Notate for Mac OS X User Guide

Overview: Notate is designed for the mobile professional and to meet the needs of business and enterprise data management regulatory compliance. Notate supports key MDM market leaders with both IOS and Android platform support. IT can securely control content with behind the firewall Exchange syncing and administrative application policies – data can be secured when stored, encrypted in-flight and managed on mobile devices through MDM partnerships.

Notate allows users to easily and quickly capture all their important information. With a rich text editor and handwriting support notes can easily and quickly be created. Notate supports adding photos, audio recordings and documents to your notes, information is now centralized in one easy to use application and with Notates device syncing, information is available across all your devices.
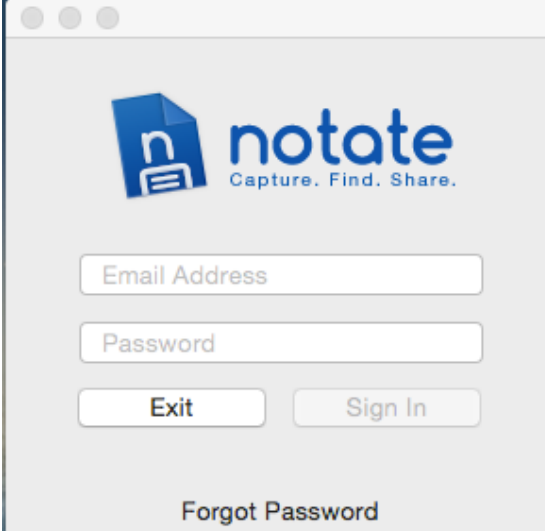
System Requirements:

- Notate Platform Support:
    - Apple iOS 7 & 8
    - Android v 4.0 and above
    - Windows 7 & 8
    - Mac OS

- Exchange Server 2007, 2010 & 2013

Notate Set-up

Once Notate has been downloaded to your computer, run the set-up wizard. The first thing you will be required to complete is the licensing registration. Enter your email address and the password that has been previously provided.

User Log-in

Exchange Outlook Note and Device Syncing

Notate supports note syncing with your Outlook account and other Notate enabled devices that have been authorized for use (Windows, IOS and Android). Your organizations Exchange URL should be auto-filled in the dialog box and to complete the Exchange set-up process enter your email address and password. When authorized your Outlook notes will automatically sync to your computer.

Note: if your Exchange Server URL is not automatically "filled" contact your IT admin for the correct settings.
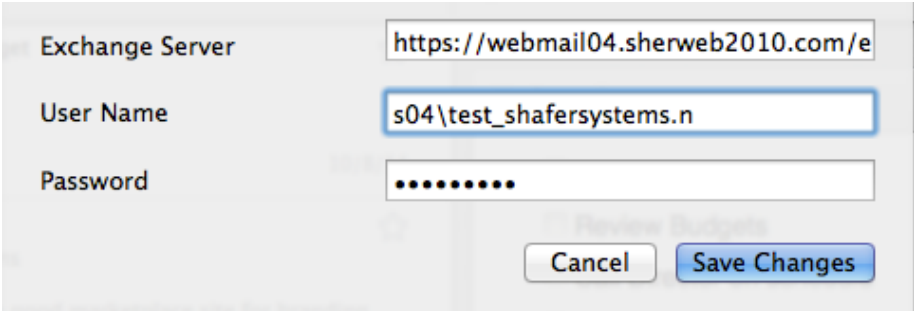
Important Note: After you have set-up syncing your Outlook account, you will see a lighting bolt associated with your Notebook, (green indicates that syncing has been completed). If you see a grey sync indicator this means that your credentials might be incorrect or communication has been lost between the device and Exchange. If you confirm your device has network communications the next step is to verify that your Outlook password has not changed, if so re-enter your Outlook user password into the exchange set-up dialog box to restore syncing communications.
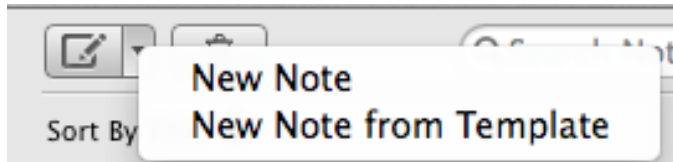
Notate Home page
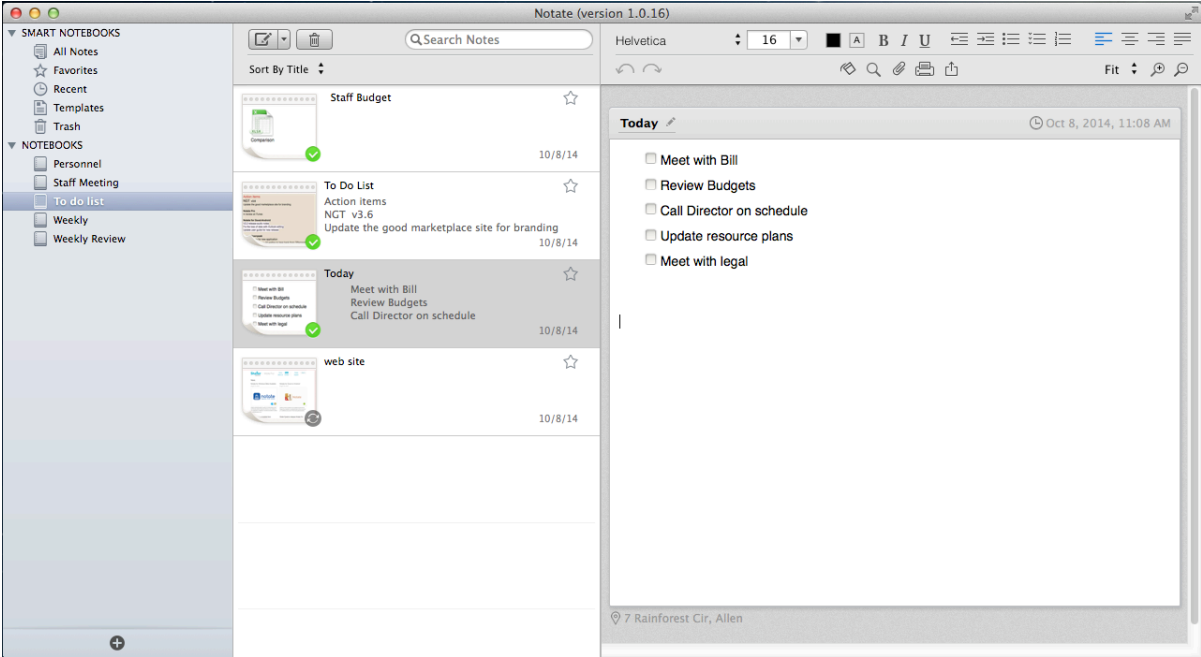
Getting Started Using Notate

Create a new note

The first thing to do is create a new note. The easiest way to create a new note is to click on the square with the pencil icon. A pull down menu will be displayed that will allow you to choose New Note or New Note from Template. The note will now be displayed in the right hand panel of the application.

To add a note title place your cursor on the "New Note" wording that is underlined with a pencil above the body of the note. To begin adding a new title to your note - place your cursor in body of the note and enter the new title. The note can be viewed in full-screen mode by double clicking the note in the preview window and then closed from full-screen mode by selecting the red circle in the upper left hand corner.

Text Editor: Notate supports a rich editor mode with many options available for text editing. Text formatting can be changed by selecting text with your cursor and clicking the new format. The undo & redo arrows above the note title provide a convenient interface to correct mistakes with text editing.

Prior to changing any format the text must first be selected, tap on a word and drag the cursor across the text to change, and then select the format.

- Font type and size
- Background highlighter and font colors
- Bold, italics, & underline.
- Tabbing to right or left.
- List (bullets, numbers, and checkmarks)
- Alignment (left, center, right)

Background colors, Find/Replace, Inserting image, Attaching Files and Printing: Notate supports the following additional feature of background colors, text search and attachments.

- Adding background colors and lines to notes (paint can icon)
- Find/Replace text inside an existing note (magnifier icon)

- Inserting Attachments (picture, audio file, video file, document file)
- Printing
- Sharing or email

Important: Whenever you move from one note to another note, the note you are working on is automatically saved.

Playing Audio Notes: Audio notes captured on your device can now be played in Notate for

Mac. All audio notes appear with the following icon and can be played by clicking on the arrow in audio icon. To stop or cancel the audio playback select "cancel" at the top of the note.

Resizing images: To resize an image within your note, tap once on the image. The image will now display re-sizing handles in each corner of the image.

URL Hyperlinks
Active URL Hyperlinks are supported in Notes hyperlinks should be typed as the URL www.notateapp.com.

Organizing Notes

Creating Notebooks: Creating new notebooks will help keep your notes and ideas organized. Notebooks are where multiple notes can be stored and managed. From the Notate home page, click the **PLUS +** button on the bottom of the first panel.
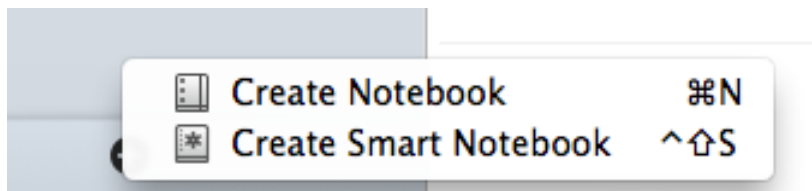
A dialog box will be displayed that will allow you to create and title a new Notebook.

Creating Smart Notebooks: Smart notebooks allow you to develop standard search and save filters for all your notes. Notes will automatically be categorized to individual Smart notebooks based on the attributes that have been set-up. These attributes can include combinations of filters, such as audio notes that also contain the specific text words.

Renaming Notebooks or Smart Notebooks: To rename an existing notebook, select and click on the notebook and it will be in edit mode for changing the name.

Deleting Notebooks or Smart Notebooks: To delete an existing notebook, select the notebook and right click to display the menu list for deleting a notebook.
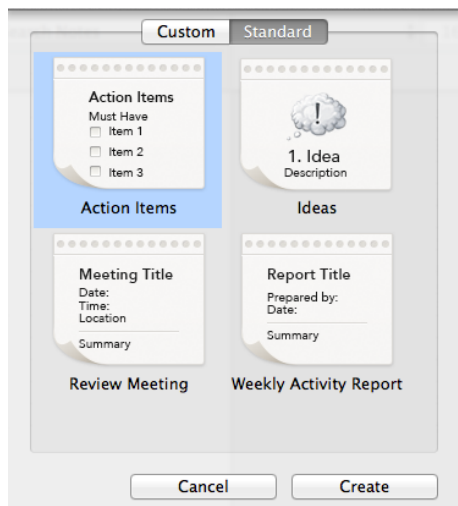
Using the Favorite note setting "STAR" ⭐

Notes that are used frequently or are considered special can be easily categorized using the "Favorite" filter. Any note can be tagged as a favorite by selecting the star shape next to the note. When selected the star image will turn to gold, the note can be de-selected as a favorite by clicking on the star image again.

Moving Notes to other Notebooks: Any note can be moved to another notebook by selecting the note to move and using drag and drop to the notebook your wanting to move to.

Templates: The template notebook provides pre-formatted notes for creating notes quickly, templates can be edited and saved and newly created notes with different formats can be saved to the template folder for easy access when creating a new note. To access the standard templates use the new note command and select Standard. Any note can be dragged into the template folder to create a custom template.

Custom	Standard
Action Items	
Action Items Must Have ☐ Item 1 ☐ Item 2 ☐ Item 3	1. Idea Description
Action Items	**Ideas**
Meeting Title Date: Time: Location Summary	Report Title Prepared by: Date: Summary
Review Meeting	**Weekly Activity Report**

Cancel   Create

Searching for notes: Notate provides text searches across all notes; this includes text in the body of the note, and any descriptions in audio, photos, images or web clippings. To clear the search, tap on the 'X' on the far right of the search field.

🔍 Search Notes

Sort By Title ⬍
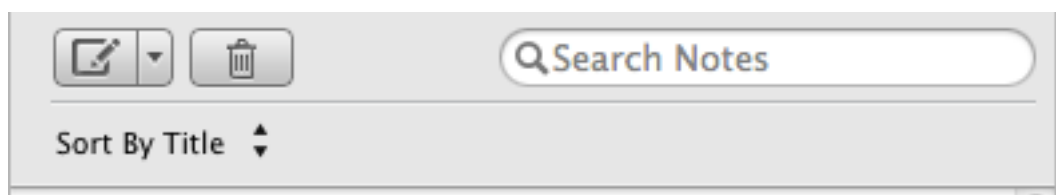
Sort notes by date or title: Once a notebook has been selected, notes can be sorted by date or alphanumeric using the **Sort** command which provides the date or title menu option

Deleting Notes: To delete a note just click the delete trash icon and the selected note will be moved into the trash folder. It will remain in the trash until the Empty Trash command is executed.

Empty the Trash Notebook

To empty trash – select the Trash notebook and tap on the Trash can icon. Once the empty trash command is completed your notes will no longer be available on your device.

Sharing Notes

Note Sharing: Notate provides multiple options for sharing notes, whenever a note is designated for sharing it will be automatically converted to a PDF.

Emailing Notes: Using the share icon located to the right of the printer icon. The note will be converted to PDF and the email dialog box will display.

Exporting Notes: Notate supports exporting of notes to the Mac file system. First select the print icon, the print dialog box will be displayed, use the PDF pull down menu to "save as PDF".

Printing Function: To use the Printing function you can just simply press the Printing Icon located above the note body in either preview mode or full screen editing mode. The standard print window will appear; the note will be converted to PDF and sent to the printer of your choice.

Shared Notebooks: To set up a Notebook for sharing, right click on the notebook to share. The dialog menu will display the sharing menu option. Click on the Share button to invite other users. When completed a dialog box will pop-up that allows you to invite other team members based on their email address. The email address field will auto-fill users from the Exchange global address book.
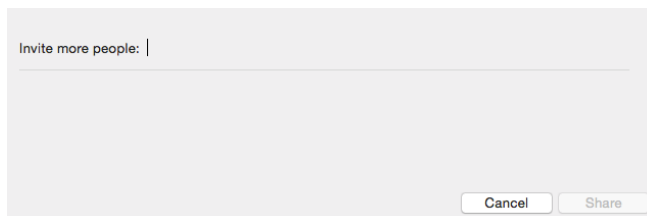
Each invited user will receive an invite notification on their device. Once accepted (shared notebooks can be rejected by the user) the Shared Notebook will automatically show up in the user's list of notebooks. Users can be added and deleted as needed by the Notate user who originally created the shared notebook. All shared notebook users have complete editing capabilities of individual notes. Any note created or moved into a shared notebook is visible to all team sharing members.

On the Notate home screen shared notebooks are identified with a blue background icon.

Shared notebooks that show an arrow up indicates that you are the owner of this Shared notebook.

Shared notebooks that have the arrow pointing down show the notebook is shared to you by another team member.