

DEVONthink Pro Office

VERSION 2.4.2
DOCUMENTATION

TABLE OF CONTENTS

Read me	5	Menus	31
The DEVONthink Pro Office advantage	5	The Application Menu	31
System requirements	6	The File Menu	33
Installing, updating, uninstalling	6	The Edit Menu	35
Version history	7	The Data Menu	37
License agreement	13	The Format Menu	39
Credits	13	The View Menu	41
Getting Started	16	The Go Menu	42
Familiarizing yourself with DEVONthink Pro Office	16	The Tools Menu	43
Building Your Database	18	The Window Menu	44
Unleashing DEVONthink Pro Office's Power	21	The Services Menu	45
A Word about Backups	22	The Scripts Menu	45
Tutorials, screen casts, and more	22	The Help Menu	46
Common Tasks	24	The Dock Menu	47
Analyze Text Documents	24	Windows & Panels	48
Archive Your Emails	24	Main Window	49
Archive Printed Documents	25	Document Window	55
Browse the Internet	26	Search Window	56
Capture Data from the Web	27	Info Panel	59
Catalog Your Disks, CDs, and DVDs	27	Document Properties	60
Catalog Your Photos and MP3 Files	28	Concordance	60
Collect Text Snippets and Other Valuable Data	28	Download Manager	61
Index Files on Your Hard Disk	28	History	63
Manage Your Bookmarks	29	Groups & Tags	63
Read Newsfeeds	29	Take Note	64
Take Notes	30	Log	64
Write Texts and Outline Projects	30	Activity	64
		Preferences	64
		Database Properties	65
		Assistant	66
		Documents	68
		General	68
		Plain and rich texts	69
		HTML pages, web pages, feeds	71
		Sheets	73
		Images and movies	74
		PDFs	75
		Office documents, email, and others	76

Drawers & Sheets	78	Troubleshooting	115
See Also & Classify	78	Repairing a defective database	115
Concordance	79	DEVONthink Pro Office crashes when	
Smart Group Editor	79	opened	116
Preferences	81	Recovering a lost password	116
General	81	Items keep re-appearing in the inbox	117
Editing	82	Problems importing files	117
Import	83	Email import does not work as expected	117
Sorter	84	AppleScript scripts do not work as expected	117
Media	84	Problems using Services	117
Colors	85	DEVONthink Pro Office behaves irrationally	118
Web	85	Problems synchronizing with DEVONthink To	
RSS	86	Go	118
Server	87	FAQ	119
Email	88	General questions	119
OCR	89	Release schedules, Mac OS X, and Windows	119
Backup	90	Purchasing	120
Update	90	Mac App Store	121
In & Out	91	Your software license	122
Bookmarklets	91	Product-related questions	122
Dashboard widget	92	Technology	123
Sorter	92	General Concept	123
Archiving email	94	Features	123
Capturing paper	96	Structure	123
Capturing paper (ScanSnap and other		Applications	124
scanners)	98	Other Products	125
Sharing	99	At a Glance	125
Synchronizing (with DEVONthink To Go)	103	DEVONthink	125
Scripts	104	DEVONthink To Go	126
Introduction	104	DEVONagent Pro	126
Installation	105	DEVONagent Express	127
Internal Scripts	105	DEVONagent Lite	128
Browsers, email, RSS readers	108	DEVONnote	128
Triggered scripts	110	Needful Things	129
Droplets, Finder plugins, mail rules, PDF			
Services	110		
More Examples	111		
Automator	112		

Appendix	131
Glossary	131
FAQ (product-specific)	132
Iconology	135
Tagging	135
File Formats	136
Templates	139
Web site export templates	142
Search operators	142
Template tags for Wiki-style links	145
Metadata	145

READ ME

In this chapter:

The DEVONthink Pro Office advantage	5
System requirements	6
Installing, updating, uninstalling	6
Version history	7
License agreement	13
Credits	13

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

- ▶ digital documents
- ▶ notes
- ▶ [paper documents](#)
- ▶ [email messages](#)
- ▶ images
- ▶ multimedia files
- ▶ chat logs
- ▶ bookmarks

together in one database. Use DEVONthink Pro Office 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. [Share your data](#) with colleagues, even when they're using Windows.

THE DEVONTHINK PRO OFFICE ADVANTAGE

WHY DEVONTHINK PRO OFFICE?

DEVONthink Pro Office 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 Pro Office 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 Pro Office intelligently assist you.

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

ADDITIONAL FUNCTIONALITY

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

- ▶ DEVONthink Pro Office features a professional email import tool that allows you to archive messages and even complete mailboxes from Apple Mail, [Microsoft Entourage](#), and from Unix mailboxes. [See also p. 94ff](#)
- ▶ Not every document is digital, and therefore DEVONthink Pro Office allows you to use your [flatbed scanner](#) or [Fujitsu ScanSnap](#) to scan paper documents, make them searchable, and file them in a database. DEVONthink Pro Office can turn [already scanned documents](#) into searchable documents, too. [See also p. 96ff](#)
- ▶ DEVONthink Pro Office allows you to share your documents with your colleagues on your local network or on the Internet. And your Windows, Linux and Unix friends are invited, too. [See also p. 87ff](#)

WHAT CAN YOU DO WITH IT?

DEVONthink Pro Office 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 Pro Office is the #1 tool for collecting and organizing info bits and snippets on the Mac. Use the [Services menu](#), the [Dock menu](#), the [Dashboard widgets](#) and the [Sorter](#) to clip information and jot down notes.
- ▶ With its strong [email archiving](#) and [scanning functions](#), use DEVONthink Pro Office as your true 'paperless office'.
- ▶ DEVONthink Pro Office treats URLs like any other document, so you can integrate Web content and local documents.
- ▶ RSS feeds are the future of how we read news on the screen. DEVONthink Pro Office displays all common newsfeed formats and lets you clip important news directly to your database.
- ▶ Use DEVONthink Pro Office for keeping important emails and other project-related documents together or for building a versatile e-mail archive.
- ▶ DEVONthink Pro Office makes a perfect repository for images you use frequently.
- ▶ With DEVONthink Pro Office'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 in all open databases 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 Pro Office 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 Pro Office 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 Pro Office, simply copy the application package from the disk image to your Applications folder, replacing the old version. Your database(s) will not be affected. If you purchased DEVONthink Pro Office in the Mac App Store you can also download the update from the [DEVONtechnologies website](#). It will retrieve the existing receipt and accept it like as valid license.

32-BIT VS. 64-BIT MODE

When opened in 64-bit mode DEVONthink Pro Office is able to use as much physical memory as is available. This means the size of your databases is only limited by the amount of available RAM and the speed of your computer. However, in 64-bit mode DEVONthink Pro Office uses about 60 percent more RAM than in 32-bit mode.

If you don't need 64-bit mode you can disable it by selected DEVONthink Pro Office application package in the Finder, e.g. by right-clicking DEVONthink Pro Office's icon in the Dock and

choosing *Show in Finder*, opening the Finder's Info panel, e.g. by pressing `⌘I`, and checking *Open in 32-bit mode* in the *General* section.

UPGRADING TO DEVONTHINK PRO (OFFICE)

When you are upgrading from DEVONthink Personal to DEVONthink Professional, the application will copy your existing DEVONthink Personal database to your documents folder ('~/Documents/DEVONthink.dtBase2').

If by any chance it doesn't do this automatically, do the following: Copy the complete folder '~/Library/Application Support/DEVONthink 2' to your Desktop. Then, Rename the folder as you wish and add the filename suffix, '.dtBase2' (without quotes). The folder has now become a DEVONthink Pro Office database icon that you can double-click.

If your old database was created by DEVONthink Personal 1.x, it will be the folder named 'DEVONthink' at '~/Library/Application Support/'. Follow the instructions as above, but in this case use the filename suffix '.dtBase' (no quotes, but case is important). The folder has now become a DEVONthink Pro Office 1.x database. From DEVONthink Pro Office choose *File > Open Database* and select the resulting database file. You will be offered the opportunity to convert the database to a new DEVONthink Pro Office 2.x database. Accept, and you now have a converted DEVONthink Pro Office 2.x database.

Note: It's definitely not recommended to install both DEVONthink Personal and Professional on the same machine. For example, both applications use the same Services menu shortcuts and Mac

OS X would assign the shortcuts sometimes to DEVONthink Personal, sometimes to Professional. In addition, [DEVONagent](#) stores contents in DEVONthink Professional if it's available, otherwise in DEVONthink Personal.

DOWNGRADING TO DEVONTHINK PERSONAL

If you want to downgrade from DEVONthink Professional to Personal, copy the database you want to use to '~/Library/Application Support' and rename it to 'DEVONthink', removing the file name extension '.dtBase2'. The database package becomes a regular folder and will now be used by DEVONthink Personal.

UNINSTALLING

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

- ▶ DEVONthink Pro Office
- ▶ ~/Library/Application Support/DEVONthink Pro 2
- ▶ ~/Library/Mail/Bundles/DEVONMailConduit.mailbundle
- ▶ ~/Library/Preferences/com.devon-technologies.thinkpro.*
- ▶ All DEVONthink Pro Office-specific scripts in ~/Library/Scripts/
- ▶ All DEVONthink Pro Office-specific workflows in ~/Library/Workflows/
- ▶ All DEVONthink Pro Office-specific scripts in ~/Library/PDF Services/
- ▶ Dashboard widgets
- ▶ Bookmarklets from your web browser
- ▶ The reference to the global inbox folder in your Finder's sidebar

VERSION HISTORY

VERSION 2.4.2

This release adds makes scanning multi-page documents much more convenient and adds support for OS X 10.8's Calendar and Reminders apps. It also improves the ScanSnap and ExactScan Pro integration and makes importing references from Bookends faster and more reliable. DEVONthink Pro Office 2.4.2 also improves the first launch experience with a new assistant that guides new users through the first steps, as well as better chosen default options. This update is recommended for all users.

New:

- ▶ New scanner/camera feature supports *Combine into single document* option to easily create named documents with multiple pages. Available for the PDF and TIFF formats; requires OS X 10.7 or later.
- ▶ [Scripts for adding reminders](#) to OS X 10.8's Calendar and Reminders apps.
- ▶ Exporting an image window supports exporting in other formats.
- ▶ *Delete Database* command is now also available in the [File](#) menu.
- ▶ The fullscreen slideshow can be opened also with ⌘ Space.
- ▶ Automatic logging of missing files.
- ▶ First launch assistant.

Improved:

- ▶ ScanSnap and ExactScan integration; now also supports ExactScan Pro.
- ▶ [Scripts > Import > References from Bookends](#) is faster, more reliable and retrieves the title of references (requires Bookends 11.3.3 or later).
- ▶ Recognition of duplicates.
- ▶ Web sharing preferences. [See also p. 87ff](#)
- ▶ *Make Rich Text* automatically shows the ruler again if it was used the last time.
- ▶ Compatibility of RSS style sheets to Retina displays.
- ▶ *File > Export > as Outliner Processor Markup Language* renamed to *as OPML* and *as Rich Text (RTF/RTFD)* to *as RTF/RTFD Document*.
- ▶ The kind of PostScript, EPS, and Illustrator documents is shown not just as "PDF" or "PDF+Text".
- ▶ .emlx files can be indexed on OS X 10.8 "Mountain Lion" again.
- ▶ Handling of email files containing multiple messages.
- ▶ The new scanner/camera feature's queue cleans up after sending files to DEVONthink Pro Office.
- ▶ Better defaults in [Install Add-Ons](#) panel.
- ▶ Log panel and issue logging.
- ▶ Localized sorting of most views
- ▶ Compatibility of web views to web pages using buttons to open new windows.
- ▶ 64-bit support.
- ▶ Memory management.

Fixed:

- ▶ Various bugs and glitches in the new scanner/camera import function.
- ▶ Number of duplicates displayed in [Info](#) panel was not always correct.
- ▶ *Select Group* panel does not leave another apps' full screen mode.
- ▶ Keywords of incoming PDF scans were not retained. In addition, they're now converted to tags.
- ▶ Not all items of the menu *Data > New from template* were disabled in case of read-only databases.
- ▶ Archiving messages or mailboxes from Apple Mail could fail on OS X 10.8 "Mountain Lion" depending on installed third-party software.
- ▶ Moving items to external folders didn't ignore parent groups in the trash.
- ▶ French localization.
- ▶ Further minor bugs and glitches.

Removed:

- ▶ *Scripts > Reminders > Add as Event to iCal*.
- ▶ *Newspaper* RSS style sheet.

VERSION 2.4.1

This maintenance release improves the link handling of templates and fixes a number of bugs, e.g. crashes of the new scan feature.

Improved:

- ▶ Link handling of (smart) templates retains formatting (e.g. the font).
- ▶ Archiving formatted email messages.

Fixed:

- ▶ Handling of label predicates in smart group and advanced search editor.
- ▶ Damaged or incomplete messages could crash the import of email messages, e.g. from Microsoft Outlook or Entourage.
- ▶ Sending documents from the new scanner/camera interface to DEVONthink Pro Office could crash.
- ▶ The second error sheet of the new scanner/camera interface could crash the application.
- ▶ Sorter crashed in 64-bit mode after pressing a hotkey.
- ▶ Undoing the insertion of a blank page into a PDF document removed all pages on OS X 10.8 Mountain Lion.
- ▶ Updated splash screen.

Removed:

- ▶ Obsolete and non-functional *Scripts > Translate* scripts.

VERSION 2.4

This release adds compatibility to OS X 10.8 Mountain Lion and support for new system-wide features such as notifications and sharing services. Thanks to 64-bit support the size of databases is now only limited by the amount of available RAM and the speed of the computer. DEVONthink Pro Office 2.4 brings also other enhancements and important bug fixes. This update is recommended for all users.

Note: Starting with this release DEVONthink Pro Office requires OS X 10.6.8 or later and an Intel-based Mac.

DEVONthink Pro Office only:

- ▶ **Improved:** Apple Mail plugin now compatible to OS X 10.8 "Mountain Lion" (and faster, and more reliable).
- ▶ **Improved:** OCR now retains the keywords of the original PDF and stores entered tags again as PDF keywords, too.
- ▶ **Improved:** Faster importing/archiving of email messages and mailboxes.
- ▶ **Improved:** Encoding support for HTML messages.
- ▶ **Improved:** Embedded web server.
- ▶ **Fixed:** Problems with OCR and e.g. Turkish or Eastern European languages.
- ▶ **Fixed:** Crash after cancelling OCR tasks.
- ▶ **Fixed:** Other minor issues of the OCR plugin.
- ▶ **Fixed:** Graphical glitch of smart groups in web interface on OS X 10.7.4 or later.
- ▶ **Fixed:** Uploading files or taking notes with tags via the web interface.
- ▶ **Fixed:** Rare crashes of email import window.

DEVONthink Pro and up:

- ▶ **NEW:** Apple Mail rule script "Mail Rule - File messages & attachments".
- ▶ **NEW:** Apple Mail rule scripts can be installed via *DEVONthink Pro Office > Install Add-Ons* and easily selected in Mail's rule editor (OS X 10.8 Mountain Lion and later).

- ▶ **NEW:** Folder action scripts "DEVONthink - Import to selected group" and "DEVONthink - Index to selected group".
- ▶ **NEW:** Shortcut $\text{⌘} \text{⌘} \text{W}$ for *File > Close Database*.
- ▶ **NEW:** Script "References from Bookends" to batch import references from Bookends (Bookends 11.3.1 or later).
- ▶ **Improved:** Smart templates for Bookends, EndNote, and Sente (EndNote X4 resp. Bookends 11.3.1 or later).
- ▶ **Improved:** It's now possible to redirect Safari's and Google Chrome's downloads to the inbox folder.
- ▶ **Improved:** Missing favorite databases in the sidebar are now disabled.
- ▶ **Improved:** AppleScript support.
- ▶ **Improved:** Cookie handling of *Download Manager*.
- ▶ **Fixed:** *Delete Database* command of contextual menu of sidebar didn't always work.
- ▶ **Fixed:** Import and index droplets (see Extras folder on disk image) were not compatible to Lion.
- ▶ **Fixed:** Annotation smart template didn't work in views without a view/edit pane.
- ▶ **Removed:** Obsolete *Contextual Menu Plugin* option in the *Install Add-Ons* panel.
- ▶ **Removed:** Obsolete script *Export > Backup to iDisk*.
- ▶ **Removed:** Obsolete EndNote X3 smart template.

DEVONthink Personal and up:

- ▶ **NEW:** Scanning and importing images from digital cameras. This completely rewritten window replaces the former ExactScan Capture and Image Capture options. [See also p. 96ff](#)
- ▶ **NEW:** Dragging entries from Bookends with ⌘ and $\text{⌘} \text{⌘}$ keys held stores rich text references linking back to Bookends (Bookends 11.3.1 or later).
- ▶ **NEW:** Text in Quick Look views/panels is selectable and can be copied.
- ▶ **NEW:** Menu commands *View > Quick Look* and *View > Slideshow* including keyboard shortcuts to toggle the Quick Look panel and its slideshow (like in the Finder).
- ▶ **NEW:** Shortcut $\text{⌘} \text{⌘} \text{A}$ for *Window > Activity*.
- ▶ **Improved:** Option "Safari 5 Extension" of *Install Add-Ons...* panel renamed to "Safari 6 Extension" on Lion and Mountain Lion
- ▶ **Improved:** Stricter recognition of duplicate PDF documents.
- ▶ **Improved:** *Data > New > ...* menu commands create files immediately, e.g. for external editing.
- ▶ **Improved:** Image views support Page Up/Down shortcuts.
- ▶ **Improved:** Page Up/Down keys can be used to navigate inside a visible Quick Look panel without having to activate it via the mouse first.
- ▶ **Improved:** Naming of last used destination in *Take Note* and *Clip to DEVONthink* panels.
- ▶ **Improved:** *Data > Open With* excludes Incredible Bee Archiver.
- ▶ **Improved:** SkimNotes framework updated to version 1.2.9.
- ▶ **Fixed:** Worked around bugs in OS X's PDFKit framework and OS X 10.8 Mountain Lion.
- ▶ **Fixed:** Google Chrome extension installation compatible to now required Chrome Web Store.
- ▶ **Fixed:** Harmless console messages.
- ▶ **Fixed:** *Capture* command of web views didn't work if the page was a PostScript document.
- ▶ **Fixed:** Paginated PDF documents added by bookmarklets, *Clip to DEVONthink* or scripts were not always complete on OS X 10.7 Lion.

All editions:

- ▶ **NEW:** Compatibility to OS X 10.8 Mountain Lion.
- ▶ **NEW:** Simple 64-bit support so that the amount of data and the number of databases is only limited by available real memory and the speed of the computer.

- ▶ **NEW:** *Share* button for sharing the current document or web page via services like iMessage, Mail, Twitter, Facebook, or AirDrop, or to add it to Safari's Reading List (OS X 10.8 Mountain Lion or later).
- ▶ **NEW:** Notifications. Clicking a notification opens the item in DEVONthink Pro Office. (OS X 10.8 Mountain Lion or later)
- ▶ **NEW:** Documents can be moved, replicated, or duplicated by dragging its document icon from the title bar.
- ▶ **NEW:** Video tutorials, available via the Support Assistant or *Help > Tutorials*.
- ▶ **NEW:** Columns URL, Path, Aliases, and Spotlight Comment of search results are editable.
- ▶ **NEW:** Buttons to go to the previous/next highlight added to navigation bar of PDF/text documents.
- ▶ **NEW:** Additional optional toolbar items.
- ▶ **NEW:** Shortcut ^C for *Move To* button of *See Also & Classify* drawer.
- ▶ **NEW:** Autocompletion of tags, e.g. in the *Tags* bar, matches not only prefixes but also substrings.
- ▶ **NEW:** High resolution application icon for Retina screens.
- ▶ **Improved:** Tags in the *Tags* bar and the tags field of the *Info* panel are now sorted.
- ▶ **Improved:** Toolbar search results are automatically hidden after creating new items in three-pane, split, and columns view.
- ▶ **Improved:** Support Assistant shows an activity indicator while loading data.
- ▶ **Improved:** Much faster importing of Spotlight comments if the files/folders are indexed by Spotlight.
- ▶ **Improved:** Templates access the address book only if necessary.
- ▶ **Improved:** Support Assistant and *Help > Contact* no longer access the address book anymore on OS X 10.8 Mountain Lion or when DEVONthink Pro Office was installed from the App Store.
- ▶ **Improved:** Error logging to *Log* panel.
- ▶ **Improved:** Compatibility to TextExpander.
- ▶ **Improved:** French and German localizations.
- ▶ **Improved:** Overall performance, reliability, and memory usage.
- ▶ **Fixed:** Clearing the toolbar search field did not revert the toolbar to text-only mode if necessary.
- ▶ **Fixed:** @ button next to URL field in *Info* panel beeped in case of success.
- ▶ **Fixed:** Typing after newly inserted/created links in RTF(D) documents used blue and underlined style.
- ▶ **Fixed:** Website export of rich text documents containing movies/sounds or viewing them via the web interface didn't work.
- ▶ **Fixed:** *Add tag* contextual menu command didn't work.
- ▶ **Fixed:** Various minor issues in the Support Assistant.
- ▶ **Fixed:** Compiled using Xcode 4.4 and the OS X 10.7 SDK fixing a number of glitches.
- ▶ **Fixed:** More minor bugs and glitches.
- ▶ **Removed:** Obsolete menu command *File > Export > to iPod*.

VERSION 2.3.5

This maintenance release adds scripts for importing email attachments via Apple Mail rules, makes the tutorials easier accessible, improves some aspects of the user interface, and fixes a number of bugs and glitches.

DEVONthink Pro Office only:

- ▶ **Fixed:** *Data > Convert > to Searchable PDF* didn't retain the original name.

DEVONthink Pro and up:

- ▶ **NEW:** Scripts for importing attachments via Apple Mail rules and via the Scripts menu extra.
- ▶ **Improved:** Global smart groups remember the sorting used in the upper/right pane of three-pane views.
- ▶ **Fixed:** Trial time could expire too fast depending on the number of used databases.
- ▶ **Fixed:** *Global Inbox in Save Dialogs* of *Install Add-Ons* panel could temporarily stall the application.
- ▶ **Fixed:** Exporting database archives to the folder containing the database and using the same name failed.

- ▶ **Fixed:** Sente smart template created documents in the database root in some circumstances.
- ▶ **Fixed:** Setting the selection via AppleScript didn't always work.
- ▶ **Removed:** Obsolete script *Scripts > Export > Backup to ZumoDrive*.

DEVONthink Personal and up:

- ▶ **NEW:** [Dashboard widget](#) saves entered notes not yet sent to DEVONthink Pro Office.
- ▶ **Improved:** Indexing PDF and PostScript documents on OS X 10.6 "Snow Leopard" or later.
- ▶ **Improved:** Default position of [Activity](#) panel.
- ▶ **Improved:** Reliability of workaround for OS X 10.8 "Mountain Lion".
- ▶ **Fixed:** *Open Externally* toolbar item is disabled if DEVONthink Pro Office is the default application.
- ▶ **Fixed:** DEVONthink Pro Office no longer lists itself in the *Open With* sub-menu.
- ▶ **Fixed:** Dropping links on the [Sorter](#) didn't work as expected.
- ▶ **Fixed:** PDF documents created by Apache FOP Version 1.x are editable and annotable again.
- ▶ **Fixed:** Resources with unknown MIME types couldn't be added from [DEVONagent Pro](#).
- ▶ **Fixed:** [File > Update Indexed Items](#) could fail in some cases.

All editions:

- ▶ **NEW:** Tutorials are easier accessible.
- ▶ **Improved:** Text views use faster, non-contiguous layouting.
- ▶ **Improved:** [Log](#) panel scrolls automatically to latest entry if sorted by date.
- ▶ **Improved:** Memory management.
- ▶ **Fixed:** Smart groups showed wrong icon on OS X 10.7.4.
- ▶ **Fixed:** Last opened windows aren't restored anymore after a crash or after using *Force Quit*.
- ▶ **Fixed:** Menu items didn't correctly change after registering the application.
- ▶ **Fixed:** More minor issues and rare crashes.

VERSION 2.3.4 – 1.0.1

Skipped.

VERSION 1.0

Initial release.

LICENSE AGREEMENT

PLEASE READ THIS LICENSE CAREFULLY BEFORE USING THIS SOFTWARE. BY USING THIS SOFTWARE, YOU ARE AGREEING TO BE BOUND BY THE TERMS OF THIS LICENSE AGREEMENT. IF YOU DO NOT AGREE TO THE TERMS OF THIS LICENSE, DELETE THE SOFTWARE OR RETURN THE SOFTWARE AND RELATED DOCUMENTATION TO DEVONTECHNOLOGIES, LLC.

1. License: The application and other components (sound and graphics) accompanying this License, whether on disk, in read only memory, or on any other media (the "Software"), and the related documentation are licensed to you by DEVONtechnologies. You own the disk on which the Software is recorded but DEVONtechnologies and/or DEVONtechnologies' Licensor(s) retain title to the Software and related documentation. This License allows you to non-simultaneously use the Software on multiple computers by the same person.

2. Restrictions: The Software contains copyrighted material, trade secrets and other proprietary material and in order to protect them you may not decompile, reverse engineer, disassemble or otherwise reduce the Software to a human-perceivable form. You may not sub-license, modify, rent, lease, or create derivative works based upon the Software in whole or in part. You may not distribute the Software in any form, including, but not limited to, electronic information service distribution, bulletin board distribution, and magnetic or optical medium distribution.

3. Disclaimer of Warranty on Software: You expressly acknowledge and agree that use of the Software is at your sole risk. The Software and related documentation is provided "AS IS" and without warranty of any kind.

4. Limitation of Liability: UNDER NO CIRCUMSTANCES INCLUDING NEGLIGENCE, SHALL DEVONTECHNOLOGIES BE LIABLE FOR ANY INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES THAT RESULT FROM THE USE OR INABILITY TO USE THE SOFTWARE OR RELATED DOCUMENTATION. In no event shall

DEVONtechnologies' total liability to you for all damages, losses and causes of action (whether in contract, tort (including negligence) or otherwise) exceed the amount paid by you for the Software.

Apple, Carbon, Classic, Cocoa, ColorSync, Darwin, Mac OS X, QuickTime, Quartz and all other registered names are trademarks of their respective owners.

CREDITS

ABBBY FINEREADER ENGINE

ABBYY FineReader 8.x Engine Copyright © ABBYY Software Ltd. OCR by [ABBYY Software House](#).

AMINDETERMINATEPROGRESS

Copyright © 2007 [Andreas Mayer](#). All rights reserved.

Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met:

- ▶ Redistributions of source code must retain the above copyright notice, this list of conditions and the following disclaimer.
- ▶ Redistributions in binary form must reproduce the above copyright notice, this list of conditions and the following disclaimer in the documentation and/or other materials provided with the distribution.
- ▶ Neither the name of the copyright holder nor the names of its contributors may be used to endorse or promote products derived from this software without specific prior written permission.

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE COPYRIGHT OWNER OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF

SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

BWTOOLKIT

Copyright © 2009 Brandon Walkin. All rights reserved.

Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met:

- ▶ Redistributions of source code must retain the above copyright notice, this list of conditions and the following disclaimer.
- ▶ Redistributions in binary form must reproduce the above copyright notice, this list of conditions and the following disclaimer in the documentation and/or other materials provided with the distribution.
- ▶ Neither the name of the Brandon Walkin nor the names of its contributors may be used to endorse or promote products derived from this software without specific prior written permission.

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE COPYRIGHT OWNER OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE)

ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

OBJECTIVE-J AND CAPPUCCINO

Copyright © 2008—2009 [280 North, Inc.](#) [Cappuccino and Objective-J](#) are registered Trademarks of 280 North.

IUI

Copyright © iui project group. More information can be found on [the project page](#).

REGEXKITLITE

Copyright © 2008 John Engelhart. All rights reserved.

Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met:

- ▶ Redistributions of source code must retain the above copyright notice, this list of conditions and the following disclaimer.
- ▶ Redistributions in binary form must reproduce the above copyright notice, this list of conditions and the following disclaimer in the documentation and/or other materials provided with the distribution.
- ▶ Neither the name of the Zang Industries nor the names of its contributors may be used to endorse or promote products derived from this software without specific prior written permission.

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE COPYRIGHT OWNER OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS

INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

NDALIAS

Copyright © 2002–2009 Nathan Day. More information can be found on [Nathan Day's homepage](#).

PANTOMIME

Copyright © 2001–2009 [Ludovic Marcotte](#). More information can be found on the [Pantomime homepage](#).

SHORTCUTRECORDER

Copyright © 2006 [Contributors](#) to ShortcutRecorder. More information can be found on the [ShortcutRecorder homepage](#).

SPARKLE

Copyright © 2006–2009 Andy Matuschak
Permission is hereby granted, free of charge, to any person obtaining a copy of this software and associated documentation files (the 'Software'), to

deal in the Software without restriction, including without limitation the rights to use, copy, modify, merge, publish, distribute, sublicense, and/or sell copies of the Software, and to permit persons to whom the Software is furnished to do so, subject to the following conditions:

The above copyright notice and this permission notice shall be included in all copies or substantial portions of the Software.

THE SOFTWARE IS PROVIDED 'AS IS', WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT. IN NO EVENT SHALL THE AUTHORS OR COPYRIGHT HOLDERS BE LIABLE FOR ANY CLAIM, DAMAGES OR OTHER LIABILITY, WHETHER IN AN ACTION OF CONTRACT, TORT OR OTHERWISE, ARISING FROM, OUT OF OR IN CONNECTION WITH THE SOFTWARE OR THE USE OR OTHER DEALINGS IN THE SOFTWARE.

VIDEO JS

Copyright © 2010 [Zencoder, Inc.](#)

The Video JS player is used according to the [LGPL v3](#).

GETTING STARTED

In this chapter:

Familiarizing yourself with DEVONthink Pro Office	16
Building Your Database	18
Unleashing DEVONthink Pro Office's Power	21
A Word about Backups	22
Tutorials, screen casts, and more	22

By now you've installed DEVONthink Pro Office on your computer and are wondering where to start. You probably downloaded the software because you have lots of digital files, and you want to better organize your information, or you want to search for information across a variety of file types and different file locations. DEVONthink Pro Office can help you do that. But how to start?

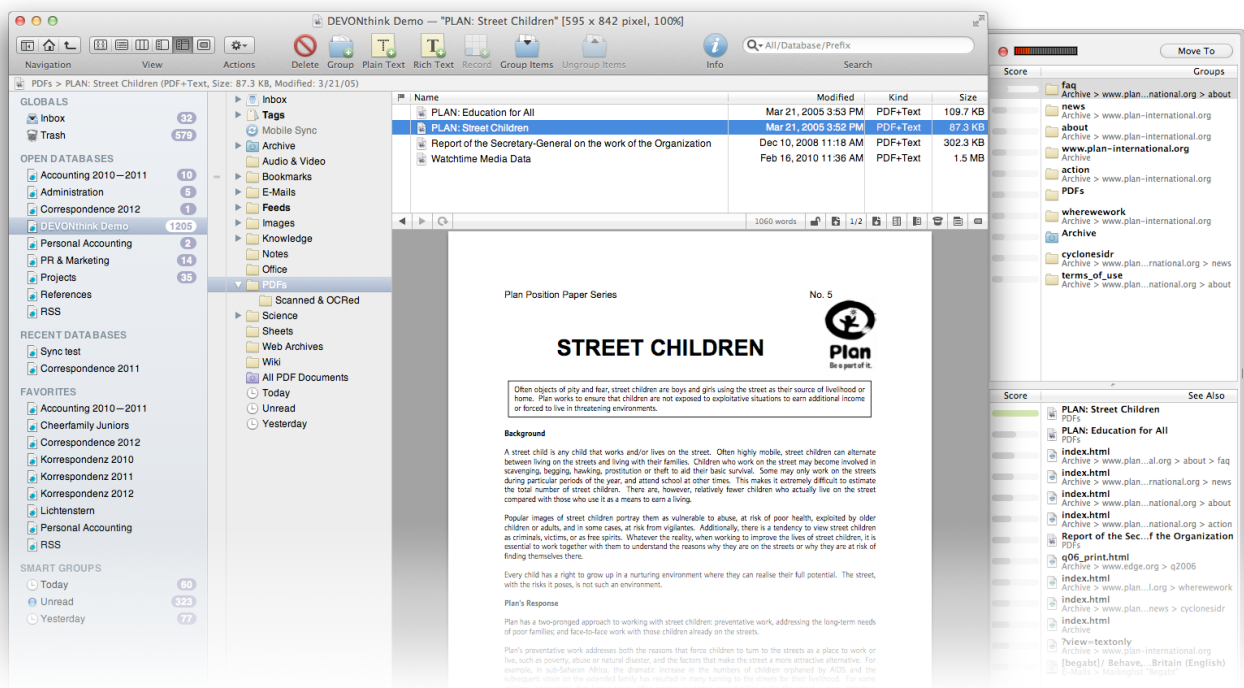
This short guide will help familiarize you with the look and feel of DEVONthink Pro Office, advise you on the best way to build your new databases, brief you on DEVONthink Pro Office's most powerful features, and more.

FAMILIARIZING YOURSELF WITH DEVONTHINK PRO OFFICE

Best begin your learning process by shucking some preconceptions about what the application may be like, and how it may work. Instead of thinking about it as a mere Finder replacement, or a Spotlight substitute, think about your life, and how you like to organize things. Do you save important emails, PDFs, or web pages you like for later viewing? These thoughts will help as you start to figure out what you want to add, or not add, to your databases.

THE INTERFACE

Most of the time, your ability to effectively use a new piece of software is only as successful as your ability to learn how to use the interface. That is why DEVONthink Pro Office's developers have created a clean, easy-to-navigate graphical user interface. This intuitive workspace takes the 'where' and 'how' out of using the software, allowing you to concentrate on the DEVONthink Pro Office's potential.



Unlike applications that are designed to do highly

specific things, such as a calendar or personal information management program, DEVONthink Pro Office is a document/information manager that provides open-ended flexibility to the users to create databases that work for them. Our users have a very broad range of purposes for-- and approaches to-- their databases; creating a one-size-fits-all, cookie cutter document and information manager simply wouldn't work for such diverse users. Neither would deviating from the Mac OS X style; any user of Mail (or any other Apple application) will feel right at home with DEVONthink Pro Office. This is why we think there is no other Mac application that is as 'open' as DEVONthink Pro Office.

The Main Window: The interface that you'll use most of the time is a [view window \(main window\)](#) looking into all or a portion of an open database. It consists of a toolbar and one or multiple panes that give you access to groups, documents, and their contents. Using the icons in the toolbar you can quickly navigate the contents of your database, switch views, create new groups and documents as well as search your database. The *Action* menu (a button with a gear icon) lets you perform frequently used actions without searching for the right command in the menu bar.

Note: You can customize the toolbar to your individual needs by using the menu command [View > Customize Toolbar](#).

What panes you see depends on which [View](#) you have chosen: the List and Icon views show only groups and documents but not their content, the Split and Three Panes views show groups and documents as well as the content of the selected item. You switch views with either via the toolbar or the [View menu](#).

You can open multiple windows for a database, and switch each one to a different view. The [History window](#) offers an additional view on your data, sorted by the date on which each item was actually added to or modified in the database. Finally, the [Concordance window](#) gives you access to your documents through a weighted list of all words contained in your database.

Actions: All items (be they documents or groups) can be put into groups, just like as any files or folders can be put in another folder in the Finder. All commands in DEVONthink Pro Office's menus act either on selected groups or selected documents, and the contextual menu, which appears when you [^] click (right-click) an item, shows the most important commands tailored to the selected items.

Note: Contextual menus are available almost everywhere in DEVONthink Pro Office. If you are unsure what you can do with an item in the user interface, [^] click (right-click) it and see what options the appearing menu offers.

Like the Finder, DEVONthink Pro Office also has an [Info panel](#) that shows additional information about any selected item. It allows you to change the icon of the item by pasting a copied picture or icon onto its icon in the Info panel.

Properties: The [Database Properties](#) show you more in-depth information about your database as well as give you the possibility to open a database by default. Check *Use as Default Database* in the Database Properties to open the current database each time you open DEVONthink Pro Office.

Inbox: DEVONthink Pro Office maintains a special, global group, the 'global inbox'. It is shared between all open databases and is even accessible through the [Sorter](#) when DEVONthink Pro Office is not running. The inbox is the place where new documents end up, e.g., when dropped onto DEVONthink Pro Office's *Dock* icon or when created via the [Services menu](#) commands.

TERMINOLOGY

The user interface for DEVONthink Pro Office should be simple. As you get to know the various layout possibilities, there are indeed only four principle elements you should be familiar with:

- ▶ **Groups:** Like folders in the Finder
 - ▶ **Documents:** Like files; your content, with associated metadata
 - ▶ **Sheets:** [A spreadsheet-like variation](#)
 - ▶ **Replicants:** Like aliases in the Finder, but more flexible; no distinction between original and alias
- [See also p. 21ff](#)

Learn more about the terminology used in DEVONthink Pro Office in the [glossary](#).

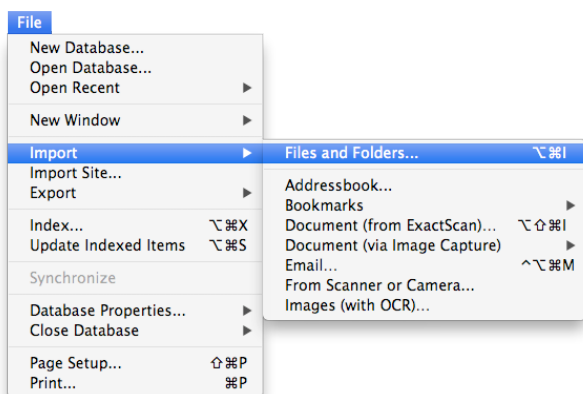
FILE TYPES

One final note before you begin to create databases and add content: it is useful to familiarize yourself with the various file types that can be recognized by DEVONthink Pro Office, and as well as the resulting potentials for how you may then edit these files of various file types once their imported/indexed. Take a look at the [list of supported file types](#) and editing possibilities.

BUILDING YOUR DATABASE

The first step in starting your own custom database, is to create a new database with [File > New Database](#). Give your database an easily recognizable name and choose where you want to save your database, e.g. in your Documents directory. With your new database created, you are ready to turn your attention to adding information.

There are two ways of adding files from your hard disk into the database: [Import](#) (in which case the supported files are copied into the database), and [Index](#) (in which case the database captures text/image information from the externally-linked file if possible, but does not copy the file itself into the database).



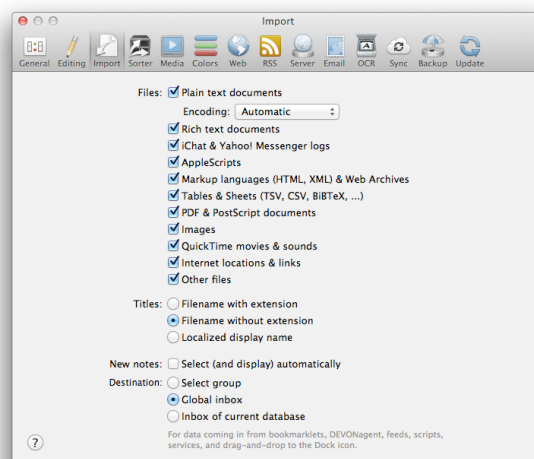
To copy files to the database, use, e.g., [File > Import > Files & Folders](#), or drag-and-drop the file you wish to add (to the DEVONthink Pro Office *Dock* icon, to the [Sorter](#), to the floating [Groups panel](#), or to the groups and documents pane of a view window).

To index to external files, use [File > Index](#), or the equivalent, dragging the file with [⌘](#) and [⌘](#) pressed to DEVONthink Pro Office's *Dock* icon, to the floating Groups panel, or to the groups and documents pane of a view window).

Note: When you choose to index a file contrary to import it, do not delete the indexed external file or your data will be lost.

SIMILARITIES BETWEEN IMPORT AND INDEX

In either mode, Import (copy) or Index (link), DEVONthink Pro Office will capture (in other words: copy) the text of readable file types into the database for searching and analysis. Also, in either mode, DEVONthink Pro Office will ignore unrecognized file types unless the user has checked the *Other file types* option in [Preferences, Import tab](#).



If the *Other file types* option is checked, importing copies all file types to the database package and indexing links to the external files. In both cases a blank document is created that links to the actual file on disk; no text is captured, but the contents of the Info panel (document title, comments, etc.) will be searchable. You can keep all files related to your project or research together in your database instead of storing them in multiple places all over your computer. If Mac OS X is able to display a preview of the file using QuickLook, DEVONthink Pro Office displays a preview as well.

DIFFERENCES BETWEEN IMPORT AND INDEX

Imported or indexed plain or rich text files are directly editable in the document's text pane. Documents in other formats can be edited in their parent application. Saves changes will be taken over by DEVONthink Pro Office.

PROS AND CONS OF USING EACH

There's nothing wrong with using both Import or Index in the same database. You may decide, for example, to import project files but index chatlogs.

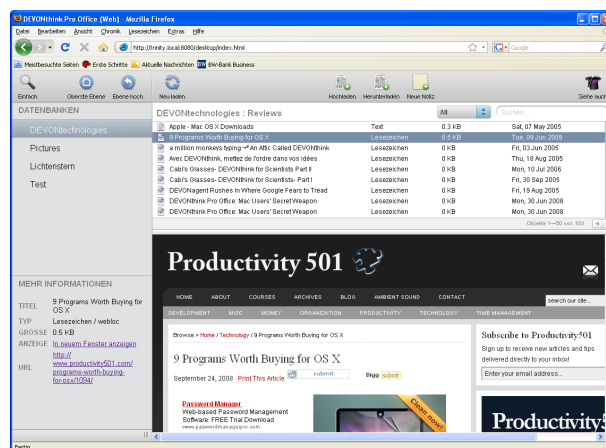
Import results in a more easily portable database (for instance, taking a backup of the database on an external drive or DVD), but yet requires more disk space. Index results in a less easily portable database, but requires less disk space. If you choose to index, keep the external files in your Documents directory. That will make it easier to migrate to another computer later on by moving the complete Documents directory to the new machine.

ADDING YOUR FILES

While you may be tempted to dump every file in your hard disk into DEVONthink Pro Office and sort it out later, you're best off being more selective in what you add (especially as you start). After all, having a large, 'dump it all in' database can contain a lot of files that will do you no practical good (for example, DEVONthink Pro Office can't read your Microsoft Office user profile files), and weeding these files out after-the-fact can be both time-consuming and frustrating.

Here's a practical example: Your iTunes database runs over 22 gigabytes. There's nothing to be gained by simply copying that into a DEVONthink Pro Office database. Copying the iTunes database into DEVONthink Pro Office would result in a large, inefficient, and slow DEVONthink Pro Office database, and would most definitely cripple DEVONthink Pro Office's ability to show off its truly amazing abilities to help manage and use the information content in a well-designed manner (much less perform simple search and organizational tasks).

A topical database approach-- where you create multiple databases, with each holding only like information (for example, a bird watching database full of birding articles, birding newsletters, etc., and a separate quantum physics research database with research briefs, emails, etc.) can improve the effectiveness of DEVONthink Pro Office's artificial intelligence (AI) features. The AI work best within a database that does in fact have contextual relationships among many documents; clogging your new database with everything from A (apple pie recipes) to Z (Zengobi user documents) will only hamper the AI's ability to work effectively.



Having topical databases will help down the road as well. [DEVONthink Pro Office](#) allows you to share your database over the local network or even over the Internet. Imagine having just one database: You decide to share your painstakingly researched academic articles with colleagues, only to find that they're also able to now access your painstakingly saved financial records and chats with your significant other. Not hard to imagine how that has the potential to be both dangerous and embarrassing! Having multiple, topical databases will allow you to share information quickly and easily. Your friends and colleagues will appreciate the forethought (not to mention any embarrassment they might have incurred stumbling onto your saved chat logs).

Summary: What material do you wish others to see, and why? What material do you not wish others to see, and why? These are important considerations as you design your databases. For several reasons, think about creating more than one database, and to keep your databases relatively topical. It's not

difficult to carve out topical areas that don't overlap with multiple databases, and the effort may help you stay more organized.

But no panic if you start with one way of organization and decide later to re-organize your databases. As DEVONthink Pro Office can keep multiple databases open simultaneously, you can easily move documents from one database to the other at any time.

OUR RECOMMENDATION

Even though we wouldn't blame you if you eventually think of DEVONthink Pro Office as your life, it is, indeed, a database application. Like all databases, the larger it is, the more memory it will require in order to run quickly. Your computer, no matter how up-to-date and top-of-the-line, has processing, RAM, and disk space limitations.

One way to keep your life, ehrr, databases, running smoothly is to run multiple databases. Not only is it easy to open multiple of them at the same time, but you'll find that if you 'split' the information on your computer into databases that can be easily categorized (a.k.a. topical databases, see above) you can make DEVONthink Pro Office and your computer perform better (almost instantaneous searching and analyzing information if your computer meets recommended hardware and software specs). Of course, having performance problems with one database is not a problem if you only have a few files in your database. But what about people like a researcher, who has hundreds of gigabytes of files, and who can't seem to stop adding new information on a daily basis? For people like her, multiple, topical databases are the only way to go.

CASE STUDY: BILL'S DATABASE FARM

Bill DeVille, DEVONtechnologies' Evangelist, is very interested in a number of scientific areas. Bill's main database covers interests in environmental science and technology topics, with related interests in science and technology exchanges with developing nations; even some projects dealing with graduate education in environmental sciences and engineering. There's a broad topical relationship, but the content of the database covers many special

disciplines ranging from chemistry, toxicology, statistics, risk assessment, and engineering to economics, legal, regulatory, and policy issues. These disciplines fit together, and information covering all of these topics is necessary in many real-world cases.

As you can imagine from the above description, Bill's main database is a pretty big database, amounting to about 20,000 documents and over 20,000,000 total words. Because there really are relationships knitting together all these scientific, technical, legal, and policy issues, the artificial intelligence features of DEVONthink Pro Office work very well for Bill in researching the database and contextualizing the information.

In addition to his main database, Bill has seven additional databases (so, eight total). For example, he has one database for Apple Newton literature he has accumulated over the years. It's almost as big as his main database, but the topical coverage has no practical relationship to the main database, so Bill keeps the Apple Newton literature in its own domain. If he were to keep the unrelated matters from the Apple Newton database and the main research database in one single database, the result would be a larger, slower database, with poorer performance by the artificial intelligence.

Bill's main database has hovered at about 20,000,000 words for the past couple of years. He often adds topical materials to it that are not related to its main purpose, as mentioned above. If those 'unrelated' topics grow large enough in volume, he spins them off into to a new database. But even with this diligence, the 'core' topics keep growing daily as Bill adds new environmentally related material from the web or other sources.

If you'd like to follow Bill's method, start by creating a database with some collections of files that interest you, and don't be afraid to create other databases that contain 'different' material as your interests-- and main database-- grow. And if you need to search across databases, simply open all of them at the same time. DEVONthink Pro Office searches all of them almost simultaneously.

VERY IMPORTANT: DUPLICATES AND REPLICANTS

One of the things you're likely to come across as your database grows, are duplicates and replicants. Both groups and documents in DEVONthink Pro Office can be [duplicated or replicated](#).

- ▶ Duplicates are simply two copies of the same document. DEVONthink Pro Office automatically recognizes duplicates and shows them in blue.
- ▶ Replicants are items that are filed into more than one place in the database at the same time. A replicated document exists only once in the database but it appears in multiple places. DEVONthink Pro Office shows replicated items in red.

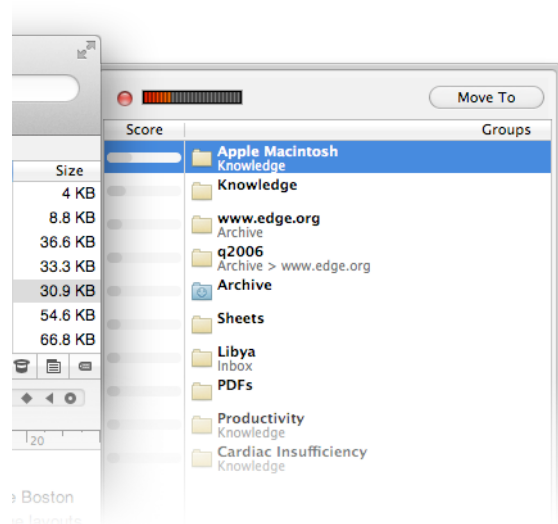
It is important that you understand how replicants work before you begin making changes to documents, as any changes to a replicant are carried over to all replicants; as you might imagine, this means that you can do some very powerful (and potentially negative) things with your database's contents via replicants. Duplicates are also useful in their own way, as you can duplicate contents and modify them without modifying the original document or group. Less powerful than replicants, but no less important in the grand scheme of database organization.

UNLEASHING DEVONTHINK PRO OFFICE'S POWER

DEVONthink Pro Office comes with a number of features that set it apart from most other, less powerful Mac applications: Artificial intelligence and web sharing, to name a few.

I, MAC

DEVONthink Pro Office incorporates artificial intelligence (AI) features like [Classify](#) (which helps you decide where to place new content into the database) and [See Also](#) (which suggests other documents that are contextually similar to a viewed document). These features become more and more powerful as a database grows, especially if you have maintained good organization of all previously added content.



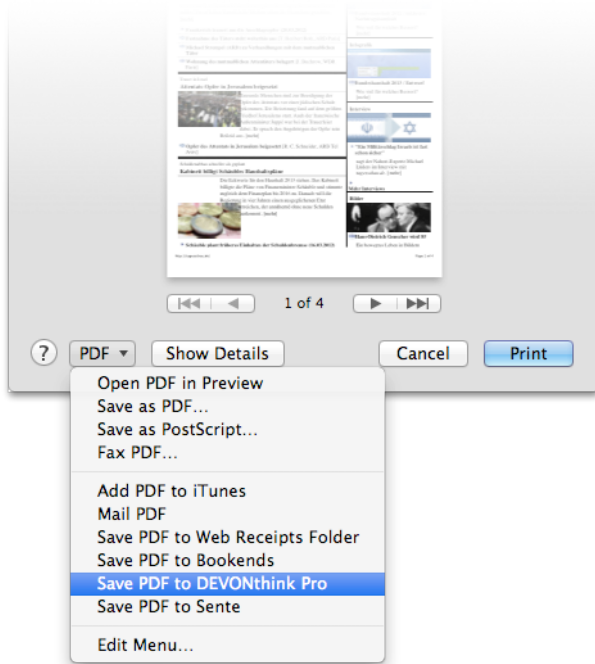
Similar to Classify and See Also are [Auto Group](#) (DEVONthink Pro Office examines a collection of ungrouped items and creates new groups based on contextual similarities) and [Auto Classify](#) (DEVONthink Pro Office classifies and immediately files a document). There is even an AI-powered ranking system built into the [Search](#) function.

These artificial intelligence features set the DEVONtechnologies applications apart from other document managers available today. Indeed, these features can even help you look at familiar data in a new way. For example, [See Also](#) can often suggest relationships between documents that might not have occurred to you.

EXTENSIONS AND AUTOMATIONS

DEVONthink Pro Office is one of the most highly scriptable Mac applications. This flexibility allows you to extend the capabilities of DEVONthink Pro Office with [scripts](#) and automating many, otherwise tedious, procedures.

Please don't be 'put off' if you don't know how to write scripts. DEVONthink Pro Office can probably let you do everything you wish to do without even using scripts. In fact, the purpose of most scripts is not to add features you'd otherwise miss out on, but rather allow you to automate frequently executed manual operations.



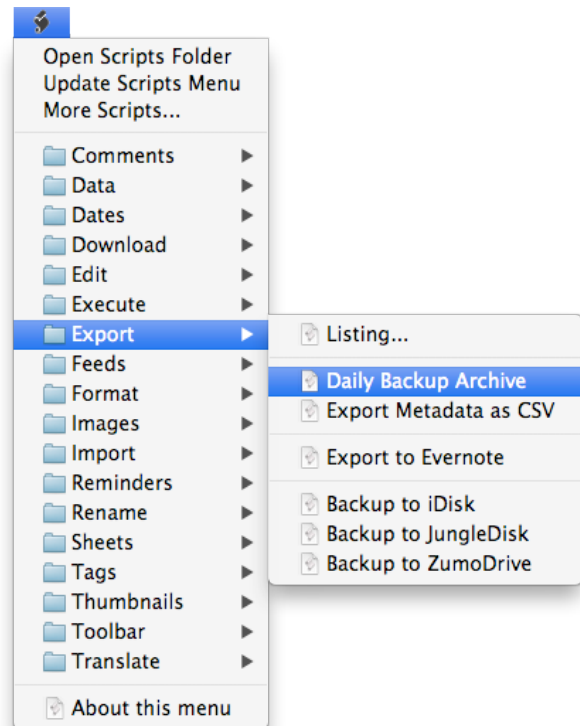
For example, DEVONthink Pro Office provides a [convenient script](#) that automates the process of printing as PDF a document from any application that allows printing, and then allows you to choose the location in the database to which the PDF will be sent. In this case one can accomplish the same end result without using the script, but with a bit more time and effort required.

There is an active discussion board on scripting in the [User Forum](#).

[See also p. 104ff](#)

A WORD ABOUT BACKUPS

Your data stored in DEVONthink Pro Office is valuable, so back it up. DEVONthink Pro Office makes it easy. For creating an internal backup, that means a copy of the index files, inside the database, go to [Tools > Backup & Optimize](#). To create a copy of the whole database that you can then save on a server or a DVD-R, use [Scripts > Export > Backup Archive](#). We strongly recommend you get in the habit of triggering backups whenever you have invested substantial time and effort into modifying the database.



For many users, the value of the data is much greater than the value of the computer that hosts it. There are many things that can go wrong. Your notebook computer could be dropped, lost, or stolen. Your hard drive will fail (it's not a matter if it will, but when). A power outage could corrupt the files on your hard drive. For the truly paranoid (remember, paranoia is sometimes justified), how significant would the loss of your database be if your house or office were to burn down? Avoid insomnia and back up frequently.

Note: As events such as house fires and natural disaster frequently prove, valuable data should probably be kept at more than one location. Consider saving a copy of your backed up information at a secure, off-site location such as [Dropbox](#), the [JungleDisk](#), or a bank safe.

TUTORIALS, SCREEN CASTS, AND MORE

DEVONthink Pro Office is a powerful application so you will need some time to fully master it. Open the [Support Assistant](#) to read tips, tricks, and tutorials, and install pre-made scripts and templates that extend DEVONthink Pro Office's functionality.

Another helpful resource that you should not miss is [our President's blog](#) where Eric publishes last-minute news, important information about our software, and sometimes even public betas.

Take your time to learn how to work with the software-- and how you want the software to work. You'll be rewarded with a powerful assistant for all your information organization needs.

COMMON TASKS

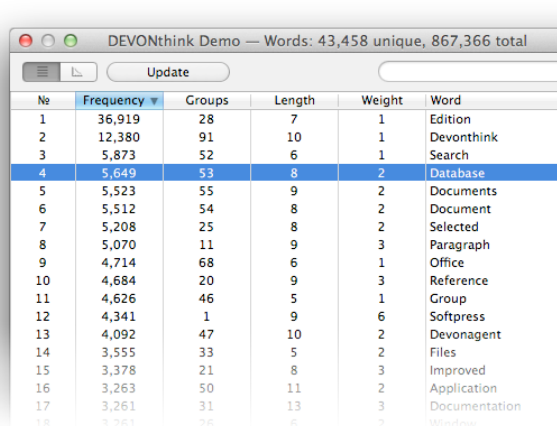
In this chapter:

Analyze Text Documents	24
Archive Your Emails	24
Archive Printed Documents	25
Browse the Internet	26
Capture Data from the Web	27
Catalog Your Disks, CDs, and DVDs	27
Catalog Your Photos and MP3 Files	28
Collect Text Snippets and Other Valuable Data	28
Index Files on Your Hard Disk	28
Manage Your Bookmarks	29
Read Newsfeeds	29
Take Notes	30
Write Texts and Outline Projects	30

In this chapter you'll find an number of common ways how you can use DEVONthink Pro Office 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 Pro Office can be used to analyze large amounts of text documents.



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

Update

Nº	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

The [Concordance function](#) allows you to create a list of all words in a database, sorted by its frequency and restricted to a given length. The *Search* and

Similar buttons open drawers that feature all documents containing words that are contextually similar to the selected word (these searches happen almost instantly). A search toolbar item lets you find any word of interest.

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:

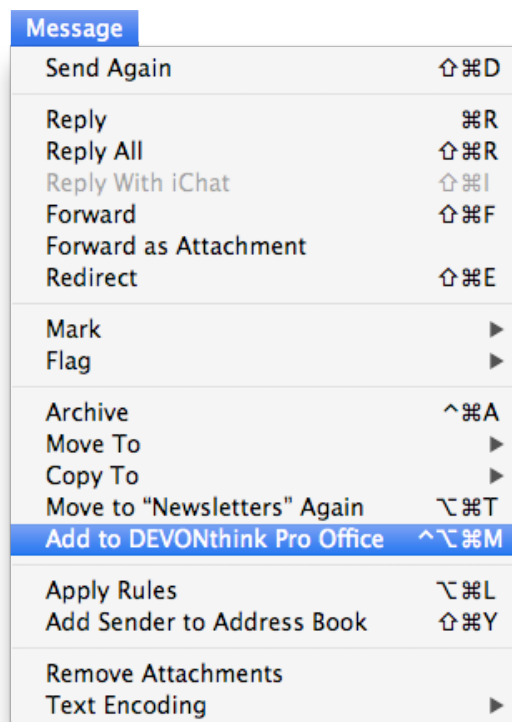
- Analyze the complexity and focus of a given document collection
- Quickly find relationships between documents or snippets
- Clean up large document collections

Continue to read here:

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

ARCHIVE YOUR EMAILS

DEVONthink Pro Office is the repository for emails you want to save.



Its hierarchical groups structure and automatic classification function are perfectly suited to sort in new messages and help you find them again when you need them. DEVONthink Pro Office comes with [advanced email archiving functions](#) that transfer selected messages or mailboxes from Apple Mail, [Microsoft Entourage](#), and all email applications using standard Unix mailboxes, e.g., [Thunderbird](#) or [GNUmail](#) to a DEVONthink Pro Office database. The original structure of the message as well as all attachments are preserved and you can even [reply to messages](#) directly from within DEVONthink Pro Office.

Possible uses:

- ▶ Archive your important correspondence
- ▶ Archive invoices, offers, purchases, or software licenses
- ▶ Store interesting newsbits from newsletters
- ▶ Keep project-related emails and other documents together

Continue to read here:

- ▶ [Archive your email messages](#)
- ▶ [Archive messages directly from within Apple Mail](#)
- ▶ [Reply to archived emails](#)
- ▶ [Organize your data using Classify and See Also](#)

ARCHIVE PRINTED DOCUMENTS

DEVONthink Pro Office is the 'paperless office' solution for the Mac, a central hub for all your documents, paper or electronic.

Using the integrated [scanner support](#) you can directly scan documents, make them searchable through OCR (optical character recognition), and file them in a database. Of course, you can also make your already existing scanned documents searchable. If you are the proud owner of a Fujitsu ScanSnap or another compatible document scanner you can even use the fast auto-feeder to conveniently scan batches of sheets in one go.

You are working in a team, use the [embedded web server](#) to give your colleagues access to your data with an interactive web interface. Even your Windows-using friends are invited.

Possible uses:

- ▶ Archive your important correspondence
- ▶ Archive invoices, offers, purchases, or software licenses
- ▶ Store printed documents together with electronic documents
- ▶ Keep project-related emails and other documents together

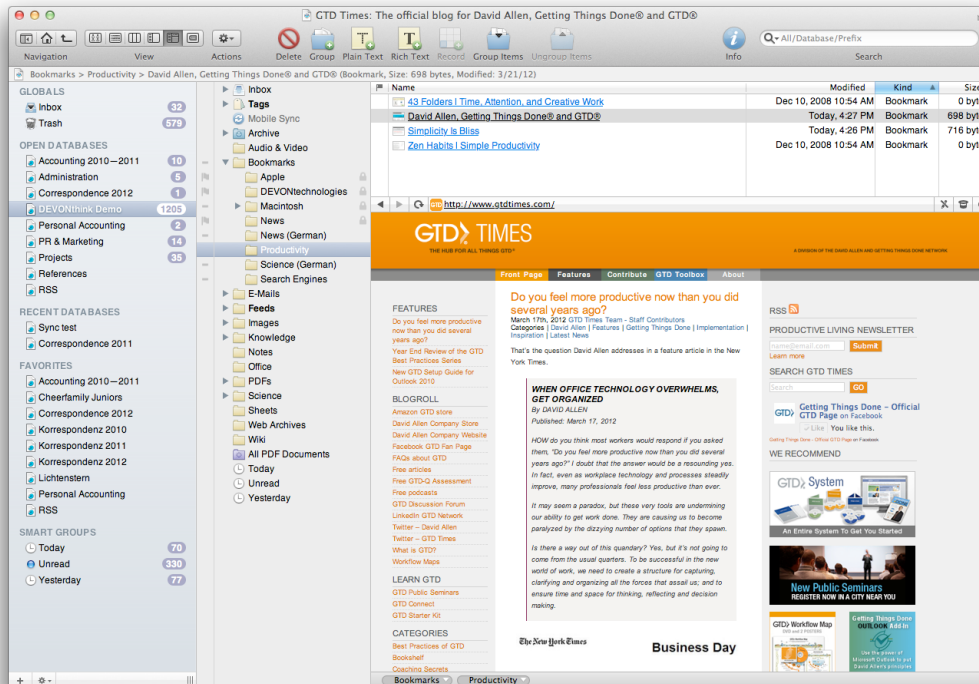
- Keep a central repository for all your team members

Continue to read here:

- [Scan paper documents](#)
- [Scan with the Fujitsu ScanSnap](#)
- [Import existing files with OCR](#)
- [Organize your data using Classify and See Also](#)
- [Share your data with your team](#)

BROWSE THE INTERNET

Besides being a knowledge and information database you can use DEVONthink Pro Office as a [web browser](#). This extends the document-based approach to knowledge to the World Wide Web. Being a database, DEVONthink Pro Office'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 Pro Office 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.

DEVONthink Pro Office also handles [RSS/RDF/Atom news feeds](#), either through feed documents or by simply displaying them via the built-in web browser. Stay up-to-date with your subject and clip important information right away.

Possible uses:

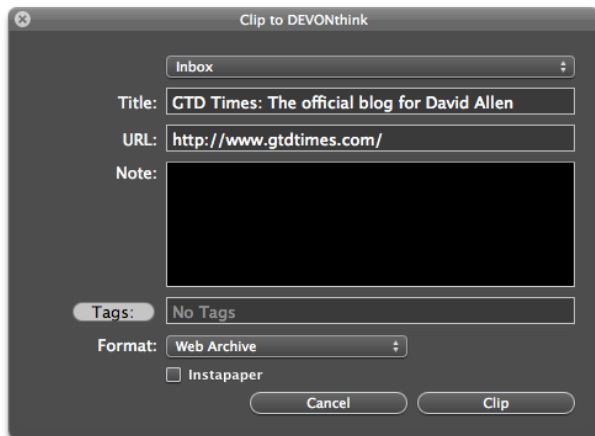
- Visit frequently used web sites in a convenient interface

- Integrate 'live' content from the web with your other documents
- Easily grab data from web sites and store it in DEVONthink Pro Office
- 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](#)
- [Integrate news feeds with your data](#)

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 Pro Office 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 Pro Office.

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 using scripts](#)
- ▶ [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 Pro Office 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 Pro Office, insert the volume, ^ click the file in DEVONthink Pro Office, 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 Pro Office also manages multimedia data such as photos, illustrations, MP3s, or movies.

While never designed to be an iPhoto or iTunes replacement, DEVONthink Pro Office 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 Pro Office, index instead of import them. [See also p. 33ff](#)

Possible uses:

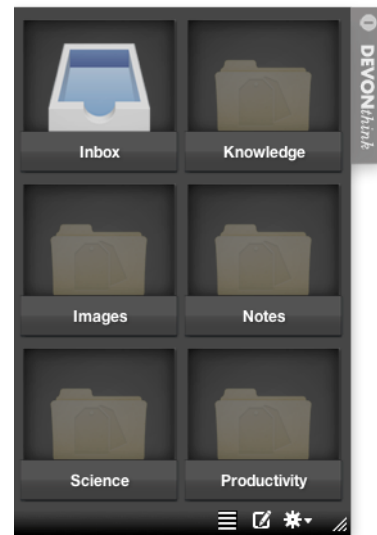
- ▶ Create a dedicated database for photos only
- ▶ View your images in full screen mode
- ▶ Keep project-related images and other documents together
- ▶ Play your MP3s from within your work environment

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 Pro Office 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 Pro Office itself as well as many new Carbon applications, e.g. the Finder or Microsoft Office 2004, support this mechanism. Alternatively drag text clippings to the [Sorter](#) panel.

DEVONthink Pro Office 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 Pro Office 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](#)
- ▶ [Use the Sorter](#)
- ▶ [Drag text clippings to the Groups panel](#)

INDEX FILES ON YOUR HARD DISK

Besides completely importing documents, DEVONthink Pro Office can also simply index files. When indexing files, DEVONthink Pro Office 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 Pro Office.

Possible uses:

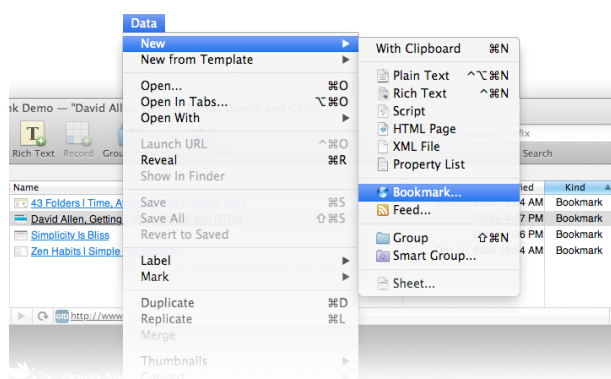
- ▶ Quickly access information from CD-ROMs
- ▶ Create a front-end for your document collection
- ▶ Integrate static documents with other project-related data

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 Pro Office 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 Pro Office loads the page and displays it in the view/edit pane.



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

Possible uses:

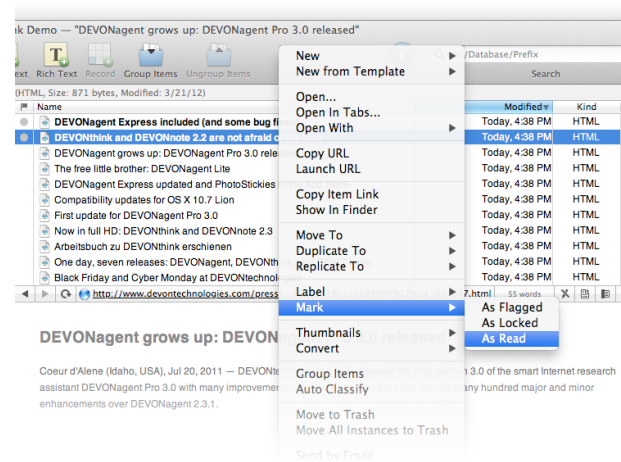
- ▶ Manage your bookmarks
- ▶ Keep project-related web pages and other documents together
- ▶ Visit frequently used web sites in a convenient interface

- ▶ Integrate 'live' content from the web with your other documents
- ▶ Easily grab data from web sites and store it in DEVONthink Pro Office

Continue to read here:

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

READ NEWSFEEDS



DEVONthink Pro Office comes with built-in support for RSS, RDF, and Atom news feeds that makes it also a decent news reader. In addition, its integrated [web browser](#) supports news feeds and displays them like any other web page. Use its document-oriented structure to [organize bookmarks](#) and store news feeds like [Internet-updated smart groups](#).

Mix live news feeds with static documents, e.g. in your project materials.

Possible uses:

- ▶ Read your daily news in a convenient interface
- ▶ Integrate 'live' newsfeeds with your other documents
- ▶ Easily grab interesting information and store it in DEVONthink Pro Office

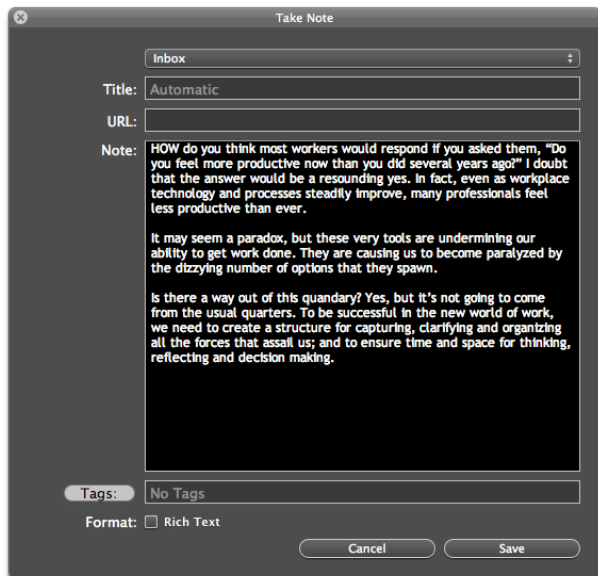
Continue to read here:

- ▶ [Create a new bookmark or HTML document](#)
- ▶ [View 'live' web pages and news feeds](#)
- ▶ [Create a news feed document](#)

- [Copy news from your RSS reader to DEVONthink Pro Office](#)

TAKE NOTES

DEVONthink Pro Office is perfectly suited for taking notes and organizing them.



Use DEVONthink Pro Office'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

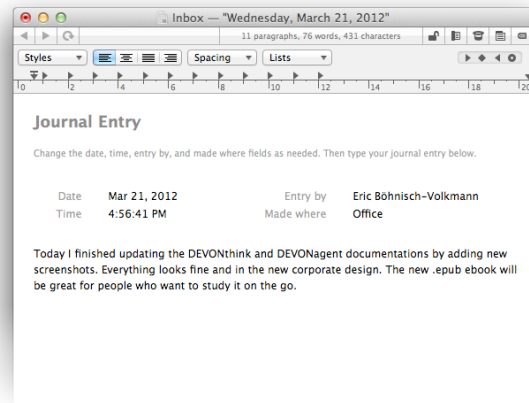
Continue to read here:

- [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 and the full screen mode DEVONthink Pro Office 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 Pro Office 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 Pro Office can also be used as a very simple outliner. Unlike other outliners, DEVONthink Pro Office 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](#)
- [Use the Concordance drawer](#)

MENUS

In this chapter:

The Application Menu	31
The File Menu	33
The Edit Menu	35
The Data Menu	37
The Format Menu	39
The View Menu	41
The Go Menu	42
The Tools Menu	43
The Window Menu	44
The Services Menu	45
The Scripts Menu	45
The Help Menu	46
The Dock Menu	47

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

THE APPLICATION MENU

The *DEVONthink Pro Office* 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 PRO OFFICE, ...

- **About DEVONthink Pro Office:** Shows information about DEVONthink Pro Office including the version number and licensing information.
- **Check for Updates:** Checks if updates for DEVONthink Pro Office are available. By default, DEVONthink Pro Office 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 Pro Office only downloads a file listing the most current versions to your Mac. This option is not available if you have purchased DEVONthink Pro Office 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 Pro Office 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:

- ▶ **Application Scripts:** [Menu extra scripts](#) extending third-party applications, e.g. Mozilla Firefox or NetNewsWire.
- ▶ **DEVONthink Pro Scripts:** [Menu extra scripts](#) providing system-wide functions.
- ▶ **DEVONthink Jot Widget:** Installs the [DEVONthink Jot](#) dashboard widget.
- ▶ **Safari 6 Extension:** The Safari 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:** Opens the [Download Extras](#) page in Google Chrome from where you can install the Chrome extension (similar to the Safari extension). You have to do this manually according to Google's rules.
- ▶ **Firefox Extension:** Similar to the Safari 5 extension but for Firefox.
- ▶ **PDF Services:** Adds an alias of DEVONthink Pro Office to the 'PDF Services' folder so that you can 'print' directly from any application to your database. [See also p. 104ff](#)
- ▶ **Folder Action Scripts:** [Scripts](#) that can be 'attached' to folders and that are triggered when you add new items to that folder. Use them e.g. to add files incoming from a networked scanner or a folder-based workflow to your database. On Mac

OS X 10.6 or later these folder action scripts can be directly used in the Finder.

- ▶ **Apple Mail Rule Scripts:** Installs the [mail rule scripts](#) for Apple Mail on OS X 10.8 or later. Choose them for *Execute Script* action in Apple Mail's rule editor.
- ▶ **Apple Mail Plugin:** A [plugin for Apple Mail](#) allowing you to archive messages or whole mailboxes directly from within Mail.
- ▶ **ABBYY FineReader OCR:** Additional resources needed for [optical character recognition](#) (for making scans searchable). As these resources need to get updated seldomly they have been separated from the application, reducing bandwidth requirements and download times when DEVONthink Pro Office is being downloaded or updated.
- ▶ **Global Inbox in Save Dialogs:** Inserts DEVONthink Pro Office's [global inbox](#) into the Finder's sidebar and all 'Save As' dialog windows. Use it to save directly to the inbox from any application. Note: The name of the inbox is 'Inbox' regardless of your computer's language preferences.
- ▶ **DEVONthink Sorter Helper:** A helper application launching [the Sorter](#) when you log in.

Check your options and click the *Install* button to make DEVONthink Pro Office 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 Pro Office.
- ▶ **Purchase License:** Opens the [DEVONtechnologies Online Shop](#) and puts DEVONthink Pro Office into your shopping cart. If this copy of DEVONthink Pro Office 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 Pro Office publishes its own services. [See also p. 45ff](#)

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, OPEN, OPEN RECENT

New Database: Creates a new database. Give it a name and save it wherever you like in your file system. DEVONthink Pro Office will add the file name extension '.dtBase2' to enable the operating system to recognize it as a DEVONthink Pro Office database package (technically it's a folder).

Open Database: Opens previously created databases. You can select multiple databases. If a database has been saved in version 1.x format DEVONthink Pro Office offers to convert it to the new format.

Open Recent: Presents a list of recently used databases, which is useful to quickly access your frequently used databases. Choose *Clear Menu* to remove all items from the menu.

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 Pro Office 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 Pro Office allows other import modules to be added. DEVONthink Pro Office comes with the following default import plug-ins:

- ▶ **Address Book:** Imports addresses from the Mac OS X Address Book as a sheet, as vcards (.vcf), or as bookmarks. Tip: To import all addresses, select all addresses in the group 'All' and import them. Address cards bookmarks link to the original card in the Address Book application.
- ▶ **Bookmarks:** Imports bookmarks from [Camino](#), [Firefox](#), [Google Chrome](#), [OmniWeb](#), or Safari as bookmarks. Only new bookmarks are imported if you use this command again.
- ▶ **Email:** Import email messages from your email application including threading information, formatting, and attachments. [See also p. 94ff](#)
- ▶ **Images (with OCR):** Imports images, e.g., PDFs, JPEGs, or TIFF files, and applies optical character recognition (OCR) to it. This makes all written text searchable and available to DEVONthink Pro Office's AI functions. The image plus text layer is imported to the database as a PDF document. You can change the [OCR settings](#) in the Preferences window. [See also p. 99ff](#)
- ▶ **From Scanner or Camera:** Imports printed documents from a connected scanner or camera. In addition, DEVONthink Pro Office comes with a built-in OCR (optical character recognition) engine for making scanned documents searchable. [See also p. 96ff](#)

Import Site: Opens the [Download Manager](#) and downloads a complete web page/site for archiving and offline viewing. Make sure the [download options](#) are set correctly, especially the options that define which links DEVONthink Pro Office should follow (if any). All links within the site are modified so that they point to the downloaded images or other embedded objects. This ensures that the page/site can be displayed at any time. Groups created by the Download Manager are excluded from tagging by default.

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 Pro Office almost exactly; metadata files (".DEVONtech_storage") make sure that no metadata such as comments, URLs, etc. are lost. DEVONthink Pro Office 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 Pro Office comes with a variety of plug-ins for exporting documents in different formats as standard. Currently the following plug-ins are available:

- ▶ **as OPML:** Exports the selected items as one [OPML](#) file.
- ▶ **as RTF Document:** Exports the selected items as one large rich text file without embedded images, etc.
- ▶ **as RTFD Document:** Exports the selected items as one large rich text file including embedded images, etc.
- ▶ **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.
- ▶ **as Unix Mailbox:** Exports all selected email messages (of type 'eml', does not apply for email messages converted to rich text using an earlier version of DEVONthink Pro Office) and saves them as Unix mailbox file that can be imported into other email applications.
- ▶ **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 Pro Office 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. 142ff](#)
- ▶ **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 Pro 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.

For images exported from a separately opened document window DEVONthink Pro Office lets you choose the desired file format or image quality.

INDEX, UPDATE INDEXED ITEMS

Index: Adds selected files to your database, but only as references, and not in their entirety. DEVONthink Pro Office 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 Pro Office; 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 noticable 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 Pro Office 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 Pro Office to open this database by default.

Close Database: Closes a selected database (if only one database is open no sub-menu is available).

Delete Database: Closes a selected database and moves it to the Finder trash.

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 Pro Office.

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.

Sheets: Use this sub-menu to add new rows or new columns to a selected [sheet](#), edit, or delete columns. You can select multiple columns in a sheet with ⌘ and ⌘ pressed.

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 Pro Office, 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 Pro Office'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 Pro Office.

- ▶ **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 Pro Office 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](#). You can use the built-in Mac OS X WYSIWYG editor to edit the HTML page or switch to its source code ([from the navigation bar](#)) and edit it directly.
- ▶ **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 Pro Office automatically sets the value of its URL field in the [Info panel](#) accordingly. If you don't type in a name DEVONthink Pro Office looks up the page name on the Internet and sets it automatically for you.
- ▶ **Feed:** Creates a new [news feed](#) document. DEVONthink Pro Office asks for a document name and the URL of the feed. You can change the URL of the feed also later by selecting the feed document and changing the URL field in the [Info panel](#).
- ▶ **Group:** Create a blank [group](#).
- ▶ **Smart Group:** Creates a new smart group, also known as 'saved search'. DEVONthink Pro Office 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.
- ▶ **Sheet:** Creates a new [sheet](#). Add columns to the new sheet by using the + button. Name the columns and sort the sheets by dragging them with the mouse. Click OK to create the new sheet.

New from Template: In addition to these standard document types DEVONthink Pro Office 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 an AppleScript or 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. 139ff](#)

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 Pro Office automatically synchronizes the file when it is being saved to disk by the other application. If you have quit DEVONthink Pro Office 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. 132ff](#)

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 Pro Office, 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 Pro Office 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 Pro Office 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.

DEVONthink Pro Office can also convert image-only PDFs (e.g. scanned documents) to searchable PDFs by applying optical character recognition (OCR). Choose *Convert > to Searchable PDF* to create a searchable PDF from an image-only PDF. The copy is placed next to the selected item, if *Move to Trash* is checked in the [Preferences, OCR tab](#), the original document is moved to the trash when the searchable PDF has been successfully created.

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.

Auto Group Items: This and the following feature *Auto Classify* are some of the intelligent functions that gave DEVONthink Pro Office its name. It tries to find similarities between the selected documents and then group them accordingly. This is most useful, for example, when trying to create some sort of structure out of a few hundred documents that have been randomly clipped from web sites.

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 Pro Office beeps and lists it in the [Log panel](#). If DEVONthink Pro Office 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 Pro Office 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 $\leftarrow$ to insert new items and press $\rightarrow$ and $\uparrow \rightarrow$ 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 Pro Office 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 Pro Office 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 Pro Office 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](#).

Quick Look: Opens the Quick Look panel for the selected items.

Slideshow: VShows the selected items as Quick Look slideshow. Visible only when you visit the View with the `⌘` key held.

VIEW LAYOUT

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

Show/Hide Sidebar: Shows or hides the [main sidebar](#) that lists all open and recent databases, global smart group, the global inbox and the trash.

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 Pro Office 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 Pro Office'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 Pro Office 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 Pro Office 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 the [Three Panes view](#) and 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 Pro Office 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 Pro Office 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.

Concordance: Opens the [Concordance window](#) for a selected database (if only one database is open no sub-menu is shown). The concordance lists all words in the database sorted by frequency. Use it to analyse your accumulated knowledge or to find the most common words.

DATABASE TOOLS

Like any database, DEVONthink Pro Office 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 Pro Office 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 Pro Office 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 Pro Office 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.

DOWNLOAD MANAGER

Download Manager: This command opens the [Download Manager panel](#) of DEVONthink Pro Office. Using the Download Manager, you can download files, or even complete web sites, from the Internet and store them directly in your database.

LOG PANEL

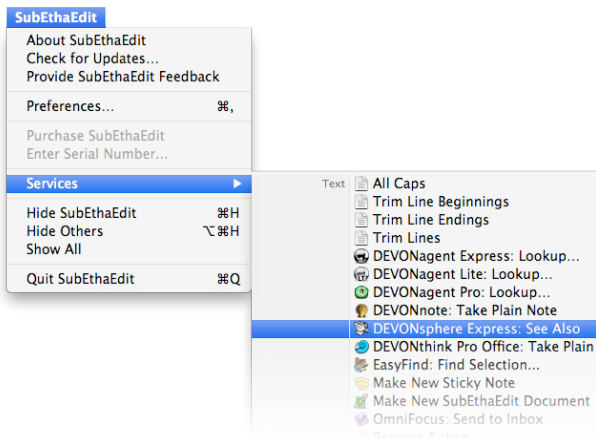
Log: Opens the [Log panel](#). The log lists error messages and warnings that occurred while importing new documents. It also opens automatically when an error occurs. You can save the log to a text file or clear it.

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 Pro Office* > *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 Pro Office publishes its own services in the *Services* menu.



DEVONTHINK PRO OFFICE SERVICES

DEVONthink Pro Office 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 Pro Office'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 Pro Office Services menu items.

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

Summarize: Creates a new note in DEVONthink Pro Office's inbox with a summary of the selected text. DEVONthink Pro Office 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.

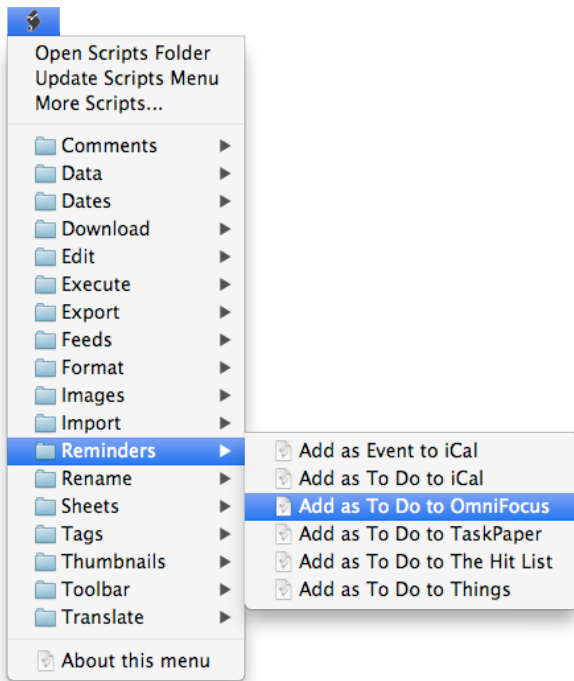
THE SORTER SERVICES

The [Sorter](#) adds another sub-menu to the *Services* menu that contains a *Send To Inbox* command. It copies the current selection to the Sorter's inbox, if possible.

Note: After installing DEVONthink Pro Office 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 Pro Office *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 SCRIPTS MENU

The *Scripts* menu is located left of the [Help menu](#) and shows a stylized AppleScript 'S' symbol instead of a normal menu title. It contains a collection of useful, predefined AppleScripts you can use directly from within DEVONthink Pro Office.



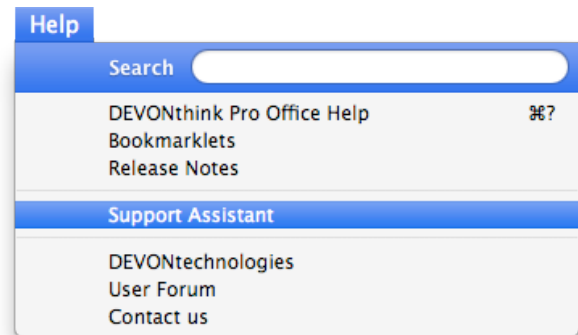
Some of the scripts work without having selected a document, while others require you to select the document you want the script to interact with. In general, the script will tell you what you have to do when you select it from the *Scripts* menu.

Use *More Scripts* to [install additional scripts](#).

Read more about scripts and the DEVONthink Pro Office *Scripts* menu [here](#).

THE HELP MENU

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



DEVONTHINK PRO OFFICE 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](#)

TUTORIALS, SUPPORT ASSISTANT

Support Assistant: Opens the support screen of the [Welcome to DEVONthink Pro Office](#) 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 Pro Office on the Mac App Store all options dealing with licenses or upgrades are not available.

Tutorials: Opens the *Tips and Tutorials* screen of the [Welcome to DEVONthink Pro Office](#) assistant. The tutorials help you getting started by explaining everyday tasks with DEVONthink Pro Office step-by-step. This function requires an Internet connection.

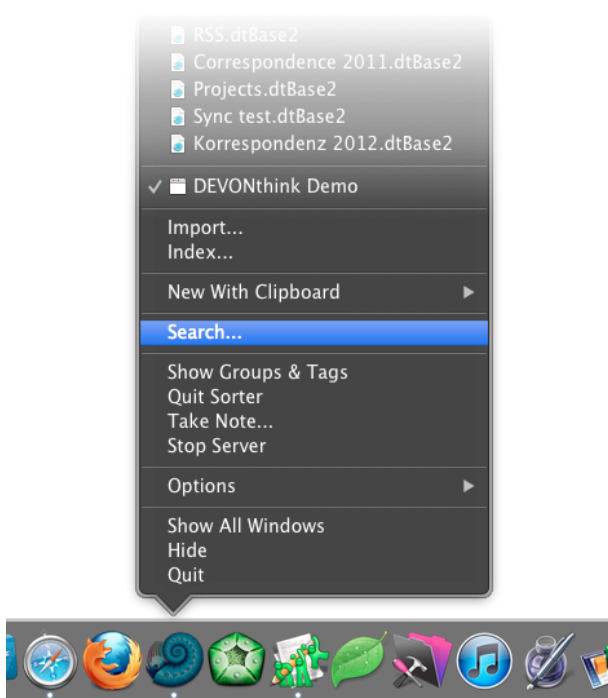
DEVONTECHNOLOGIES

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 Pro Office'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 Pro Office'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 Pro Office to the front.

- **Remove from Dock:** Removes DEVONthink Pro Office from the *Dock*. Only available if DEVONthink Pro Office was added permanently to the *Dock* and is not currently open.
- **Open at Login:** Adds DEVONthink Pro Office to your login items.
- **Show In Finder:** Reveals the DEVONthink Pro Office application package in the Finder.
- **Hide:** Hides all windows of DEVONthink Pro Office.
- **Quit:** Quits DEVONthink Pro Office.

Besides these standard commands, DEVONthink Pro Office 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](#).
- **Start/Stop Server:** Starts or stops the [web server](#).

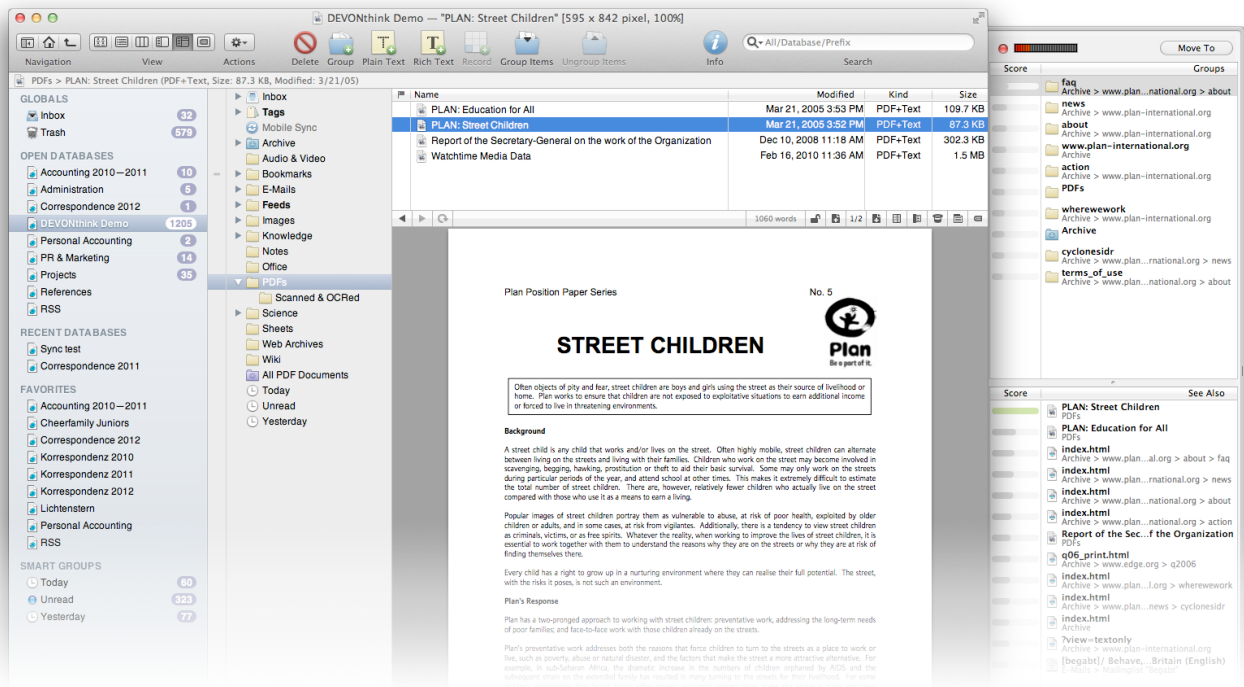
WINDOWS & PANELS

In this chapter:

Main Window	49
Document Window	55
Search Window	56
Info Panel	59
Document Properties	60
Concordance	60
Download Manager	61
History	63
Groups & Tags	63
Take Note	64
Log	64
Activity	64
Preferences	64
Database Properties	65
Assistant	66

DEVONthink Pro Office 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 Pro Office 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 Pro Office 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 another database or group to move it or to the Finder to export it. Click the title bar with ⌘ pressed 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 Pro Office 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. 135ff](#)

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.

SIDEBAR

In the sidebar, which you can show or hide via [View > Show/Hide Sidebar](#), DEVONthink Pro Office lists:

-  The global inbox
-  The trash can
-  All open databases
-  Recent databases
-  Favorites
-  Smart groups
-  Smart groups (selecting by date ranges)
-  Smart groups (selecting by [read/unread](#) status)

Use the sidebar to quickly access your open and recent databases as well as the  [global inbox](#), your favorite databases, groups and news feeds, smart groups, and the  *trash*. Select an open database to switch to it, double-click a recently used database to open it. Read-only databases are marked with a read-only icon. Items dragged to a database in the sidebar are placed in that database's inbox. Collapse or expand sections using the *collapse triangles*.

Using the [contextual menu](#) you can create new databases, open and close them, move them to the Finder trash, empty DEVONthink Pro Office's

 *trash*, create smart groups, open the [Database Properties](#) panel, and add databases to or remove them from the *Favorites*. For the  *Inbox*, most database-related menu commands are available, too, such as [Tools > History](#) or [Tools > Concordance](#). An action menu and a + button give access to commonly used functions, too.

In addition you can use drag-and-drop to move items to the  *Inbox* or the  *trash* or add groups or news feeds to the *Favorites*. When you select a group in the *Favorites*, DEVONthink Pro Office will show that group's contents and even open the database that contains it if necessary. When you drag a [smart group](#) to the sidebar it will be copied to the sidebar; double-clicking a smart group opens the [smart group editor](#) for it.

For the  *Inbox* and the  *trash* DEVONthink Pro Office always shows the number of items contained, independent from the [preferences](#). The *Recent databases* segment does not show databases that are also a favorite to prevent listing them twice.

The sidebar's width and visibility is specific for each database.

ITEMS

DEVONthink Pro Office 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 Pro Office. You can also drag selected items or clippings such as text and images from any application to DEVONthink Pro Office and vice versa.

Press the ⌘ and ⇧ keys to link to the dragged item(s) instead of importing them to the database. For Bookends 11.3.1 or later this adds a formatted rich text instead of a simple reference.

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. 38ff](#)
- ▶ Icons of [feeds](#) or other unread items show an 'unread' indicator in the *State* column. [See also p. 71ff](#)
- ▶ 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. 135ff](#)

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 $\mathbb{A}$ 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 Pro Office 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 Pro Office 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. Also shows or hides the [Sidebar](#)
- ▶ **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.
- ▶ **Scripts:** Gives access to the [Scripts menu](#).
- ▶ **Quick Look:** Opens the standard Quick Look panel for the selected items.
- ▶ **Group +:** Creates an empty group.
- ▶ **Smart Group +:** Creates a new smart group.

- ▶ **Plain/Rich Text +:** Creates a blank plain or rich text document.
- ▶ **Link +:** Creates a new link document.
- ▶ **Sheet +:** Creates a new sheet.
- ▶ **New Record:** Creates a new record (row) in a sheet.
- ▶ **Delete Records:** Deletes selected records (rows).
- ▶ **New Column:** Adds a new column to a sheet.
- ▶ **Delete Columns:** Deletes selected columns.
- ▶ **Columns:** Opens the columns editor, which allows you to rename, reorder, add, or delete columns.
- ▶ **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.
- ▶ **Update:** Updates an indexed item. [See also p. 35ff](#)
- ▶ **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*. Click the search field's search button to return to the standard view. The pop-up menu also lists the last 25 used search terms. Check *Prefix while typing* to let DEVONthink Pro Office 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. 56ff](#)
- ▶ **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.
- ▶ **Refresh:** Refreshes the selected news feeds.
- ▶ **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](#).
- ▶ **Import Email:** Opens the [Import Email](#) window.
- ▶ **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.
- ▶ **Image Capture:** Opens the [Image Capture](#) window for capturing paper documents.

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.
- ▶ **Option-Space:** Opens a fullscreen Quick Look slideshow.
- ▶ **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 Pro Office 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 Pro Office 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.
- ▶ **Reply:** Creates a reply to the selected item. Only available when the selected item is an email message.

- **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.

In the [sidebar](#), the following commands are available:

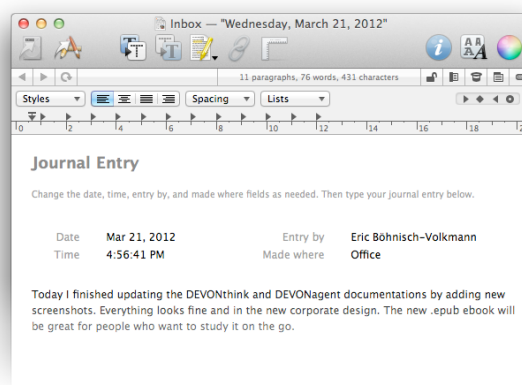
- **New Window:** Opens a new window for the selected database.
- **New Database:** Creates a new database.
- **Open Database:** Opens a selected database.
- **Show in Finder:** Shows the database package in the Finder.
- **Close Database:** Closes the selected database.
- **Delete Database:** Closes the selected databases and moves it to the Finder's trash.

- **Add to Favorites:** Adds the selected database to the favorites.
- **Remove from Favorites:** Removes the selected database from the favorites.
- **Empty Trash:** Empties the trash.

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

DOCUMENT WINDOW

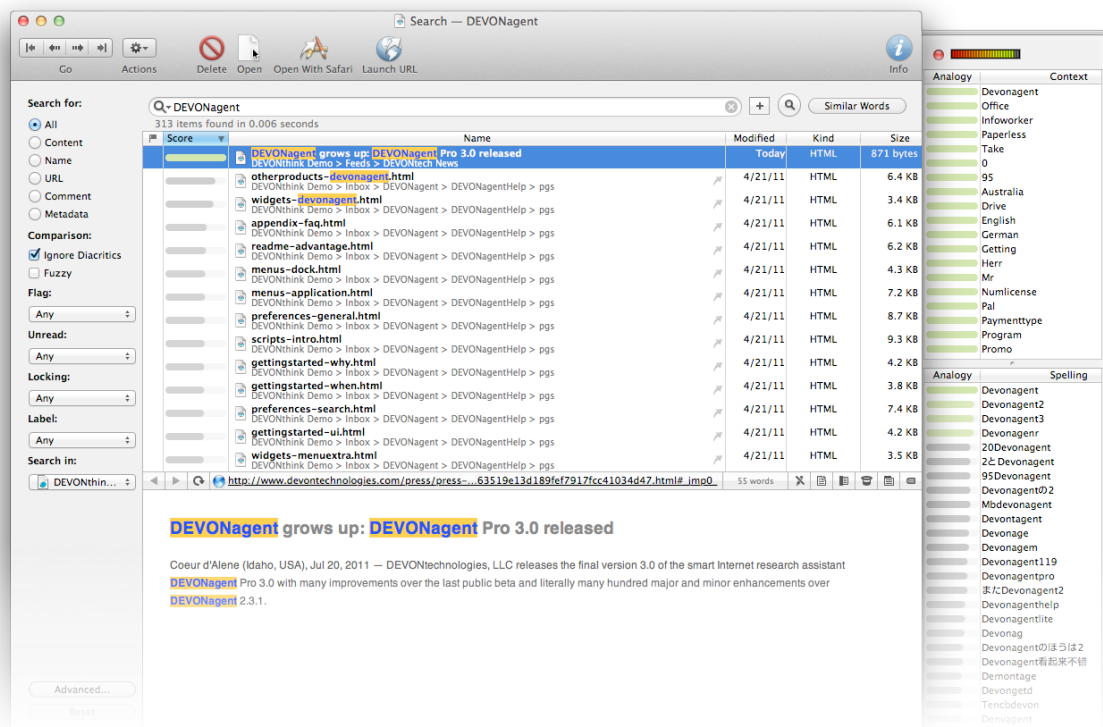
A document window is more or less similar to the view/edit pane of a main window. You open a document window by double-clicking a document in any view of a main window or by choosing *Data > Open* (or any of its equivalents in contextual menus).



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 Pro Office 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 Pro Office 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 Pro Office 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 Pro Office 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. 79ff](#)

SEARCH RESULTS

After a successful search run, DEVONthink Pro Office 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 Pro Office 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 Pro Office window, such as drag a document to another window (or Finder), or export them using [File > Export](#).

[See also/Classify](#) and [Concordance](#) 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. A smart group that searches all databases is placed into the [sidebar](#).

TOOLBAR

The toolbar of the search window offers many tools that are also present in DEVONthink Pro Office 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.
- **Scripts:** Gives access to the [Scripts 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

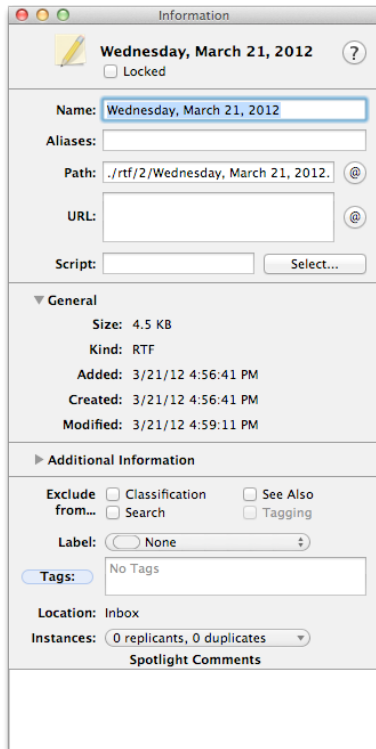
You can manipulate the search results by right-clicking or clicking them with ^ pressed to open the contextual menu, which offers various additional commands.

- ▶ **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*.

ATTACHED SCRIPT

Script: This field allows you to attach an [AppleScript script](#) to any item in DEVONthink Pro Office, documents as well as groups. The script will be executed every time you view the item in a [Split view or Three Panes view](#) as well as when you open it in a separate [document window](#). Click the *Select* button to choose the script to attach.

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. 135ff](#)

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 Pro Office 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 Pro Office synchronizes the Spotlight comments in the Finder with this field in the database.

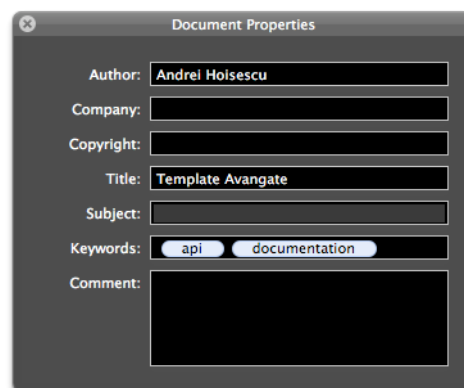
Note: You can modify the comments of multiple selected items at once as long as the comment of all selected items is either identical or empty.

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

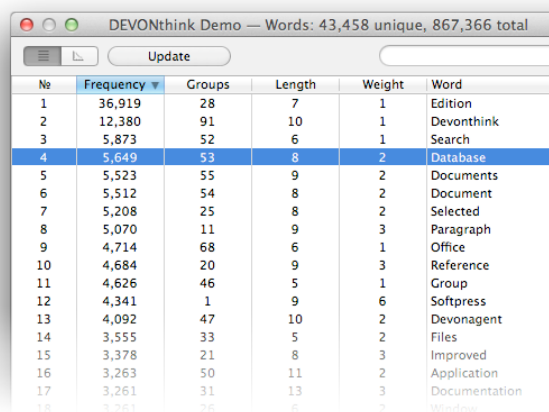
- ▶ Title
- ▶ Subject
- ▶ Keywords
- ▶ Comments



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

CONCORDANCE

The Concordance window, opened with [Tools > Concordance](#), gives you a tool for analyzing the contents of a database.



No	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	8	2	Window

Use the concordance to analyze your data by:

- ▶ Rank number (starting with 1, ascending)
- ▶ Word frequency
- ▶ Number of groups containing items containing a word
- ▶ Word length
- ▶ Word weight (relevance, depends on the contents of the database)

CONCORDANCE LIST

The concordance list shows a list of all words in the database, sorted by frequency or any other criteria, by clicking the according column title. Click the column title again to reverse the sorting order.

You can also filter the list by word length, limiting it to alphanumeric strings (to omit character/number combinations) by entering the minimum and maximum word length at the bottom of the Concordance window and by checking/unchecking the *Alphanumeric* switch. Click the *Update* button at the top of the window to update the list after you have changed some parameters.

To find a word in the list, enter it into the search field at the top of the window. Select any word, and click the *Search* button at the bottom of the window to open a drawer containing all documents that contain this word, sorted by relevance. Click *Similar* to show a list of words that are contextually similar to the selected word.

DRAWERS

You can manipulate the items in the drawer opened by the *Search* button in various ways. Drag them to the item list to move them to another location, double-click them to open them in a separate window, or [⌘] click (right-click) them to open the contextual menu (which shows basically the same options as the contextual menu for [See Also drawers](#)). Press *Space* to show a Quick Look preview for the selected item. To close the drawers, click the *red close button*.

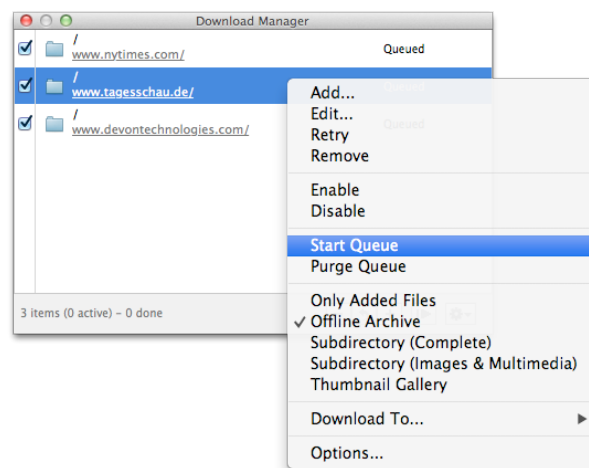
FREQUENCY GRAPH

You can switch between the frequency graph and the concordance list by clicking the *Graph* and *List* buttons in the upper left corner of the concordance window.

The frequency graph shows a graph of the word frequency over the rank number of the word (see above). Change the sorting in the concordance list to get different results, such as a graph of frequency over number of groups. You can influence the graph also by limiting the word length or by omitting alphanumeric strings and clicking the *Update* button.

DOWNLOAD MANAGER

[Window > Download Manager](#) opens DEVONthink Pro Office's Download Manager panel. Using the Download Manager, you can download files or even complete web sites from the Internet and either store them directly in your database or as files on your hard drive.



PANEL ELEMENTS

The Download Manager panel consists of:

- ▶ A list of items to be downloaded
- ▶ A status bar at the bottom
- ▶ A *+* button for adding items to and a *-* button for deleting selected items from the list
- ▶ A *reload* button (backwards arrow)
- ▶ A *go/stop* button (play/pause icons)
- ▶ An *Action* menu (gear icon)

ADDING FILES

To download a web site or any other file, simply add it to the Download Manager by dragging its URL to the Download Manager panel. Alternatively, you can click the *+* button in the panel and add the URL yourself as well as a referrer, user name, and password. If *Automatic* is checked, DEVONthink Pro Office creates a referrer automatically when downloading whole web sites.

You can also paste one or more URLs (for example, copied Safari bookmarks, DEVONthink Pro Office links, or copied links from [DEVONagent Pro's](#) Download Manager), or add files to the Download

Manager by using the contextual menu in web and HTML views.  clicking a link also adds it to the Download Manager.

Note: You can also copy URLs in the Download Manager to the Clipboard or drag them to other applications (like the Finder or Safari's bookmark manager). The Download Manager also supports URLs for local files (POSIX path, a 'file://localhost/' URL, or a 'file:/// ' URL).

THE ACTION MENU

Most actions are available through the *Action* menu or the contextual menu. Click the *gear button* or  click an item in the Download Manager panel to display more commands:

- ▶ **Add:** Add another file to the list.
- ▶ **Edit:** Edit the parameters of a selected item in the list.
- ▶ **Retry:** Tries to reload an item that failed to download.
- ▶ **Remove:** Removes the selected items from the list. Alternatively, you can press the *Delete* key.
- ▶ **Enable/Disable:** Checks or unchecks the selected items. Only checked items will be downloaded.
- ▶ **Start/Stop Queue:** Starts or stops the download queue. Same as the *play/pause* buttons at the bottom of the panel.
- ▶ **Purge Queue:** Removes all items from the list that have been completely downloaded.
- ▶ **Only Added Files to Thumbnail Gallery:** Various predefined option sets (see below).
- ▶ **Import Files to Database:** Select into which database the downloaded files shall be stored. Select *Folder* to save them not in a database but directly to the file system.
- ▶ **Options:** Opens the options dialog sheet that allows you to specify in detail what to download, which links to follow, and where to store the downloaded files (see below).

For your convenience, DEVONthink Pro Office comes with predefined option sets that you can directly select from the action menu.

- ▶ **Only Added Files:** Downloads only exactly the files you have manually added to the Download Manager.

- ▶ **Offline Archive:** Downloads the files you have added to the Download Manager including embedded images, style sheets, and scripts. Use this options set to archive/download web pages with everything necessary to display them properly. Alternative: [Create a web archive](#).
- ▶ **Subdirectory (Complete):** Downloads the files you have added to the Download Manager including all other embedded files or files linked to them. Also, this option set follows all links leading to (items in) sub-directories. Use this option set to download, for example, a complete web site for offline archiving.
- ▶ **Subdirectory (Images & Multimedia):** Same as above, but downloads only linked images, linked multimedia files including Flash and QuickTime movies, and embedded images in the item's directory and all sub-directories. Use this set to download, for example, a complete web site for offline archiving (without all linked Office documents, PDFs, etc.)
- ▶ **Thumbnail Gallery:** Downloads the files you have added to the Download Manager including linked images, embedded images, style sheets, and scripts. Use this options set to download, for example, a thumbnail gallery including all full-size images linked to each thumbnail for offline archiving.

Note: Downloaded items are by default excluded from classification and tagging.

OPTIONS

The options dialog defines which file types the Download Manager should download, which links it follows, and where it stores the files.

- ▶ **Files:** Check all file types you want the Download Manager to download (plain texts, rich texts, Office documents and PDF files, style sheets and scripts, images, embedded images, multimedia files, mark-up language files, etc.) With the *Follow Links* pop-up menu define how far DEVONthink Pro Office should follow links on the downloaded HTML pages (see below). Check *Overwrite existing* to update an already existing archive.
- ▶ **Folder:** When you choose *Download to > Folder* in the action menu of the Download Manager panel, DEVONthink Pro Office stores all downloaded

items in the directory you specify here. Click **Set** to choose your preferred location. Use this option to use the integrated Download Manager for downloading, for example, software archives or other files you don't want to store in your database. Double-click any part of the location to reveal it in the Finder.

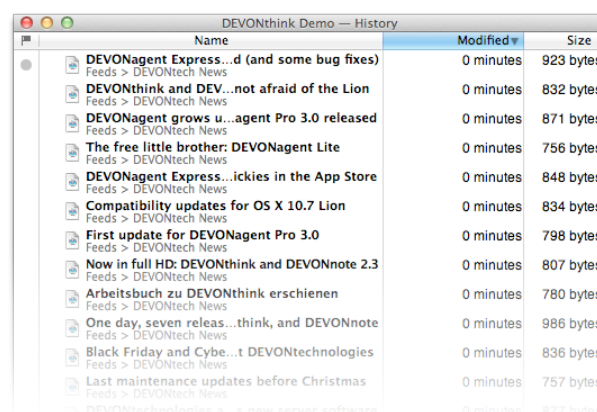
- **Download:** Define how many connections the Download Manager opens at the same time (fewer connections for slower Internet connection, more for DSL or broadband). Also, check *Automatically purge queue* to have previously downloaded items automatically removed from the queue.

The *Follow Links* options defines how far DEVONthink Pro Office follows links on the downloaded HTML pages, and so allows you to control if only the actual pages get downloaded or a complete web site. DEVONthink Pro Office supports the following options:

- **Off:** Do not follow any links.
- **On Same Host:** Follows links but only as long as they refer to the same web server, like the same web site. Files on other web servers will not be downloaded.
- **In Same Directory:** Follows links but only as long as they refer to items in the same directory as the downloaded HTML page.
- **In Subdirectories:** Follows links, but only as long as they refer to items in the same directory as the downloaded HTML page or in its sub-directories.
- **One Level:** Follow all links regardless where they point to, but only one level deep. Links on pages linked to from the original page are not downloaded.
- **Two Levels:** Follow all links regardless where they point to, two levels deep. Attention: This can result in very large downloads!

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).



Name	Modified	Size
DEVONagent Express...d (and some bug fixes) Feeds > DEVONtech News	0 minutes	923 bytes
DEVONthink and DEV...not afraid of the Lion Feeds > DEVONtech News	0 minutes	832 bytes
DEVONagent grows u...agent Pro 3.0 released Feeds > DEVONtech News	0 minutes	871 bytes
The free little brother: DEVONagent Lite Feeds > DEVONtech News	0 minutes	756 bytes
DEVONagent Express...ickies in the App Store Feeds > DEVONtech News	0 minutes	848 bytes
Compatibility updates for OS X 10.7 Lion Feeds > DEVONtech News	0 minutes	834 bytes
First update for DEVONagent Pro 3.0 Feeds > DEVONtech News	0 minutes	798 bytes
Now in full HD: DEVONthink and DEVONnote 2.3 Feeds > DEVONtech News	0 minutes	807 bytes
Arbeitsbuch zu DEVONthink erschienen Feeds > DEVONtech News	0 minutes	780 bytes
One day, seven releas...think, and DEVONnote Feeds > DEVONtech News	0 minutes	986 bytes
Black Friday and Cybe...t DEVONtechnologies Feeds > DEVONtech News	0 minutes	836 bytes
Last maintenance updates before Christmas Feeds > DEVONtech News	0 minutes	757 bytes
DEVONtechnologies a... a new server software Feeds > DEVONtech News	0 minutes	877 bytes

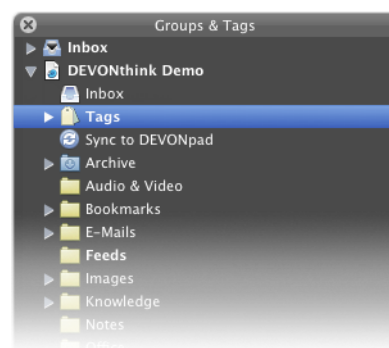
Sort the list by name, age, or file size by clicking the column titles (click again to reverse the sorting order), and by any other criterum using [View > Sort](#). Customize the columns using [View > Columns](#).

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

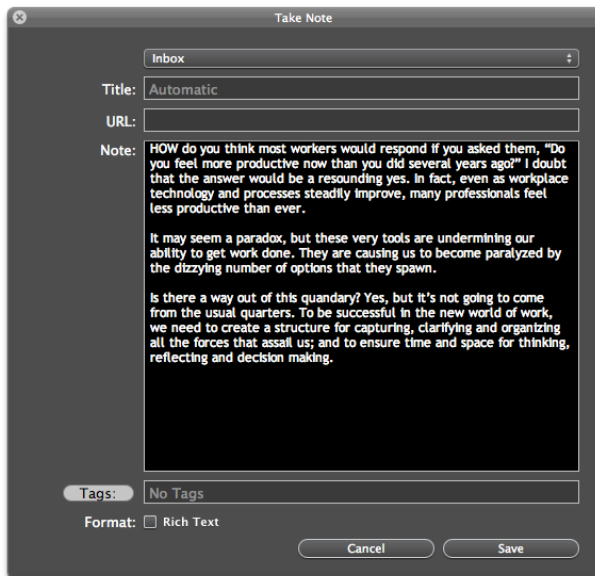
The *Groups & Tags* panel, opened using [Tools > Show Groups & Tags](#), gives you direct access to all open databases and their groups including the tags inside the special Tags group. Use it, e.g., to drag items directly to a group or tag or to rearrange groups. You can also apply menu commands to 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 Pro Office can get the URL of the frontmost application, e.g. from Safari, it will also insert it automatically into the URL field.



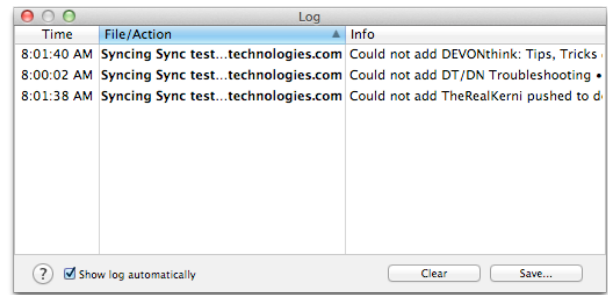
Check *Rich Text* to take a rich text note. Use the [Format](#) menu to style your note.

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

Note: For this function DEVONthink Pro Office 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. Copy information from the log to the clipboard with [Edit > Copy](#), $\text{⌘}C$, or the contextual menu.

ACTIVITY

The Activity panel shows a list of currently running background processes, e.g. converting scans to searchable PDFs, refreshing news feeds, and 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.

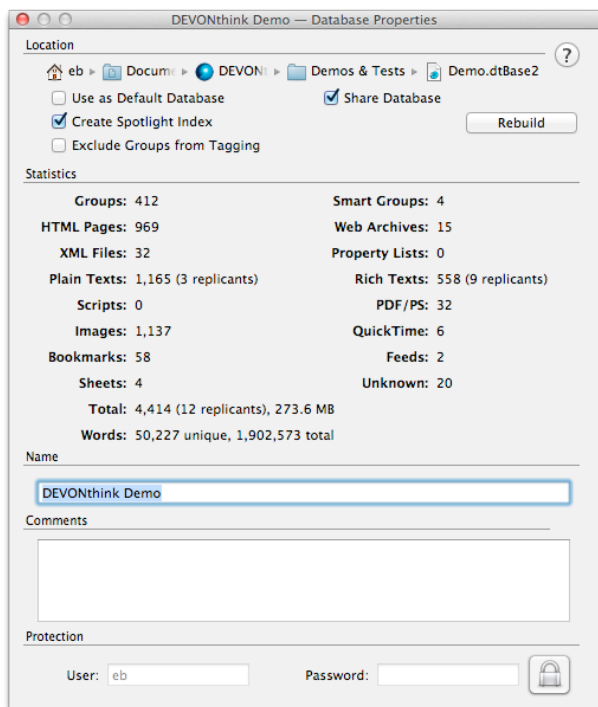
PREFERENCES

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

Use as Default Database: Check to open this database every time you open DEVONthink Pro Office.

Create Spotlight Index: Check to make this database available to Spotlight. Checking this option lets DEVONthink Pro Office 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 Pro Office 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 Pro Office 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 or after using a third-party utility like [DevonSync](#).

Share Database: Check to make this database searchable and browsable through the [web server](#).

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.

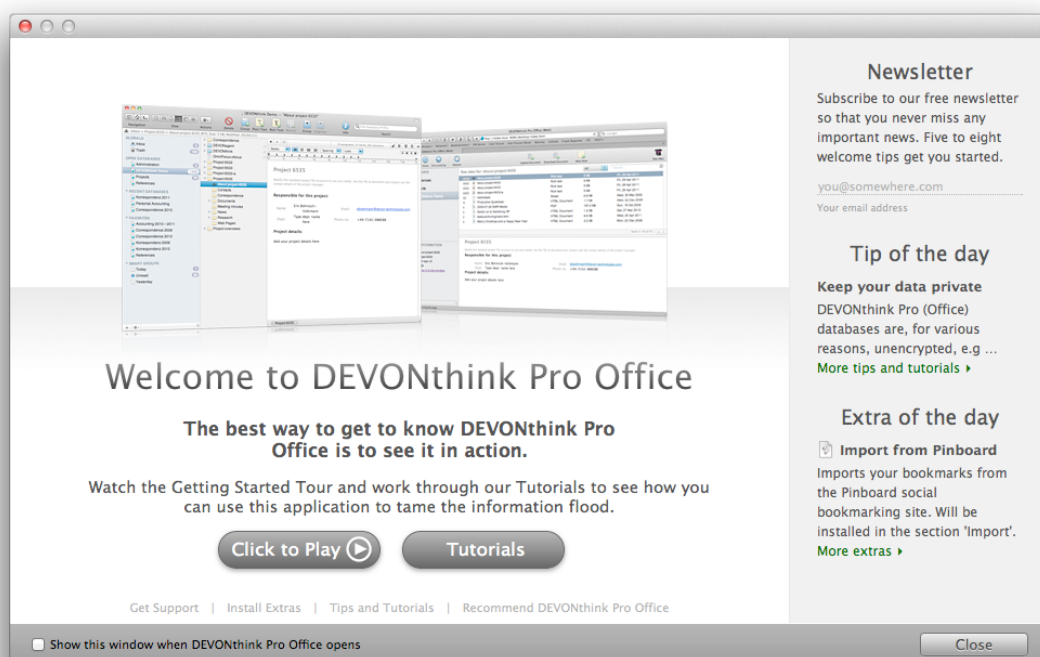
PROTECTION

To prevent other people from opening DEVONthink Pro Office 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 Pro Office 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 a first launch assistant, tips, tutorials, installable extras, and a support page that guides you through the available support options.



WELCOME

This screen welcomes you when you start DEVONthink Pro Office 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.

FIRST LAUNCH ASSISTANT

The first launch assistant opens automatically the very first time you open DEVONthink Pro Office and guides you through the first steps with the application: creating a new database, installing the add-ons, and adjusting the preferences.

GET SUPPORT

The support screen guides you through the three common steps for troubleshooting DEVONthink Pro Office. 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

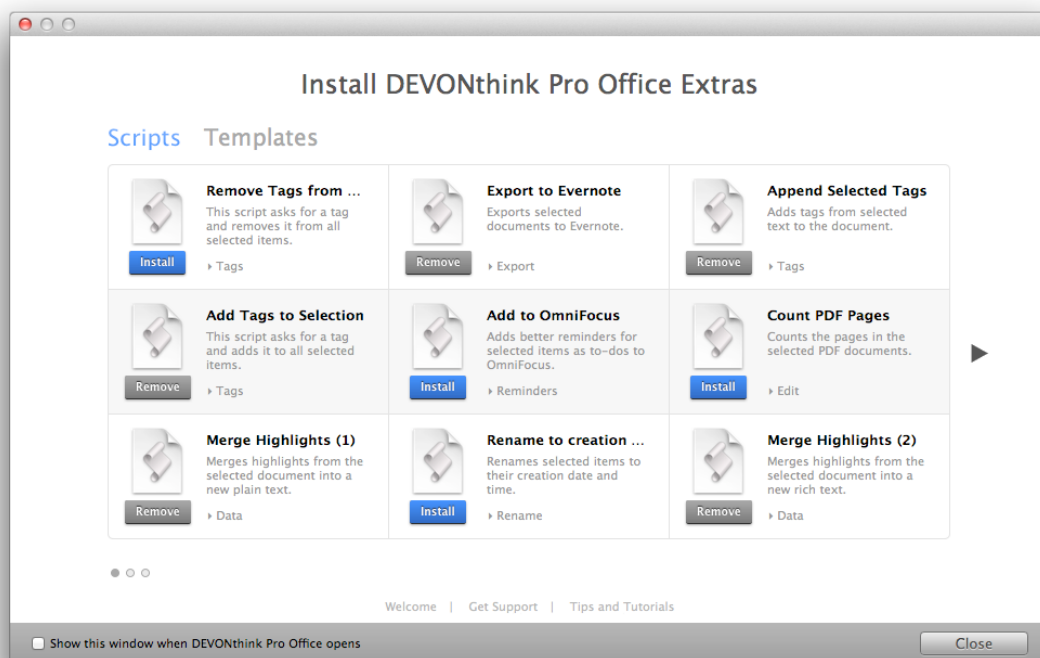
Here you can always find the latest tips and tutorials that help you squeeze the best out of DEVONthink Pro Office. Tutorials can be slideshows describing basic tasks in DEVONthink Pro Office or screencasts.

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 Pro Office 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 *Scripts* or *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 Pro Office there might be no extras of this type (yet) available for DEVONthink Pro Office.

DOCUMENTS

In this chapter:

General	68
Plain and rich texts	69
HTML pages, web pages, feeds	71
Sheets	73
Images and movies	74
PDFs	75
Office documents, email, and others	76

All documents are displayed in DEVONthink Pro Office 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 within DEVONthink Pro Office in views (not to confuse with the different layouts in main windows, also called [views](#)). Each view (for example, a text or PDF view), has its own tools, contextual menu commands, and hidden keyboard shortcuts. Some views, like the text view, also allow you to edit the document, while others like the PDF view, only display the selected document.

Currently, DEVONthink Pro Office features the following view types:

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

NAVIGATION BAR

At the top of the view/edit pane DEVONthink Pro Office 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.
- ▶ ➦ Shows the system-wide sharing menu. OS X 10.8 Mountain Lion or later only.
- ▶ 🔒 Locks or unlocks the item.
- ▶ ⏮ Scrolls to the previous highlight, e.g. a search term occurrence.
- ▶ ⏭ Scrolls to the next highlight, e.g. a search term occurrence.
- ▶ 📄 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 [Concordance drawer](#).
- ▶ 📄 Opens the [See also & Classify drawer](#).
- ▶ 📄 Shows a list of the most important words of the document.
- ▶ 📄 Switches 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 Pro Office 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. 135ff](#)

When you type the name of a tag, DEVONthink Pro Office 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, and matches also sub-strings. 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 Pro Office 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](#).

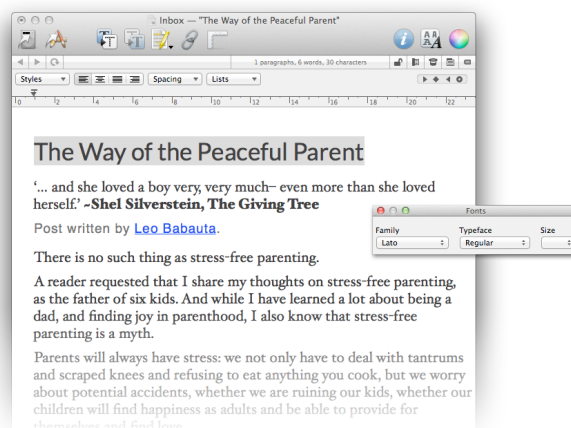
SHORTCUTS & MODIFIER KEYS

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 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 Pro Office 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).
- **Option-Click (2):** Add clicked URL to the [Download Manager](#).

TOOLBAR

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

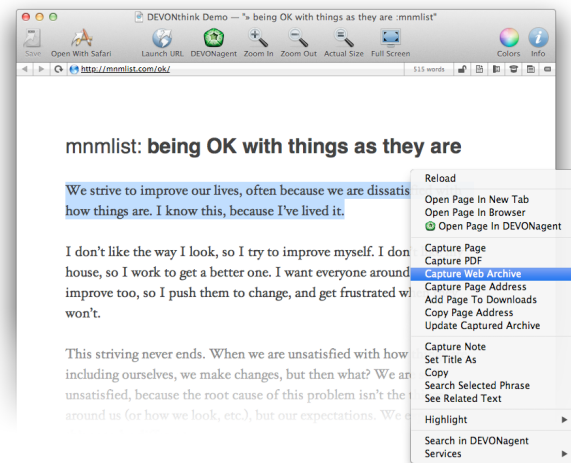
CONTEXTUAL MENU

- **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. DEVONthink Pro Office displays also RSS news feeds like regular web pages. Pages are rendered similar to Safari or any other WebKit-based browser such as [DEVONagent Pro](#).

News feeds item (RSS, RDF, Atom) are created in a database automatically for all items downloaded by a feed. Feed items are saved either as HTML or as a bookmark if the item has no content. An internal CSS stylesheet is used to style the output. You can change it in the [Preferences](#). The icon of an unread feed item in list and split views is shown with a blue dot instead of a regular icon.

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).
- ▶ **Option-Click:** Add clicked URL to the [Download Manager panel](#).
- ▶ **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 Pro Office offers only tools for HTML views that are useful in a web environment.

CONTEXTUAL MENU

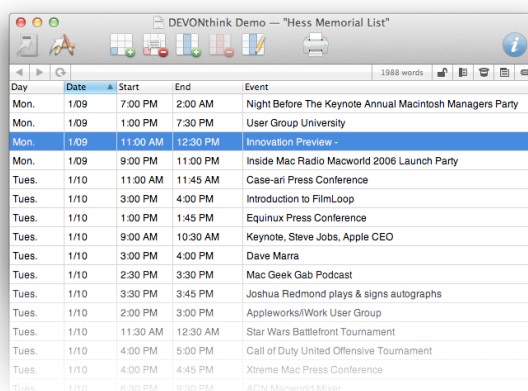
- ▶ **Reload:** Reloads the page from the Internet.
- ▶ **Open ... in New Tab:** Opens selected element in a new tab.
- ▶ **Open Link in Browser:** Opens a link in your default web browser.
- ▶ **Open Link in DEVONagent:** Opens a link in [DEVONagent Pro](#).
- ▶ **Open Link in PhotoStickies:** Opens 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.
- ▶ **Add Page to Downloads:** Adds the URL of the current page to the [Download Manager](#).
- ▶ **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.
- ▶ **Add Link to Downloads:** Adds a link to the [Download Manager panel](#).
- ▶ **Add Page to Downloads:** Adds the page address to the [Download Manager panel](#).
- ▶ **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.

SHEETS



Day	Date	Start	End	Event
Mon.	1/09	7:00 PM	2:00 AM	Night Before The Keynote Annual Macintosh Managers Party
Mon.	1/09	1:00 PM	7:30 PM	User Group University
Mon.	1/09	11:00 AM	12:30 PM	Innovation Preview -
Mon.	1/09	9:00 PM	11:00 PM	Inside Mac Radio Macworld 2006 Launch Party
Tues.	1/10	11:00 AM	11:45 AM	Case-ari Press Conference
Tues.	1/10	3:00 PM	4:00 PM	Introduction to FilmLoop
Tues.	1/10	1:00 PM	1:45 PM	Equinox Press Conference
Tues.	1/10	9:00 AM	10:30 AM	Keynote, Steve Jobs, Apple CEO
Tues.	1/10	3:00 PM	4:00 PM	Dave Marra
Tues.	1/10	2:30 PM	3:30 PM	Mac Geek Gab Podcast
Tues.	1/10	3:30 PM	3:45 PM	Joshua Redmond plays & signs autographs
Tues.	1/10	2:00 PM	3:00 PM	Appleworks/Work User Group
Tues.	1/10	11:30 AM	12:30 AM	Star Wars Battlefront Tournament
Tues.	1/10	4:00 PM	5:00 PM	Call of Duty United Offensive Tournament
Tues.	1/10	4:00 PM	4:45 PM	Xtreme Mac Press Conference
Tues.	1/10	6:30 PM	6:30 PM	ACN Macworld Mixer

Sheets contain text in a table and can be used to store any kind of tabular data from an address book to part numbers and descriptions.

Use sheets like any other document. Add new rows using *Data > Sheets > Add Record*, delete rows by selecting them and using *Edit > Delete*. Alternatively use the contextual menu. Click a cell to edit its content, press the *Escape* key to stop editing, and use the *Tab* or *Return* keys to navigate from cell to cell.

Sheets support the *Edit > Find >* commands but currently no formatings. You can, however, enter line breaks by typing `⌘↵`.

Note: Due to limitation in Mac OS X's Cocoa memory management, sheets are currently limited to 32,767 records.

TOOLBAR

Document windows opened for a sheet or record also feature a tool set specialized for working with sheets and records. Use tools like *New Record*, *New Column*, or *Columns* to create new records for the sheet, add a column, or modify the columns in any way you like.

SHORTCUTS & MODIFIER KEYS

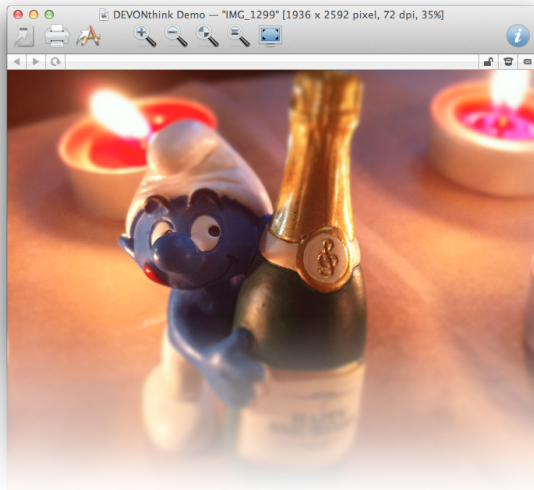
- ▶ **Return:** Moves one cell down for editing.
- ▶ **Shift-Return:** Moves one cell up for editing.
- ▶ **Tab:** Moves one cell to the right for editing.
- ▶ **Shift-Tab:** Moves one cell to the left for editing.
- ▶ **Arrow keys:** Moves the editing selection.
- ▶ **Escape:** Stops editing.

CONTEXTUAL MENU

The contextual menu for sheets basically lists the same commands that are also available through the main menu.

- ▶ **New Record:** Creates a new record in the sheet.
- ▶ **New Column:** Creates a new column in the sheet.
- ▶ **Edit Columns:** Opens the columns editor where you can create new columns, delete them, rearrange, and rename them.
- ▶ **Cut/Copy/Paste:** Cuts, copies, or pastes whole records in a sheet. Use them, for example, to duplicate records.
- ▶ **Delete Records/Columns:** Deletes the selected record(s) or column(s).

IMAGES AND MOVIES



DEVONthink Pro Office 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, *Page Down* and *Page Up*, 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 Pro Office provides a set of tools that allows you to zoom the picture to whatever zoom factor you like, or to view

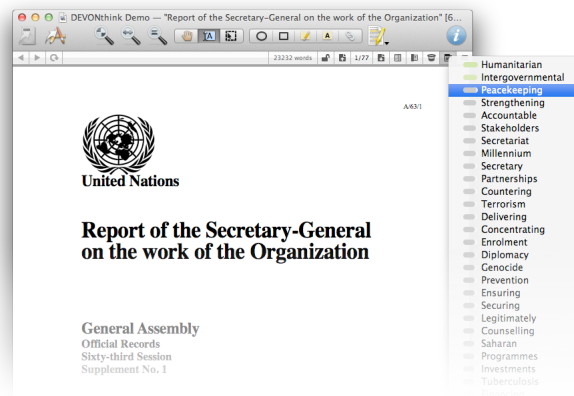
the image in full screen mode. Use *Open Externally* to open the image in an external editor. Movies appear with the standard QuickTime controller. Use OCR to convert an image to a searchable PDF.

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

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](#).

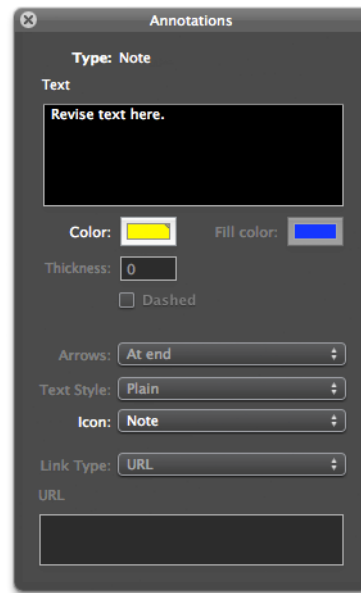
Note: Only real PDF documents are editable, converted (e.g. EPS, PostScript, or Adobe Illustrator files), Skim documents (PDF packages), and PDF previews generated by [QuickLook](#) are not editable.

ANNOTATING PDFS

You can use DEVONthink Pro Office 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

- **Annotate:** Provides annotation tools. [See also p. 75ff](#)
- **Tool:** Selects the editing mode. [See also p. 75ff](#)

- ▶ **Delete Pages:** Deletes the selected pages of a PDF document.
- ▶ **OCR:** Converts the document to a searchable PDF.

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 Pro Office 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.

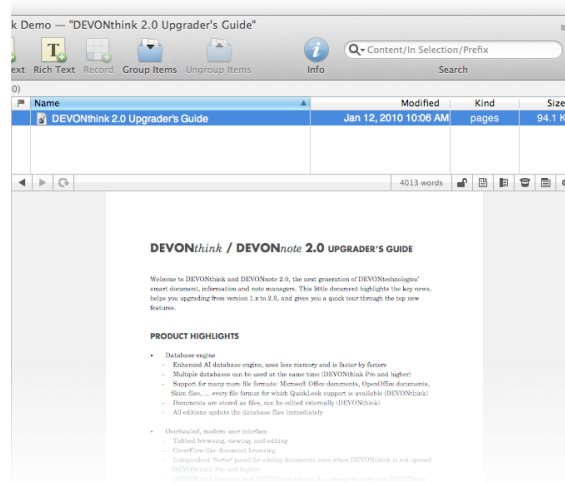
The PDF sidebar also offers commands for working with single pages:

- ▶ **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 Pro Office 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 Pro Office 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
- ▶ **Email messages**
- ▶ **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 Pro Office 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 Pro Office 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 Pro Office offers a number of toolbar items, e.g. for accessing the [Scripts menu](#), moving back and forth through the other documents contained in the same group or opening the document in its source application. Also you can switch to [full screen mode](#).

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

DRAWERS & SHEETS

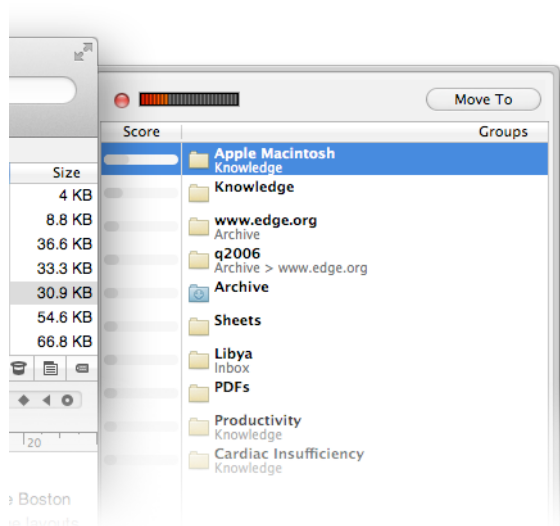
In this chapter:

See Also & Classify	78
Concordance	79
Smart Group Editor	79

DEVONthink Pro Office 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. Drawers also show concordance lists of all words in a document. 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 Pro Office 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 Pro Office 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 Pro Office 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 $\mathbb{X}$ 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 Pro Office 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 Pro Office 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.

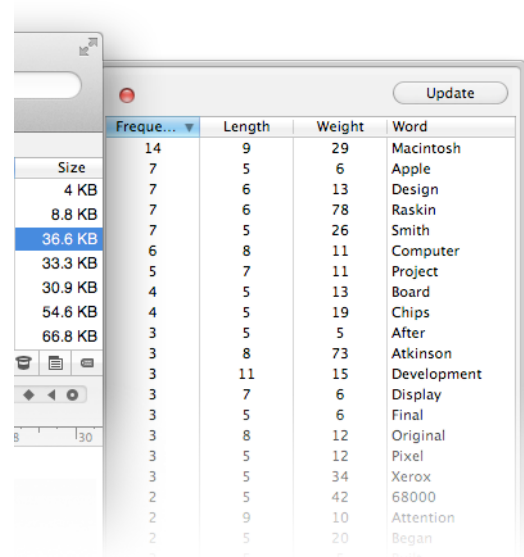
CONTEXTUAL MENU

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).
- ▶ **Send by Email:** Sends the selected item by email.

CONCORDANCE

The Concordance drawer appears when you click the *Concordance* button in the document's [navigation bar](#). It lists all words in that document similar to the [Concordance window](#). Select one or multiple words (with the ⌘ and ⌘ keys pressed) in the drawer to highlight their occurrences in the document.



You can sort the list in the drawer by clicking the title of the column you want to use for sorting. Click the column title again to reverse the sorting order. If you have changed the contents of the document, click the Update button to update the concordance list. Double-click any word in the drawer to open the [Search window](#) with this word already filled in.

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

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. 142ff](#)

Use the + and - buttons to add more predicates to your smart group or to delete them. Hold the $\sim$ 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 Pro Office 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.

The following smart groups are by default added to the [sidebar](#):

- ▶ **Today:** Shows all documents added or modified today.
- ▶ **Unread:** Shows all documents marked as unread.
- ▶ **Yesterday:** Shows all documents added yesterday.

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

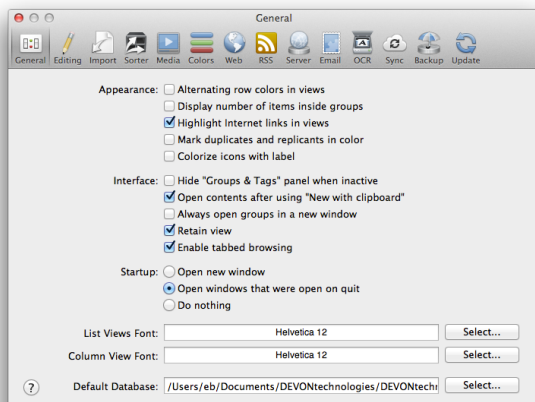
PREFERENCES

In this chapter:

General	81
Editing	82
Import	83
Sorter	84
Media	84
Colors	85
Web	85
RSS	86
Server	87
Email	88
OCR	89
Backup	90
Update	90

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 Pro Office. 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 Pro Office.
- ▶ **Open contents after using 'New with Clipboard':** Check to let DEVONthink Pro Office 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 Pro Office to open a fresh [main window](#) on startup, open all windows that were open when you quit DEVONthink Pro Office the last time, or do nothing. If *Open all windows that were open on quit* is selected, DEVONthink Pro Office also opens all databases that were open on quit.

Note: Even when you tell DEVONthink Pro Office to not open a window on startup, it will always open at least one window when you open a database. When DEVONthink Pro Office crashed or was quit by force no windows are restored to prevent the same crash happening again.

FONTS

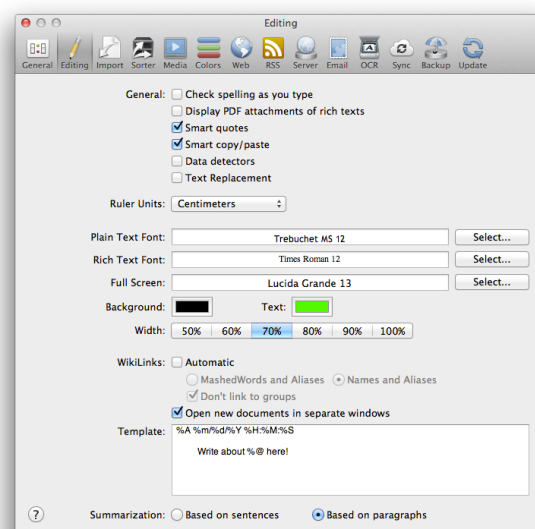
Use *List Views Font* and *Column View Font* to set the font DEVONthink Pro Office uses for displaying item lists in list and column views.

DEFAULT DATABASE

You can set a default database that is automatically opened when you start DEVONthink Pro Office. Use the *Select* button to select any DEVONthink Pro Office database or edit the path manually.

Alternatively, open your favorite database, choose [File > Database Properties](#) and check *Use as default database*.

EDITING



The Editing tab defines all options that fine-tune DEVONthink Pro Office'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 Pro Office 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.

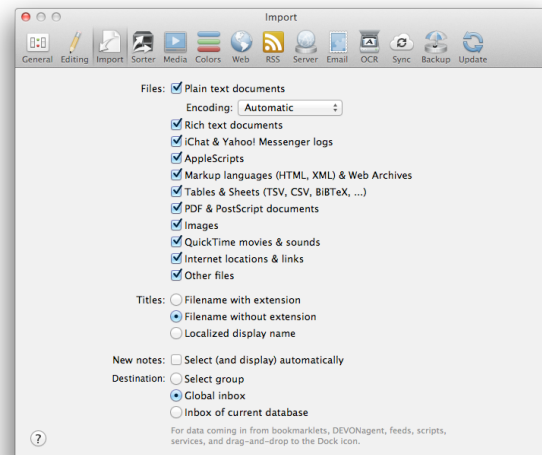
WIKILINKS

- **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 Pro Office to calculate summaries from sentences or from whole paragraphs.

IMPORT



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

FILES

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

TITLES

Select how you want DEVONthink Pro Office 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

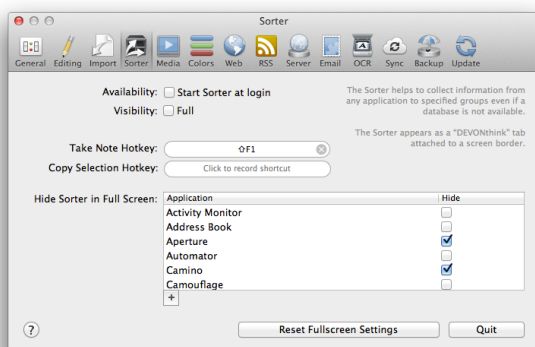
Check *Select (and display) automatically* to automatically select and display the last note you have taken.

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 Pro Office 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.
- **Inbox of current database:** The data is stored in the inbox of the current, frontmost database.

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. 92ff](#)

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.

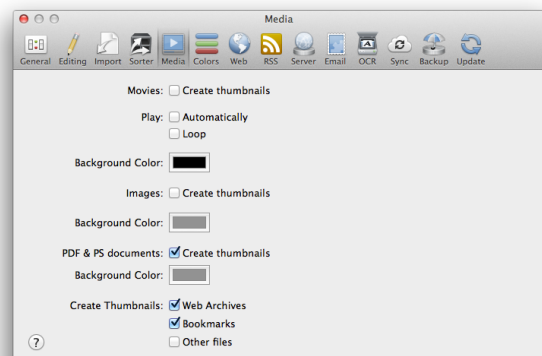
HIDER SORTER IN FULL SCREEN

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 Pro Office 'forget' all remembered apps.

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

MEDIA



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

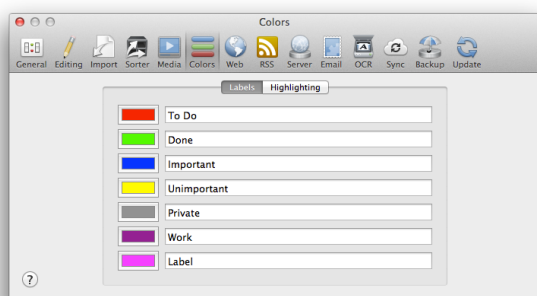
The following options are available:

- **Movies:** Check *Create thumbnails* if you want DEVONthink Pro Office 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.

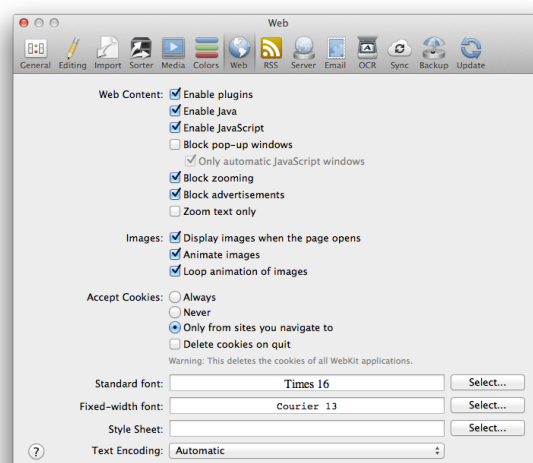
- **Images:** Check *Create thumbnails* if you want DEVONthink Pro Office to create thumbnails for imported or indexed images. Choose a background for viewing images using the standard Mac OS X color chooser.
- **PDF & PostScript documents:** Check *Create thumbnails* if you want DEVONthink Pro Office 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 Pro Office to try to create thumbnails for these file types.

COLORS



Here you can name and choose the seven label colors DEVONthink Pro Office 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 Pro Office's displays web documents and 'live' web pages.

WEB CONTENT

These settings define how DEVONthink Pro Office 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 Pro Office 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 Pro Office.

FONTS

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

STYLE SHEET

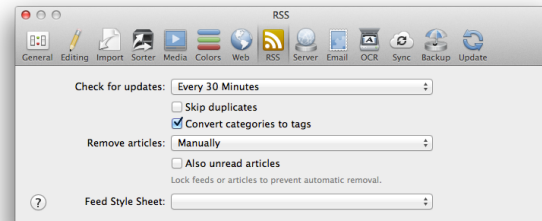
You can further control the way DEVONthink Pro Office displays web pages by applying a CSS style sheet that changes the rendering on-the-fly.

Click *Select* and choose your style sheet to apply it to DEVONthink Pro Office'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.

RSS



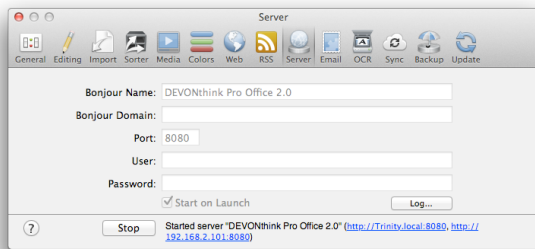
DEVONthink Pro Office comes with built-in RSS capabilities that enable you to add RSS feeds to your database and have DEVONthink Pro Office update them automatically.

RSS feeds are represented in DEVONthink Pro Office like smart groups that update themselves with content from the Internet. You create them with [Data > New > Feed](#) and use them like any other group.

Use the RSS preferences to define how often DEVONthink Pro Office checks for new articles, whether to skip duplicates when updating feeds, when to remove older articles, and which CSS style sheet to use for displaying the articles. Unread or locked articles are never automatically removed. Check *Also unread articles* to remove also unread articles when cleaning up and check *Convert categories to tags* to tag imported articles automatically if the feed contains categories.

DEVONthink Pro Office comes with multiple styles for displaying feed articles. You can use your own RSS stylesheets by placing them into "~/Library/Application Support/DEVONthink Pro 2/StyleSheets".

SERVER



DEVONthink Pro Office features a built-in web server that makes sharing your documents on your local area network as well as over the Internet a one-click action. It also comes with an Web-2.0-ish web application that lets you access your database from an [Apple iPhone](#).

As soon as the Web server is started, other users can use a standard Web browser to search your database, view documents, and download them.

Enter all necessary details (see below) and click the *Start* button to start the Web server to make all documents in every shared database (you switch on sharing in the [Database Properties](#) panel) available for searching. If you or others have problems accessing your DEVONthink Pro Office database with a Web browser, click the *Log* button to check the log for error messages and other information that could be helpful to solve the problem.

Note: When you switch to another database, the server will be automatically switched off for the safety of your data unless you have checked ['Launch on Startup.'](#)

DEVONthink Pro Office shows the name and two URLs for your database at the bottom of the window as soon as the server is started. Use either the Bonjour services list of the Safari Bookmarks view or enter the shown URLs into the address field of your Web browser to access your database. Use the numeric address if the Bonjour does not work for your network.

To learn more about using the web interface, the iPhone web application, as well as making your database available from the 'outside' Internet, please [read on here](#).

BONJOUR NAME

Enter a distinct name for your computer here that identifies it on your local network using Bonjour. This name will be shown, e.g., in the list of Bonjour services on other Macs on your network. Switch, e.g., to the Bookmarks view in Safari and select *Bonjour* in the sidebar.

BONJOUR DOMAIN, PORT

These settings define the Bonjour domain and the TCP/IP port number it uses.

- ▶ **Bonjour Domain:** Set the Bonjour domain if necessary. Leave this field empty unless you know what you're doing!
- ▶ **Port:** Adjust the port number to your needs. This is only necessary if you're sharing your database on the WAN/Internet or if you are using a firewall. In this case, enter a free port number here and open this very port also on your firewall for incoming access. If no port number is entered here and you are only using Bonjour, DEVONthink Pro Office will automatically assign a random port number and publish it on Bonjour, so there is no need for you to communicate the port number to other users on your network. This is the recommended operation. Only set a port when you want to access the web server programatically or want to connect it to an outside port.

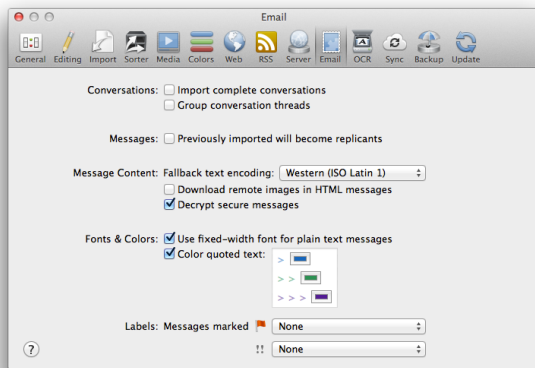
USER, PASSWORD

To protect your database with a user name and password, enter a user name and password here. Any user who wants to search your database using a web browser will need to enter these two details before they gain access to your documents.

START ON LAUNCH

To automatically start DEVONthink Pro Office's web server as soon as you launch DEVONthink Pro Office, check this checkbox.

EMAIL



Use these options to define how emails are imported and displayed inside DEVONthink Pro Office.

CONVERSATIONS

- **Import complete conversations:** DEVONthink Pro Office can import not only selected email messages but also other messages that are related to this conversation using the Sent Messages mailboxes. Check this box to let DEVONthink Pro Office scan your Sent Messages folder and import sent messages that belong to the same conversation.
- **Group conversation threads:** Check this option to combine all messages belonging to a conversation thread into a group. This makes identifying conversations easier and automatically adds structure to the imported messages.

Note: These features only work if the email program used maintains references to previous messages in the emails it sends.

MESSAGES

Check *Previously imported will become replicants* to import previously imported messages again. They will become replicants. When this option is unchecked, DEVONthink Pro Office skips previously imported messages.

MESSAGE CONTENT

- **Fallback text encoding:** When decoding an email message, DEVONthink Pro Office uses

the encoding of the message. When there is no encoding information in the message, DEVONthink Pro Office uses the encoding that you set in this pop-up menu as a fallback.

- **Download remote images in HTML messages:** Check to store the image references required by HTML messages in the database. Spammers and other unfriendly agencies may use these images to track if you have read the message. Therefore this is unchecked by default.
- **Encryption:** DEVONthink Pro Office can decrypt secure email messages and file them decrypted so that you can search them or apply AI-based functions such as [Classify](#) or [See Also](#) to them.

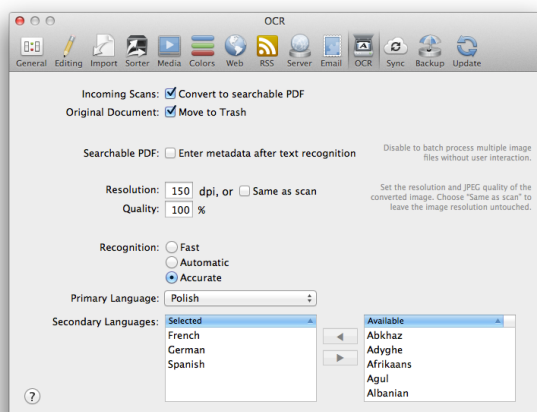
Note: The email message will be stored decrypted in the database package, so all its contents are available from within DEVONthink Pro Office and to other applications or Spotlight.

FONT, QUOTED TEXT, LABELS

- **Use fixed-width font for plain text messages:** Check to show plain text messages using a fixed-width font such as Courier. This is useful if the messages contain tables or footers formatted with spaces.
- **Color quoted text:** Check to mark text that is quoted from previous recipients in messages. Click the color buttons to change the color for first, second, and third level quotes.
- **Labels:** Finally, select which [labels](#) you want to assign to messages that were flagged or marked as 'high priority' in the mail application. As items can only have one label at a time, flagged messages are treated as more important than messages marked as 'high priority.'

Note: The first two options above only modify the display of email messages in the [text view](#). By default, messages are displayed using [QuickLook](#).

OCR



DEVONthink Pro Office contains an optical character recognition (OCR) module that allows you to import scanned documents and make them searchable. These documents are 'read' by the embedded OCR engine and stored as PDF files to the database that contain an additional (invisible) text layer with the recognized, computer-readable text. Use these options to fine-tune the OCR process.

You can [import scanned documents](#), or [scan them directly](#) from within DEVONthink Pro Office.

INCOMING SCANS

Check *Convert to searchable PDF* to apply OCR (optical character recognition) to PDFs that have been sent in from a known scan software, e.g. ExactScan (full edition), CanoScan ToolBox, and others. The resulting file is a standard PDF with the original image and a computer-readable text layer behind it.

ORIGINAL DOCUMENT

Check *Move to Trash* if you want DEVONthink Pro Office to move the original documents to the trash when they have been successfully imported using OCR. When documents are [converted by OCR](#) within the database, the original document is deleted from the database when this option is checked. When files are converted at import, the original document is moved to the Finder's trash when the option is checked. Use this option

to prevent your incoming folder for scanned documents or your database from growing cluttered after OCR has produced searchable PDFs.

SEARCHABLE PDF

Check *Enter metadata after text recognition* to make DEVONthink Pro Office show a metadata entry dialog whenever a PDF is imported using OCR. Use this dialog window to enter the proper document name, the author of the document, and some keywords describing the document. Also, adjust the timestamp of the PDF to the actual date of the paper document. The dialog window is shown when the OCR process for a document has been completed.

When checked, the metadata entry dialog will appear whenever you scan a document or import an image file with OCR. So, if you want to scan/import multiple files in a batch, consider switching this option off.

Note: The information you enter in this dialog will be available to Spotlight and can be changed in the Preview application. The *title* field will also be used to name the document, the *keywords* will go into the [Comments](#) field, and the *creation date* will be the creation date of the document in DEVONthink Pro Office. You can access this information in the [Document Properties](#) panel.

Additional options:

- **Resolution & Quality:** Use these two options to control the dpi resolution as well as the picture quality of the PDF created by the OCR. The larger the resolution and the larger the quality, the larger the resulting PDF document. Check *Same as scan* to keep the original image resolution of black-and-white scans.
- **Recognition:** Control the accuracy vs. the speed of the text recognition. *Accurate* gives you better text recognition but it takes a lot longer, *Fast* makes the OCR go fast but less accurate. *Automatic* is a good compromise.

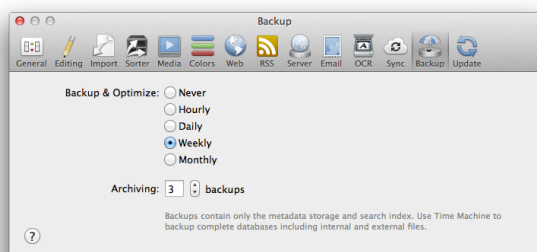
LANGUAGES FOR OCR

The Languages section of the OCR preferences lets you define the languages of the documents you scan in. DEVONthink Pro Office's OCR engines use this information to improve the accuracy of the text recognition. DEVONthink Pro Office comes with more than 150 dictionaries of various languages.

Select the languages you intend to scan or import with OCR. Select your primary language using the pop-up menu and add one or more secondary language. Select the languages you want to use on the list on the right right side ('Available') and move them to the left hand side ('Selected') using the right-to-left arrow button. To deactivate a selected secondary language, select it in the list on the left hand side and move it to the right hand side using the left-to-right arrow button. You can select a maximum of four secondary languages.

The primary language and the secondary languages are treated equally.

BACKUP



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

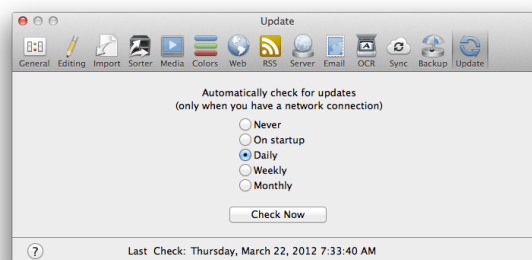
The backup automatically duplicates all important database files and moves the duplicates into a folder(s) named 'Backup(x)' within the DEVONthink Pro Office database folder/package. Select if you

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 gets corrupted. To back up your complete database use a third-party backup software or a backup solution such as Time Machine.

DEVONthink Pro Office also comes with a number of handy scripts that export your database as files and folders (and so independent from DEVONthink Pro Office). [See also p. 106ff](#)

UPDATE



Change the settings in this tab to define when you want DEVONthink Pro Office to check for new versions (never, on startup, daily, weekly, or monthly). DEVONthink Pro Office 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 Pro Office. The *Update* pane is not available if you have purchased DEVONthink Pro Office on the Mac App Store.

IN & OUT

In this chapter:

Bookmarklets	91
Dashboard widget	92
Sorter	92
Archiving email	94
Capturing paper	96
Capturing paper (ScanSnap and other scanners)	98
Sharing	99
Synchronizing (with DEVONthink To Go)	103

DEVONthink Pro Office is not an island. It integrates with the rest of your Mac and your iOS devices in a variety of ways to make it easy for you to add data to DEVONthink Pro Office or share your data with friends and colleagues.

BOOKMARKLETS

DEVONthink Pro Office 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 Pro Office 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

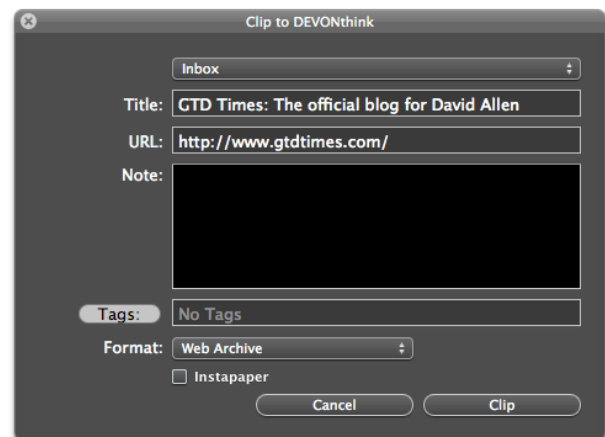
DEVONthink Pro Office supports a number of bookmarklets and browser extensions that you can find on our web site: [Click here to open the Download page.](#)

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.

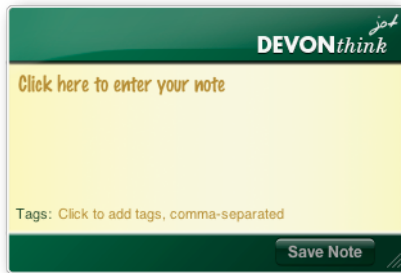


The *Clip to DEVONthink* bookmarklet or extension is the most comfortable choice as it calls a special panel in DEVONthink Pro Office that lets you enter a title as well as a note and tags and lets you choose in which format you want to save the clipped data. The note is either saved as a text file or,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

DASHBOARD WIDGET

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

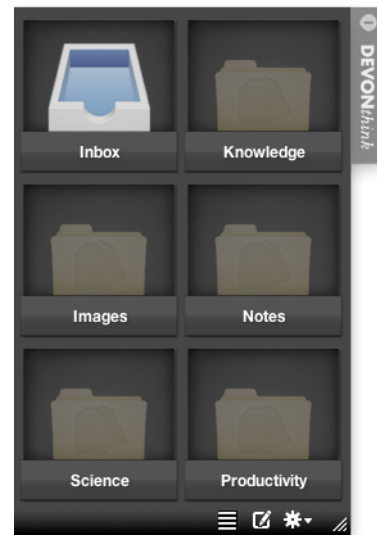
The front of the widget is where you can type your note's message. Click into the writing area to make the insertion caret appear. Enter your [tags](#) below the note taking area, if needed. Click the *Take Note* button to save the note to your database.



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 Pro Office 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 Pro Office 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 Pro Office 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 ⌘ held) to open a window for the connected group in DEVONthink Pro Office or to remove the connection. Double-click a box to open the connected box in DEVONthink Pro Office.

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 ⌘ pressed to move the item, drag with ⌘ and ⌥ pressed to add only a reference of the item to DEVONthink Pro Office (index). For URLs dragged from a browser this creates a bookmark; hold ⌘ 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 Pro Office 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 Pro Office 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 Pro Office 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 Pro Office'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 Pro Office 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.

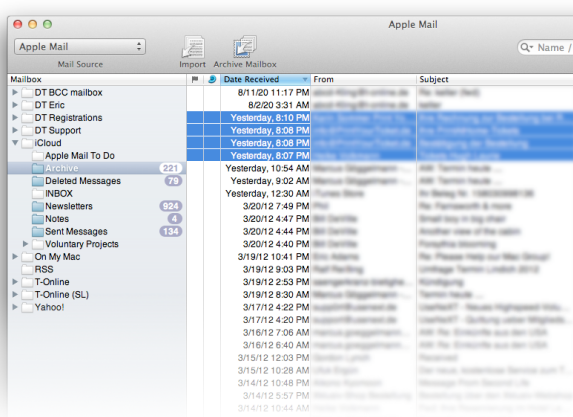
Edit 'Hide' settings: If you accidentally told the Sorter (not to) hide when an application goes to full-screen mode and now you want to change this behavior, do the following: First quit the Sorter, e.g. by using its *action menu*. Then, open the Terminal application (located in /Applications/Utilities)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

ARCHIVING EMAIL

The Mail import function lets you conveniently import email messages or archive even complete mailboxes from your preferred email applications to your DEVONthink Pro Office database.



DEVONthink Pro Office currently supports the following email applications:

- ▶ Apple Mail
- ▶ [Microsoft Entourage](#)
- ▶ [Microsoft Outlook 2011](#)
- ▶ [PowerMail 5.x and later](#)
- ▶ [BareBones Mailsmith](#)

- ▶ All email applications using standard Unix mailboxes, like [Thunderbird](#) or [GNUmail](#)

The imported email messages are saved in their original file format and are displayed using [QuickLook](#). [MailTags](#) metadata is preserved in the comments. In addition the 'read' and 'flagged' status of email messages are transferred from Microsoft Entourage and Microsoft Outlook independently from your settings in [Preferences, Email](#) tab.

Note: If you need to transfer email from an application like Outlook or Eudora to Apple Mail, take a look at [Hawk Wings](#). The site has hundreds of tips for Apple Mail, including a list of useful plugins and utilities.

Note: Importing messages from PowerMail only captures messages, no attachments. To archive messages including their attachments export your PowerMail mailboxes as Unix mailboxes and import them into DEVONthink Pro Office using the standard Unix mailbox approach.

PREPARATIONS

DEVONthink Pro Office communicates with your email application using either AppleScript or, if you are using Apple Mail, through a special plugin that implements a direct link between Mail and DEVONthink Pro Office. If the plugin is not automatically installed, [click here](#) or select [DEVONthink Pro Office > Install Add-Ons](#) to install it.

In addition to speeding up the transfer of emails from Apple Mail to DEVONthink Pro Office, the plugin inserts [new menu commands](#) into Mail's menus that allow you to directly archive selected messages or mailboxes to your DEVONthink Pro Office database. Note that when accessing a supported mail application via AppleScript, automatic fetching of new mail is disabled. This does not happen when you use Apple Mail with the DEVONthink Pro Office plugin installed.

Note: We highly recommended you install the Apple Mail plugin, as the AppleScript implementation in Apple Mail is slow. Also, it's

not possible to archive complete conversations from Apple Mail without the plugin installed, due to limitations in the AppleScript interface of Mail.

THE IMPORT EMAIL WINDOW

Open the Import Email window from [File > Import > Email](#) menu. It is designed to match the main window of most major email applications, with a mailbox list to the left and a list of messages contained in a selected mailbox to the right.

To access the mailboxes and messages stored in your email application, select your email application in the toolbar's Source pop-up menu. DEVONthink Pro Office automatically selects your default email application (DEVONthink Pro Office will only list applications installed on your Mac that it directly supports). If you are using an unsupported mail application that uses Unix mailboxes, like Thunderbird, choose *Unix mailbox* and locate the mailbox file you want to use.

You can also drop '.mbx' or '.mbox' files onto DEVONthink Pro Office's application icon to import them bypassing this window.

DEVONthink Pro Office then immediately launches your email application and shows the list of available mailboxes. Select any mailbox to show its content and use the triangles in front of the mailbox icon to expand the mailbox and see its sub-mailboxes.

To import a complete mailbox, including messages, select the mailbox in the folder list, and click the *Archive Mailbox* icon in the toolbar. This imports the complete mailbox including all sub-mailboxes and recreates the mailbox hierarchy by using groups in your DEVONthink Pro Office database. To import one or multiple messages, select them in the list of messages and click the *Import* icon in the toolbar. The imported messages are placed into the [default destination](#).

Note: While importing mail, your email application is put temporarily offline. It will be switched to online again as soon as the import is done.

Import vs. Archive Mailbox: If you want to archive whole mailboxes including all sub-mailboxes, use the *Archive Mailbox* icon in the Import Mail

window's toolbar. Select the mailbox that you want to archive and click the *Archive Mailbox* icon in the toolbar. DEVONthink Pro Office imports all new (!) messages of the selected mailbox in all of its sub-mailboxes to the *Email* group of the current database. This *Email* group is shared by all mailboxes archived.

Note: The option *Archive Mailbox* is not available for Unix mailbox files. If you are using IMAP, you may want to make sure that your email client is keeping a local cache of all messages and that your IMAP mailboxes are fully synchronized to the online server before you import your messages to DEVONthink Pro Office. This will make the import more reliable and faster.

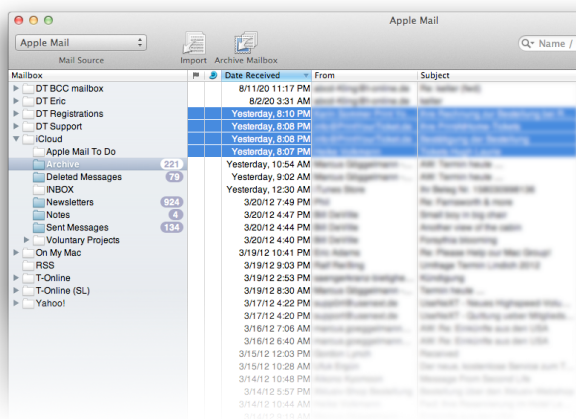
Filter: Change any filter settings on the right-hand side of the window to narrow down the list of messages. The following filters are available:

- ▶ Show only Read, Unread messages (by default it shows both)
- ▶ Show only Flagged messages
- ▶ Show messages marked as being high priority
- ▶ Show only messages in a given date range
- ▶ Hide messages already imported into DEVONthink Pro Office
- ▶ Hide deleted messages
- ▶ Hide messages marked as junk

IMPORTING FROM APPLE MAIL

If you are using Apple Mail, you're one step ahead of those using other mail applications, as the plugin that DEVONthink Pro Office installs for Apple Mail not only directly links DEVONthink Pro Office to the application, but also inserts two very convenient menu commands. These commands allow you to directly import selected messages, or even complete mailboxes, from Apple Mail to DEVONthink Pro Office.

Alternatively you can drag messages directly from Apple Mail to DEVONthink Pro Office.



To import complete mailboxes from Apple Mail to DEVONthink Pro Office, select one or more mailboxes in Apple Mail and choose *Mailbox > Add to DEVONthink Pro Office*. To import one or more selected messages, choose *Message > Add to DEVONthink Pro Office*. The imported messages are stored in the inbox.

Note: The *Mailbox > Add to DEVONthink Pro Office* command does import only the selected mailbox without travelling its sub-mailboxes. To import mailboxes from Apple Mail with travelling all sub-mailboxes as well as preserving the mailbox hierarchy use the [Mail Import window](#).

REPLYING TO IMPORTED MESSAGES

To reply to an archived email message, right-click it and choose [Reply](#). Choose [Send by Email](#) to email a selected document.

Note: Some email applications, e.g., Mozilla Thunderbird, do not support AppleScript and so DEVONthink Pro Office cannot properly create a new email with attachment. Instead, it tries to stuff as much information into a URL and send this to the application. But, a URL can only be of limited length, therefore the data has to be trimmed and you will see the message 'This is a summary of the selected record text!' instead of the quoted text in the newly created message.

TOOLBAR

The toolbar of the Import Mail window contains the following commands:

- **Import:** Imports the selected messages.

- **Archive Mailbox:** Archives all (new) messages of the selected mailbox (and its sub-mailboxes) to the *Email* group of the current database. Messages already archives are skipped.
- **Mail Source:** Lists all available email application and lets you choose the source from where you want to import.
- **Search:** Searches in the 'name', 'subject', and 'address' fields within the selected mailbox.

CAPTURING PAPER

DEVONthink Pro Office comes with built-in support for [Image Capture compliant scanners](#) as well as for the [Fujitsu ScanSnap](#).

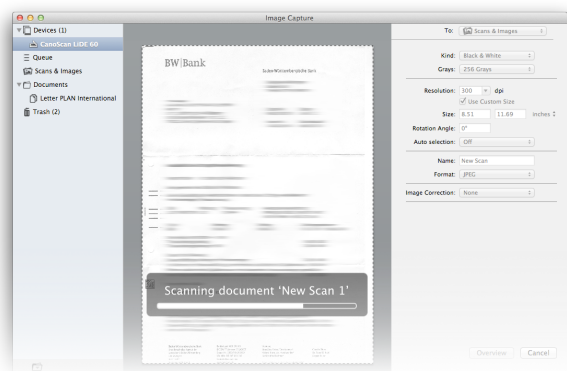
DEVONthink Pro Office automatically makes scanned documents searchable by using optical character recognition (OCR). OCR adds an invisible text layer to the scanned file that is computer-readable and searchable; a layer that is recognized by DEVONthink Pro Office's AI engine. For best results we recommend scanning at 150 dpi in color and with 100 percent quality.

Note: If you are using a Fujitsu ScanSnap [see next section](#).

To capture paper using an Image Capture compliant scanner open the *Image Capture* window using [File > Import > From Scanner or Camera](#). It is divided into a sidebar and a main pane which changes depending on your selection in the sidebar. The options in the sidebar are arranged from top to bottom according to a typical scan workflow: Scan, check the scanned pages, if necessary arrange them to a document, and save them to the database.

If you are using a scanner with an automatic document feeder (ADF) you can also use a [Queue](#) to prepare a pile of sheets for batch processing and scan them in one go.

DEVICES



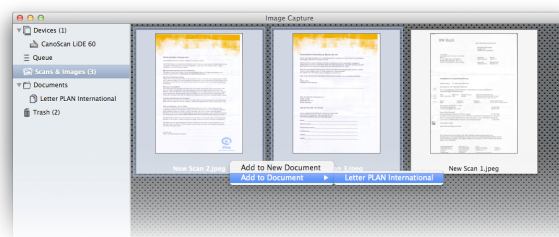
Select your connected scanner or camera in the *Devices* section of the sidebar to run a scan or download images. iPhones, iPads, and iPods are also treated like cameras. The main pane shows the standard capture interface that also Apple Image Capture uses. Captured or downloaded images appear in the *Scans & Images* section and are not immediately sent to your database. If you have already created an empty [document](#) for collecting multiple pages use the *To* pop-up menu to choose the desired destination.

Scanners: DEVONthink Pro Office generates an overview scan of the current page in the scanner, allows you to select which parts of the page you want to capture, and set the scan options. Click *Scan* to capture the page.

Cameras: DEVONthink Pro Office shows the available images. Select the images you want to import, rotate them if necessary, and click *Download* or *Download All* to download the images to your computer. You can also delete images from your camera with the *Delete* button.

Note: To conveniently scan multiple pages into a new document choose *PDF* or *TIFF* as file format check *Combine into single document*, and enter a document name as file name. DEVONthink Pro Office automatically creates a new empty [document](#) with this name and appends each scanned page until you either send the document to your database or enter a new name. When *Combine into single document* is checked DEVONthink Pro Office disables the *To* menu.

SCANS & IMAGES

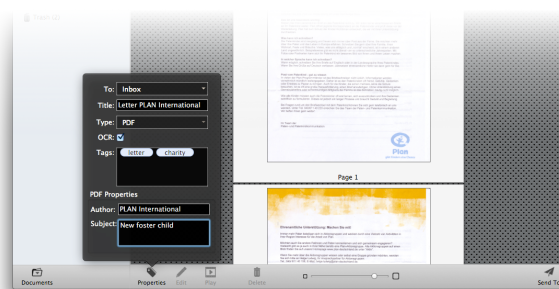


This is where your scans or images downloaded from your camera appear. Select your images to set their properties, edit (crop, rotate) them, play downloaded movies, or delete them.

If you do not need to collect multiple pages into a single document, all you need to do is set the scan's properties and send it to your database. In the properties choose a destination group (the global inbox is set by default) and enter title and tags. You can also choose if you want to save this scan as image or PDF document. Check OCR to convert this scan to a searchable PDF after importing. For PDFs you can also set the author and subject PDF properties. Then click the *Send To* button to directly import this scan.

If you are using a single-sheet flatbed scanner and want to collect multiple pages into one document, first create a new document using the *Documents* button at the bottom of the sidebar, then drag the pages to the new document in the [Documents](#) section to manually build the document.

DOCUMENTS



Create empty documents here to which you add your scanned pages. Right-click or click with ^ Control held to use the contextual menu for adding or deleting documents. Alternatively use the *Documents* button at the bottom of the sidebar.

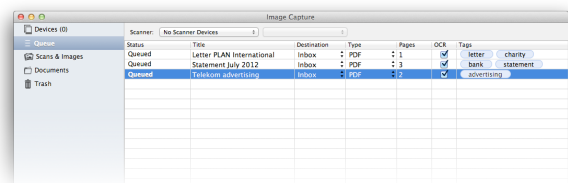
Add pages by dragging them from the [Scans & Images](#) to the document in the sidebar. Rearrange added pages to your needs and set its properties by clicking the *Properties* button. This is similar to single scans in the [Scans & Images](#) section.

Note: You cannot save multi-page documents as images therefore PDF is the only option for the file type here.

TRASH

This is where you find images that you have deleted from [Scans & Images](#) or [Documents](#). Empty the trash using the *Empty* button at the bottom of the window or right-click or [⌘]Control-click images to add them to an existing or new document using the contextual menu.

QUEUE



If you are using a document scanner with automatic document feeder you can use the queue to add multiple pages or even multi-page documents to the feeder and scan them in one go.

Choose your scanner in the pop-up menu above the list. Then use the *Add* and *Delete* buttons to add or delete steps and the *Up* and *Down* buttons to rearrange them. Edit the fields for any step to e.g. set a title or the tags, or change the document type or the destination. Check *OCR* to convert a scan to a searchable PDF after importing.

Before starting the batch run adjust your scan settings by clicking the *Configure* button. If you want to convert the scans to searchable PDFs you should choose a resolution of minimum 300 dpi. Then click the *Start* button to start scanning. Finished steps are marked as "Sent". Click *Clear Sent* to remove them from the list.

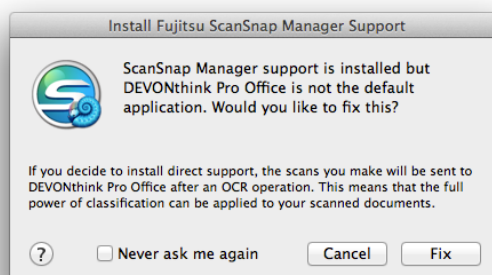
CAPTURING PAPER (SCANSNAP AND OTHER SCANNERS)

DEVONthink Pro Office also works with the [Fujitsu ScanSnap](#), [ExactCode ExactScan](#), and other scanners that are not directly supported. In addition you can add already scanned pages to your DEVONthink Pro Office database and [manually convert them](#) to searchable PDFs.

USING A SCANSNAP OR EXACTSCAN

DEVONthink Pro Office's integration with the [Fujitsu ScanSnap](#) as well as [ExactCode ExactScan](#) scan software is nearly seamless.

Whenever you start DEVONthink Pro Office, the application checks to see if the ScanSnap Manager or ExactScan software is installed on your Mac. If it is, DEVONthink Pro Office also checks if DEVONthink Pro Office is the default application for scanned documents. If this isn't the case, DEVONthink Pro Office asks if it should fix the ScanSnap Manager's or ExactScan's preferences so that all scanned files are sent to DEVONthink Pro Office when the scan is done. DEVONthink Pro Office recognizes where the incoming scans come from and runs OCR on them if necessary.



If you don't want to use DEVONthink Pro Office as the default target for your scans, you can check *Never ask me again* in the dialog window, and DEVONthink Pro Office will never ask you again if you want to use DEVONthink Pro Office with your scan software.

Reactivating scan software support: If you change your mind and want to re-activate the ScanSnap or ExactScan support, start the Terminal application

and execute the appropriate of the following commands (on one line; best use copy/paste as the command is case-sensitive):

```
defaults remove com.devon-technologies.thinkpro2  
"ScanSnapSupport.NeverCheckForPresence"
```

```
defaults remove com.devon-technologies.thinkpro2  
"ExactScanSupport.NeverCheckForPresence"
```

You can, of course, also set DEVONthink Pro Office as the default application for scanned documents in the ScanSnap Manager or ExactScan at any time without that special help from DEVONthink Pro Office.

Switching off the Quick Menu option: If activating ScanSnap support does not work, it may be that the so called *Quick Menu* is still activated in ScanSnap Manager. DEVONthink Pro Office sometimes cannot switch off this option automatically, so you need to do it manually. Check if *Use Quick Menu* is checked in *ScanSnap Manager's Dock menu*. If it is checked, uncheck it.

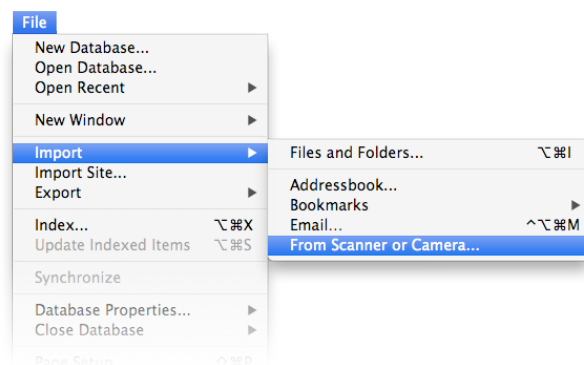
USING AN UNSUPPORTED SCANNER

You can also capture paper using an unsupported scanner and import the finished scans into DEVONthink Pro Office. To do this use the scan application that came with your scanner or a third-party scan application. Check the scan application's preferences and look out for an option that allows you to open the finished scan with another application, e.g. an image editor. Change the default application for the scan to DEVONthink Pro Office.

DEVONthink Pro Office knows the identifiers of many scan applications and will convert the incoming scan to a searchable PDF if possible. If DEVONthink Pro Office should not recognize your scan application please create a Zip archive of the application and [send it to us](#) so that we can add its identifier to a future release of DEVONthink Pro Office.

IMPORTING EXISTING FILES WITH OCR

If you already have an archive of documents that have been scanned without OCR, or if you cannot use the Capture function for whatever reason, you can import image files while applying OCR at the same time.



To import an image file while applying OCR, choose **File > Import > Image with OCR**. The image will be fed through DEVONthink Pro Office's OCR engine and be imported to the database as a PDF document. If you have checked *Set PDF attributes* in the [OCR preferences](#), DEVONthink Pro Office will show the metadata entry window when the OCR process is completed (before the file is actually imported to the database). In the file selector, check *Move to Trash* if you want to move the file to the trash when it has been successfully imported with OCR.

The date of the created document is set to the date of the original file. Thus for archival purposes the searchable document is identical to the original one. The modification date is set to the current date and time to reflect the addition of the searchable text layer. The keywords of the original PDF are retained and also used as tags.

SHARING

DEVONthink Pro Office allows you to give others on the local network access to your database using a standard web browser on any operating system (including Windows and Linux). The embedded web server provides an interactive web interface that allows you to browse and search all open and shared databases, preview documents, and add notes to the inbox. Alternatively it offers a simple search-engine-like search for those users who don't need all the functionality of the full web interface.

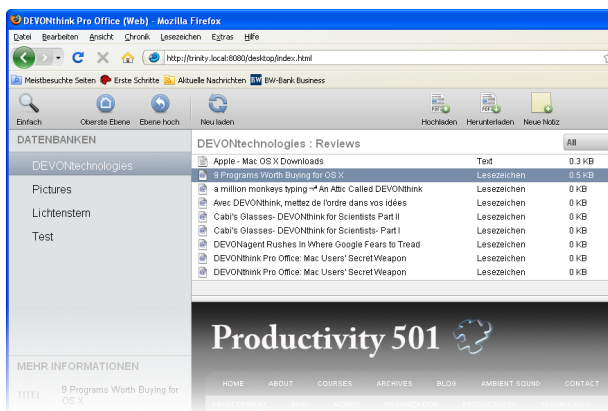
SHARING A DATABASE

By default, DEVONthink Pro Office does not share any database. To share a database, open it, then show its properties, [File > Database Properties](#), and check *Shared Database*. Uncheck this property to keep this database from being shared.

To find out the address of your shared database, open [Preferences > Server](#). You can start and stop the web server here and also find your web server's address. When the web server is running you can also find DEVONthink Pro Office in the Bonjour menu of your web browser.

USING THE INTERACTIVE WEB INTERFACE

The interactive web interface imitates the look-and-feel of a standard Mac application in many ways. Contrary to a static web site it only loads once, clicking buttons or links does not reload the whole page but dynamically updates it. When the web interface is loaded, don't use the *Back* and *Forward* button of your web browser for navigation but use the buttons the DEVONthink Pro Office provides.



The web interface is divided into four areas which can be individually resized:

- ▶ Toolbar
- ▶ Sidebar
- ▶ Items pane
- ▶ Preview pane

When loaded, the sidebar shows a list of all shared databases as well as more information about a selected item. Select a database to show its contents in the items pane and select an item to view it. Double-click groups to open them and use the *Home* and *One Level Up* toolbar buttons to go

back to the database's home level or to go to the parent folder (if you are not already on the home level). If a group contains more than 50 items, DEVONthink Pro Office displays them on multiple 'pages' and lets you navigate back and forth the pages with the back and forward arrow buttons below the item list.

In addition, the toolbar contains a number of other useful buttons:

- ▶ **Simple:** Switches to the [search-only web interface](#).
- ▶ **Refresh:** Refreshes the database list.
- ▶ **Upload Document:** Uploads a document from your computer to the database. The document will be placed into the currently shown group.
- ▶ **Download Document:** Downloads the selected document to the local computer.
- ▶ **New Note:** Creates a new plain text document in the database. The document will be placed into the currently shown group
- ▶ **See Also:** Searches documents similar to the selected one. See also the [See Also drawer](#).

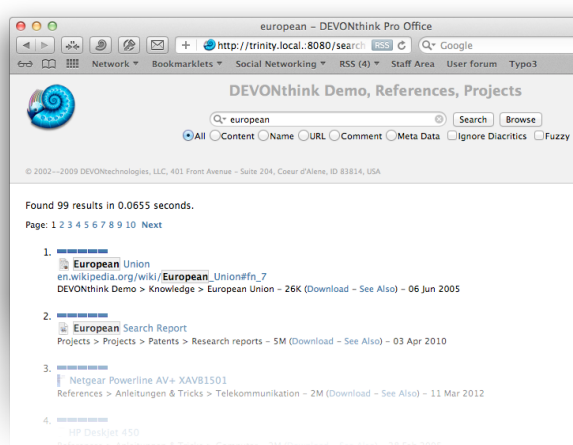
Below the toolbar you also find the search field that searches all shared databases. You can use all operators etc. that you can also use from within DEVONthink Pro Office. See also the [Search window](#).

After using the *search field* or the *See Also* button, the contents of the items pane is replaced with the search results sorted by relevance. Click the pane's *close gadget* to return to the last visited group.

USING THE SEARCH-ONLY WEB INTERFACE

To switch to DEVONthink Pro Office's search-only web interface click the *Simple* button in the interactive interface; to go back, use the *Browse* button next to the *Search* button.

Note: Alternatively you can directly open the search-only web interface by adding `"/search"` to the URL.



DEVONthink Pro Office's web interface works just like any other search engine you have used. Enter your search words, select your search options, and click *Search*. The search options resemble those also found in the [Search window](#). You'll receive a ranked list of search results with options to view or download the found documents.

USING THE IPHONE INTERFACE

Accessing your database from an iPhone is similar to connecting to the web interface. However, DEVONthink Pro Office gives you a JavaScript web application ready-made for the iPhone's screen size. It loads faster, transfers less data over the network, and is also optimized for iPhone-like usage like tapping.



To access your database from the iPhone, simply enter your database's address ([check in Preferences > Server](#)), with JavaScript switched on, in Safari for Mobile's preferences. You're automatically sent to the iPhone-optimized web app. If, by whatever chance, it does not work, e.g. because you have deactivated JavaScript, add '/iphone' (slash-iphone) to your database's address.

The iPhone web application simulates the look-and-feel of a native iPhone application but through Safari. Tap items and use the *Back* button to navigate your shared databases, add new notes to the global inbox, and search all databases just like you would do on the Mac.

Note: Due to limitations of the iPhone's hardware and operating system, the web application does not attempt to load files larger than 2 megabytes and does not display certain file types such as iWork files. Files that cannot be displayed of some reason appear greyed out. Also, some files are opened in a second tab which does not work when you have added the web application to your home screen (apps opened from the home screen cannot open a second tab).

ACCESSING YOUR DATA OVER THE INTERNET

To access your database from the Internet, you need to make your Mac 'visible' to the outside world. In general, when you are using a DSL or cable modem,

you are also using a router. Routers create an intranet that your Mac is connected to and 'route' traffic between the Internet and your personal intranet. Now, you need to create a route from the outside leading to the Mac sharing your database, offering a port on the outside that is directly connected to the port on which DEVONthink Pro Office is publishing.

If everything went well you will be able to access your database using an address like: `http://xxx.xxx.xxx.xxx:port`, where `xxx.xxx.xxx.xxx` is your current IP address, not of your Mac but of your router, and `port` the outside port number leading to your published database.

Using Lighthouse: An easy way to configure port forwarding is to use the shareware utility [Lighthouse](#). With a little luck, Lighthouse automatically finds your router and configures port forwarding for whatever ports you want. It installs as a menu extra and allows you to configure multiple settings for different applications. To set up Lighthouse for DEVONthink Pro Office, follow the instructions that come with Lighthouse. To download Lighthouse and to learn more about how it works and how to set it up for your network, please refer to [Lighthouse's homepage](#).

Port forwarding done manually: The following is only a rough outline of the steps needed to configure port forwarding manually. The precise way to do it varies from router to router. You will need to consult the manual for your router in order to determine exactly how to set things up. To configure port forwarding, follow these steps:

- ▶ **Step 1:** Begin by determining your Mac's public IP address. This can be done by visiting a web site like `http://www.whatismyip.com/` from your machine.
- ▶ **Step 2:** Determine the port on which DEVONthink Pro Office published on your Mac. You set the port in DEVONthink Pro Office's [Preferences, Server tab](#). To publish on the Internet, enter a port number here and do not let DEVONthink Pro Office set it automatically as it may change then every time you open the application.
- ▶ **Step 3:** Determine your Mac's private IP address. The IP address is usually of the form `10.x.y.z`,

`192.168.y.z` or `172.16.y.z`. You can find your Mac's private IP address by going to the Network preferences panel in System Preferences and looking it up under TCP/IP for the interface you are using (Built-In Ethernet or Airport).

- ▶ **Step 4:** Decide on a public port for DEVONthink Pro Office. The port should be in the range 1025-65500. We suggest that you use port 8080, which is traditionally a default port for private web servers.
- ▶ **Step 5:** Configure port forwarding on your router. The steps to do this vary from router to router, but all of them require you to provide these details: Public port, private destination IP and private destination port. You found the private destination port in step 2, and the private destination IP in step 3, and you selected the public port in step 4. If you are in doubt about how you configure your router to do port forwarding, you need to consult the manual that came with your router. It is usually done through a web-based interface or custom-built administration application. For instance, Airport routers can be configured using the Airport Admin Utility.
- ▶ **Step 6:** Save the configuration changes on your router, and restart it if required. At this point, you are ready to connect to your DEVONthink Pro Office from the outside.
- ▶ **Step 7:** From the remote computer, open a web browser and enter the address as follows: `http://xxx.xxx.xxx.xxx:port`, where `xxx.xxx.xxx.xxx` is the public IP address you found in step 1, and the public port you selected in step 4. Press Return and you should get presented with your database's web interface.

Setting up port forwarding can be tricky, but the difficult part is mainly in determining how to configure your particular router. If you are in doubt, try googling your router's name and combine it with a search for 'port forwarding' or 'port mapping.'

SYNCHRONIZING (WITH DEVONTHINK TO GO)

DEVONthink Pro Office has the ability to synchronize its databases 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 Pro Office 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 all databases 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. In the global inbox there is no *Sync* group; it is always synchronized as a whole.

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

In this chapter:

Introduction	104
Installation	105
Internal Scripts	105
Browsers, email, RSS readers	108
Triggered scripts	110
Droplets, Finder plugins, mail rules, PDF Services	110
More Examples	111
Automator	112

DEVONthink Pro Office comes with a fully loaded AppleScript dictionary that allows you to automate almost every aspect of the application. Use the included (and useful) add-on scripts and Automator actions to perform seldom-used functions. Or, use the included scripts and actions as templates for your own scripts and workflows.

INTRODUCTION

DEVONthink Pro Office features one of the largest AppleScript dictionaries of all Mac OS X applications available. These scripts make it possible to automate nearly every aspect of the application, and to integrate the application with almost every other application supporting AppleScript.

EXAMPLE SCRIPTS

To make it easier for you to start with scripting right away, we deliver a slew of scripts with DEVONthink Pro Office that you can access in the [Scripts](#) menu (which shows a stylized S symbol as its title instead of the word Scripts). These scripts interact directly with a selected group or document, or create documents themselves. In addition, the [smart template](#) are based on AppleScript scripts. All scripts delivered with DEVONthink Pro Office are also useable in everyday work, and are not simple examples skeletons that need to be tinkered with first.

Other ways to use AppleScript for extending and integrating DEVONthink Pro Office are triggered scripts, folder actions, droplets, and PDF Services scripts. You will find descriptions of the scripts that come with DEVONthink Pro Office in the corresponding sections of this chapter.

INTEGRATING OTHER APPLICATIONS

In addition to the scripts that you use inside DEVONthink Pro Office, Mac OS X features a global script menu that allows you to access certain scripts from any application on your Mac, for example your web browser or Apple Mail. When activated, it appears at the right side of the menu bar (like other menu extras such as the *AirPort signal strength* or the *Spotlight* icon). It appears with a black stylized S icon.

Note: By using folders named after applications inside the '~/Library/Scripts/Applications' directory, it is also possible to make scripts application-specific. Such scripts will appear at the top level of the global script menu when the application they belong to is frontmost. This removes clutter and shows only scripts that make sense in the current application.

DEVONthink Pro Office already comes with a number of scripts that you can access conveniently from the global script menu. DEVONthink Pro Office asks to install them whenever you update the application, or you can (re-)install them manually by selecting [DEVONthink Pro Office > Install Add-ons](#). They will be installed in '~/Library/Scripts/Applications/<TargetApp>' and only apply for the user currently logged in. Also, they only show up in the script menu when the application for which they are designed is the front-most application (the one that currently populates the menu bar).

To activate the global script menu, do the following:

- ▶ Open the AppleScript Utility (located in '/Applications/AppleScript').
- ▶ Check *Show Script Menu in menu bar*.

- ▶ Uncheck *Show Library scripts* if you only want to see the scripts you have installed yourself.

To install your own scripts (such as the scripts that come with DEVONthink Pro Office), copy them into the folder '~/Library/Scripts'. You can use sub-folders to structure them in any way you like.

DEVONTHINK PRO OFFICE'S DICTIONARY

DEVONthink Pro Office includes a large dictionary with commands, objects, and methods you can use for writing scripts that interact or extend DEVONthink Pro Office. To view the dictionary, open the Script Editor application (by default located in '/Applications/AppleScript'), select *File > Open Dictionary* and choose DEVONthink Pro Office in the appearing window.

You can also add DEVONthink Pro Office to your Script Editor library. Select *Window > Library*, click the + button and choose DEVONthink Pro Office. This way you keep DEVONthink Pro Office's dictionary at hand.

CACHING

DEVONthink Pro Office caches pre-compiles and caches scripts as soon as they're called for the very first time. So, when you are modifying a script you need to make sure DEVONthink Pro Office takes notice of the changes. For scripts in the [Scripts menu](#), use the *Scripts > Update Scripts Menu* command.

LEARNING APPLESCRIPT

This documentation is not an AppleScript language guide. Please refer to [Apple's AppleScript web site](#), other online resources, or introduction and reference books for more information on the AppleScript language. Here are some links for you:

- ▶ [The Ultimate Beginner's Guide to AppleScript](#)
- ▶ [AppleScript, the Language of Automation](#)
- ▶ [MacScripter](#)
- ▶ [ScriptWeb](#)
- ▶ [TECsoft Hands-On Trainings](#)
- ▶ [Scripting Matters Trainings](#)
- ▶ [AppleScript for Absolute Starters \(free PDF book\)](#)

- ▶ [AppleScript: The Missing Manual](#)
- ▶ [AppleScript: The Definitive Guide](#)

INSTALLATION

All add-on scripts that come with DEVONthink Pro Office are automatically installed or updated when you open a new version of DEVONthink Pro Office for the first time. You can, however, manually (re-)install them by choosing [DEVONthink Pro Office > Install Add-ons](#)

The scripts are installed in a number of locations:

- ▶ **Application Scripts:** These scripts are installed in '~/Library/Scripts/Applications/' and can be used from the global script menu. [See also p. 108ff](#)
- ▶ **DEVONthink Pro Office Scripts:** These scripts are installed in '~/Library/Application Support/DEVONthink Pro/Scripts/' and can be used from DEVONthink Pro Office's own script menu. [See also p. 105ff](#)
- ▶ **PDF Services Scripts:** These scripts are installed in '~/Library/PDF Services/' They extend the PDF button in any application's print dialog. [See also p. 111ff](#)

INTERNAL SCRIPTS

The internal scripts menu of DEVONthink Pro Office, located to the left of the *Help* menu (in DEVONthink Pro Office's menu bar), gives you access to a large number of pre-made scripts and [Automator workflows](#) that extend DEVONthink Pro Office with additional, more specialized commands and functions.

More scripts are available as extras. [See also p. 67ff](#)

Of course, you can easily modify all these scripts using the AppleScript Editor (and the workflows using Automator) or add your own scripts and workflows to the menu. They are located in '~/Library/Application Support/DEVONthink Pro/Scripts'. Open this folder in the Finder with *Scripts > Open Scripts Folder*.

Note: If you have modified the contents of the script menu and you want to go back to the default set, delete the complete Scripts folder

in '~/Library/Application Support/DEVONthink Pro/'. DEVONthink Pro Office will recreate this folder, including its content the next time you next launch the application.

Note: If you want to add keyboard shortcuts to scripts in this menu, you either use the System Preferences or you simply add the shortcut description to the file name of the script in '~/Library/Application Support/DEVONthink Pro/Scripts' or '~/Library/Scripts'. Example: 'eMail Current URL (Mail)___Cmd-Alt-M.scpt'. The naming convention is three underline characters followed by the shortcut description. 'Cmd' stands for the *Command*, 'Alt' for the *Option*, 'Ctrl' for the *Control*, and 'Shift' for the *Shift* keys.

COMMENTS

- **Assemble:** Collects the comments of the selected documents and creates a new document listing them.
- **Speak:** Speaks the comments of the selected documents.

DATA

- **Convert to Tags:** Converts the tag contained in the comments fields to real tags if the comments field of the selected document contains tags separated by commas. [See also p. 135ff](#)
- **Move Duplicates to Trash:** Moves all duplicates of the selected document to the trash.
- **Find & Remove Similar Contents:** Finds and removes similar documents.
- **Group With Duplicates:** Creates a group with duplicates of the selected documents.
- **Group With Replicants:** Creates a group with replicants of the selected documents.

DATES

- **Creation > Modification Date:** Sets the modification date of the selected items to their creation dates.
- **Modification > Creation Date:** Sets the creation date of the selected items to their modification dates.

- **Touch Creation Date:** Sets the creation date and time of the selected items to the current date and time.

DOWNLOAD

- **Images of Page:** Adds the images of a displayed web page to the database.
- **Linked Images of Page:** Adds linked images of a displayed web page to the database.
- **Links of Page:** Adds links contained on a displayed web page to the database.
- **Create Offline Archive:** Creates an offline version of a displayed web page.

EDIT

- **Count Characters:** Counts the characters in the current selection.
- **Count Words:** Counts the words in the current selection.

EXECUTE

- **AppleScript:** Executes an AppleScript script.
- **Perl:** Executes a Perl script.
- **Shell:** Executes a shell script.

EXPORT

The following scripts provide some seldom-used export functions and help you create backups of your database (for copying them to external media such as CD-R or JungleDisk).

- **Listing:** Saves a UTF-8 text file containing a text listing of the names of all contents/groups of the current database.
- **Daily Backup Archive:** Creates a backup of the database in '~/Backup'. All backups are named after the current date so that multiple backups are kept.
- **To JungleDisk:** Exports all items in the database as a Zip archive and copies the backup archive to your [JungleDisk](#). Please note that for this script to work, your JungleDisk needs to be named 'JungleDisk'.

FEEDS

DEVONthink Pro Office can be used as a news feed reader. To work with news feeds, use the dedicated [feed document](#) type.

The following scripts demonstrate additionally methods how DEVONthink Pro Office can directly plug into live information sources by the use of AppleScript.

- ▶ **Apple -- Hot News:** Creates an HTML document with Apple's Hot News.
- ▶ **Nature -- Hubble News:** Downloads the latest Hubble news.
- ▶ **iTMS -- Added Albums:** Downloads covers of albums recently added to the iTunes Music Store.

FORMAT

- ▶ **Body Normal:** Formats selected text as 'Body Normal'.
- ▶ **Body Small:** Formats selected text as 'Body Small'.
- ▶ **Header Capitalized:** Formats selected text as 'Header Capitalized'.
- ▶ **Header Normal:** Formats selected text as 'Header Normal'.
- ▶ **Header Secondary:** Formats selected text as 'Header Secondary'.
- ▶ **Source:** Formats selected text as Source.
- ▶ **Reset Spacing:** Resets the line and paragraph spacing of selected rich text.

IMAGES

- ▶ **Copy Info to Comment:** Copies basic image info to the comment field.
- ▶ **Flip Horizontal / Vertical:** Flips the image horizontally/vertically.
- ▶ **Rotate Left / Right:** Rotates the image left/right.
- ▶ **Landscape to Portrait:** Rotates only landscape images to portrait.
- ▶ **Portrait to Landscape:** Rotates only portrait images to landscape.
- ▶ **Scale to 1024 pixels wide:** Scales the image to 1,024 pixels wide.
- ▶ **Scale to 1024 pixels:** Scales the image to 1,024 pixels.
- ▶ **Scale to 200%:** Scales the image to 200 percent.
- ▶ **Scale to 50%:** Scales the image to 50 percent.

Note: While these scripts work also with PDF documents it is not advisable to do so. The functions used only act on the first page of a multi-page PDF and the resulting document will contain the first page only.

IMPORT

These scripts demonstrate DEVONthink Pro Office's ability to import data from various sources, including web sites.

- ▶ **Astronomy Picture of the Day:** Imports the Astronomy Picture of the Day.
- ▶ **References from Bookends:** Imports multiple references from Bookends into a newly created group named "Bookends". Already imported references are skipped. Requires Bookends 11.3.2 or later.
- ▶ **Daily Dilbert:** Imports the Daily Dilbert.
- ▶ **Del.icio.us:** Imports your [del.icio.us](#) bookmarks. The descriptions are used to name the imported bookmarks, the notes and the tags are added to the comments. If the keychain does not contain a key for del.icio.us, dialogs pop up allowing you to enter the user name and password.
- ▶ **EverNote file (.enex):** Imports notes exported from [EverNote](#) in EverNote's exchange format (.enex). Notes are stored as HTML files with formatting; images and attachments are not imported.
- ▶ **Man Page:** Imports a UNIX manual page as a PDF document.
- ▶ **Mars Explorer Rover Mission Im.:** Imports Mars Explorer Rover Mission Images.
- ▶ **Perldoc:** Imports the documentation of Perl pages, modules, functions, or programs.
- ▶ **Phone List:** Imports all phone numbers from Apple Address Book.
- ▶ **This week's MacDesktops:** Imports this week's MacDesktops.

The following scripts import chatlogs and call logs from popular instant messaging clients as well as from your mobile phone:

- ▶ **Adium Chatlogs:** Imports all your chatlogs from the [Adium](#) instant messaging client, converts them to readable HTML, and stores them in your database. The Mac OS X Address Book is used

to resolve instant messaging account names if possible.

- ▶ **BluePhoneElite Calls:** Imports your mobile phone call logs from [BluePhoneElite 2](#).
- ▶ **BluePhoneElite SMS:** Imports your SMS messages from your mobile phone via [BluePhoneElite 2](#).
- ▶ **iChat Chatlogs:** Imports your iChat chatlogs.
- ▶ **Second Life Chatlogs:** Imports your [Second Life](#) chatlogs.

REMINDERS

- ▶ **Add as Event to Calendar:** Adds a new event to Calendar or iCal linking back to the selected item in DEVONthink Pro Office.
- ▶ **Add as To Do to iCal:** Adds the selected item as a to do item to iCal.
- ▶ **Add as To Do to OmniFocus:** Adds the selected item as a to do item to [OmniFocus](#).
- ▶ **Add as To Do to Reminders:** Adds the selected item as a to do item to Reminders.
- ▶ **Add as To Do to Task Paper:** Adds the selected item as a to do item to [Task Paper](#).
- ▶ **Add as To Do to The Hit List:** Adds the selected item as a to do item to [The Hit List](#).
- ▶ **Add as To Do to Things:** Adds the selected item as a to do item to [Things](#).

RENAME

- ▶ **Add Prefix:** Adds a prefix to the titles of selected documents.
- ▶ **Add Suffix:** Adds a suffix to the titles of selected documents.
- ▶ **Append Selected Text:** Appends the selected text to the title of the currently selected item.
- ▶ **Replace Text:** Replaces a text passage in the titles of selected documents.
- ▶ **Selected Text:** Sets the title of the currently selected item to the selected text.
- ▶ **To Subject:** Sets the titles of the selected documents to the subject lines of the email messages if the selected documents are email messages.
- ▶ **To Webpage Title:** Sets the titles of the selected documents to the names of the web pages pointed to by their URL fields.

SHEETS

Even though DEVONthink Pro Office is no spreadsheet application, it does have these scripts that exemplarily implement basic sum and mean value functionality for sheets.

- ▶ **Add Multiple Records:** Adds up to 999 empty records to a sheet.
- ▶ **Column Sum&Mean Value:** Calculates the sum and average of a table column.
- ▶ **Row Sum&Mean Value:** Calculates the sum and average of a table row.
- ▶ **Check sums in last column:** Checks the sums in the last column on validity.

TOOLBAR

By default this contains no scripts. Add your own scripts here and add them also to the toolbar of [main](#) and [search windows](#) using [View > Customize Toolbar](#).

THUMBNAILS

- ▶ **Flip Horizontal / Vertical:** Flips the thumbnails of selected documents horizontally/vertically.
- ▶ **Rotate Left / Right:** Rotates the thumbnails of selected documents left/right.
- ▶ **Landscape to Portrait:** Rotates only landscape thumbnails to portrait.
- ▶ **Portrait to Landscape:** Rotates only portrait thumbnails to landscape.

Note: While these scripts work with all image formats including PDF, they should not be used for PDF documents. They will only work on the first page of the PDF and destroy all embedded metadata.

ABOUT THIS MENU

Shows an information dialog window about the Scripts menu.

BROWSERS, EMAIL, RSS READERS

AppleScript is perfectly suited for integrating different applications, interchanging information, and creating workflows. DEVONthink Pro Office comes with a number of scripts that copy

information from other applications, like Safari or Mail, to DEVONthink Pro Office. You may use these scripts as a template for connecting DEVONthink Pro Office to your own applications.

To install these scripts completely automatically, [click here](#) or select *DEVONthink Pro Office > Install Add-ons*, check *Application Scripts* and *DEVONthink Pro Scripts*, and click *Install*. You access them via the *global script menu extra*.

Note: The application-specific scripts (put into sub-folders of "~/Library/Scripts/Applications") appear only within the application they were designed for ([see introduction](#)). To see them, activate their designated application, e.g., by bringing one of its windows to the front. The other scripts are located in a sub-menu named "DEVONthink Pro".

DEVONAGENT, CHROME, OMNIWEB, AND SAFARI

These scripts import elements from a displayed web page in Safari, [Google Chrome](#), [OmniWeb](#), [Firefox](#), [Camino](#), or [DEVONagent](#) to DEVONthink Pro Office.

- ▶ Add abstracts to DEVONthink Pro (DEVONagent only)
- ▶ Add page to DEVONthink
- ▶ Add linked images to DEVONthink
- ▶ Add linked images to DEVONthink's downloads
- ▶ Add links to DEVONthink
- ▶ Add links to DEVONthink's downloads
- ▶ Add PDF document to DEVONthink
- ▶ Add selection to DEVONthink
- ▶ Add tabs to DEVONthink (DEVONagent only)
- ▶ Add text to DEVONthink
- ▶ Add web document to DEVONthink

Note: Not all of these options are available for all browsers.

The scripts add the currently displayed page or image, the selection or the text of the current page, the linked images of the current thumbnail gallery, or the links of the current page from your browser to DEVONthink Pro Office or its download manager.

EMAIL APPLICATIONS

Note: DEVONthink Pro Office comes with much [advanced email archiving functions](#). Have a look at them before using these scripts.

Starting with Mac OS X 10.5 Leopard you can drag messages from Apple Mail to DEVONthink Pro Office to import them. In addition you can use the provided scripts or just transfer selected text to DEVONthink Pro Office by using the [Services](#) menu. DEVONthink Pro Office comes with scripts for Apple Mail, [Microsoft Entourage](#), and [Microsoft Outlook 2011](#).

DEVONthink Pro Office provides the following scripts:

- ▶ Add message(s) to DEVONthink
- ▶ Add mailbox(es) to DEVONthink
- ▶ Add attachments to DEVONthink
- ▶ Add message(s) & attachments to DEVONthink

They are located in the respective sub-folder for their target application, copy selected messages, mailboxes, attachments, or both messages and their attachment from Apple Mail, Microsoft Entourage, or Outlook to the currently open DEVONthink Pro Office database. If possible, they set the creation and modification dates of the imported messages to the receipt date and the URL field to the sender's address. Both *Add mailbox(es)* scripts also recursively import mailboxes inside the selected mailboxes and rebuild the mailbox hierarchy within a group named *Entourage Mail* or *Apple Mail* in the currently open DEVONthink Pro Office database.

Note: Not all scripts are available for all email applications.

RSS NEWSREADER

These scripts, namely the script named *Add news to DEVONthink*, allow you to add selected or flagged news from [NetNewsWire](#) and [Endo](#) to the currently open DEVONthink Pro Office database. If correctly installed (see above), select any news you want to copy to your database and select the script from the *global script menu extra*.

OTHER SCRIPTS

The remaining scripts designed for the script menu extra allow you to copy selected text to your database, or to create a link to the front-most document. They're grouped in the *DEVONthink Pro* sub-menu.

- ▶ **Copy Selection:** Copies the selected text and creates a new plain text document in the [default destination](#).
- ▶ **Link to current document:** Indexes the front-most document (for example, a PowerPoint presentation or an Excel spreadsheet) and places the indexed document in the [default destination](#). Handy when you are working on a document and want to quickly place a reference to it in DEVONthink Pro Office.

TRIGGERED SCRIPTS

Triggered scripts are AppleScripts that you attach to an item in DEVONthink Pro Office (a group or document) and that are executed each time you display this item (like selecting it in Split view). Items with attached triggered scripts show an AppleScript icon behind their name.

Using triggered scripts, you can bring your items to life and let them act intelligently on various parameters. Examples for triggered scripts can be found in the folder "Extras/Scripts/Triggered" on the DEVONthink Pro Office disk image.

ATTACHING A TRIGGERED SCRIPT

Besides creating scripts that attach themselves to an item, you attach them manually by doing the following:

- ▶ Select the document you want to attach a script to.
- ▶ Open the [Info panel](#) ('Tools > Show Info').
- ▶ Click *Select* next to the *Script* field and select the script to attach.

REMOVING A TRIGGERED SCRIPT

To remove a triggered script from an item, do the following:

- ▶ Select the item you want to remove the triggered script from.
- ▶ Open the [Info panel](#) ('Tools > Show Info').
- ▶ Select the contents of the *Script* field and delete it.

DROPLETS, FINDER PLUGINS, MAIL RULES, PDF SERVICES

DROPLETS

Droplet are little AppleScript applications that allow you to run actions based on files or folders dropped on them. You can create them easily using the AppleScript editor; some useful examples already come with DEVONthink Pro Office on the disk image in 'Extras/Scripts/Droplets'. Basically, they do what their name suggests:

- ▶ **Import Droplet:** Imports files and folders dropped into droplets.
- ▶ **Import Index Droplet:** Indexes files and folders dropped onto it.

Using Droplets: Place a droplet anywhere you like and optionally drag it to the *Dock*. Then, drag the files and folders you want the droplet to act on onto its icon in the Finder or the Dock.

FOLDER ACTIONS

Folder Actions are scripts that you can attach to folders in the file system and that act on all items you add to these 'hot folders'. DEVONthink Pro Office comes with three folder action scripts that you can install using the [DEVONthink Pro Office > Install Add-Ons](#) menu option:

- ▶ **DEVONthink — Import:** Imports files into your databases.
- ▶ **DEVONthink — Import & Delete:** Imports files into your database and moves the files to the trash afterwards.
- ▶ **DEVONthink — Import, OCR & Delete:** Imports files into your database, converts them to searchable PDFs if necessary, and moves the files to the trash afterwards.

- ▶ **DEVONthink — Import to selected group:** Imports files to the currently selected group.
- ▶ **DEVONthink — Index:** Adds references to the files to your database.
- ▶ **DEVONthink — Index to selected group:** Adds references to the files to the currently selected group.

Attaching a Folder Action: To attach a folder action script to a folder, do the following:

- ▶ Right-click the folder.
- ▶ Select *Attach a Folder Action* from the contextual menu.
- ▶ Select the folder action script you want to attach and click *Choose*.

Manage Folder Actions: To manage all your folder actions, right-click a folder and choose *Configure Folder Actions* (Mac OS X 10.5) or *Services > Folder Actions Setup* (Mac OS X 10.6) from the contextual menu. Use the Folder Actions Setup utility to see which folders have scripts attached, and to remove folder actions from folders.

MAIL

Using rules in Apple Mail you can automatically process incoming messages, e.g. move them to another mailbox or mark them as read. In addition you can process them with scripts that e.g. archive them or their attachments in your database. DEVONthink Pro Office provides the following scripts:

- ▶ Mail Rule - Add messages to DEVONthink Pro
- ▶ Mail Rule - Add attachments to DEVONthink Pro
- ▶ Mail Rule - File messages & attachments

To use these scripts, do the following:

- ▶ Open the "Scripts/Mail" folder on the DEVONthink Pro Office disk image.
- ▶ Put the script anywhere on your hard disk.
- ▶ Create a new rule in the preferences window of Apple Mail.
- ▶ Define your criteria.
- ▶ Add the *Execute Script* action.
- ▶ Select the script you want to use.

If you're running OS X 10.8 or later use [DEVONthink Pro Office > Install Add-Ons](#) to automatically install the scripts into Apple Mail's mail rule scripts folder. You can then select them from a pop-up menu when you add the *Execute Script* action.

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 Pro Office adds an alias of itself to the PDF Services folder.

Installation: To install the PDF Services alias select [DEVONthink Pro Office > 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 Pro Office, open it in its creator application (this could even be DEVONthink Pro Office 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 Pro Office* (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.

MORE EXAMPLES

Some of these scripts do things that have already been implemented as 'real' commands in DEVONthink Pro Office, others are functions you will seldom use. All of the scripts are more example than everyday functions, yet all can be of real use.

- ▶ **Create Contacts:** Copies all entries of the Mac OS X Address Book to DEVONthink Pro Office, like [File > Import > Addressbook](#).
- ▶ **Cross-linked Text:** Links selected text to currently visible document. Demonstrates how to programmatically add links to a rich text document.
- ▶ **Export daily backup as files & folders:** Exports all items of the database as files and folders as a daily backup.

- ▶ **Export to iPod:** Exports selected documents as notes to an attached iPod (3rd Generation or later), like [File > Export > to iPod](#).
- ▶ **Export to OPML:** Exports selected documents as OPML file, like [File > Export > as Outliner Processor Markup Language](#).
- ▶ **Fancy Text:** Demonstrates some of the rich text scripting capabilities of DEVONthink Pro Office.
- ▶ **Import Feed:** Demonstrates how you can access RSS feeds from DEVONthink Pro Office via AppleScript.
- ▶ **Latest Macintosh News:** Downloads the latest news from a number of RSS feeds and stores them in the database.
- ▶ **Merge:** Merges multiple selected document to one long document, like [Data > Merge](#).
- ▶ **Move to Done:** Moves the selected item(s) to the group Done in the top level of the database.
- ▶ **Open In PhotoStickies:** Opens selected images in [PhotoStickies](#).
- ▶ **Open In Preview:** Opens selected images in Preview.
- ▶ **Prepare Backup:** Creates a backup of the database at a chosen location (like the Desktop), and makes it a Zip archive that can be comfortably copied to an external medium, an online drive, or a writable disc.
- ▶ **Quick Look:** Opens a Quick Look head-up-display window for the selected item.
- ▶ **Show recommended groups:** Shows the groups recommended by DEVONthink Pro Office's artificial intelligence for the selected document.
- ▶ **Synchronize:** Triggered script that synchronizes the item it is attached to each time it is viewed. Can be used to keep a group always synced with its counterpart in the file system.

You can also find more scripts in the *Extras* area of the [Support Assistant](#).

AUTOMATOR

DEVONthink Pro Office also comes with a bundle of integrated Automator actions that you can use to create your own Automator workflows.

To see which actions DEVONthink Pro Office provides, open a new workflow in Automator and click the Actions button, then search for

DEVONthink Pro Office in the Library. Automator then displays all actions contained in the application. Select any action to show a short description about what the action does.

Note: Cannot find the Automator action you need for your workflow? [We're open to suggestions!](#)

OVERVIEW

We have created some workflow examples that show you how to use Automator and DEVONthink Pro Office together. This document explains what the workflow examples are supposed to do, and how you can adapt them for your situation. The examples are presented here are grouped around common functionality.

FILE MANAGEMENT

Managing files with DEVONthink Pro Office is one of its best features. Here are different ways to work with the information in the database.

Move Existing Files: You have a folder with files that you think are in control by DEVONthink Pro Office, but you want to move the files that are guaranteed to be found in the database to a different folder (let's say 'Archive'). This workflow will solve this problem for you. For the given files/directories, it will find all files, and ask the database if items exist with these paths. For the ones that are found to exist, move these to a specified folder.

Note: The exact locations have not been defined in this workflow, that is up to you. DEVONthink Pro Office will keep track of the moved files, so you don't have to change anything in the database.

To improve your workflow, specify a specific database to use by prepending the *Filter Items* action with an *Open Database* action. In general, it's a good idea to specify the database a workflow has to act on.

Add and Move Missing Files: Find out what files are not in the database by changing the value in the *Filter Items* to *Missing* in the previous workflow. Then we use the *Move Finder Items* action to place these files in their rightful place in our folder hierarchy.

These files will be sent to the *Add Items to Current Group* action after setting the destination group, this will index the files into the database.

To improve the workflow, specify a database to use by prepending the *Filter Items* action with a *Open Database* action. In general, it's a good idea to specify the database a workflow has to act on.

Start Workday: This workflow is something you'd start every day when you're ready for work. It is rather complicated but really shows off what you can do. Let's go through the steps:

- ▶ **Step 1 to 2:** We create the 'Today: To Do' group in the example database. This way we can be sure that the next step has a group to work on.
- ▶ **Step 3:** Then we run another workflow: Clean Today's To Do. Here we completely clean the contents of the 'Today: To Do' group. By the way you may want to switch off the confirmation to delete every record in Step 4 of this workflow, as long as you don't add items by hand to this group!
- ▶ **Step 4:** Here you can specify the different records throughout your database you're working on.
- ▶ **Step 5:** We only get the records that we're not marked as ready ('unchecked').
- ▶ **Steps 6 to 7:** These are replicated to 'Today: To Do' list. This will also open a new window with the items you want to work on today.
- ▶ **Step 8:** Get every record including the ones in sub-groups.
- ▶ **Step 9:** Get the file paths from these records.
- ▶ **Step 10:** Open the external files in the Finder. You're ready to start working!

End Workday: At the end of your day, you'd like to make sure that the database is updated with the modified contents of the files you've been working on. That's the goal of this workflow. It synchronizes every record in your 'Today: To Do' group.

Copy Checked Records to iPod Notes: Whenever you feel like showing off to your colleagues that you have the coolest gadgets and software, you can use this workflow to get the text of the finished work in your To Do list and send it to your iPod. The order in which your notes will appear depends on the sort order of the records in the 'Today: To Do' window.

WEB MANAGEMENT

Dealing with the web is where DEVONthink Pro Office really shines. Here are a few workflows that help you manage the information you're gathering from the Internet.

Capture Safari Page: Another take on getting information from Safari. If you save this example as an application and put it into your *Dock*, you can very easily get the information from the current web page in Safari into your database. This is because the *Add Items to Current Group* workflow will actually download the given URL so that its contents can be made available for searching.

Convert URLs to Webarchive: This workflow shows how you can convert URLs to webarchives. Let's go through the steps:

- ▶ **Step 1-2:** Make sure to select the records with URLs that you want to replace inside DEVONthink Pro Office.
- ▶ **Step 3:** We download the URLs in DEVONthink Pro Office.
- ▶ **Step 4:** We want to use temporary files so we store them in a variable to refer to them later.
- ▶ **Step 5:** Back in DEVONthink Pro Office, we create a 'Converted Web Pages' group.
- ▶ **Step 6:** Here we import the files. Note that we import them because we regard the documents as temporary files in Step 3, DEVONthink Pro Office will copy the files to the database file folder for its own safe keeping.
- ▶ **Step 7-8:** We retrieve the list of files and send them to the Finder's Trash.

Gather Information from Safari: The next two workflows are not great for our bottom line, yet we've decided to present these helpful hints free of charge! The first in the series is a script that gets all the links (within the domain of the starting page) from Safari's open web pages and puts these into a special group called 'Temporary Safari Links'. For each entry in this group, you can see its status. The contents will be indexed (so loading these may take a while).

Now you can go and do some searching for information you want. For the records in this group that match your criteria, you will set the state to 'checked'.

Store Information from Safari: The second and last workflow in this series will clear up the mess we made. It gathers all the checked records and asks to move these to a group you specify (note that for this action we specified that the action has to be shown).

Also, take a look at Step 8, here we have to *Ignore Result from Previous Action*, because we don't want you to delete the work that you spend so much time on! The remaining records in the temporary group will then be deleted.

Now, why are these two workflows bad for our bottom line? Because they compete with DEVONagent Pro. (Although, truth be told, DEVONagent Pro does a much better job at this then we can emulate with a couple of Automator workflows).

OTHER WORKFLOWS

Of course, Automator workflows can also be used to manipulate items in the database.

Set Attributes Recursively: A simple workflow that, when saved as an application, deserves a place in the *Scripts* menu. It is relatively simple:

- ▶ Get the record selection from the DEVONthink Pro Office.
- ▶ If the selection contains groups, recursively add all records contained in these.
- ▶ Set the record attributes but make sure to make this visible when running so you can change different attributes when you run it. This is especially important when you save the workflow as an application.

Add in Finder: Save this workflow as a Finder plugin; then you can import a file selection from the Finder into a group that you select in an open database. You should remove the first action and

name it 'Add to DEVONthink Pro'. Then you will see it in the Finder's contextual menu in *More > Automator*.

Combine PDF Records: Use this workflow to combine one or multiple selected PDF documents. As this workflow uses Preview to do its magic, metadata and annotations will be lost.

Compress PDF to 96dpi: Compresses images contained in PDF records to 96dpi, this can be useful if you have scanned documents and want to reduce the file size by optimizing them for on-screen display only.

Open DEVONthink Spotlight Item: Opens the selected DEVONthink items listed by a Spotlight search in the external applications assigned to their type.

APPLESCRIPT-BASED WORKFLOWS

Store Safari Selection in Specified Group: This is an example for more advanced scripting users. It uses AppleScript inside an Automator action to achieve a goal that is not possible with the existing actions.

Store DEVONagent Selection in Specified Group: Identical to the previous action in functionality but it uses [DEVONagent Pro](#) instead. Note that DEVONagent Pro comes with its own convenient collection of actions that allow you to create sophisticated workflows in combination with DEVONthink Pro Office.

Convert Selection using OCR: Convert selected images stored in DEVONthink Pro Office using the built-in optical character recognition (OCR) into searchable PDFs. Things to look out for in the AppleScript code are the timeout and the possible error codes that can be returned during the conversion.

TROUBLESHOOTING

In this chapter:

Repairing a defective database	115
DEVONthink Pro Office crashes when opened	116
Recovering a lost password	116
Items keep re-appearing in the inbox	117
Problems importing files	117
Email import does not work as expected	117
AppleScript scripts do not work as expected	117
Problems using Services	117
DEVONthink Pro Office behaves irrationally	118
Problems synchronizing with DEVONthink To Go	118

DEVONthink Pro Office 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 Pro Office 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 strangely or if DEVONthink Pro Office 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 Pro Office 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 Pro Office 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 Pro Office 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 Pro Office 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 Pro Office 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 Pro Office 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 Pro Office's index are stored independently within the database package the index can be rebuilt at any time without you losing too much metadata. To rebuild the database from scratch use [Tools > Rebuild Database](#).

The global inbox database cannot (yet) be rebuilt using the steps above. Use the following steps to rebuild the global inbox database manually:

- ▶ Quit DEVONthink Pro Office.
- ▶ Move `~/Library/Application Support/DEVONthink Pro 2/Inbox.dtBase2` to the Desktop.
- ▶ Open the moved database by double-clicking on it

- ▶ Rebuild it.
- ▶ Move everything from the moved database to the now empty global inbox.
- ▶ Quit DEVONthink Pro Office, delete the moved 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 package. To access the contents of the package, show the database package in the Finder, right-click it, and choose *Show package contents* from the contextual menu. 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 Pro Office's Dock icon. Please do not change anything here except for rescuing the orphaned files.

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 database package in the Finder, right-click it, and choose *Show package contents* from the contextual menu. 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 PRO OFFICE CRASHES WHEN OPENED

If a database is heavily damaged it can happen that DEVONthink Pro Office 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 Pro Office 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 Pro Office keeps in the [Preferences, Backup tab](#).

To revert to one of the internal backups, quit DEVONthink Pro Office and locate the database package in the Finder. Then do the following:

- ▶ Select the database in the Finder, choose "Show Package Contents" in the contextual menu
- ▶ Copy (!) the most recent Backup folder to the desktop
- ▶ Copy (!) the Files.noindex folder into the copied (!) Backup folder
- ▶ Add the file extension .dtBase2 to the Backup folder

Now you should be able to open the copied Backup folder as a new database by double-clicking it. Afterwards use [Tools > Verify & Repair](#) to ensure that everything's fine.

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 Pro Office

- ▶ Locate your protected database in the Finder
- ▶ Right/Control-click it and choose *Show Package Contents*
- ▶ Move the file 'Settings.plist' to the Trash

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

ITEMS KEEP RE-APPEARING IN THE INBOX

If files keep re-appearing in your global inbox even though you definitely have deleted or moved them in DEVONthink Pro Office, it may be that some files with bad permissions got locked up in the Inbox folder.

Open the folder '~/Library/Application Support/DEVONthink Pro 2/Inbox' (where ~ is your user's home directory) and delete them manually. This should keep them from re-appearing.

PROBLEMS IMPORTING FILES

WHY DOES DEVONTHINK PRO OFFICE NOT RECOGNIZE MY FILES?

If DEVONthink Pro Office does not recognize a file make sure it has a proper file name extension. DEVONthink Pro Office 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 PRO OFFICE 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 Pro Office 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 Pro Office 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 Pro Office, 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 Pro Office to extract the text for searching and classifying.

EMAIL IMPORT DOES NOT WORK AS EXPECTED

Dragging a message thread from Apple Mail does not work, the currently selected messages will be imported instead. Also, mailboxes, to-dos, and more than one RSS article will not work. This applies also for dragging to the Sorter.

APPLESCRIPT SCRIPTS DO NOT WORK AS EXPECTED

Running a script inside DEVONthink Pro Office that uses OCR will fail with a timeout. Run the script outside of DEVONthink Pro Office instead.

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 Pro Office 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 PRO OFFICE 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 Pro Office'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 Pro Office 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 databases 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 the database in question 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

In this chapter:

General questions	119
Release schedules, Mac OS X, and Windows	119
Purchasing	120
Mac App Store	121
Your software license	122
Product-related questions	122

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

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

Note: If you purchased or plan to purchase DEVONthink Pro Office in the Mac App Store please [click here to learn more about the differences](#) between our shop and the Mac App Store.

How do I purchase an upgrade? Please use [DEVONthink Pro Office > 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 Pro Office 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 institutions 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 do apps purchased in the Mac App Store differ? The Mac App Store requires so-called "sandboxing" of all apps. Sandboxing puts the apps into a closed environment and restricts access to e.g. files, networks, printers, etc. Therefore many apps sold through the Mac App Store have less features than their counterparts available outside of the Mac App Store.

Do you charge for updates in the Mac App Store? No, updates are generally free in the Mac App Store (and we don't charge for them outside of the Mac App Store, too).

Why are updates available always later than in your shop? All apps sold through the Mac App Store are reviewed by Apple before being released. Therefore new versions appear immediately on the DEVONtechnologies website but have to pass Apple's review before appearing also in the Mac App Store.

Do I get a license code? Apps purchased in the Mac App Store do not come with a license code but are "signed" directly before downloading for your iTunes account.

Do you offer bundles in the Mac App Store? No, bundles are not supported by the 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 we don't have access to the refund mechanism. Please contact Apple's Mac App Store support for a refund.

YOUR SOFTWARE LICENSE

Why does DEVONthink Pro Office 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 Pro Office 1.x license not work anymore? DEVONthink Pro Office with version numbers greater than 1.x are paid upgrades. To use them you may need a new license code. Please use [DEVONthink Pro Office > 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 Pro Office.

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

TECHNOLOGY

In this chapter:

General Concept	123
Features	123
Structure	123
Applications	124

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

In this chapter:

At a Glance	125
DEVONthink	125
DEVONthink To Go	126
DEVONagent Pro	126
DEVONagent Express	127
DEVONagent Lite	128
DEVONnote	128
Needful Things	129

Besides DEVONthink Pro Office, 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 [See also p. 5ff](#) 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

[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

In this chapter:

Glossary	131
FAQ (product-specific)	132
Iconology	135
Tagging	135
File Formats	136
Templates	139
Web site export templates	142
Search operators	142
Template tags for Wiki-style links	145
Metadata	145

In the appendices you will find additional information that helps you getting familiar with DEVONthink Pro Office 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 Pro Office.

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 Pro Office [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. 51ff](#)
- ▶ **View (1):** The layout for a DEVONthink Pro Office [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. 68ff](#)
- ▶ **Window:** DEVONthink Pro Office 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 Pro Office. You can create and open as many databases as you like.
- ▶ **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. Set in [Preferences](#), [Import tab](#).
- ▶ **Group:** A collection of documents or other groups inside the database. Similar to a folder in the file system. [See also p. 37ff](#)
- ▶ **Global Inbox:** A special database serving as a destination for incoming data. Always opened when DEVONthink Pro Office is started and accessible through the [sidebar](#).
- ▶ **Inbox:** A special group for data coming in to a database. The inbox can be set as the default destination in [Preferences](#), [Import tab](#).

- ▶ **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 Pro Office 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 Pro Office tries to add it as a proper feed document if possible. DEVONthink Pro Office 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. 38ff](#)
- ▶ **Sheet:** A collection of records, structured sets of data, like a spread sheet and presented in a [table view](#). You can use records to store, for example, addresses or list items. [See also p. 73ff](#)
- ▶ **Smart group:** Not a real group but a 'saved search' that appears like a group. Every time you visit this smart group, DEVONthink Pro Office 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

Pro Office 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 Pro Office > 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. 135ff](#)

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 Pro Office support? DEVONthink Pro Office 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. The built-in ABBYY OCR engine does not support Asian languages, Arabic, or Hebrew due to licensing restrictions.

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

DATABASES

Can I use more than one database? Yes, DEVONthink Pro Office works with databases stored in packages instead of a central folder. You can double-click these packages like regular files to open the database, copy them over the local network (LAN) or back up hard drive, or burn them to a CD-R or DVD.

How are my documents stored? DEVONthink Pro Office stores all documents in a package, a folder that looks like a file that you can double-click or otherwise manipulate like a regular file in the Finder.

Inside the 'Files.noindex' folder the actual documents are stored in sub-folders for their respective type and further sub-folders that help DEVONthink Pro Office 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 Pro Office.

In addition, the database package 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 package can contain one or multiple folders named 'Backup.x'. They contain backups of the index files and are created automatically by DEVONthink Pro Office's backup function. They do not contain copies of all actual documents.

How can I move my database to another computer? Your database is a file with the suffix '.dtBase2' and is probably stored in your Documents folder. It can be copied to that or to another desired location on the other computer. If you cannot locate your database, search for it using Spotlight, e.g. by searching for 'dtBase2'.

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 Pro Office application before copying or moving a database, as copying an open database may result in an incomplete or damaged copy.

Can I put my databases on my server? Theoretically yes. However, as DEVONthink Pro Office is not yet multi-user capable, only one copy of DEVONthink Pro Office can access a database at a time. DEVONthink Pro Office uses a 'lock file' to keep other copies of the software from accessing the database at the same time. If you use a setup like this, DO NOT override the appearing warning message or you will create database corruption.

Alternatively consider to use [Web sharing](#) to give other users on the network access to the shared databases using a standard Web browser.

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.

SCANNING & OCR

Does DEVONthink Pro Office support the Fujitsu ScanSnap? Yes, DEVONthink Pro Office comes with an auto-configuration plugin that makes the ScanSnap send all incoming scans directly to your database. OCR makes the scans searchable.

My scanner is not supported by Mac OS X. Does it support TWAIN? If your scanner does not come with an Image-Capture-compliant scanner driver you might want to check if it works with the [TWAIN SANE bridge](#).

Which OCR engine do you use? DEVONthink Pro Office is equipped with the latest [ABBYY FineReader engine](#). It converts PDFs and image files to PDFs with an invisible text layer behind the actual image. DEVONthink as well as other applications use this text layer to access the textual information and let you select and copy text. During the conversion the image is re-rendered according to the OCR settings. The ABBYY engine used in DEVONthink Pro Office supports most languages uses latin characters as well as Hebrew; Asian languages and Arabic are not yet supported.

EMAIL ARCHIVING

Does DEVONthink Pro Office decrypt GPG encrypted email? No, unfortunately, it doesn't. GPG is not as nicely integrated into the Apple Mail as it would be necessary for DEVONthink Pro Office to decrypt GPG encrypted messages.

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. 38ff](#)
- ▶  Item is indexed, not imported [See also p. 18ff](#)
- ▶  Item is locked [See also p. 38ff](#)
- ▶  Item has a comment [See also p. 60ff](#)
- ▶  Item has a script attached [See also p. 110ff](#)
- ▶  Group is a tag, too [See also p. 135ff](#)

- ▶  Item is a duplicate
- ▶  Item has one or more replicant(s)
- ▶  Item is a duplicate but also has one or more replicant(s) [See also p. 21ff](#)

TAGGING

DEVONthink Pro Office 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 Pro Office 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 Pro Office'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. 132ff](#)

THE TAGS GROUP

Every DEVONthink Pro Office 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 Pro Office 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 Pro Office 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 $\mathbb{A}$ 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 Pro Office 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 Pro Office 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 Pro Office 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 Pro Office 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 Pro Office 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 Pro Office also recognizes plain text file formats defined by third-party applications.

Note: DEVONthink Pro Office imports tabulated text files and vCards, such as .tsv, .csv and .vcf, as [sheets](#). For BibTeX files, keys are supported and added to the sheet.

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

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

OFFICE AND OTHER DOCUMENTS

DEVONthink Pro Office 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 Pro Office 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](#).

EMAIL MESSAGES

DEVONthink Pro Office stores email messages archived from Apple Mail or Microsoft Entourage in the native .eml format and uses [Quick Look](#) for displaying them. Drag them from your email application to a [main window](#), the [Groups panel](#), or

DEVONthink Pro Office's *Dock icon*. Alternatively use DEVONthink Pro Office's [email archiving tool](#) to copy them from your preferred email application to a database.

- **Extensions:** eml, emlX

Note: When dragging email messages from Microsoft Entourage, DEVONthink Pro Office imports them as rich text documents due to a shortcoming in the drag-and-drop implementation of Entourage. In addition you can only drag one message at a time for the same reason.

CHAT LOGS

DEVONthink Pro Office 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

For [Adium](#), [Second Life](#), and [BluePhone Elite](#) DEVONthink Pro Office offers a number of [scripts](#) that directly import all available chat, SMS, and phone logs.

PDF, POSTSCRIPT, SKIM

DEVONthink Pro Office imports and displays Portable Document Format (PDF) files, Skim PDF packages, and PostScript files. DEVONthink Pro Office 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 Pro Office, 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 Pro Office to create a

bookmark documents. DEVONthink Pro Office is especially optimized to accept Safari Bookmarks. Use bookmarks in DEVONthink Pro Office to integrate 'live' content from the Internet seamlessly with local documents.

- **Extensions:** dtLink, ftploc, fileloc, inetloc, mailloc, newslloc, 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 Pro Office 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 Pro Office 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, ompl, ooutline, php, php3, php4, phtml, plist, rdf, rsd, rss, sdef, sgm, sgml, shtml, shtml, tbx, wml, xbl, xhtml, xhtml, xml, xmloutline, xsl, xslt, webarchive
- **Automatic recognition:** DEVONthink Pro Office also recognizes HTML and XML file formats defined by third-party applications.

TABULAR DATA

DEVONthink Pro Office imports various structured file formats and stores their contents as [sheets](#) (e.g. tab-separated values, comma-separated values (TSV/CSV) and [iData](#) files).

- **Extensions:** csv, idata, tdf, tsv

Note: Due to limitation in Mac OS X's Cocoa memory management, sheets are currently limited to 32,767 records.

OUTLINER FORMATS

DEVONthink Pro Office is able to import outliner files created by [OmniOutliner 2.x](#) and other applications in the [OPML \(Outlining Processor Mark-up Language\)](#) file format. When importing OPML files, DEVONthink Pro Office recreates a groups hierarchy. DEVONthink Pro Office also exports documents in the standard OPML format generating one OPML file out of multiple groups and documents.

If DEVONthink Pro Office recognizes an imported OPML file as a news feed a new feed document is created instead of an outline. Feeds can also be exported as OPML for exchange with third-party newsreader.

- **Extensions:** .opml

IMAGE FILES

DEVONthink Pro Office 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 Pro Office as well.

Note: PICT files can still be imported but Mac OS X 10.5 does no longer display them.

MULTIMEDIA FILES

DEVONthink Pro Office displays or plays [QuickTime](#) movies, sounds, [Flash](#) movies and [Shockwave](#) animations. To add movies, sounds, or MP3s to DEVONthink Pro Office, 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:** .SML, .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 Pro Office also supports QuickTime file types provided by third-party components.

TEMPLATES

DEVONthink Pro Office 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 Pro 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. 67ff](#)

PRE-FABRICATED TEMPLATES

DEVONthink Pro Office comes with the following pre-fabricated templates which can serve as examples of what you can do with the template feature.

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 Pro Office 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.

Tabs:

- ▶ **Open Bing:** Opens the [Bing](#) web page in a new tab.
- ▶ **Open Google:** Opens the [Google](#) web page in a new tab.
- ▶ **Open Location:** Asks for a URL and opens it in a new tab.

Toolbar: By default this contains no templates. Add you own templates here and add them also to the toolbar of [main](#) and [search windows](#) using [View > Customize Toolbar](#).

TEMPLATE PACKAGES

Besides the more complex smart templates DEVONthink Pro Office 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 Pro Office 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 the 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.

CREATING SMART TEMPLATES

Smart templates are regular AppleScript scripts or script packages with a special extension to distinguish them from regular AppleScript scripts:

- ▶ **.templatescript:** A normal script, regular extension would be: '.sct'
- ▶ **.templatescriptd:** A script package, regular extension would be: '.scptd'. Script packages are folders that appear like a file. They can hold both script code and additional files.

To make your own smart templates have a look at the pre-fabricated smart templates:

- ▶ **Step 1:** Navigate to '~/Library/Application Support/DEVONthink Pro 2/Templates.noindex' in the Finder and show its content
- ▶ **Step 2:** Make a copy of a template, e.g. of 'Note.templatescriptd'.
- ▶ **Step 2:** Rename the template, replacing the extension '.templatescriptd' with '.scptd'. This makes it a regular script.
- ▶ **Step 3:** Double-click this script to edit it in Script Editor.
- ▶ **Step 4:** Try out the script by simply running it in Script Editor.
- ▶ **Step 5:** When you're satisfied, close the script and in the Finder rename it so that the file name extension '.scptd' becomes '.templatescriptd' again.
- ▶ **Step 6:** Close and open DEVONthink Pro Office again. Your new script should be visible in Data > New now, ready for you to use

Each of the pre-fabricated smart templates demonstrate other aspects of what you could do with them. Just have a look at all of them to learn more about how you can create your own smart templates. You can find more about AppleScript and DEVONthink Pro Office in the chapter [Scripts](#).

Smart templates as well as template packages can be double-clicked in the Finder to install them.

WEB SITE EXPORT TEMPLATES

For the export as web site, DEVONthink Pro Office uses templates available in ~/Library/Application Support/DEVONthink Pro/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](#) as well as in both the interactive and the simple [web interface](#) 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 Pro Office 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 Pro Office 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 Pro Office 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 term1, also as part of a word

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 Spotlight for searches. Enter the vertical ruler character for the OR operator by pressing `⇧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 staring with 'second' within two words range from any word starting with 'effect'.

TEMPLATE TAGS FOR WIKI-STYLE LINKS

In DEVONthink Pro Office 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 Pro Office 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. 39ff](#)

- ▶ %@: 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 Pro Office 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