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TAKE CONTROL OF

NOTES

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

by **JOSH CENTERS**

\$5.99

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Table of Contents

Read Me First	3
Updates and More	3
What's New in Version 1.5	4
What Was New in Version 1.4	4
Introduction	6
Notes Quick Start	7
Why Notes	8
Use iCloud Notes	10
Make and Manage Notes	11
Choose Where to Put Notes	11
Make a New Note	12
Make a Quick Note.....	14
Import Notes from Other Services	18
Organize Notes	18
Search Notes	24
Password-Protect Notes	25
Format Notes	29
Learn Basic Formatting	29
Work with Lists	33
Make Tables	37
Use Graphics in Notes	39
Add Photos or Videos	39
Scan Documents	41
Write and Draw with Notes	44
Browse Notes Attachments	52
Share to and from Notes	53
Share to Notes	53
Share from Notes	55
About This Book	60
Ebook Extras	60
About the Author	61
About the Publisher	62
Copyright and Fine Print	63

Read Me First

Welcome to *Take Control of Notes*, version 1.5, published in September 2021 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 1.5

Version 1.5 of *Take Control of Notes* focuses on the changes in iOS 15, iPadOS 15, and macOS 12 Monterey:

- In iPadOS 15 and macOS 12 Monterey, there is a new Quick Note feature that lets you quickly take a note without opening the Notes app. See [Make a Quick Note](#).
- You can now tag notes to organize them. See [Tag Notes](#).
- In shared notes, you can swipe right to highlight changes in a note and reveal who made them. There is now a new Activity view to see all See [Share from Notes](#).
- Also in shared notes, you can @-mention other people in the note—for example, if you want to assign a task. See [Mention Another Person in a Shared Note](#).
- You can make tables in iCloud Notes for the web. See [Make Tables](#).
- Search in iOS 15, iPadOS 15, and macOS 12 Monterey can recognize text in images on newer devices, and that extends to the Notes app. See [Take Control of iOS 15 and iPadOS 15](#) for more details on that and other useful things like capturing text from real-world sources.

What Was New in Version 1.4

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

- You can now collapse the pinned note list. See [Pin Notes](#).
- Starting 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 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 and later can detect data in handwriting. See [Work with Freehand Writing](#).
- There were changes to how you [Share from 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 15, iPadOS 15, and macOS 12 Monterey, and to a lesser extent, the iCloud Notes web app. However, much of the text still applies to older operating systems. 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 serious formatting:** Notes has some pretty good formatting options (see [Format Notes](#)), but don't expect an expansive formatting palette.
- **You're not all-in on Apple:** Notes isn't available on Android and it doesn't have native apps for Linux and Windows.

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](#). In iPadOS 15 and macOS 12 Monterey, you can [Make a Quick Note](#) from anywhere.

- **Organize research:** You can [Tag Notes](#), 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 and 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](#).
- [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 and iPadOS 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 in iPadOS).

- **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. In macOS, go to System Preferences > Internet Accounts > *Email Provider Name* and check Notes. In iOS and iPadOS, 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. In iOS and iPadOS, 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.

Note: There is a new method to create a quick note in iPadOS 15 and macOS Monterey. See [Make a Quick Note](#), below.

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 9**). To apply formats like bold and italic, you must first select the desired text.

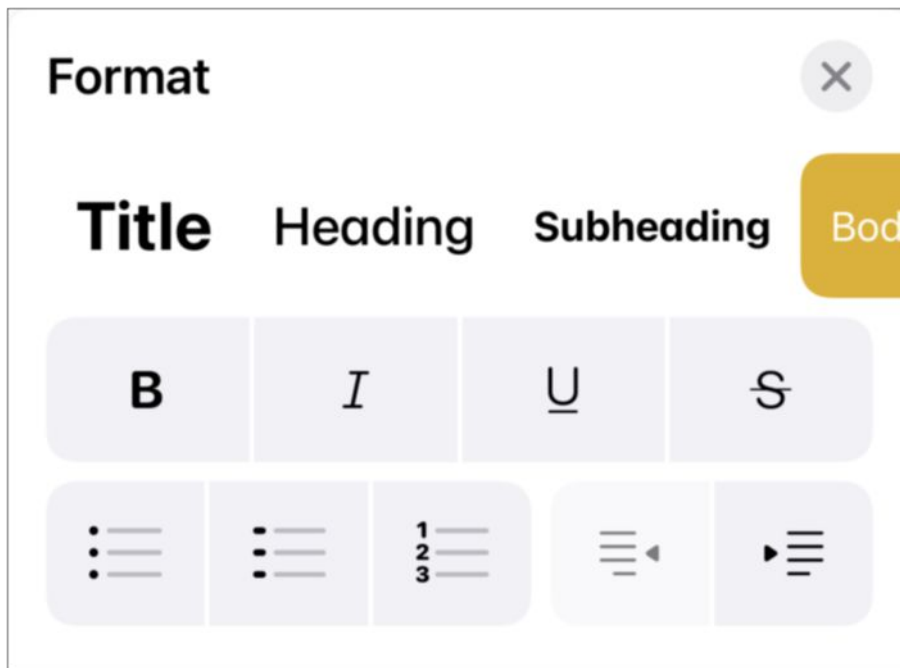


Figure 9: Notes for iOS features this nice formatting panel that conveniently groups all your options together. This is how it looks on the iPhone, but it may look different on your device.

If you’re using a MacBook Pro with a Touch Bar, you’ll also see many of these formatting options there (**Figure 10**).



Figure 10: The MacBook Pro Touch Bar displays formatting options.

Tip: Touch and hold the Format **Aa** icon in iOS 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 11**):

- ✦ **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.

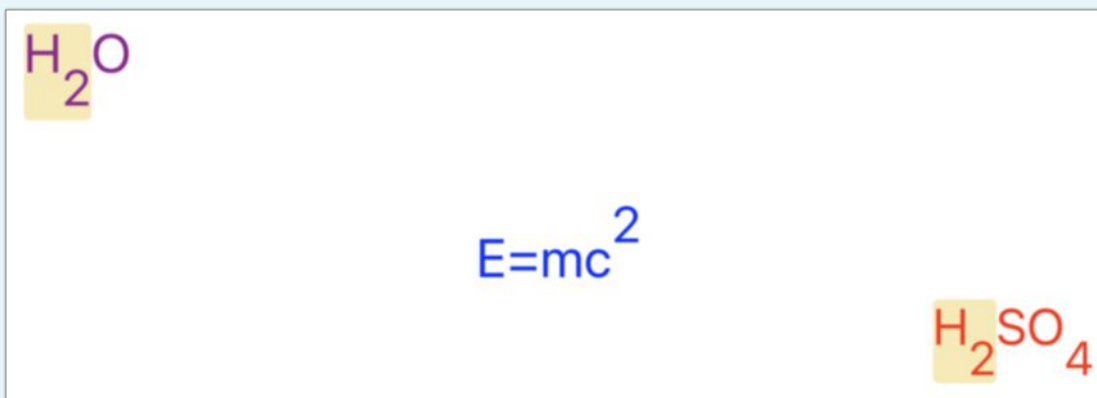


Figure 11: A sample of the formats you can only apply on a Mac.

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 22**). However, note that the Photo Browser may be very slow to load.

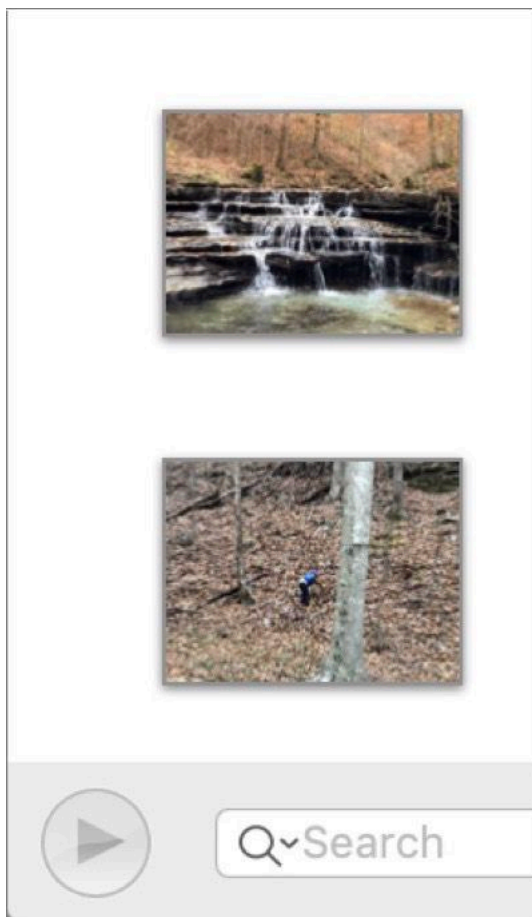




Figure 22: The Photo Browser lets you view your Photos library directly from Notes.


Tip: 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 15 and iPadOS 15](#)). 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 32**).

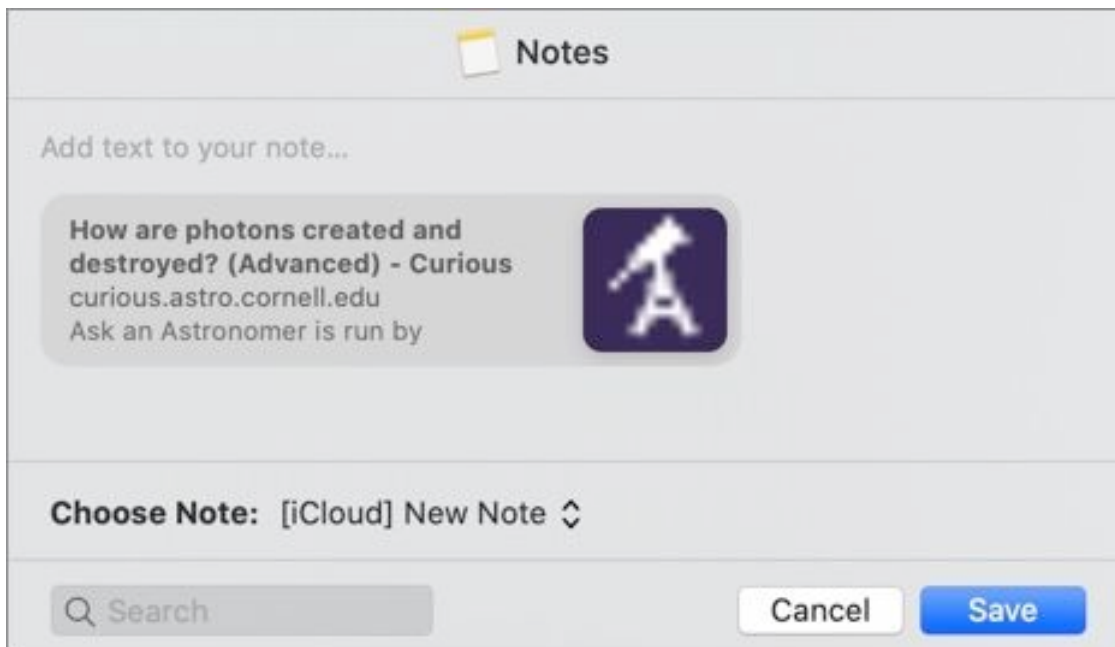


Figure 32: Sharing to Notes.

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 33**, 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.

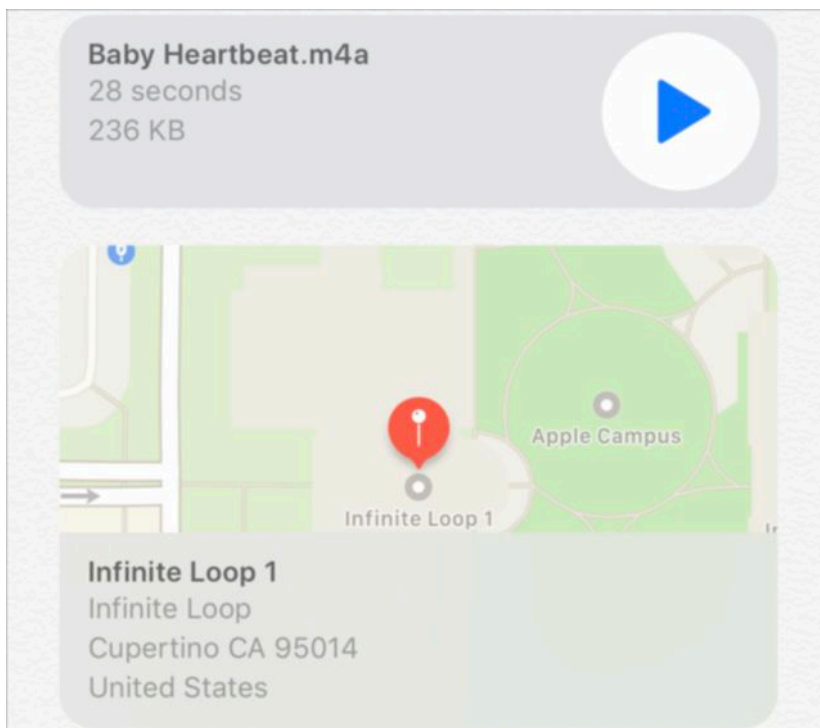


Figure 33: Examples of the types of media a note can contain.

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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 15 and iPadOS 15](#); [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, Wirecutter, and other publications, as well as on Comedy Central, HuffPost Live, and Voice of America.

Josh lives in Tennessee with his wife and sons.

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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.

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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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