOS 11 (or later) you can ask Siri to create notes, tasks and task lists in Notebooks. This is not meant to add a chapter of a novel, but rather to add a brief note and, optionally, assign it to a specific book or task list.

(You can of course add a whole chapter to you novel using *dictation*, but you do that directly in Notebooks, not via Siri from the Home screen.)

## Add a New Note

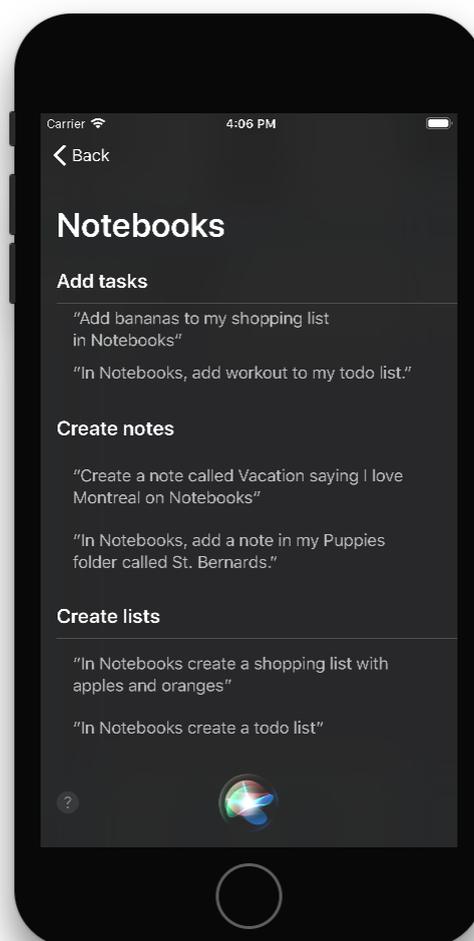To tell Siri to add a note to Notebooks, you just say something like:

*"In Notebooks add a new note with title Rome with contents a city worth visiting in the folder Vacation."*

Siri will give you feedback about success of failure of creating the new note. On success, you will find a new document in the corresponding book the next time you open Notebooks.

(To find out how Notebooks selects the target book, please see below.

## Add a Task List

To add a new task list with Siri, just say:

*"Create a Todo list in Notebooks."*

Siri will give you feedback, and upon success, you will find a new task list with the title "Todo" at Notebooks' top level.

A more sophisticated option is to create a task list and immediately add a couple of items:

*"In Notebooks create a shopping list with bread an milk."*

This command creates a new todo list with title Shopping and adds two items, bread and milk.

## Add a Task to an Existing Task List

To add more tasks to an existing list in Notebooks, just say:

*"Add butter to my shopping list in Notebooks."*

As you would expect, this command adds Butter to your existing Shopping task list.

## How does Notebooks know which Book or List to use?

When you provide a book or task list as a target in Siri commands, it is sufficient to mention the title of the book. Notebooks will search its contents for a book with corresponding title and use that, independent of where in the hierarchy the book resides. So you could have a structure like this:

- Projects
- Private
  - Vacation
- Tasks
  - Shopping

When you use *Shoppinglist* in a command, Notebooks will create the new

document in your task list at *Tasks/Shopping*.

If the book you mention does not yet exist, Notebooks creates it at its top level.

> Please note: when you say *Shoppinglist*, Siri automatically strips "list" and looks for a books called *Shopping*.
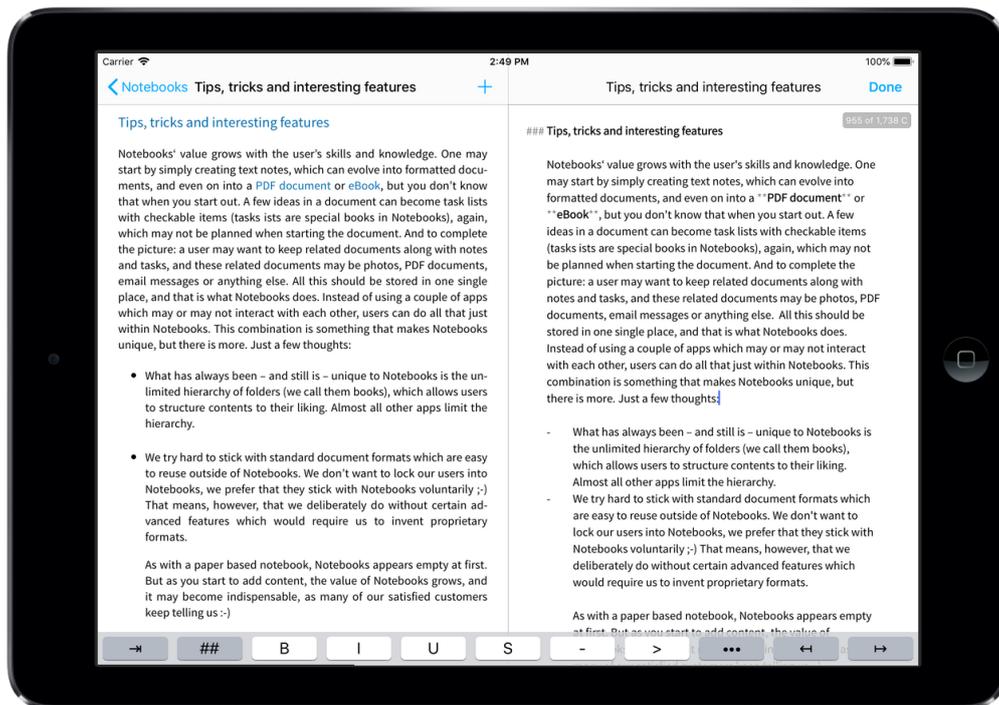
## Which Phrases does Siri Understand My Language?

To find examples Siri commands in your language, just activate Siri and then tap the ? icon in the bottom left corner.

# VIEW TWO DOCUMENTS SIDE BY SIDE (IPAD ONLY)

When using the iPad in column mode (the default mode) and in landscape orientation, Notebooks provides an option to split the screen in two halves and open a second document in the left window.

To open the second window, swipe right across the title of the document and tap the *split* button.

The two documents can be manipulated individually, and most things work as usual, but there are a few special cases as well.

- Both documents can be edited as usual.

- A swipe gesture in each document moves to the previous or next document.
- The toolbar actions are available for the right document only.

To return to normal view, just tap the <Back button in the left corner of the screen.
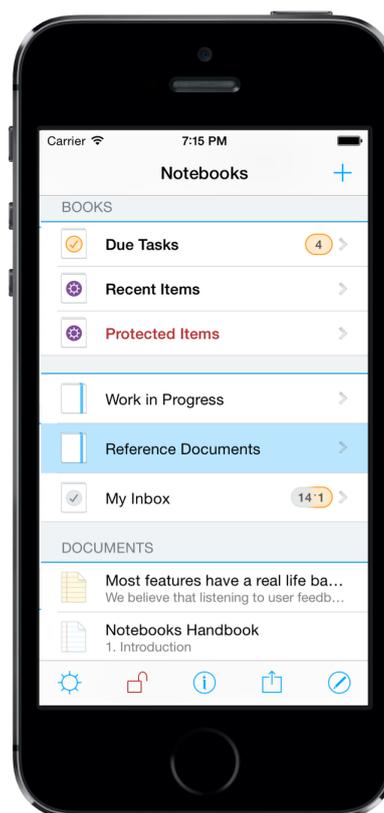
> Tip:. You can even open the same document in both windows, and all changes you make to the document in one window are reflected in the other. This allows you to edit the plain text version of a Markdown document on one side and review the formatted version of the same document on the other.

# 3. Structure Content

As the number of documents in Note-books grows, having ways to quickly and reliably access them becomes increasingly important. You can always use Notebooks' Search, of course, but some kind of hierarchical structure makes life much easier.

## BOOKS

A book is Notebooks' concept for organizing documents by topics or categories. Books can be arbitrarily nested, may contain documents and other books and thus allow you to create hierarchies and structures that match your personal style or preference. In many ways, books behave like folders on a computer.

A book divides its contents in up to three groups, depending on which kind of information is available.

1. Smart books generate their contents based on certain criteria. The contents cannot be directly manipulated.
2. Books resemble folders or directories on a computer and can contain other books and documents.
3. Documents can be plain text notes, formatted documents, PDF documents or any other type of document.

Some books or documents may appear in different colors:

- Dimmed entries indicate empty books and empty documents.
- Red entries indicate books and documents that are protected. They are visible when Notebooks is unlocked, but hidden otherwise.

## SMART BOOKS

At its top level, Notebooks may display a few Smart Books, depending on your settings and the current state. These books list documents that meet certain criteria, but they cannot be directly modified.

- Due Tasks - Provides you with a dashboard view of all your tasks and task lists. It appears when at least one task list is present in Notebooks. A more detailed description is available in the next chapter.
- Contexts - Shows a list of all context tags you use and provides quick access to the books and documents assigned to each context.
- Recent Items - Presents the list of the documents that have been recently viewed. The number of items in the list can be set in Notebooks' settings. By default, Recent Items are off.
- All Protected Items - Appears when Notebooks is unlocked and lists all items that have their protection switch turned on.

## GESTURES

- Tap an item in the list to open the selected book or document.
- To delete a book or document, swipe left across its title. A red Delete button appears, and tapping it deletes the item. Before deleting books containing other books or documents, Notebooks tries to reassure and shows a second alert to make sure you don't accidentally delete important data.
  There is no trash, deleting books and documents is final!

- The swipe left gesture reveals two more buttons: Info to quickly show the item's info view without opening it, and More, which presents a menu of actions for the selected item.

- On an iPad in landscape, swipe right across the title of a document to open the document in a second window.

- Tap the center of the navigation bar (this is where the title of the current book appears) for the Go to… menu (more details below).

- Tap and hold the *Back* button to jump back to Notebooks' top level book.

- With Dropbox sync enabled, pull down the list of books and documents until you see the refresh indicator. Pull down a bit more to trigger a Dropbox delta sync and quickly sync all changes. You find more details in the Dropbox section of this handbook.

> Devices running iOS 9 or iOS 10 use slightly different gestures:
>
> - Tap and hold the title of an item:
>   - On an iPad in landscape, the document opens in a second window.
>   - On all other devices, this gesture opens the document's info page.
> - Tap and hold the center of the navigation bar to jump back to Notebooks' top level.

## SORT ORDER

Books and documents are sorted according to your settings, which you can quickly change through the sort order control at the top the lists. Each book remembers its setting or inherits from its parent. The available options are:

- Sort by Title
- Sort by Modification Date

- Sort by State (appears in task lists instead of modification date)
Sorting by state first lists due, open and started tasks (sorted by due date), then adds done tasks (sorted by done date) and finally lists cancelled tasks (sorted by date as well)
- Sort by Creation Date (this date can be modified)
- Sort by Custom Sort Order

The sort direction can be set through an extra button, right next to the sort order control. The options are:

- Ascending
- Descending
- When custom sort order is selected, tapping the icon lets arrange the list

# THE NAVIGATION BAR

## Create new Items from the "+" Button

Tap or touch and hold the "+" button in the top right corner of the screen to create new documents in Notebooks.

- Tap the button for a menu of options:
    - New Plain Text Note
    - New Formatted Document
    - New Markdown Document
    - New Sketch
    - New Book
    - New from Pasteboard (clipboard)
    - Photo or Movie from Camera or Album
    - Voice Memo (if your device is capable of recording audio)
- Touch & hold the button to create a new empty note or document immediately. You can set this default document type or reverse the function of

this button in Notebooks' settings. More details about creating documents are available in an separate chapter.

## The "Go to…" Menu

Tap the title of the current book in the navigation bar to get a list of all available books. This is a convenient way of moving from one book to another without navigating through the hierarchy. Tap any of the entries in the list to quickly jump to that book.

There are two options in Notebooks' settings that influence the *Go to…* Menu:

- One option switches the layout from a long list of all books to a tree view that allows you to interactively open and close branches of the hierarchy. The tree view is convenient when you have a large number of books.
- The other option shows the list of recent items at the top of the menu, thus providing quick access to the history of viewed document.

By the way: the *Go to…* menu is available from a document's navigation bar as well.

# THE TOOLBAR

The toolbar across the bottom of the screen shows a set of buttons. Depending on your settings, up to six buttons may be available.

## Settings

The Settings button in the bottom left corner of each book provides quick access to application wide settings. Settings are described in detail in a separate chapter.

## Record/Pause/Stop

While you are recording a voice memo, a control button appears in the tool-bar. Tap the button to start or pause recording, touch and hold the button for a menu to stop the recording session.

## Padlock Button

The padlock is visible only when protection is enabled in Notebooks' settings. When locked (the icon is white), tap the padlock and enter the passcode to unlock Notebooks. The icon turns red to indicate that Notebooks is now un-locked and protected documents are visible. Tap the button again to lock Notebooks.

## Info

Opens the info page for the current book and allows you to view and change attributes like default fonts, number of preview lines, document style and more. This is described in detail in an extra chapter.

## Actions

The action button provides access to a wide range of actions that can be per-formed on the current book. They are detailed below.

## Process Multiple

This group of actions provides tools to manipulate a collection of documents. In addition to Delete and Move buttons Notebooks offers a variable set of op-tions which depend on the current book and selected items. These actions are described below.

# ACTIONS FOR BOOKS

The selection of actions is context sensitive, so it depends on which book you are looking at. The actions are divided into several logical groups.

## Synchronize

This group contains all actions regarding import, export and sync. You need to turn on each of these options in Notebooks' settings to make them appear in this menu. In case you make only one of these options active, it will appear instead of the Synchronize group.

- Sync - Dropbox - initiates a sync of the current book and all of its contents with your Dropbox account
- Sync - WebDAV - initiates a sync of the current book and all of its contents with your WebDAV server
- Share this Book - turns on WiFi Sharing, which allows you to access Notebooks from a computer on the same wireless network with a WebDAV capable client.
- Export to iTunes - prepares a copy of this book and its contents and makes it available in iTunes' file sharing pane from where you can copy it to your computer.

## Duplicate/Copy

- Create Duplicate - creates an exact copy of the book and its contents.
- Copy Link - copies the book's link to the clipboard. You can then paste it into another note in Notebooks to create a cross-reference, or paste it into a text field of another (URL aware) app on your iPhone or iPad (e.g. Calendar, OmniFocus and many others); tapping the URL in that app then opens Notebooks and displays this book.
  The same option is available for notes and documents, too.

## Process

- Compress creates a zip archive from the contents of this book, saving the whole hierarchy of documents in just one single file. When you unzip the archive at a later time, the original content of the book - including all system files and settings - is restored.
  When compressing the contents of a book, Notebooks respects the protection state of documents, which means that protected items are not added to the archive when Notebooks is locked.
  A few examples what to use zip archives for:
    - Temporarily (or permanently) archive books, documents or task lists you currently do not need but which you do not want to delete. If you need them again, just unzip the archive.
    - Create a snapshot (backup) of a book and its contents.
    - Send a set of books and documents or task lists to other Notebooks users, who can extract and use the original content.
- Create eBook takes the contents of the current book — including all nested books — to create an eBook.
    - Documents are added according to their sort order.
    - Plain text documents are converted to HTML (Markdown conversion).
    - Headings and subheadings are used to create the table of contents.
    - To add a cover image to the eBook, put an image with title *Cover.png* or *Cover.jpg* somewhere inside the hierarchy.
    - Notebooks does not display eBooks, but you can open them in your favorite eBook reader.
- Compile Book is similar to *Create eBook*, but the result is a single formatted document, which can be opened and viewed in Notebooks, and which can further be converted to PDF, for example. Embedded photos are preserved.

## Move

Lets you move the current book to a different location. When you select this

options, Notebooks displays a list of all available books from which you can select a *new destination*. Tap the title of the new parent to move the current book.

Some entries in that list are grayed out, which means that they cannot be used as target.

# PROCESS MULTIPLE DOCUMENTS

- Compile Documents works similar to *Compile Book*, except that is uses the selected documents only. The result is not necessarily a formatted document; Notebooks selects the "best quality" from the selected documents and produces a compiled document of the same type. So the compiled result can be plain text, Markdown or a formatted document depending on your selection.

- Archive Documents… creates a new document by combining the selected documents. Non-text documents are listed with their titles.
  In contrast to *Compile*, this option also saves due and done dates for tasks and other attributes associated with the documents, but it does not take care of embedded photos. The resulting document is plain text or Markdown, depending on the selection.
  Use this option when you want to create a book's summary or an archive of completed tasks, for example.

- Create eBook - creates an eBook from the selected items.

- Duplicate as… converts the selected items to Markdown or to formatted documents.

- Apply Current Style - This option — it is available only when at least one formatted or Markdown document is selected — assigns the applicable document style to each of the selected documents. The "applicable style" is either the inherited style or the style set in the document's attributes.

- Archive Done Tasks - Available for task lists only, this is a shortcut to delete all tasks that are marked as done or cancelled. Before deleting the tasks, Notebooks combines them into a single document and produces a *log* of your done tasks. Should you ever need those tasks again, just use

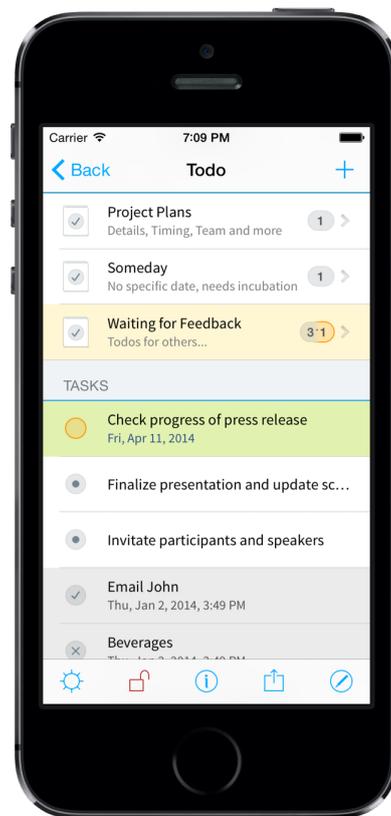Notebooks' action to split a document into tasks again.

- Compress - creates a zip archive of the selected items.
- Email - sends the selected documents by Mail.

# 4. Getting the Job Done With Task Lists

From taking notes or meeting minutes to collecting tasks and todos it is just a small step, and often one is a consequence of the other. This is true no matter whether you are writing on paper or typing on a computer or mobile device, and so it seems natural that task management has become an integrated part of Notebooks, too.

With so many dedicated task management applications available for the iPhone and iPad, why does Notebooks care to provide another alternative? There are several reasons.

1. Organizing projects, related notes and reference documents in one central space helps maintain the flow of thoughts while producing ideas and breaking them down into tasks. When it is necessary to switch between several applications, this flow is interrupted.

2. Describing a project's target or the rationale of a decision often requires more than just a few words. In Notebooks, ideas can be written down and developed no matter how verbose, while other task management tools restrict you to a field of notes. Writing is one of Notebooks' basic strengths, and converting ideas to tasks or projects is a matter of a few taps.

3. As a project develops, a single task may evolve into a small project of its

own, and the original project may quickly turn into a hierarchy of small projects. Notebooks can easily map complex hierarchies (instead of just listing tasks as a sequence), which helps you stay in control of a project and focus in on the details when necessary.

4. The *Reference Library*, which holds background material and supportive documents that help you make decisions and complete tasks, is an important part of task management and closely related to your task lists. In Notebooks, these two parts are tightly integrated, always just a few taps away. Eventually, a finished project may become part of the reference library itself.

5. Context Tags add an extra level of structure and allow you to quickly pull together books, tasks or documents from across Notebooks structure.

Before diving into the details of how to create tasks and task lists, the next section tries to give you a more detailed introduction to Notebooks' approach to task management. Feel free to skip this section, or come back to it later.

# AN INTRODUCTION TO NOTEBOOKS' TASK MANAGEMENT

When you start using Notebooks task management options after working with apps that are exclusively focussed on *getting things done*, you may feel surprised by Notebooks' flexibility: you can turn a regular book into a task list, and all items you add to that book - short notes, multi page documents, photos, PDF documents - show up as tasks. Notebooks does not force you to add details or attributes to your tasks, but you can assign due dates and alert times if you want. Notebooks may even automatically populate task lists for, if you choose. Regular books and task lists can exist anywhere within Notebooks, and you can even keep regular documents as part of task lists.

Because of the flexibility you may miss the corset of a clear separation into Today, Next, Scheduled etc., but Notebooks does cover most of it. When Notebooks contains at least one due task, or if you set Notebooks to *look ahead* for due tasks, you will find a smart book Due Tasks at Notebooks' top level, which functions like a *dashboard*:

- At the top level of the Due Tasks book you find your due and overdue tasks. This is very much like the Today section in other apps. In Notebooks, you don't explicitly assign a task to the today section, tasks show up automatically when they reach their set due date.

- You can set Notebooks to look a couple of days ahead and also show tasks that are about to become due. In a way this is like a Scheduled section, because you see tasks with a due date within the next up to seven days.

- Tasks without a due date are obviously set to be done someday, but we don't think they need an extra section.

- The dashboard also provides a Calendar view highlighting the days on which tasks become due. Select a date from the calendar to view the tasks that need to be done on that day. - This can also be compared to the Scheduled section you may know from other apps.

- You can directly access All Task Lists from the dashboard, no matter where in Notebooks the lists are actually stored. Each list shows a badge indicating the number of open and due tasks, you can open the list, view and work on the tasks, change their states etc. This is a convenient short-cut if you want to focus in on your tasks.

- What you may miss is a dedicated Next section, listing the upcoming tasks for various projects. We deliberately skipped that, because we feel that it is more efficient to concentrate on a specific project and decide what to do next, instead of looking at a set of more or less unrelated tasks. But maybe this is just the way we work ;-)

- To complement the dashboard view you can a use Notebooks' Context Tags. So if you want a specific group Someday, for example, you create a context and assign that to selected tasks.

We hope that this brief overview can help you get familiar with Notebooks' way of task management.

# CREATING TASK LISTS

In Notebooks, a task list is a book that displays its contents in a slightly different manner. Books and task lists can be converted back and forth without losing any information.

To create a list you have several options:

1. Create a new book and turn on the switch labeled *Show as Task List*
2. Open a book's info page and turn on the switch labeled *Show as Task List*
3. From a document's action menu, select *Convert to Task List* or *Extract Tasks* (more details follow below)

To convert a task list back to a book, just turn off that switch again.

## Special Features

- Task lists have a specific icon and show a badge with the number of open and due tasks.
- You can put any type of document into a task list.
- Just like books, task lists can be nested. This is a convenient way of breaking projects down into more manageable sub projects. At each level, a list's badge counts the open tasks of all sub projects.
- In a task list, documents/tasks are displayed with tappable icons representing their current state:
    - Open
    - Open, due
    - Started
    - Started, due
    - Done
    - Cancelled

- Tasks can have *due dates and alarm times* assigned (you do that on a task's info page). When a task's due date is reached, its icon turns orange and the task list's badge indicates the presence of due actions. Notebooks' icon on the Home screen also updates the number of due items.

- A task list displays a task's due date below the task's title. When a task is done or cancelled, its *completion date* appears instead of the due date.

- All due tasks appears in the smart book *Due Tasks*.

---

# CREATING TASKS

## Add a Document to a Task List

Adding a document to a task list is the most obvious way of creating a new task. This can be a short plain text note consisting of a single line of text, an extensive document, meeting minutes, a sketch, a photo, a PDF document, in fact any document that Notebooks can handle.

> A task list is just a book that presents its contents in a slightly different manner, so it is the book that makes the difference, not the document.

## Turn a Document into a Task List

When you start writing, you cannot anticipate that you end up collecting tasks. Just think of meeting minutes, a brainstorming session or a quiet moment when you write down you thoughts and ideas. In the end, you may have created a list of todos, but they are in one single document rather than separate items on a todo list. Notebooks offers a convenient solution:

- From the document's action menu, select Process > Convert to Task List…

- You are provided with options how to split the contents of the document into separate tasks: either by line, by paragraph, or don't split it at all and put the whole document into a new task list.
(There is a special option *Extract at…* that looks for specific markers in your text, but that is described in more detail below. )

In detail, this is what happens:

- Notebooks creates a new task list (book) and gives it the title of your document; if a book or task list with that name already exists, Notebooks uses that instead of creating a new one.
- Depending on your selection, Notebooks splits the document by paragraph or line and adds the segments as tasks to the list.

> If the document you want to split is already located in a task list, the action menu shows an additional action Process > Extract Tasks… which basically works as above, but instead of creating a new list it adds the tasks to the current list.

## Extract Specific Tasks From an Existing Document

Sometimes, splitting the whole document by line or paragraph may not provide enough flexibility. Let us look at an example again: meeting minutes may contain the list of participants, topics covered, decisions made, and — scattered across these sections — a couple of todos, which you now want to extract.
In this case, the above actions won't do what we need, because they take the whole text and split it by line or paragraph, producing far more tasks than we actually have. For this situation, Notebooks offers a more sophisticated action to extract specifically marked tasks only.

You first need to define a *marker*, which is a character or sequence of characters that you use at the *beginning of a line* to indicate that the following text is a task.

- Open Notebooks' settings and navigate to Tasks > Prefix to mark a line as Task.
- Type the character, phrase or sequence of characters you want to use. Examples are "!!", "#", "-", "TASK", but you are free to set whatever you like.
  (In our example we will use the marker "!!", so lines starting with "!!" indicate a tasks).

With the marker set, the actions *Convert to Task List* and *Extract Tasks* provide an additional option Extract at !! (provided the marker actually appears in the document). Selecting this option triggers an action similar to the one described above, except that Notebooks extracts only the lines which you have marked as task. You can even select this action multiple times and Notebooks will do its best not to produce duplicate tasks.

When you mark any of the extracted tasks as done or cancelled, Notebooks tries to update the original document (that is the document the task was extracted from) to reflect that task's current state. Looking at the meeting minutes (from the above example) immediately reveals which tasks have been completed and which are still pending.

> If the document is located in a task list, new tasks are extracted to the list. If the document resides in a regular book, Notebooks creates a new nested task list with the title of the document; if a list (or book) with that name already exists, Notebooks uses that.

## Automatically Extract Tasks after Editing

Notebooks provides an option to automatically extract marked tasks from a document as soon as you are done editing. You need to make this active using the corresponding switch in Settings, where you can even tell Notebooks to put extracted tasks into your default inbox instead of the task list associated with the document.

## Send Selected Text to a Default Task List (Inbox)

In the world of tasks and task lists it is common to have a so called Inbox, a list that holds unsorted todos, temporary items or tasks that you need to further dispatch to other lists. An inbox is a convenient place to store things you want to take care of later.

Notebooks does not force you to use a specific inbox but instead allows you to set any of your existing task lists as you *default task list.*

- Open Notebooks' settings, navigate to Tasks > Default Inbox
- Select the list you want to use as your inbox. This can be any of your task lists, but it might be good to use a list that is located at the top level of Notebooks, so you always have quick access.
  (For further illustration, let us assume that the selected task list is called "Inbox").

With a default inbox set, you can now highlight text in any editable document within Notebooks, even while typing, and select Add to Inbox from the popup menu. Notebooks takes the highlighted text and creates a new task in your default inbox.

> This is a convenient way of collecting todos as you stumble over them, or as they come to your mind. - You may be working on some project when you remember you need to buy some peanut butter. Without leaving your current document, simply type "Buy peanut butter", highlight the three words, select "Add to Inbox" and you are done. Delete the text and continue with your project.

# DUE DATES, ALERT TIMES AND REPEAT INTERVALS

If you need to complete a task at a specific date, or you want to start it on a

certain day, you can assign it a due date. You do assign the date in multiple ways:

- Open the task's info and tap Due Date. You can now select the due date from the calendar.
- Tap and hold a task's icon until the date selector pops up. You can do that from the task list, or in a task's toolbar (top right).

When the due date is reached, several things happen:

- The due task is displayed with a special, highlighted icon, and the badge for the task list adapts its count
- The task is listed in the smart book Due Tasks
- The badge on Notebooks' icon (on the Home screen) increases its count

To make sure you do not forget about a task on its due date, you can assign an alert time in addition to the due date. When an alert is set, Notebooks plays a sound on that time, and it also displays a banner to alert sheet.

In addition to a due date you can also set a repeating interval for recurring tasks. After the set interval Notebooks will remind you of the task again.

> If you deactivate notifications for Notebooks in your iPad's or iPhone's Notification Center, Notebooks will be unable to play sounds and display alerts!

# TODAY WIDGET - YOUR DUE TASKS IN NOTIFICATION CENTER

Swiping down from the top edge of the iPad's or iPhone's screen reveals the iOS Notification Center,which provides a quick glance at the current weather, stock quotes and more. Apps may provide so called *Today widgets* to present some of their information as well.

Notebooks includes a today widget to show the list your due tasks. By default, this widget does not appear in notification center. To make it visible, unlock the iPad or iPhone and swipe down from the top edge of the screen. At the bottom of the today view (you may need to scroll down a bit) you find an *Edit* button. Tap the button for a list of apps providing widgets. To enable Notebooks' widget, just tap the green + sign.

If Notebooks has any due tasks, they will appear in the *Notebooks* section of your today view. The tasks show the familiar icons which can be tapped to toggle the state (starting with an open task, the sequence is *started*, *done*, *canceled*, *open*). When you mark a task *done* or *canceled*, Notebooks removes the item from the list after a few moments.

The list of visible tasks is limited to seven. If you have more than seven due tasks in Notebooks, the text on the last row informs you about that. Tap that row to open your due tasks in Notebooks, if you want.

In the case of protected due tasks, Notebooks just shows *Due Task* instead of displaying their titles, which might already reveal confidential information.

# SHOW ITEMS AS REGULAR DOCUMENTS

Sometimes it may be convenient to keep a few items in a task list which appear as regular documents, not as tasks. These documents may serve as description or documentation of the project, or it may be a place to quickly collect thoughts and ideas without immediately turning them into tasks. Taking advantage of Notebooks' option to automatically extract tasks from written text, these documents could serve as the base from which you quickly create new tasks for the current project.

## Turn a Task into a Document

To turn a task into a regular document, just follow these steps:

- Open the task's *Info*

- Turn off the switch *Show as Task*

Notebooks now handles this item as a regular document: there is no task badge, not due date, the item does not count as open task. In all places this item looks and behaves like a document. The setting of this switch has no influence on the document itself, because tasks are always stored as regular documents.

> You can tell Notebooks to display selected tasks as documents in a task lists, but it is not possible to display documents as task in regular books.

## TASK LISTS AND PROTECTION

As always, Notebooks does not give any indication of protected items when it is locked. You do not see any protected tasks, and the task lists' badges will not count them, either. There is one exception, though: when a protected task becomes due, Notebooks' icon on the Home screen will indicate that, but to see it on the list you need to unlock Notebooks.

## ARCHIVE COMPLETED TASK LISTS

When you have completed all task in a list but are not yet ready to delete it, you can quickly create a compact and space saving archive. There are multiple options:

1. From the task lists's action menu, select Archive Done Tasks…. Available for task lists only, this is a shortcut to delete all done or cancelled tasks, but before deleting the tasks, Notebooks combines them into a single document and produces a log of your completed tasks. Should you ever need those tasks again, just use Notebooks' action to split a document into tasks again.

The first time you archive tasks in a task list, Notebooks creates a document *Done Tasks* and internally marks it as an archive. You can rename that document if you prefer a different title, and Notebooks will still recognize it as archive for your done tasks. The next time you archive tasks in that list, Notebooks appends them to the existing archive.
A note on non editable documents like PDF: Notebooks cannot add their content to the archive, so it does not automatically delete them, but instead just adds their titles and task state to the archive.

2. From the task lists's action menu, select Process Multiple > Combine Notes… and merge all tasks (not only done or completed items) into one document. In the resulting document, done and cancelled tasks are specifically marked; the document is searchable so tasks can be easily tracked down; should it be necessary, you can restore the original list can by splitting the document into separate tasks again.

3. From the context menu, select Compress and create a zip archive. All task states and system files are be preserved, so you will be able to restore the task list's current state by extracting the archive anytime later. You can also export or email this archive.

## SMART BOOK "DUE TASKS"

When Notebooks contains at least one task list, the smart book Due Tasks appears at the top level. It provides a dashboard view and quick access to your lists and tasks.

The dashboard is divided into three areas:

- A lists of all due and overdue tasks. The items that are most overdue appear at the top. You can set this smart book to look ahead for tasks that will become due within the next couple of days. You do so either in Notebooks' settings, or through the smart book's context menu.

- A consolidated list of all task lists, no matter where they are stored in Notebooks.

- A calendar with a timeline view of the things to do. Days that have tasks

assigned are specially marked, and selecting a marked date displays the list of tasks for that day.

The calendar that allows you to set a task's due date (or a document's creation date) has a few special features worth pointing out:

- To quickly jump a year forward or back in the calendar, just touch & hold the forward or back buttons.
- Tap the Today button to jump to and immediately select the current day.
- Days that already have tasks assigned display a small marker. Select a marked date to display the list of tasks that have been assigned for that day.

> You can permanently enable the smart book Due Tasks even when no items are due. All you need to do is tell Notebooks to look ahead for due tasks: in settings, navigate to Tasks > Look ahead for Due Tasks.
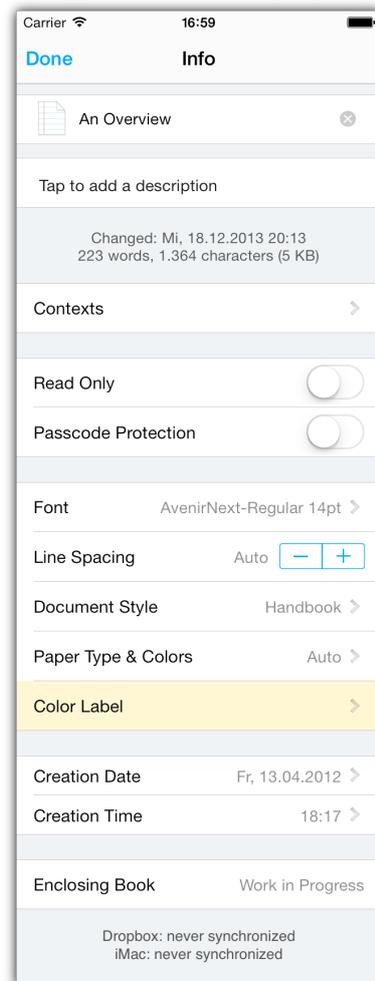
# 5. Properties

Notebooks assigns a set of properties to all books, documents and tasks. Some of these properties like title, description or creation date can be changed, others are read only. You access an item's properties from the *info page*.

## OPEN THE INFO PAGE

There are several ways to open the Info page in Notebooks.

1. Touch and hold an entry in the lists of books and documents to open that item's info. *When using Notebooks on an iPad in land-scape mode, this gesture opens the selected document in a second window.*

2. Swipe left across an entry in the list of books and documents and select *Info*.

3. From any book or document, tap the Info button in the toolbar.

## PROPERTIES FOR BOOKS

A book's info page displays the following set of attributes:

- The book's title, which can be changed here
- A description or abstract for the book; it is searchable and appears as preview in the list

- Date and time of the latest change

- The number of books and documents contained in this book and all subordinate books. These numbers are calculated dynamically.

- The switch to passcode protect the book and its contents (protection needs to be enabled in settings)

- The switch to convert the book to a Task List or vice versa.
  When reverting a task list to a book, Notebooks asks if the tasks' details, like their states and due dates, should be preserved for the case that the book might be converted to a task list again.

- If enabled in settings, an option to assign context tags to this book. You assign contexts simply by setting or removing checkmarks in the dedicated view. In this view, you can also conveniently add new context tags.

- An option to set the number of preview lines for documents in the list. Previews can be off, one to five lines long, or automatic. Auto means that the parent's setting is used.

- Set the default font, font size, text alignment, hyphenation, line spacing etc. for the contents of this book. The selected settings are used for all documents in this book; the font is also used for the list of books and documents. Select *Default* if you want the book to use its parent book's settings.

- Colors lets you define the font color and background pattern for documents in this book. It is an option to give each book its individual look. For the background, you can set a solid color, select from a set of predefined background patterns (these are used for plain text only), or import your own image or pattern to use as background.
  As with the default font, these settings can be inherited from the parent book.

- With document style you set the style that should be used for formatted and Markdown documents in this book. Again, this setting is inherited. (The document style defines how elements like heading or lists should be formatted.

- An option to change the color of the list cells in this book. The selected colors is used down the hierarchy until a book defines a different color.

- The Creation Date is set automatically when a book is created or imported, but Notebooks gives you the option to change this date and time.

- Show in parent is especially convenient if you open a book from a list of search results of from another smart book and want to jump directly to the book's parent.

# PROPERTIES FOR DOCUMENTS AND TASKS

A document's info page shows this set of attributes:

- The document's title, which can be changed.
- The description is searchable and appears as preview.
- Date and time of the latest change.
- Word and character count for editable documents.
- Pixel dimensions for photos.
- File size for other document types.
- The switch to passcode protect the document.
- An option to write protect editable documents.
- Assign context tags to the document.
- Editable documents provide options to change the font, font size, text alignment, hyphenation, line spacing etc. for this document. These settings override the settings of the containing book and the global preferences.
- Colors lets you define the font color and background pattern for the document and override the default settings or settings of the parent book. For the background, Notebooks gives you the options to set a solid color, select from a set of predefined background patterns, or import your own image or pattern to use as background.
- Formatted documents offer an option to set the document style.
- The Creation Date is set automatically when a document is created or imported, but Notebooks gives you the option to change this date and time.
- Show in parent is especially convenient if you open a document from a list of search results of from another smart book and want to jump direct-

ly to the book's parent.

If available, Notebooks displays some more information at the bottom of the screen, like the latest sync dates, an imported document's original URL, the date a document was sent by mail or printed and more.
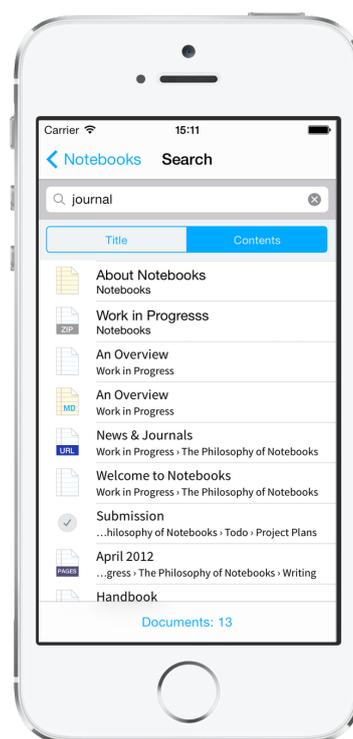
## Additional Properties for Tasks

Items stored in a task list show a few additional attributes:

- Show as Task this switch is *on* by default, but you can turn it off if you want to handle an item like a regular document. A regular document does not have a task state and does not add to the count of open or due tasks.
- Options to set due date and alert time.

# 6. Search

## SEARCH FOR BOOKS AND DOCUMENTS

Each book provides a search bar across the top of its list of books and documents. Tap that bar to activate the keyboard and enter a search term. Notebooks gives you the option to search the titles of books, task lists and documents, or the contents (full text) of documents. Full text search is supported for plain text, HTML, RTF, iWork and MS Office documents, as well as web archives. With the optional PDF Reader activated, Notebooks searches the full text of PDF documents as well.

- Notebooks limits its search scope to the hierarchy of the current book. Start your search at the top level book to search the whole contents of Notebooks, or focus your search by navigating to a specific book.

- To further focus you search, enter more than one search term. Notebooks shows only documents that contain all terms you enter.

- To search for an exact phrase, put it in "quotes".

- When you open a document from the list of results, Notebooks highlights all instances of your search key and scrolls to the first phrase in the note. When the phrase appears in the note more than once, Notebooks provides navigation arrows to quickly jump to the next or previous spot.

- Swipe across the note or document to move to the next or previous doc-

ument in the list and quickly skim through all search results.

- To edit a document opened from the results table, tap "Done" first to return to normal view.

- For iWork documents, please make sure not to include a preview when saving them, otherwise their contents cannot be searched.

## SEARCH THE CONTENTS OF A DOCUMENT

If you want to search for phrase in the current document, tap the loupe icon in the document's toolbar. Enter the search term and tap the search button or return key. Notebooks then highlights all instances of the search term. When searching a document' text, Notebooks interprets the search term as a phrase and highlights exact matches only.

# 7. Protection

Notebooks provides an effective way of keeping confidential information hidden from prying eyes. When locked, Notebooks hides protected books and documents and never reveals any indication of their existence: these items are not listed in books, do not appear in search results, recent items or any other context.

> It is important to understand that Notebooks' protection is different from encryption. When Notebooks protects a document, it just does not display it unless you have unlocked Notebooks. However, when you export or sync these documents to a different device or system, they are unencrypted and can be opened without passcode.

## USE PROTECTION IN NOTEBOOKS

### Enable Protection

Protection in Notebooks is disabled by default. Before you can restrict access to books and documents you need to enable protection: move to Notebooks' Settings > Protection and turn on the switch. You are asked to provide a four digit passcode.

After dismissing the Settings pane, a white closed padlock icon appears in the center of each book's toolbar to indicate that protection is enabled, but Notebooks is locked.

The reason Notebooks provides this global switch is that users who do not care about protection do not need its traces throughout the interface. Also, there might be times when it is convenient to temporarily disable protection in

one quick step and re-enable it later.

## Lock and Unlock Notebooks

When Notebooks is locked, none of the protected books or documents are visible. Not even their titles are displayed.

To unlock Notebooks, tap the padlock icon and enter the passcode. The padlock icon will change to a red unlocked padlock which alerts you that all protected books and documents are now accessible.
After three failed attempts to unlock Notebooks, login is blocked for five minutes.

If your device supports Touch-ID you can unlock Notebooks with your fingerprint as well. You need to enable this option in Notebooks' settings, though.

To lock Notebooks again, tap the red padlock icon. Protected items will be hidden and Notebooks will automatically move to the closest unprotected book.

## Unlock with Touch ID

If your device supports Touch ID, you can use your fingerprint to unlock Notebooks instead of entering you code. You can activate Touch ID in Notebooks' settings.

## Protect Individual Books and Documents

With protection enabled, you need to tell Notebooks which books and documents are confidential and should be kept safe. You do this in the info view by flicking on the switch labeled Passcode Protection. You can always protect documents and books, no matter whether Notebooks is locked or not. To remove protection, however, Notebooks needs to be unlocked.

A protected book hides all of its contents as well. So instead of protecting many individual documents you could put all of them into a protected book.

## Request Passcode on Launch

To enforce passcode entry on launch and protect the whole contents of Notebooks, turn on protection for the top level of Notebooks. To do so, move to Notebooks' top level, tap the *Info Button* and turn on protection. From now on, Notebooks will always ask for the passcode at launch.

## Require Passcode Immediately

When you close Notebooks while in a protected book or document, you need to enter your passcode to open it again. By default, you need to enter the code even if you close Notebooks for just a few seconds. This is controlled by option in Notebooks' protection settings: Require Passcode Immediately. When you turn this switch off, Notebooks will not require the passcode if you reopen it within 30 seconds.

## Change the Passcode

To change your code, open Notebooks' settings for protection and select Change Passcode.

# WHAT HAPPENS WHEN BOOKS AND DOCUMENTS ARE PROTECTED?

- There is no hint of any protected item, not in any list and not in search results.

- When unlocked, protected items are listed with red titles, which makes them easy to identify and alerts you of working on protected books or notes.

- Protecting a book hides its contents as well. So instead of protecting each single document you can also protect the book.

- Moving a protected book or document to a different location does not change the protection state.

- If your iPhone/iPad goes to sleep while Notebooks is unlocked you need to enter the passcode when turning the device on again. If you tap *Cancel* instead of entering the code, Notebooks locks itself and moves to the top level book.

- Protected documents and books are ignored during export and synchronization when Notebooks is locked. When unlocked, Notebooks synchronizes protected items as well, and please be aware: protected documents are stored on the server in an unencrypted format!

# SMART BOOK - PROTECTED ITEMS

When protection is enabled and Notebooks unlocked, the smart book Protected Items appears at the top level. This smart book provides a convenient shortcut to all your protected items.

# 8. Backup

The value of Notebooks grows with the amount of information and effort you put into it, and it is essential to have a reliable backup strategy in place that allows you to quickly restore all documents in case anything goes wrong with your iPhone or iPad. This chapter describes several methods how to save the contents of Notebooks to your computer or another backup system, and how to restore it again.

## BASIC TIPS

> "It's a matter of when you will lose data, not if."

This is a saying in the IT world, so we should always be prepared and follow two basic recommendations:

1. Backup regularly
2. Do not rely on a single backup

You should take these tips seriously for all your data, not only for Notebooks.

## AVAILABLE OPTIONS

### Back up through iTunes

This is probably the simplest and most convenient method, but it is often overlooked by our users. Every time you connect the iPhone or iPad to iTunes

and synchronize, the contents of Notebooks is saved to your computer. The documents are stored in a location predefined by iTunes, and they cannot be easily read or changed, but they are there in case you need to reset the device or restore it from a previous backup.

A few applications are available that can extract data and documents from an iTunes backup (if it is not encrypted). Two examples are

http://www.iphonebackupextractor.com/
http://supercrazyawesome.com/

## Save the contents of Notebooks through iTunes' File Sharing

On the iPad and on iPhones running on iOS4 or later, Notebooks is capable of exchanging documents through iTunes' Files Sharing. This is described in more detail in the next chapter, but in this context it is important to know that the top level book of Notebooks (it is titles "Notebooks") is visible as a folder in the File Sharing panel in iTunes and can easily be saved to your computer. To do so, select the folder "Notebooks", click on "Save to…" and select a location on your hard drive. This will save the contents of Notebooks (including all system files and your protected files) to your computer and give you freely accessible backup of all your data.

Currently, iTunes' Files Sharing is unable to import folders, it can import single files only. This means that a restore through File Sharing is not as simple as a backup, but it is not complicated either. Instead of importing the "Notebooks" folder you would compress the books that this folder contains (you create a zip archive for each folder) and import the zip archives. Notebooks will detect these archives and move them into its top level book, where you can choose to extract them. This will restore the contents of the books.
More details about this are available in the next chapter.

As an alternative to iTunes File Sharing you could take the contents of the previously exported "Notebooks" folder and import it through Notebooks' WiFi Sharing option. This is another method for moving the contents of Notebooks do a different device, too. It is not synchronization, but it is a quick method of filling Notebooks with an initial set of documents.

Details about Notebooks' WiFi Sharing are available in the next chapter, too.

## Synchronize Notebooks with a Cloud Service

Finally, each of Notebooks' export and sync options can be used for backup too. Notebooks supports Dropbox, WebDAV servers and has its own built in server, so there are enough options that you can pick from. They are all detailed in the next chapter.

# 9. Import, Export and Sync

## DEFINITION

### Synchronization

Synchronization is the process of keeping the contents of Notebooks consistent with a folder on your computer or a server on the internet. All changes, no matter whether you make them in Notebooks or on your computer or server, will be copied to the "other side" during the synchronization process. You would choose sync if you start a writing project on your computer and want to continue writing while on the way: you sync the documents from your computer to Notebooks, proceed your writing on your iPhone or iPad while you are on the road, and when you return to your desk, you sync the changes back to the computer. Notebooks lets you select which book(s) you want to sync, because in real life it is not always necessary to sync the whole contents of Notebooks. Just bring up the context menu of the book you want to sync (tap on its title in the navigation bar), and from the menu that appears choose Synchronize with Dropbox, your favorite WebDAV server or SyncDocs. You select which you want to use in Notebooks' settings.

> Dropbox sync provides an option to automatically sync changes, even while you are not using Notebooks. This is currently the most convenient option.

### Import

Import is a quick way of getting documents into Notebooks, which does not care about consistency of data. It is available through Notebooks' WiFi Sharing, iTunes File Sharing, but also from Mail, Safari or other apps.

## Export

Export is the opposite, a quick way of getting documents out of Notebooks, with no priority on consistency. Export is available through Notebooks' WiFi Sharing, iTunes File Sharing, Mail or the "Open in…" action, but also through any of its sync options.

> Notebooks stores all its documents as regular files in a hierarchy of regular folders. The documents are saved in standard formats like *txt* or *html*, so they can be opened and viewed on any device without any proprietary software.
>
> Should you ever need to export the contents of Notebooks and reuse it elsewhere, you can use any of the above mentioned methods to transfer the (hierarchy of) documents to your computer or another device; the result will be a hierarchy of folders (corresponding to your books) containing all your documents in a standard, readable format.

# BASIC INFORMATION AND RECOMMENDATIONS

## Supported Document Formats

Although Notebooks accepts all types of document during import and synchronization, there is a set of types that Notebooks is known to handle well. Other document types may or may not be displayed correctly.

- .txt, .tex, .h, .m, .pl, .pm, .t, .xml, .text, .log, .rb, .bat, .ly, .java, .js, .p, .cc, .el, …
- .html
- .pdf
- MS Office (.doc, .xls, .ppt, .pps, .docx, .xlsx, .pptx)
- Apple iWork (.pages, .key, .numbers, .pages.zip, .key.zip, .numbers.zip)
- Rich Text (.rtf, rtfd.zip)

- Photos (.gif, .jpeg, .jpg, .png)
- Email messages (.eml)
- Audio and video
- Safari web archives .webarchive
- .db for importing from iPhone/iPad Notes app, .palm for importing Palm Memos

## Document Encoding

To ensure maximum compatibility, the standard document format in Notebooks is Unicode (UTF-8). Notebooks tries to import any other encoding as well, but in some rare cases the text in Notebooks may look different from its representation on your computer. The same is true the other way round, the text on your computer may display some weird characters. In such cases just make sure to either save documents as Unicode before transferring them to Notebooks, or to open them on your computer with a unicode-capable application (TextEdit on a Mac, WritePad on a PC - or of course Notebooks for Mac and PC ).

## Restrictions for File Names and Titles

In Notebooks, the only restriction regarding titles is that they must not contain the slash "/" character. Notebooks takes care of this automatically and converts these characters to a dash "-".

> When exchanging files with a computer, especially with Windows, the following set of characters is "illegal": < > : \" / \ | ? * .
> You should generally try to avoid these characters in the titles of books and documents, but Notebooks does not enforce that.

## Protection

As a security measure, protected documents are exported only when Notebooks is unlocked. This should avoid that sensitive data is exported without your explicit knowledge.

---

# IMPORT FROM OTHER APPS

Applications like Mobile Mail, Safari and many third party apps offer the command "Open in…", which allows you to open and view a document in Notebooks. This can be convenient for saving email attachments or documents you find while browsing the web. – Notebooks is capable of opening and storing many document types, so it should appear in the "Open in…" list in most cases.

> If Notebooks does not appear in the list, the most likely reason is that too many applications are installed that can handle the selected document. In this case, the only solution is to remove apps you do not frequently use until Notebooks appears on the list.

# THE NOTEBOOKS BOOKMARKLET

Notebooks offers a convenient option to import a page or document you are currently viewing in Safari on your iPhone/iPad/iPod touch. This requires a little preparation, though:

Copy the text below and save it as a bookmark in Mobile Safari.

```
javascript:window.location='notebooks://grab/'+escape(window.location)+'&title='+encodeURI(document.title);
```

The best way to do this on the iPhone/iPad is by adding an arbitrary bookmark and then modifying its title and URL, following these steps:

- in Mobile Safari, save an arbitrary page as bookmark
- open Bookmarks
- tap on "Edit" on the lower left corner
- now tap on the title of the bookmark you want to change
- you will see two cells, one with the title, which is activated for typing, and the other one with the URL; if you want, change the title first
- then, tap on the URL (you may need to tap and hold a bit), delete the text and paste the javascript from above.

Alternatively, you can add this link to Safari on your computer and sync the bookmarks to your iPhone/iPad.

To import a page or documents that you are viewing in Safari, tap on this bookmark; Notebooks will launch and grab the page. This works well for images, HTML, PDF and other documents that are currently displayed in Safari. However, it may happen that HTML documents look slightly different in Notebooks and that inline images do not appear; this is because Notebooks does not import embedded images or elements. In such cases you might try to select and copy the contents of the page in Safari and save it as web archive using "New from Pasteboard" in Notebooks.

# IMPORT AND EXPORT THROUGH ITUNES FILE SHARING

iTunes offers an option to exchange documents with apps installed on your iPhone or iPad via WiFi or USB cable.

To import documents from iTunes, select your iPhone/iPad in iTunes' Device section, then select Apps, and in the File Sharing area at the bottom of the screen click on Notebooks. The window on the right, titled Notebooks Documents, allows you to add new files to Notebooks.

The limitation is that iTunes does not import folders, but there is a workaround: Notebooks is able to extract zip archives, so you can create archives of files and folders on your computer (on a Mac, select the Finder's Compress method) and add those archives through iTunes.

When the transfer is finished, open Notebooks and navigate to the top level. Notebooks detects the documents you imported and adds them to its list.

To export books or documents to iTunes, select Export to iTunes from a book's context menu or from a document's action menu (you may first need to enable iTunes Export in Notebooks' *Import, Export, Sync* settings). This puts a copy of the book or document into an Export folder outside of Notebooks' visible hierarchy, which is accessible through iTunes's File Sharing.

In iTunes, select this folder and save it to your computer. You can then delete this folder through iTunes. You cannot open that folder and view its contents in iTunes directly.

> When you try to save the contents of Notebooks to your computer it may happen that iTunes stops and reports that a certain file cannot be found. This usually means that the titles of some of your books or notes contain characters that are "illegal" on Windows environments ( < > : \" / \ | ? * ). After correcting those titles the export should work fine.

# ADD DOCUMENTS FROM THE PASTEBOARD (CLIPBOARD)

Whenever you use the Copy command, the iPhone or iPad puts the currently selected text, formatted text, image, web site (or what ever you selected) onto its Pasteboard. It does that in a very intelligent way and saves the selection in multiple qualities. If you have highlighted and copied a portion of a web page, for example, the pasteboard will save the plain text and a web archive representation with all images and formatting intact.

In its Add (+) menu, Notebooks' provides an option New from Pasteboard. Selecting it saves the pasteboard's current contents as a new document. Notebooks takes the best quality available. So in the example above, Notebooks would take the web archive and store it as a new document, because it contains the web page exactly as shown in Safari. If you prefer the plain text version, all you need to do is open a new note and paste directly into the note. In this context, Notebooks will insert the plain text version.
If the Pasteboard contains a URL to a website, Notebooks offers two options:

1. Save the URL as bookmark. In this case, Notebooks saves the address of the website as a new object in the current book, but not the page itself. Selecting the bookmark in Notebooks will load and display the website. This option is also available for links to books and documents in Notebooks

2. Import website, on the other hand, imports and saves the contents of the website. This is the preferred option if you want to archive the contents of a website in Notebooks and read it later, even when you are offline.

> The terms *pasteboard* and *clipboard* refer to exactly the same thing, but in iOS terminology, *pasteboard* is used more frequently.

# WIFI SHARING - USE NOTEBOOKS AS A HARD DRIVE

With WiFi sharing, Notebooks turns into kind of a hard drive (a WebDAV server, to be exact) that can be accessed from any computer on the same network. This is probably the easiest and most efficient way of getting documents into and out of Notebooks.

Sharing allows you to drag & drop documents between your computer and Notebooks, open documents from and save them to Notebooks (on a Mac) and synchronize Notebooks between different devices (iPhone and iPad, for example).

To use WiFi sharing, you need a wireless network connection between your iPhone/iPad and your computer and a WebDAV compliant operating system like macOS, Windows XP, Windows Vista (Windows 7 currently refuses connections to Notebooks) or a WebDAV client like Cyberduck, Transmit, NetDrive and others.

To start sharing, please follow these steps

- Make sure that your iPhone, iPod touch or iPad has an active WiFi connection to the same network your computer is connected to.
- Make sure you have enabled *WiFi Sharing* in Notebooks' settings.
- Open the book that you want to share.
- Select *Share This Book* from the action menu (in case you have several sync options enabled, select *Sync…* first, then *Share This Book*).

- Unless already done, Notebooks will ask you to set a username and password of your choice; you will have to enter these when making a connection from your computer.

- Notebooks now displays a page with all details you need to connect.

- Using the Mac OS Finder's "Connect to Server", Windows' "Network Drive" or your favorite WebDAV client like Cyberduck, Transmit, NetDrive etc. connect to Notebooks.

- You can now access Notebooks' documents as if they were on a folder on your hard drive. Depending on the type of client you are using, you can also up- and download folder structures and open/edit documents by double-clicking on them.

## Connect from a Mac

To connect from a Mac, select "Go > Connect to Server" from the Finder menu, enter one of the addresses offered by Notebooks, click "Connect" and enter username and password (you set them in one of the steps above). A Finder window will then display the contents of the shared book.

## Connect from a PC

To connect from a PC, you need to create a *Network Drive*:

- From the Start menu, right-click Computer and select *Map Network Drive...*

- In the *Map Network Drive* window, click *Connect to a Web* site that you can use to store your documents and pictures, and then click Next.

- Click *Choose a custom network location*, and then click *Next*.

- In the *Internet or network address* field, enter a URL that is given on Notebooks' Sharing window and then click *Next*.

- When prompted, enter the username and password that you have defined in the "WiFi Sharing Setup".

- Some version of Windows, and especially Windows 7, are known to have problems connecting to WebDAV servers. Alternatively, you can use the

free application NetDrive, which can be downloaded from www.net-drive.net. When setting up the connection to Notebooks, please make sure to select WebDAV as connection type, and enter the port number (8080) into the provided field instead of the server field.

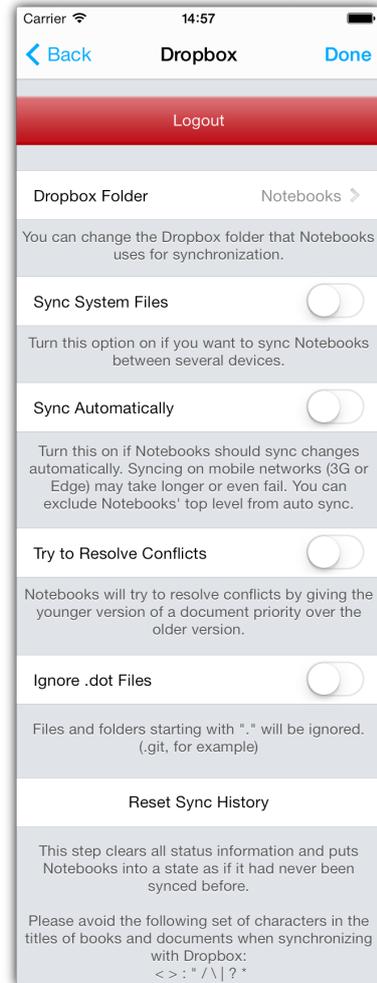When the connection is established, you should be able to drag and drop files and folders between your computer and the Notebooks. To open a folder, right-click it and choose Explore or Open. To delete an item, right-click it and select Delete.

If you have difficulty dragging and dropping, right-click the file or folder you want to copy, and choose Copy. Then right-click the directory you want to put it in, and choose Paste.

# SYNCHRONIZE WITH DROPBOX

Dropbox is a *cloud service* (i.e. an internet based file hosting and sharing service) which allows users to store files and folders on the Internet. What is special about Dropbox is its ability to synchronize documents across multiple computers and devices, and it does so in a very clever way: when you add or change a document in the *Dropbox* folder on your computer, the changes will immediately be synchronized with the server on the Internet. Similarly, when changes are made on the server, they are immediately synchronized to your computer. This happens almost instantly, within just a couple of moments.

Notebooks can synchronize its contents with a folder on Dropbox; let us call this folder *sync folder*. If you have installed the free Dropbox desktop application on your computer, this *sync folder* on Dropbox and its contents is synced with your computer, too. This establishes a direct connection between Notebooks and your computer and allows you to add, edit and change the same set of documents on both devices (or on all devices that are synchronized with the same Dropbox *sync folder*).

> Once set up, Notebooks' Dropbox sync can take place in the background and hardly requires your attention any more. Setting up Dropbox sync is straight forward, but for those who want to know more, this chapter contains some background info.

# Terminology

### Sync

Shorthand for synchronization

### Pull-to-sync

Triggering a sync by pulling the list of books and document all the way down. This is the same gesture you use in Mail when checking for new messages.

### Full Sync

A sync triggered from the action menu. It synchronizes the current book and all of its contents by walking through the hierarchy in Notebooks and on Dropbox looking for any changes to be synched. This is a thorough and deep sync.

### Delta sync

Delta sync synchronizes all changes in Notebooks and on Dropbox since the latest delta sync.

Notebooks and Dropbox both keep track of which documents have changed, and only these changes are synchronized during delta sync. There is no need to walk through any hierarchies. That is why delta sync is much faster than a full sync and allows the user to continue to work without interruption.

This is Notebooks' automatic sync, but it can also be triggered with the *pull-to-sync* gesture.

### Manual Sync

A sync triggered by the user. It can be a full sync triggered from the action menu, or a delta sync triggered with the *pull-to-sync* gesture.

### Automatic Sync

Notebooks syncs its contents automatically and without user interaction. When activated, automatic sync takes place after each modification and also at regular intervals. It even takes place while Notebooks is in the background when *background sync* is

turned on in iOS settings.

## Set up Notebooks to sync with Dropbox

Setting up Dropbox synchronization in Notebooks takes just a few moments:

- In Notebooks' *Settings > Sync > Dropbox* turn on Dropbox Sync
- Open *Dropbox Settings* and log in to Dropbox; you may be temporarily transferred to the Dropbox application if you have that installed. This is for safety reasons and to make sure that Notebooks never gets your username and password.
  If you do not yet have a Dropbox account, you can use this referral link, which will give you extra 500MB of free space.
- By default, Notebooks uses the folder *Notebooks* at the top level of your Dropbox to store its books and documents, but you can select any other folder on Dropbox as well.

With these few steps you are ready to start syncing Notebooks with Dropbox. For *automatic sync*, please read on.

## Manual Synchronization

After activating Dropbox sync, the action menu of each book shows a new option Sync - Dropbox. Select it to sync the contents of the current book - its documents and all of its sub books - with the corresponding folder on Dropbox (by default, it is the folder *Notebooks* at the root level of your Dropbox account).

If you have the *Dropbox application* installed on your computer, the files uploaded by Notebooks will appear in your local Dropbox folder a few seconds later. You can make additions and changes to the documents in your computer's Dropbox folder, and these modifications will be synced to Dropbox and on to Notebooks on your other devices.

> Manual synchronization is deep and syncs the current book and all of its sub books.

## Automatic Synchronization with Delta Sync

To make synchronization more comfortable, Notebooks can automatically connect to Dropbox at regular intervals, detect changes and initiate a sync when necessary. We call this sync method delta sync.
Automatic synchronization is made active by turning on the corresponding switch in Notebooks' Dropbox settings.

To initialize delta sync, perform a manual sync from Notebooks' top level first. When finished, delta sync is set up.

With automatic sync turned on, Notebooks checks Dropbox every time you open or close it, and every 60 seconds as long as Notebooks is running.

If you have been using Dropbox sync in earlier versions of Notebooks, there are a few changes you should be aware of:

- With delta sync t is no longer necessary to open a book to trigger automatic sync.
- The *pull-to-sync* gesture now triggers a delta sync, not a shallow sync of the current book as before.
- Books and documents can now be excluded from sync by setting a switch in the item's info. These items are never synchronized, not even during manual sync.
- Please note the changes regarding protected items.

## Background Refresh

While you are working in another app or not using the device at all, iOS wakes up Notebooks at irregular intervals, allows it to perform a delta sync and import any changes you may have made on other devices in the meantime. So

as you are working in Notebooks on your Mac, for example, Notebooks on your iPad silently imports your changes and updates its contents. When you then open Notebooks on your iPad, your changes are already there.

It is important to know that iOS controls when and how often it wakes up Notebooks, and it does so based on your usage pattern. So the more often you use Notebooks, the more often it is allowed to refresh in the background.

> *Background refresh* is intended to quickly update an app's content and allows an app to run for 30 seconds. Depending on the number and size of documents that need to be synced, Notebooks may exceed this limit and get terminated by iOS.
> So when you know that Notebooks needs to import a large number of documents, it is better to keep Notebooks open and wait until synchronization has finished.

If you want to ensure that Notebooks is in sync because you are about to leave for a meeting, for example, just open Notebooks with auto sync enabled and it will immediately perform a delta sync (provided you have online access). A few moments later its contents is up to date and you can leave.

## Activate background refresh

To take advantage of background refresh, please make sure that

1. *Automatic Synchronization* is turned in in Notebooks' Dropbox settings
2. *Background App Refresh* is enabled for your device and for Notebooks in iOS settings.

If you have set your device to lock down after a certain amount of time (or immediately, as is the case when using Touch-ID), please note that the lock down activates data protection and makes it impossible for apps to read or write any files. Consequently, Notebooks is unable to perform a background refresh while the device is locked.

## Trigger Delta Sync Manually

If you prefer to stay in control and decide when Notebooks should sync your documents, you can turn off automatic sync and use the pull-to-sync gesture in any book to trigger a delta sync. Delta sync needs to be initialized, though.

## Change the Dropbox Sync Folder

By default, Notebooks creates and uses the folder *Notebooks* at the top level of your Dropbox. All the books and documents you sync will be exported to this folder and stored in the same hierarchy you set up in Notebooks. If you want Notebooks to use a different folder, just select an alternative Dropbox folder.

If you are already syncing Notebooks with Dropbox and want to change the sync folder, please be aware that changing that folder resets Notebooks sync history. This means that after the change, Notebooks is in a state as if it had never been synced before. Therefore, we recommend to make a full sync before changing the sync folder.

## Sync System Files (.plist)

If you use Notebooks on several devices and wish to keep the contents synchronized, you can do so by setting up Dropbox sync on each device (you find more details about synchronizing several installations of Notebooks in an extra

section below).

To make sure that Notebooks also synchronizes extra information that is not stored within the documents themselves (font and color settings, context tags etc), you should activate Sync System Files in Notebooks' Dropbox settings.

System files carry the same name as the document they belong to, but they have the extension plist. You do not need to care about these files in Dropbox, and you should not try to edit or change them.

If you do not intend to synchronize the contents of Notebooks between several devices, you can leave this switch off. In that case, Notebooks still synchronizes *essential* system files, like a task list's details or a books' properties.

## Reset Delta Cursor

The delta cursor is a pointer that helps Notebooks quickly identify what has changed on Dropbox since the latest delta sync. In some rare cases you may want to reset this cursor, but a reset is also deactivates delta sync. To reactivate delta sync, you need to initialize it again by performing a full sync from Notebooks' top level.

## Reset Sync History

To decide what has been moved, deleted, added or modified on Dropbox since the latest sync, Notebooks maintains status information about each of its documents. Based on this info Notebooks knows which documents were successfully synced at what time, and if one of these documents is no longer visible on Dropbox, Notebooks knows it was deleted.

Sometimes it may be necessary or desirable to delete all this information and start from scratch. To do so, select Reset Sync History, and Notebooks assumes that none of its documents has ever been synced.

During the first sync after resetting the history, documents that exist in Notebooks and on Dropbox will produce a sync conflict, which you can safely ignore.

## Handling Sync Conflicts

When Notebooks detects documents that have been modified in both locations since the last successful synchronization, it leaves them unchanged and instead reports a Sync Conflict. At the end of a sync process, Notebooks writes a *Sync Report* with a list of all affected documents and a description of the conflict.

To solve the conflicts, go through the list and decide for each entry which version of a document is current and which is outdated. You could then delete the outdated version or modify the current version. If you do nothing, Notebooks will ignore the conflicting documents during successive synchronizations until one of the two versions is modified.

There may be cases when conflicts are reported, but they do not make sense to you, for example because you know that you have not made any changes on the server. This could happen when a synchronization concludes with an error message, which does not count as successful synchronizations; the documents that have been transferred before the termination will then report conflicts during the next sync. You can safely ignore and delete the sync report in these situations.

> ### How does Notebooks discover Conflicts?
>
> When Notebooks detects that a document has been modified locally and on Dropbox after the latest synchronization, it goes ahead and compares the contents of the versions in Notebooks and on Dropbox. When the comparison results in a mismatch, Notebooks reports a conflict; when the contents of the version is identical, Notebooks considers the document *synced*.

## Resolve Conflicts Automatically

Notebooks can try to resolve those conflicts automatically by giving the younger version of a document precedence over the older. If you accept this strategy, turn on Try to resolve conflicts and Notebooks will do its best to resolve them for you.

## Dropbox Sync and Protected Items

Notebooks' protected items are not encrypted, so when you sync them to Dropbox, these items are unprotected and readable. To avoid export by accident, Notebooks does not export protected documents when it is locked. When unlocked, Notebooks exports protected items like all other documents.

When changed on Dropbox, Notebooks imports protected items even if it is locked. Also, when a protected document is deleted from Dropbox, it will be deleted from Notebooks when it is locked.

We think that importing protected items does not bear any security risk, while exporting them by accident may. This strategy also allows Notebooks to import protected items during background refresh.

> If you do not want any protected items to be synced to Dropbox, it is best to put them into a book which is set not to sync with Dropbox.

## Windows Incompatible Characters

As mentioned in other sections, there is a set of characters that should be avoided in the titles of documents. This is especially important when syncing to Dropbox. The illegal characters are < > : \" / \ | ? * .
You can read more about this on the Dropbox website

## Dropbox Error 500

During synchronization, especially when importing larger numbers of documents, you may encounter this error message. This is a so called *Dropbox internal error* which never compromises your documents. The reason for this probably is the number of rapid requests to Dropbox, although we don't have any confirmation for that.
If you are about to manually sync the whole contents of Notebooks, you might consider syncing each top level book separately until you know that all docu-

ments have been imported. Then you can sync again from the top level (no import and export should necessary) just to make sure that automatic sync has been correctly initialized.

## Monitor the Progress of Dropbox Sync

In some cases it may be interesting to see when Dropbox sync takes place and which documents are being synced. Notebooks provides a convenient monitoring mechanism which can be activated like this:

- At the top level of Notebooks, create a plain text note with title *Dropbox Log*.
- Close Notebooks and open it again.

Notebooks now writes a log of which documents are imported or exported, when automatic background sync has taken place etc, in that document. The format is easily readable and should give you an idea of what is happening. We can also use this log for trouble shooting purposes.

To turn off logging, just delete the *Dropbox Log*.

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# SYNCHRONIZE WITH WEBDAV SERVERS

A WebDAV server basically is a web server that can be mounted on your computer just like a folder or drive. Perfectly integrated into your Windows file-system or your Mac Finder, it provides a convenient way of storing your documents off-site.

Without extra software or changing your firewall, you can open documents from and save them to that WebDAV server just as you would on your local disk. Notebooks can read from and write to the same directory and uses this capability for synchronization.

Examples of WebDAV enabled services are my-Drive, SwissDisk, GMX Mediacenter, 1&1 Smart-drive, fastmail.fm, interWaysMAIL and many more. Some of them offer free accounts with storage of 2GB or more. Of course you may set up and use your own WebDAV server, too.
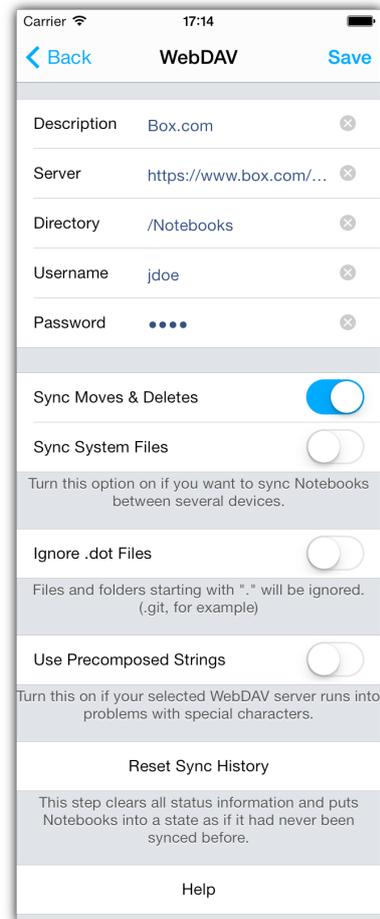
## Set Up WebDAV Sync in Notebooks

To start using WebDAV synchronization, first turn on WebDAV Sync in Notebooks' settings and then open the WebDAV Settings. This is where you set the details for the server and your login information. These details usually are available from the providers' websites, but you find a selection of services at the end of this section.

- Choose a description for your service
- Enter the server address as given by your service provider (please refer to their websites)
- Optionally, set a start directory on the server that Notebooks should use. The default is the root directory, but if a start directory is given, please make sure it is created on the server before you start to sync.
- Enter your username and password

When the setup is complete, a new option "Sync - Your Service" is available from each book's action menu. Select that option to sync the contents of the current book with the corresponding folder on the server.

## Sync Moves and Deletes

By default, synchronization with a WebDAV server ignores that documents may be moved, renamed or deleted in Notebooks or on the server. To change the strategy, turn on the switch Sync Moves and Deletes, and all objects are

moved or deleted in one place will be moved and deleted in the other place, too. Please, use this option with care.

## Sync System Files

If you use Notebooks on several devices and wish to keep the contents synchronized, you can do so by setting up synchronization with the same WebDAV server on each device (you find more details about synchronizing several installations of Notebooks in an extra section below).
To make sure that Notebooks also synchronizes extra information that is not stored within the documents themselves (font and color settings, context tags etc), you should turn on Sync System Files in Notebooks' WebDAV settings.
System files carry the same name as the document they belong to, but they have the extension plist. You do not need to care about these files on the server, and you should not try to edit or change them.
If you do not intend to synchronize the contents of Notebooks between several devices, you can leave this switch off. In that case, Notebooks still synchronizes *essential* system files, like a task list's details or a books' properties.

## When Sync Fails because of Special Characters (Umlauts)

It may happen that your selected WebDAV server suddenly terminates a sync with an error message, although it has flawlessly worked before. In this case it is worth checking out if you have any documents with umlauts in their titles. If you do, you should try and turn on the switch Use Precomposed Strings in Notebooks' WebDAV settings. Notebooks then uses a different encoding for the file names, which the server should be able to accept.

## Reset Sync History

Between two runs of synchronization, Notebooks keeps a series of status information that enables it to decide which documents have been moved, deleted, added or modified. Among these infos are the date of the last successful sync, but also the contents of the server as it was seen during the last

sync.

Sometimes it may be necessary (or desirable) to delete all this information and start from scratch. To do so, select Reset Sync History.

During the first sync after resetting the history, documents that exist in Notebooks and on the WebDAV server will produce a sync conflict, which you can safely ignore.

## Handling Sync Conflicts

When Notebooks detects documents that have been modified in both locations since the last successful synchronization, it leaves them unchanged and instead reports a Sync Conflict. At the end of a sync process, Notebooks writes a Sync Report with a list of all affected documents and an explanation of the reason for the conflict.

To solve the conflicts, go through the list and decide for each entry which version of a document is current and which is outdated. You could then delete the outdated version or modify the current version. If you do nothing, Notebooks will ignore the conflicting documents during successive synchronizations until one of these versions is modified.

There may be cases when conflicts are reported, but they do not make sense to you, for example because you know that you have not made any changes on the server. This could happen when a synchronization concludes with an error message, which does not count as successful synchronizations; the documents that have been transferred before the termination will then report conflicts during the next sync. You can safely ignore and delete the sync report in these situations.

## Remarks

- Please do not use WebDAV Sync as your only backup solution for Notebooks and make regular backups through iTunes as well.

- If you find that your WebDAV service does not integrate with Notebooks, please let us know.

- Large files like PDF documents take longer to transfer than text

documents.

- We do not control the type of documents you sync via WebDAV, so you can import "unsupported" formats. Notebooks will try to display any file, but you will receive an warning when it is unable to.

## Supported WebDAV Servers

Although standards and rules have been defined for the communication with WebDAV servers, many providers have implemented their own flavor. So it is very well possible that you find WebDAV servers that are not supported by Notebooks. A list of supported servers is available on our website.

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# SYNCHRONIZE NOTEBOOKS BETWEEN MULTIPLE DEVICES

If you use Notebooks on multiple devices you probably want to sync your books and documents between them. Notebooks provides several options.

## Sync with Dropbox

This is one of the simplest and most comfortable options currently available. Set up Dropbox sync in Notebooks on all devices, turn on Sync System Files and activate Automatic Sync if you want. All your versions of Notebooks now synchronize with the same Dropbox directory, which acts as the central hub that receives changes and additions from each device and passes them on to the others.

> An extra advantage of Dropbox it that it keeps a history of all changes for at least 30 days. Should something ever go wrong, it is easy to revert a change or retrieve a deleted book or document.

## Sync with a WebDAV Service

The logic is the same as with Dropbox, with the exception that automatic sync is not available. So you need to manually trigger synchronization to ensure that all changes you make on one device are stored on the central WebDAV server.

## Sync Directly Between two iOS Devices

This is a viable option if you want to sync two devices without using a cloud service. Through its WiFi Sharing, Notebooks has a built in WebDAV server which can be considered your *private WebDAV server*. Basically, you start WiFi sharing on one device and set it as target for WebDAV synchronization on the other.

Here is a step by step guide: (to better identify which device we are referring to, we assume you are syncing between an iPad and an iPhone; but this is just an example)

On the iPad

- Make sure that both devices are connected to the same wireless network.
- In Notebooks, enable "WiFi Sharing" in settings and set up a WiFi user.
- At the top level book, select "Share This Book" from the action menu.
- In the view that appears, turn on the switch "Show System Files" to make sure that all task data and details are visible.

On the iPhone

- In Notebooks, change the WebDAV settings to the details given on the

iPad's Sharing info. Clear the Directory field and enter the username and password you have defined for WiFi Sharing on your iPad (see step 2 above)

- Move to the book that you would like to synchronize and select Sync from the action menu.

- This will synchronize your books, notes, tasks and documents between iPhone to your iPad.

If you use this procedure regularly, it is best to always sync in the same direction.

## Sync Directly Between Notebooks for Mac and Notebooks on iOS Devices

If you want to sync Notebooks between your iPad and Mac without going through an external service like Dropbox, the best option is to use the Web-DAV server that integrated in Notebooks for Mac.

In Notebooks for Mac

- Open *Preferences > Notebooks Server* and start the server; a WebDAV server is now running on your Mac. When you are to allow incoming traffic for Notebooks you should agree.
  With the server running, Notebooks displays all the details necessary to connect from Notebooks on iOS.

In Notebooks on your iPad or iPhone

- Open *Settings > Sync* and activate *WebDAV*; then open the *WebDAV settings* and enter the details presented in Notebooks for Mac. You can leave the *start directory* empty, but you might consider activating *Sync Moves and Deletes* and *Sync System Files*.

- Now open a book's action menu to find *Sync <name of your server>*, which allows you to trigger a sync of the current book and its contents with Notebooks on your Mac – provided Notebooks/Mac is running and your devices are connected to the same wireless network.

# IMPORT NOTES FROM THE IPHONE/IPAD NOTES APP

On the iPhone, iPad and iPod touch there is no way to directly import notes that you have already created in the native Notes application. With a few steps, however, you can quickly and easily transfer them into Notebooks:

- Back up your iPhone, iPad or iPod touch through iTunes
- Download any of the backup extractors:
    - http://supercrazyawesome.com
    - http://www.iphonebackupextractor.com
    - http://www.icopybot.com/itunes-backup-manager.htm
- Launch the extractor and select *Read Backups*
- Choose the latest backup
- Next you are presented a list of apps; choose *iPhone OS Files* and click *Extract*
- Select a location to store the extracted files

The extraction process generates a folder "iPhone OS Files" in your chosen location. In that folder, open the sub folders *Library > Notes* and import the file notes.sqlite (on earlier devices it may be titled notes.db) into Notebooks with any of the available import/sync options.

Notebooks displays the document notes.sqlite with a generic icon. Tap it it the list of books and documents, and Notebooks extracts the notes into a new book called iPhone Notes.

# IMPORT PALM® MEMOS

To support the switch from Palm to iPhone/iPad, Notebooks has implemented a mechanism to import and extract memos that are exported from Palm Desktop. The process is slightly different for Windows and Mac users.

## Windows Users

- In Palm Desktop, select the module "Memo"
- Select all memos
- From the "File" menu, select "Export…"
    - Choose a location and a file name and use .palm as file extension
    - As "Export Type" select "Tab Separated Values"
    - Click "Export"
    - If prompted, check "Memo", "Category" and "Private"
    - after export, change the file extension to .palm
- Import the .palm file into Notebooks, for example by
    - dropping the file into a shared book (see WiFi Sharing)
    - putting the file into your Dropbox folder and synchronize
    - putting the file on a WebDAV server and synchronize
    - using any of the options described in the import section or in the handbook

Notebooks will show the .palm file with a generic icon. When you open it by tapping on its name, Notebooks will extract the memos into a book with the same title as your .palm file. The memos will be sorted into sub-books with names corresponding to your categories. Private memos will be protected in Notebooks, if protection is enabled. The original file will be deleted after successful extraction.

In case the file is imported but not extracted, please open the .palm file in a

text editor (WordPad, for example) and save it with Unicode (UTF) text encoding.

## Mac Users

For Mac users the process is less straight forward, but the result is even more rewarding. You first export the memos from Palm Desktop, modify their formatting in Text Edit and import them into Notebooks.

- In Palm Desktop, view all memos
- From the Categories column, select one category
- From the "File" menu, choose "Export…" and
  - For Module set to Memos
  - For Items, set to the subset of Memos (it defaults to all the memos not just the ones in the particular category selected in step 1b)
  - For Format, set to Tab & Return
  - Choose a filename, destination, and manually add the file extension .palm
  - Click on Export

Open the exported file in Text Edit.

- From File, choose "Open…" and select the file that was created by the Palm export.
- In the document, select one of the bold paragraph marks (¶) and from Edit, choose Copy. Depending on your text encoding, this mark may also look like this: ¦
- From Edit, choose "Find…" and in the window that appears
  - Paste the paragraph mark you copied into the "Find" space
  - Type the | (pipe) character in the "Replace with" space
  - Click on Replace All
- Save the file (overwriting/replacing the prior version)
  (If your text contains special characters you should save the file with Unicode text encoding)

- Make sure the file's extension is .palm

Import the .palm file into Notebooks, for example by

- dropping the file into a shared book (see WiFi Sharing)
- putting the file into your Dropbox folder and synchronize
- putting the file on a WebDAV server and synchronize
- using any of the options described in the import section or in the handbook

After import, the file will be displayed with a generic icon. When you open it by tapping on its name, Notebooks extracts the memos and produces

- a book with the title of your imported text file
- a sub-book for each category
- a separate note for each memo, filed according to its category
- the original modification date will be preserved if possible
- memos that were tagged "Private" will be protected, thus they will only appear if you unlock Notebooks.

In case the file is imported but not extracted, please open the .palm file in a text editor (TextEdit, for example) and save it with Unicode (UTF) text encoding.

*To guarantee that the memos' modification date is correctly set, please make sure that your iPhone's/iPad's date format (region format) matches the format of the exported memos..*
(Example: the date in your exported memos looks like "August 18, 2011"; go to Settings -> International and check that the Region Format Example that appears on that page displays the date like "Tuesday, August 18, 2011". If it does not match, please select a different region format that matches)

# 10. Settings

Notebooks provides numerous settings to personalize aspects of its appearance and functionality. Settings are reachable by tapping the cogwheel button in any book's bottom left corner.
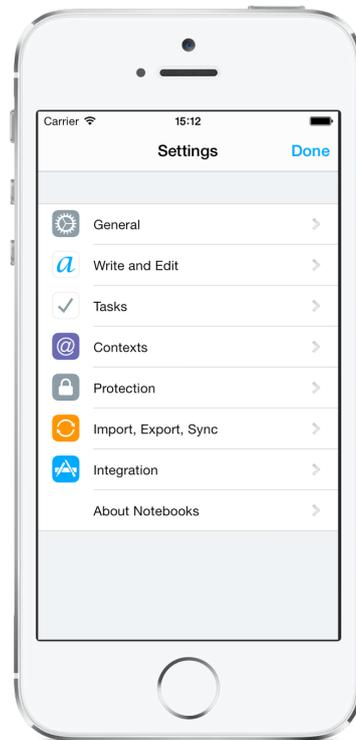
## GENERAL

### Use Column View (iPad only)

Select the basic layout of Notebooks: Column view (like in Mail) or Full Screen view (like an XL version of "Notebooks for iPhone")

### Hide Document when moving to a different Book (iPad only)

When using Notebooks in column mode, the currently displayed document by default remains visible in the right window even if you navigate to a different book in the left column. When this switch is on, the document disappears when you navigate away from its parent book.

### Show Documents above Books

By default. Notebooks always shows the lists books above the list of documents. With this switch you can change the sequence and tell Notebooks to

show the documents above the books.

## Show Document Icons

Notebooks usually displays an icon along with each book or document, which should make it easy to immediately recognize an items type. If you do not need or want the icons (and save some space), you can tell Notebooks not to display them.

## Show Filename Extensions

With this setting turned on, Notebooks appends the filename extension to the title of each document. So instead of "About Notebooks" it would show "About Notebooks.txt".

## Show Creation/Modification Dates for Documents in Preview

When you sort a book by creation or modification date, this setting tells Notebooks to display the document's date in the first line of the preview area (preview needs to be at least one line).

## Dark Theme

Select the dark interface style, which can be convenient when using Notebooks in a dark environment. The document's background color remains unchanged.

## Dark Theme for Documents

When you turn this setting on, documents will be displayed on a dark background with light font color. This does not change a document's properties, it just influences the way documents are presented with the *Dark Theme* is active.

## Recent Items

Enable (or disable) the smart book recent items and set the number of items to show.

## Show Recent Items in "Go to…" Menu

When on, the list of recent items is available from the jump menu as well. This provides a convenient way of quickly switching between documents that may reside in different books. In a way, this is comparable to a browser's history.

## Send HTML as Attachment

When this switch in on, Notebooks attaches formatted documents to the email message instead of inserting their text inline.

## Send Text as Attachment

Same as above, but for plain text documents.

## "Add" creates new note…

When briefly tapping the "+" button in a book, it by default displays a menu of options. When tapped and held, it immediately creates a new document (plain text or rich text). - This switch reverses the function.

## Custom Sort: Put new documents at top

With custom sort order selected, new documents which have not yet been explicitly positioned in the list, appear at the bottom by default. If you prefer to have them added at the top of the list, turn this option on.

## Treeview for "Move" & "Go to…"

When selecting Move or Jump, Notebooks shows one single list of all available books by default. For very long lists of nested books, this may be difficult to navigate. This option lets you switch to a collapsible tree view, which allows you to open and close books and keeps the list more manageable.

## Lock Current Orientation (iPhone only)

Locks Notebooks' layout to the current orientation; Notebooks no longer follow the iPhone's rotation.

## Disable the device's auto lock

With this switch you can prevent your device from falling asleep and activating auto lock while Notebooks is opened. When you leave Notebooks, auto lock is enabled again. (Please be aware that this drains the device's battery more quickly, and everyone can access and use your iPad)

# WRITE AND EDIT

## Default Document Type

The "+" button in the top right corner of a *document* by default shows a menu and lets you decide between a new plain text note, a formatted document and a Markdown document. The option *Default Document Type* allows you to set which default type Notebooks should create when tapping the + button.

## Document Style

The appearance of a formatted and Markdown document is defined in a so

called style sheet (css, to be precise). The style sheet defines the line spacing, size and weight of heading, subheading and other paragraph styles, sets hyphenation and more. In this section you set the global style sheet which is applied when no other style is defined, and you can add your own css style sheets. *The individual settings for books and documents override this default.*

## Default Font

Set the default font and font size to be used for documents throughout Notebooks. *The individual settings for books and documents override this default.*

## Hyphenation

Enable or disable text hyphenation across all documents. By default, hyphenation is turned off. *The individual settings for books and documents override this default.*

## Text Alignment

Choose if text should be left aligned, right aligned or justified. By default, text is right aligned for right-to-left languages, left aligned for all other languages. *The individual settings for books and documents override this default.*

## Line Spacing

Set the default line spacing for plain text documents. The higher the value the wider the space between lines. *The individual settings for books and documents override this default.*

## Use default font for Lists

This options tells Notebooks to use the *Default Font* (see above) for the lists of books and documents, too.

## Paper Type & Colors

When on, you can define the default background and font colors for documents in Notebooks. In addition to the preinstalled patterns you can add and select your own background image or background pattern from your albums. When off, Notebooks uses it default patterns and colors. (Formatted documents do not use no background patterns.) *The individual settings for books and documents override this default.*

## Switch to Fullscreen for Writing

You can always tap a document with two fingers to switch to fullscreen layout, but this is a convenience option that automatically switches to fullscreen when you start editing a document. When you hide the keyboard (or swipe across the text to stop editing), Notebooks switches back to normal layout.

## Reduce paper size in Landscape (iPad only)

By default, all documents use the iPad's full width. While this is appropriate in portrait mode, it may be inconvenient in landscape mode. With this option *on*, Notebooks no longer uses the whole screen to display editable documents in landscape orientation, but instead shows them centered and at same the width as in portrait orientation.

## Pinch & Zoom to Resize Plain Text

Plain text allows you to change the text size with pinch and zoom gestures. If you do not want this behavior, you can switch it off with this setting.

## Show Extra Keyboard Keys

Notebooks adds an extra row of keys to the top of the built in keyboard and provides quick and convenient access to characters which are hard to reach otherwise or which do not exist at all (TAB or cursor keys, for example). If you

do not need or want these keys, turn them off here. - More info about the extra keys is available in a separate chapter.

## Select Keys

The row of extra keys contains a default set of keys which we think are convenient. We know that this selection may not be ideal for everyone, so you are free to define your own set of keys.
To set a key, just tap it in this section and type the character (of phrase, if you wish) to assign it to the key.

## Extra Keys for Formatted Documents

When on, the selected extra keys appear for formatted documents, too.

## Auto detect Lists in Plain Text

When you start a line with a character from a defined set, Notebooks assumes that you are about to create a list and adds that same character at the beginning of the next line. If you do not want this automatic behavior, you can turn it off here.

## Use Tab instead of spaces to indent Lists

When indenting lists in plain text, Notebooks by default adds four spaces. Should you prefer a tab character to spaces, you can set that here.

## Align Lists in Plain Text

With this setting turned on, plain text lists are indented and left aligned along the first character following the list marker. This much enhances the readability of lists (and indented lists) in plain text.
(Lists in formatted documents are always indented and aligned.)

# Markdown

## Highlight Markdown Syntax

Notebooks can specifically highlight and format Markdown commands in plain text; this supports and enhances viewing and editing Markdown documents.

## Highlight while typing

Highlighting is applied to the text while you are typing. Depending on the size and complexity of the document, the process of highlighting may require a few fractions of a second, which can lead to a noticeable delay on slower devices. Notebooks tries to detect appropriate breaks during your typing and uses these to update the styles.

## Apply to all plain text documents

Turn this option on to activate Markdown highlighting for all types of plain text, not just .md documents.

## Show Markdown as extra document type (.md)

When creating a new document, Notebooks by default shows the options *plain text note* and *formatted document*, because they are the most popular ones. If you know and like Markdown, you can add *Markdown* to this selection, which then creates a new .md document; these Markdown documents are displayed as formatted document, edited as plain Markdown, and their icon has a yellow background and is labeled with *MD*.

## Show Markdown documents as plain text

When this option is turned on, Notebooks opens .md documents like plain text documents. When off (which is the default), Notebooks opens the formatted representation of these documents and you need to tap them once to switch to the plain text version.

### Auto detect Markdown in .txt and convert to .md

When on, Notebooks tries to detect the presence of Markdown characters and commands in plain text, and automatically converts the document to .md.

### Convert to *Combined Markdown* (.html)

*Combined Markdown documents* are a remainder of early Notebooks versions, still appreciated by many users. This is why they are still supported in Notebooks, although the format itself is non standard. - Basically, these documents are Markdown text, but Notebooks saves them as converted HTML documents and adds the plain Markdown text as a comment in the HTML code. This makes these documents appear as HTML, but in Notebooks they are editable as plain text. Their icon has a white background and is labeled *MD.*
With this option, support for combined Markdown can be disabled, and the automatic conversion creates regular Markdown (.md) documents instead of HTML.

### Convert existing *Combined Markdown* to .md

If you have combined Markdown documents in Notebooks but want to switch to plain Markdown (in other words you want to use .md instead of .html), you do not need to manually convert the existing documents. When you turn on this option, the combined Markdown document will be converted to plain Markdown the next time you edit and save it.

### Make every newline a line break

The Markdown standard states that in order to create a line break, you either need to add one or more blank lines, or add two spaces at the end of a line. Notebooks tries to make this more convenient and always appends two spaces at the end of each line during Markdown conversion. So you do not need to take care of this rule. However, this is non standard, and the result may be unexpected for Markdown experts. By turning this switch off you tell Notebooks to adhere to the standard.

### Use _ for emphasis

In Markdown, both "_" and "*" can be used to indicate emphasis like bold or italic. Notebooks by default inserts "*" when you use the B or I extra keyboard keys, but with this switch you can tell Notebooks to use "_" instead.

### Treat lines starting with // as comments

This allows you to insert notes or comments in your text, which are ignored for word count and during Markdown conversion.

### Use typographic quotes and dashes (SmartyPants)

By default, Notebooks uses typographic characters when converting from plain text to HTLM. Thus (c) becomes ©, single and double quotes are replaced with their opening and closing representation and so on. If you do not want this type of replacement, you can turn it off here.

## Show Infobar when opening a Document

When opening a document, Notebooks by default briefly shows a line with some status information. This can be turned off with this switch.

## Live Count

Set whether Notebooks should display the current number of words, number of characters, both or none of them while typing.

## Clickable Links

Select which texts should be shown as clickable URLs in documents. Available options are numbers, email and links, addresses and calendar events.

## Timestamps

Select the time stamp formats that should be available in the time stamp menu while editing. The sequence in which you select the formats defines the order in which they appear in the menu.

## Photo Size

Define the size of photos that are imported into Notebooks and the maximum zoom scale when viewing them.

## Sketch on White Paper

New sketches by default use the currently selected background pattern. If you want to draw an white paper instead, turn this switch on.

## Use formatted text instead of Webarchives

When you copy some formatted text from Safari, Mail or other applications and add that to Notebooks via the *New from Pasteboard* option, Notebooks by default creates a webarchive. These archives have the advantage of preserving the original style as much as possible. However, they cannot be displayed on non-Apple devices. - This option tells Notebooks to insert formatted documents as HTML instead.

## PDF Page Orientation

Set whether PDF documents created in Notebooks should use portrait or landscape orientation.

## Show Header & Pagenumber (when creating PDF)

Set whether PDFs created in Notebooks should show header and footer.

## Require Password for PDF Documents

With this switch turned on, Notebooks prompts you for a password when you create a PDF. To open a protected PDF in Notebooks or on any other device, the user needs to enter the exactly same password. (When Notebooks prompts for a password and you leave the field empty, the PDF will not be encrypted).

## Minimize Right Margin (iPhone only)

Text documents use smaller margins than usual to fit as much text on a single line as possible.
If you prefer to use the maximum amount of screen space, turn on this option.

# TASKS

## Default Inbox

The *default inbox* is a task list for unsorted or "incoming" tasks. Usually this is a list at the top of the hierarchy where it is easy to find, but you are free to set any of your task lists as *inbox*. When a default inbox is set and you select a word of phrase in a document, the pop up menu (and the action menu) offers an option to add this phrase a new task in your inbox. This is a convenient way of quickly adding tasks to you inbox, no matter which document you are just working on.

## Look ahead for Due Tasks

Define if the smart book Due Tasks should list tasks that will become due within the next couple of days. You can also set this from the smart book's context menu.

## Prefix for Tasks

Notebooks can automatically divide a document into tasks (by paragraph or line, for example). To make that process more flexible you can define a character or phrase which should mark a task. An example should make that clearer:
If you set the character "#" as prefix here and then select "Split to Tasks", Notebooks looks for lines starting with "# " (please note the trailing space) and extracts only those lines as tasks; all other lines are ignored.
This can be very handy when typing meeting minutes, for example, as you can mark tasks or todos while typing and quickly extract them later.

## Delete Note after Split

Turn this option on if you want Notebooks to delete the original note after converting it to a task list or splitting it into separate tasks. (This has no effect when extracting tasks at a prefix).

## Hide Done Tasks

When this switch is on, done or cancelled tasks are no longer shown in task lists. They are still there, they are just not displayed.

# CONTEXTS

## Enable Contexts

Start using context tags throughout Notebooks. When enabled, you have:

- an extra section in settings to manage contexts; this allows you to add, rename, delete and reorganize your contexts
- a new smart book listing all available contexts and their associated books and notes

- the option to set contexts for books and notes from their info view

## Manage Contexts

Add, remove and edit the names of your context tags.

## Managed by Notebooks

Notebooks can detect and automatically extract context tags from the contents of your editable documents or abstracts. It looks for words starting with # or @ and interprets these as context tags. To remove a tag from a document, just delete the tag from the text.
You can even use these context tags to assign due dates to tasks. A tag like #20140117 would assign Jan 17, 2014 as due date and immediately remove this tag from the text.

# PROTECTION

## Enable Protection

Globally enable or disable protection. When ON, the option to lock and unlock Notebooks and to protect/unprotect books and notes becomes available in the item's info views. More details are available in an extra section.

## Require Code Immediately (default setting)

When you close Notebooks while a protected document is displayed, it will immediately ask for the passcode when you open Notebooks again. Turn this switch off and Notebooks will not ask you for the code if you reopen it within 30 seconds.

## Touch ID

Use Touch-ID to unlock Notebooks. This option is available on devices supporting Touch-ID.

# IMPORT, EXPORT AND SYNC

## WiFi Sharing

Turning this on adds the option "Share This Book" to the book's action menu. Set a user name and password of your choice which need to be entered on the computer from which you to connect to Notebooks.

## Dropbox Sync

Activate synchronization with Dropbox, log in to Dropbox and adjust settings. When on, you find the option *Sync - Dropbox* in the context menu of books.

## WebDAV Sync

Turn on synchronization with a WebDAV service.

## iTunes File Sharing

Turn this on if you want to exchange documents with your computer through iTunes. When on, you find the options Export to iTunes in the action menu of books and documents.

## Mark unsynchronized Documents

When this option is on, Notebooks displays a special icon for documents that

have been modified since the latest synchronization.

By default, Notebooks looks at documents and ignores their corresponding system file. If you want to see the state of the system files, too, turn on the option Include System Files. Now the document will be marked with the special icon when the system file has been modified, even if the contents of the document itself is unchanged.

# INTEGRATION

## Print with WePrint

If you have one of EuroSmartz' printing applications installed (Print, Print&Share or DocPrinter), this switch lets you activate printing from Notebooks. When ON, a document's action menu will show the option to print.

## Send to Things, OmniFocus, Appigo Todo, Firetask, The Hit List etc.

With the corresponding application installed, turning ON this switch enables sending notes (or the selected text) to the that application and creating a new task.

## Enable TextExpander

When you have TextExpander touch installed on your iPhone or iPad you can use it in Notebooks by enabling it here.

# BUY MORE MODULES

Here you find a list of modules that can be purchased and activated separately.

# ABOUT NOTEBOOKS

Shows statistics about Notebooks and provides links to Help, Version History, FAQ and Contact.

# Further Information

For more and up to date information, please refer to:

http://www.notebooksapp.com
http://www.notebooksapp.com/news
http://www.notebooksapp.com/faq

Or contact us at: info@notebooksapp.com

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