



TAKE CONTROL OF

NOTES

Covers Apple's
Notes App for
Mac • iOS • Web

by **JOSH CENTERS**

\$5.99

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Read Me First

Welcome to *Take Control of Notes*, version 1.4, published in September 2020 by alt concepts inc. This book was written by Josh Centers and edited by Joe Kissell.

This book tells you everything you need to know about Apple’s Notes app for iOS, macOS, and the web, from basic features like formatting to advanced features like scanning documents, password protecting notes, making sketches, and managing attachments.

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Updates and More

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What's New in Version 1.4

Version 1.4 of *Take Control of Notes* focuses on the changes in iOS 14, iPadOS 14, and macOS 11 Big Sur:

- You can now collapse the pinned note list. See [Pin Notes](#).
- In iOS 14 and iPadOS 14, you can touch and hold the Format **Aa** icon to see a quick formatting menu. See [Learn Basic Formatting](#).
- There is a new handwriting recognition tool. See [Drawing Tools in iOS/iPadOS Notes](#).
- Apple has added lines in iPadOS to [Adjust the Drawing Area](#).
- If you'd rather scribble without handwriting recognition, you can now select handwriting just like regular text and Notes in iPadOS 14 can detect data in handwriting. See [Work with Freehand Writing](#).
- There are changes to how you [Share from Notes](#).

What Was New in Version 1.3

Version 1.3 of *Take Control of Notes* adds more new changes in iOS and iPadOS (including version 13.2 of each), and macOS 10.15 Catalina, most notably:

- The new subheading style. See [Apply Styles](#).
- Drawing tools, which used to be awkwardly split into separate sketch and inline drawing functions, and have now been merged. See [Drawing Tools in iOS/iPadOS Notes](#).
- The new capability to make a sketch on an iPhone or iPad and import it into a note on a Mac. See [Import a Sketch to macOS](#).

The book has also been updated to reflect lots of other small changes Apple has made to Notes.

Introduction

When it debuted alongside the iPhone, the Notes app was about as bare-bones as a notes app could be. It took only plain-text notes—displayed in Marker Felt against a ruled yellow background—and didn’t do much else.

Over time, Notes became more capable. It moved to the Mac, got a makeover, and gained the capability to create things like sketches and checklists, and even scan documents.

Even if you’ve used Notes for years, you might be missing out on some of its best features. It’s an amazingly capable app that syncs across the Apple ecosystem, and it could easily become the center of your life. Notes can make to do lists, outlines, tables, and more. The possibilities are nearly endless.

For iPad users who can use an Apple Pencil, Notes turns your iPad into a full-on writing tablet and sketch book. Tap the tip of the Pencil against the Lock screen to create a new note, or tap it inside a note to start drawing.

Notes might not be the most capable app of its kind, but you can’t beat the price or ubiquity. And you might even be impressed by everything it can do.

This book covers the Notes app in iOS 14, iPadOS 14, macOS 11 Big Sur, and to a lesser extent, the iCloud Notes web app. However, much of the text still applies to older operating systems, and I mark exceptions for where things work differently in macOS 10.15 Catalina. I show you how to create notes, tell you how to store and sync them, protect them with a password, apply advanced formatting, add graphics, scan documents, draw, and share to and from Notes.

Notes Quick Start

Notes can do a lot, but everything you need to know basically falls into four categories.

Learn the basics:

- You won't get far without knowing how to [Make a New Note](#).
- If you're moving from another notes app, you can [Import Notes from Other Services](#).
- Once you have a healthy collection, you'll want to [Organize Notes](#) into folders.
- When you can't find a note, you need to know how to [Search Notes](#).
- For sensitive information, you'll want to [Password-Protect Notes](#).

Format notes:

- [Learn Basic Formatting](#) to get started with note formatting.
- [Apply Styles](#) for more advanced formats.
- Learn how to [Work with Lists](#) and you can use Notes for things like task and shopping lists.

Add graphics to notes:

- You can [Add Photos or Videos](#) to a note.
- Need to quickly digitize a paper? Notes can [Scan Documents](#).
- You can [Write and Draw with Notes](#).

Share to and From Notes:

- Add images, links, map locations, and more with [Share to Notes](#).
- [Share from Notes](#) so you can collaborate with others.
- [Browse Notes Attachments](#) to quickly find photos, documents, audio clips, and more!

Why Notes

If you're considering Notes as your main note app, this chapter will let you know if Notes is right for you or not. If you already use and like Notes, feel free to skim this chapter, but you might learn something you didn't know! Here are three reasons why you might consider Notes as your primary note-taking app:

- **It's always there:** If you're heavily invested in the Apple ecosystem, Notes is always there: on your iPhone, your iPad, your Mac, and any computer with a web browser. The best notes app is often the one that you have with you. (Unfortunately, there is no Notes app for the Apple Watch, and of course Notes isn't on Apple TV.)
- **Seamless syncing:** For the most part, iCloud sync works flawlessly between Notes on different devices. Make a change on one platform and it appears on the others almost instantly.
- **Versatility:** As I explain below, and throughout this book, Notes has a wide variety of tools for formatting notes, making lists, and creating graphics. You might be surprised at what all Notes can do!

And here are some reasons you may *not* want to rely on Notes:

- **You need tags:** A lot of people swear by tagging for organizing information, and Notes doesn't do that. You can create folders in Notes or even add search terms to the bottom of a note, but if you want dedicated tagging, look elsewhere.
- **You need serious formatting:** Notes has some pretty good formatting options (see [Format Notes](#)), but don't expect an expansive formatting palette.
- **You store a lot of attachments:** You can stash a lot of different file types in a note (see [Share to Notes](#) and [Browse Notes Attachments](#)), but it's not Notes's *raison d'être*. You can't search inside attachments, and iCloud sync might choke if you have too many large attachments.

Before deciding whether or when to use Notes, you should know what it can do. Here are a few real-world examples of tasks it can perform:

- **Quick text:** A big advantage of Notes if you're an iPhone or iPad owner is that you can quickly start a note from the Lock Screen, either from Control Center or with an Apple Pencil. See [Make a New Note](#).
- **Organize research:** In theory, Notes wouldn't be my first choice for stashing research materials, but, again, the best note app you have is often the one you have with you. You can share documents and web links to a note (see [Share to Notes](#)), scan physical documents into a note (see [Scan Documents](#)) and even use Notes to create rudimentary outlines (see [Indent Lists](#)). I often use Notes for planning Take Control titles and for serious study.
- **Keep secrets:** Did you know that you can [Password-Protect Notes](#) with sensitive information? That's especially useful to know if you store things like financial documents in a note.
- **Take handwritten notes and sketch ideas:** If you prefer old-fashioned input, Notes can do that. With your finger or an Apple Pencil, you can hand-write notes and make sketches. See [Write and Draw with Notes](#).

Use iCloud Notes

You likely use Notes primarily on iOS and macOS, but if you're on any operating system with a full-featured web browser, like Windows or Chrome OS, you can access Notes from [iCloud.com](https://www.icloud.com) by logging in and clicking Notes from the app launcher.

iCloud Notes works very similarly to the desktop Mac app, but with some notable limitations. iCloud Notes can't:

- [Import Notes from Other Services](#).
- Add a lock to a note, but it can lock and unlock notes that already have one. See [Password-Protect Notes](#).
- [Pin Notes](#).
- Apply the strikethrough format. See [Learn Basic Formatting](#).
- [Make Tables](#).
- [Add Photos or Videos](#).
- Mark up attachments like images and PDFs. See [Mark Up Attachments in macOS](#)

If your circumstances would make iCloud Notes your primary Notes interface, I'd recommend something else, but as an ancillary to the macOS and iOS versions of Notes, it's perfectly serviceable.

Make and Manage Notes

In this chapter, we cover the very basics of making and managing notes—feel free to skip ahead if you don’t need help here, but there are some tricks you may not be aware of, such as creating notes from the Lock screen, importing notes from other note apps, and setting your default sort order. You can also lock notes so that a passcode, Touch ID, or Face ID is required to unlock them.

Choose Where to Put Notes

There are three places where you can store notes:

- **In iCloud:** By default, Notes are stored in whatever iCloud account you’re logged into. On a Mac, you can find that in System Preferences > Internet Accounts > iCloud and in iOS under Settings > *Your Name*. For most people, this is the best choice.
- **On the device:** You can choose to save notes directly on your device. This offers the best privacy, but has two major drawbacks: notes stored locally do not sync and if your device is lost or erased you could lose those notes if you’re not regularly backing up the device.

This option is disabled by default. To enable it on a Mac, open Notes > Preferences and select “Enable the On My Mac account.” On iOS, go to Settings > Notes and turn on “On My iPhone” Account (or “On My iPad” Account).

- **On an IMAP server:** If you’ve set up an IMAP mail account on your device, you can store notes there and they will sync between the devices linked to that account. The upside is that this provides cross-platform sync. The downside is that notes stored in an IMAP account have limited formatting options.

To sync notes with IMAP, you must make sure that service is enabled. On a Mac, go to System Preferences > Internet Accounts > *Email Provider Name* and check Notes. In iOS, visit Settings > Mail > Accounts > *Email Provider Name* and enable Notes.

Note: See Joe Kissell’s [Take Control of Apple Mail](#) for more on setting up mail accounts on macOS and iOS.

Set Your Default Notes Account

To set your default account in Notes on a Mac, go to Notes > Preferences and choose an account from the Default Account pop-up menu. On iOS, go to Settings > Notes > Default Account, which shows iCloud, any enabled IMAP accounts, and saving to your device if that’s enabled. By default, new notes are created under that account, but as I explain below, you can create a note in any account at any time and you can move notes between services—see [Move Notes](#).

Make a New Note

To create a new note, click or tap the Create a New Note  icon (⌘-N). That’s all! Okay, not quite all—there are several alternative ways to create a new note:

- **With an Apple Pencil:** If you have an Apple Pencil and a compatible iPad, tapping the tip of the Apple Pencil on the Lock screen while the iPad is awake creates a new note. Be sure to tap straight down on the screen without moving the tip of the pencil—it may take more than one tap. If just isn’t working, make sure your Apple Pencil is charged.
- **From iOS/iPadOS Control Center:** Tapping the Notes  button in the iOS or iPadOS Control Center makes a new note. Touch and hold that button to see options to make a new note, create a new checklist (see [Work with Lists](#)), take a photo and insert it in a new note (see [Add Photos or Videos](#)), or scan a document and make a new note with it (see [Scan Documents](#)).

Format Notes

You can get by without formatting the text in your notes—in fact, the Notes app didn’t even offer any formatting at first—but doing so makes your notes more attractive and easier to read.

Learn Basic Formatting

Notes offers most of the basic formatting options you’ve come to expect like bold, italic, and even strikethrough.

Click or tap the Format **Aa** icon to see a full range of formatting options (**Figure 5**). To apply formats like bold and italic, you must first select the desired text.

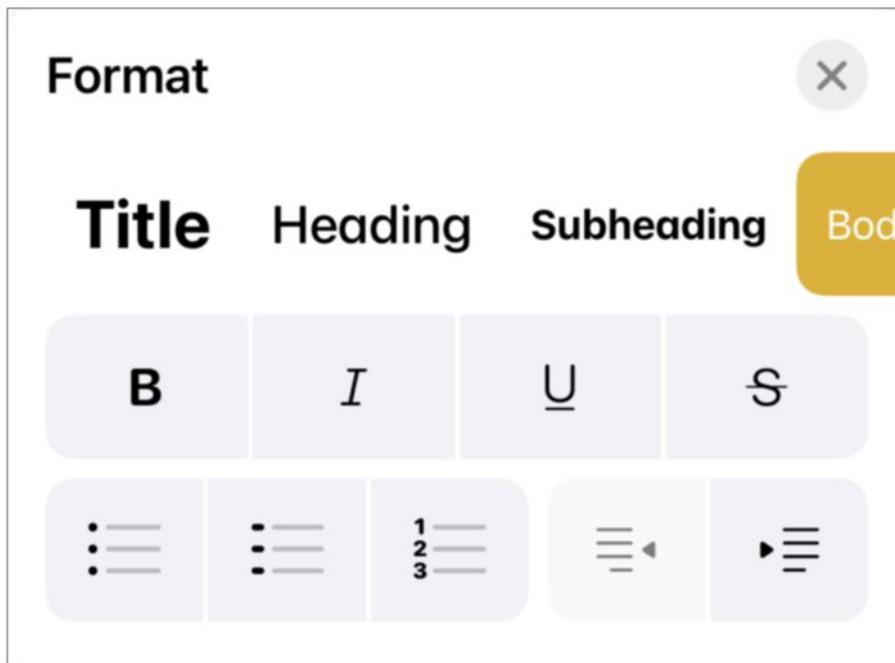


Figure 5: Notes for iOS features this nice formatting panel that conveniently groups all your options together. This is how it looks on the iPhone, but it may look different on your device.

If you’re using a MacBook Pro with a Touch Bar, you’ll also see many of these formatting options there (**Figure 6**).



Figure 6: The MacBook Pro Touch Bar displays formatting options.

Tip: Touch and hold the Format **Aa** icon in iOS 14 or iPadOS 14 to see a quick formatting menu.

To remove a format, simply reapply the same format over the formatted text, or apply the formatting you want.

Mac-Only Formatting Options

There are a few formatting options you can apply only on a Mac (**Figure 7**):

- ✦ **Text Size:** You can adjust the display size of text in a note by choosing Bigger (⌘=) or Smaller (⌘--) in Format > Font.
- ✦ **Text Color:** Choose Format > Font > Show Colors (⌘-Shift-C) to show the system color palette. To change text color, select text and click a color in the palette.
- ✦ **Superscript and Subscript:** You can set text as superscript or subscript in Format > Font > Baseline, which is handy for chemistry and mathematics.
- ✦ **Alignment:** You can Align Left (⌘-{}), Center (⌘-|), or Align Right (⌘-}) paragraphs in Format > Text.

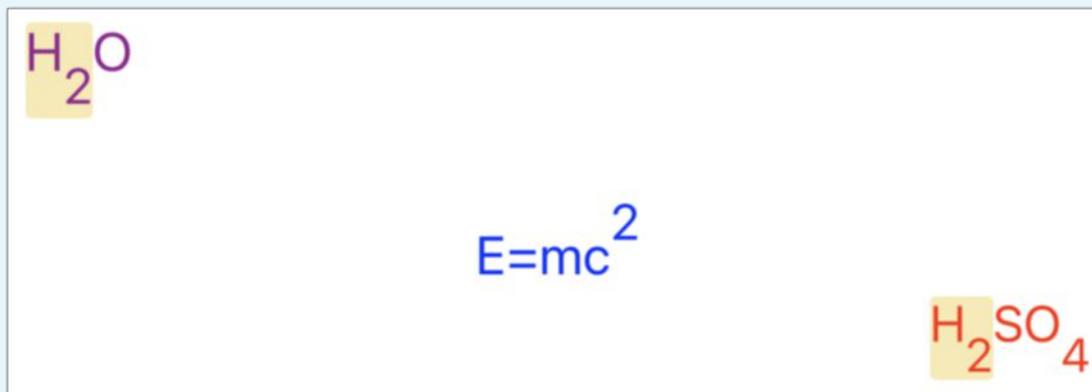


Figure 7: A sample of the formats you can only apply on a Mac.

While you can't apply these formatting options in iOS or iPadOS, all of them carry over from macOS.

Use Graphics in Notes

Notes isn't restricted to text: you can embed photos and videos in a note, draw in notes, or even scan documents!

Add Photos or Videos

macOS and iOS offer different ways of importing photos and videos into Notes.

Add Photos and Videos to Notes in macOS

The easiest way to add a photo or video to a note on a Mac is to drag in one from the Finder or Photos or paste in one that you copied from elsewhere. Here are some other ways to add graphics to a note in macOS:

- **Continuity Camera:** You can use a device running iOS 12 or later to capture a photo directly into Notes on a Mac running macOS 10.14 Mojave or later. This feature is called Continuity Camera. Here's how it works:
 1. While in a note, choose File > Insert from iPhone or iPad > Take Photo (what you see here depends on which devices you have).
 2. A streamlined version of the Camera app opens on your device—you can tap the flash  or change camera  icons to adjust those things, but otherwise tap the shutter button to take a photo.
 3. Tap Use Photo.
 4. The photo appears directly in your note.

Tip: If the Camera app isn't opening on your iOS device, try logging out of your iCloud account in Settings > *Your Name* and signing back in. This is messy and causes all kinds of headaches, but usually works.

I've made a [video showing how to use Continuity Camera](#).

- **Photos browser:** You can view your Photos library directly in Notes by choosing Window > Photo Browser. From there you can drag and drop an image into a note (**Figure 19**). However, note that the Photo Browser may be very slow to load.

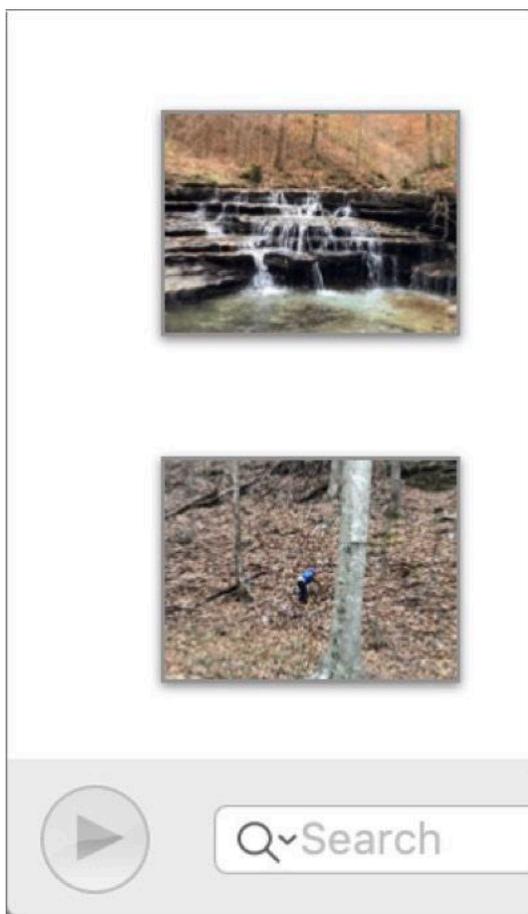


Figure 19: The Photo Browser lets you view your Photos library directly from Notes.

Tip: If you're using macOS 10.14 Mojave or later, Click the photos  button on the toolbar to reveal both Continuity Camera options and the Photos browser.

Share to and from Notes

Notes can contain much more than images and scanned documents. You can share websites, maps, and other things to a note. Likewise, you can share a note with others, and even add collaborators to a note!

Share to Notes

You're probably already familiar with the Share  icon in iOS and some macOS apps (if not, check out my book [Take Control of iOS 14 and iPadOS 14](#)). Click or tap that icon and you can share items with other apps. But did you know that you can share things to Notes from apps like Maps, Safari, and Voice Memos? Here's how:

1. While viewing content you want to add to a note, find and either tap or click the Share  icon.
2. On iOS and iPadOS, tap Notes, which should be in the second row of the activity view. If not, swipe the second row all the way to the left and tap More. On macOS, click Notes from the pop-up menu.
3. In the dialog that appears, enter any additional text you would like to add, choose the note to save to, and tap or click Save. If you choose New Note, a new note is created with the attachment (**Figure 28**).

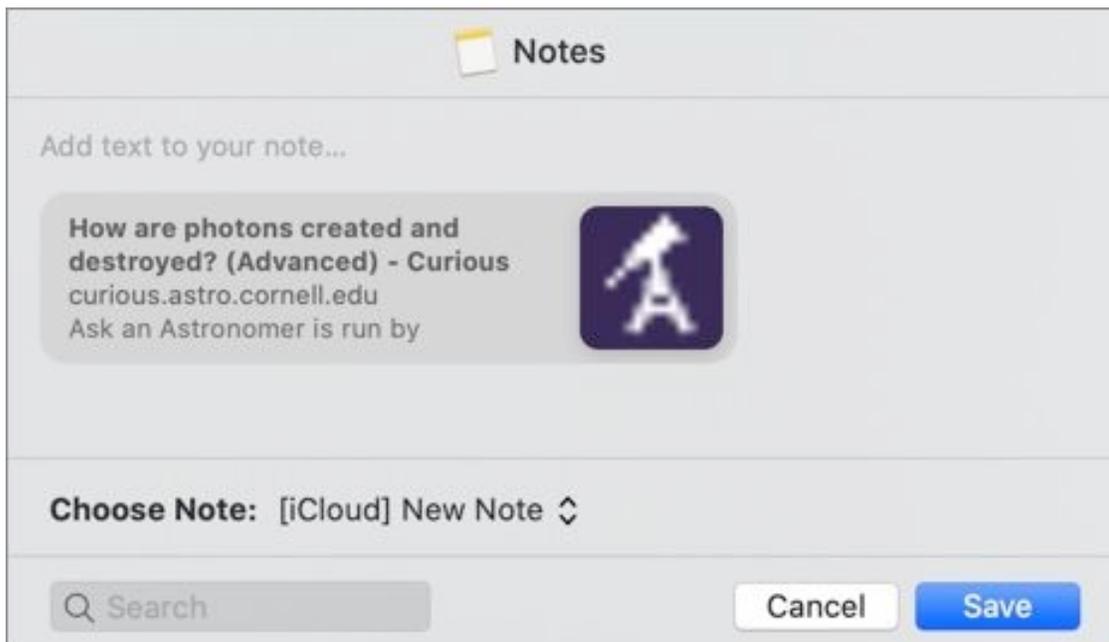


Figure 28: Sharing to Notes.

Don't be afraid to experiment with sharing to Notes from other apps—you might be surprised at what you can put in a note! In **Figure 29**, I show a couple of examples of what a note can contain: an audio file from Voice Memos and a location from Maps. But remember that if you sync your Notes to iCloud, those attachments count against your iCloud storage quota.

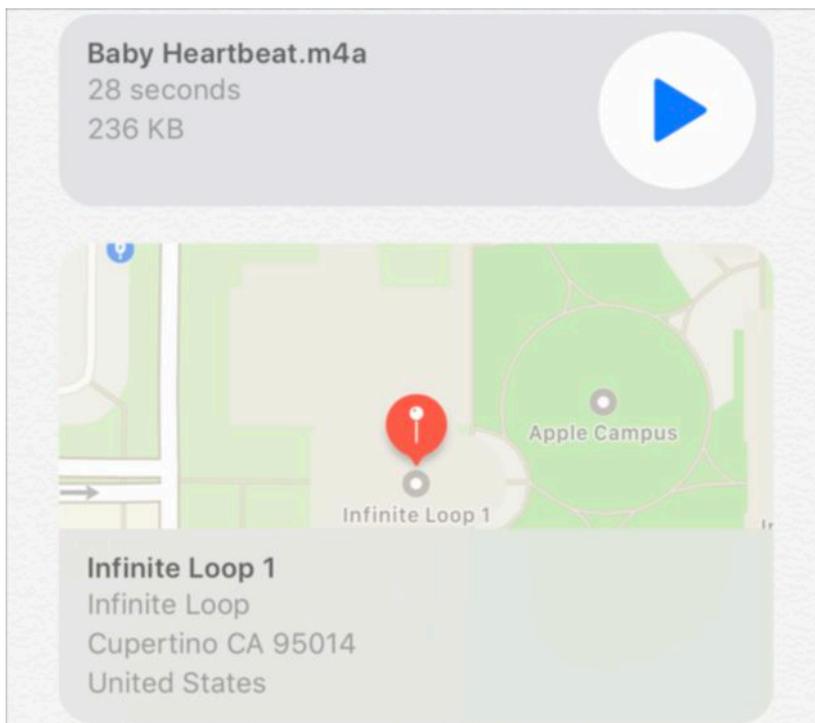


Figure 29: Examples of the types of media a note can contain.

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About the Author



Josh Centers is the Managing Editor of [TidBITS](#) and a contributing blog editor at [The Prepared](#). He is also the author of [Take Control of iOS 14 and iPadOS 14](#); [Take Control of Apple TV](#); [Take Control of Apple Home Automation](#); and coauthor of [Take Control of Preview](#) with Adam Engst. He has been featured in USA Today, Macworld, Scientific American, the Washington Post, Boing Boing, the Wirecutter, and other publications, as well as on Comedy Central, HuffPost Live, and Voice of America.

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Shameless Plug

Hey guys, like and subscribe to my [YouTube channel](#) for tech tips and analysis. I also have a [Twitter](#) if you enjoy bad tweets.

About the Publisher

alt concepts inc., publisher of Take Control Books, is operated by [Joe Kissell](#) and [Morgen Jahnke](#), who acquired the ebook series from TidBITS Publishing Inc.'s owners, Adam and Tonya Engst, in May 2017. Joe brings his decades of experience as author of more than 60 books on tech topics (including many popular Take Control titles) to his role as Publisher. Morgen's professional background is in development work for nonprofit organizations, and she employs those skills as Director of Marketing and Publicity. Joe and Morgen live in San Diego with their two children and their cat.

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