

DEVONthink

VERSION 2.3.4
DOCUMENTATION

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READ ME

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Make the dream of the paperless office come true with DEVONthink Personal. Use DEVONthink Personal to keep all of your

- ▶ digital documents
- ▶ notes
- ▶ images
- ▶ multimedia files
- ▶ chat logs
- ▶ bookmarks

together in one database. Use DEVONthink Personal to integrate documents on your hard drive, live content from the Internet, your notes, and your project-related information, all together so that you can search and analyze them.

THE DEVONTHINK PERSONAL ADVANTAGE

WHY DEVONTHINK PERSONAL?

DEVONthink Personal not only stores documents, it also facilitates

- ▶ editing
- ▶ analyzing
- ▶ organizing
- ▶ finding
- ▶ and archiving

your documents with a flexible and powerful organization tool.

INTEGRATED WORKSPACE

Unlike the Finder, DEVONthink Personal provides an integrated environment with all the tools you need for working with information. Don't waste time with digging through thousands of files but let DEVONthink Personal intelligently assist you.

As a native Mac application, DEVONthink Personal is also tightly integrated with Mac OS X. DEVONthink Personal provides a [Dock menu](#), [Services menu](#) commands, and makes heavy use of the Safari Web browser engine. Of course, DEVONthink Personal runs natively on both PowerPC and Intel processor based Macs.

WHAT CAN YOU DO WITH IT?

DEVONthink Personal is much more than just a document database -- and so there is more than just one way to use it. Here are some of them:

- ▶ Create text documents, edit them in full screen mode using all the tools Mac OS X provides and cross-reference them with Wiki-style or static links.
- ▶ DEVONthink Personal is the #1 tool for collecting and organizing info bits and snippets on the Mac. Use the [Services menu](#) and the [Dock menu](#) to clip information and jot down notes.
- ▶ DEVONthink Personal treats URLs like any other document, so you can integrate Web content and local documents.
- ▶ DEVONthink Personal makes a perfect repository for images you use frequently.
- ▶ With DEVONthink Personal's ability to index files without storing them in the database, you can also use it for cataloging CD/DVD-ROMs.

EDITIONS

DEVONthink comes in multiple editions optimized for home/semipro and professional, heavy-duty use. You can find a complete list of all the differences [on our Web site](#).

SYSTEM REQUIREMENTS

Every Apple Mac computer with at least 512 MB of RAM, Mac OS X 10.5 or later. In addition, a broadband Internet connection (256 Kbps or faster) is highly recommended.

For stable functioning it is recommended to keep the total number of elements the open database below 300,000 items and 200 to 300 million words. Larger databases could become unreliable due to low memory on current Macs.

INSTALLING, UPDATING, UNINSTALLING

Note: The following procedures do not apply when you have purchased DEVONthink Personal on the Mac App Store. Installing, updating, and uninstalling is all handled by the App Store application in this case.

INSTALLING AND UPDATING

Just move the DEVONthink Personal application package to the Applications folder or any other directory you have access to. Please note that Mac OS X Services and the connection to [DEVONagent](#) work only for applications installed into one of the Applications folders, and that logout and login or a restart is required after installation.

To update an existing version of DEVONthink Personal, simply copy the application package from the disk image to your Applications folder, replacing the old version. Your database(s) will not be affected.

BUYING AN UPGRADE

If you would like to buy an upgrade DEVONthink Personal to a higher edition, you have the following options:

- ▶ [Click here](#) to check your upgrade options.
- ▶ Choose [DEVONthink Personal > Check Upgrade Options](#).

Depending on whether you have purchased DEVONthink Personal in DEVONtechnologies' online shop or in the Mac App Store the second option may or may not be available.

UNINSTALLING

To remove (uninstall) DEVONthink Personal completely from your Mac, trash the following files and folders (~ stands for your Home folder):

- ▶ DEVONthink Personal
- ▶ ~/Library/Application Support/DEVONthink 2
- ▶ ~/Library/Preferences/com.devon-technologies.think.*
- ▶ Dashboard widgets
- ▶ Bookmarklets from your web browser

COMMON TASKS

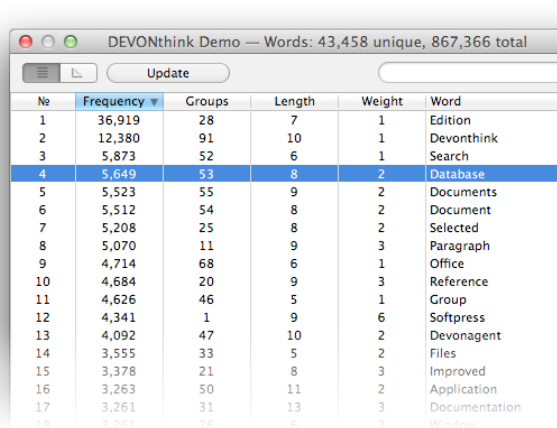
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In this chapter you'll find an number of common ways how you can use DEVONthink Personal for your everyday tasks; from surfing the Internet to making notes, to cataloging photos and archiving emails.

ANALYZE TEXT DOCUMENTS

With its built-in artificial intelligence (AI) functions, DEVONthink Personal can be used to analyze large amounts of text documents.



DEVONthink Demo — Words: 43,458 unique, 867,366 total

№	Frequency	Groups	Length	Weight	Word
1	36,919	28	7	1	Edition
2	12,380	91	10	1	Devonthink
3	5,873	52	6	1	Search
4	5,649	53	8	2	Database
5	5,523	55	9	2	Documents
6	5,512	54	8	2	Document
7	5,208	25	8	2	Selected
8	5,070	11	9	3	Paragraph
9	4,714	68	6	1	Office
10	4,684	20	9	3	Reference
11	4,626	46	5	1	Group
12	4,341	1	9	6	Softpress
13	4,092	47	10	2	Devonagent
14	3,555	33	5	2	Files
15	3,378	21	8	3	Improved
16	3,263	50	11	2	Application
17	3,261	31	13	3	Documentation
18	3,261	26	6	2	Window

Other functions that help you analyze documents include the AI-enhanced [search function](#) that also features a list of similar words based on spelling or contextual similarity. The [See Also](#) button lists documents with a similar content and the topics

pop-up menu displays the most important words of a document. Duplicate documents are instantly marked in blue and bold.

Replicants and cross-links help you create a network of documents.

Possible uses:

- ▶ Analyze the complexity and focus of a given document collection
- ▶ Quickly find relationships between documents or snippets
- ▶ Clean up large document collections

Continue to read here:

- ▶ [Import documents from the file system](#)
- ▶ [Use the See Also & Classify drawer](#)
- ▶ [Use the AI-enhanced Search function](#)

BROWSE THE INTERNET

Besides being a knowledge and information database you can use DEVONthink Personal as a [web browser](#). This extends the document-based approach to knowledge to the World Wide Web. Being a database, DEVONthink Personal's web browser does not work in a windowed style like Safari or [DEVONagent Pro](#); rather, it's document-oriented.

This enables you to treat web pages the same way as you treat your documents. Whenever you select a web document (bookmark), DEVONthink Personal immediately loads and displays its content live from the Internet in the view/edit pane. You can then archive the complete page to the database for offline viewing.

Possible uses:

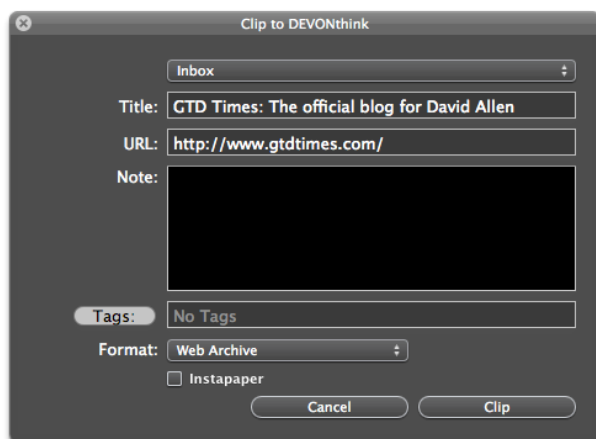
- ▶ Visit frequently used web sites in a convenient interface
- ▶ Integrate 'live' content from the web with your other documents

- ▶ Easily grab data from web sites and store it in DEVONthink Personal
- ▶ Capture and archive complete web pages

Continue to read here:

- ▶ [Capture data from the Web](#)
- ▶ [Create a new URL or HTML document](#)
- ▶ [View 'live' and local HTML pages](#)

CAPTURE DATA FROM THE WEB



More and more information is provided not on paper but directly through Web sites, from blogs to news sites, [Facebook](#), and user forums. DEVONthink Personal offers a variety of options for conveniently capturing data from the Web:

- ▶ **Bookmark:** The most minimal, capturing only the address (URL, uniform resource locator) of the page.
- ▶ **HTML page:** Saves the source code of the page to the database, but images can only be displayed by downloading from the Web each time the page is displayed in the database.
- ▶ **Web archive:** Saves both the HTML code and all resources, like images, necessary to display the page.
- ▶ **Rich text:** Capturing selected text/images avoids saving unwanted areas of the page to the database and will include hyperlinks. A plain text capture will not include formatting, images or links.
- ▶ **PDF:** 'Freezes' the web page just like printing to paper. PDFs from Web pages can be paginated or non-paginated.

All of these options except the bookmark capture the text content of the page (or a selected area of it), capture hyperlinks if present and preserve the text information for searches in DEVONthink Personal.

Note: There are a number of Web sites that one might visit that prohibit use of some of the capture options described above. A secure banking site or a university portal to journals may direct a Bookmarklet or script capture option to the login page, which will be captured instead of the desired content. A capture option that requires re-download of the page on such sites will capture only the login page. Always, the page can be selected and captured as rich or plain text. The viewed page can be captured by 'printing' it as PDF to the database.

Possible uses:

- ▶ Capture important news in an easily searchable database
- ▶ Collect all relevant data for your project in one place
- ▶ Collect links to web pages and captured data about the same subject together in one group
- ▶ Save data from the Web in future-proof formats such as PDF

Continue to read here:

- ▶ [Capture data using Services](#)
- ▶ [Capture data with Bookmarklets or browser extensions](#)
- ▶ [Add the global inbox to the Finder's sidebar](#)
- ▶ ['Print' any Web page or document as PDF to your database](#)

CATALOG YOUR DISKS, CDS, AND DVDS

By using the [Index](#) function, you can use DEVONthink Personal to set up a catalog for CD-ROMs or other removable volumes. Create a group for each disk by using the index function and organize your disks/groups in any way you like. When you need a specific file, search for it in DEVONthink Personal, insert the volume, ^ click the file in DEVONthink Personal, and select *Open With* to open the original file on the removable volume.

Possible uses:

- ▶ Find files even when they're on a removable volume not currently mounted
- ▶ Create a virtual library for all your CD-ROMs and other media
- ▶ Integrate static documents with other project-related data

Continue to read here:

- ▶ [Import or index files](#)
- ▶ [Search your database](#)
- ▶ [Launch the original file of an index item](#)

CATALOG YOUR PHOTOS AND MP3 FILES

Besides storing text documents and PDF files, DEVONthink Personal also manages multimedia data such as photos, illustrations, MP3s, or movies.

While never designed to be an iPhoto or iTunes replacement, DEVONthink Personal can also be used as a repository for images you frequently use or as an interface to your MP3 library (if you don't like other music software). If you do not want to import these files but leave them where they are in the file system but access them from within DEVONthink Personal, index instead of import them. [See also p. 12ff](#)

Possible uses:

- ▶ Create a dedicated database for photos only
- ▶ View your images in full screen mode
- ▶ Keep project-related images and other documents together
- ▶ Play your MP3s from within your work environment

Continue to read here:

- ▶ [Import or index files](#)
- ▶ [View your files as thumbnails](#)
- ▶ [View images and movies](#)
- ▶ [Search your database](#)

COLLECT TEXT SNIPPETS AND OTHER VALUABLE DATA

Using Mac OS X's handy [Services menu](#), DEVONthink Personal is the premiere tool for collecting and organizing information bits and snippets.

Select any piece of data and capture it to the currently open database with a keystroke or a short visit to the Services menu. All Cocoa applications such as TextEdit, Safari, or DEVONthink Personal itself as well as many new Carbon applications, e.g. the Finder or Microsoft Office 2004, support this mechanism.

DEVONthink Personal automatically sets the title of the newly created snippet to the first line of text, so there's a good chance that you don't even need to rename it. New snippets are always created in the inbox. Also, DEVONthink Personal can automatically classify and file them by using its built-in artificial intelligence.

Possible uses:

- ▶ Collect recent news from your favorite web sites
- ▶ Keep important information from any source and your other project-related documents together
- ▶ Quickly create an info collection for a specific topic

Continue to read here:

- ▶ [Quickly capture a note using the Services menu](#)
- ▶ [Use the Dock menu](#)
- ▶ [Drag text clippings to the Groups panel](#)

INDEX FILES ON YOUR HARD DISK

Besides completely importing documents, DEVONthink Personal can also simply index files. When indexing files, DEVONthink Personal reads the contents of the file and stores it for internal reference, yet it always uses the external file for displaying the actual contents. Use indexing for easily accessing information stored in CD-ROMs, creating a library of all important documents regardless where they are physically stored, or for integrating files stored elsewhere with your documents in DEVONthink Personal.

Possible uses:

- ▶ Quickly access information from CD-ROMs
- ▶ Create a front-end for your document collection
- ▶ Integrate static documents with other project-related data

Continue to read here:

- ▶ [Import or index files](#)
- ▶ [Search your database](#)
- ▶ [Launch the original file of an index item](#)

MANAGE YOUR BOOKMARKS

With its integrated, document-based [web browser](#), DEVONthink Personal can be used as a bookmark manager. Organize all your bookmarks as bookmark documents and visit them simply by selecting them in split or three panes view. DEVONthink Personal loads the page and displays it in the view/edit pane.

If you want to open it in your default browser, simply $\wedge$ click (right-click) the bookmark and choose *Launch URL* from the contextual menu.

Possible uses:

- ▶ Manage your bookmarks
- ▶ Keep project-related web pages and other documents together
- ▶ Visit frequently used web sites in a convenient interface
- ▶ Integrate 'live' content from the web with your other documents
- ▶ Easily grab data from web sites and store it in DEVONthink Personal

Continue to read here:

- ▶ [Create a new bookmark document](#)
- ▶ [View 'live' and local HTML pages](#)
- ▶ [Drag URLs to the Groups panel](#)

TAKE NOTES

DEVONthink Personal is perfectly suited for taking notes and organizing them.

Use DEVONthink Personal's [Take Note](#) panel or its [Dock menu](#) to quickly create new notes; write them with all the advanced text editing capabilities of Mac OS X and find a place to file them in your database using the [Classify & See Also](#) button.

Possible uses:

- ▶ Write down ideas before they vanish
- ▶ Conveniently take phone messages
- ▶ Keep project notes and your other project-related documents together

Continue to read here:

- ▶ [Create new documents](#)
- ▶ [Quickly create new note using the Dock menu](#)
- ▶ [Use the built-in rich text editor](#)
- ▶ [Organize your data using Classify and See Also](#)

WRITE TEXTS AND OUTLINE PROJECTS

With its hierarchical group structure, organization, and navigation functions as well as its advanced text editing capabilities based on the Mac OS X text engine DEVONthink Personal is perfectly suited for writing text from notes to whole books.

Create new documents with just one click, find [related documents](#), and network them with Wiki-style or static cross-links. Because in DEVONthink Personal you are working with databases, you can switch from one document to another with just one click and manage even large projects with ease.

By [flagging](#) groups and documents DEVONthink Personal can also be used as a very simple outliner. Unlike other outliners, DEVONthink Personal uses documents as items and groups for items that have sub-items. Use it with the [Split view](#) to create an outliner look-and-feel.

Possible uses:

- ▶ Write notes, white papers, and letters
- ▶ Write book chapters and organize them
- ▶ Organize your ideas or projects in outlines
- ▶ Create a network of information for your projects or interests

Continue to read here:

- ▶ [Create new documents](#)

- ▶ [Use the built-in rich text editor](#)
- ▶ [Choose between various window layouts to match your work style](#)
- ▶ [Use the See also & Classify drawer](#)

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A complete listing of all commands DEVONthink Personal offers in the menu bar, the global Mac OS X *Services* menu, and the handy *Dock* menu.

THE APPLICATION MENU

The *DEVONthink Personal* menu is similar to the application menu in any other Mac OS X application. It contains commands for displaying the splash screen, opening the [Preferences window](#), accessing the *Services* menu, hiding and showing windows, and, of course, quitting the application.

ABOUT DEVONTHINK PERSONAL, ...

- **About DEVONthink Personal:** Shows information about DEVONthink Personal including the version number and licensing information.
- **Check for Updates:** Checks if updates for DEVONthink Personal are available. By default, DEVONthink Personal checks for updates automatically; change your update settings in the Preferences, [Update](#) pane.

Note: For the check for updates no information is uploaded to the DEVONtechnologies server. DEVONthink Personal only downloads a file listing the most current versions to your Mac. This option is not available if you have purchased

DEVONthink Personal on the Mac App Store. All updates are handled by the App Store application in this case.

INSTALL ADD-ONS

This command installs or reinstalls a number additional files and scripts.

Note: If you purchased DEVONthink Personal in the Mac App Store this menu item may not be available. To open the Install Add-Ons window, [click here](#) instead.

The following options are available:

- **DEVONthink Jot Widget:** Installs the [DEVONthink Jot](#) dashboard widget.
- **Safari 5 Extension:** The Safari 5 extension 'Clip to DEVONthink' lets you clip web pages to your database or add links with notes, similar to the ['Clip to DEVONthink' bookmarklet](#).
- **Google Chrome Extension:** Similar to the Safari 5 extension but for Google Chrome.
- **Firefox Extension:** Similar to the Safari 5 extension but for Firefox.
- **PDF Services:** Adds an alias of DEVONthink Personal to the 'PDF Services' folder so that you can 'print' directly from any application to your database. [See also p. 58ff](#)
- **DEVONthink Sorter Helper:** A helper application launching [the Sorter](#) when you log in.

Check your options and click the *Install* button to make DEVONthink Personal install or reinstall the necessary files and scripts into their respective locations. If necessary, this command also launches the AppleScript Utility for you so that you can activate the global scripts menu. See [chapter Scripts](#) for more information about how to use these scripts.

In addition, this command removes obsolete files such as scripts left over from previous versions.

Options for items that are already properly installed are disabled and marked as 'installed'.

PREFERENCES, TRASH, AND CACHE

- **Preferences:** Opens the [Preferences](#).
- **Empty Trash:** Moves the contents of the database trash to the computer's file system trash.
- **Empty Cache:** Empties the web browser cache. This frees up space and makes sure that all data will be freshly loaded when displaying a web page instead of using a cached copy.

Note: If Index-captured items are contained in the database trash when you use *Empty Trash*, the option *Also from disk* will become available. If chosen, it will send the externally linked files to the system trash, too. Caution is advised!

PURCHASE, ...

- **Check Upgrade Options:** Opens a web page that lists the upgrade options available for your copy of DEVONthink Personal.
- **Purchase License:** Opens the [DEVONtechnologies Online Shop](#) and puts DEVONthink Personal into your shopping cart. If this copy of DEVONthink Personal is already licensed you will be presented with the choice of buying an upgrade for your existing license or buying another full license.
- **Enter License:** Use this command to enter your licence code. Make sure you enter ALL the details EXACTLY as they appear in the licence code e-mail. It is best to use copy-and-paste for transferring name, organization, and licence code from the email message to the appropriate fields.

Note: *Enter License* changes into *License* and *Purchase License* into *Purchase License or Upgrade* as soon as you have entered a valid license code (and a paid upgrade exists). Depending on whether you have purchased your copy in DEVONtechnologies' online shop or the Mac App Store one or more options may or may not be available.

SERVICES

- The *Services* sub-menu gives your access to special commands published by other Mac OS X applications such as TextEdit or Safari, or by services extensions such as our own [WordService](#) or [CalcService](#). Also, DEVONthink Personal publishes its own services. [See also p. 22ff](#)

THE FILE MENU

The File menu contains all commands that deal directly with files in your volumes, databases, or files that can be imported, exported, or indexed. Also, the File menu contains commands for printing documents.

NEW WINDOW

New Window: Opens a new [main window](#) for an open database (if only one database is open no sub-menu is available). DEVONthink Personal windows present all documents and groups of a database in a Finder-like fashion, and are used to access all stored items. Some views also contain a view/edit pane for easy viewing and editing of documents.

IMPORT

Import: Imports files or complete folders from your volumes into the database. You can find a list of all supported file formats in the [appendix](#). If not stated differently, data is imported to the [default destination](#). Finder labels are honored when possible.

The flexible plug-in architecture of DEVONthink Personal allows other import modules to be added. DEVONthink Personal comes with the following default import plug-ins:

- **Bookmarks:** Imports bookmarks from [Camino](#), [Firefox](#), [Google Chrome](#), [OmniWeb](#), or Safari as bookmarks. Only new bookmarks are imported if you use this command again.

EXPORT

Export: This sub-menu allows you to export selected documents or groups to the file system. *File > Export > Files and Folders* will recreate the hierarchy you have built in DEVONthink Personal almost exactly; metadata files ('DEVONtech_storage') make sure that no metadata such as comments, URLs, etc. are lost. DEVONthink Personal reads these files when importing and so recreates your original data structure.

Identical to *File > Import*, the *Export* sub-menu provides additional export methods based on plug-ins. DEVONthink Personal comes with a variety of plug-ins for exporting documents in different formats as standard. Currently the following plug-ins are available:

- ▶ **as Rich Text (RTF):** Exports the selected items as one large rich text file (without embedded images, etc.)
- ▶ **as Rich Text (RTFD):** Exports the selected items as one large rich text file, including embedded images, etc. Technically, the result is a folder with the .rtfd name extension, which is treated by Mac OS X like a single file (Apple calls this a 'package').
- ▶ **as Text:** Exports the selected items as one large plain text file. You can choose the desired encoding.
- ▶ **as Word Document:** Exports the selected items as one large [Microsoft Word](#) file.
- ▶ **to iPod:** Exports the selected items as plain text notes to an attached [iPod](#) (3rd Generation or later, iPod touch and iPhone are not (yet) supported).
- ▶ **as Website:** Exports the selected items as standalone web site that you can upload to your web server and share with your colleagues. In the appearing dialog window, choose the desired template, text encoding, and whether DEVONthink Personal should convert diacritics and accented characters to HTML entities or not. File types that cannot be displayed in a web browser, e.g. iWork Pages files, are converted to PDF if possible. For the export, templates that you can modify yourself are used. [See also p. 84ff](#)
- ▶ **as Template:** Saves the selected document as a template. It can then be used to quickly create new documents using [Data > New > With Template](#). To remove a saved template or to organize your templates in sub-folders, visit the folder '~/Library/Application Support/DEVONthink 2/Templates.noindex' in the Finder, then create sub-folders, move items, rename them, or trash them.
- ▶ **Database Archive:** Creates a clean copy of the frontmost database and compresses it as a .Zip archive. Backup the copy to any medium or server

to keep your data safe from hardware or software failures.

INDEX, UPDATE INDEXED ITEMS

Index: Adds selected files to your database, but only as references, and not in their entirety. DEVONthink Personal indexes the contents of the file and uses this for classification and other content-related functions. Indexed items show a little arrow after their name. For unknown file types, this command creates a bookmark. You can also drag files from the Finder to DEVONthink Personal; hold down the ⌘ and keys to index them. This is similar to creating an alias in the Finder. Indexed groups are excluded from tagging by default and changes to an indexed document are immediately reflected in its OpenMeta metadata (and are so noticeable by external tagging applications).

Note: External indexed files or folders located in '/System/', '/Library/' or '~/Library/' are never renamed or deleted so that you cannot accidentally cause harm to the system.

Update Indexed Items: This command updates one or more selected groups or documents with their corresponding folders or files in the file system. If nothing is selected the enclosing group of the current group is used. It also reads changes made to the Finder or Spotlight comments of the to-be-updated files and applies them to their counterparts in the database. Finally, this command removes indexed items that have lost their external counterpart. It does not affect items moved manually to the group. Use *Update Indexed Items* to keep indexed groups and their originating folders in sync or to manually update an item that you have changed directly inside the database package when DEVONthink Personal was not running.

To create this connection between the item in the database and the folder or file in the file system, which is maintained by the *Path* field in the [Info panel](#), you have to freshly import/index your folder of choice.

Select the groups and documents and choose *File > Update Indexed Items* to import all files that have been newly added to the connected folders in the file system.

Note: The update for groups is one-way only, from the file system to the database, but: when you rename a document its file is renamed, too, and when you change the Spotlight comments of a document this is reflected in the file system as well.

PROPERTIES

Database Properties: Opens the [Database Properties panel](#) for the selected database (if only one database is open no sub-menu is available) that allows you to change properties such as database name, comments, and username/password. Also, you can tell DEVONthink Personal to open this database by default.

PAGE SETUP, PRINT

Page Setup: Sets your preferred page size.

Print: Prints the selected or front-most document.

THE EDIT MENU

The *Edit* menu contains all commands and options relating to editing. You'll find the classic Mac cut/copy/paste and find/replace commands here, as well as many more.

UNDO AND REDO

Undo/Redo: Takes back your last action or redoes it. *Undo* and *Redo* work for most actions.

CUT

Cut/Copy/Paste: Do exactly what they're supposed to do.

Copy URL: Copies the URL of the selected or front document to the Clipboard.

Copy Item Link: Copies a URL to the Clipboard that links to the selected or front item. This URL can be pasted into other documents in other applications to create a link to the item in DEVONthink Personal.

Paste with Current Style: Pastes text from the Clipboard into rich text documents, disregarding all styles from the clipped text. Useful for pasting text from other applications or documents with a style that differs from the target document.

Delete: Deletes the selected piece of text.

Complete: Tries to auto-complete the partial word before the insertion caret. This standard Mac OS X function uses the currently active dictionary, which you can change via the spell check panel ([see below](#)).

Select All/Deselect All: Selects or deselects the complete content of the front document.

DOCUMENT EDITING

Tags: Shows the [Tags](#) bar (if necessary) so that you can enter your tags immediately.

Split Document: Splits the current document (PDF, plain or rich text) at the insertion mark position.

PAGE EDITING

Insert Blank Page: Inserts a blank page into the PDF at the position selected in the [sidebar](#).

Delete Selected Page(s): Deletes the page(s) selected in the [sidebar](#).

Rotate Left/Right: Rotate a selected image or page left and right.

SUMMARIZE

Summarize: Summarizes the selected piece of text. Unlike Mac OS X's Summarize service, this command takes advantage of the built-in AI of DEVONthink Personal, and uses the complete 'knowledge' contained in the open databases for improving the results. The better your databases, the better the results.

FIND

Find: This sub-menu contains commands for finding and replacing text as well as for bringing DEVONthink Personal's database search field into focus.

► **In Database:** Brings the search field of the front window into focus.

- **Find:** Open the standard panel for finding text within a document.
- **Find Next/Previous:** Jumps to the next, or previous occurrence, of the last search term.
- **Use Selection for Find:** Copies the selected piece of text to the find Clipboard or into the search field of the find panel if it is opened.
- **Scroll To Selection:** Scrolls the displayed documents to the current selection.

Spelling and Grammar: Provides the standard Mac OS X functionality for checking a text for misspellings or bad grammar. To choose the language used for spell checking, or for auto-completion (see above), open the spell checker panel with *Edit > Spelling and Grammar > Show Spelling and Grammar* and choose your language of choice from the pop-up menu.

Substitutions: Show the standard Substitutions preference panel and switch the available options manually on and off: Smart Copy/Paste, Smart Quotes, Smart Dashes, Smart Links, Data Detectors, and Text Replacements. Data Detectors analyse shown text and make context-sensitive actions available, e.g. when you hover with the cursor over a phone number or postal address. Mac OS X 10.6 'Snow Leopard' or higher only.

Transformations: Use this sub-menu to make selected text all lowercase, all uppercase, or to capitalize every word.

Speech: Starts or stops speaking the selected piece of text.

Insert: Inserts special characters, the current date, and/or time or a picture into your text. Of course, you can only embed a picture into a rich text document, not into a plain text document.

Special Characters: Shows the standard Special Characters panel for inserting characters that you cannot enter directly with your keyboard.

THE DATA MENU

The *Data* menu contains all commands that deal directly with documents or groups. Here you'll find commands for creating new documents, labeling, classifying, or grouping them, and more.

NEW

New: This sub-menu allows you to create new documents directly from within DEVONthink Personal.

- **With Clipboard:** Creates a new document based on the contents of the Clipboard. Note: Some applications such as [Microsoft Word](#) put data in multiple formats into the Clipboard; DEVONthink Personal tries to select the most useful one, however, in some cases, sometimes grabs an image instead of text (like Microsoft Word). Workaround: Create a text clipping for the text, or paste it into a TextEdit window, then copy the text from there.
- **Plain Text:** Creates a new [plain text document](#).
- **Rich Text:** Creates a new [rich text document](#).
- **Script:** Creates a new AppleScript script.
- **HTML Page:** Creates a new [HTML page](#).
- **XML File:** Creates a new [XML document](#).
- **Property List:** Creates a new property list (for developers).
- **Bookmark:** Creates a new bookmark. Type the URL you like as well as a name for it; DEVONthink Personal automatically sets the value of its URL field in the [Info panel](#) accordingly. If you don't type in a name DEVONthink Personal looks up the page name on the Internet and sets it automatically for you.
- **Group:** Create a blank [group](#).
- **Smart Group:** Creates a new smart group, also known as 'saved search'. DEVONthink Personal opens the [Smart Group Editor](#) that lets you define your search criteria. When saved, the contents of the smart group is updated every time you display its contents.

New from Template: In addition to these standard document types DEVONthink Personal offers pre-defined and user-defined templates that you can use to quickly add new documents to your database. Select any template to add its contents to the current group.

You can add any document to the list of templates using *File > Export > as Template*.

Some of the pre-defined templates are so-called 'smart templates' or 'template packages'. They consist of folders containing files for every

supported language that takes care of choosing the right template variant for your language, adds them to your database, and modifies it, if necessary. Some smart templates add the current date, insert the clipboard contents, check if a needed application is installed, or even access your Address Book and fill in your personal details from your card. [See also p. 81ff](#)

Use *Open Templates Folder* to open the folder containing the template files in the Finder and *Update Templates Menu* to update this menu when you have added new templates or made changes to the existing ones. Use *More Templates* to [install additional templates](#).

OPEN

Open: Opens the selected document or group in a [separate document window](#). For groups, this command opens a second [main window](#) rooted to the selected group.

Open in Tabs: Opens the selected items in a new tab. You need have more than one item selected for this command to have an effect.

Open with >: Opens the selected documents in the application you choose from the sub-menu. You can edit the document in the external application, DEVONthink Personal automatically synchronizes the file when it is being saved to disk by the other application. If you have quit DEVONthink Personal in the meantime, use [File & Synchronize](#) on the document to update it.

LAUNCH, REVEAL, SHOW

Launch URL: Opens the file, folder, or Internet location indicated by the URL field in the [Info Panel](#).

Reveal: Reveals the location of the front-most document in either the same main window, if possible, or by opening a new one.

Show in Finder: Opens a new Finder window for the folder, including the front or selected documents. Naturally, this only works for documents referring to a file in the file system through the *Path* field in the [Info panel](#).

SAVE

Save/Save All/Revert To Saved: These commands save the front document, save all documents, or restore the front document to the version that was last saved.

LABEL AND MARK

Label: This sub-menu allows you to mark the selected groups or documents with one of seven labels, just as in the Finder. You can define the color and the text of the labels in the [Preferences, Colors tab](#).

Mark: This sub-menu allows you to mark the item as flagged/unflagged, locked/unlocked, and read/unread. Items marked as unread show an unread marker in most views. [See also p. 76ff](#)

DUPLICATE

Duplicate: Creates a duplicate of the selected items. The name of the new item ends in 'copy' and both items are shown in bold and blue because their contents are identical.

Replicate: Creates a [replicant](#) for the selected items. Unlike a duplicate or alias, a replicant is like a second phone book entry for the same person (aliases are little files containing a link to the original file). When you replicate a group or document in DEVONthink Personal, you end up with two replicants, not one alias and one original. Both items have the same name and are shown in red.

Merge: Creates one big document out of several selected ones. This works not only for text documents, but also for images, PDFs, sheets, and multimedia items. All the original documents are embedded in the resulting document and all tags are added, too. If the selection contains only images, PDF or PostScript documents DEVONthink Personal generates a PDF file, otherwise a rich text document. Document types that cannot be merged, e.g., bookmarks, are ignored. This command can also merge multiple selected groups/tags; here the first group is used as the destination.

THUMBNAILS AND CONVERT

Thumbnails: These commands create, remove, or update the thumbnails or custom icons for the selected items. Thumbnails for bookmarks can be created if the *Bookmarks* option in [Preferences, Media tab](#), is enabled.

Convert: These commands convert PDFs, sheets, HTML documents, RTF/RTFD documents, text documents, web archives, and all other documents for which a Spotlight metadata importer is available, to plain or rich text or to HTML. DEVONthink Personal never replaces the original document with a text version; instead, it creates a new document containing the extracted text next to the original item. The *Convert > To Rich Text* option tries to recreate the original layout.

GROUP

Group/Ungroup Items: Creates a new group containing all the selected items. This is similar to creating a new group and moving the selected items into it. This command also works in the [See Also & Classify](#) drawer. *Ungroup* does exactly the opposite; it moves all items contained in the selected group one level up and removes the then empty group.

See Also & Classify: Opens or closes the [See Also & Classify drawer](#) of a main window.

Auto Classify: This command analyzes the selected documents and tries to find the groups where they would fit best. If a document cannot be classified with certainty, DEVONthink Personal beeps and lists it in the [Log panel](#). If DEVONthink Personal finds more than one fitting group, it creates [replicants](#) in all groups the document fits into. This function works best with a large database that is already somewhat accurately structured.

Note: If the document you are auto-classifying has replicants, these are deleted and the document is only placed into the new locations. This prevents multiple replicants from being created when you are, for example, classifying this document again.

MOVE TO TRASH

Move to Trash/Move All Instances to Trash: Moves the selected items to the trash. If you have selected a replicated item, *Move All Instances to Trash* moves this item and all its replicants to the trash.

THE FORMAT MENU

The *Format* menu contains all the commands and options dealing with all aspects of text formatting. Here you'll find the standard font, alignment, and ruler commands, as well as very special DEVONthink Personal commands.

Note: Many commands in this menu only work with rich text documents, as plain text documents do not allow formatting (that's why they're called 'plain' text). Some formatting options are also available for editable PDFs and web archives.

FONT

Font: This sub-menu is responsible for controlling the font as well as the document background color (rich text documents only). Open the fonts panel with *Show Fonts*, then increase or decrease the font size of selected text with *Bigger* and *Smaller*, adjust the text styles and the document background color.

Copy the font formatting of a selected piece of text or the passage of text around the insertion caret with *Copy Font*. You can then apply the formatting to selected text using *Paste Font*.

Style: The commands in this sub-menu apply a certain style, such as italics, bold, or underlined, to selected text. Also, the commands give you access to some high-end font control like kerning, baseline shift, ligatures, and character shape (only applicable to Asian languages).

The most interesting part here is *Styles*, which opens the Mac OS X Styles Editor. You can step through all the styles used in the current document and add them to your favorites. Use the *pop-up menu* to select a saved style and, if you don't need it any more, delete it. You can use saved styles from the ruler (see below).

Note: If you think the user interface for the styles editor is less-than-wonderful, you're right. But don't blame us, it's Apple's design :-)

Alignment: Align paragraphs left, right, centered, or justified. Here, Asian or Arabic users can also change the direction of writing, if necessary.

Ruler: Show the ruler, which shows the tab stops and contains alignment and styles buttons; copy the current ruler (line width, indents, tab stops, etc.) and paste it somewhere else.

Learn more about the ruler and the Styles Editor [here](#).

HIGHLIGHT

Highlight, Highlight Color: In rich text documents, editable PDFs, and web archives use *Highlight* to highlight a selected piece of text as you would do with a colored pen on a piece of paper. To remove highlighting, select the highlighted piece of text and choose *Highlight* again. Use the *Highlight Color* sub-menu to choose your favorite highlight color.

SPACING

Spacing: This command is only available in rich text documents; the command allows you to adjust the line spacing of selected text. You can adjust the line height to an exact value or define a minimum and maximum height, adjust inter-line spacing, and define the space before and after a paragraph.

Note: Paragraph spacings are not added to those of the preceding or following paragraph; instead, the maximum spacings from both paragraphs are used to ensure a proper layout.

Link: Makes selected text a link to a URL (for example, to a web page or to an email address). This is a one-step command for writing the address into a rich text document, selecting the address, selecting *Make Link* (see below), and then changing the linked text to anything you want.

List: Creates a bullet list. Select your prefix, bullet style, and suffix in the dialog sheet and click *OK* to insert your list skeleton. In the list, press ← to insert new items and press → and ↑→ to indent/de-indent items just as you would do in any word processor.

Table: Inserts a new table into a rich text document and opens the table inspector panel. Use the table inspector to adjust the number of rows and columns, cell alignments, cell colors, border width, and color. Also, you can merge and split cells and create tables within a cell.

MAKE LINK

Link: Makes the selected text clickable and asks for a destination. Enter any valid URL you want the text to link to.

Make/Remove Link: Makes selected text clickable, or removes a link from the current selection. Where you are taken to when you click the link depends on the selected text:

- ▶ If the text was a valid URL, the URL will be the target of the link. Editing the link text later does not change the target. Use the *Edit Link* command of the contextual menu to edit the link target.
- ▶ Otherwise, DEVONthink Personal treats the link as a Wiki-style link. Clicking the Wiki-style link jumps to a document with exactly the same name as the linked text (or any document with a [Wiki alias](#) of that name). If there is no document of that name, clicking the link creates a new rich text document named after the linked text and pre-filled with the template you set in the [Preferences, Editing tab](#).

Make Plain/Rich Text: Converts a rich text document to plain text and vice versa. Converting a rich text to plain text removes all formatting, converting a plain text document to rich text applies default rich text font settings to the document.

INVISIBLES

Show Colors: Shows the color panel, e.g., for changing the foreground color of selected text in rich text documents.

Show Invisible Characters: Toggles display of invisible characters such as spaces, tabs, and line feeds. Shown invisible characters appear in light gray.

Allow Hyphenation: Enables or disables hyphenation for the current rich text document.

THE VIEW MENU

The View menu contains all the commands for modifying the way DEVONthink Personal displays groups and documents.

VIEWS

Using these commands, you switch between different layouts for [main windows](#):

- ▶ [List](#)
- ▶ [Icons](#)
- ▶ [Columns](#)
- ▶ [Split](#)
- ▶ [Three Panes](#)
- ▶ [Tags](#)

VIEW OPTIONS

Cover Flow: When checked, DEVONthink Personal displays the contents of selected groups in Cover Flow style in the view/edit pane in the Split and Three Panes views. Use it to quickly browse visually through multiple documents. You can double-click the front-most document to open it in a separate document window or you can drag it to other areas, windows, or applications.

Full Screen: Displays either the current document in a full screen mode optimized for reading and editing, or the frontmost window in full screen.

- ▶ **Document:** Shows the current document in full screen.
- ▶ **Window:** Shows the current window in full screen (OS X 10.7 Lion or higher only).

To return to the normal view, press `⌘F7` respective `⇧⌘F7` or the *Escape* key. You define the width of the document full screen view as well as plain text font, background color, and text color in the [preferences, Editing tab](#).

VIEW LAYOUT

Widescreen: Switches Split, Three Panes, and Tag views between standard and widescreen layout.

Show/Hide Details: Switches between displaying icons only or displaying icons together with detailed information such as kind, label, size, words, creation date, and modification date. Available in all windows showing an Icon view.

Show/Hide Tags: Shows or hides the [tag bar](#).

SORT AND COLUMNS

Sort: Sorts items in ascending or descending order by various criteria: name, kind, date added, creation/modification date, URL, path, word count, flag, label, width x height, duration, location (enclosing group hierarchy of the item), aliases, and Spotlight comment. Also, you can choose to sort items manually, *Unsorted*, and to ignore unlabeled characters when sorting elements. DEVONthink Personal remembers sort settings for every group separately and used when the group is displayed in its own main window.

Columns: This sub-menu lists all columns available in the current view and allows you to show or hide them individually. Use these options to show exactly the information you currently need.

The *State* column shows the state (flagged or unflagged). Clicking the flag or the empty spot for the flag toggles the flag. Unread items are marked as read when the 'unread' state is clicked.

Both *Sort* and *Columns* support a range of metadata fields next to DEVONthink Personal's own data fields.

EXPAND AND COLLAPSE

Expand and collapse all groups at once.

ZOOM, FULL SCREEN

Actual Size: Depending on the document type you can zoom the document to your needs:

- ▶ **Actual Size:** Displays the document at its actual size, calculated using the resolution of the screen and the resolution information of the image or PDF.
- ▶ **All Pixels:** Displays the document at a 1:1 ratio so that one pixel of the image equals one pixel on the screen (PDFs and images only).

- ▶ **Zoom In/Out:** Zooms in or out of the document.
- ▶ **Zoom to Fit:** Displays the document so that it exactly fits either the height or the width of the window/preview pane (PDFs and images only).
- ▶ **Zoom to Width:** Displays the document so that its width fits the width of the window or view/edit pane (PDFs and images only).

PDF DISPLAY, TEXT ALTERNATIVE

PDF Display: This sub-menu lets you adjust the way PDF documents are displayed.

- ▶ **Single, Facing Pages:** Show a multi-page as single pages or facing each other (as in a magazine).
- ▶ **Continuous:** When checked, shows the pages of the PDF as one long spread. When unchecked, only one page is shown at a time.
- ▶ **Book Mode:** When checked, facing pages start with one single page (the title page), then facing pages. When unchecked, they start facing.
- ▶ **Page Breaks:** When checked, pages are shown with a shadow around them. When unchecked, they are 'melted together'.
- ▶ **Crop Box, Media Box:** Crops the page to the crop or media box. By default, PDF pages are cropped to the crop box.
- ▶ **Sidebar:** Shows or hides the *Sidebar*.

Text Alternative: Toggles between a graphic preview of a document, e.g. generated by Quick Look, named the 'Best Alternative', and a text-only alternative, 'Text Alternative'. For some document types, e.g. email messages, the Quick Look preview does not permit you to click links or copy text; the text alternative allows this.

TOOLBAR OPTIONS

Hide/Show Toolbar: Hides or shows the toolbar of the front window.

Customize Toolbar: Lets you configure the toolbar of the front window.

THE GO MENU

The Go menu contains all commands for navigating the hierarchy of your DEVONthink Personal database. Use these commands to go backwards and forwards through your documents, or to move back to the top level of the group hierarchy.

TOP GROUP, ...

Top/Enclosing Group/Selected Group: Goes back to the top level of the group hierarchy, to the group enclosing the shown group (if any), or to the selected group ('hoist'). These commands are only useful when you have opened a group in a second [main window](#), so that the 'root' of the window is not the top group of database, or when you are using DEVONthink Personal in outline-style.

Back/Forward: Moves backwards and forwards through all documents/web pages you have visited by following cross-links or Wiki-style links.

First/Previous/Next/Last Document: Navigates to the first, previous, next, or last document of all documents in the current group. Useful when you have opened a document in a separate window and want to move to another document in the same group. Also works in [Search windows](#).

INSTANCES, HIGHLIGHTS

Previous/Next Instance: Navigates backwards and forwards through all instances of a [replicated document](#). Use these commands to find out where the other instances of a replicated item are. Alternatively you can use a [smart group](#) to find all documents that have replicants.

Previous/Next Highlight: Navigates backwards and forward through all highlighted passages within a document, regardless of whether these passages have been highlighted by a search run or manually using [Format > Highlight](#). Use these commands to visit all found text passages or highlighted passages in a document.

Page: Navigates to the page with the entered page number.

WORKSPACES

Workspaces save the content and positions of all open windows so that you can restore them later. This is, e.g., ideal if you are working with the same set of windows over and over again. Save them as a workspace and recall them whenever you need them again.

- ▶ **Add:** Saves the currently open windows as a workspace.
- ▶ **Edit:** Opens a window that allows you to edit saved workspaces. Click on a workspace name to change it, reorder by dragging, and delete with the . button.
- ▶ **Workspaces:** Restores to a previously saved workspace.

THE TOOLS MENU

The *Tools* menu contains the more sophisticated tools, such as the advanced search function, the concordance, the history panel, and the log, as well as commands for keeping your database healthy and for showing the Info and the Groups panel.

SEARCH TOOLS

Search: Opens the [Search window](#). Using the search function you can search your database in a variety of ways, from searching for a document by name to a full content search. Using its built-in AI, DEVONthink Personal also assists you in formulating the right query.

DEVONagent Pro: Opens [DEVONagent Pro](#), DEVONtechnologies' smart Internet research tool. If the current document has a URL attached, this URL is opened in DEVONagent's built-in web-browser.

PANELS

Show Info: Opens the [Info panel](#) which shows basic information about selected items. As it is a panel, selecting a new item updates the Info panel accordingly.

Show Properties: Opens the [document properties panel](#). View or edit the front-most document's properties such as author, subject, or keywords.

Show Groups: Opens the [Groups panel](#). You can use this panel to always have your group list handy, for example for dragging text clippings or documents from DEVONthink Personal or other applications to a group.

RESEARCH TOOLS

History: Opens the [History panel](#) for a selected database (if only one database is open no sub-menu is shown) that lists all documents in the selected database sorted by modification date. You can use this panel for quickly finding newly added documents or by their age.

DATABASE TOOLS

Like any database, DEVONthink Personal needs a bit of maintenance from time to time. All commands you'll need for database maintenance are to be found here.

Verify & Repair: Verify all database structures and repair them if necessary. Use this whenever you feel it is necessary. By default, DEVONthink Personal automatically verifies the database structure every time you open a database, and advises you to run this command when it finds significant errors. Orphaned files found during repair are placed in a group 'Orphaned files' in the top level of the database.

Backup & Optimize: Create an internal backup of the database and then optimize the database structure. Optimizing removes unnecessary internal elements from the database and rebuilds the internal structure to optimize the performance. DEVONthink Personal also creates internal backups on a regular basis depending on the settings in the [Preferences, Backup tab](#). Internal backups only back up the index structures in case the index gets corrupted. Please use an external backup software to create backups of your complete database including all documents.

Restore Backup: Restore an internal backup. Choose the backup you want to restore from the dialog window and click Open. You can identify backups by their creation date.

Note: Restoring a backup simply swaps the current database and the backup. The backup becomes the active database, the former database a backup. You'll never lose any data by using this command.

Rebuild Database: Completely rebuild the database by deleting the index and rebuilding it from scratch. This removes any structural problems. Depending on the size of your database, this can take from a few seconds to several hours. You can rebuild any database including the inbox.

SORTER

Shows or hides the [Sorter](#).

TAKE NOTE

Take Note: Opens the [Take Note](#) panel that lets you quickly enter a plain text note and add it to the [default destination](#).

THE WINDOW MENU

As in any Cocoa application, the *Window* menu lists all open windows of the active application and gives you access to commands for managing them.

WINDOW COMMANDS

Close, Zoom, Minimize: These three commands resemble the red, yellow, and green buttons of any window title bar, and consequently close the window, minimize the window to the *Dock*, or maximize the window. No magic here. Hold the key to change *Minimize* to *Minimize all*.

Close, Select Next/Previous Tab: Closes the active tab or moves the focus to the next or previous tab. [Tabbed browsing](#) needs to be enabled for these commands to work.

Bring All to Front: Brings all windows of DEVONthink Personal to the front. Hold the key to change *Bring All to Front* to *Arrange in Front*.

Window List: Select any open window from the menu to bring it to the front.

LOG PANEL

Log: Opens the [Log panel](#). The log lists error messages and warnings that occurred while importing new documents. It also opens automatically when an error occurs. You can save the log to a text file or clear it.

ACTIVITY PANEL

Activity: Opens the [Activity](#) panel. It shows all running processes and allows you to manually stop them if necessary.

THE SERVICES MENU

The *DEVONthink Personal > Services* menu allows access to special commands published either by other Mac OS X applications, such as TextEdit or Safari, or by services extensions such as DEVONtechnologies' [WordService](#) or [CalcService](#). Also, DEVONthink Personal publishes its own services in the *Services* menu.

DEVONTHINK PERSONAL SERVICES

DEVONthink Personal installs several services for copying selected text, summarizing text, capturing a web page, or looking up documents in the database.

Add to DEVONthink: Adds selected files, bookmarks, or images to your database. This service is e.g. available in the Finder's contextual menu.

Take Plain/Rich Note: Adds selected text from any application that support services (!) as plain or rich text to the global inbox. Taking a rich text note also copies images and clickable links. If the source document is a web page or a news feed, it tries to capture the address of the page or feed as well. This only works with applications that support this, such as Safari, [DEVONagent Pro](#), or [NetNewsWire](#).

Capture Web Archive: Captures the web page displayed in the front-most window of any WebKit-based browser (such as Safari or DEVONagent Pro) as a web archive to DEVONthink Personal's inbox. This menu item is only shown when available, e.g., when Safari is the active application.

Append Plain/Rich Note: Adds selected text as plain or rich text to the last note taken using the DEVONthink Personal Services menu items.

Lookup: Opens the [Search window](#) in DEVONthink Personal with the selected text copied as search term.

Summarize: Creates a new note in DEVONthink Personal's inbox with a summary of the selected text. DEVONthink Personal uses all documents in the open database for determining what's important and what is not. The summarization settings in the [preferences, Editing tab](#), define whether the summary shall be based on sentences or paragraphs.

Note: After installing DEVONthink Personal you need to log out and then log back in again for new services and their shortcuts to be recognized. If one or more DEVONthink Personal Services menu commands do not carry a shortcut, then maybe another application grabbed them. Mac OS X will assign the correct shortcut when no other application claims possession of the same key combination.

THE HELP MENU

The *Help* menu contains commands for opening the integrated help pages, the support assistant, or visiting the DEVONtechnologies website.

DEVONTHINK PERSONAL HELP

These commands open the integrated help pages that are equal to the document you're just reading or open the [release notes](#). In addition, they direct you to the [bookmarklets installation page](#)

SUPPORT ASSISTANT

Opens the support screen of the [Welcome to DEVONthink Personal](#) assistant where you can e.g. get support, retrieve your license code, request a trial extension, or update your details in DEVONtechnologies' customer database. You can also install additional scripts or templates from the assistant.

Note: If you have purchased DEVONthink Personal on the Mac App Store all options dealing with licenses or upgrades are not available.

DEVONTECHNOLOGIES

These commands take you directly to the corresponding pages on the DEVONtechnologies web site. Visit our home page or the lively [user forum](#). If you have a question or suggestion, send feedback directly to our development team.

THE DOCK MENU

The *Dock menu* appears when you click *DEVONthink Personal's icon* in the *Dock* with the $\wedge$ key pressed, or when you right-click it. On Mac OS X 10.5 'Leopard' you can also left-click and hold the mouse button for one second or longer.

DEVONthink Personal's dock icon also displays a badge with the number of new items, e.g., after adding new data via the [Services menu](#) the [bookmarklets](#), or [scripts](#). Longer tasks, e.g. importing, indexing, or running scripts, show a progress indicator on the dock icon, too.

For all Mac OS X applications, the *Dock menu* provides a selection of the commands of the [application menu](#).

- ▶ **<Window Name(s)>:** Brings any open window of DEVONthink Personal to the front.
- ▶ **Remove from Dock:** Removes DEVONthink Personal from the *Dock*. Only available if DEVONthink Personal was added permanently to the *Dock* and is not currently open.
- ▶ **Open at Login:** Adds DEVONthink Personal to your login items.
- ▶ **Show In Finder:** Reveals the DEVONthink Personal application package in the Finder.
- ▶ **Hide:** Hides all windows of DEVONthink Personal.
- ▶ **Quit:** Quits DEVONthink Personal.

Besides these standard commands, DEVONthink Personal adds a number of its own commands to the *Dock menu* to make them easily accessible whenever the application is running.

- ▶ **Import:** Imports new documents from the file system, same as [File > Import](#).

- ▶ **Index:** Indexes files in the file system, same as [File > Index](#).
- ▶ **New With Clipboard >:** Creates a new document based on the contents of the Clipboard. Same as [Data > New > With Clipboard](#). Choose the destination database and group from the sub-menu.
- ▶ **Take Note:** Opens the [Take Note panel](#).
- ▶ **Search:** Opens the [Search window](#).
- ▶ **Show/Hide Groups & Tags:** Shows or hides the [Groups & Tags](#) panel.
- ▶ **Show/Hide Sorter:** Shows or hides the [Sorter](#).

WINDOWS AND PANELS

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DEVONthink Personal communicates with you through a number of windows. These windows are used for displaying and manipulating groups and documents, finding information, editing metadata, analyzing text, or changing the properties of your database.

MAIN WINDOW

Most of the time you spend in DEVONthink Personal will be spent in a main window. Like Finder windows, main windows give you access to your groups and documents, while also allowing you to view and edit documents.

Open a new main window with [File > New Window](#). DEVONthink Personal also opens a new window when you open a database; do this by checking *Open New Window* in [Preferences, General tab](#).

The title of the window shows the name of document or group if one is selected as well as its icon. Drag the icon, e.g. to the Finder, to copy the document and click, with ⌘ pressed, the title bar to reveal the document's location within the database. Select an enclosing group to reveal it.

VIEWS

Different views present your information in exactly the way you need:

- ▶ **List:** Displays groups and documents as a list; groups can be expanded/collapsed by clicking the gray triangle in front of their name. Double-clicking items opens them in separate windows.
- ▶ **Icons:** Displays groups and documents as icons. Double-clicking items opens them in separate windows. For images, DEVONthink Personal displays a live thumbnail. Adjust the size of the icons using the slider at the upper right corner of the window, just below the toolbar. Use [View > Show/Hide Details](#) to switch between icons only and icons with details in a list.
- ▶ **Columns:** Displays groups and documents in columns and with a preview pane, similar to iTunes. Selecting a document displays it in the preview pane; selecting a group shows the items it contains in a new column to the right of it. Double-click the column resizer to make it fit automatically. Each column [can be sorted](#) individually.
- ▶ **Split:** Splits the window into an item list and a view/edit pane. To switch between vertical and horizontal split, use [View > Widescreen](#). The item lists all groups and documents of the database

and can contain one or more columns. By default, it shows only item names. Expand/collapse groups by clicking the gray triangle.

- ▶ **Three Panes:** Resembles the way Apple Mail displays folders, items, and contents. The pane on the left displays all groups, the top right pane displays the documents contained in the selected group, and the view/edit pane to the lower right shows the contents of the selected document and allows you to edit it if possible. Tip: When you click the *Home* button the toolbar, you will see also the files located in the root of your database.
- ▶ **Tags:** Shows all documents in a database for selected tags. Select a tag to show all items carrying this tag; select multiple tags (e.g. by selecting them with the ⌘ key held) to show documents carrying all selected tags. Select no tag to show all items. Delete tags by pressing the *Delete* or *Backspace* key; this moves ordinary tags to the trash and excludes group tags from tagging. New documents created in this view are either created in the group representing the tag or in the global inbox and are tagged with the selected tag. [See also p. 78ff](#)

To adjust the size of the different panes, move the mouse to the divider between two panes until it changes into a line with two arrows. Then, click and drag the divider to adjust the size of the panes.

ITEMS

DEVONthink Personal displays groups and documents, much as the Finder does. Select items with a single click, drag them with the mouse from one group to another. You can also drag items to the Finder or any other application, or drag folders and files from the Finder to DEVONthink Personal. You can also drag clippings such as text and images from any application to DEVONthink Personal and vice versa.

Press the ⌘ and ⇧ keys to link to the dragged item(s) instead of importing them to the database. Single-click items to rename them. Double-click items to open them in a separate document window

or in the external application that has created it (depending on the document type). For smart groups, double-clicking them in any view except *Icons* view opens the [Smart Group Editor](#) for them. Press the *Space* bar to preview the item using Quick Look; close the preview with the close gadget or press *Escape* or *Space* again to close it.

Colored item names, colored group icons, and special icons tell you whether an item is a duplicate or replicant, about its 'unread' status or what type of search a smart group uses.

- ▶ Empty groups are shown in gray.
- ▶ Duplicates are shown with their name in blue, replicants are shown in red. [See also p. 16ff](#)
- ▶ Icons of [feeds](#) or other unread items show an 'unread' indicator in the *State* column. [See also p. 42ff](#)
- ▶ Smart groups using dates are shown with a clock icon, smart groups using the 'unread' status use a unique icon, too.
- ▶ Regular groups are shown in blue, groups also used for [tagging](#) are shown in yellow with a 'tag' icon embossed.

In addition, icons indicate whether a item is locked, has an attached comment or script, or has been indexed instead of having been imported. [See also p. 78ff](#)

To view or edit the contents of a document or group, do the following:

- ▶ **List/Icons View:** Double-click the group or document to open it in a separate window. Hold the $\mathbb{W}$ key as you click to close the originating window at the same time (hoisting). This also works in the other views.
- ▶ **Vertical/Horizontal Split/Columns View:** Select the group or document. The view/edit pane shows the contents of the group or document. Click the triangle in front of a group to expand it, then select a document to view or edit it.
- ▶ **Three Panes View:** Select a group or sub-group, then select the document you want to view or edit. DEVONthink Personal shows the group or sub-groups content in the view/edit pane. Click the triangle in front of a group to expand it. When you select multiple groups or news feeds the upper right pane shows all documents contained

in all selected groups in one list, like in Apple Mail. This does not work for smart groups.

VIEW/EDIT PANE

The view/edit pane (not visible in icons and list view) shows the content of the selected document and allows you to edit it, if possible. You can edit plain text, rich text, and HTML pages.

Read more here about the various [document types](#) that you can view or edit in the view/edit pane.

INFO BAR

Just below the toolbar you'll find the info bar. For selected items it shows icon, name including location, kind, size, and modification date. If you're not sure of what kind a document is, this is the place to look.

Adjust the size of icons with the slider in the right side of the info bar.

TOOLBAR

The toolbar of DEVONthink Personal main windows carries many commands for manipulating the way the application displays information, as well as for manipulating selected items. Many of these items in the toolbar are simply shortcuts for menu commands. Here's a short list of the available tools:

- ▶ **Navigation:** Navigates to the top level of the database, or one level up. Useful when you have opened a second main window by double-clicking a group and now want to move up the groups hierarchy in this window.
- ▶ **Go To Document:** Selects the first/previous/next/last document. Only available in Three Panes view or in separate [document windows](#).
- ▶ **View:** Switches between the possible views. See above.
- ▶ **Actions:** Provides some commands for modifying the selected documents, similar to the *Action* menu in other views. Generally, the *Action* menu contains a selection of the commands also available via the contextual menu.
- ▶ **Quick Look:** Opens the standard Quick Look panel for the selected items.
- ▶ **Group +:** Creates an empty group.

- ▶ **Plain/Rich Text +:** Creates a blank plain or rich text document.
- ▶ **Link +:** Creates a new link document.
- ▶ **Mark Up:** Highlights selected text, underlines it, or strikes it through. Available for rich text documents, editable PDFs, and web archive.
- ▶ **Highlight:** Highlights the selected piece of text with the highlighting color selected in [Preferences, Colors tab](#).
- ▶ **Open:** Opens the selected documents in separate [document windows](#).
- ▶ **Open With >:** Opens the selected documents in an external application.
- ▶ **Launch URL:** Opens the Internet location stored in the URL field of the selected documents, for example, a web site URL in Safari.
- ▶ **Copy URL:** Copies the Internet location stored in the URL field of the selected document to the clipboard.
- ▶ **Delete:** Moves the selected documents to the trash.
- ▶ **Save:** Saves all changes to the currently edited document.
- ▶ **Import, Export:** Import imports new documents; Export exports the selected documents.
- ▶ **Reveal:** Reveals the location of the selected items in either the same main window, if possible, or by opening a new one.
- ▶ **Show in Finder:** Opens a new Finder window showing the selected items.
- ▶ **Print:** Prints the current or selected documents.
- ▶ **Info:** Opens the [Info panel](#).
- ▶ **Group/Ungroup Items:** Group creates a new group and moves all selected documents into it. Ungroup moves all documents contained in the selected groups one level up and then deletes the then-empty group.
- ▶ **Auto Classify:** Classifies the selected documents and moves them into the most appropriate group if possible.
- ▶ **Find (search field):** Lets you search your databases. Select your search options from the *magnifier pop-up menu*, enter your search term, and press *Return*. The pop-up menu also lists the last 25 used search terms. Check *Prefix while typing* to let DEVONthink Personal begin to search while you are still typing. The last word of the term is treated like being a prefix ('word*'). Add more characters to refine and to speed up the search and press *Enter* or *↵* to finish the search and to search for whole words only. [See also p. 32ff](#)
- ▶ **Find:** Opens the [Search window](#).
- ▶ **Bigger, Smaller Font:** Increases or decreases the font size.
- ▶ **Subscript, Superscript:** Makes selected text sub- or superscript.
- ▶ **Ruler:** Shows or hides the ruler for rich text.
- ▶ **Fonts:** Shows the standard Mac OS X Font panel.
- ▶ **Colors:** Shows the standard Mac OS X Colors panel.
- ▶ **Make Plain/Rich Text:** Converts the current text document to plain or rich text.
- ▶ **Highlighting:** Highlights selected text. The pop-up menu lets you select the highlight color.
- ▶ **Link:** Makes selected text a Wiki-style link. If the text is a URL, the link will point to that URL.
- ▶ **Edit Source, Show Page:** Toggles between source and page display of selected HTML documents.
- ▶ **Zoom:** Zooms in, zooms out, zooms to view width, or shows the document in 1:1.
- ▶ **Full Screen:** Shows the selected documents in full screen mode. Press *⌘F8* to return to windowed mode.
- ▶ **(Capture) Page:** Captures a web page as HTML code to either the current group or to the inbox.
- ▶ **(Capture) Web Archive:** Captures a web page as web archive to either the current group or to the inbox.
- ▶ **(Capture) PDF:** Captures a web page as a PDF to either the current group or to the inbox.
- ▶ **(Capture) Note:** Captures selected elements of a web page as a rich text document to either the current group or to the inbox.
- ▶ **DEVONagent:** Opens [DEVONagent](#). If the view/edit pane or frontmost window displays a web page, it opens the same URL in DEVONagent.
- ▶ **Backup:** Creates an internal backup of the database and then optimizes the database structure; same as [Tools > Backup & Optimize](#).
- ▶ **Verify:** Verifies the database structure; same as [Tools > Verify & Repair](#).
- ▶ **Send by Email:** Creates a new message in the default email application and adds the

selected items as attachments. Supported email applications are Apple Mail, [Sparrow](#), [Microsoft Entourage](#), [PowerMail](#), [Mailsmith](#), and [Postbox](#). If the selected item is an email message, the sender is automatically inserted as the recipient and the text of the original message is inserted instead of an attachment. Notes: Postbox is currently only able to send one selected file. Unsupported email clients (e.g. Thunderbird) can only send the plain text of one selected file.

- **Take Note:** Lets you take a [quick note](#).

Note: Not all of these commands are always available. You can customize the toolbar by selecting [View > Customize Toolbar](#) or by clicking with $\wedge$ pressed (right-click) the toolbar background and selecting *Customize Toolbar* from the contextual menu.

SHORTCUTS & MODIFIER KEYS

You can use a couple of shortcuts and modifier keys for group and document icons in both the item list and when displaying a group's content in the view/edit pane.

- **Tab:** Jumps to the first or next editable column.
- **Space:** Opens the standard Quick Look panel showing a preview of the selected items.
- **Command+drag-and-drop:** Copies items to the drag destination instead of moving it.
- **Command-Option+drag-and-drop:** Links/replicates items to the drag destination.
- **Command-Option+drag-and-drop:** Creates bookmarks for address cards dragged in from Address Book.
- **Shift-click:** Selects multiple items.
- **Shift-Left/Right/Up/Down Arrow:** Extends the current selection.
- **Option-double click or Command-Shift-O:** Opens selected documents/groups in a new tab or a new main window (depending on whether [tabbed browsing](#) is active or not) and closes the current window ('hoist'). Activate *Always open groups in a new window* in [Preferences, General tab](#).
- **Command-click:** Opens the target of a link in a new tab or separate window.
- **Command-Option-click (a cross-link or Wiki link):** Positions the insertion caret inside the link for editing.

- **Option-click (a word):** Looks for the clicked word in the database, like the contextual menu command *See [word]*.
- **Option-click (the triangle in front of a group):** Expands or collapses all groups that are contained within this group as well.
- **Left/Right arrow:** Expands or collapses the selected groups in Horizontal Split, Vertical Split or List views, or navigate to previous/next item in other views.
- **Option-Left/Right arrow:** Expands or collapses the selected groups and all their children in Horizontal Split, Vertical Split or List views.
- **Control-Tab:** Cycles through all panes.
- **Control-Shift-Tab:** Cycles through all panes in reverse order.
- **Up/Down arrow:** Navigates up and down in all views. Use $\uparrow$ to select multiple entries.
- **Space/Shift-Space:** Scrolls one page down or up, in non-editable views (for example, in a locked document).
- **Return:** Renames documents in main windows.
- **Escape:** Cancels renaming.
- **Backspace:** Deletes selected items.

CONTEXTUAL MENU

The contextual menu (which appears when you right-click or $\wedge$ click an item) offers a range of commands tailored to what you wish do with the clicked object (for example, a text passage).

Most of the commands offered by the contextual menu have counterparts in a main menu, so you'll recognize them immediately. However, to save menu bar real estate, DEVONthink Personal gives you access to some options only via the contextual menu.

- **New Window:** Opens a new main window.
- **Open Database:** Opens the selected database.
- **Close Database:** Closes the selected database.
- **Delete Database:** Closes the selected databases and moves it to the Finder's trash.
- **Empty Trash:** Empties the trash can.
- **Database Properties:** Shows the [Database Properties](#) of the selected database.
- **Add to Favorites:** Adds the selected item to the favorites.

- ▶ **Remove from Favorites:** Removes the selected item from the favorites.
 - ▶ **New Smart Group:** Creates a new smart group in the sidebar.
 - ▶ **Edit:** Opens the [smart group editor](#) (only available for smart groups).
 - ▶ **Delete Smart Group:** Removes the selected smart group from the sidebar.
 - ▶ **New:** Creates a new document.
 - ▶ **Open:** Opens a selected documents in a new window.
 - ▶ **Open in Tabs:** Opens a selected documents in a new tab.
 - ▶ **Open With:** Opens a selected documents with an external application.
 - ▶ **Launch URL:** Opens the URLs indicated by the URL field of the selected documents.
 - ▶ **Copy URL:** Copies the Internet location indicated by the URL field of the selected document to the clipboard.
 - ▶ **Copy Item Link:** Copies a unique URL referring the selected item to the clipboard. Paste this URL into any third-party application to directly reference an item in your DEVONthink Personal database.
 - ▶ **Show in Finder:** Reveals the item's file in the Finder.
 - ▶ **Move Into Database:** Imports the selected indexed item (and its children if necessary) into the database. Only available for indexed items. Use this command to consolidate your database.
 - ▶ **Move To External Folder:** Moves previously imported groups and documents to their enclosing, external, and indexed folder in the filesystem. Use this command to make all contents of a group indexed instead of keeping them in the database. Only available for imported items.
 - ▶ **Refresh Feed(s):** Manually refreshes the selected news feeds.
 - ▶ **Exclude from Tagging:** Excludes the selected groups from tagging.
 - ▶ **Move To >:** Moves the group or document to the group you select in the sub-menu. Note: Moving items to another database cannot be undone.
 - ▶ **Replicate To >:** Creates a replicant of the group or document in the group you select in the sub-menu.
 - ▶ **Duplicate To >:** Creates a duplicate of the group or document in the group you select in the sub-menu. Note: Copying items to another database cannot be undone.
 - ▶ **Label:** Changes the label of the selected items.
 - ▶ **Mark:** Marks the selected items as flagged/unflagged, read/unread, locked/unlocked and shows or hides the state of the items.
 - ▶ **Move to Trash:** Moves the selected items to the trash.
 - ▶ **Move All Instances to Trash:** Moves all instances (including replicants) of the selected items to the trash.
 - ▶ **Thumbnails:** Creates, updates, or deletes the thumbnails for the selected items.
 - ▶ **Convert:** Converts the selected items to other document formats.
 - ▶ **Group:** Creates a new group containing the selected items.
 - ▶ **Auto Classify:** Classifies the selected items and moves them to the group where they best fit into.
 - ▶ **Send by Email:** Creates a new message in the default email application and adds the selected items as attachments. Supported email applications are Apple Mail, [Sparrow](#), [Microsoft Entourage](#), [PowerMail](#), [Mailsmith](#), and [Postbox](#). If the selected item is an email message, the sender is automatically inserted as the recipient and the text of the original message is inserted instead of an attachment. Notes: Postbox is currently only able to send one selected file. Unsupported email clients (e.g. Thunderbird) can only send the plain text of one selected file.
 - ▶ **Sort:** Sorts the list of items to any available criterium.
 - ▶ **Empty Trash:** Empties the trash (only available for the trash).
- In the *Tags* view, the following commands are available:
- ▶ **Save Search:** Available in the right pane of the *Tags* view this command creates a smart group from one or multiple selected tags. Use it to select some tags and save the search as a smart group for convenient access.

Note: For your convenience, DEVONthink Personal also makes the [Services menu](#), available via the contextual menu.

DOCUMENT WINDOW

A document window is more or less similar to the view/edit pane of a main window. You open a document window by double-clicking a document in any view of a main window or by choosing *Data > Open* (or any of its equivalents in contextual menus).

Depending on the type of information the document contains, the toolbar of a document window offers different set of tools. Most of them are identical to their counterparts in the DEVONthink Personal main window toolbar.

See the [Documents](#) chapter for a detailed description of the various document types.

SEARCH WINDOW

Search windows allow you to search your database in almost every way possible and assist you with intelligent functions for broadening and adjusting your search terms.

SEARCH TERM

In the top part of the search window you find the search term field as well as the *Similar Words* button. To enter a search term and run the query with the default options, simply type your search words into the search term field and click the *magnifier button* (right of search field). Like in many other Mac applications, the pop-up menu (behind the magnifier icon at the left side of the search term field) gives you access to the last 25 search terms.

DEVONthink Personal uses Boolean operators, parenthesis, and quotes to allow complex structured search terms. Read more about operators and how to use them to write a search term in the [appendix](#).

To broaden or adjust your search words, enter a word and click *Similar Words* to show a list of all words in the database that are similar to the entered word either by spelling or by context. Choose one or more words (use ⬆ and/or ⌘ to select multiple words from the list) to use them as search words. Multiple selected words are combined using the OR operator (spelling) or AND (context). The word you've entered will be shown on the top of the list, so you won't lose it for your search run. This functions use all open databases for retrieving similar words.

SEARCH OPTIONS

The left side of the search window gives you even more control over the way DEVONthink Personal searches the database. Adjust these options to best fit your needs.

Search for: Choose what exactly you're looking for or select *All* to search all parts of a document:

- ▶ **All:** Searches all elements of a document.
- ▶ **Content:** Searches the content of a document.

- ▶ **Name:** Searches the name of a document.
- ▶ **URL:** Searches the URL field of a document.
- ▶ **Comment:** Searches the Comment field of a document.
- ▶ **Metadata:** Searches the metadata associated with a document.

Comparison: Make DEVONthink Personal treat regular letters and their counterparts with umlauts or diacritics equally. Check *Fuzzy* to make searches fuzzy (e.g. 'Hello' and 'Hullo' would both be found). Note: This option is only applied to words but not to wildcards.

State: Limits the results based on their status (flagged/unflagged). Choose *Any* to find results regardless of their state.

Unread: Limits the results based on whether they have been marked as read or unread. Choose *Any* to find results regardless of their read status.

Locking: Limits the results based on whether they are locked or not (on/off). Choose *Any* to find results regardless of their locking flag.

Label: Limits the results based on their label. Choose *Any* to find results regardless of their label.

Search in: Limits the scope of the search run to all open databases, a selected database, or a selected group.

Note: To search for all documents with a given status, locking state, or label, simply leave the query field empty and use the above options to define what you are looking for.

Advanced: This button lets you enter advanced search criteria in the same way you do for smart groups. Use this to search e.g. for tags or date ranges. The *Reset* buttons clears the set advanced criteria. [See also p. 48ff](#)

SEARCH RESULTS

After a successful search run, DEVONthink Personal lists all found documents below the search term field, and displays them in a list together with their score (relevance compared to the query),

their icon, location in the database, modification date, document kind, and size. Sort the list in any way you want by clicking the column titles, click them again to reverse the sorting order. Modify the shown columns using the contextual menu or [View > Columns](#). Point the cursor to a result and the appearing tooltip will show you the full title, location, and other metadata; click a document title once to rename the document.

Below the list of found documents, DEVONthink Personal gives you a preview of the documents you select in the list. If you cannot see the preview area, drag its handle up from the bottom of the window. Also, you can do almost everything you could do in any other DEVONthink Personal window, such as drag a document to another window (or Finder), or export them using [File > Export](#).

[See also/Classify](#) drawers are supported, too.

Due to limitations in Mac OS X's PDFKit, highlighting of occurrences of the search term in the document is not tied to words and so also substrings are highlighted.

SMART GROUPS

When you are satisfied with the search results you can save the query including all settings as a smart group. Click the *+ button* next to the search term field and enter a name for your new smart group. The new smart group that searches this database is created in the top level of the database.

TOOLBAR

The toolbar of the search window offers many tools that are also present in DEVONthink Personal main or document windows. Here's a short list:

- ▶ **Go:** Selects the first/previous/next/last item.
- ▶ **Actions:** Provides some commands for modifying the selected documents, similar to the action menu in other views. Generally, the action menu contains a selection of the commands also available via the contextual menu.
- ▶ **Open:** Opens the selected document(s) in separate document windows.
- ▶ **Open Externally:** Opens the selected documents in an external application.

- ▶ **Launch URL:** Opens the Internet location stored in the URL field of the selected documents, such as a web site URL in Safari.
- ▶ **Copy URL:** Copies the Internet location stored in the URL field of the selected document to the clipboard.
- ▶ **Group:** Groups the selected documents in a new group.
- ▶ **Delete:** Moves the selected documents to the trash.
- ▶ **Export:** Exports the selected documents.
- ▶ **Info:** Opens the [Info panel](#).
- ▶ **Print:** Prints the selected documents.
- ▶ **Zoom:** Zooms in, zooms out, zooms to view width, or shows the document in 1:1.
- ▶ **Full Screen:** Shows the selected documents in full screen mode. Press `⌘F8` to return to windowed mode.
- ▶ **DEVONagent:** Opens [DEVONagent Pro](#). If the view/edit pane or frontmost window displays a web page, it opens the same URL in DEVONagent Pro.

Note: Not all of these commands are always available. You can customize the toolbar by selecting [View > Customize Toolbar](#) or by ^ clicking (right-clicking) the toolbar background and selecting *Customize Toolbar* from the contextual menu.

SHORTCUTS & MODIFIER KEYS

- ▶ **Tab/Shift-Tab:** Switch focus between the search field and the search results.
- ▶ **Control-Tab:** Cycles through all panes.
- ▶ **Control-Shift-Tab:** Cycles through all panes in reverse order.

CONTEXTUAL MENU

You can manipulate the search results by right-clicking or clicking them with ^ pressed to open the contextual menu, which offers various additional commands.

- ▶ **Open:** Opens the selected documents in a separate [main window](#).
- ▶ **Launch URL:** Opens the documents or web pages pointed to by the URL field of the selected documents.

- ▶ **Copy URL:** Copies the Internet location stored in the URL field of the selected document to the clipboard.
- ▶ **Refresh Feed(s):** Manually refreshes the selected news feeds.
- ▶ **Reveal:** Show and select the document group.
- ▶ **Duplicate To >:** Duplicates the selected documents to the group you select from the sub-menu.
- ▶ **Replicate To >:** Replicates the selected documents to the group you select from the sub-menu.
- ▶ **Move To >:** Moves the selected documents to the group you select from the sub-menu.
- ▶ **Label >:** Changes the label of the selected documents.
- ▶ **State >:** Shows or changes the state of the selected documents.
- ▶ **Locking >:** Locks or unlocks the selected documents.
- ▶ **Move All Instances To Trash:** Moves all instances of the selected documents, such as including all replicants (if any), to the trash.
- ▶ **Group:** Creates a new group in the top level of the database and moves the selected documents there.
- ▶ **Send by Email:** Creates a new message in the default email application and adds the selected items as attachments. Supported email applications are Apple Mail, [Sparrow](#), [Microsoft Entourage](#), [PowerMail](#), [Mailsmith](#), and [Postbox](#). If the selected item is an email message, the sender is automatically inserted as the recipient and the text of the original message is inserted instead of an attachment. Notes: Postbox is currently only able to send one selected file. Unsupported email clients (e.g. Thunderbird) can only send the plain text of one selected file.

INFO PANEL

The Info panel, just like its counterpart in the Finder, displays additional information about a selected document or group, from icon and name to comments and other metadata.

Open the Info panel using the *i* icon from the window toolbar or by selecting [Tools > Show Info](#). The contents of the Info panel corresponds to the currently selected object, so you can leave it open all the time and it will always display the correct information for the selected document or group.

HEAD ELEMENTS

Icon and Name: Just like in the Finder, the top part of the panel displays the *icon* and the name of the selected object. To change the icon of the document, select it and paste any image you want over it. To change the name of the document, use the *Name* field below.

Locked: The *Locked* checkbox indicates if the object is write-protected. Check the checkbox to protect the document or group from being accidentally modified. Locked documents or groups show a little padlock after their name.

MAIN ATTRIBUTES

Name: Use this field to change the name of the object.

Aliases: Enter one or more words here, separated by semicolons, as alternative targets for Wiki-style links. Generally, Wiki links refer to the name of contents and aliases make this system even more flexible.

Path: This field contains the path to the file holding the document's data. It is non-editable. You can click the *@ button* to open the references file using the Finder. In general this is equal to using [Data > Open With](#) and choosing the default application.

URL: Smiliar to the *Path* field, the *URL* field is used to link the document to an Internet address or just anything else that can be reached by a URL. This field is used primarily by bookmarks, but you can also use it to connect a document to a web page.

To visit the web page click the *@ button* next to this field or select the document and use the contextual menu command *Launch URL*.

INFORMATION ELEMENTS

Size: Shows the size of the item. For groups and news feeds this field shows the size of all contained items.

Kind: Shows of what kind the selected document is (for example text, RTF, etc.)

Added: Shows the date when the object was actually added to the database.

Created, Modified: Shows the dates when the object was created and when it was modified the last time.

ADDITIONAL INFORMATION

This section lists metadata that has been stored together with the item. What information is shown depends on the file type as well as the individual document.

ADDITIONAL ELEMENTS

Exclude from ...: These checkboxes allow you to exclude this item from being used in classification, see also, search, or tagging. Use this to exclude, e.g., temporary groups from classification to increase the accuracy of the built-in artificial intelligence.

Label: Shows the label that this item has been assigned and lets you change it.

Tags: Shows the tags that this item has been assigned. You can also edit tags here. [See also p. 78ff](#)

Location: Shows the location of this item inside the database.

Instances: Shows how many replicants of this document or group exist in the database and how many duplicates DEVONthink Personal has identified. Click to show a pop-up menu listing all instances and duplicates and their enclosing groups. Select any item to reveal it.

Spotlight Comments: Stores any other information you want to attach to your document or group, similar to the Spotlight comments field in the Finder. Of course, the *Comments* field is searchable. DEVONthink Personal synchronizes the Spotlight comments in the Finder with this field in the database.

Note: You can modify the comments of multiple selected items at once as long as the comment of all selected items is either identical or empty.

DOCUMENT PROPERTIES

The Document Properties panel gives you access to all metadata stored for a selected document. This metadata includes but may not be limited to:

- ▶ Author
- ▶ Company
- ▶ Copyright
- ▶ Title
- ▶ Subject
- ▶ Keywords
- ▶ Comments

Depending on the document type you can edit or only view these properties. Also, more fields can be available depending on the document type.

HISTORY

The History panel, opened using [Tools > History](#), lists all documents in your database in one long list, such as without the groups hierarchy (by default sorted by modification date which reflects content modifications only but not name or metadata changes).

Sort the list by name, age, or file size by clicking the column titles (click again to reverse the sorting order), and by any other criterum using [View > Sort](#). Customize the columns using [View > Columns](#).

Of course, you can use drag-and-drop to move documents to other windows or the Finder and modify them using the commands in the [Data](#) menu as well as the contextual menu.

Use the History panel to quickly access recently added documents or to export all documents of a certain age.

GROUPS & TAGS

The *Groups & Tags* panel, opened using [Tools > Show Groups & Tags](#), gives you direct access to all open databases and their groups including the tags inside the special Tags group. Use it, e.g., to drag items directly to a group or tag or to rearrange groups. You can also apply menu commands to selected items, e.g. [Data > Open](#).

Depending on your [Preferences, General tab](#), the *Groups & Tags* panel floats above all other windows even in other applications.

TAKE NOTE

The Take Note panel, opened by hitting a hot key, from the toolbar, or the [Tools menu](#), allows you to quickly enter a note, choose the destination for the note, and add tags and a URL to it. If DEVONthink Personal can get the URL of the frontmost application, e.g. from Safari, it will also insert it automatically into the URL field.

Check *Rich Text* to take a rich text note. Use the [Format](#) menu to style your note.

Change the hot key for opening the *Take Note* panel in the [Sorter preferences](#).

Note: For this function DEVONthink Personal needs to be running. This may change eventually.

LOG

The Log panel displays warnings and error messages that occur, for example, when importing files and folders. It shows the date of the message, the affected file, and a short information about what happened.

You can save the list to a text file with the *Save* button, and clear the log with the *Clear* button. To sort the log, click the according column title

(click again to reverse the sorting order). Use the contextual menu or double-click the entry to reveal an affected file in the Finder.

Uncheck *Show log automatically* to prevent the log popping up automatically. You can open the *Log* panel at any time using [Window > Log](#).

Right-click or click with $\wedge$ held to perform additional commands on log entries via the contextual menu, e.g. to reveal a logged item.

ACTIVITY

The *Activity* panel shows a list of currently running background processes, e.g. downloading PDF documents and web archives (e.g. via bookmarklets or [Clip to DEVONthink](#)). You can manually stop them if necessary, e.g., to free computer resources.

PREFERENCES

The Preferences window, opened using [DEVONthink Personal > Preferences](#), contains all available options that you can modify to adapt DEVONthink Personal to your personal needs.

Because the preferences are so important, we have created a [separate chapter](#) for them.

DATABASE PROPERTIES

The *Database Properties* panel defines preferences which are directly related to the database and not to the application in general. Open the properties panel using [File > Database Properties](#) for every open database including the global inbox.

LOCATION

This part of the properties panel shows the location of the database package as well as additional options:

Location: Double-click any part of the database location to reveal it in the Finder.

Create Spotlight Index: Check to make this database available to Spotlight. Checking this option lets DEVONthink Personal create a folder in '~/

Library/Cache/Metadata' that Spotlight uses for accessing the documents in the database. If you feel that this folder got out-of-sync with the database, click *Rebuild* to completely recreate this folder from scratch.

When viewing Spotlight results in a window, make sure to have the *Show all file extensions* option in Finder's *Preferences, Advanced tab* unchecked. If this option is checked, the Finder displays the generic names of the metadata cache files instead of the name of the referenced document.

Starting with version 2.0.6 DEVONthink Personal adds information to the Spotlight metadata that make it possible to preview many file types directly from the Spotlight results window in the Finder. Supported are text and rich text (RTF and RTFD), image, movie, audio, PDF, HTML, XML, and web archive files. DEVONthink Personal needs to be installed on the machine viewing the Spotlight results. You may need to rebuild the Spotlight index for this functionality to become available.

Note: Rebuilding the Spotlight index can be, e.g., necessary after copying a database from one computer to another.

Exclude Groups from Tagging: Excludes all groups in this database from being used as tags. Ordinary tags can always be added to items using the Tag bar.

STATISTICS

This section displays some basic statistics on how many documents you have stored in your database, how large they are, etc.

NAME AND COMMENTS

Name: Enter a name for your database here. It will appear in the title bar of every [main window](#) for this database.

Note: This does not change the file name for the database package. You cannot change the name of or add comments to the database representing the global inbox.

Comments: Enter your own comments about the database here, e.g. a project description.

PROTECTION

To prevent other people from opening DEVONthink Personal and accessing your data, click on the *padlock button* to unlock the entry fields, enter a user name, and your private password, and then click on the *padlock button* again to lock your changes and hide the password.

Note: This is a simple password protection. DEVONthink Personal does not yet provide file encryption for enhances security. For better protection, create an encrypted disk image using Disk Utility and store your database on it.

ASSISTANT

The integrated *Assistant* combines a welcome screen with tips, tricks, and tutorials, installable extras, and a support page that guides you through the available support options.

WELCOME

This screen welcomes you when you start DEVONthink Personal for the very first time. It offers:

- ▶ An introduction screencast
- ▶ The option to subscribe the free DEVONtechnologies newsletter as well as a number of welcome tips
- ▶ The tip of the day
- ▶ The extra of the day

You can access all other screens of the assistant from here, too.

GET SUPPORT

The support screen guides you through the three common steps for troubleshooting DEVONthink Personal. In addition you can have your license

code resent in case you don't have it anymore, request a trial extension, update your details in DEVONtechnologies' customer database, or buy an upgrade or a second license.

TIPS AND TUTORIALS

Here you can always find the latest tips and tutorials that help you squeeze the best out of DEVONthink Personal. Tutorials can be slideshows describing basic tasks in DEVONthink Personal or videos (as they become available).

Both tips and tutorials are updated live from DEVONtechnologies' server so it's a good idea to check back from time to time. The latest tip or tutorial is also always mentioned on the welcome screen.

INSTALL EXTRAS

On the extras screen DEVONthink Personal lists all available extras that you can download and install from DEVONtechnologies' server:

- ▶ Scripts
- ▶ Templates
- ▶ Plugins

Browse the list of extras and install them with the *Install* button. The last line of the description shows where in e.g. the *Templates* menu the extra will show up after installation. Remove installed extras with the *Remove* button.

The extras are updated live from DEVONtechnologies' server so it's a good idea to check back from time to time. The latest extra is also always mentioned on the welcome screen.

Note: If one of these categories does not show up in your copy of DEVONthink Personal there might be no extras of this type (yet) available for DEVONthink Personal.

DOCUMENTS

In this chapter:

General	39
Plain and rich texts	40
HTML pages, web pages, feeds	42
Images and movies	43
PDFs	44
Office documents, email, and others	45

All documents are displayed in DEVONthink Personal in views. Each view features its own tools, contextual menu commands, and hidden keyboard shortcuts, as explained in this chapter.

GENERAL

All documents are displayed in DEVONthink Personal in views (not to confuse with the different layouts in main windows, also called [views](#)). Each view has its own tools, contextual menu commands and hidden keyboard shortcuts.

Currently, DEVONthink Personal features the following view types:

- ▶ [Plain and RichText](#)
- ▶ [Office and other documents](#)
- ▶ [HTML pages, Web pages, Feeds](#)
- ▶ [Images](#)
- ▶ [PDFs](#)

NAVIGATION BAR

At the top of the view/edit pane DEVONthink Personal shows a navigation bar that gives you access to some additional tools that deal directly with the contents of the document. Which tools are available depends on the type of the document.

- ▶ ◀ Navigates back the last visited document after following a link.
- ▶ ▶ Navigates back the next visited document after going back.
- ▶ ↻ Reloads the displayed page in a web view.
- ▶ 🔒 Locks or unlocks the item.

- ▶ 📄 Scrolls to the next page of the displayed document.
- ▶ 📄 Scrolls to the previous page of the displayed document.
- ▶ 📄 Switches to text-only mode.
- ▶ 📄 Switches from text-only mode back to the (standard) preview mode.
- ▶ 📄 Shows the [PDF sidebar](#) containing thumbnails of all pages.
- ▶ 📄 Hides the sidebar.
- ▶ 📄 Opens the [See also & Classify drawer](#).
- ▶ 📄 Shows a list of the most important words of the document.
- ▶ 📄 Switched the [tag bar](#) on and off.

The text-only mode can be useful to select text in items that are displayed using [Quick Look](#) or to view or edit the source code of an HTML document. In preview mode DEVONthink Personal uses Quick Look to show e.g. Pages documents in their original layout. Select any word from the 📄 menu to [show documents](#) also dealing with this keyword.

- ▶ **URL:** Shows the URL associated with the displayed item. Click to launch the URL in its default application. Hold the `⌘` or the `⌘` key to open the URL in a new tab if possible. Holding *Shift-Option* or *Shift-Command* opens the URL in a new tab and selects it.
- ▶ **Word Count:** Shows the number of paragraphs, words, and characters of the displayed text.
- ▶ **Page Count:** Shows the number of pages as well as the page number of the currently displayed page. Click the page number in PDF or PostScript documents and enter a page number to direct jump to that page.

TAG BAR

The Tag bar, which can be [shown or hidden](#), shows all tags associated with the document. Click the tag bar and type to add tags, select a tag and press the *Delete* or *Backspace* key to remove it. [See also p. 78ff](#)

When you type the name of a tag, DEVONthink Personal offers automatic completion. Choose the right option with the mouse or the arrow keys and press `↵` or *Enter* to accept it. Press *Escape* to use whatever you entered. Auto-completion prefers ordinary tags (tags represented in the Tags group) over groups used as tags. Press `→` to enter another tag.

Note: The Tag bar is also visible for multiple selected documents when all documents have the same tags attached. Use it to change the tags for multiple documents.

TOOLBAR

DEVONthink Personal can display documents in separate windows when you double-click the documents in a main window. Depending on the type of document, the tools in the toolbar can change. Even though not all tools are always present in the default toolbar for a particular view, you can easily add them by choosing [View > Customize Toolbar](#).

SHORTCUTS & MODIFIER KEYS

Besides shortcuts special to one view or another, many shortcuts work the same for all views (and the same as in most other Mac OS X applications).

- ▶ **Control-Tab:** Jumps between panes of split views.
- ▶ **Home/End:** Go to beginning of, or end of, any view.
- ▶ **Page Up/Down:** Scroll one page up and down in any view.
- ▶ **Space/Shift-Space:** Scroll one page up and down in displayed web pages or main views. Works also in images and PDF documents.

PLAIN AND RICH TEXTS

The view for plain and rich text documents is basically a built-in incarnation of TextEdit, and you use it in a very similar fashion. Of course, text views support the [Edit > Find >](#) commands and all options of the [Format](#) menu.

THE RULER

For rich text documents, DEVONthink Personal supports the standard ruler that the TextEdit engine of Mac OS X provides. Show or hide it with [Format > Ruler > Show/Hide Ruler](#).

The ruler contains the following elements:

- ▶ **Tab Stops:** Place tab stops with the mouse, then remove them by dragging them away from the ruler. Drag new tab stops (left aligned, centered, right aligned, or decimal aligned) from the repository at the right side to their desired positions. Move the left and right margins as well as the indent with the mouse.
- ▶ **Styles:** Select a predefined text style from the pop-up menu. To define your own styles, choose *Other* to open the Mac OS X standard style editor. In the style editor, navigate back and forth through the styles of your document or the stored favorite styles (use the radio buttons to switch between document and favorite styles). Click *Select* to select all occurrences of text with the displayed style in the document, click *Apply* to apply the style to selected text or click *Done* to leave the style editor. To add a style from your document to the favorites, click *Add To Favorites*; to remove a favorite, click *Remove From Favorites*.
- ▶ **Alignment:** Align the current paragraph (the one with the insertion caret inside) left, centered, justified, or right by clicking the according alignment buttons in the ruler.
- ▶ **Spacing:** Choose the desired spacing for the current paragraph from the Spacing pop-up menu. Choose *Other* to enter other values than the ones shown.
- ▶ **Lists:** Make the current paragraph a list item (indented and with a bullet or numbered) by choosing the desired list style from the *Lists* pop-up menu. Choose *Other* to define your own list style.

Note: A nice feature is a built-in 'mini outliner'. On any blank line in a rich text document (doesn't work for plain texts), type `⌘→` to create a bullet-point (Mac OS X shows dashes instead of bullets). Press `↵` for the next item, and so on. Additional `⌘→` will increase the indentation; a `↵` on a

blank list line will decrease it. It uses hyphens to indicate list items by default. Right-click to choose all kinds of list styles.

ATTACHMENTS

You can attach other documents to rich text documents simply by dragging them into the text. Technically the rich text document becomes a .rtfd package and the dragged file is saved as part of the package.

- ▶ Use the [contextual menu](#) to show an attachment's content in a Quick Look preview.
- ▶ Double-click attachments to edit them externally.

Note: Editing attachments requires OS X 10.7 Lion or higher. Also, you cannot attach files to plain text documents. You need to [convert them to rich text](#) before you can attach other files.

SHORTCUTS & MODIFIER KEYS

- ▶ **Shift-Left/Right/Up/Down Arrow:** Extend current selection.
- ▶ **Command drag-and-drop:** Copy selected text.
- ▶ **Command-Option drag-and-drop:** Insert a cross-link for groups or documents dropped into a rich text document. Dragging with ⌘ and ⌥ pressed files or folders from the file system to a rich text document creates links to them.
- ▶ **Command-Click:** Open clicked URL in the default application (for example, your default Internet browser) or in a new tab, depending on your [preferences](#).
- ▶ **Command-Shift-Click:** Opens a link in a new tab and selects it (only if tabbed browsing is switched on).
- ▶ **Command-Option-Click (1):** Places the insertion caret inside the text of a clickable link.
- ▶ **Command-Option-Click (2):** Opens a clicked cross-link or Wiki-style link in a separate document window.
- ▶ **Option-Drag:** Selects text using a rectangular selection ribbon.
- ▶ **Option-Click (1):** List all contents containing the clicked word in the [See Also drawer](#) (identical to the *See [selected text]* in the contextual menu).

TOOLBAR

The document windows toolbar is very similar to the one in DEVONthink Personal main windows, yet can be configured separately.

CONTEXTUAL MENU

- ▶ **Search with Spotlight:** Searches for the selected text using Spotlight.
- ▶ **Search in Google:** Opens your default browser and searches for the selected text in Google.
- ▶ **Quick Look Attachment:** Opens a Quick Look panel for the selected attached link or file (OS X 10.7 Lion or higher).
- ▶ **Copy Link:** Copies a link as such to the Clipboard (only available for selected links).
- ▶ **Edit Link:** Edits the destination of a selected link.
- ▶ **Highlight >:** Highlights the selected piece of text with the color you select in the sub-menu.
- ▶ **Insert >:** Inserts special elements into the text (such as a page break, the current date or a bullet). Same as the *Insert* sub-menu of the [Edit menu](#).
- ▶ **Insert Link To >:** Inserts a link to an item you select in the sub-menu (only available when no text is selected).
- ▶ **Look Up in Dictionary:** Looks the selected text up in Mac OS X's Dictionary.
- ▶ **Link To >:** Makes the selected piece of text a cross-link and links it directly to the group or document you select in the sub-menu.
- ▶ **Make Link:** Makes the selected piece of text a WikiLink. The destination of the WikiLink is a document with the same name as the selected text. If no document with that name exists, clicking the created link creates it using the template you have set in the [Editing Preferences](#).
- ▶ **Open Link:** Opens the selected link in the default browser or application (only available for a selected link).
- ▶ **Open Link in New Tab:** Opens the selected link in a new tab.
- ▶ **Open Alias:** Follows a selected link (only available for a selected Wiki-style link resolved by an alias). Aliases are defined for each item separately in the [Info panel](#).
- ▶ **Remove Link:** Makes a selected link simple text.

- ▶ **Search selected phrase:** Searches for the selected text as a phrase.
- ▶ **Set Title As:** Renames the document according to the selected piece of text (needs to be less than 256 characters).
- ▶ **Split Document:** Splits the document at the current insertion mark position.
- ▶ **Add tag [word]:** Tags the document with the selected word (only available if the word is not already a tag of the document).
- ▶ **See [word]:** Opens a drawer with documents related to the selected word.
- ▶ **See Related Text:** Opens a drawer with documents related to the selected text passage. Only available when more than one word is selected.

HTML PAGES, WEB PAGES, FEEDS

HTML views display web pages stored in the database or downloaded 'live' from the Internet, by using the Safari web browser engine of Mac OS X. Pages are rendered similar to Safari or any other WebKit-based browser such as [DEVONagent Pro](#).

DEVONthink Personal does not display news feeds. You can find news feeds support in [DEVONthink Pro](#) and higher.

HTML views support the [Edit > Find >](#) commands as well as the [See Also & Classify drawer](#). To edit the source code of an HTML document, use the [navigation bar](#) to switch from preview to plain text mode.

In editable web archives you can use, e.g., the highlighting commands from the [Format menu](#) or add the *Color* tool to the [toolbar](#) to change text colors.

SHORTCUTS & MODIFIER KEYS

- ▶ **Command-Click:** Open clicked URL in the default application (for example, your default Internet browser) or in a new tab, depending on your [preferences](#). Equals clicking a link with the third mouse button.
- ▶ **Command-Shift-Click:** Opens a link in a new tab and selects it (only if tabbed browsing is switched on).
- ▶ **Backspace/Shift-Backspace:** Go backwards and forwards through the visited web pages.

TOOLBAR

Separate HTML or web browser windows feature a default toolbar set that is more web-like than text document windows. As with text document windows, this toolbar can be individually configured. Naturally, the DEVONthink Personal offers only tools for HTML views that are useful in a web environment.

CONTEXTUAL MENU

- ▶ **Reload:** Reloads the page from the Internet.
- ▶ **Open ... in New Tab:** Opens selected element in a new tab.
- ▶ **Open Link in Browser:** Opens a link in your default web browser.
- ▶ **Open Link in DEVONagent:** Opens a link in [DEVONagent Pro](#).
- ▶ **Open Link in PhotoStickies:** Opens a link in [PhotoStickies](#).
- ▶ **Capture Link:** Adds the selected link to either the current group or to the inbox.
- ▶ **Capture Page:** Adds the current page as HTML document to either the current group or to the inbox.
- ▶ **Capture Web Archive:** Adds the current page as web archive to either the current group or to the inbox.
- ▶ **Capture Note:** Adds the selected text as a new note to either the current group or to the inbox.
- ▶ **Capture PDF:** Adds the current page as PDF to either the current group or to the inbox.
- ▶ **Capture Frame Address:** Adds the URL of the current frame to either the current group or to the inbox.
- ▶ **Capture Page Address:** Adds the URL of the current page to either the current group or to the inbox.
- ▶ **Copy Frame Address:** Copies the frame URL to the Clipboard.
- ▶ **Copy Image:** Copies the image to the Clipboard.
- ▶ **Copy Image Address:** Copies the URL of an image to the Clipboard.
- ▶ **Copy Page Address:** Copies the page URL to the Clipboard.

- ▶ **Open Image in PhotoStickies:** Opens the image in [PhotoStickies](#).
- ▶ **Copy:** Copies selected text to the Clipboard.
- ▶ **Highlight:** Highlights the selection in a web archive like with a felt marker. Using this command on a selection again removes the highlighting.
- ▶ **Set Title As:** Sets the name of the document to the selected piece of text (needs to be less than 256 characters).
- ▶ **Search Selected Phrase:** Searches for the selected text as a phrase.
- ▶ **Add tag [word]:** Tags the document with the selected word (only available if the word is not already a tag of the document).
- ▶ **See [word]:** Opens a drawer with documents related to the selected word.
- ▶ **See Related Text:** Opens a drawer with documents related to the selected text passage. Only available when more than one word is selected.
- ▶ **Update Bookmark:** Updates the URL of this document to the current one, e.g. after navigating to a sub-page.
- ▶ **Back / Forward:** Navigates back and forth the previously visited pages.
- ▶ **Capture Frame:** Captures the HTML code of the frame and saves it to either the current group or to the inbox.
- ▶ **Capture Image:** Captures the selected image and saves it to either the current group or to the inbox.
- ▶ **Capture Link:** Captures the link and saves it to either the current group or to the inbox.
- ▶ **Capture Note:** Captures selected text to either the current group or to the inbox.
- ▶ **Capture Page:** Captures the HTML code of the page to either the current group or to the inbox.
- ▶ **Capture Webarchive:** Captures the page as a web archive file including all necessary images for offline viewing and archival to either the current group or to the inbox.
- ▶ **Update Webarchive:** Updates the contents of a web archive file with the live version on the Internet (only available in web archives).

For PDF pages, more options become available:

- ▶ **Open with Preview:** Opens the PDF in Preview.

- ▶ **Automatically Resize:** When checked, the zoom factor adjusts to the width resp. height of the browser window.
- ▶ **Zoom Out, Zoom In, Actual Size:** Zooms in or out of the document, or displays it in its actual size.
- ▶ **Single Page, ...:** Displays the PDF as single or double pages and either page by page (use the *Next Page* and *Previous Page* to skim through the pages forward and backwards) or continuously.
- ▶ **Next Page, Previous Page:** Skims through the pages forward or backwards.

IMAGES AND MOVIES

DEVONthink Personal uses Mac OS X's core technologies to display images and movies and therefore makes a very nice image and movie viewer.

You can scroll larger images using the scroll bars, the arrow keys as well as the *Space* and *Shift-Space* keys.

EDIT PANEL

Double-clicking an imported image opens an edit panel that allows you to do some basic image editing. The modified image is saved as losslessly encoded TIFF file.

- ▶ Change the exposure.
- ▶ Set white and black point.
- ▶ Change gamma, saturation, contrast, and brightness.
- ▶ Adjust sharpness.
- ▶ Adjust sepia effect.

In addition it offers a number of predefined image effects and lists available metadata contained in the image file itself.

Images (and PDF pages) can also be rotated using the [Edit > Rotate](#) menu commands, the [toolbar](#), or the [contextual menu](#).

TOOLBAR

For images and movies, DEVONthink Personal provides a set of tools that allows you to zoom the picture to whatever zoom factor you like, or to view

the image in full screen mode. Use *Open Externally* to open the image in an external editor. Movies appear with the standard QuickTime controller.

Note: Editing an image stored internally in the database with an external editor does not modify the image data stored in DEVONthink Personal.

CONTEXTUAL MENU

- ▶ **Play/Stop:** Starts playing the movie or stops playing it.
- ▶ **Undo/Redo:** Revokes the last action or redoes it.
- ▶ **Cut/Copy/Paste:** Cuts, copies, or pastes the selected image or movie.
- ▶ **Copy Frame Link:** Copies a URL linking to the actual frame of the displayed movie.
- ▶ **Actual Size:** Zooms the image so that it appears as its real size, calculated from the actual pixels and the resolution information contained in the image.
- ▶ **All Pixels:** Zooms the image so that one image pixel equals one pixel on the screen.
- ▶ **Zoom In/Out:** Zooms in and out of the picture.
- ▶ **Zoom To Fit:** Zooms the image so that it completely fits into the view/edit pane or the document window.
- ▶ **Zoom To Width:** Zooms the image so that it appears exactly as wide as the view/edit pane or the document window.
- ▶ **Select/Deselect All:** Selects or deselects the movie.
- ▶ **Set As Thumbnail:** Makes the current frame the thumbnail of the movie. Only available when the movie is not playing.
- ▶ **Rotate Left/Right:** Rotate the image left and right. It is saved in the lossless TIFF format.

PDFS

PDF views are similar to image views, but come with some specialized options for viewing PDF documents. Also, PDF views support the *Edit > Find* commands.

SIDEBAR

The sidebar shows thumbnails of a pages of the PDF document. Click a thumbnail select that page and scroll to it; hold the ⌘ or ⌘ keys to select multiple pages. Reorder pages by dragging a page to the new position and use *Edit > Delete Selected Page(s)* to remove the selected page(s). Use *Edit > Rotate* to rotate PDF pages. Contextual menu commands are available, too, e.g. copy and paste.

You show and hide the PDF sidebar using the *Show/Hide Sidebar* button in the PDF's [navigation bar](#).

Note: Only real PDF documents are editable, converted (e.g. EPS, PostScript, or Adobe Illustrator files), Skim documents (PDF packages), and PDF previews generated by [QuickLook](#) are not editable.

ANNOTATING PDFS

You can use DEVONthink Personal to annotate PDF documents. To add or edit annotations, open the PDF document in a separate window (e.g. by double-clicking it). In the toolbar you will find all necessary tools:

- ▶ **Tool:** Switch between moving, selecting text, and selecting elements such as annotation post-it notes.
- ▶ **Annotate:** Select your annotation tool of choice: Ellipsis, rectangle, post-it note, text rectangle, and link.

To add an annotation, select your annotation tool, then 'draw' it into the page. Double-click the annotation to open the annotation panel which lets you fine-tune your annotation. Depending on the type of annotation you can change its attributes. Change the text color in the annotation panel; use the standard [Fonts](#) panel to change the font of a selected text annotation.

To move or delete an annotation, select it with the 'select elements' tool. Position it with the mouse. Press the *Delete* key or use *Edit > Delete* to remove it.

SHORTCUTS & MODIFIER KEYS

In addition to the general shortcuts for paging up and down in a PDF document mentioned in the [General section](#), PDF views also offers unique shortcuts.

- ▶ **Command-click:** Opens a link in a new tab and selects it (only if tabbed browsing is switched on).
- ▶ **Command-drag:** Scrolls the visible area with the mouse (Mac OS X 10.4 and later only).

TOOLBAR

The *Annotate* and *Tool* toolbar items let you quickly [annotate PDFs](#).

CONTEXTUAL MENU

- ▶ **Actual Size:** Zooms the image so that it appears as its real size, calculated from the actual pixels and the resolution information contained in the PDF.
- ▶ **Zoom In/Out:** Zooms in and out of the PDF.
- ▶ **Auto Size:** Resizes the PDF automatically so that it always fits the size of the view/edit pane or the document window.
- ▶ **Single Page/Facing Pages:** Displays the PDF either as one page or as facing pages (like in a magazine).
- ▶ **Continous:** When checked, DEVONthink Personal displays the pages of a mutli-page PDF like one long roll of paper. If unchecked, it displays the PDF page by page.
- ▶ **Previous/Next Page:** Jumps to the previous or next page.
- ▶ **Highlight:** Highlights the selection like with a felt marker. Using this command on a selection again removes the highlighting.
- ▶ **Set Title As:** Renames the document according to the selected piece of text.
- ▶ **Search selected phrase:** Searches for the selected text as a phrase.
- ▶ **Add tag [word]:** Tags the document with the selected word (only available if the word is not already a tag of the document).
- ▶ **See [word]:** Opens a drawer with documents related to the selected word.
- ▶ **See Related Text:** Opens a drawer with documents related to the selected text passage. Only available when more than one word is selected.
- ▶ **Rotate Left/Right:** Rotate the page left and right.

- ▶ **Copy Page Link:** Copies a URL to the clipboard pointing directly to the shown page of the document.
- ▶ **Open Link:** Opens the selected link.
- ▶ **Open Link in New Tab:** Opens the selected link in a new tab.
- ▶ **Delete Annotation:** Deletes the selected annotations.

The PDF sidebar also offers commands for working with single pages:

- ▶ **Undo/Redo:** Un-does or re-does the last action.
- ▶ **Cut/Copy/Paste:** Cuts, copies, or pastes a PDF page.
- ▶ **Copy Page Link:** Copies a URL that points directly to the selected page.
- ▶ **Split Document:** Splits the PDF at the selection into two documents.
- ▶ **Insert Blank Page:** Inserts a blank page into the PDF.
- ▶ **Delete Selected Page:** Deletes the selected page.
- ▶ **Rotate Left/Right:** Rotate a selected page left and right.
- ▶ **Select/Deselect All:** Selects or deselects all pages.
- ▶ **Copy Page Link:** Copies a URL to the clipboard pointing not only to the document itself but the actual page.

OFFICE DOCUMENTS, EMAIL, AND OTHERS

Documents that DEVONthink Personal cannot render natively are displayed using QuickLook. But while you have to press the *Space* bar in the Finder to open a QuickLook head-up display, DEVONthink Personal previews these documents directly in the view/edit pane like any other document format.

Among others, the following document types are shown though QuickLook:

- ▶ [iWork](#) documents (Pages, Numbers, Keynote)
- ▶ [Microsoft Office](#) and [OpenOffice](#) documents
- ▶ [Mellel](#) files (version 2.6 and higher)
- ▶ ...

For some document formats the preview allows you to select and copy text, for other formats it doesn't. If DEVONthink Personal is able to interpret and convert the document format you can use the Text

View/Preview button in the [navigation bar](#) to switch to a text view that allows you to select, copy, and drag text.

Note: The availability and, if available, quality of the preview as well as the possibility to select and copy text depends solely on the source application. Developers can embed a QuickLook-compatible preview directly into the files or they can write a preview plugin and add it to either the source application or have you install it separately in ~/Library/QuickLook. If a document that you want to view in DEVONthink Personal does not show a

QuickLook preview, please contact the maker of the source application and ask them to add QuickLook support.

TOOLBAR

For document previews based on QuickLook, DEVONthink Personal offers a number of toolbar items, e.g. for moving back and forth through the other documents contained in the same group or opening the document in its source application.

Use [Data > Open](#) to open the document in a separate [document window](#) instead of in its source application.

DRAWERS AND SHEETS

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DEVONthink Personal uses drawers to display the results of the Classify and See Also functions that help you file items or find relationships between items in the database. The Smart Group Editor appears in a sheet and allows you to create or modify a smart group (a.k.a. 'saved search').

SEE ALSO & CLASSIFY

The See Also & Classify drawer appears when you select exactly one document in a [main window](#) and then click the *AI button* (a small sorcerer's hat) in the [navigation bar](#) at the top of the view/edit pane. This button is only available in views that have a view/edit pane.

It is also shown when you use the contextual menu on selected text to show similar documents, e.g. *See [word]* or *See related text*, or when you select a topic from the *topics pop-up* menu in the document's [navigation bar](#).

To close the drawer, click the red *close button*.

When activated, DEVONthink Personal analyzes the contents of the selected document and compares it to all the data stored in the database. From this 'knowledge', it gives you one or both of the following lists.

CLASSIFY

The Classify function helps you file documents by making suggestions based on where you have filed other documents. The classify list shows into which groups the selected document would fit best. It also lists the location of the group and a graphical score that shows how sure DEVONthink Personal

is about its decision. The tooltip for any entry in the list shows the full title and location for it. This part is only visible when the *sorcerer's hat button* is used.

To move the document to one of the suggested groups, select the group and click *Move To*. Alternatively double-click the group. For your convenience, DEVONthink Personal preselects one or multiple groups if it very sure. Drag the group into any item list to move it, e.g. into a main window. Use the $\uparrow$ and $\mathbb{W}$ keys to select more than one target. This generates [replicants](#).

Note: Any replicants of the document you are moving are deleted. The document is only placed in the new locations which allows you to precisely classify the document again without having to manually clean up the old replicants.

SEE ALSO

See Also lists similar documents and so help you find information dealing very likely with the same subject than a given one. The see-also list shows documents that are similar to the selected one or to the selected text or topic (when you have used the contextual menu items or the document's topics pop-up menu). Similar to the [classify list](#), this list shows the path to the document and a graphical score of how sure DEVONthink Personal is about its decision. The tooltip for any entry in the list shows the full title and location for it.

To display a document in the drawer, select it. For your convenience, DEVONthink Personal always lists the original document at the top of the list, so that you can easily go back to the original document. Double-click a document in the drawer to open it in a [separate window](#); drag it into an item list to move it.

CONTEXTUAL MENU

Use the contextual menu on groups in the See Also & Classify drawer for more commands.

- ▶ **Open:** Opens the selected item in a separate [main window](#).
- ▶ **Open in Tabs:** Opens the selected item in a new tab.
- ▶ **Open With:** Opens the selected item in an external application.
- ▶ **Launch URL:** Opens the URL in the selected item's URL field.
- ▶ **Copy URL:** Copies the Internet location stored in the URL field of the selected item to the clipboard.
- ▶ **Reveal:** Shows and selects the selected item.
- ▶ **Show in Finder:** Shows the selected item in the Finder.
- ▶ **Move To:** Moves the selected item to the group you select from the sub-menu.
- ▶ **Replicate To:** Replicates the selected item to the group you select from the sub-menu.
- ▶ **Duplicate To:** Duplicates the selected item to the group you select from the sub-menu.
- ▶ **Label:** Changes the label of the selected item.
- ▶ **Mark:** Changes the check, lock, and read status of the selected item.
- ▶ **Move All Instances To Trash:** Moves all instances of the selected item to the trash, including all replicants (if any).
- ▶ **Group:** Creates a new group containing the selected item(s).

SMART GROUP EDITOR

The Smart Group Editor appears as a sheet when you either create a new smart group using [Data > New > Smart Group](#), when you right-click a smart group and choose *Edit* from the contextual menu, or when you double-click a smart group.

In this sheet you set up a new smart group or edit an existing one:

- ▶ **Search in:** Select where you want this smart group to search.

- ▶ **List of search predicates:** Build your list of search criteria (in search speak: 'predicates') here. See below.
- ▶ **Ignore Diacritics:** Check this to treat letters with diacritics, e.g. umlauts or accented characters, the same as their regular counterparts.
- ▶ **Fuzzy:** Check this to search 'unsharp', e.g. ignoring simple typos so that 'Merkel' and 'Merkle' are both found.

The list of predicates consists of a list of blocks, each one beginning with 'All' or 'Any', defining whether all (Boolean AND) or any (Boolean OR) of the contained predicates need to be true for the document to be returned as a result. Predicates themselves consist of the field to search (like: 'Content' or 'Tag'), the condition and the data that needs to be matched.

Note: In most predicates you can use wildcards, Boolean operators, phrases, and parenthesis, too. [See also p. 84ff](#)

Use the + and - buttons to add more predicates to your smart group or to delete them. Hold the $\square$ modifier key and click a ... button to create a 'compound predicate', also called 'branch'. Predicates can be in/outdented and rearranged via drag-and-drop.

By adding more lines to a search and choosing between 'All' and 'Any' you graphically create a nested Boolean query with ANDs, ORs, and parenthesis.

PREDEFINED SMART GROUPS

When you create a new database, DEVONthink Personal adds a number of predefined smart groups for your convenience:

- ▶ **Duplicates:** Lists all duplicates.
- ▶ **All Images:** Shows all images.
- ▶ **All PDF Documents:** Shows all PDF documents.
- ▶ **To Do:** Shows all documents with visible but unchecked state.

Note: Smart groups also filtering for date ranges are shown with a clock icon.

PREFERENCES

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The Preferences window, which you open by selecting Preferences in the [application menu](#), is the place to go to change all global settings for DEVONthink Personal. In addition to these settings, databases also have private settings in their [Database Properties](#) window that you open using [File > Database Properties](#).

GENERAL

Use the General tab to set the general settings for the user interface.

APPEARANCE

These options define some parts of the visual appearance.

- ▶ **Alternating row colors in views:** Check to color every second row in item lists differently.
- ▶ **Display number of items inside groups:** Check to show the number of unread and read documents contained in a group in parenthesis after group names. If this option is unchecked, news feed still show the number of unread items.
- ▶ **Highlight Internet links in views:** Check to show link documents in blue and underlined in item lists.
- ▶ **Mark duplicates and replicants in color:** Check to highlight duplicates in blue and replicants in red in most views. When unchecked duplicates and replicants are marked with file property icons.

- ▶ **Colorize icons with label:** Check to colorize the icon or thumbnail of items with the label color (like in Mac OS 9). When unchecked, label are displayed in the Finder's style.

INTERFACE

These options define some parts of how you interact with the user interface.

- ▶ **Hide 'Groups & Tags' panel when inactive:** Check to hide the [Groups panel](#) in applications other than DEVONthink Personal.
- ▶ **Open contents after using 'New with Clipboard':** Check to let DEVONthink Personal switch to newly added items after adding them using [Data > New > With Clipboard](#) or via the [Dock menu](#).
- ▶ **Always open groups in a new window:** When checked, double-click a group to open it in a separate [window](#). When unchecked, double-click it to make the group the new root of the current window. Use [Go > Top Group](#) and [Go > Enclosing Group](#) to go up the groups hierarchy again.
- ▶ **Retain view:** When the above option, *Always open groups in a new window*, is unchecked, this option keeps the actual view settings when you navigate the group structure instead of applying the group's individual settings.
- ▶ **Enable tabbed browsing:** When checked, click with ⌘ pressed a link in web, PDF or text views to open it in a new tab. When unchecked or the ⌘ modifier key isn't pressed documents are opened in the same view, the default application or in new windows.

STARTUP

Choose whether you would like DEVONthink Personal to open a fresh [main window](#) on startup, open all windows that were open when you quit DEVONthink Personal the last time, or do nothing. If *Open all windows that were open on quit* is selected, DEVONthink Personal also opens all databases that were open on quit.

Note: Even when you tell DEVONthink Personal to not open a window on startup, it will always open at least one window when you open a database.

FONTS

Use *List Views Font* and *Column View Font* to set the font DEVONthink Personal uses for displaying item lists in list and column views.

EDITING

The Editing tab defines all options that fine-tune DEVONthink Personal's text editing behavior, from the ruler units to WikiLink templates and summarization options.

GENERAL

- **General:** Check *Check spelling as you type* to have DEVONthink Personal spell check everything you write all the time. Check *Display PDF attachment of rich texts* to show PDFs attached to RTF documents. To use curly quotes instead of simple ones, check *Smart quotes*, and to use smart copy/paste check *Smart copy/paste*. Check *Data detectors* to use data detectors (Mac OS X 10.6 or later) in text and PDF views that detect e.g. addresses and phone numbers and let you act on them. Finally, *Text Replacement* (only available on Mac OS X 10.6 or later) let's you use the system-wide text replacement by default when editing text.
- **Ruler Units:** Select your personal preference for ruler units here, such as centimeters or inches, or points or picas.
- **Plain/Rich Text Font:** Select your preferred fonts for new plain or rich text documents. Note: By their nature, plain text documents are always displayed in the font selected here, whereas rich text documents can be styled any way the author wants.

FULL SCREEN

- **Full Screen:** Select your preferred font for reading and editing plain text files in full screen. By their

nature, rich text documents are always displayed using their own styles also in full screen mode.

- **Background:** Choose a background color for the full screen mode. This setting only affects the background of plain text files, and the border to the left and right of rich text documents. By their nature, rich text documents bring their own background color, and so don't use the color you set here.
- **Width:** Choose a width for displaying documents in full screen mode as a percentage of the screen width. Use this setting if the presentation in full screen is too wide for you on a large screen.

WIKILINKS

- **WikiLinks:** Check *Automatic* if you want to make every word that is also the name of another document or group in the database automatically link to the document of the same name (WikiLink). This mechanism can be restricted to not link to groups, as well as to only accept meshed words (for example, words with a capital letter in the middle like 'QuickTime'; this is the classic WikiLink method to distinguish between regular words and links). Check *Open new documents in separate windows* to open a new window when you click a WikiLink instead of simply switching to the linked document.
- **Template:** Enter a template text here. This will be used to create a new document when you make text a link that does not point to an existing document yet. You can use various [placeholders](#) to automatically insert text, the current date and time, for example.

SUMMARIZATION

Select whether you wish DEVONthink Personal to calculate summaries from sentences or from whole paragraphs.

IMPORT

Here you decide which file types DEVONthink Personal imports and how they will be named in the database.

FILES

These options define whether DEVONthink Personal imports files of a given type or not when you import folders using [File > Import](#) or via drag-and-drop.

- ▶ **<type>:** Select all the file types DEVONthink Personal shall recognize when importing folders. DEVONthink Personal always imports every file you import manually.
- ▶ **Encoding:** Choose the default encoding for plain text documents. Select *Automatic* to let DEVONthink Personal choose the best encoding.
- ▶ **Other file types:** Check to import files of a type unknown to DEVONthink Personal. QuickLook and Spotlight are used to access and display the contents of the file.

TITLES

Select how you want DEVONthink Personal to name imported documents; with file name extensions, without file name extensions, or by using localized display names (for example, on a German system the 'Applications' folder would appear as 'Programme').

NEW NOTES

Check *Select (and display) automatically* to automatically select and display the last note you have taken.

DESTINATION

Choose the [default destination](#) in which data coming in from [bookmarklets](#), [DEVONagent Pro](#), news feeds, [\(external\) scripts](#), and [services](#) is stored:

- ▶ **Select group:** A group selector is shown that lets you choose the destination. The group selector appears as a black panel floating over all other windows. It does not bring DEVONthink Personal to the front. Use it to select the group where you want to file the items and add [tags](#).
- ▶ **Global inbox:** The data is stored in the global inbox.

SORTER

The Sorter preference allows you to assign a hotkey for capturing a selection into the inbox of the Sorter as well as a hotkey for taking a new note, show the Sorter at login, and start or quit the Sorter manually. [See also p. 54ff](#)

AVAILABILITY, HOTKEYS

Check *Start Sorter at login* to start the Sorter immediately after you log in. Check *Visibility: Full* to make the Sorter tab fully visible or uncheck it to make the tab fade when the mouse pointer does not point at it.

To change the hotkeys for taking a new note or copying a selection, click the *Click to record shortcut* button, then press the hotkey that you want to use. Press the *Escape* key to cancel recording a new shortcut. When the Sorter is not running, this hot key opens the [Take Note](#) panel.

HIDER SORTER IN FULL SCREEN

This lists shows all fullscreen applications that Sorter is aware of. Add other applications using the + button and check or uncheck apps to make Sorter hide when this application is going to fullscreen mode.

Reset the full screen settings to make DEVONthink Personal 'forget' all remembered apps.

Click *Start* or *Quit* to start or quit the Sorter manually.

MEDIA

In the media preferences you tell DEVONthink Personal how to handle multimedia files, images, PDFs and other documents for which DEVONthink Personal can create thumbnails.

The following options are available:

- ▶ **Movies:** Check *Create thumbnails* if you want DEVONthink Personal to create thumbnails for imported or indexed QuickTime movies. Movie documents without thumbnails will appear with a generic icon, while movies with thumbnails show miniatures of their content.

Check *Play automatically* to play QuickTime movies automatically when you display them, and check *Loop* if you want to play the clips in a loop. Choose a background color for viewing movies.

- ▶ **Images:** Check *Create thumbnails* if you want DEVONthink Personal to create thumbnails for imported or indexed images. Choose a background for viewing images using the standard Mac OS X color chooser.
- ▶ **PDF & PostScript documents:** Check *Create thumbnails* if you want DEVONthink Personal to create thumbnails for imported or indexed PDF and PostScript files. Choose a background for viewing PDFs.
- ▶ **Create Thumbnails:** Check *Web Archives*, *Bookmarks*, or *Other files* if you want DEVONthink Personal to try to create thumbnails for these file types.

COLORS

Here you can name and choose the seven label colors DEVONthink Personal uses to mark documents and groups, as well as set seven colors you can use to highlight text.

WEB

The web preferences resembles the settings of most web browsers. Use them to define how DEVONthink Personal's displays [web documents](#) and 'live' web pages.

WEB CONTENT

These settings define how DEVONthink Personal treats some special web contents:

- ▶ **Enable ...:** Check these options to use installed third-party plug-ins, (such as Flash or RealPlayer plug-ins), run Java applets or JavaScript scripts contained in, or linked to, a web page.
- ▶ **Block ...:** Check *Block pop-up windows* to block pop-up windows which are often advertisements; check *Only automatic JavaScript windows* to block only pop-up windows opened by JavaScript. Uncheck this option if the web page you're visiting uses pop-up windows for actual content

(some web content management systems do this, for example). Check *Block zooming* to keep web sites from automatically zooming windows to full size, check *Block advertisement* to block common inline advertisements provided by some search engines.

- ▶ **Zoom text only:** Check to zoom only the text and uncheck to use Safari-4-style zooming.

IMAGES

These settings define how DEVONthink Personal displays graphics in web pages:

- ▶ **Display images when the page opens:** Check this option to display web pages with images. Just remember, when unchecked, you may miss some information.
- ▶ **Animate images, Loop animation:** Check these options to run web graphics animations and to run animated graphics in a loop or not.

ACCEPT COOKIES

Cookies are little text files with information that web pages store on your computer (for example, to recognize you as a returning customer). While most of them are harmless, you may want to have a bit more control over what is being stored on your hard disk.

- ▶ **Always:** Accept all cookies.
- ▶ **Never:** Don't accept any cookies.
- ▶ **Only from sites you navigate to:** Accept cookies, but only from web sites you navigate to (not from other sites, such as ad trackers).
- ▶ **Delete cookies on quit:** Delete all stored cookies when you quit DEVONthink Personal.

FONTS

Set the fonts you want to use for displaying web pages, separately for variable-width and fixed-width text.

STYLE SHEET

You can further control the way DEVONthink Personal displays web pages by applying a CSS style sheet that changes the rendering on-the-fly.

Click *Select* and choose your style sheet to apply it to DEVONthink Personal's integrated web browser. Note: This is for experts as it modifies how all web pages are displayed and can lead to undesired effects.

TEXT ENCODING

Select your desired text encoding for displaying web pages. *Automatic* tries to choose the best available encoding. If this does not work for you, choose a more appropriate text encoding for your language group.

BACKUP

DEVONthink Personal comes with a simple built-in backup function that backs up the database index on a regular bases. These options define how often DEVONthink Personal will back up its index.

The backup automatically duplicates all important database files and moves the duplicates into a folder(s) named 'Backup(.x)' within the DEVONthink Personal database folder/package. Select if you want to have the backup created never, daily,

weekly, or monthly and how many copies of the index to keep. Of course, you can create a backup at any time using [Tools > Backup & Optimize](#).

These options do NOT backup the whole database to a secure location but simply make sure there's a copy of the index files in case the index get corrupted. To back up your complete database use a third-party backup software or a backup solution such as Time Machine.

UPDATE

Change the settings in this tab to define when you want DEVONthink Personal to check for new versions (never, on startup, daily, weekly, or monthly). DEVONthink Personal only performs checks for updates when the computer is connected to the Internet.

Click *Check Now* to immediately check for a new version.

Note: Disable the check for new versions when your network connection is unstable and you experience very long delays when opening DEVONthink Personal. The *Update* pane is not available if you have purchases DEVONthink Personal on the Mac App Store.

WIDGETS, SORTER, BOOKMARKLETS

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DEVONthink Personal comes with a handy Dashboard widget that allows you to jot down notes and store them in your database. Bookmarklets make adding interesting web pages from Safari or [DEVONagent Pro](#) to DEVONthink Personal as easy as pressing a button.

DEVONTHINK JOT

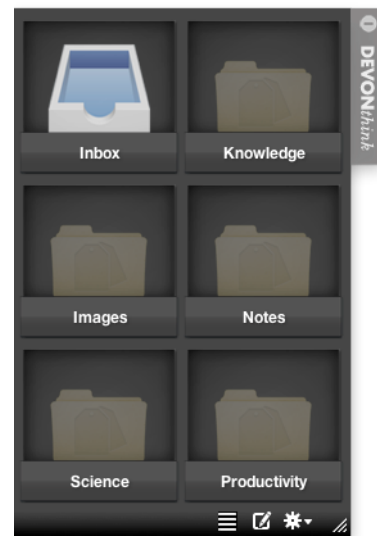
DEVONthink Jot allows you to take notes and send these to DEVONthink Personal's default destination right from the Dashboard.

The front of the widget is where you can type your note's message. Click into the writing area to make the insertion caret appear. Enter your [tags](#) below the note taking area, if needed. Click the *Take Note* button to save the note to your database.

You can also flip the widget by clicking the *i* button that appears when you move the mouse into the lower left corner of the widget. The back of the widget lets you choose your preferred font. This preference is also saved and will be used whenever you open the widget again. Click *Done* to flip the widget back to the front.

SORTER

The Sorter is a helper application that lets you add files or selected text or images to your databases even when DEVONthink Personal is not open. It shows as a little → attached to the left, bottom, or right border of the screen that serves as a drop target for files and clippings.



Like a real sorter in your post office, the Sorter consists of multiple (drop) boxes. The first box is always the [global inbox](#), all other boxes you can connect to any group in any of your databases. When you drop files or clippings onto a box, the Sorter files it in the connected group. Should the database containing the connected group not be available, e.g., because DEVONthink Personal is not open, the Sorter stores the dropped data until the database is opened and then flushes the contents of the box.

In addition you can use the Sorter to quickly add a note to DEVONthink Personal even when it is not open.

POSITIONING THE PANEL

To position the Sorter panel, drag the tab to any position along the left, bottom, or right borders of any connect screen except for the border where the Dock is located (even when it is hidden; this only applies to the screen that has the Dock). To open the panel, click its tab; to close it, click the tab again. Resize the Sorter panel with the resize gadget in the lower left or lower right corner, depending on whether the Sorter is attached to the left or right

side of the screen. The size of the boxes stays the same, enlarging or reducing the panel size adds more boxes or hides them.

Alternatively you can show the Sorter with a list instead of square boxes. Use the  and  icons at the bottom to switch between the two. You can set different sizes for both modes.

CONNECTING BOXES

To connect a box to a group, open the database of choice and drag the group, e.g. from the item list of a main window, to an empty box in the Sorter. The box is labeled with the group's name, the group's icon is shown as a ghost image on the background of the box, and its tooltip (that appears when you point at it with the mouse for more than one second) shows the name of the database containing the database as well as its path.

Drag a box by its title to move it to a new position in the Sorter's box grid; move it out of the Sorter panel to remove its connection.

Alternatively, use the *contextual menu* (opens when you right-click or click with $\wedge$ held) to open a window for the connected group in DEVONthink Personal or to remove the connection. Double-click a box to open the connected box in DEVONthink Personal.

USING THE PANEL

To add items to a Sorter box, simply drag the file or clipping to the Sorter's tab. The panel extends automatically and you can drop the item on the box that you want to use.

Dragging items to the Sorter copies them. Drag with $\mathfrak{M}$ pressed to move the item, drag with $\mathfrak{M}$ and $\rceil$ pressed to add only a reference of the item to DEVONthink Personal (index). For URLs dragged from a browser this creates a bookmark; hold $\mathfrak{M}$ and to create a web archive instead. Only files can be moved to the Sorter, folders and clippings are always copied. For items dragged from DEVONthink Personal itself the Sorter behaves similar to the [Groups & Tags](#) panel.

If the database the box is connected to is not available, the Sorter preserves the data for you. Move the mouse horizontally over the box to skim

through the dropped items, just like in iPhoto 'Events'. Drag the shown item to the *Trash* to remove it. Alternatively, use the *contextual menu* to remove it. When the database becomes available, the Sorter files the contents of the box automatically and plays a sound.

When the database is available, nothing shows up in the box but the Sorter sends all items directly to DEVONthink Personal and plays a sound.

ADDING NOTES

Switch between the sorter boxes and the take note panel click the  icon located at the bottom of the Sorter panel. Click the   or  icon to switch back to the sorter boxes.

On the take note panel choose the destination for the new note in the pop-up menu at the top of the panel (DEVONthink Personal offers all groups also available as sorter boxes) and enter title, URL, and your note. Add [tags](#) at the bottom if required. The Sorter uses the standard font and size set in DEVONthink Personal's [Preferences, Editing pane](#), for rich text. The text area also accepts drag-and-drop of plain and rich text clippings. Click the *Save* button to save the note.

ACTION MENU

The *Action menu* located at the bottom of the Sorter panel offers some commands that can be handy. Use the *Action menu* to open the [Sorter's Preferences](#), flush all boxes (automatically opens DEVONthink Personal and all databases that are needed), or quit the Sorter. When the Sorter is not open, use the Preferences or the [Dock menu](#) to show it again.

HOTKEYS

The *Take Note* and *Copy Selection* shortcut that you can set in the [Sorter Preferences](#) allow you to open the Sorter in [take note mode](#) or to capture a selection in another application and save it to the Sorter's inbox. The latter works similar to the Sorter's *Send To Inbox* command in the [Services menu](#).

SHORTCUTS & MODIFIER KEYS

Use the following keyboard shortcuts to use the Sorter efficiently:

- ▶ **Command-Option:** Creates a web archive instead of a bookmark when dragging a URL.
- ▶ **Command-M:** Minimizes the Sorter panel.
- ▶ **Command-S:** Saves the note (in take note mode).

TROUBLESHOOTING

Re-appears after log-in: If you have set the Sorter in its Preferences that it should not open automatically when you log-in but it still does so, open the System Preferences, Users section, Log-in Items tab. Remove the Sorter manually.

Edit 'Hide' settings: If you accidentally told the Sorter (not to) hide when an application goes to full-screen mode and now you want to change this behavior, do the following: First quit the Sorter, e.g. by using its *action menu*. Then, open the Terminal application (located in /Applications/Utilities) and copy the following line into a new window, followed by the ↵ key:

```
defaults delete com.devon-  
technologies.think-sorter  
UserSpecifiedFullScreenApplications
```

This makes the Sorter forget its hiding settings and you can set them anew.

BOOKMARKLETS & EXTENSIONS

DEVONthink Personal supports bookmarklets. Bookmarklets are special bookmarks that do not load a saved address but execute a little JavaScript application that, for example, adds a bookmark to the current page in your DEVONthink Personal database or that creates a web archive of a page.

Basically, bookmarklets use your web browser's bookmark function for creating handy shortcuts for application functions.

In addition, the functionality provided by the 'Clip to DEVONthink' bookmarklet is also available as an extension for Safari 5, Firefox, and Google Chrome.

INSTALLATION

To install a bookmarklet, drag it from the page to your web browser's bookmarks, preferably the *bookmark bar*. You can organize the bookmarklets like any other bookmarks but placing them into the bookmark bar keeps them handy at all times. To download the Safari 5, Firefox, or Chrome extensions simply use the buttons on the web page, then double-click them in the Finder or use your web browser's extension manager.

USING BOOKMARKLETS

Launch the web browser you have placed bookmarklets into, such as Safari. Next, load any page that you wish to archive or from which you want to clip text. When the page is shown, select the bookmarklet of choice in your *bookmarks bar* or click the button installed by the extension. Instead of loading another page, as normal bookmarks would do, the bookmarklet or extension will add the selected text or the whole page as note, bookmark, HTML code, web archive, or PDF to the destination you choose in the pop-up menu at the top of the panel.

The *Clip to DEVONthink* bookmarklet or extension is the most comfortable choice as it calls a special panel in DEVONthink Personal that lets you enter a title as well as a note and tags and lets you choose in which format you want to save the clipped data. The note is either saved as a text file or, for a bookmark, HTML document, web archive, or PDF is placed into the *comments* field of the created document.

SYNCHRONIZING

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DEVONthink Personal has the ability to synchronize its database with [DEVONthink To Go](#), its companion app for iPhone, iPad, and iPod touche devices. Keep all your important documents literally at your fingertips!

SYNCHRONIZING WITH THE DEVICE

DEVONthink Personal uses a special group named *Sync* to let you decide which data you want to share with your iOS device. The *Sync* group appears on the top group level of your database and has a special icon that makes it stand out from the other groups.

To select the items in your database that you want to take with you on your device, either move or [replicate](#) them into its *Sync* group. You replicate items e.g. by dragging them with the ⌘ and keys held.

You can add documents as well as whole groups to the *Sync* group. Smart groups are not yet supported and will be ignored during synchronization.

Make sure your device is on the same WiFi network than this computer. On the device open the DEVONthink To Go app. Tap the sync button on the app's home screen and follow the instructions.

If you have problems synchronizing your with device, [click here](#).

TROUBLESHOOTING

If you have problems synchronizing your with device, [click here](#).

If you have other problems with using the *Sync* group or the DEVONthink To Go app, please visit the [user forum](#). Should this not answer your questions or solve your problem, [click here](#) to contact the DEVONtechnologies support team.

VISIT THE APP STORE

If you do not yet have DEVONthink To Go installed on your device, [learn more](#) about it or [visit the App Store](#).

SCRIPTS AND THIRD-PARTY APPS

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Unlike DEVONthink Pro, DEVONthink Personal does not come with AppleScript abilities.

To conveniently 'print' and save documents as PDFs to your DEVONthink Personal database, simply add an alias to the DEVONthink Personal application to the directory '~/Library/PDF Services'. This does not give you the option to choose the name of the 'printed' file, as well as the destination group, but creates a PDF of the 'printed' document and adds this to DEVONthink Personal. For full PDF Services and AppleScript support please have a look at [DEVONthink Pro](#).

DROPLETS, FINDER PLUGINS, PDF SERVICES

PDF SERVICES

Using PDF Services, you can add your own actions to the *PDF* button of the print dialog windows in any Mac OS X application. DEVONthink Personal adds an alias of itself to the PDF Services folder.

Installation: To install the PDF Services alias select [DEVONthink Personal > Install Add-ons](#) and check *PDF Services* in the dialog window. Then click *Install*.

Printing to your database: To 'print' (save) a document to DEVONthink Personal, open it in its creator application (this could even be DEVONthink Personal itself). Then, do the following:

- ▶ Select *File & Print*.
- ▶ In the appearing print dialog window, click the *PDF* button at the lower left corner and select *Save PDF to DEVONthink Personal* (saves to the default destination) from the pop-up menu.
- ▶ Then, select the destination group for the document, if necessary, and click *OK*.

Note: This requires an installed printer to work properly.

TROUBLESHOOTING

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DEVONthink Personal was created with robustness in mind. But still, computer hard- and software can write defective data or destroy files. If you have troubles with your database, please refer to the methods below and also have a look at our [FAQ](#).

REPAIRING A DEFECTIVE DATABASE

DEVONthink Personal databases are packages containing of your files and the supporting AI-based index. In rare cases this index can get corrupted or out-of-sync. But as you files are stored separately this is not the world's end. If your database starts behaving stragely or if DEVONthink Personal itself finds inconsistencies when doing its start-up check it is time for some house-keeping.

STEP 1: VERIFY & REPAIR

As a first step use [Tools > Verify & Repair](#) to check your database's consistency and allow DEVONthink Personal to take all necessary steps to repair the found problems. If *Verify & Repair* was able to repair your database, use [Tools > Backup & Optimize](#) to optimize your database and have DEVONthink Personal create an internal copy of the index.

If *Verify & Repair* was not successful or your problems are not solved, proceed with the next step.

STEP 2: RESTORE FROM BACKUP

With its factory setting, DEVONthink Personal keeps up to two copies of the index files in case that the index is damaged beyond repair. You can change when and how many internal backups DEVONthink Personal keeps in the [Preferences, Backup tab](#).

To restore from a previously saved internal backup (means: a copy of only the index files), use [Tools > Restore Backup](#). DEVONthink Personal presents you with a list of all available backups. Choose the latest one and click *Open*. This swaps the current set of index files with the copy (the current set of index files becomes the backup, the backup becomes the current set) so that never any data is overwritten. Run [Tools > Verify & Repair](#) to check the consistency of this index version and if everything is in order use [Tools > Backup & Optimize](#) to optimize your database and have DEVONthink Personal create a fresh internal copy of the good index.

If the backed-up index files are also defective, try the other backups, if available. If all backups are broken, too, proceed with the next step.

STEP 3: REBUILD YOUR DATABASE

As your files and DEVONthink Personal's index are stored independently within the database folder the index can be rebuilt at any time without you losing too much metadata. To rebuild the database from scratch use [Tools > Rebuild Database](#).

During the rebuild process the complete index is re-created. Your actual files are not touched. All problems that occurred during this process are [logged](#).

Orphaned files: Orphaned files that could not be imported while repairing are logged and moved to the folder 'Orphans' inside the database folder. To rescue the orphaned files show the folder ~/Application Support/DEVONthink 2 in the Finder and move the files in the 'Orphans' sub-folder to a

save location, e.g. the Desktop, or directly re-import them by dragging them to DEVONthink Personal's Dock icon.

STEP 4: TIME MACHINE OR MANUAL RESCUE

If everything above failed it seems that your database is severely damaged. You have two options now:

- ▶ **Option 1:** Restore your database from your [Time Machine](#) backup, your [Jungle Disk](#), or any other backup medium you use for keeping an up-to-date backup of your documents. If you don't use Time Machine yet we strongly advise you to do so. External hard disks are cheap and Time Machine makes backing up your important files a no-brainer.
- ▶ **Option 2:** If you do not have a current backup of your documents you can rescue your files manually but you will lose your group structure. To manually copy your files from the defective database, show the folder ~/Application Support/DEVONthink 2 in the Finder. Copy the files in the 'Files' sub-folder, which are sorted by kind, to a save location, e.g. the Desktop. Then create a new database, re-import them and recreate your group structure.

STEP 5: CONTACT SUPPORT

If none of the above steps helped solving the problems you have with your database, please [contact DEVONtechnologies' support staff](#) with a precise-as-possible description of your problem.

DEVONTHINK PERSONAL CRASHES WHEN OPENED

If a database is heavily damaged it can happen that DEVONthink Personal crashed when opening the database or when starting up. In this case you cannot use the build-in mechanisms for recovering your data. But you can go back to one of the internal backups manually. With its factory setting, DEVONthink Personal keeps up to two copies of the index files in case that the index is damaged

beyond repair. You can change when and how many internal backups DEVONthink Personal keeps in the [Preferences, Backup tab](#).

To revert to one of the internal backups, quit DEVONthink Personal, then locate the database folder (~/Application Support/DEVONthink 2) in the Finder. Inside you will find one or more folders named 'Backup(.x)'. They contain copies of the index files (named '*.dtMeta'). To manually revert to one of the backups, copy the content of the backup folder (means: all '.dtMeta' files) to the top level of the database folder, replacing the existing, defective files.

When you have reverted to one of the backups try opening DEVONthink Personal again.

If this did not help, please [contact DEVONtechnologies' support staff](#) with a precise-as-possible description of your problem.

RECOVERING A LOST PASSWORD

If you have protected a database and you have forgotten your password, do the following to remove the password protection:

- ▶ Close DEVONthink Personal
- ▶ Locate the folder '~/Library/Application Support/DEVONthink 2/' in the Finder and open it
- ▶ Move the file 'Settings.plist' to the Trash

A future version of DEVONthink Personal will feature an industry-strength encryption.

PROBLEMS IMPORTING FILES

WHY DOES DEVONTHINK PERSONAL NOT RECOGNIZE MY FILES?

If DEVONthink Personal does not recognize a file make sure it has a proper file name extension. DEVONthink Personal needs a file name extension to determine the file type. Add the correct file name extension to your files (e.g., .txt for plain text files, .rtf for rich text files, .pdf for PDFs and .doc for Microsoft Word files. Then try again.

WHY DOES DEVONTHINK PERSONAL NOT DISPLAY MY DOCUMENT CORRECTLY?

If a document is not properly displayed, especially if it is a proprietary file format such as RagTime or Mellel, make sure that you either have a Quick Look plugin installed for this file format or that the application that created it is installed on your Mac (and supports Quick Look). DEVONthink Personal will be able to display the document if you can display the file also e.g. in the Finder by pressing the *Space* bar.

WHY DO SOME PDFS APPEAR AS IMAGES AND ARE NOT SEARCHABLE?

DEVONthink Personal cannot extract the text part of print- or editing-protected PDFs. When you import them, you get a log entry that tells you that the PDF file contains 'no text'. When you select these documents in DEVONthink Personal, the status bar shows 'image' instead of 'PDF+text'. A cheap solution for this problem is Michele Balistreri's [PDFKey](#). It allows you to print protected PDFs. Use PDFKey to 'print' a PDF file into a new PDF that is both printable and editable – and the latter allows DEVONthink Personal to extract the text for searching and classifying.

PROBLEMS USING SERVICES

WHY DO THE SERVICES MENU COMMANDS SHOW NO SHORTCUTS?

They should, however, the keyboard shortcuts for Services menu commands are only requested by the supplying application; Mac OS X itself assigns them, and therefore has ultimate control over which application or service gets what. If the DEVONthink Personal Services menu items do not have shortcuts assigned, it is very likely that Mac OS X gave them to another Services command or that they are used by the application that is currently frontmost.

In Mac OS X 10.6 'Snow Leopard' and later you can manage your Services in *System Preferences > Keyboard > Keyboard Shortcuts > Services*.

WHY DO THE SERVICES NOT WORK IN FIREFOX?

Services work only in Mac OS X applications based on the so-called Cocoa framework. Examples for Cocoa applications are, e.g. Mail, Safari, TextEdit, and, of course, all DEVONtechnologies applications. However, Firefox is a port of a Unix application not completely based on Cocoa. Therefore, it does not support Services. Try using [Camino](#) instead, a Cocoa browser based on the Firefox engine.

DEVONTHINK PERSONAL BEHAVES IRRATIONALLY

There is no software on this planet that has no bugs and if an application behaves irrational there is a good chance that you have just found one. But there also can be another cause: The application package could have become damaged, for example during an update or through a bug in a totally unrelated piece of software on your computer.

STRANGE APPLICATION BEHAVIOR

If something happens like the following

- ▶ menus disappearing or silently refusing to do anything,
- ▶ windows showing graphical artefacts,
- ▶ or applications to opening at all or with strange error messages,

please try to trash the application package. Then empty your web browser's cache, download the software in question again, and re-install it. In many cases this cures the problem.

If this does not help try deleting DEVONthink Personal's preferences files located in '~/Library/Preferences' and starting with 'com.devon-technologies.think'.

STRANGE BEHAVIOR RELATED TO DOCUMENTS

If the strange behavior only happens when you deal with one particular document it is likely that the document is damaged, was created in a very old or extremely new file format that is no longer or not yet properly supported, or uses a damaged or malfunctioning Quick Look plugin.

Please [file a support ticket](#) and attach the document in question, best packaged as a .zip archive, so that we can have a look at it and check if it is a problem in DEVONthink Personal or if it is just the file itself.

STRANGE BEHAVIOR OF TABS

With Zoom/2 installed, tabs in tabbed windows behave strangely, e.g. close by just hovering the cursor over the tab. Another effect of Zoom/2 are scrolling problems in e.g. iTunes. Disabling Zoom/2 solves the problem.

PROBLEMS SYNCHRONIZING WITH DEVONTHINK TO GO

If you cannot properly synchronize your database with DEVONthink To Go on your device, please check the following:

- ▶ Are both device and Mac properly connected to the same WiFi network?
- ▶ Have you moved, replicated, or copied documents or groups to the Sync group? Note that smart groups are ignored during synchronization.
- ▶ Have you checked your database on the device on the database selection screen?

If you still have problems with synchronizing, please first consult the [Frequently Asked Questions](#), and visit the [user forum](#). Should this not solve your problem, [click here](#) to contact the DEVONtechnologies support team.

FAQ

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Do you have questions regarding our licensing policy, our products in the Mac App Store, or specific questions about DEVONthink Personal?

GENERAL QUESTIONS

Do you have any job opportunities? Yes, we may. Please visit our [Work @ DEVONtechnologies page](#) for more information about current open jobs at DEVONtechnologies.

Can I be a beta tester? Maybe. Our beta tester selection process is very deliberate; we try and select our beta testers carefully so that we're not wasting anybody's time, yours and ours. We're looking for people who can provide us with feedback quickly and clearly, who use different hardware and software from our other testers, and who are willing to send us their personal data if it's needed for debugging.

If you want to be a beta tester, the best way to catch our eye is to be active in our user forums. We often ask active participants on the user forums if they can help us test particular features and new products. You can, of course, simply [contact us](#).

Is the documentation available in my language? The online and PDF documentation is only available in English at the moment. Localizing documentation and other text-intensive materials to Deutsch, Francais, etc. is cost-intensive and error-prone so that we have decided to concentrate our resources on developing stable, robust, and feature-rich software. We will have localizations of the online help etc. as soon as we feel we have the necessary resources.

Where does the name DEVONtechnologies come from? "Devonian (after Devon County, England), the geologic period from 410 to 360 million years ago. Also called the Reptile Age or Age of Fishes. First amphibians appeared on the land, that until then was only inhabited by trees and other plants — it was the departure into a new age." Named after the Devonian period, [the DEVONtechnology](#) marks the departure into a new age of data processing.

Note: [Ray Troll](#) has even created songs and other art about this extremely important evolution step.

RELEASE SCHEDULES, MAC OS X, AND WINDOWS

When is the next release coming We try not to announce precise timelines or feature lists for future releases, as we are a small software company with limited development resources; if one of us should happen to get the sniffles, or if there are other outside factors we need to devote our limited time to, it can easily impact our intended development schedules.

In planning releases, we try to strike a balance among:

- ▶ responding to customer requests,

- ▶ the needs of our partners,
- ▶ supporting new operating systems features,
- ▶ providing consistent features across the product line,
- ▶ working efficiently within the structure of the code, (similar features often get handled at the same time),
- ▶ various business needs.

We cannot make any assumptions on how those various factors will impact our daily workflow; in fact, it's often impossible to predict the final release date accurately when we start new projects. We try to plan our releases with a long term perspective so that they ultimately serve the needs of our customers, even if they don't necessarily get in everyone's favorite feature request every time.

Why are your applications not compatible with my pre-release version of Mac OS X? In the past, we've noted that compatibility issues with a new major release of the operating system are usually resolved by Apple in the final stages before its release, and don't require any action on our part. If you are already using a pre-release version of Mac OS X, please check if our applications work with a newer pre-release, or wait until it reaches the release candidate status. We will then make all necessary adjustments for making our apps run on the first official release of the new version of Mac OS X.

Any chance of a Windows versions of your products? We're very committed to Mac OS X and the superior Cocoa environment. For most of our applications, porting them to Windows would take longer than it would to rewrite them from scratch on the Mac. If you need to use Windows software but still don't want to miss our products consider [running Windows on a Mac](#).

PURCHASING

How do I purchase an upgrade? Please use [DEVONthink Personal > Check Upgrade Options](#) to find out what you need to upgrade and how much the upgrade is for you. If this option is not available in your copy of DEVONthink Personal this application might not be upgradable. Please visit the [Upgrade Assistant](#) on our web site instead.

What is your policy on software updates? Usually, all minor updates ('dot updates', such as version 1.2 to 1.3) to our applications are free and require neither purchasing an upgrade nor requesting a fresh license code. We charge for major upgrades, though, such as version 1.x to 2.x. If you purchased your license in our online shop within a reasonable time frame before a paid upgrade release (between 30 days and 6 months, announced on our website), we will provide you with a free upgrade. If you purchased this application on the Mac App Store [click here](#).

Can I get the bundle discount also later? Bundles are cheaper than multiple single licenses because a bundle means less fees for the shop provider. But we grant the bundle discount under certain circumstances. Please [contact our sales staff](#) if you purchased one of the bundled products within the last two weeks.

Do you give a discount to students and educators? Yes, we give 25 percent off the regular price of DEVONthink, DEVONagent, DEVONnote and the Infoworker's Bundle to students and educators. We also give volume discounts to institution or faculties. Please visit our [Students, Educators and NPOs](#) page.

Do you offer NPO licenses? Yes, we offer free licenses to non-profit organizations (NPOs) in the sense of charities. [Learn more about our NPO program](#).

Can I use your software on multiple computers? Yes, our license explicitly allows one and the same person to use our application non-simultaneously on multiple Macs. So, for example, if you install one of our products on a laptop, your office Mac, and your home Mac, you may do so as long as you only use one of them at a time.

I have no credit card. How can I purchase your software? We are selling currently through the online sales agent [Share*It](#) to keep our administration as lean as possible. If you don't have a credit card, you can also pay via PayPal or by purchase order, wire transfer, or even cash. See our [online shop](#) for more details.

In addition we are also selling some of our products through the Mac App Store. Please open the App Store application on your Mac to learn more about which payment options Apple offers.

Can I have more time for evaluating your apps? No problem. We happily give out 30 day licenses for evaluation purposes. Choose *Help > Support Assistant* to request a 30 day trial extension. This option is not available e.g. in DEVONagent Express.

Why haven't I received my license code(s)? If you have purchased your license in our online shop and if there have been no technical problems on our side, your license codes have been sent out to you immediately after your purchase. Sometimes, however, they get stuck in spam protection filters (either yours or your ISP's). Please, check your spam protection filter, and if you cannot find the license codes there, use *Help > Support Assistant* to get them resent to you. If this also doesn't work, please [contact us](#) and we'll try to get your license codes to you as quickly as possible.

Where can I buy a 1.x license code, e.g. for use on Mac OS X 10.4? License codes for legacy versions are no longer available in our shop but even the latest license codes are always backward-compatible: You can use a version 2.x license code also for version 1.x of the same product. To use a legacy product simply purchase a license for the most recent version of the product in our online shop and use it with your [legacy software](#).

MAC APP STORE

How can I upgrade apps purchased in the Mac App Store? By Apple's rigid rules you couldn't. Upgrades are simply not available on the Mac App Store and upgrade offers outside of the Mac App Store are not allowed. In some of our apps there may be an upgrade option still available, though. Check the [Read Me](#) to see if this is the case for you.

Can I get a refund? We freely refund licenses purchased in our own shop. For apps purchased in the Mac App Store this is not possible, though, as Apple does not provide a refund and license withdraw mechanism. Sorry.

YOUR SOFTWARE LICENSE

Why does DEVONthink Personal not accept my license code? When you enter your license code and the 'Register' button stays greyed out, try to enter ALL details, including your name and organisation, EXACTLY as they appear in our e-mail. Best practice is to copy-and-paste name, organisation (if entered) and license code from our email into the appropriate fields of the registration dialogue window. Also, please check if you have obtained the correct code for the correct edition of your software (e.g., a DEVONthink Pro license code will not work for DEVONthink Pro Office and vice versa) as well as version (DEVONthink 2.x will not accept a 1.x license code).

I have lost my license code. How can I retrieve it? Use *Help > Support Assistant* to open the Support Assistant which has an option to get your license code resent to you. Alternatively visit the [support area](#) on our web site.

Does my license code work also for an older version? Yes, it does. All our license codes are backward-compatible to legacy versions of the same product and edition.

Why do I have to enter my license code again? You only have to re-enter your license code after a complete reinstall of your system without a backup of your home folder or when the license code file has been deleted, e.g. by a preferences cleaner app. The license code is stored in a preference file in '~/Library/Preferences' (where ~ is your home folder). As long as this file is intact, you'll NEVER have to enter your license code again.

Why does my DEVONthink Personal 1.x license not work anymore? DEVONthink Personal with version numbers greater than 1.x are paid upgrades. To use them you may need a new license code. Please use [DEVONthink Personal > Check Upgrade Options](#) to find out what you need to upgrade and how much the upgrade is for you.

Why does your application say that it expired? When we release a public beta of one of our applications, we remove the usual trial restrictions but make it expire at the end of the beta period. A new public beta or the final release is, of course, available when this happens.

Please simply visit our [Download page](#), download a newer version than the one you have installed, and replace your copy with the newer one. Please first move the old application to the trash, then move the new one into its place.

| Note: Your license code will, of course, NEVER expire.

PRODUCT-RELATED QUESTIONS

[Click here](#) to read questions and answers specific to DEVONthink Personal.

If you have problems with DEVONthink Personal [click here](#) to read the troubleshooting instructions and tips.

TECHNOLOGY

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All commercial DEVONtechnologies applications are based on a proprietary AI technology, with rock-solid database foundation that allow them to manage large numbers of documents or knowledge bits while analyzing them almost instantly at the same time.

GENERAL CONCEPT

DEVONtechnology, on which all DEVONtechnologies' applications are built, is a new technology at the very beginning of its development. DEVONtechnologies constantly improves the technology and enhances it for more functionality, efficiency, robustness and flexibility.

Development of the DEVONtechnology is a battle on two main forefronts of information processing technology. DEVONtechnologies is working hard on unifying both the top-down and the bottom-up AI concepts by imitating high-level functions and simulating the basic functionality of natural systems. This leads to highly functional, fast and efficient AI systems that can be used in a great variety of information processing contexts, such as pattern recognition, signal processing and information storage and retrieval.

FEATURES

The DEVONtechnology is a rock-solid foundation suitable for a variety of completely independent applications. Therefore it is ideal for the rapid development of a huge range of new database-,

signal-processing- and language-analysis-driven applications. The ability to deal with any kind of digital data makes it extremely flexible.

The size of DEVONtechnology-based databases can, depending on the type of data stored, grow logarithmically and make indexing is completely unnecessary. Also, applications based on the DEVONtechnology improve themselves continuously (the more data they handle, the better the results), are language-independent and iron out any irregularities by applying fuzzy logic.

STRUCTURE

The DEVONtechnology consists of a kernel and several layers. Together they perform all the underlying computing, from 'simple' data handling to complex signal processing.

Kernel: The kernel is the foundation for all layers and applications and is responsible for data handling, semantic and associative data processing, signal processing, fast statistic analyses and all fuzzy algorithms. It has to be as fast, flexible, and extensible as possible; it is 64-bit aware and uses a generic, proprietary file format (see above) allowing it to verify and repair low level data consistency, featuring logarithmic growth of the database and logarithmic speed decrease with increasing database size. The DEVONtechnology kernel is Unicode-aware, completely language-independent and self-optimizing and self-organizing.

Layers: The layers form a shell around the kernel and provide high-level functions for the applications built on top of them. The database layer, for example, is used to store and organize data and supports all kinds of relations (1:n, n:1, n:n), hierarchies and freeform databases. No indexing or primary keys are required, strings can be unlimited in size and it's possible at any time to extend the range of pre-defined data types (Boolean, character, float, double, signed, unsigned, string, date, time,

blob, color, size, and point). Another layer, the XML layer, makes it easy to handle XML code within the DEVONtechnology; it has a very small overhead, compared to DOM parsers or available XML databases, requires no indexing and supports the tight integration of other databases (and vice versa).

APPLICATIONS

Some of the most likely applications for the DEVONtechnology are databases (knowledge bases, expert systems, search engines, table-of-content-generators, instant data-mining), intelligent agents, encryption, compression and archiving. Other uses for DEVONtechnology may be chat-bots, context-sensitive help, optical character

recognition (OCR), speech analysis, recognition and synthesis, statictics, thesauri and automatic translations.

In particular, applications dependant on processing human language, either written or spoken, benefit from the flexible technology foundation. So, DEVONtechnologies' main focus in the development of new applications is in these areas: databases, 'intelligent' agents, text and speech analysis, statistics.

Look forward to see a great range of different applications based on the DEVONtechnology. A few have already been announced on the DEVONtechnologies web site: www.devontechnologies.com.

OTHER PRODUCTS

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Besides DEVONthink Personal, DEVONtechnologies publishes a number of other commercial, shareware, and freeware applications, and services that you may be interested in.

AT A GLANCE

DEVONtechnologies is focused on developing innovative applications for finding, storing, and organizing information. Our main objective is to make complex yet flexible technology that is both easy to use and lightning fast.

- ▶ [DEVONthink](#)
- ▶ [DEVONagent](#)
- ▶ [DEVONnote](#)

All applications are based on the DEVONtechnology, a powerful and solid core unique to DEVONtechnologies. DEVONthink, DEVONnote, and DEVONagent are only the first of many more DEVONtechnology-applications yet to come.

Also, we publish and distribute useful shareware and freeware applications that help you in your everyday work with your Mac.

- ▶ [PhotoStickies](#)
- ▶ [Freeware applications and Services](#)

NEWSLETTER & FORUM

Would you like DEVONtechnologies to keep you informed about updates and new product releases? [Subscribe to the newsletter.](#)

And don't forget to have a look at our very lively [user forum](#), where users of all skill levels meet to discuss our applications, talk about our technology, and exchange tips and tricks for DEVONthink & Co.

DEVONTHINK

Make the dream of the paperless office come true with DEVONthink and keep all your text and RTF files, scanned documents, notes, emails, images, chat logs, bookmarks, and multimedia files together in one simple to use database. DEVONthink allows you to integrate both local documents and live content from the Internet, keeping all project- related information stored in one easy-to-access place.

WHY DEVONTHINK?

DEVONthink not only stores documents, it also facilitates editing, analyzing, organizing, finding, and archiving your documents with its flexible work environment, powerful organization tools, and built-in AI architecture.

INTEGRATED WORKSPACE

Unlike Mac OS X's Finder, DEVONthink provides an integrated work environment with all the tools you need for working with information of all kinds, from simple text to PDFs and multimedia files. DEVONthink can intelligently assist you with filing documents, finding similar files, or searching the database, saving you the trouble of having to manually manage thousands of files.

As a native Mac application, DEVONthink is also tightly integrated with the Mac OS X operating system and its frameworks. It provides a dock menu,

Services menu commands, and even makes heavy use of the Safari web browser engine and Mac OS X 10.4's advanced PDF library.

A PAPERLESS LIFE

DEVONthink Pro Office comes with a number of 'paperless office' functions not present in other editions of DEVONthink:

- ▶ Advanced email archiving
- ▶ Scanner support including optical character recognition and special support for the Fujitsu ScanSnap
- ▶ Integrated Web server for sharing information with other users

CHECKING YOUR UPGRADE OPTIONS

If you would like to buy an upgrade DEVONthink Personal to a higher edition, you have the following options:

- ▶ [Click here](#) to check your upgrade options.
- ▶ Choose [DEVONthink Personal > Check Upgrade Options](#).

Depending on whether you have purchased DEVONthink Personal in DEVONtechnologies' online shop or in the Mac App Store the second option may or may not be available.

[Click here to read more about DEVONthink.](#)

DEVONTHINK TO GO

Your document (literally) at your fingertips. DEVONthink on the Mac keeps your documents organized. But what about when you are away from your keyboard? Put your documents into your pocket with DEVONthink To Go, the DEVONthink and DEVONnote companion for the iPad, iPhone, and iPod touch.

POCKET YOUR DOCUMENTS

Browse, view, and search your documents with the touch of your finger. Create new notes or take a picture of important information and convert it to a searchable PDF (requires DEVONthink Pro Office on the Mac). Quickly label documents and flag them

for later review. Use the 'read' status to use it for reading the news feeds you archive in DEVONthink on the go.

You decide which databases and which groups and documents to synchronize with your device. DEVONthink To Go connects to its Mac counterpart via WiFi.

AT A GLANCE

- ▶ Take your DEVONthink or DEVONnote databases with you. Use the 'Sync' group to select only those groups and documents that are important for you.
- ▶ Use the global inbox to write down your notes without the need to immediately decide where to file them. If you use GTD you will know the idea.
- ▶ Quickly access all recently used items or view them as pins on a map. DEVONthink To Go stores your current location with every note you create on the go.
- ▶ Use the fast full text search to find the document you need with just a few taps. Use the power of SQLite on your mobile device.
- ▶ DEVONthink To Go honors the 'read' status of its Mac counterpart and can be used as a simple news feed reader.
- ▶ Set a password for your databases on your Mac and keep them from prying eyes on your iPad or iPhone.
- ▶ Capture data or open documents in third-party app like GoodReader. Add PDFs, images, or text documents from other apps to your DEVONthink Inbox.

[Read more](#) more about DEVONthink To Go or [visit the App Store](#).

DEVONAGENT PRO

DEVONagent Pro helps you search more efficiently on the web. It searches multiple sources, frees you from hunting for the really relevant results, and gives you power tools for your research.

- ▶ Filters bad results so you don't have to
- ▶ Shows results the way you want
- ▶ Creates reports in many formats
- ▶ Saves searches so you can continue later

YOUR PERSONAL META SEARCH ENGINE

DEVONagent Pro is not a simple Google interface. It knows how to talk to search engines — and how to squeeze the best out of them.

DEVONagent connects to as many search engines as you want, collects the data, and weeds out the junk that managed to slip through. It also scans your favorite websites and notifies you when it finds something that matches your query. It can even do all of this while you're sleeping; the results will be ready before you pour your first cup of coffee.

GET THE GOOD STUFF, SKIP THE JUNK

DEVONagent Pro is all about filtering what you don't want and giving you the best tools to find more of what you really want.

DEVONagent Pro doesn't simply trust the search engines. It filters all returned results again, allowing you to use advanced Boolean operators, proximity operators, and wildcards of unlimited complexity — something no single search engine allows you to do. DEVONagent's "scanners" can even find thumbnail galleries or linked PDF or Office documents for you. When you've found what you're looking but want a little more detail, the unique See Also list contains related pages from elsewhere in the search results, online and even from DEVONthink Pro.

THE INFORMATION YOU WANT, THE WAY YOU WANT

Every research task is different. DEVONagent Pro supports this with many ways to list, read, even explore your data.

View the results as a list or as a smart text summary, and explore them with the topics map. Unread results are marked with a blue dot, just like in Apple Mail, so that you don't miss the one important piece of information you're looking for. Finally, for viewing web pages there's DEVONagent Pro's specialized web browser. Extract images, RSS feeds, links, email addresses, even linked documents with a single click and save them for reference or reuse.

SAVE YOUR RESEARCH AND COME BACK LATER

Research is not only about finding, it's about collecting data, sharing it, and using it to create something meaningful.

DEVONagent Pro exports your filtered and trimmed-to-the-max research results in a variety of formats, from a simple list of bookmarks to comprehensive RTF digests and PDF reports. The built-in, searchable archive keeps them for later reference, or you can send your results to DEVONthink. Finally, you can save your search and continue later on, or even share it with others via email.

HOW DEVONAGENT PRO CAN HELP YOUR RESEARCH

- ▶ **Researchers:** Stay up-to-date on your subject with scheduled searches. Search through specialized online databases, scan important web sites, and get smart summaries. Extract the key facts using DEVONagent Pro's research-centric web browser.
- ▶ **Students & educators:** Find better course materials faster, with DEVONagent Pro weed out the chaff. Cite references for your papers and extract images and lists of links with a single click. Save interesting results in DEVONagent's archive or in DEVONthink.
- ▶ **Journalists:** Keep an eye on as many other information sources as you like and dig deeper into the subject you are writing about. Use the smart See Also function to learn more about the article you're reading. Save a search and return to it later if you get interrupted.
- ▶ **Lawyers:** Search LexisWeb and FindLaw efficiently with advanced Boolean operations, and use See Also to find related data with a single click. Export comprehensive reports, or save the results for future reference in DEVONagent's archive or in DEVONthink.
- ▶ **Power users:** Use DEVONagent Pro's specialized and easily automated browser to find and collect information and file it in DEVONthink. The object drawer and extensive AppleScript, JavaScript, and Automator support make it the #1 browser for DEVONthink users and enthusiasts.

[Click here to read more about DEVONagent.](#)

DEVONAGENT EXPRESS

You love Spotlight but it searches only your Mac? DEVONagent Express combines the ease-of-use and ubiquity of Spotlight with the powerful web search technology of DEVONagent. Just like Spotlight searches your computer DEVONagent Express searches the web and presents the results directly in its menu.

WHY DEVONAGENT EXPRESS

- ▶ Let's you search the web as easy as using Spotlight
- ▶ Shows convenient summaries and preview pictures
- ▶ Express mode gives you results quickly but unfiltered
- ▶ Agent mode does a thorough research, filters advertisements and error pages, and gives you only really relevant results back
- ▶ Talks to Google, Bing, Yahoo, YouTube, Facebook, Twitter, the App Store, and more than 80 other general-purpose and specialized search engines

PERFECT INTEGRATION

- ▶ Located directly in the menu bar, always there when you need it
- ▶ You already know how to use it
- ▶ Opens results in your web browser or DEVONagent (if available)
- ▶ Drag results to other apps, e.g. your favorite bookmark manager, into documents, or to the Finder
- ▶ Accessible by pressing a hotkey

DEVONAGENT LITE

DEVONagent Lite puts web search to where it belongs: next to Spotlight into your menu bar. Search all major and many specialized search engines and databases with a single click.

- ▶ Web search always at your fingertips
- ▶ All major search engines and many special ones
- ▶ Opens results directly in your web browser
- ▶ Use it free of cost!

SEARCH THE WEB LIKE WITH SPOTLIGHT

DEVONagent Lite adds a web search field to your menu bar. Google, Bing, and many more always at your service. Its global keyboard shortcut saves you even that click.

Just click DEVONagent Lite's menu bar icon, or press its keyboard shortcut, and start typing instead of switching to your browser, opening a new window, and clicking the search field first. Hit Return and DEVONagent Lite opens the search results in your default browser.

USE THE BEST ENGINE FOR THE JOB

Google & Co. are great for general questions but often it's better to ask the right people who really know.

Choose your search engine of choice from the magnifying glass pop-up menu to directly search in developer resources, blogs, dictionaries, directories, discussion lists, legal or medical databases, news, or reference sites such as Wikipedia. Find Facebook profiles, tweets, or images without deviation.

DEVONNOTE

DEVONnote helps you take notes and keep them organized. It keeps all your ideas, documents, important information, and even your web browser's bookmarks in one single, accessible place. DEVONnote supports you with professional, easy-to-use features, and helps create structure out of chaos with its unique AI functions.

DEVONnote is the most sophisticated notepad application for Mac OS X, and the only one that uses AI (artificial intelligence) instead of relying on you organizing your data completely manually.

WHY DEVONNOTE?

DEVONnote was designed with the typical Mac user in mind—a user who is:

- ▶ Creative
- ▶ Savvy (whether at work or at home)
- ▶ Desiring quality software

Consequently, DEVONnote comes with a clean, easy-to-use interface that gives you all the tools you need in a familiar Mac-like package. Even the most complex AI functions are just »buttons«, meaning one simple click can send DEVONnote into action, digging through all of your data to find a place for your latest note, or to show you all your ideas and concepts that are similar to the one you've just selected.

BRAIN FOOD INCLUDED

Of course, creative people don't just 'have thoughts', they often need new inspiration, too. We understand that, and that's the reason why DEVONnote comes with a complete Safari-based web browser and solid, but flexible, bookmark-managing capabilities. With DEVONnote, you can browse your favourite websites, then clip and save the most important information directly to your DEVONnote notebook.

But, of course, life is not just work! Use DEVONnote to watch and organize your favorite webcams, directly within your notepad.

[Click here to read more about DEVONnote.](#)

NEEDFUL THINGS

EASYFIND

As an alternative to the Finder's find function, EasyFind finds files, folders, or contents in any file without the need for indexing. This is especially useful if you are tired of slow or impossible indexing, outdated or corrupted indices, or if you are just looking for missing features like case sensitive or insensitive search, Boolean operators, wildcards, or searching for phrases. In addition, EasyFind uses multi-threading and is therefore very responsive, even with multiple search processes running. The application provides contextual menus and Mac OS X Services, and displays the location of each item in a separate column for a better overview. EasyFind uses little memory, supports drag-and-drop and the clipboard, and optionally finds invisible items or items within packages.

PHOTOSTICKIES

PhotoStickies puts all your favorite pictures on your desktop, as stickies, floating or even borderless. Sticky pictures may reside on your computer, or on the Internet. PhotoStickies also displays live webcams on your desktop, updates them automatically, and even records them like a VCR.

Key features:

- ▶ Displays all image formats supported by Mac OS X
- ▶ Displays local images, pictures located on the Web or webcams
- ▶ Shows images as stickies or as desktop wallpaper
- ▶ Many live effects, e.g. alpha channels, transparency, color corrections
- ▶ Savable states
- ▶ Internet-based list of new webcams
- ▶ Can run as a menu extra

THUMBSUP

ThumbsUp is a simple, drag-and-drop based utility designed to create thumbnail images from batches of pictures. (The application supports all Mac OS X and QuickTime image formats, including PDF documents.) Image size, quality, sharpening, and antialiasing are configurable, and images can be scaled by percentage or limited to a maximum size. With a scaling of 100 percent, ThumbsUp may be used as an ultra-fast, comfortable image converter.

Use ThumbsUp to quickly create thumbnails, e.g., for using on your Web site or for sending by email.

XMENU

XMenu brings back Mac OS 9's Apple menu back from the dead, adding its functionality to Mac OS X. One or more global menus to the right side of the menu bar let you easily access your preferred applications, folders (and subfolders), documents and files. Furthermore, there's no explicit need for a configuration (like creating lots of folders and aliases or adding items to user-defined setups)-just activate the menus you like: Applications, Developer Applications, Home, Documents, or User-Defined (like the old Apple menu found in Mac OS 9).

FREWARE SERVICES

Besides the full-blown freeware applications, DEVONtechnologies also offers a variety of useful services that extend the functionality of Mac OS X's Services menu and that allow Cocoa applications like TextEdit or DEVONthink to open PDFs like simple RTF files. These services include:

- ▶ BlueService

- ▶ CalcService
- ▶ PDF2RTFService
- ▶ WordService

[Click here to read more about DEVONtechnologies' freeware applications and services.](#)

APPENDIX

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In the appendices you will find additional information that helps you getting familiar with DEVONthink Personal such as a glossary of commonly used terms, a listing of the Boolean operators that you can use in searches, and placeholders that you can use in templates for yet "targetless" WikiLinks.

GLOSSARY

Become familiar with these terms to get the most out of working with DEVONthink Personal.

KEYBOARD SYMBOLS

- ▶ ⌘ The *Command* key, usually next to the *Space* bar.
- ▶ ⌥ The *Option* key.
- ▶ ⌘ The *Control* key (usually labeled with "ctrl").
- ▶ ⇧ The *Shift* key.
- ▶ → The *Tab* key.
- ▶ ↵ The *Return* key.

INTERFACE ELEMENTS

- ▶ **Contextual Menu:** The menu that appears when you right-click (or ⌘-click) something; the contextual menu gives you access to frequently used commands that deal directly with the

clicked object. Read more about the available contextual menus in the [Documents](#) and [Windows](#) chapters.

- ▶ **Item list:** A list of items stored in the database. Items can be [documents, groups, or smart groups](#).
- ▶ **View/Edit Pane:** A part of the DEVONthink Personal [main](#) and [document](#) windows that lets you view a document or, if possible, edit it. The view/edit pane displays the [content of your documents](#) depending on their type. [See also p. 27ff](#)
- ▶ **View (1):** The layout for a DEVONthink Personal [main window](#). You can change the layout using the commands found in the [View menu](#).
- ▶ **View (2):** The display for the various document types inside the the view/edit pane or a [document window](#). [See also p. 39ff](#)
- ▶ **Window:** DEVONthink Personal uses three different types of windows: main, document, and other windows. [Main windows](#) show lists of items and, in some views, also the contents of the selected document, whereas [document windows](#) show documents separately.

DOCUMENTS & GROUPS

- ▶ **Database:** A collection of all documents stored in DEVONthink Personal. DEVONthink Personal only manages one central database.
- ▶ **Document:** A file in the database; for example, a plain or RTF text, a PDF, or an image. Technically a document is an entry in a database with text, RTF, or image content. Sometimes referred to as 'content'.
- ▶ **Default Destination:** The default destination group for incoming data. In DEVONthink Personal this is the special Inbox group.
- ▶ **Group:** A collection of documents or other groups inside the database. Similar to a folder in the file system. [See also p. 15ff](#)
- ▶ **Inbox:** A special group for data coming in to a database.

- ▶ **News Feed:** A news feed is like a web page but splitted into multiple newsbits. A feed reader or web browser can split the feed 'page' into its parts and show each of them as a separate news and/or store it in a local database. DEVONthink Personal can store feeds in a database and displays them like a group which contents are updated live from the Internet as the connected feed changes. Older news bits are kept, new bits are added and marked as unread. When you add a bookmark that points to a feed to a database, DEVONthink Personal tries to add it as a proper feed document if possible. DEVONthink Personal can also be defined as the system's RSS reader in Safari's Preferences.
- ▶ **Replicant:** A document or a group that appears in more than one place in the database. Unlike an alias in the file system, a replicant is not a real document pointing to another file (usually the original), but only a second entry in the table of contents for the very same document. Consequently, there is no original; when you replicate a document you'll end up with two replicants. [See also p. 16ff](#)
- ▶ **Smart group:** Not a real group but a 'saved search' that appears like a group. Every time you visit this smart group, DEVONthink Personal runs the attached search and displays it as the content of the group. Create smart groups using the [search window](#) or the [smart group editor](#). DEVONthink Personal creates a number of pre-defined smart groups when you create a new database.

- ▶ **Trash:** Stores all trashed items until you finally physically delete them using [DEVONthink Personal > Empty Trash](#).

TAGS

- ▶ **Tag:** A tag is a different visual representation of a group. All documents contained in a group which has not been excluded from tagging, have the group's name 'attached' as a tag. Tags represented by a regular group appear grey in all list of tags.
- ▶ **Group tag:** Tags represented by a regular group.
- ▶ **Ordinary tag:** Tags created e.g. through the Tag bar or other means are created in a special top-level group named 'Tags'. They are called 'ordinary tags' and in all list of tags they appear blue.

ITEM PROPERTIES

- ▶ **Flagged/Unflagged:** Items can be checked or unchecked for your personal use, e.g. for creating a to-do list, for maintaining a shopping list, or for writing a list of project tasks.
- ▶ **Locked/Unlocked:** Items can be locked to keep them from being unintentionally modified.
- ▶ **Read/Unread:** Items can be marked read or unread which is useful for captured or [automatically downloaded news items](#) or documents that you want to read later. Unread items and groups containing unread items are shown in bold.

The 'flagged' and 'locked' properties are indicated by icons. [See also p. 78ff](#)

FAQ (PRODUCT-SPECIFIC)

GENERAL

What is the difference between the various editions? While all three editions of DEVONthink as well as DEVONnote share many features, there are some noticeable differences. For instance, DEVONthink Pro is able to deal with more than one database, features tables, forms, and categories, and comes with full AppleScript support; and DEVONthink Pro Office comes with plugins for pro-grade email archiving, paper capture, and Web sharing. You can find a complete listing of all differences on the [feature comparison page](#).

Which languages does DEVONthink Personal support? DEVONthink Personal supports multilingual documents and Unicode and so supports all Asian languages including Chinese, Japanese, and Korean, as well as non-Latin scripts such as Cyrillic, Hebrew, and Arabic (including writing from right to left; use [Format > Alignment > Writing Direction](#) to adjust the writing direction).

Note: Asian languages, however, do not use word separators such as white space or punctuation. When searching you need to use wildcards. Use ~word or *word* in the search field or search window.

How do I completely uninstall DEVONthink Personal? To completely remove DEVONthink Personal from your Mac, see the instructions in the [Read Me](#).

DATABASES

Can I use more than one database? DEVONthink Personal stores all data in a central folder in '~/Library/Application Support/'. To use multiple databases consider upgrading to DEVONthink Pro or higher.

How are my documents stored? DEVONthink Personal stores all documents in sub-folders of '~/Library/Application Support/DEVONthink 2' where ~ stands for your home folder.

Inside the 'Files.noindex' folder the actual documents are stored in sub-folders for their respective type and further sub-folders that help DEVONthink Personal to quickly locate them. Documents are never altered when you copied them into the database. The file name of each documents is exactly the same as the corresponding document name that you see in DEVONthink Personal.

In addition, the database folder contains a set of ten index files named with the suffix '.dtMeta' as well as a 'Settings.plist' file containing database-specific preferences. Finally, the database folder can contain one or multiple folders named 'Backup.x'. They contain backups of the index files and are created automatically by DEVONthink Personal's backup function. They do not contain copies of all actual documents.

How can I move my database to another computer? Your database is the folder '~/Library/Application Support/DEVONthink 2'. To move it to another computer copy it to the same location on the other computer.

Note: In general, databases are self-contained, so all one has to do is move it to another computer, open it and start using it. But if some of the content has been indexed instead of imported, it will be necessary to also move the externally linked files to the other computer in such a way that the Paths to the external files remain valid. If everything is in your Documents folder on the first computer, copying the externally linked folders and files to the Documents folder of the second computer will probably work. Always quit the DEVONthink Personal application before copying or moving a database, as copying an open database may result in an incomplete or damaged copy.

Can I share my DEVONthink database using WebDAV or DropBox? You can, but it is definitely not recommended as WebDAV servers do not fully support all properties of real hard disks. See below.

Can I synchronize databases between multiple computers? We are currently working on a synchronization module that will allow you to sync databases between multiple computers either directly or via file servers or Dropbox. Please check [our President's blog](#) for up-to-date information.

In the meantime you can try to use a third-party product called 'DevonSync' made by [Wooden Brain](#) that synchronizes DEVONthink databases bi-directionally. DevonSync is not officially supported by us and we do not give any guarantee for your data's safety.

ICONOLOGY

Additional icons behind item names, e.g. in [main windows](#), indicate that the item has been indexed instead of imported, is locked, has a comment attached, or is scripted. Groups also serving as tags show, if necessary, a tag icon. Depending in your [preferences](#) replicants, duplicates, or replicated duplicates are also indicated with a little grey icon instead of appearing in color.

- ▶  Item has been flagged [See also p. 16ff](#)
- ▶  Item is indexed, not imported
- ▶  Item is locked [See also p. 16ff](#)
- ▶  Item has a comment [See also p. 35ff](#)
- ▶  Group is a tag, too [See also p. 78ff](#)
- ▶  Item is a duplicate
- ▶  Item has one or more replicant(s)
- ▶  Item is a duplicate but also has one or more replicant(s)

TAGGING

DEVONthink Personal supports tagging in a way that makes groups and tags interchangeable. While this concept may sound a bit strange at first you will soon discover why it is a smart way to approach tags and group and to bring both together.

INTRODUCTION

Technically, tags and groups are identical: both are simply entries in a table that are somehow 'attached' to an item, usually a group or document. The difference is that tags are visualized as 'labels' attached TO the item while groups are visualized as groups CONTAINING the item. They are presented differently but internally they are the same.

DEVONthink Personal treats groups as tags and tags as groups. When it shows you the tags associated with an item it presents you with a list of all groups that the item is part of and that have not been excluded from tagging.

Example: A document is located in the group 'Science > Paleontology > Dinosaurs'. Consequently its tags are 'Science', 'Paleontology', and 'Dinosaurs'. Now you create a sub-group of 'Dinosaurs' named 'Land-living' and move the

document into the new folder. Automatically it is now tagged with 'Science', 'Paleontology', 'Dinosaurs', and 'Land-living'.

The same happens when you replicate the document into multiple groups: It is tagged with the names of all enclosing groups (that are not excluded from tagging) of all its replicants.

When you assign a tag using DEVONthink Personal's user interface, move a document, or replicate it to another group, this is what happens:

- ▶ **Assign a tag:** The item is replicated to the [Tags group](#).
- ▶ **Removing a tag:** The item's replicate in the Tags group is deleted.
- ▶ **Adding an item to a group:** The group's name and the names of all groups containing the group appear as tags attached to the item.
- ▶ **Moving an item:** The new group's name and the names of all groups containing it appear as tags attached to the item.
- ▶ **Replicating an item:** The new group's name and the names of all groups containing it appear as tags attached to the item, too.
- ▶ **(Auto-) Classifying an item:** This places the item into a new group and replaces all assigned tags.

Tags represented by a regular group are called "group tags", tags created without an existing group are called "ordinary tags". [See also p. 76ff](#)

THE TAGS GROUP

Every DEVONthink Personal database contains a top-level group named 'Tags'. It is used whenever you add a tag to an item e.g. through the tag bar, for which not yet a group exists. In this case DEVONthink Personal creates a group for the tag in the Tags group and places a replicant into it.

When you rename a group here all items associated with it (means: that have a replicant here) will show this change.

USING TAGS

To use tags for selecting documents, finding them, or browsing tags DEVONthink Personal offers the following options:

- **Tags view:** The tags view allows you to browse your documents by tags. In the tags view select a tag to display all items which have this tag assigned. Choose multiple tags, e.g. by clicking another one with ⌘ held, shows all items carrying all selected tags.
- **Smart groups:** Use smart groups to search for items with given tags.

Wherever tags are shown, ordinary tags (tags created in the special Tag group) appear blue, tags that are also regular groups appear grey. Tags, e.g. in the Tag bar, also show a pop-up menu when you click their downward triangle. It shows related tags which can be added to the item, and tags represented by a group can be revealed.

ALIASES AND EXCLUDING FROM TAGGING

DEVONthink Personal also honors aliases added to groups. You can add 'alternative names' to a group in its [Info panel](#) and later use these alternative names as a tag.

Example: In the Info panel of the group 'Dinosaurs' you have added 'Dinos' as an alias. You can now tag items with 'Dinos' and they will automatically moved or replicated to the 'Dinosaurs' group.

Groups that you don't want to use as tags can be excluded from tagging. Select it and open the [Info panel](#). Check *Exclude from ... Tagging* and the group will no longer be shown as a tag for items contained in it.

OPENMETA

[OpenMeta](#) is an open standard for storing tags with files in the file system. Using OpenMeta applications can add tags to files and let other [compliant applications](#) read them.

DEVONthink Personal supports OpenMeta when importing and exporting files. Files stored in the database are not tagged in OpenMeta-style but assigned tags will be added to the files as soon as you export them.

FILE FORMATS

DEVONthink Personal supports a variety of text and image formats, including plain text, Rich Text Format (RTF), PDFs, all image formats supported by Mac OS X and QuickTime as well as all file formats for which a Quick Look preview is available.

TEXT FILES

DEVONthink Personal supports plain text files (as well as Mac OS 9 SimpleText and Tex-Edit Plus files) in all encodings supported by Mac OS X, including Unicode and UTF-8. By default, DEVONthink Personal automatically recognizes the encoding and the line endings used by Mac, Windows, or Unix operating systems.

- **Extensions:** adb, ads, aln, ans, applescript, bat, bib, bibtex, c, cls, cmd, command, con, cp, cpp, crash, css, csv, dot, em, embl, erl, err, f, f70, f90, fasta, for, fpp, gb, genbank, gff, h, haml, hlp, hpp, hs, hrl, id2xf, inc, js, lhs, lisp, log, lst, m, markdown, md, mdwn, mi, mis, ml, mly, mm, mmi, mml, msf, org, p, pas, pir, pl, pp, py, rb, rc, sass, scm, scpt, scptd, scriptSuite, scriptTerminology, sdef, seq, sh, sqc, sql, ss, strings, sty, sw, swiss, tab, tcl, tex, text, textile, txt, v, vcf, wrl, x, xchatlog, xd, ychat
- **HFS type codes:** TEXT, ttro, TERO, sEXT, SimpleText, scpt, osas, APPL (AppleScripts wrapped in an executable application)
- **Automatic recognition:** DEVONthink Personal also recognizes plain text file formats defined by third-party applications.

Rich Text Format: For Rich Text Format (RTF) files, DEVONthink Personal recognizes Mac, Windows, and ANSI encodings as well as Mac OS X RTF documents with attachments (RTFD).

- **Extensions:** rtf, rtfid
- **HFS type codes:** RTF

OFFICE AND OTHER DOCUMENTS

DEVONthink Personal imports many Office file formats such as [Microsoft Office](#) and [OpenDocument](#) documents as well as all other file formats for which Quick Look support is available, e.g. [Mellel \(version 2.6 and higher\)](#) files, AppleScript scripts or text clippings.

Note: Quick Look is Mac OS X 10.5's mechanism for displaying a preview of almost any file type. In the Finder this function is invoked by pressing the *Space* bar. Quick Look requires the maker of the software that writes the document to add additional preview information inside the file (package) or to provide a Quick Look plugin embedded into the application itself or installed in a Library folder. If neither DEVONthink Personal nor the Finder can preview a document format that you want to use, please contact the maker of the software and ask it to provide Quick Look support for its file format.

Due to the nature of Quick Look, the contents of a document that is displayed using this technology, e.g., an Apple Pages file, is sometimes not selectable. Depending on the file format, for some files a plain or rich text alternative is available, e.g., for email messages. Where available use the Text View/Preview toggle button in the document's [navigation bar](#) to switch back and forth between plain text and preview modes.

Additional Quick Look plugins can be found e.g. on [QLPlugins.com](#).

CHAT LOGS

DEVONthink Personal understands the text format of logs generated by [Adium](#), iChat or [Yahoo Messenger](#). You can import them like rich text files.

- **Extensions:** chat, chatlog, ichat
- **HFS type codes:** YMSG

PDF, POSTSCRIPT, SKIM

DEVONthink Personal imports and displays Portable Document Format (PDF) files, Skim PDF packages, and PostScript files. DEVONthink Personal extracts the readable text portions of the

PDF making it possible to search the text of the PDF and to use [See Also & Classify](#). PostScript files are converted to PDF on-the-fly.

It is possible to manually convert imported PDFs to plain text or RTF by using [Data > Convert](#).

Note: It's not yet possible to extract text from protected PDF files. Protected PDFs are imported as simple images. You can correctly view the PDF in DEVONthink Personal, though, after entering the correct password.

BOOKMARKS

Drag or paste Internet addresses from any Internet application, or Internet location files from the Finder, to DEVONthink Personal to create a bookmark documents. DEVONthink Personal is especially optimized to accept Safari Bookmarks. Use bookmarks in DEVONthink Personal to integrate 'live' content from the Internet seamlessly with local documents.

- **Extensions:** dtLink, ftploc, fileloc, inetloc, mailloc, newsloc, url, vncloc, webloc
- **HFS type codes:** ilht, ilft, ilfi, ilma, ilnw, ilaf, ilat, ilns, ilge, ilvn, LINK

HTML AND XML

In addition to the text encodings already listed, DEVONthink Personal supports the standard HTML transcriptions for special characters (for example German umlauts and French accents). HTML can also be converted to plain text using [Data > Convert](#). XML files of any kind can also be imported and are displayed with syntax coloring. Preference property lists of Mac OS X 10.4 and higher are stored in a binary format and are converted on-the-fly to readable XML.

Also, DEVONthink Personal supports Web archives containing HTML pages including all necessary images for displaying them offline.

- **Extensions:** asp, aspx, cgi, cfm, dtd, ent, htm, html, idata, jhtml, jsp, mhtml, oimpl, ooutline, php, php3, php4, phtml, plist, rdf, rsd, rss, sdef, sgm, sgml, shtm, shtml, tbx, wml, xbl, xhtm, xhtml, xml, xmloutline, xsl, xslt, webarchive

- **Automatic recognition:** DEVONthink Personal also recognizes HTML and XML file formats defined by third-party applications.

IMAGE FILES

DEVONthink Personal imports all image formats supported by Mac OS X and [QuickTime](#).

- **Extensions:** bmp, cur, eps, fax, fpix, fpx, gif, icns, ico, jpeg, jpg, mac, pct, pdf, pict, png, pnt, pntg, psd, qti, qtif, rgb, sgi, targa, tga, tif, tiff; Mac OS X 10.4 or QuickTime 7 only: jp2, dng, exr, raw
- **HFS type codes:** 8BPS, BMPf, EPSF, FPix, GIFf, 'ICO', JPEG, 'PDF', PICT, PNGf, PNTG, 'SGI', TIFF, TPIC, qtif

Installed applications or services can add support for other file formats to Mac OS X and therefore to DEVONthink Personal as well.

Note: PICT files can still be imported but Mac OS X 10.5 does no longer display them.

MULTIMEDIA FILES

DEVONthink Personal displays or plays [QuickTime](#) movies, sounds, [Flash](#) movies and [Shockwave](#) animations. To add movies, sounds, or MP3s to

DEVONthink Personal, import them like any other file to your database. Multimedia files can also be dragged into a rich text document to integrate them with text and images.

- **Extensions:** 3g2, 3gp, 3gp2, 3gpp, aac, adts, aif, AIF, aifc, AIFC, AIFF, aiff, amc, amr, atr, AU, au, avi, bwf, caf, cdda, cel, dif, dv, dvd, flc, f4v, fli, gsm, kar, m15, m1a, m1s, m1v, m2a, m2v, m3u, m4a, m4b, m4p, m4v, m75, mid, midi, mov, MOV, mp2, mp3, MP3, mp4, mpa, mpeg, mpg, mpm, mpv, mqv, MQV, pls, qht, qhtm, qt, qtpf, qtz, rtsp, sd2, sdp, sdv, skin, smf, smi, smil, sml, SND, snd, swa, swf, ulw, ULW, vfw, wav, WAV
- **HFS type codes:** .SMI, .WAV, 3gp2, 3gpp, adts, AIFC, AIFF, ALAW, 'amc', 'amr', attr, caff, cdda, DAVI, DIVX, dvc!, embd, 'FLI', grip, 'GSM', hmov, 'M1A', 'M1V', Midi, MooV, 'Mp3', 'MP3', MPEG, 'MPG', MPG2, MPG3, mpg4, MPGa, MPGA, MPGv, MPGV, MPGx, mxf, PLAY, qhtm, rtsp, Sd2f, 'sdp', 'sdv', SMIL, SwaT, SWFL, ULAW, 'VfW', WAVE

DEVONthink Personal also supports QuickTime file types provided by third-party components.

TEMPLATES

DEVONthink Personal comes with a number of pre-fabricated templates for general use. Use them to add e.g. a task list, a quote, or whole group structured, e.g. for project management, to your database.

MANAGING TEMPLATES

Templates are regular files stored in the Finder in the folder '~/Library/Application Support/DEVONthink 2/Templates.noindex'. Navigate to this folder in the Finder to manage your templates, rename them, organize them in sub-folders, or delete them.

More templates are available as extras. [See also p. 38ff](#)

PRE-FABRICATED TEMPLATES

DEVONthink Personal comes with the following pre-fabricated templates which can serve as examples of what you can do with the template feature.

Note: Not all of the listed templates are available in DEVONthink Personal as DEVONthink Personal does not support AppleScript. Templates based on simple files or on template packages are available, though.

General use:

- ▶ **Annotation:** Adds an annotation for a selected document. The annotation is put next to the selected document (and is replicated to all other instances of the document if necessary) and contains a link to the annotated item. This template links to the current page of a PDF document if possible. If there is already an annotation for the selected document, no second one is created but the existing annotation is opened.
- ▶ **Note:** Adds a new note. If the clipboard contains text it is automatically inserted for you; if it contains an Internet address (URL) it is added to the note's link list.
- ▶ **Phone Note:** Adds a new phone note. The current date and time is automatically inserted.
- ▶ **Project:** Adds a simple project group structure including an 'About this project' document. The smart template ask for a project name, retrieves your name, department, email address, and phone number from your address book card and adds all this information to the 'About this project' document.
- ▶ **Task List:** Adds a simple task list.
- ▶ **Web Browser:** Adds an HTML document that allows you to use DEVONthink Personal like a regular web browser. Open this document, enter an Internet address into the address field and click the Go button to visit the web site.

Accounts & Passwords:

- ▶ **Online Account:** Adds a document for storing online account details.
- ▶ **Serial Number:** Adds a document for storing serial numbers.

Addresses & Dates:

- ▶ **Address Book Card:** Adds the card selected in Address Book as a rich text document to your database.
- ▶ **iCal Event:** Adds an iCal event you have copied to the clipboard (!) as a rich text document to your database. You need to copy the event to the clipboard because iCal does not provide a mechanism to retrieve the selected event.

Classifications:

- ▶ **Decimal Filing System:** Adds ten groups for the decimal filing system using in many companies in Germany, Europe, for filing (scanned) paper documents.
- ▶ **Dewey Decimal Classification:** Inserts a group with sub-groups that builds the first levels of the Dewey Decimal Classification. Use it for databases that contain knowledge spanning many subjects.
- ▶ **Library of Congress Classification:** Inserts a group with sub-groups that builds the first levels of the Library of Congress Classification. Use it for databases that contain knowledge spanning many subjects.

Education:

- ▶ **Cornell Notes (Pages):** Adds an Apple Pages document that allows you to write down notes in Cornell style.
- ▶ **Cornell Notes (rich text):** Adds a rich text document that allows you to write down notes in Cornell style.
- ▶ **Quote (from clipboard):** Adds a rich text document for a quote or citation. The clipboard content is automatically inserted and if it's an Internet address (URL) it is automatically made clickable.
- ▶ **Reference (from Bookends):** Adds the reference selected in Bookends to your database.
- ▶ **Reference (from Endnote):** Adds the reference selected in Endnote to your database.
- ▶ **Reference (from Sente 6):** Adds the reference selected in Sente 6 to your database.

Office:

- ▶ **Apple Numbers/Pages document:** Adds empty Numbers or Pages.
- ▶ **Microsoft Excel/Word document:** Adds empty Excel or Word documents.
- ▶ **OpenOffice Calc/Writer document:** Adds empty OpenOffice documents. This smart template checks whether OpenOffice is installed or not before adding the document.

Registers:

- ▶ **1–31:** Adds 31 groups, numbered 1 through 31.
- ▶ **A–Z:** Adds 26 groups, named A through Z.
- ▶ **Days of the Week:** Adds groups for the days of the week.
- ▶ **Months:** Adds groups for the twelve Christian months.

Search:

- ▶ **PubMed:** Runs a query in PubMed and adds the resulting documents formatted as rich text documents to your database.

Smart Groups:

- ▶ **Email ... Videos:** Adds smart groups selecting documents of a given kind.
- ▶ **Last ...:** Adds smart groups selecting documents modified within a given period.
- ▶ **Large Documents:** Adds a smart group selecting documents larger than 5 MB.
- ▶ **PDF (not searchable):** Adds a smart group selecting all PDF documents that don't contain machine-readable text.

TEMPLATE PACKAGES

Besides the more complex smart templates DEVONthink Personal supports template packages. They are folders with the file name extension '.dtTemplate' and contain one or multiple folders, one for each supported language. This way you can let DEVONthink Personal import the files in the right language depending on the system language.

In addition you can use the following placeholders in your file or folder names of your templates packages as well as in contained rich text, plain text, HTML, or XML files. During import they are replaced with actual data.

- ▶ **%time%:** The current time
- ▶ **%date%:** The current date
- ▶ **%shortDate%:** The current date in short format
- ▶ **%longDate%:** The current date in long format
- ▶ **%monthname%:** The month name of the current date
- ▶ **%weekday%:** The week day name of the current date
- ▶ **%day%:** The day number of the current date
- ▶ **%month%:** The month number of the current date
- ▶ **%year%:** The year number of the current date
- ▶ **%username%:** The user name
- ▶ **%fullUsername%:** The user's full name
- ▶ **%organization%:** The user's organization from Address Book
- ▶ **%emailAddress%:** The user's email addresses from Address Book
- ▶ **%host%:** The host name
- ▶ **%databaseName%:** The database name
- ▶ **%databasePath%:** The database's path
- ▶ **%groupName%:** The name of the parent group
- ▶ **%clipboard%:** The clipboard contents as plain text
- ▶ **%styledClipboard%:** The clipboard contents as rich text
- ▶ **%clipboardLink%:** The clipboard contents as clickable rich text link if the clipboard contains a valid URL

SMART TEMPLATES

Most of the pre-fabricated templates are 'smart templates': They are not simple files but actually AppleScript packages that are executed when you select it in the [Data menu](#). These packages contain both script code as well as the actual templates that they insert into your database. This has a number of advantages:

- ▶ The script can choose a localized template for your language; also possible using a [template package](#).
- ▶ The script can add information to the pre-fabricated template, for example the current date and time or data from the Web.
- ▶ The script can act intelligently on data on the clipboard: If it's a simple text it adds the text, if it's a URL it adds it to a different area of the document and makes it clickable.
- ▶ The script can check if a certain application is installed, e.g. OpenOffice, before adding a document for it.

WEB SITE EXPORT TEMPLATES

For the export as web site, DEVONthink Personal uses templates available in ~/Library/Application Support/DEVONthink 2/Websites/ to create HTML files from documents. You can choose the template in the save dialog that appears when you use [File > Export > as Website](#)

In the HTML templates, the following placeholders can be used:

- ▶ %databasePlusLocation%

- ▶ '%comment%'
- ▶ %url%
- ▶ %tags%

These placeholders will be replaced with actual information during the export. The placeholders will only be replaced in documents that are converted to HTML during export, namely plain text, rich text, Microsoft Office/OpenOffice documents, scripts, chat logs, and sheets.

SEARCH OPERATORS

In the [toolbar search field](#) you can use standard and extended Boolean operators, parenthesis, and more to fine-tune your search.

The syntax of the operators is compatible to [DEVONagent](#) and [EasyFind](#), the Finder, Spotlight, common search engines as well as common programming languages such as C, C++, Objective-C, Java, and JavaScript. The complexity of the query is unlimited.

CASE

All terms are case-insensitive. You may, if you wish, use capitalization for proper names in a query, but DEVONthink Personal will ignore case in interpreting the query.

PRECEDENCE OF TERMS

Search terms and associated operators will be interpreted from left to right, except as modified by including portions of the query within parentheses.

WILDCARDS

You can replace parts of words with wildcards matching one, multiple, or a range of characters:

- ▶ ?: Matches exactly one character.
- ▶ *: Matches none, one, or multiple characters.

- ▶ **[a-b]**: Matches one character of the range 'a' through 'b'.
- ▶ **[abc...]** or **[a|b|c|...]**: Matches one character out of the given list of characters.
- ▶ **[^...]**: Matches one character that is not contained in the given list or range.

BOOLEAN OPERATORS

The operators (often called Boolean operators) are words or symbols that establish logical rules for the terms in the search query. If no operator is given, DEVONthink Personal implies AND. The available Boolean operators are:

- ▶ **term1 AND term2**: Contains term1 AND term2
- ▶ **term1 BUT term2**: Contains term1 AND term2
- ▶ **term1 OR term2**: Contains term1 OR term2
- ▶ **term1 XOR term2**: Contains term1 or term2, but not both
- ▶ **term1 EOR term2**: Contains term1 or term2, but not both
- ▶ **NOT term**: Does not contain term
- ▶ **"term1"**: Contains the string term1, in exactly this form

Beside the classic Boolean operators, DEVONthink Personal uses a number of operators that can usually only be found on high-end databases. Use them as a replacement for AND and "quotes" to fine-tune your query.

- ▶ **term1 OPT term2**: term1 needs to occur, term2 can. If term2 does, the found document ranks higher in the search results.
- ▶ **term1 NEAR term2**: term1 occurs 10 words or less before or after term2
- ▶ **term1 NEAR/n term2**: term1 occurs n or less words before or after term2
- ▶ **term1 BEFORE term2**: term1 occurs before term2
- ▶ **term1 BEFORE/n term2**: term1 occurs n or less words before term2
- ▶ **term1 NEXT term2**: term1 occurs right before term2 (shortcut for BEFORE/1)
- ▶ **term1 NEXT/n term2**: term 1 occurs n or less words before term2 (synonym for BEFORE/n)
- ▶ **term1 AFTER term2**: term1 occurs after term2
- ▶ **term1 AFTER/n term2**: term1 occurs n or less words after term2
- ▶ **~term1**: Contains all words that begin or end with term1 (words containing term1 as a part of the word; depends on the queried search engine)

For convenience, some of these operators can also be abbreviated using commonly used symbols:

- ▶ **AND**: &, &&, +
- ▶ **OR**: |, ||
- ▶ **XOR**: ^, ^^
- ▶ **NOT**: !, -

Note: The symbols above are also used by the Finder and Mac OS X's Spotlight for searches. Enter the vertical ruler character for the OR operator by pressing $\rceil$ 7 (e.g. on European keyboards).

Operators are evaluated in the following priority: parenthesis > phrase/hyphens > (NOT) BEFORE/AFTER/NEAR/NEXT > NOT > AND/OR/XOR/EOR. Terms with same priority but without parenthesis are evaluated from left to right.

DATE COMPARISON OPERATORS

For comparing dates in smart groups the following operators are available:

- ▶ **< date**: Matches items that were created/edited/viewed before date.
- ▶ **<= date**: Matches items that were created/edited/viewed before or on date.

- ▶ **>= date:** Matches items that were created/edited/viewed after or on date.
- ▶ **> date:** Matches items that were created/edited/viewed after date.

WHITE SPACE HANDLING

Words concatenated by non-white separators (e.g. `www.devon-technologies.com` or `page_id`) are treated like phrases put into "quotes". Words separated by hyphens are handled like `word1word2` OR `"word1 word2"`. Characters separated by dots are considered to be abbreviations and therefore handled like words separated by hyphens, e.g. the term `t.a.t.u` is equal to `"t a t u"` OR `tatu`

EXAMPLES

Using any or all of the operators and rules layed out above you can create complex queries that find exactly what you are looking for. Here are some example queries that show how the operators are used.

Example: Devonian Dinosaurs

This query looks for all documents that contain the words 'devonian' and 'dinosaurs'.

Example: (Steve NEAR Jobs) AND iMac BUT NOT MacBook OPT Pro

This query looks for documents that contain the words 'Steve' and 'Jobs' not farther away from each other than ten words as well as the word 'iMac' (no specific position relative to Steve and Jobs) but not the word 'MacBook'. The word 'Pro' does not need to occur but if it does, the document is ranked higher in the list of search results.

Example: Paracetamol NEAR (~effect OR impact) AND ((side OR second*) NEAR/2 ~effect)

This query looks for documents containing the word 'Paracetamol' near (within ten words) to words either starting with 'effect' (and so also 'effects') or being 'impact'. In addition, the document needs to contain the word 'side' or any word starting with 'second' within two words range from any word starting with 'effect'.

TEMPLATE TAGS FOR WIKI-STYLE LINKS

In DEVONthink Personal you can create new documents by first selecting some text in a rich text document and then making it a link using the [contextual menu](#). When you then click this link, DEVONthink Personal creates the new document using a template you set in the [Editing Preferences](#). In this template, can use the tags below to automatically insert the name of the link, the current date or other information. [See also p. 17ff](#)

- ▶ **%@:** Name of link
- ▶ **%%:** A '%' character
- ▶ **%a:** Abbreviated weekday name
- ▶ **%A:** Full weekday name
- ▶ **%b:** Abbreviated month name
- ▶ **%B:** Full month name
- ▶ **%c:** Shorthand for 'g%X %x,' the locale format for date and time
- ▶ **%d:** Day of the month as a decimal number (01-31)
- ▶ **%e:** Same as %d, but does not print the leading 0 for days 1 through 9
- ▶ **%F:** Milliseconds as a decimal number (000-999)
- ▶ **%H:** Hour based on a 24-hour clock as a decimal number (00-23)
- ▶ **%I:** Hour based on a 12-hour clock as a decimal number (01-12)
- ▶ **%j:** Day of the year as a decimal number (001-366)
- ▶ **%m:** Month as a decimal number (01-12)

- ▶ %M: Minute as a decimal number (00-59)
- ▶ %p: AM/PM designation for the locale
- ▶ %S: Second as a decimal number (00-59)
- ▶ %w: Weekday as a decimal number (0-6), where Sunday is 0
- ▶ %x: Date using the date representation for the locale, including the time zone
- ▶ %X: Time using the time representation for the locale
- ▶ %y: Year without century (00-99)
- ▶ %Y: Year with century (such as 1990)
- ▶ %Z: Time zone name (such as Pacific Daylight Time)
- ▶ %z: Time zone offset in hours and minutes from GMT (HHMM)

METADATA

DEVONthink Personal stores a large number of metadata fields internally when importing documents from the file system, e.g. from PDF, RTF, MP3, EXIF/IPTC, HTML, and email messages as well as from all files that deliver metadata through the Spotlight metadata importer. Here's an (incomplete) list of theoretically supported fields:

General:

- ▶ Title
- ▶ Headline
- ▶ Subject
- ▶ Creator
- ▶ Producer

PDF and RTF:

- ▶ Description

- ▶ Copyright
- ▶ Comment
- ▶ URL
- ▶ Keywords

Electronic correspondence:

- ▶ Authors
- ▶ Author email addresses
- ▶ Recipients
- ▶ Recipient email addresses
- ▶ Email addresses

Electronic publications:

- ▶ Album
- ▶ Composer
- ▶ Contributors
- ▶ Publishers
- ▶ Editors
- ▶ Organizations

VERSION HISTORY

VERSION 2.3.4

This maintenance release prepares DEVONthink Personal for the upcoming sync technology, introduces the new Activity panel, brings interface and usability enhancements, and fixes some minor bugs and glitches. It is recommended for all users of DEVONthink Personal.

DEVONthink Personal and up:

- ▶ **NEW:** [Activity](#) panel.
- ▶ **NEW:** *Copy Frame Link* contextual menu command for movies.
- ▶ **Improved:** Handling of Quick Look panel on OS X 10.6 Snow Leopard and later.
- ▶ **Fixed:** Two issues with tabbed document windows.
- ▶ **Fixed:** Crashes caused by Quick Look on OS X 10.8 Mountain Lion (workaround).
- ▶ **Fixed:** Dragging linked images from Safari stored them as bookmarks since the latest Safari updates.
- ▶ **Fixed:** Bookmarks to pages of PDF documents didn't always work on OS X 10.7 Lion.
- ▶ **Fixed:** Duplicate shortcuts in *Format* popup menu of [Clip to DEVONthink](#) panel.

- **Fixed:** Empty folders were not always deleted e.g. after deleting indexed items.

All editions:

- **NEW:** View option *View > Columns > Aliases* and sorting option *View > Sorting > By Aliases*.
- **NEW:** Number of items in groups and smart groups is now displayed right aligned and gray.
- **NEW:** Creating new documents in Tags view adds them either to the currently selected group tag or to the inbox of the database and tags them with the currently selected (ordinary) tag(s).
- **NEW:** Double-clicking on entries in the *Log* panel reveals them or shows them in the Finder if possible.
- **Improved:** *Data > See Also > Classify* can now also be used when the drawer is already visible, e.g. to close it using the keyboard shortcut.
- **Improved:** Reliability when inserting links and attachments into rich text documents.
- **Improved:** Memory management.
- **Improved:** Overall reliability and performance.
- **Fixed:** Some minor user interface issues on OS X 10.7 Lion.
- **Fixed:** Smart groups using *Item contains aliases* were not always automatically updated.
- **Fixed:** Mouse cursor did not show as arrow over popup and clear buttons of search fields.
- **Fixed:** Reordering items in ordinary tags (inside the Tags group) wasn't possible in unsorted views.
- **Fixed:** *Send by Email* commands were not disabled if no documents were selected.
- **Fixed:** Using services or *Clip to DEVONthink* could cause issues while synchronizing with *DEVONthink To Go*.
- **Fixed:** Spotlight metadata cache didn't always contain all files.
- **Fixed:** Minor bugs and glitches.

VERSION 2.3.3

This release supports Google Chrome bookmarks, and makes it possible to add templates to toolbars. In addition the update brings further minor improvements, e.g. support for Adium chatlogs, and bug fixes.

DEVONthink Personal and up:

- **NEW:** Adium chat logs (.chatlog) can be indexed.
- **Improved:** Compatibility to Mellel's Spotlight support.
- **Improved:** Indexing of OmniOutliner 3 files.
- **Improved:** Saving a document updates the creation and modification dates of imported files, too.
- **Improved:** More reliable indexing of webarchives on OS X 10.6 and 10.7 using Safari 5.1.x.
- **Improved:** PDF services insert the name of the original document into the "Name" field of the group selector again.
- **Improved:** Lookup service searches immediately.
- **Fixed:** Worked around two bugs in OS X 10.7's PDFKit.
- **Fixed:** Double-clicking Mathematica notebooks (.nb) opened them in a new window, not in Mathematica.

All editions:

- **NEW:** Contextual menu command *Update Bookmark* added to web views.
- **NEW:** Support for Google Chrome bookmarks.
- **NEW:** Templates inside the subfolder "Toolbar" can be added to the toolbar of main and search windows, e.g. to easily create new items based on templates.
- **Improved:** Support Assistant.
- **Improved:** English localization.
- **Improved:** About and splash panels updated.
- **Fixed:** Images couldn't be pasted into the *Info* panel to change the item's icon.
- **Fixed:** Newly created plain or rich text documents did not have empty files linked to them.

- **Fixed:** Issue of search engine returning too many results in case of proximity operators followed by multiple other words/operators.
- **Fixed:** Grouping items in the Tags view removed them from their former locations.
- **Fixed:** *Help > Contact Us* did not work if the username contained non-ASCII characters.
- **Fixed:** Position of tag completion popup on additional screens.
- **Fixed:** English, French, and German localizations.
- **Fixed:** More minor bugs and glitches.

VERSION 2.3.2

DEVONthink Personal and up:

- **Improved:** *Sorter* placement.
- **Improved:** Indexing of OmniOutliner 3 files (.oo3), supports compressed XML.
- **Improved:** *File > Update Indexed Items* updates the enclosing group if there's no selection.
- **Fixed:** Various *Sorter* bugs and glitches
- **Fixed:** Popup of PDF text annotations wasn't automatically opened.
- **Fixed:** Multiple tags entered in the *Clip to DEVONthink* panel were concatenated.
- **Fixed:** Modified documents were not saved in some rare cases.

All editions:

- **NEW:** Empty groups are displayed in gray.
- **Improved:** Adding new tags via the Tags bar.
- **Improved:** Links updated for new [DEVONtechnologies website](#).
- **Improved:** Internal enhancements.
- **Fixed:** Some menu items were not disabled in OS X Lion's fullscreen mode.
- **Fixed:** Support Assistant updated for new [DEVONtechnologies website](#).
- **Fixed:** Support Assistant did no longer show tutorials.
- **Fixed:** Customization of toolbars did no longer work on OS X 10.5 Leopard.
- **Fixed:** Various other minor bugs and glitches.
- **Fixed:** French localization.

VERSION 2.3.1

DEVONthink Personal and up:

- **Improved:** Indexing of XML files.
- **Improved:** Indexing of OmniOutliner 3 files (.oo3), working around an issue with OmniOutliner 3.10.x.
- **Improved:** Reliability of the PDFkit framework.
- **Improved:** After entering [advanced search settings](#), a search is immediately performed.
- **Improved:** Toolbar icon of tool for selecting PDF annotations.
- **Improved:** More reliable and faster Spotlight metadata importer plugin.
- **Fixed:** Merging images, e.g. scans, didn't retain the original DPI resolution.
- **Fixed:** PDF documents created by Apache FOP Version 1.x are now imported as read-only as annotating (with DEVONthink Personal or Preview) or printing them to a new PDF destroys their text information.
- **Fixed:** Background process collected too many website previews.
- **Fixed:** Thumbnails of webarchives were updated via Quick Look with poor results after updating them.
- **Fixed:** Exceptions caused by OS X's PDFKit framework after dropping unsupported types on the PDF thumbnail sidebar.

All editions:

- ▶ **NEW:** [Template](#) menu supports custom icons of folders.
- ▶ **Improved:** Shortcut for [Data > Mark > As Flagged](#) changed for compatibility to OS X 10.7 Lion's fullscreen mode.
- ▶ **Improved:** [Window fullscreen mode](#) is restored on app start.
- ▶ **Improved:** Advertisement filter.
- ▶ **Improved:** Handling of storage of background processes.
- ▶ **Improved:** Error logging to system console.
- ▶ **Fixed:** Several issues with smart tagging.
- ▶ **Fixed:** Several minor issues with window fullscreen mode.
- ▶ **Fixed:** Several issues of tagging fields in head-up display panels.
- ▶ **Fixed:** Tag completion popup wasn't always constrained to the current screen on Mac OS X 10.6 Snow Leopard.
- ▶ **Fixed:** [Support Assistant](#) scrolled back to first page after installing an extra.
- ▶ **Fixed:** Capturing from Xcode stores the path of the document instead of the file URL of the frontmost project.
- ▶ **Fixed:** Random bug of *See Selected Text* causing poor results.
- ▶ **Fixed:** Further minor bugs and glitches.

VERSION 2.3

DEVONthink Personal and up:

- ▶ **NEW:** Menu item [Go > Go to Page](#) to go to a page in a PDF document.
- ▶ **NEW:** "addressbook:" bookmarks are displayed using Quick Look (OS X 10.7 Lion or higher)
- ▶ **NEW:** ".f4v" added to list of supported QuickTime extensions.
- ▶ **Improved:** Files skipped while importing, indexing, or synchronizing are [logged](#).
- ▶ **Improved:** Page number of PDF documents in navigation bar is now identical to page labels in the sidebar. Going to a page uses the displayed numbers/labels and supports, e.g., roman numbers, too.
- ▶ **Improved:** *File > Synchronize* renamed to [Update Indexed Items](#).
- ▶ **Improved:** Slightly reorganized [File](#) menu.
- ▶ **Improved:** [Firefox extension](#), should be compatible up to Firefox 10.
- ▶ **Fixed:** Various bugs and glitches affecting the [Sorter](#).
- ▶ **Fixed:** Redraw glitch of PDF and PostScript documents not displaying the first page initially (OS X 10.7 Lion).
- ▶ **Fixed:** *Open With* button of Quick Look panels did not work (OS X 10.7 Lion or higher).
- ▶ **Fixed:** Switching from *Fit To Window* to *Fit To Width* jumped to the first page of PDF documents.

All Editions:

- ▶ **NEW:** Support for OS X 10.7 Lion's full screen mode; see [View > Full Screen > Window](#). The old full screen mode is now available via [View > Full Screen > Document](#).
- ▶ **NEW:** Contextual menu item *Quick Look Attachment(s)* added to preview links and attached files of rich text documents (OS X 10.7 Lion or higher).
- ▶ **NEW:** Double-clicking attachments in rich text documents opens the actual file, if possible, so that it can be edited externally.
- ▶ **NEW:** Dragging cards from Address Book with ⌘ and ⌘ held into a rich text document inserts "addressbook:" links; clicking them opens the card in Address Book, previewing them via the contextual menu (OS X 10.7 or higher) is also possible.
- ▶ **NEW:** Popup menu added to [File > Export > As Text](#) panel to select the desired text encoding.
- ▶ **Improved:** [Preferences > General > Display number of items inside groups](#) no longer counts subgroups, only documents.

- ▶ **Improved:** Advertisement filter (OS X 10.7 Lion or higher).
- ▶ **Improved:** *Exclude Groups from Tagging* is now enabled by default.
- ▶ **Improved:** Storing fav icons of webpages.
- ▶ **Improved:** Twitter handling.
- ▶ **Improved:** Sync Agent plugin, prepared for DEVONthink To Go 1.2.
- ▶ **Improved:** Automatic updates are disabled if an unknown framework is discovered.
- ▶ **Improved:** Overall performance and reliability.
- ▶ **Fixed:** Minor bugs and glitches on OS X 10.7 Lion.
- ▶ **Fixed:** Incompatibility of old full screen mode and the one of OS X 10.7 Lion.
- ▶ **Fixed:** The beginning of text documents was truncated in full screen mode if the tabs bar was visible.
- ▶ **Fixed:** It was possible to duplicate the *Mobile Sync* group.
- ▶ **Fixed:** Navigational dots in Support Assistant did not always indicate the correct page.
- ▶ **Fixed:** Support Assistant used a font not available on all systems.
- ▶ **Fixed:** It's no longer possible to quit the application while an update is installed.
- ▶ **Fixed:** Rare issue causing wrong alerts while entering a license code character by character.

VERSION 2.2.1 – 1.0.1

Skipped.

VERSION 1.0

Initial release.

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