DEVONthink

VERSION 2.5.2
DOCUMENTATION

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READ ME

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DEVONthink Personal is the paperless office for your Mac. Use DEVONthink Personal to keep all of your

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

together in one database. Use DEVONthink Personal to keep all of this information together so that you have easy access to it. Synchronize your data between all your Macs on the local network, via Dropbox, WebDAV or just any mountable disk.

THE DEVONTHINK PERSONAL ADVANTAGE

WHY DEVONTHINK PERSONAL?

DEVONthink Personal not only stores documents, it is a flexible, powerful organizational tool that helps you

- edit
- analyze
- organize
- find
- and archive

those documents.

INTEGRATED WORKSPACE

Unlike the Finder, DEVONthink Personal provides an integrated environment with all the tools you need for working with information. Don't waste time digging through thousands of files. Let DEVONthink Personal intelligently assist you. And synchronize your data between all your Macs via direct connections, Dropbox, WebDAV, or any mountable disk, e.g., a USB stick.

As a native Mac application, DEVONthink Personal is also tightly integrated with OS X. DEVONthink Personal provides a *Dock menu*, *Services menu* commands, and makes optimal use of the Safari web browser engine.

WHAT CAN YOU DO WITH IT?

DEVONthink Personal is much more than just a document databaseIt is the #1 tool for collecting and organizing info bits and snippets on the Mac.Use DEVONthink Personal to:

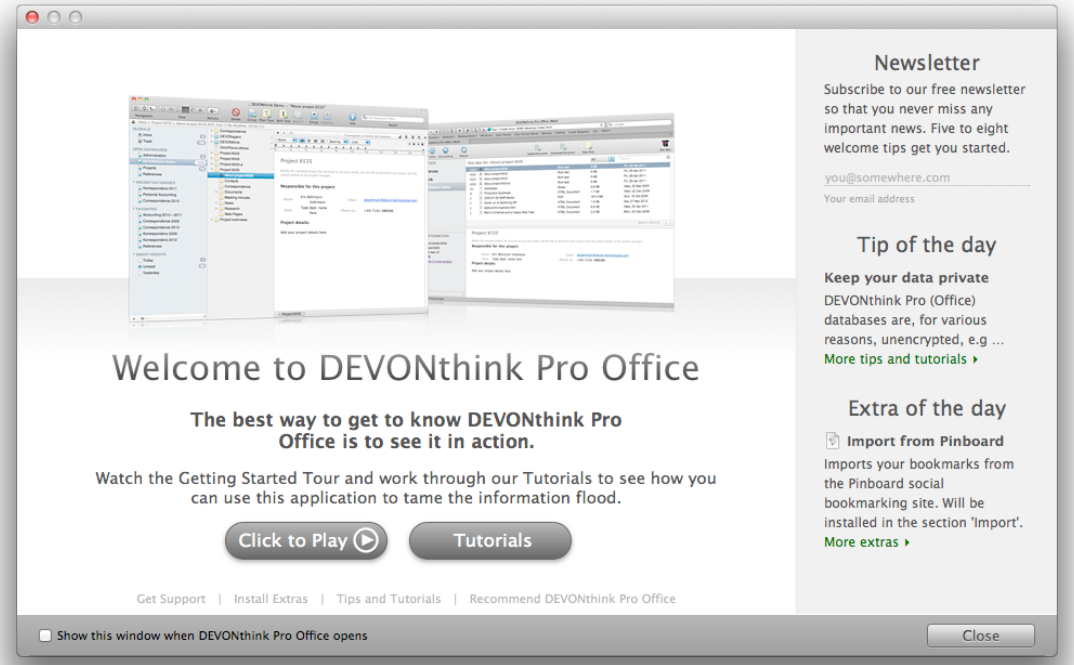
- Create text documents, edit them in full screen mode using all the tools Mac OS X provides and cross-reference them with Wiki-style or static links.
- Use the *Services menu* and the *Dock menu* to clip information and jot down notes.
- Integrate Web content and local documents.
- Store frequently used images.
- Take advantage of {$software}'s file indexing feature to catalog CD/DVD-ROMs without storing them in the database.

EDITIONS

We offer DEVONthink in multiple editions optimized for home/semipro and heavy-duty professional use. You can find a feature comparison on our web site.

GETTING STARTED

DEVONthink Personal is a powerful application that may require time to fully master. Open the Support Assistant to read tips, tricks, and tutorials. Install pre-made templates that extend DEVONthink Personal's functionality.



Other helpful resources are our company blog, where we publish timely news and, sometimes, even public betas, and our lively user form.

Continue here:

- Open the Support Assistant
- Visit our company blog
- Visit our user forum

SYSTEM REQUIREMENTS

A Mac computer with at least 2 GB of RAM, OS X 10.6.8 or later. In addition, we recommend a broadband Internet connection.

> Note: In 32-bit mode or on a computer with an older 32-bit CPU, we recommend keeping the total number of elements the open database below 300,000 items and 200 to 300 million words. Larger databases could become unreliable due to low memory in 32-bit mode.

INSTALLING, UPDATING, UNINSTALLING

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

INSTALLING AND UPDATING

Move the DEVONthink Personal application package to the Applications folder or any preferred directory. Please note that Mac OS X Services and the connection to DEVONagent work only for applications installed into the Applications folder, and that logout and login or a restart is required after installation.

To update an existing version of DEVONthink Personal, simply copy the application package from the disk image to your Applications folder,

replacing the old version. Your database(s) will not be affected. If you purchased DEVONthink Personal in the Mac App Store you can also download the update from the DEVONtechnologies website. It will retrieve the existing receipt and accept it as valid license.

32-BIT VS. 64-BIT MODE

When opened in 64-bit mode DEVONthink Personal is able to use all available physical memory. This means database size database is limited only by the amount of available RAM and the speed of your computer. However, in 64-bit mode DEVONthink Personal 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 Personal application package in the Finder, e.g., by right-clicking DEVONthink Personal'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.

BUYING AN UPGRADE

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

- Click here to check your upgrade options.
- Choose *DEVONthink Personal > Check Upgrade Options.*

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

UNINSTALLING

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

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

VERSION HISTORY

VERSION 2.5.2

This maintenance update not only fixes a number of reported bugs but also improves the synchronization, the Clip to DEVONthink browser extension, the bookmarklets, and many other aspects of the app.

New:

- Clip to DEVONthink indicates that a web address to be added is already present in the currently open databases and allows to reveal the first found document directly from the destination popup menu.
- Both bookmarklets and Clip to DEVONthink can also create rich text documents and can capture the selection as rich text if possible.
- Automatic Wiki links support also names and aliases with only two characters (e.g. for Asian languages).

Improved:

- Synchronization is faster and more reliable. It's also more compatible to damaged databases. Better logging.
- Group selector shows the type of the bookmarklet that opened it.
- DEVONthink Personal creates thumbnails for bookmarks immediately if set to do so in the preferences.
- *Home* and *End* keys can be used in Quick Look panels without activating it first.
- *Activity* panel no longer takes the focus, shows progress smoother, and uses less CPU time.
- Going up, e.g. via the toolbar or the Go menu, retains the selection if possible.
- Importing of QuickTime movies (in 64-bit mode)
- Text views don't scale too large attached images anymore.
- Indexing unknown file types now supports *Preferences > Import > Titles > Localized display name.*

- Better recognition of duplicates.
- Faster and more reliable Sync Agent for synchronizing with DEVONthink To Go v1.
- Graphics of Sorter tab updated.
- SkimNotes support updated.
- German and French localizations.
- Overall reliability.

Fixed:

- Several issues related to synchronization in general, sync stores on WebDAV servers, and memory management.
- Several issues related to scanning.
- *Activity* panel containing too many activities didn't use vertical scrollbars.
- Changing the modification date via the *Info* panel changed the creation date.
- Some contextual menu commands appeared even though the selection didn't contain usable data.
- Saving e.g. modified grayscale JPEG images could corrupt the image file.
- Pressing ⌘S cleared the *Sorter's* note instead of saving it.
- Web windows/tabs were sometimes closed/reset after e.g. repairing, optimizing or synchronizing databases.
- Glitches of text rulers.
- Support Assistant didn't work on non-admin accounts due to a permission issue.
- Rare crash after quitting the app in fullscreen mode on OS X 10.7 and up.
- Several minor memory management issues.
- Further minor glitches.

VERSION 2.5.1

This update fixes bugs in the new synchronization, brings better image zooming using gestures, and improves compatibilty to Gatekeeper. It also fixes the broken DEVONthink To Go synchronization and a few minor glitches.

Improved:

- Better error message advising to verify databases that require repair before synchronization.
- Image zooming via gestures on OS X 10.8 Mountain Lion.
- Compatibility to Gatekeeper.

Fixed:

- Synchronization merged duplicate group tags it shouldn't.
- DEVONthink To Go synchronization was broken in version 2.5.
- Further minor glitches.

VERSION 2.5

This release brings synchronization of databases over the local network or via Dropbox, WebDAV, and other mountable drives. The updated paper capture functionality allows directly capturing to DEVONthink Personal and the improved tagging including a *Tags* column in document lists makes tagging multiple items easier. This update also brings new standard editing options, editable creation and modification dates, a rewritten column view, and a number of minor user interface refinements such as fewer unnecessary alerts and sheets.

> Note: If you used previous public betas of the sync technology you need to delete your existing sync stores before using the final version. Please simply delete the sync store folder on your file server, WebDAV drive or on Dropbox. Visit the Dropbox website, navigate to the folder "Apps" and delete sync store folder there. It is named "DEVONthink" or has the name extension ".dtSyncStore". If you haven't excluded the sync store from synchronizing via the Dropbox app you can delete it from the Dropbox folder on your computer, too.

New:

- Synchronization of databases between mutliple locations using direct connections on the local network or via sync stores, e.g. on Dropbox, WebDAV volumes, or any other drive that can be mounted. See also p. 22ff
- Completely rewritten column view.
- *Data > Open With > Other…* allows to open items with any chosen application.
- Smart groups and advanced searches support new predicates; the "Tag is (not) ..." predicate supports wildcards.
- Some new options added to *Preferences > Editing > General*.
- *Link To* submenu added to contextual menu of PDF views for easier linking the selection to other items.
- Thumbnails for images can now be created from the embedded thumbnail or from the actual full image.
- *Info* panel can be opened from action and contextual menus.
- The + and - keys can be used to zoom in and out of images and PDF documents.
- Creation and modification dates can be edited via the *Info* panel.
- Help button added to smart group editor.
- Retina graphics.

Improved:

- Paper capture functionality updated; allows to directly capture to DEVONthink Personal, adds drag-and-drop to queues, and restores the last destination; long names are truncated and PDFs are shown in a PDF view now. In queue mode blank pages can be used as document separators. Scanned pages can be added in reverse order or shuffled, e.g., when scanning all front pages first, then all back pages.
- Better tagging with new smart group predicates, an optional editable *Tags* column, and the possibility to sort by tags; tags can be added to multiple items using the *Tags* bar and the *Info* panel.
- Improved highlighting of occurences in PDF and PostScript documents.
- *File > Export > Files & Folder* split into *Export > Files & Folders* and *Export > Document*.
- The Sorter *Take Note* function stores unsaved notes, its *Save* button is only enabled when there is something to save. A new *Clear* button empties all fields.
- Less unnecessary alerts and sheets.
- An alert (suppressable) is displayed before moving items to the trash.
- *Log* panel wraps long texts.
- Better validation of various menu items in case of no or read-only databases.
- Support improved for Notification Center on OS X 10.8 Mountain Lion.
- Synchronizing with DEVONthink To Go shows a warning when the Mobile Sync group is empty.
- Firefox web browser extension updated.
- Handling of aliases while merging tags and groups.
- More reliable import of web browser bookmarks.
- Improved support for images dragged from Safari.
- Importing both items and enclosing folders, e.g. by dragging from the Finder's List view, no longer creates duplicates.
- Orphaned files are now logged after ignoring errors reported by *Tools > Verify & Repair*.
- Reliability of automatic backups.
- Various other user interface improvements.

- English, French, and German localizations.
- Overall performance, efficiency, and reliability.

Fixed:

- Background operations no longer cancel editing in the active main window.
- Bugs related to displaying, modifying, saving, and exporting images.
- Bugs related to the built-in paper capture functionality.
- Minor Sorter glitches.
- Indexing of binary property lists was broken.
- Name changes in DEVONthink To Go weren't properly applied on the Mac during sync.
- Reloading of web tabs wasn't possible in case of failures (e.g. being offline).
- Last selected and visible range of documents wasn't always restored.
- Last modification of group hierarchy right before quitting wasn't always commited.
- Background operations weren't always committed.
- Status bar wasn't always updated.
- Minor issue after duplicating an ordinary tag via drag-and-drop.
- Minor glitches related to full-screen mode.
- Some rare exceptions and crashes.
- Receipts support for sandboxed App Store version.
- Various minor display glitches.

VERSION 2.4.3

This maintenance release improves OpenMeta support, shows FreeMind mind-maps, and updates the Sorter. A new introduction video better demonstrates how DEVONthink Personal can be used. As always this update further improves the performance and fixes a number of minor issues.

New:

- .ft (FoldingText) added to list of known plain text extensions.
- .mm (mind-map) files are displayed via Quick Look if their default application is FreeMind.
- Left/right arrow keys can be used to expand or collapse multiple selected items in list and outline views, too.
- New introduction video, available via the Support Assistant.

Improved:

- OpenMeta tag support, e.g. more reliable handling of file system events.
- Sorter's Take Note panel better handles images; no more focus ring.
- Currently selected tab is usually retained, e.g. after capturing notes.
- Compatibility of Clip to DEVONthink to certain websites.
- Compatibility to third-party hacks.
- Default ruler units are centimeters on metric systems instead of inches.
- Error handling.
- Localization.
- Overall performance and reliability.

Fixed:

- Crash when initializing the scanner.
- No more degradation of image quality after rotating an image in the scanner interface.
- Tags and title of scanned pages were not always saved.
- Crash when dragging messages from Mailmate, Postbox, or Outlook to the Sorter.

- Sorter accidentally accepted .app files.
- Various glitches of image views on OS X 10.8 Mountain Lion.
- *Send by Email* couldn't attach files with non-ASCII characters in their name on OS X 10.8 Mountain Lion.
- Other minor bugs and glitches.

VERSION 2.4.2

This release makes scanning multi-page documents much more convenient and adds support for OS X 10.8's Calendar and Reminders apps. DEVONthink Personal 2.4.2 improves the first launch experience with 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.
- Exporting an image window supports exporting in other formats.
- The fullscreen slideshow can be opened also with ⌥Space.
- Automatic logging of missing files.

Improved:

- Recognition of duplicates.
- *Make Rich Text* automatically shows the ruler again if it was used the last time.
- 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.
- The new scanner/camera feature's queue cleans up after sending files to DEVONthink Personal.
- 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.
- Moving items to external folders didn't ignore parent groups in the trash.
- Further minor bugs and glitches.

Removed:

- Due to sandboxing the App Store variant of DEVONthink Personal no longer imports Spotlight comments unless the files or folders are already indexed by Spotlight.

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).

Fixed:

- Handling of label predicates in smart group and advanced search editor.
- Sending documents from the new scanner/camera interface to DEVONthink Personal 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.

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 the database is now only limited by the amount of available RAM and the speed of the computer. DEVONthink Personal 2.4 brings scanning to DEVONthink Personal as well as other enhancements and important bug fixes. This update is recommended for all users.

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

DEVONthink Personal and up:

- **NEW:** Scanning and importing images from digital cameras. See also p. 27ff
- **NEW:** Dragging entries from Bookends with ⌘ and ⌥ 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 ⌘^A for *Window > Activity*.
- **NEW:** Dragging multiple messages from Apple Mail is now possible, too.
- **NEW:** App Store version is sandboxed. Exporting Spotlight comments is no longer possible.
- **Improved:** Option "Safari 5 Extension" of Install Add-Ons... panel renamed to "Safari 6 Extension" on Lion and Moutain 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 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 Personal. (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 Personal 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 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 makes the tutorials easier accessible, improves some aspects of the user interface, and fixes a number of bugs and glitches. Mac App Store customers can now seamlessly update to copies downloaded from the DEVONtechnologies website without purchasing another license.

DEVONthink Personal and up:

- **NEW:** Dashboard widget saves entered notes not yet sent to DEVONthink Personal.
- **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 Personal is the default application.
- **Fixed:** DEVONthink Personal 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.
- **NEW:** App Store users can seamlessly update to DEVONthink Personal downloaded from the DEVONtechnologies website.
- **Improved:** Text views use faster, non-contiguos 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.

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SPARKLE

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COMMON TASKS

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

ANALYZE TEXT DOCUMENTS

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

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 specific document collection
- Find relationships between documents or snippets quickly
- Clean up large collections of documents

Continue to read here:

- Import documents from the file system
- Use the See Also & Classify drawer
- Use the AI-enhanced Search function

BROWSE THE INTERNET

Besides being a knowledge and information database, DEVONthink Personal acts as a web browser. This extends the document-based approach to knowledge to the World Wide Web. Because DEVONthink Personal is a database manager, its 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 documents. Whenever you select a web document (bookmark), DEVONthink Personal immediately loads and displays its content live from the Internet in the view/edit pane. You can then archive the complete page to the database for offline viewing.

Possible uses:

- Visit frequently used web sites in a convenient interface
- Integrate "live" content from the web with your other documents
- Grab data from web sites and store it in DEVONthink Personal
- Capture and archive complete web pages

Continue to read here:

- Capture data from the Web
- Create a new URL or HTML document
- View "live" and local HTML pages

CAPTURE DATA FROM THE WEB

Increasingly, information is provided not on paper but directly through Web sites, blogs, online news sites, Facebook, and user forums. DEVONthink Personal offers a variety of options for conveniently capturing data from the Web:

- **Bookmark:** Captures only the address (URL, uniform resource locator) of the page.
- **HTML page:** Saves the source code of the page to the database, but images are downloaded 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:** Grabs selected text/images and hyperlinks, but avoids saving unwanted areas of the page to the database. 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) and hyperlinks if present, and preserve the text information for searches in DEVONthink Personal.

> Note: There are a number of Web sites 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. The page always 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 in one group
- Save data from the Web in future-proof formats such as PDF

Continue to read here:

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

CATALOG YOUR DISKS, CDS, AND DVDS

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

Possible uses:

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

Continue to read here:

- Import or index files
- Search your database
- Launch the original file of an index item

CATALOG YOUR PHOTOS AND MP3 FILES

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

While not designed to replace iPhoto or iTunes, DEVONthink Personal can 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, leave them where they are in the file system. You can index the files instead and access them from within DEVONthink Personal See also p. 31ff

Possible uses:

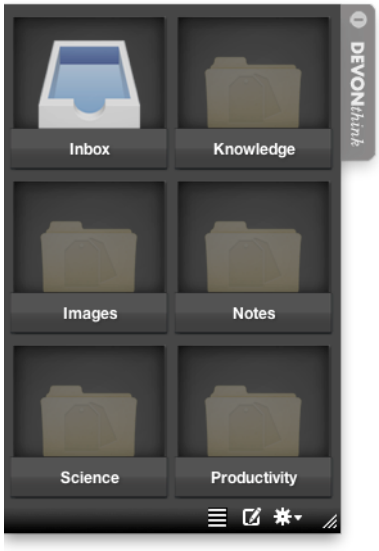
- Create a dedicated database for photos only
- View your images in full screen mode
- Keep project-related images and other documents together
- Play your MP3s from within your work environment

Continue to read here:

- Import or index files
- View files as thumbnails
- View images and movies
- Search your database

COLLECT TEXT SNIPPETS AND OTHER VALUABLE DATA

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



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

DEVONthink Personal automatically sets the title of the newly created snippet to the first line of text, so there's a good chance that you won't even need to rename it. New snippets are always created in the inbox. Also, DEVONthink Personal can automatically classify and file the items 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
- Create an info collection for a specific topic

Continue to read here:

- Capture a note quickly using the Services menu
- Use the Dock menu
- Drag text clippings to the Groups panel

INDEX FILES ON YOUR HARD DISK

Besides completely importing documents, DEVONthink Personal can also index files. When indexing files, DEVONthink Personal reads the contents of the file and stores it for internal reference, yet it always uses the external file for

displaying the actual contents. Use indexing for easily accessing information stored on CD-ROMs, creating a library of all important documents regardless where they are physically stored, or integrating files stored elsewhere with your documents in DEVONthink Personal.

Possible uses:

- 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 indexed item

MANAGE YOUR BOOKMARKS

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

If you want to open the Web page 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
- Grab data from web sites and store it in DEVONthink Personal

Continue to read here:

- Create a new bookmark document
- View "live" and local HTML pages
- Drag URLs to the Groups panel

TAKE NOTES

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

Use DEVONthink Personal's *Take Note* panel or its *Dock menu* to quickly create new notes, write notes using 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
- Take quick phone messages
- Keep project notes and your other project-related documents together

Continue to read here:

- Create new documents
- Create a new note using the Dock menu
- Revise notes and documents using the built-in rich text editor
- Organize your data using Classify and See Also

WRITE TEXTS AND OUTLINE PROJECTS

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

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

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

Possible uses:

- Write notes, white papers, and letters
- Write and organize book chapters

- 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

IN & OUT

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

DRAG AND DROP

The easiest way to add data to DEVONthink Personal, other than creating the documents directly inside the application, is to drag files or selected data, e.g. text, images, etc., into a DEVONthink Personal window or onto its Dock icon.

Dragging files into a document list imports the file; dragging text or images creates documents for them. Dragging files into a rich text document adds them as attachments to the document. Dragging data to the Dock icon creates new documents in the default destination.

IMPORTING AND INDEXING

You import files with drag-and-drop or using the *File > Import* menu item. Imported files are copied into the database and appear as a document in DEVONthink Personal's interface.

If you need to keep the files in their original location, but want to use them inside of DEVONthink Personal, drag them with ⌘ and ⌥ pressed (like making an alias in the Finder) or use *File > Index.* A reference to the file is inserted in your database and linked to the original outside DEVONthink Personal. Use *File > Update Indexed Items* to update selected references when their original has changed. Make sure to keep the original file in place so that the link between reference and file stays intact.

When to import and when to index files? Importing copies the data directly into your database, creating a self-contained repository that remains intact whether you back up the database or copy it to a USB stick. But if you also need to access the files rom outside the database, e.g. to compile some source codes, you may want index them instead of importing.

SERVICES

The *DEVONthink Personal > Services* menu gives you access to special commands published either by other applications, such as TextEdit or Safari, or by services extensions such as DEVONtechnologies' WordService or CalcService. Also, DEVONthink Personal publishes its own services in the *Services* menu.

DEVONTHINK PERSONAL SERVICES

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

- **Add to DEVONthink:** Adds selected files, bookmarks, or images to your database. This service is also available in the Finder's contextual manu.
- **Take Plain/Rich Note:** Adds selected text to the global inbox from any application that support services (!) as plain or rich text. Taking a rich text note also copies images and clickable links. If the source document is a web page or a news feed, DEVONthink Personal tries to capture the address of the page or feed as well. This only works with applications that support this

feature, such as Safari, DEVONagent Pro, or NetNewsWire.

- **Capture Web Archive:** Captures the web page displayed in the frontmost window of any WebKit-based browser (such as Safari or DEVONagent Pro) as a web archive to DEVONthink Personal's inbox. This menu item is only shown when available, e.g., when Safari is the active application.
- **Append Plain/Rich Note:** Adds selected text as plain or rich text to the last note taken using the DEVONthink Personal Services menu items.
- **Lookup:** Opens the Search window in DEVONthink Personal with the selected text copied as search term.
- **Summarize:** Creates a new note in DEVONthink Personal's inbox with a summary of the selected text. DEVONthink Personal uses all documents in the open database for determining what's important and what's 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. If possible, it copies the current selection to the Sorter's inbox.

> Note: After installing DEVONthink Personal you need to log out, then back in again for new services and their shortcuts to be recognized. If one or more DEVONthink Personal *Services* menu commands do not carry a shortcut, it may be because another application grabbed them. Mac OS X will assign the shortcut if no other application already uses the same key combination.

DOCK MENU

The *Dock menu* appears when you click *DEVONthink Personal's icon* in the *Dock* with the ^ key pressed, when you right-click it, or when you left-click it and hold the mouse button for one second or longer.

Use the Dock menu commands *Import* and *Index* to import or index files. Copy something to the Clipboard and use *New with Clipboard* to directly create a document with the Clipboard contents anywhere in your open databases. DEVONthink Personal will try to create a meaningful name for it. Finally, choose *Take Note* to open the *Take Note* panel.

SYNCHRONIZING

Synchronizing keeps multiple copies of a database updated so that all contain the most recent set of documents. It makes sure that you can use the synchronized databases on your office Mac, your home iMac, or your MacBook Air. It also can be used to distribute new documents or other changes among your team members. A future version of DEVONthink To Go, available later in 2013, will use the same technology to automatically receive all changes you make to your document collection.

You can synchronize your database either directly from one Mac to another or indirectly using a "sync store" on a server:

- Direct connection between two Macs
- Via Dropbox
- Via WebDAV
- Via any mountable volume, e.g., a file server or a USB stick

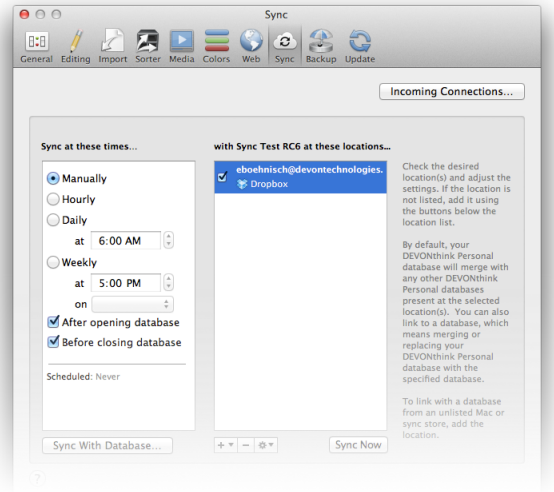
Synchronizing directly is much faster than using a sync store, but requires both machines to be connected to your local network, switched on, and have DEVONthink open at the same time. On the other hand, using sync store allows you to synchronize your database(s) at any time and, in the case of Dropbox, WebDAV, or a file server available over the Internet, from anywhere in the world.

IMPORTANT CONCEPTS

- **Synchronizing:** The process of updating two databases, or one database and a sync store, so that both copies of the database contain the most recent versions of your documents.
- **Location:** Another Mac or service capable to sychronize a database.

- **Sync store:** A folder containing one or more databases in a special syncable format; sync stores can reside on any mountable volume, e.g., a hard disk, a file server, or even a USB stick, or on services such as Dropbox or WebDAV.
- **Local sync store:** A sync store located on a local drive or file server.
- **Direct connection:** A direct link between two instances of DEVONthink, usually on two Macs. Synchronizing through direct connections does not require sync stores, but requires both devices to be switched on and running DEVONthink.
- **Importing a database:** Downloading a database from a sync store to this Mac.
- **Schedule:** A schedule that defines when a database should be synchronized with the locations assigned to it.
- **UUID:** Universally unique identifier; a unique ID that identifies a database even if it has a different name etc.

SETTING UP A DATABASE FOR SYNCHRONIZING



You set up at which times your database is synchronized, and with which locations in *Preferences, Sync tab.*

- **Step 1:** Choose when you want to sync your database automatically, or just leave *Manually* selected.
- **Step 2:** Check all locations to which you want to sync your database.
- **Step 3:** Click *Sync* to start the first synchronization.

If you haven't already set up the location, click the + button below the (empty) list of locations. From the pop-up menu that appears, choose the type of location and then follow the further instructions on the screen. *Add new local sync store* creates a new sync store on a mounted disk, *Add existing local sync store* lets you choose an already existing sync store, e.g., from a USB stick that you from a colleague. For WebDAV locations, the the path is the folder within the WebDAV root directory where you want to keep the sync store. In most cases, this can be left blank.

Should your database (identified by its unique ID) already exist in the location, DEVONthink Personal will ask if you want to merge the two.

Synchronizing requires temporary disk space. Make sure to have adequate free space available, especially when importing a database.

> Note: If you are using Dropbox and the Dropbox app, it is advisable to exclude the Apps folder or at least the *.dtSyncStore folders inside it from being synchronized with your Mac. This keeps the Dropbox app from wasting valuable disk space re-downloading all changes you've made to your databases, and from spamming you with notifications. To do this, click the Dropbox icon in your menubar, choose *Preferences*, switch to the *Advanced* tab, click *Change Settings*, and uncheck the *Apps* folder. To exclude only the sync stores, click *Switch to Advanced View*, select the *Apps* folder, and uncheck all folders inside it ending in ".dtSyncStore". Click *Update* to confirm your change. If you change your Dropbox email address, you'll need to remove and re-add the Dropbox location.

SETTING UP DIRECT CONNECTIONS

For the most part, direct connections are treated like other locations. The main difference is that for every connection one Mac serves as the host and the other Mac connects as a client. You can connect to the host from as many Macs as you like, e.g., to use the same research database in a team.

You set up your Mac as potential host or add direct connections as locations in *Preferences, Sync tab.*

- **Step 1:** On the host, click *Incoming Connections*.

- **Step 2:** Check *Allow other computers on the network to sync with my databases* to allow incoming connections from other computers.
- **Step 3:** If necessary, change the port number on which your Mac is listening for incoming connections. The default port is 10191, but you can change it to whatever works on your network.
- **Step 4:** On the client, click the + button below the list of locations and add a new direct connection.
- **Step 5:** Choose the host in the list (requires Bonjour to be available on the network) or enter its IP address or host name. Click *UK* to add it. You will need to enter the PIN shown in the host on the client side in order to permanently pair the two instances.
- **Step 6:** Done. You can now proceed, e.g., import the desired database from the host (see below).

IMPORTING A DATABASE FROM A SYNC STORE

If you synchronized a database with a sync store and want to make it available on another Mac, the easiest way is to directly get it from the sync store. If the database is hosted on another Mac to which you have added a direct connection, you also can import it from there.

- **Step 1:** Set up the location containing your database.
- **Step 2:** Click the button *Sync with Database*.
- **Step 3:** Select a location.
- **Step 4:** Select the database to import; DEVONthink Personal only shows databases not yet available on this Mac.

After downloading, DEVONthink Personal will ask you where you want to save the database and open the database. An imported database is automatically also set up for synchronizing with the location it came from.

SYNCHRONIZING WITH DEVONTHINK TO GO 1.X

> Note: DEVONthink To Go 2, planned for release in 2013, will use the sync mechanism described above. Version 1.x, however, uses its own proprietary sync mechanism. The information below will become obsolete with the release of version 2.

DEVONthink Personal has the ability to synchronize its database with DEVONthink To Go, its companion app for iPhone, iPad, and iPod touch devices.

Synchronizing with the device: DEVONthink Personal uses a special group named *Sync* to let you decide what data you want to share with your iOS device. The *Sync* group appears on the top group level of your database and has a special icon that makes it stand out from 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 by dragging them with the ⌘ and ⌥ keys held. You can add documents as well as whole groups to the *Sync* group. Smart groups are not yet supported, and will be ignored during synchronization.

Make sure your device is on the same WiFi network as this computer. Open the DEVONthink To Go app on the device, tap the sync button on the app's home screen, and follow the instructions.

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.

TROUBLESHOOTING

If you have problems synchronizing DEVONthink Personal databases between Macs click here. If you have problems synchronizing with DEVONthink To Go 1.x click here.

If you experience other problems not covered in this documentation, please visit our online forum or contact our support team.

BOOKMARKLETS

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

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

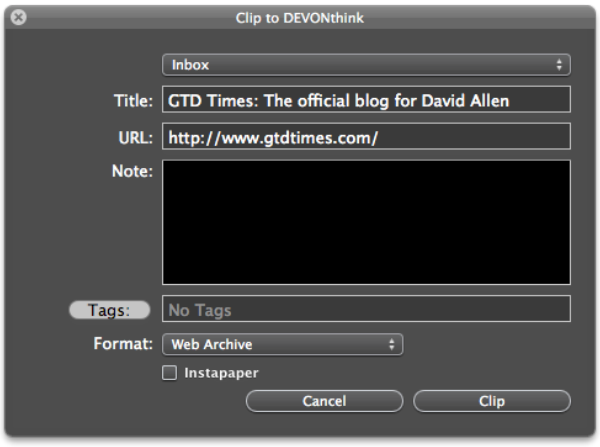
In addition, the functionality provided by the *Clip to DEVONthink* bookmarklet is also available as an extension for Safari 5, Firefox, and Google Chrome.

INSTALLATION

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

USING BOOKMARKLETS

Launch the web browser you have placed bookmarklets into. Next, load any page that you wish to archive or clip text from. When the page is shown, select the appropriate bookmarklet 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 adds 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 perhaps the best choice as it uses a special panel in DEVONthink Personal that lets you enter a title along with 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 plain or rich text file or, in the case of a bookmark, as a HTML document, web archive, or PDF that is placed into the *comments* field of the created document.

The *Clip to DEVONthink* panel checks if the web page address (URL) you're going to add already exists in your open databases. If it does it shows a little DEVONthink Personal icon next to the destination popup menu. Clicking the icon reveals the first found item with this URL.

DASHBOARD WIDGET

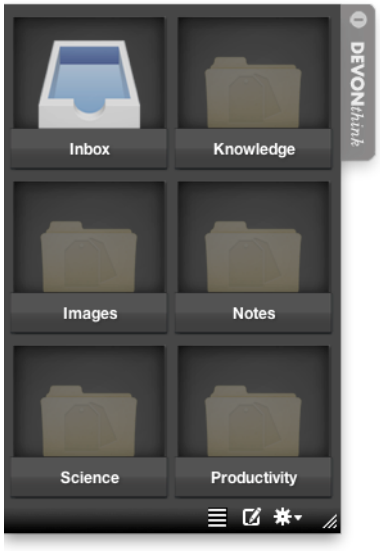
DEVONthink Jot allows you to take notes and send these to DEVONthink Personal's default destination right from the Dashboard.

The front of the widget is where you can type your note's message. Click into the writing area to make the insertion caret appear. Enter any tags below the note taking area. Click the *Take Note* button to save the note to your database.

You can also flip the widget front to back 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 saved and will be used whenever you open the widget again. Click *Done* to flip the widget back to the front view.

SORTER

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



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

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

POSITIONING THE PANEL

To position the Sorter panel, drag the tab to any position along the left, bottom, or right borders of your desktop or laptop screen, except for the border where the Dock is located (even when it is hidden). To open the panel, click the tab; to close it, click the tab again. Resize the Sorter panel using the resize gadget in the lower left or lower right corner. (Note: The location of the resize gadget depends on whether the Sorter is attached to the left or right side of the screen.) The size of the boxes stays the same, but enlarging or reducing the panel size adds or hides boxes.

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 desired database and drag the group 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 Sorter box, and its tool tip (which 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 Personal or to remove the connection. Double-click a box to open the connected box in DEVONthink Personal.

USING THE PANEL

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

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 Personal (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 Personal, 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 a database is open, the Sorter files the contents of the box automatically and plays a sound to notify you.

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

ADDING NOTES

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

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

ACTION MENU

The *Action menu* located at the bottom of the Sorter panel offers some handy commands. Use the *Action menu* to open the Sorter's Preferences, flush all boxes (automatically opens DEVONthink Personal and all databases that are needed), or quit the Sorter. When the Sorter is closed, 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 in the same way as the Sorter's *Send To Inbox* command in the *Services menu.*

SHORTCUTS

- **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 preferences so 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 accidently 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.

CAPTURING PAPER

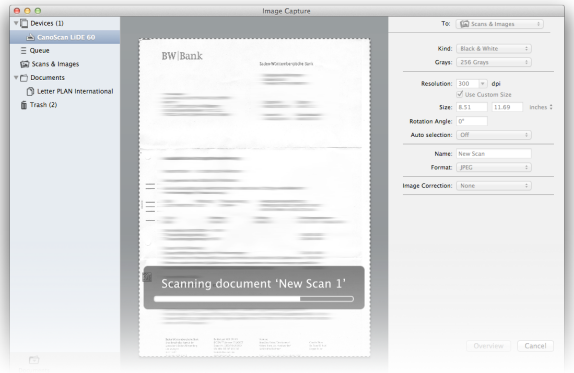
DEVONthink Personal comes with built-in support for Image Capture compliant scanners.

DEVONthink Personal 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 Personal's AI engine. For best results we recommend scanning at 150 dpi in color and with 100 percent quality.

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 botton according to a typical scan workflow: Scan, check the scanned pages, arrange the pages in 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. Note: iPhones, iPads, and iPods are treated like cameras. The main pane shows the standard capture interface that Apple Image Capture uses.

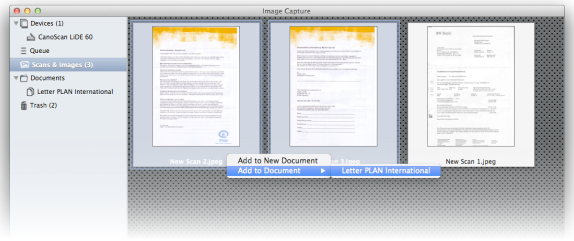
Choose the scan destination in the *To* pop-up menu. Either send the scan directly to any of your databases, add them as single files to the *Scans & Images* section, or choose any document that you have created in the *Document* section.

Scanners: DEVONthink Personal generates an overview scan of the current page in the scanner, and 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 Personal 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 Personal 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 Personal disables the *To* menu.

SCANS & IMAGES



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

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 window, 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 an image or PDF document. For PDFs you can also set the author and subject 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 if desired and set the document properties by

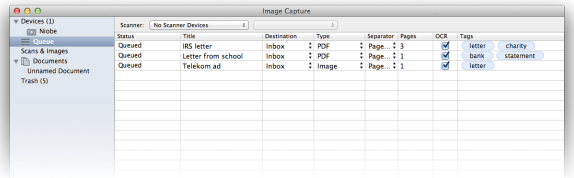
clicking the *Properties* button. This is similar to single scans in the *Scans & Images* section. Use the *Sort* to reverse the sort order or shuffle pages, e.g., when scanning all front pages first, then the back pages.

> 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 rearrange them by dragging. Edit the fields to set a title or tags, or to change the document type or destination.

To scan a batch of paper, set the *Separator* either to *Page Count* and the number of pages in the document or to *Blank Page* to begin a new document every time a blank page is encountered.

Before starting the batch run, adjust your scan settings by clicking the *Configure* button. Then click the *Start* button to start scanning. Finished steps are marked as "Sent". Click *Clear Sent* to remove them from the list.

MENUS

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

THE APPLICATION MENU

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

ABOUT DEVONTHINK PERSONAL, ...

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

> Note: When checking for updates no information is uploaded from your computer to the DEVONtechnologies server. DEVONthink Personal only downloads a file listing the most current versions to your Mac. This option is not available if you have purchased DEVONthink Personal from the Mac App Store. In this case, all updates are handled by the App Store.

INSTALL ADD-ONS

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

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

The following options are available:

- **DEVONthink Jot Widget:** Installs the DEVONthink Jot dashboard widget.
- **Safari 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 and follow Google's rules.
- **Firefox Extension:** Similar to the Safari 5 extension, but for Firefox.
- **PDF Services:** Adds an alias of DEVONthink Personal to the "PDF Services" folder so that you can "print" directly from any application to your database. See also p. 73ff
- **DEVONthink Sorter Helper:** A helper application that launches the Sorter when you log in.

Check your options and click the *Install* button to make DEVONthink Personal install or reinstall the necessary files and scripts into their repsective locations. If necessary, this command also launches the AppleScript Utility 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 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 your computer's file system trash.
- **Empty Cache:** Empties the web browser cache. This frees up space and makes sure that all, when displaying a web page, all data is freshly loaded instead of using a cached copy.

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

PURCHASE, ...

- **Check Upgrade Options:** Opens a web page that lists the upgrade options available for your copy of DEVONthink Personal.
- **Purchase License:** Opens the DEVONtechnologies Online Shop and puts DEVONthink Personal into your shopping cart. If this copy of DEVONthink Personal is already licensed, you will be presented with the choice of buying an upgrade for your existing license or buying another full license.
- **Enter License:** Use this command to enter your licence code. Make sure you enter ALL the details EXACTLY as they appear in the licence code e-mail. It is best to use copy-and-paste for transferring name, organization, and licence code from the email message to the appropriate fields. Note: Make sure that when you highlight the information to copy and paste, no spaces before or after the information are highlighted.

> 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). Available options depend on whether you have purchased your copy in DEVONtechnologies' online shop or from the Mac App Store.

SERVICES

- The *Services* sub-menu gives your access to special commands published by other Mac OS X applications such as TextEdit or Safari, or by services extensions such as our own WordService or CalcService. Also, DEVONthink Personal publishes its own services. See also p. 41ff

THE FILE MENU

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

NEW WINDOW

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

IMPORT

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

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

- **Bookmarks:** Imports bookmarks from Camino, Firefox, Google Chrome, OmniWeb, or Safari as bookmarks. Only new bookmarks are imported if you use this command again.
- **From Scanner or Camera:** Imports printed documents from a connected scanner or camera. See also p. 27ff

EXPORT

This sub-menu allows you to export selected documents or groups to the file system.

Files and Folders: Exports the selected documents and recreates the hierarchy you have built in DEVONthink Personal almost exactly. Metadata files (".DEVONtech_storage") make sure that no metadata such as comments, URLs, etc., are lost. DEVONthink Personal reads these files when importing and recreates your original data structure. If you don't need the metadata, you can safely delete the ".DEVONtech_storage" files.

Document: Exports the currently viewed document.

In addition, the *Export* sub-menu provides export methods based on plug-ins. DEVONthink Personal comes with a number of standard plug-ins for exporting documents in different formats. Currently the following plug-ins are included:

- **as Text:** Exports the selected items as one large plain text file. You can choose the desired encoding.
- **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 with embedded images, etc.
- **as Word Document:** Exports the selected items as one large Microsoft Word file.
- **as Website:** Exports the selected items as standalone web site that you can upload to your web server and share with colleagues. In the appearing dialog window, choose the desired template, text encoding, and whether DEVONthink Personal should convert diacritics and accented characters to HTML entities or not. File types that cannot be displayed in a web browser, e.g., iWork Pages files, are converted to PDF if possible. For the export, templates that you can modify yourself are used. See also p. 97ff
- **as Template:** Saves the selected document as a template, which can then be used to quickly create new documents using *Data > New > With Template.* To remove a saved template or to organize your templates in sub-folders, visit the folder '~/Library/Application Support/DEVONthink 2/Templates.noindex' in the Finder, then create sub-folders, move items, rename them, or trash them.
- **Database Archive:** Creates a clean copy of the frontmost database and compresses it as a .Zip archive. Back up the copy to any medium or server to keep your data safe from hardware or software failures.

INDEX, UPDATE INDEXED ITEMS

Index: Adds selected files to your database, but only as references, not in their entirety. DEVONthink Personal indexes the contents of the file and uses this for classification and other content-related functions. Indexed items show a little arrow after their name. For unknown file types, this command creates a bookmark. You can also drag files from the Finder to DEVONthink Personal; hold down the ⌘ and ⌥ keys to index them. This is similar to creating an alias in the Finder. Indexed groups are excluded from tagging by default and changes to an indexed document are immediately reflexted 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 to prevent users from accidentally harming 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 the changes to the files' counterparts in the database. Finally, this command removes indexed items that have lost their external counterpart. It does not affect items moved manually to the group. Use *Update Indexed Items* to keep indexed groups and their originating folders in sync or to manually update an item that you have changed directly inside the database package when DEVONthink Personal was not running.

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

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

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

SYNCHRONIZE

Synchronize: Synchronizes the selected database with all designated locations. If the database is not yet set up for synchronization this command opens the *Preferences, Sync tab.*

PROPERTIES

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

PAGE SETUP, PRINT

Page Setup: Sets your preferred page size.

Print: Prints the selected or front-most document.

THE EDIT MENU

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

UNDO AND REDO

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

CUT

Cut/Copy/Paste: Do exactly what their names say.

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

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

Paste and Match Style: Pastes text from the Clipboard into rich text documents, disregarding all styles from the clipped text, and matching styles in the current 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 frontmost document.

DOCUMENT EDITING

Tags: Shows the *Tags* bar, if necessary, so that you can enter your tags immediately.

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

PAGE EDITING

Insert Blank Page: Inserts a blank page into the PDF at the position selected in the sidebar.

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

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

SUMMARIZE

Summarize: Summarizes the selected piece of text. Unlike Mac OS X's Summarize service, this command takes advantage of the built-in AI of

DEVONthink Personal, and uses the complete "knowledge" contained in the open databases for improving the results. The better your databases, the better the results.

FIND

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

- **In Database:** Brings the search field of the frontmost window into focus.
- **Find:** Opens the standard panel for finding text within a document.
- **Find Next/Previous:** Jumps to the next, or previous occurence, of the last search term.
- **Use Selection for Find:** Copies the selected piece of text to the 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 text for spelling or grammar errors. 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: Shows 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 analyze shown text and make context-sensitive actions available, e.g., when you hover 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 change selected text to all lowercase or 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. Note: 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, labeling, classifying or group new documents, and more.

NEW

New: Allows you to create new documents directly from within DEVONthink Personal.

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

contents are updated every time you display the smart group's contents.

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

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

Some of the pre-defined templates are "smart templates" or "template packages". They consist of folders containing files for every supported language. These take care of choosing the right template variant for your language, adds the template 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, and even access your Address Book to fill in your personal details from your card. See also p. 95ff

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 selected from the sub-menu. You can edit the document in the external application, DEVONthink Personal automatically synchronizes the file when it is being saved to disk by the other application. If you have quit DEVONthink Personal in the meantime, use *File & Synchronize* on the document to update it. Choose *Other* to open the documents with an application not listed.

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 frontmost 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 frontmost 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: Use these commands to save the frontmost document, all documents, or to restore the frontmost document to the last saved version.

LABEL AND MARK

Label: 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: 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. 87ff

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. (Definition: Aliases are little files containing a link to the original file). When you replicate a group or document in DEVONthink Personal, you end up with two replicants, not one alias and one original. Both items have the same name and are shown in red.

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

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

GROUP

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

See Also & Classify: Opens or closes the *See Also & Classify drawer* of a main window.

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

> Note: If the document you are auto-classifying has replicants, these are deleted and only the original document is placed into the new location. 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 the commands and options dealing with all aspects of text formatting. Here you'll find the standard font, alignment, and ruler commands, as well as very special DEVONthink Personal commands.

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

FONT

Font: This sub-menu is reponsible for controlling the font and 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.

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

Style: 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 desired.

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 just as you would using 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 bulleted list. Select your prefix, bullet style, and suffix in the dialog sheet and click *OK* to insert your list skeleton. In the list, press ↩ to insert new items, and press ⇥ and ⇧⇥ to indent/de-indent items, just as you would 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 widths, and colors. Also, you can merge and split cells and create tables within a cell.

MAKE LINK

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

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

- If the text was a valid URL, the URL will be the target of the link. Editing the link text later does not change the target. Use the *Edit Link* command of the contextual menu to edit the link target.
- Otherwise, DEVONthink Personal treats the link as a Wiki-style link. Clicking the Wiki-style link jumps to a document with exactly the same name as the linked text (or any document with a Wiki alias of that name). If there is no document of that name, clicking the link creates a new rich text document named after the linked text and pre-filled by 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, while 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 Hypenation: Enables or disables hyphenation for the current rich text document.

THE VIEW MENU

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

VIEWS

Using these commands, you switch between different layouts for main windows:

- List
- Icons
- Columns
- Split
- Three Panes
- Tags

VIEW OPTIONS

Cover Flow: When checked, DEVONthink Personal displays the contents of selected groups in Cover Flow style in the view/edit pane in the Split and Three Panes views. Use it to quickly browse through multiple documents. You can double-click the frontmost 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: Shows 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 Details: Switches between displaying icons only or displaying icons together with detailed information such as kind, label, size, word count, creation date, and modification date. Available in all windows using icon or column views.

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. You also can sort items manually, *Unsorted*, and choose to ignore umlauted characters when sorting elements. DEVONthink Personal remembers sort settings for every group separately and uses those settings 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 need.

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

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

EXPAND AND COLLAPSE

Expands and collapses 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 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 Page, Two Pages:** Shows a multi-page document as single pages or two pages facing each other (as in a magazine).
- **Continuous Scroll:** When checked, shows the pages of the PDF as one long scroll. 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 frontmost window.

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

THE GO MENU

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

TOP GROUP, ...

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

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. This is useful when you have opened a document in a separate window and want to move to another document in the same group. It also works in Search windows.

INSTANCES, HIGHLIGHTS

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

Previous/Next Highlight: Navigates backwards and forward through all highlighted passages within a document, regardless of whether these passages have been highlighted by a search or by 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 ideal if you are working with the same set of windows over and over again. Save these windows 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. It also contains commands for keeping your database healthy and for showing the Info and the Groups panel.

SEARCH TOOLS

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

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

PANELS

Show Info: Opens the Info panel , which shows basic information about selected items. Since it is a panel, selecting a new item updates the Info panel accordingly.

Show Properties: Opens the document properties panel. View or edit the properties such as author, subject, or keywords in the frontmost panel.

Show Groups: Opens the Groups panel. Use this panel to always have your group list handy, which makes dragging text clippings or documents from DEVONthink Personal or other applications to a group very convenient.

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 searching for documents by age.

DATABASE TOOLS

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

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

Backup & Optimize: Creates an internal backup of the database and then optimizes the database structure. Optimizing removes unnecessary internal elements from the database and rebuilds the

internal structure to optimize the performance. DEVONthink Personal also creates internal backups on a regular basis depending on the settings in the Preferences, Backup tab. Internal backups only back up the index structures in case the index gets corrupted. Please use an external backup software to create backups of your complete database including all documents.

Restore Backup: Restores 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 becomes a backup. You'll never lose any data by using this command.

Rebuild Database: Completely rebuilds 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. Note: Tabbed browsing needs to be enabled for these commands to work.

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

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

LOG PANEL

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

ACTIVITY PANEL

Activity: Opens the *Activity* panel. It shows all running processes and allows you to manually stop them.

THE SERVICES MENU

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

See also p. 21ff

THE HELP MENU

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

DEVONTHINK PERSONAL HELP

These commands open the integrated help pages that are equal to the document you're 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 Personal* assistant where you can 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 purchased DEVONthink Personal from 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 Personal* assistant. The tutorials help get you started by explaining everyday DEVONthink Personal tasks in step-by-step detail. 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 Personal's icon* in the *Dock* with the ^ key pressed, when you right-click it, or when you left-click it and hold the mouse button for one second or longer.

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

For all Mac OS X applications, the *Dock menu* provides a selection of the commands of the application menu.

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

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

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

WINDOWS & PANELS

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DEVONthink Personal uses a number of windows to present information. These windows are used for displaying and manipulating groups and documents, finding information, editing metadata, analyzing text, and changing the properties of your database.

MAIN WINDOW

Most of your time working with DEVONthink Personal will be spent in a main window. Main windows give you access to your groups and documents, while also allowing you to view and edit files.

Open a new main window with *File > New Window.* DEVONthink Personal also opens a new window when you open a database; you can set this option 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. Click-and-drag the icon to move it to another group or database 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 however you prefer:

- **List:** Displays groups and documents as a list; groups can be expanded/collapsed by clicking the gray triangle in front of their name. Double-clicking items opens them in separate windows.
- **Icons:** Displays groups and documents as icons. Double-clicking items opens them in separate windows. For images, DEVONthink Personal displays a live thumbnail. Adjust the size of the icons using the slider located in 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 along 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. You can double-click the column resizer to make it fit automatically, and each column can be sorted individually.
- **Split:** Splits the window into an item list and a view/edit pane. To switch between a vertical and horizontal split, use *View > Widescreen.* The item lists all groups and documents in the database, and may 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 at 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 on the toolbar, you can see 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 represending the tag or in the global inbox, and are tagged with the selected tag. See also p. 91ff

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

ITEMS

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

Press the ⌘ and ⌥ keys to link to the dragged item(s) instead of importing them to the database. 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 their native application (depending on the document type). For smart groups, double-clicking them in any view except *Icons* view opens the *Smart Group Editor* . 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, its read/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. 35ff
- Icons of feeds or other unread items show an "unread" indicator in the *State* column. See also p. 59ff
- Smart groups using dates are shown with a clock icon; smart groups using the "unread" status are marked with a unique icon, too.
- Regular groups are shown in blue, while 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 imported. See also p. 90ff

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 ⌘ key as you click if you want 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.
- **Three Panes View:** Select a group or sub-group, then select the document you want to view or edit. DEVONthink Personal shows the group or sub-groups content in the view/edit pane. Click the triangle in front of a group to expand it. When you select multiple groups or news feeds, the upper right pane shows all documents in all selected groups in one list, just 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, if possible, allows you to edit it. 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 this pane.

INFO BAR

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

Use the slider located on the right side of the info bar to adjust the size of icons.

TOOLBAR & SHORTCUTS

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

Please find a list of shortcuts in the appendix. See also p. 90ff

- **Navigation:** Navigates to the top level of the database, or one level up. Useful when you have opened a second main window by double-clicking a group, and now want to move up the groups hierarchy in this window.
- **Go To Document:** Selects the first/previous/next/last document. Only available in Three Panes view or in separate document windows.
- **View:** Switches between the possible views. See above.

- **Actions:** Provides commands for modifying the selected documents, similar to the *Action* menu in other views. Generally, the *Action* menu contains a selection of the commands also available via the contextual menu.
- **Quick Look:** Opens the standard Quick Look panel for the selected items.

- **Group +:** Creates an empty group.
- **Smart Group +:** Creates a new smart group.
- **Plain/Rich Text +:** Creates a blank plain or rich text document.
- **Link +:** Creates a new link document.

- **Mark Up:** Highlights, underlines or strikes through selected text. This option is available for rich text documents, editable PDFs, and web archive.
- **Highlight:** Highlights the selected piece of text with the 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, e.g., 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:** Imports new documents; 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. 32ff
- **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. Upgroup 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 Personal begin to search as you type. The last word of the term is treated like a prefix ('word*'). Add more characters to refine and to speed up the search and press *Enter* or ↩ to finish the search, or to search for whole words only. See also p. 49ff
- **Find:** Opens the Search window.

- **Bigger, Smaller Font:** Increases or decreases the font size.
- **Subscript, Superscript:** Makes selected text subscipt 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 points to that URL.
- **Edit Source, Show Page:** Toggles between source and page display of selected HTML documents.

- **Zoom:** Zooms in, out, or 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.*
- **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, Microsoft Outlook, 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.
- **Take Note:** Lets you take a quick note.

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

CONTEXTUAL MENU

The contextual menu (which appears when you right-click or ^ click an item) offers a range of commands tailored to what you wish do with the clicked object.

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

- **New Window:** Opens a new main window.
- **Open Database:** Opens the selected database.
- **Close Database:** Closes the selected database.
- **Delete Database:** Closes the selected databases, and moves it to the Finder's trash.
- **Empty Trash:** Empties the trash can.
- **Database Properties:** Shows the *Database Properties* of the selected database.
- **Add to Favorites:** Adds the selected item to the favorites.
- **Remove from Favorites:** Removes the selected item from the favorites.
- **New Smart Group:** Creates a new smart group in the sidebar.
- **Edit:** Opens the smart group editor (only available for smart groups).
- **Delete Smart Group:** Removes the selected smart group from the sidebar.
- **New:** Creates a new document.
- **Open:** Opens a selected document(s) in a new window.
- **Open in Tabs:** Opens a selected document(s) in a new tab.
- **Open With:** Opens a selected document(s) 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 refering the selected item to the clipboard. Paste this URL into any third-party application to directly reference an item in your DEVONthink Personal database.
- **Show in Finder:** Reveals the item's file in the Finder.
- **Get Info:** Opens the *Info* panel for the items.
- **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 items added to an indexed group from the database to the connected folder in the filesystem. Only available for items in an indexed group.
- **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/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.
- **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, Microsoft Outlook, 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 to save the search as a smart group for convenient access.

> Note: For your convenience, DEVONthink Personal also makes the *Services menu,* available via the contextual menu.

DOCUMENT WINDOW

A document window is 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 sets of tools. Most of them are identical to their counterparts in the DEVONthink Personal main window toolbar.

See the Documents chapter for a detailed description of the various document types.

SEARCH WINDOW

Search windows allow you to search your database in various ways, and assist you with intelligent functions for broadening and adjusting your search terms.

SEARCH TERM

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

DEVONthink Personal uses Boolean operators, parenthesis, and quotes to allow complexly 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 term, 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 term you've entered will be shown on the top of the list, so you won't lose it for your search run. This function uses all open databases for retrieving similar words.

SEARCH OPTIONS

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

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

- **All:** Searches all elements of a document.
- **Content:** Searches the content of a document.
- **Name:** Searches the name of a document.
- **URL:** Searches the URL field of a document.
- **Comment:** Searches the Comment field of a document.
- **Metadata:** Searches the metadata associated with a document.

Comparison: Make DEVONthink Personal treat regular letters and their counterparts with umlauts or diacritics equally. Check *Fuzzy* to make searches fuzzy (e.g., "Hello" and "Hullo" would both be found). Note: This option is only applied to words, 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 for tags, date ranges or similar limiters. The *Reset* buttons clears the set advanced criteria. See also p. 65ff

SEARCH RESULTS

After a successful search run, DEVONthink Personal lists all found documents below the search term field, and displays them in a list together with their relevance score, icon, location in the database,

modification date, document kind, and size. Sort the list by clicking the column titles; click them again to reverse the sorting order. Modify the columns using the contextual menu or *View > Columns.* Point the cursor to a result and the appearing tooltip will show you the full title, location, and other metadata; click a document title once to rename the document.

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

See also/Classify drawers are supported, too.

Due to limitations in Mac OS X's PDFKit, highlighting of occurences of the search term in the document is not tied to words; thus, DEVONthink Personal also highlights sub-strings.

SMART GROUPS

When you are satisfied with the search results, you can save the query 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 a specific database is created in the top level of the database.

TOOLBAR & SHORTCUTS

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

- **Go:** Selects the first/previous/next/last item.
- **Actions:** Provides commands for modifying the selected documents, similar to the action menu in other views. Generally, the action menu contains a selection of the commands also available via the contextual menu.
- **Open:** Opens the selected document(s) in separate document windows.
- **Open Externally:** Opens the selected documents in an external application.
- **Launch URL:** Opens the Internet location stored in the URL field of the selected documents, such as a web site URL in Safari.
- **Copy URL:** Copies the Internet location stored in the URL field of the selected document to the clipboard.
- **Group:** Groups the selected documents in a new group.
- **Delete:** Moves the selected documents to the trash.
- **Export:** Exports the selected documents.
- **Info:** Opens the Info panel.
- **Print:** Prints the selected documents.
- **Zoom:** Zooms in, out, 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.

Please find a list of shortcuts in the appendix. See also p. 90ff

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:** Shows and selects 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, Microsoft Outlook, 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 accidently modified. Locked documents or groups are marked with a padlock.

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 anything else that can be reached by a URL. This field is used primarily by bookmarks, but you can also use it to connect a document to a web page.

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

INFORMATION ELEMENTS

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

Kind: Shows the selected document type (for example text, RTF, etc.)

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

Created, Modified: Shows the (editable) 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. Information 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 option to exclude such things as temporary groups from classification to increase the accuracy of the built-in artificial intelligence.

Label: Shows the label assigned to this item and lets you change it.

Tags: Shows the tags assigned to this item. You can also edit tags here. See also p. 91ff

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

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

Spotlight Comments: Stores other information you want to attach to your document or group (similar to the Spotlight comments field in the

Finder). Of course, the *Comments* field is searchable. DEVONthink Personal synchronizes the Spotlight comments in the Finder with this field in the database. If this application was purchased in the App Store, only importing Spotlight comments is possible.

> Note: You can modify the comments of multiple selected items simultaneously, 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 is not limited to:

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

Depending on the document type, you can edit or view these properties. More fields may be available depending on the document type.

HISTORY

The History panel, opened using *Tools > History,* lists all documents in your database, without the groups hiearchy (by default sorted by modification date which reflects content modifications only but not name or metadata changes).

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

Of course, you can use drag-and-drop to move documents to other windows or to the Finder, and modify the documents using the commands in the *Data* menu or 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 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 from the Tools menu, allows you to quickly enter a note, choose the destination, and add tags and a URL to the note. If DEVONthink Personal can get the URL of the frontmost application, e.g., from Safari, it will also insert that information automatically into the URL field.

Check *Rich Text* to take a rich text note. Use the *Format* menu to style your note.

Change the hot key for opening the *Take Note* panel in the Sorter preferences.

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

LOG

The *Log* panel displays warnings and error messages that occur, when importing files and folders and performing other actions. The panel 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 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 ^ 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,* ⌘C, or the contextual menu.

ACTIVITY

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

PREFERENCES

The Preferences window, opened using *DEVONthink Personal > Preferences,* contains all available options, which you can modify to adapt DEVONthink Personal to your personal needs.

Because the preferences are so important, we have created a separate chapter for them.

DATABASE PROPERTIES

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

LOCATION

This section of the properties panel shows the location of the database package and any additional options:

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

Create Spotlight Index: Check to make this database available to Spotlight. Checking this option lets DEVONthink Personal create a folder in "~/Library/Cache/Metadata" that Spotlight uses for accessing the documents in the database. If you ever feel that this folder is out-of-sync with the database, click *Rebuild* to recreate this folder from scratch.

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

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

> Note: Rebuilding the Spotlight index can become necessary after copying a database from one computer to another.

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

STATISTICS

This section displays some basic statistics about how many documents your database contains, file sizes, etc.

NAME AND COMMENTS

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

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

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

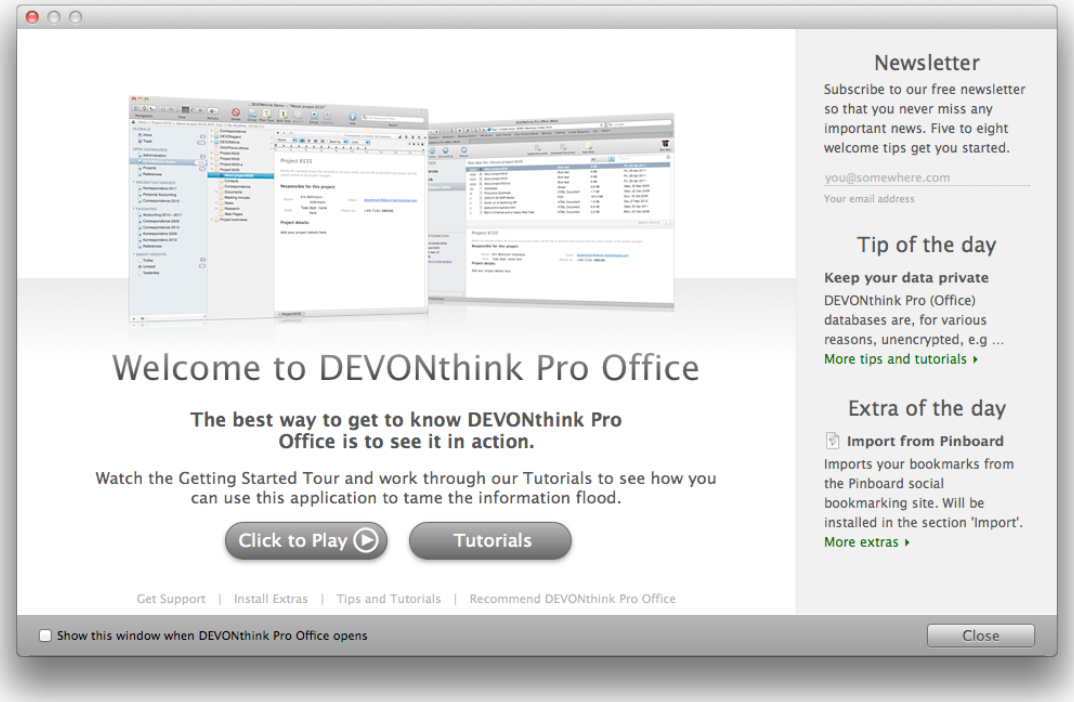
PROTECTION

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

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

ASSISTANT

The integrated *Assistant* combines a welcome screen with tips, web and video tutorials, installable extras, and a suppport page that guides you through the available support options. Click here to open the Support Assistant.



WELCOME

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

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

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

GET SUPPORT

The support screen guides you through the three common steps for troubleshooting DEVONthink Personal. In addition, you can have your license code resent in case you don't have it anymore, request a trial extension, update your details in DEVONtechnologies' customer database, or buy an upgrade or a second license.

TIPS AND TUTORIALS

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

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

INSTALL EXTRAS

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

- Scripts
- Templates
- Plugins

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

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

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

DOCUMENTS

In this chapter:

General	57
Plain and rich texts	58
HTML pages, web pages, feeds	59
Images and movies	61
PDFs	62
Office documents, email, and others	63

All documents are displayed in DEVONthink Personal in views. Each view features its own tools, contextual menu commands, and hidden keyboard shortcuts. In this chapter, we will look at many of those features.

GENERAL

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

Currently, DEVONthink Personal features the following view types:

- Plain and RichText
- Office and other documents
- HTML pages, Web pages, Feeds
- Images
- PDFs

NAVIGATION BAR

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

- Navigates back to the last visited document after following a link.
- Navigates back to 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 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 for selecting text in items that are displayed using Quick Look or to view or edit the source code of an HTML document. In preview mode DEVONthink Personal uses Quick Look to show Pages documents and other filetypes 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. 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 jump directly 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. 91ff

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

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

TOOLBAR & SHORTCUTS

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

Please find a list of shortcuts in the appendix. See also p. 91ff

PLAIN AND RICH TEXTS

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

THE RULER

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

The ruler contains the following elements:

- **Tab Stops:** Place tab stops with the mouse, then remove them by dragging them off 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 on the ruler. Use the mouse to adjust the left and right margins and indent.
- **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 occurences 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 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 values other than the ones shown.
- **Lists:** Make the current paragraph a list (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: The built-in "mini outliner" is an nice feature. 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. The mini outliner 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.

TOOLBAR & SHORTCUTS

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

Please find a list of shortcuts in the appendix. See also p. 91ff

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 to the Clipboard (only available for selected links).
- **Edit Link:** Edits the destination of a selected link.
- **Highlight >:** Highlights the selected piece of text with the color you select in the sub-menu.
- **Insert >:** Inserts special elements into the text (such as a page break, the current date or a bullet). Same as the *Insert* sub-menu of the *Edit menu.*
- **Insert Link To >:** Inserts a link to an item you select in the sub-menu (only available when no text is selected).
- **Look Up in Dictionary:** Looks the selected text up in Mac OS X's Dictionary.
- **Link To >:** Makes the selected piece of text a cross-link and links it directly to the group or document you select in the sub-menu.
- **Make Link:** Makes the selected piece of text a WikiLink. The destination of the WikiLink is a document with the same name as the selected text. If no document with that name exists, clicking the created link creates it using the template you have set in the Editing Preferences.
- **Open Link:** Opens the selected link in the default browser or application (only available for a selected link).
- **Open Link in New Tab:** Opens the selected link in a new tab.
- **Open Alias:** Follows a selected link (only available for a selected Wiki-style link resolved by an alias). Aliases are defined for each item separately in the Info panel.
- **Remove Link:** Makes a selected link simple text.
- **Search selected phrase:** Searches for the selected text as a phrase.
- **Set Title As:** Renames the document according to the selected piece of text (needs to be less than 256 characters).
- **Split Document:** Splits the document at the current insertion mark position.
- **Add tag [word]:** Tags the document with the selected word (only available if the word is not already a tag of the document).
- **See [word]:** Opens a drawer with documents related to the selected word.
- **See Related Text:** Opens a drawer with documents related to the selected text passage (only available when more than one word is selected).

HTML PAGES, WEB PAGES, FEEDS

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

DEVONthink Personal does not display news feeds. You can find news feeds support in DEVONthink Pro and higher.

HTML views support the *Edit > Find >* commands as well as the See Also & Classify drawer. To edit the source code of an HTML document, use the navgiation 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.

TOOLBAR & SHORTCUTS

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 configured individually. Naturally, the DEVONthink Personal offers only tools for HTML views that are useful in a web environment.

Please find a list of shortcuts in the appendix.. See also p. 91ff

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 a PDF to either the current group or to the inbox.
- **Capture Frame Address:** Adds the URL of the current frame to either the current group or to the inbox.
- **Capture Page Address:** Adds the URL of the current page to either the current group or to the inbox.
- **Copy Frame Address:** Copies the frame URL to the Clipboard.
- **Copy Image:** Copies the image to the Clipboard.
- **Copy Image Address:** Copies the URL of an image to the Clipboard.
- **Copy Page Address:** Copies the page URL to the Clipboard.
- **Open Image in PhotoStickies:** Opens the image in PhotoStickies.
- **Copy:** Copies selected text to the Clipboard.
- **Highlight:** Highlights the selection in a web archive. 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 to previously visited pages.

- **Capture Frame:** Captures the HTML code of the frame and saves it to either the current group or to the inbox.
- **Capture Image:** Captures the selected image and saves it to either the current group or to the inbox.
- **Capture Link:** Captures the link and saves it to either the current group or to the inbox.
- **Capture Note:** Captures selected text to either the current group or to the inbox.
- **Capture Page:** Captures the HTML code of the page to either the current group or to the inbox.
- **Capture Webarchive:** Captures the page as a web archive file (including all necessary images) for

offline viewing and archival to either the current group or to the inbox.
- **Update Webarchive:** Updates the contents of a web archive file with the live version on the Internet (only available in web archives).

For PDF pages, more options become available:

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

IMAGES AND MOVIES

DEVONthink Personal uses Mac OS X's core technologies to display images and movies; therefore, it 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, the panel offers a number of predefined image effects and lists available metadata contained in the image file itself.

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

TOOLBAR

For images and movies, DEVONthink Personal provides a set of tools that allows you to zoom the picture to whatever zoom factor you like, or to view the image in full screen mode. Use *Open Externally* to open the image in an external editor. Movies appear with the standard QuickTime controller.

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

CONTEXTUAL MENU

- **Play/Stop:** Starts playing the movie or stops playing it.
- **Undo/Redo:** Revokes the last action or redoes it.
- **Cut/Copy/Paste:** Cuts, copies or pastes the selected image or movie.
- **Copy Frame Link:** Copies a URL linking to the actual frame of the displayed movie.
- **Actual Size:** Zooms the image so that it appears at 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 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. The image is saved in the lossless TIFF format.

PDFS

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

SIDEBAR

The sidebar shows thumbnails of the pages within 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, e.g., copy and paste, are available, too.

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

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

ANNOTATING PDFS

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

- **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.

TOOLBAR & SHORTCUTS

- **Annotate:** Provides annotation tools. See also p. 62ff
- **Tool:** Selects the editing mode. See also p. 62ff
- **Delete Pages:** Deletes the selected pages of a PDF document.
- **OCR:** Converts the document to a searchable PDF.

Please find a list of shortcuts in the appendix. See also p. 91ff

CONTEXTUAL MENU

- **Actual Size:** Zooms the image so that it appears at 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/Two Pages:** Displays the PDF either as one page or as facing pages (like in a magazine).
- **Continuous Scoll:** When checked, DEVONthink Personal displays the pages of a mutli-page PDF like one long scroll. If unchecked, it displays the PDF page by page.
- **Previous/Next Page:** Jumps to the previous or next page.
- **Highlight:** Highlights the selection. Using this command on a selection again removes the highlighting.
- **Link To:** Marks the selected text as link and links it to the item chosen in the sub-menu. This saves you from having to create a link annotation first and then select the target in another step.
- **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:** Undo or redo the last action.
- **Cut/Copy/Paste:** Cuts, copies, or pastes a PDF page.
- **Copy Page Link:** Copies a URL that points directly to the selected page.
- **Split Document:** Splits the PDF at the selection into two documents.
- **Insert Blank Page:** Inserts a blank page into the PDF.
- **Delete Selected Page:** Deletes the selected page.
- **Rotate Left/Right:** Rotate a selected page left and right.
- **Select/Deselect All:** Selects or deselects all pages.
- **Copy Page Link:** Copies a URL to the clipboard, pointing not only to the document itself but the actual page.

OFFICE DOCUMENTS, EMAIL, AND OTHERS

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

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

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

For some document formats the preview allows you to select and copy text, for other formats it doesn't. If DEVONthink Personal is able to interpret and convert the document format, you can use the Text View/Preview button in the navigation bar to switch to a text view that allows you to select, copy, and drag text.

> Note: The availability and 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 diectly into the files, or write a preview plugin and add it to either the source application, or have you install it separately in ~/Library/QuickLook. If a document that you want to view in DEVONthink Personal does not show a QuickLook preview, please contact the maker of the source application and ask them to add QuickLook support.

TOOLBAR

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

Use *Data > Open* to open the document in a separate document window instead of in its source application.

DRAWERS & SHEETS

In this chapter:

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Smart group editor 65

DEVONthink Personal uses drawers to display the results of the Classify and See Also functions that help you file items and find relationships between items in the database. The Smart Group Editor, which appears in a sheet, 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 one (1) document in a main window and then click the *AI button* (a small sorcerer's hat) in the navigation bar at the top of the view/edit pane. This button is only available in views that have a view/edit pane.

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

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

When activated, DEVONthink Personal analyzes the contents of the selected document and compares it to all data stored in the database. From this "knowledge," DEVONthink Personal 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 which groups the selected document would fit into best. It also lists the location of the group and a graphical score that shows how sure DEVONthink Personal is about the suggested placement. The tooltip for any entry in the list shows the full title and location for it. This part is only visible when the *sorcerer's hat button* is used.

To move the document to one of the suggested groups, select the group and click *Move To*. Alternatively double-click the group. For your convenience, DEVONthink Personal preselects a single group, or multiple groups if it is unsure. Drag the file into any item list to move it, e.g., into a main window. Use the ⇧ and ⌘ keys to select more than one target. This generates replicants.

> Note: Any replicants of the document being moved 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 old replicants.

SEE ALSO

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

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

CONTEXTUAL MENU

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

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

SMART GROUP EDITOR

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

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

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

The list of predicates consists of a list of blocks, each 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"), and 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. 97ff

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

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

PREDEFINED SMART GROUPS

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

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

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

PREFERENCES

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The Preferences window, which you open by selecting Preferences in the *application menu,* is the place to go to change global settings for DEVONthink Personal. In addition to global settings, databases also have separate 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. Number will appear 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 marked in blue and underlined in item lists.
- **Mark duplicates and replicants in color:** Check to highlight duplicates marked in blue and replicants marked 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, labels are displayed in the Finder's style.

INTERFACE

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

- **Hide 'Groups & Tags' panel when inactive:** Check to hide the Groups panel in applications other than DEVONthink Personal.
- **Open contents after using 'New with Clipboard':** Check to let DEVONthink Personal switch to newly added items after adding them using *Data > New > With Clipboard* or via the *Dock menu.*
- **Always open groups in a new window:** When checked, double-click a group to open it in a separate window. When unchecked, double-click the group to make it 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, the actual view settings are maintained when you navigate the group structure instead of the group's individual settings being applied.
- **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, in the default application or in new windows.

STARTUP

Choose whether you would like DEVONthink Personal to open a fresh main window on startup, re-open all windows active when you quit DEVONthink Personal the last time, or do nothing.

If *Open all windows that were open on quit* is selected, DEVONthink Personal also opens all databases that were open on quit.

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

FONTS

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

EDITING

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

GENERAL

- **Display PDF attachments of rich texts:** Show the content of PDFs attached to RTF documents.
- **Check spelling while typing:** Spell check everything you write all the time.
- **Check grammar with spelling:** Check the grammar when checking the spelling.
- **Correct spelling automatically:** Correct misspelled words automatically.
- **Smart quotes:** Use curly quotes instead of simple English ones.
- **Smart copy/paste:** Insert or remove spaces before and after cut or pasted text.
- **Smart links:** Detect web addresses and turn them into clickable links automatically.
- **Smart dashes:** Convert characters, e.g., two hyphens into a proper dash.
- **Data detectors:** Detect dates, times or addresses in text, and show possible actions when the mouse cursor moves over them (Mac OS X 10.6 or later).
- **Text replacement:** Use the system-wide text replacements when editing text (Mac OS X 10.6 or later).

RULER UNITS AND FONTS

- **Ruler Units:** Select your personal preference for ruler units such as centimeters or inches, 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, 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 mode. 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 mode appears too wide 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 switching to the linked document.
- **Template:** Enter a template text here. This will be used to create a new document when you make text a link that does not point to an existing

document yet. You can use various placeholders to automatically insert text--the current date and time, for example.

SUMMARIZATION

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

IMPORT

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

FILES

These options define whether DEVONthink Personal imports files of a given type when you import folders using *File > Import* or via drag-and-drop.

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

TITLES

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

NEW NOTES

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

DESTINATION

Choose the default destination from which data is comingbookmarklets, 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 on top of all other windows. It does not bring DEVONthink Personal to the front. Use it to select the group where you want to file the items and add tags.
- **Global inbox:** The data is stored in the global inbox.

SORTER

The Sorter preference allows you to assign a hotkey for capturing a selection into the inbox of the Sorter, as well as a hotkey for taking a new note, showing the Sorter at login, and starting or quitting the Sorter manually. See also p. 25ff

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 is moved off 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 full screen applications that Sorter is tracking. Add other applications using the + button, and check or uncheck applications to hide Sorter when the application is going to full screen mode.

Reset the full screen settings to make DEVONthink Personal "forget" all remembered applications.

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

MEDIA

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

The following options are available:

- **Movies:** Check *Create thumbnails* if you want DEVONthink Personal to create thumbnails for imported or indexed QuickTime movies. Movie documents without thumbnails will appear with a generic icon, while movies with thumbnails show miniature views 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. You can also choose a background color for viewing movies.
- **Images:** Check *Create thumbnails* if you want DEVONthink Personal to create thumbnails for imported or indexed images. Check *Generate from actual image* to ignore thumbnails embedded into the image files and let DEVONthink Personal generate the thumbnails from the actual image. Choose a background for viewing images using the standard Mac OS X color chooser.
- **PDF & PostScript documents:** Check *Create thumbnails* if you want DEVONthink Personal to create thumbnails for imported or indexed PDF and PostScript files. Choose a background for viewing PDFs.
- **Create Thumbnails:** Check *Web Archives*, *Bookmarks*, or *Other files* if you want DEVONthink Personal to try to create thumbnails for these file types.

COLORS

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

WEB

The web preferences resembles the settings of most web browsers. Use these preferences to define how DEVONthink Personal's displays web documents and "live" web pages.

WEB CONTENT

These settings define how DEVONthink Personal treats special web contents:

- **Enable ...:** Check these options to use installed third-party plug-ins, (such as Flash or RealPlayer plug-ins), and to 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.) Check *Block zooming* to keep web sites from automatically zooming windows to full size. Check *Block advertisement* to block common inline advertisements provided by some search engines.
- **Zoom text only:** Check to zoom only the text and uncheck to use Safari 4-style zooming.

IMAGES

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

- **Display images when the page opens:** Check this option to diplay web pages with images. Just remember, if 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.

ACCEPT COOKIES

Cookies are little text files with information that web pages store on your computer use to recognize you as a returning customer, among other things. While most cookies are harmless, you may want to control what is being stored on your hard disk.

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

FONTS

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

STYLE SHEET

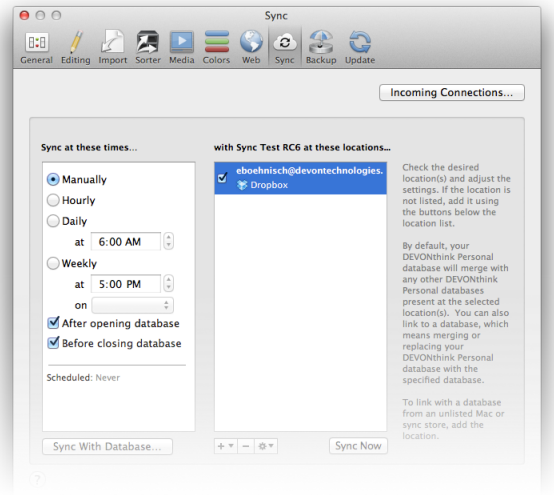
You can further control the way DEVONthink Personal displays web pages by applying a CSS style sheet that changes the rendering on the fly.

Click *Select* and choose your style sheet to apply it to DEVONthink Personal's integrated web browser. Note: This is for experts since 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.

SYNC



DEVONthink Personal allows you to keep multiple copies of your database on multiple Macs in sync. Use these options to define which locations are synced when. Click here to learn more about synchronization and how to set it up.

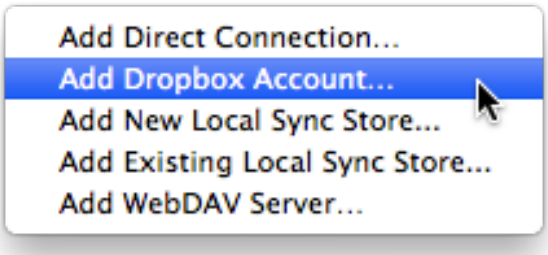
SCHEDULE

The first column at which times you want to synchronize your database. You can choose to synchronize it:

- Manually
- Hourly
- Daily
- Weekly
- After opening a database
- Before closing a database

For *Daily* also select the time, for *Weekly* the time and the day of the week, all *Weekdays* or the *Weekends*. Below the options, DEVONthink Personal shows you when the database will be next synchronized according to the chosen schedule.

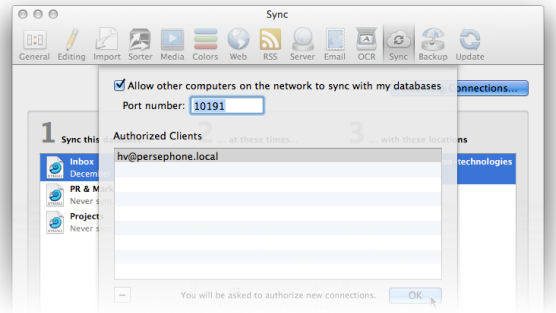
LOCATIONS



The second column lists all locations you have defined. Check all locations that you want to synchronize your database with. To add new locations, click the + button below the list and choose the desired location type from the pop-up menu. Remove a location by selecting it and clicking the - button. Use the gear button to modify an already added location. Click the *Sync* or *Sync Now* button to begin synchronizing the database.

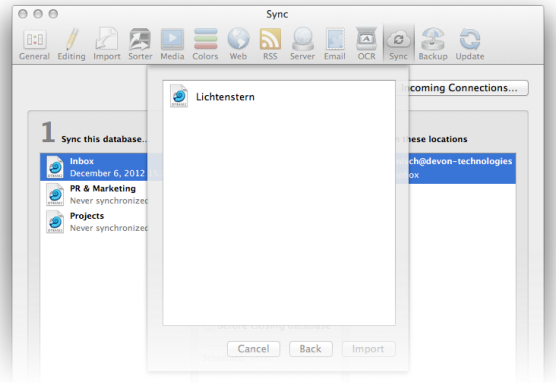
INCOMING CONNECTIONS

Click the button *Incoming Connections* to define whether other DEVONthink users on your network can synchronize with your instance of DEVONthink Personal. In the dialog sheet that appears, check *Allow other computers on the network to sync with my databases* to allow other users access. Enter a port number on which DEVONthink Personal listens for incoming connections. If the suggested port number is already in use, you can choose any other port number. (Contact your system administrator if you're unsure.)



The list of authorized clients lists all computers that have synchronized with your instance of DEVONthink Personal before. If another user wants to connect to your machine, DEVONthink Personal will generate a random PIN on your screen that the user has to enter on his/her screen. This ensures that only persons authorized by you can synchronize with your database. Select a listed client and click the - button to withdraw the authorization.

IMPORT DATABASE



Use the *Sync with Database* button to retrieve a database from a location. Make sure to add the location that contains the database in question. Then click this button, choose the location in the sheet that appears, and click *Next*. Select the database you want to import and click *Merge*.

BACKUP

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

The backup automatically duplicates all important database files and moves the duplicates into a folder(s) named "Backup(.x)" within the DEVONthink Personal database folder/package. Select how often you want to have the backup created--never, daily, weekly, or monthly--and how many copies of the index your want DEVONthink Personal 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; they simply make sure there's a copy of the index files in case the index get corrupted. To back up your complete database, use Time Machine or a third-party backup software.

UPDATE

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

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

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

SCRIPTS

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

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

DROPLETS, FINDER PLUGINS, MAIL RULES, PDF SERVICES

PDF SERVICES

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

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

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

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

> Note: This requires an installed printer to work properly.

TROUBLESHOOTING

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DEVONthink Personal crashes when opened 76
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DEVONthink Personal was created with robustness in mind. But any computer hardware or software, regardless of how carefully developed and built, can write defective data or destroy files. If you experience problems with a database, please refer to the methods below and also look at our FAQ.

PROBLEMS SYNCHRONIZING DATABASES

If synchronizing databases doesn't work as expected, please check the following list of issues:

THE SYNC PREFERENCE PANE BEHAVES IRRATIONALLY

Close DEVONthink Personal and try again. it the behavior persists please contact our support and describe in detail what happened (a step-by-step description is preferable), and what you see on screen.

DROPBOX OR WEBDAV DON'T WORK

Please test if you can connect to Dropbox using their website or the Dropbox app. If Dropbox is down, only Dropbox or Amazon can resolve the issue. If WebDAV isn't working for you, and it's a service of your company, please contact your system administrator. If it is a commercial WebDAV service such as box.com, please contact our support with a comprehensive description on how the failure occurred.

DIRECT CONNECTIONS AREN'T WORKING

If direct connections are not working as expected or are behaving irrationally, please check the following:

- Both machines must be awake.
- Both machines must be running an edition of DEVONthink.
- Host and client machines have to be on the same subnet. Machines located on different subnets (e.g., 192.168.0.3 and 192.168.1.47) can't talk to each other. You can use VPN, though. Please contact your system administrator for more about how to get VPN to work.
- The host must allow incoming connections. Open Preferences, Sync tab, click the button *Incoming Connections*, and check if *Allow other computers on the network to sync with my databases* is checked.
- The clients must use the correct port number set on the host. Open Preferences, Sync tab, click the button *Incoming Connections*, and check the port number.

If it still doesn't work, please let us know and we'll get back to you in a timely fashion.

PROBLEMS SYNCHRONIZING WITH DEVONTHINK TO GO 1.X

If you cannot properly synchronize your database with DEVONthink To Go 1.x on your device, please check the following:

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

If you cannot see your Mac from your iOS device or the connection is flaky, please try the following:

- Create an ad-hoc Wi-Fi network from the Wi-Fi icon in your Mac's menu bar.
- Connect to this network from your iOS device.
- Sync.

If the connection now works as expected, the problem is related to your router, e.g., to security measures such as packet filtering. Version 2.0 of DEVONthink To Go will use standard data packets that should also pass your router's security without any problems.

If you still have problems with synchronizing, please visit the user forum. If you don't find an answer to your problem here, click here to contact the DEVONtechnologies support team.

REPAIRING A DEFECTIVE DATABASE

DEVONthink Personal databases are packages containing of your files and the supporting AI-based index. In rare cases this index can get corrupted or out-of-sync. But as your files are stored separately, this is not the end of the world. If your database starts behaving strangely, or if DEVONthink Personal finds inconsistencies during start-up, it is time for some housekeeping.

STEP 1: VERIFY & REPAIR

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

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

STEP 2: RESTORE FROM BACKUP

DEVONthink Personal keeps up to two copies of the index files in case that the index is damaged beyond repair. By changing the factory settings, you can change when and how many internal backups DEVONthink Personal keeps in the *Preferences, Backup tab.*

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

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

STEP 3: REBUILD YOUR DATABASE

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

During the rebuild process, the complete index is re-created; your actual files are not touched. Any problems that occured during this process are logged.

Orphaned files: Orphaned files that could not be imported while repairing are logged and moved to the folder "Orphans" inside the database folder. To rescue the orphaned files, show the folder ~/Application Support/DEVONthink 2 in the Finder and move the files in the "Orphans" sub-folder to a save location, e.g., the Desktop, or directly re-import them by dragging them to DEVONthink Personal's Dock icon.

STEP 4: TIME MACHINE OR MANUAL RESCUE

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

- **Option 1:** Restore your database from yourTime Machine backup or whichever backup medium

you use. If you don't use Time Machine, we strongly advise you to do so. External hard disks are cheap, and Time Machine makes backing up your important files quick and simple.

- **Option 2:** If you do not have a current backup of your documents, you can rescue your files manually, but you will lose any group structure. To manually copy your files from the defective database, show the folder ~/Application Support/DEVONthink 2 in the Finder. Copy the files in the "Files" subfolder, which are sorted by kind, to a save location, e.g., the Desktop. Then create a new database, re-import the files and recreate your group structure.

STEP 5: CONTACT SUPPORT

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

DEVONTHINK PERSONAL CRASHES WHEN OPENED

If a database is heavily damaged, it may be that DEVONthink Personal crashed when starting up or when opening the database. In this case you cannot use the built-in mechanisms to recover your data. But you can revert to an internal backup manually. With its factory setting, DEVONthink Personal keeps up to two copies of the index files in case the index is damaged beyond repair. You can change how many internal backups DEVONthink Personal keeps in the *Preferences, Backup tab.*

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

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

If this solution di not help, please contact DEVONtechnologies' support staff with a precise-as-possible description of your problem.

RECOVERING A LOST PASSWORD

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

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

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

PROBLEMS IMPORTING FILES

WHY DOES DEVONTHINK PERSONAL NOT RECOGNIZE MY FILES?

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

WHY DOES DEVONTHINK PERSONAL NOT DISPLAY MY DOCUMENT CORRECTLY?

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

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

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

PROBLEMS USING SERVICES

WHY DO THE SERVICES MENU COMMANDS SHOW NO SHORTCUTS?

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

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 Mail, Safari, TextEdit, etc., and, of course, all DEVONtechnologies applications. However, Firefox is a port of a Unix application not completely based on Cocoa. Therefore, it does not support Services. Try using Camino instead--a Cocoa browser based on the Firefox engine.

DEVONTHINK PERSONAL BEHAVES IRRATIONALLY

No software on this planet is bug-free, and if an application behaves irrational there is a good chance that your have just found a bug. But there could also be another cause: The application package could have become damaged during an update or through a bug in a totally unrelated piece of software on your computer.

STRANGE APPLICATION BEHAVIOR

If something happens like

- menus disappearing or silently refusing to do anything,
- windows showing graphical artefacts,
- or applications not opening at all or opening with strange error messages,

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

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

STRANGE BEHAVIOR RELATED TO DOCUMENTS

If the strange behavior only happens with a 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, packaged as a .zip archive, so that we check to see if the problem lies with DEVONthink Personal or if it the file itself.

STRANGE BEHAVIOR OF TABS

With Zooom/2 installed, tabs in tabbed windows behave stragely, e.g., close when cursor hovers over the tab. Another effect of Zooom/2 are scrolling problems in programs such as iTunes. Disabling Zooom/2 solves the problem.

FAQ

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

GENERAL QUESTIONS

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

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

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

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

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

> Note: Ray Troll has even created songs and other art about this extremely important evolution step.

RELEASE SCHEDULES, MAC OS X, AND WINDOWS

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

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

- responding to customer requests,

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

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

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

Any chance of a Windows versions of your products? We're very commited 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 Personal 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 Personal > Check Upgrade Options* to find out what you need to upgrade and how much the upgrade is for you. If this option is not available in your copy of DEVONthink Personal this application might not be upgradable. Please visit the Upgrade Assistant on our web site instead.

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

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

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

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

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

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

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

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

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

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

MAC APP STORE

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

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

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

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

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

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

Please simply visit our Download page, download a newer version that the one you have installed, and replace your copy with the newer one. FPlease 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

All frequently asked questions specific to DEVONthink Personal are located in the appendix. Please continue reading on the following pages:

- FAQ specific to DEVONthink Personal
- Troubleshooing tips and tricks

TECHNOLOGY

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

GENERAL CONCEPT

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

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

FEATURES

The DEVONtechnology is a rock-solid foundation suitable for a variety of completely independent applications. Therefore it is ideal for the rapid development of a huge range of new database-, signal-processing- and language-analysis-driven applications. The ability to deal with any kind of digital data makes it extremely flexible.

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

STRUCTURE

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

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

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

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

APPLICATIONS

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

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

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

OTHER PRODUCTS

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

OVERVIEW

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
- DEVONsphere
- DEVONnote

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

Also, we publish useful freeware apps and services that help you in your everyday work with your Mac.

NEWSLETTER & USER 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 Personal & Co.

DEVONTHINK

Organize and work with all your documents — bookmarks, email messages, text files, images, PDFs — in one place, regardless where they originated. Quickly capture data without interrupting your workflow. DEVONthink's unique AI assists you in getting the most out of your data collection.

- Learn more about DEVONthink
- Learn more about DEVONthink To Go for iOS
- Check your upgrade options if you want to upgrade to a higher edition
- Check your upgrade options if own DEVONnote and want to upgrade to DEVONthink

DEVONAGENT

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. DEVONagent Express and DEVONagent Lite (free) make searching the web as easy as using Spotlight. Search Google, Bing, YouTube, Facebook, Twitter, even the Mac App Store, right from the menu bar.

- Learn more about DEVONagent Pro
- Learn more about DEVONagent Express
- Learn more about DEVONagent Lite

DEVONSPHERE

Make your Mac smarter: Let DEVONsphere Express keep track of related emails, articles on the same subject, and similar web pages. Discover the hidden connection between seemingly unrelated files.

- Learn more about DEVONsphere Express

DEVONNOTE

Your thoughts and ideas are valuable. DEVONnote keeps them and provides you with unique tools and artificial intelligence so that you can focus on things that really matter: creating even more ideas.

- Learn more about DEVONnote
- Check your upgrade options if you want to upgrade to DEVONthink

NEEDFUL THINGS

Search files on your hard disk, watch web cams, create thumbnails, or access all your files and apps from the menu bar. Reformat paragraphs in your favorite word processor, do little calculations anywhere you can type in text, or send text to your Bluetooth-enabled mobile phone. And all this for free.

- Learn more about our freeware apps
- Learn more about our freeware services

APPENDIX

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

GLOSSARY

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

KEYBOARD SYMBOLS

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

INTERFACE ELEMENTS

- **Contextual Menu:** The menu that appears when you right-click (or ^-click) something; the contextual menu gives you access to frequently used commands that deal directly with the clicked object. Read more about the available contextual menus in the Documents and Windows chapters.
- **Item list:** A list of items stored in the database. Items can be documents, groups, or smart groups.
- **View/Edit Pane:** A part of the DEVONthink Personal main and document windows that lets you view a document or, when possible, edit it. The view/edit pane displays the content of your documents depending on their type. See also p. 45ff
- **View (1):** The layout for a DEVONthink Personal main window. You can change the layout using the commands found in the *View menu.*
- **View (2):** The display for the various document types inside the the view/edit pane or a document window. See also p. 57ff
- **Window:** DEVONthink Personal uses three different types of windows: main, document, and other. Main windows show lists of items and, in some views, also the contents of the selected document, whereas document windows show documents separately.

DOCUMENTS & GROUPS

- **Database:** A collection of all documents stored in DEVONthink Personal. DEVONthink Personal only manages one central database.
- **Document:** A file in the database; for example, a plain or RTF text, a PDF, or an image (.jpg, .tiff, .png, etc.). Technically a document is an entry in a database with text, RTF, or image content--sometimes simply referred to as "content".
- **Default Destination:** The default destination group for incoming data. In DEVONthink Personal this is the special Inbox group.
- **Group:** A collection of documents or other groups inside the database. Similar to a folder in the file system. See also p. 34ff
- **Inbox:** A special group for data coming in to a database.
- **News Feed:** A news feed is like a web page, but split 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 item and/or store it in a local database. DEVONthink Personal stores feeds in a database and displays them like a group; contents are updated live from the Internet as the connected feed changes. Older news bits are kept, while fresh news bits are added and marked as unread. When you add a bookmark that points a feed to a database, DEVONthink Personal tries to add it as a proper feed document if possible. DEVONthink Personal can also be defined as the system's RSS reader in Safari's Preferences.

- **Replicant:** A document or a group that appears in more than one place in the database. Unlike an alias in the file system, a replicant is not a real document pointing to another file (usually the original); rather it is 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. 35ff
- **Smart group:** Not a real group but a "saved search" that appears like a group. Every time you visit this smart group, DEVONthink Personal runs the attached search and displays it as the content of the group. Create smart groups using the search window or the smart group editor. DEVONthink Personal creates a number of pre-defined smart groups when you create a new database.
- **Trash:** Stores all trashed items until you physically delete them using *DEVONthink Personal > Empty Trash.*

TAGS

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

ITEM PROPERTIES

- **Flagged/Unflagged:** Items can be checked or unchecked for your personal use, e.g., for creating a to-do list, maintaining a shopping list, or 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. Both unread items and groups containing unread items are shown in bold.

The "flagged" and "locked" properties are indicated by icons. See also p. 90ff

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 noticible 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. DEVONthink Pro Office also comes with plugins for pro-grade email archiving, paper capture, and Web sharing. You can find a complete listing of all differences on the feature comparison page.

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

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

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

DATABASES

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

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

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

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

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

> Note: In general, DEVONthink Personal databases are self-contained, so one can move a database 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. This must be done in such a way that the Paths to the external files remain valid. If everything is in your Documents folder on the first computer, copying the externally linked folders and files to the Documents folder of the second computer will probably work. Always quit the DEVONthink Personal application before copying or moving a database, as copying an open database may result in an incomplete or damaged copy.

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

Can I synchronize databases between multiple computers? Yes. See also p. 22ff

SYNCHRONIZING

How many licenses do I need? Our software licenses only can be used on Macs (or user accounts) used by you. If you are synchronizing your data between multiple work places and team members, every team member needs her or his own license. We offer attractive volume discounts that you can find in our online shop. We do not offer group or site licenses.

Can I use my own file server? You can create sync stores on every volume that you can mount. These can be USB sticks, hard drives, or file servers. DEVONthink Personal can use SANs, NAS, AFP, and even SMB volumes, as well as almost any file system.

How can my Windows-using colleagues take part? Synchronization is designed to keep DEVONthink Personal databases updated. To share data with people using Windows- or Linux-PCs, consider using web sharing, which is only available in DEVONthink Pro Office.

How do I restrict access for certain user groups? To restrict access to a database, open its properties and set a user name and password. Share these credentials only with those people who should have access to this database. Use a separate database for each group or users that you want to keep separate from other groups.

Can I share my databases as read-only? No, synchronization is by default bi-directional. To share data read-only on the local network, consider using web sharing, which is only available in DEVONthink Pro Office.

SCANNING & OCR

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.

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 a tag icon. Depending on your preferences, replicants, duplicates, or replicated duplicates are indicated with a little grey icon instead of appearing in color.

- Item has been flagged See also p. 35ff
- Item is indexed, not imported See also p. 21ff
- Item is locked See also p. 35ff
- Item has a comment See also p. 52ff
- Group is a tag, too See also p. 91ff
- Item is a duplicate
- Item has one or more replicant(s)
- Item is a duplicate, but also has one or more replicant(s)

KEYBOARD SHORTCUTS

Keyboard shortcuts make using DEVONthink Personal much more efficient. Some of the following shortcuts are common to most OS X applications; others are only available in DEVONthink Personal. In addition, many menu commands have keyboard shortcuts. These are shown directly in the menu.

> Note: You can change the shortcuts for menu commands in *System Preferences > Keyboard > Keyboard Shortcuts > Application Shortcuts.*

WINDOWS

- **Tab:** Cycles focus through all entry areas and fields.
- **Shift-Tab:** Cycles focus through all entry areas and fields in reverse order.
- **Control-Tab:** Cycles through all panes.
- **Control-Shift-Tab:** Cycles through all panes in reverse order.
- **Escape:** Cancels processes, closes dialogs or Quick Look previews, etc., depending on the context.

DOCUMENT LISTS

Navigating items:

- **Up/Down arrow:** Navigates up and down in all views. Use ⇧ to select multiple entries.
- **Left/Right arrow:** Expands or collapses the selected groups in Horizontal Split, Vertical Split or List views, or navigates to previous/next item in other views.
- **Option-click (the triangle in front of a group):** Expands or collapses all groups that are containted within this group as well.
- **Option-Left/Right arrow:** Expands or collapses the selected groups and all their children in Horizontal Split, Vertical Split or List views.

Selecting items:

- **Shift-click:** Selects multiple items.
- **Shift-arrow:** Extends the current selection.
- **Command-click:** Adds an item to the selection.

Manipulating items:

- **Return:** Renames documents.
- **Backspace:** Deletes selected items.
- **Command-drag:** Copies items to the drag destination instead of moving it.
- **Command-Option-drag:** Creates replicants for the items at the drag destination. Dragging items from the Finder to DEVONthink Personal with ⌘ and ⌥ pressed indexes the item. Dragging items into documents with ⌘ and ⌥ held inserts a link to the item.
- **Command-Option-drag:** Creates bookmarks for address cards dragged in from Address Book.

Using items:

- **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"). Change *Always open groups in a new window* in Preferences, General tab to your personal taste.
- **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 full screen Quick Look slideshow.

VIEW/EDIT PANE

- **Home/End:** Goes to beginning of, or end of, any view.
- **Page up/down:** Scrolls one page up and down in any view.
- **Space/Shift-Space:** Scrolls one page down or up in non-editable views, e.g., web pages, images, or PDF documents.
- **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]*.

PLAIN AND RICH TEXT DOCUMENTS

- **Drag, then hold Option:** Copies selected text.
- **Shift-arrow:** Extends current selection.
- **Command-Option-drag:** Inserts a cross-link for groups or documents dropped into a rich text document. Dragging files or folders from the file system to a rich text document with ⌘ and ⌥ pressed creates links to them.
- **Command-click:** Opens clicked URL in the default browser or application 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):** Lists all contents containing the clicked word in the See Also drawer (identical to the *See [selected text]* in the contextual menu).

HTML PAGES, WEB PAGES, FEEDS

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

SHEETS

- **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.
- **Arrows:** Moves the editing selection.
- **Escape:** Stops editing.

PDFS

- **+:** Zooms in.
- **-:** Zooms out.
- **Command-drag:** Scrolls the visible area with the mouse.

IMAGES

- **+:** Zooms in.
- **-:** Zooms out.

TAGGING

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

INTRODUCTION

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

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

> Example: A document is located in the group "Science > Paleontology > Dinosaurs". Consequently, its tags are "Science," "Paleontology," and "Dinosaurs." Now you create a sub-group of "Dinosaurs" named "Land-living" and move the document into the new folder. Automatically it is now tagged with "Science," "Paleontology," "Dinosaurs," and "Land-living."

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

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

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

Tags represented by a regular group are called "group tags"; tags created without an existing group are called "ordinary tags." See also p. 87ff

THE TAGS GROUP

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

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

USING TAGS

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

- **Tags view:** The tags view allows you to browse your documents by tags. In the tags view, select a tag to display all items which have this tag assigned. Choose multiple tags, e.g., by clicking anothe one with ⌘ held, which shows all items carrying the 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, and tags that are also regular groups appear grey. Tags, in the Tag bar also show a pop-up menu when you click their downward triangle. The menu shows related tags that can be added to the item, and reveals tags represented by a group.

ALIASES AND EXCLUDING FROM TAGGING

DEVONthink Personal also honors aliases added to groups. You can add "alternative names" to a group using 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 automatically will be moved or replicated to the "Dinosaurs" group.

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

OPENMETA

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

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

FILE FORMATS

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

TEXT FILES

DEVONthink Personal supports plain text files (as well as Mac OS 9 SimpleText and Tex-Edit Plus files) in all encodings supported by Mac OS X, including Unicode and UTF-8. By default, DEVONthink Personal automatically recognizes the encoding and the line endings used by Mac, Windows, and 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, ft, gb, genbank, gff, h, haml, hlp, hpp, hs, hrl, id2xf, inc, js, lhs, lisp, log, lst, m, markdown, md, mdwn, mi, mis, ml, mly, mm, mmi, mml, msf, org, p, pas, pir, pl, pp, py, rb, rc, sass, scm, scpt, scptd, scriptSuite, scriptTerminology, sdef, seq, sh, sqc, sql, ss, strings, sty, sw, swiss, tab, tcl, tex, text, textile, txt, v, vcf, wrl, x, xchatlog, xd, ychat
- **HFS type codes:** TEXT, ttro, TERO, sEXT, SimpleText, scpt, osas, APPL (AppleScripts wrapped in an executable application)
- **Automatic recognition:** DEVONthink Personal also recognizes plain text file formats defined by third-party applications.

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

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

OFFICE AND OTHER DOCUMENTS

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

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

Due to the nature of Quick Look, the contents of a document that is displayed using this technology, e.g., an Apple Pages file, is sometimes not selectable. Depending on the file format, a plain or rich text alternative is available for some files, 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 on QLPlugins.com.

CHAT LOGS

DEVONthink Personal understands the text format of logs generated by Adium, iChat or Yahoo Messenger. You can import these chats like rich text files.

- **Extensions:** chat, chatlog, ichat

- **HFS type codes:** YMSG

PDF, POSTSCRIPT, SKIM

DEVONthink Personal imports and displays Portable Document Format (PDF) files, Skim PDF packages, and PostScript files. DEVONthink Personal extracts the readable text portions of the PDF, making it possible to search the text of the PDF and to use See Also & Classify. PostScript files are converted to PDF on-the-fly.

It is possible to manually convert imported PDFs to plain text or RTF by using *Data > Convert.*

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

BOOKMARKS

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

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

HTML AND XML

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

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

- **Extensions:** asp, aspx, cgi, cfm, dtd, ent, htm, html, idata, jhtml, jsp, mhtml, ompl, ooutline, php, php3, php4, phtml, plist, rdf, rsd, rss, sdef, sgm, sgml, shtm, shtml, tbx, wml, xbl, xhtm, xhtml, xml, xmloutline, xsl, xslt, webarchive
- **Automatic recognition:** DEVONthink Personal also recognizes HTML and XML file formats defined by third-party applications.

IMAGE FILES

DEVONthink Personal imports all image formats supported by Mac OS X and QuickTime.

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

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

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

MULTIMEDIA FILES

DEVONthink Personal displays or plays QuickTime movies, sounds, Flash movies and Shockwave animations. To add movies, sounds, or MP3s to DEVONthink Personal, import them like any other file into your database. Multimedia files also can be dragged into a rich text document to integrate them with text and images.

- **Extensions:** 3g2, 3gp, 3gp2, 3gpp, aac, adts, aif, AIF, aifc, AIFC, AIFF, aiff, amc, amr, atr, AU, au, avi, bwf, caf, cdda, cel, dif, dv, dvd, flc, f4v, fli, gsm, kar, m15, m1a, m1s, m1v, m2a, m2v, m3u, m4a, m4b, m4p, m4v, m75, mid, midi, mov, MOV, mp2, mp3, MP3, mp4, mpa, mpeg, mpg, mpm, mpv, mqv, MQV, pls, qht, qhtm, qt, qtpf, qtz, rtsp, sd2, sdp, sdv, skin, smf, smi, smil, sml, SND, snd, swa, swf, ulw, ULW, vfw, wav, WAV

- **HFS type codes:** .SMI, .WAV, 3gp2, 3gpp, adts, AIFC, AIFF, ALAW, "amc ", "amr ", attr, caff, cdda, DAVI, DIVX, dvc!, embd, "FLI ", grip, "GSM ", hmov, "M1A ", "M1V ", Midi, MooV, "Mp3 ", "MP3 ", MPEG, "MPG ", MPG2, MPG3, mpg4, MPGa, MPGA, MPGv, MPGV, MPGx, mxfd, PLAY, qhtm, rtsp, Sd2f, "sdp ", "sdv ", SMIL, SwaT, SWFL, ULAW, "VfW ", WAVE

DEVONthink Personal supports QuickTime file types provided by third-party components.

TEMPLATES

DEVONthink Personal comes with a number of pre-fabricated templates for general use. Use these templates to add a task list, a quote, or whole group structure for project management to your database.

MANAGING TEMPLATES

Templates are regular files stored in the Finder in the folder "~/Library/Application Support/DEVONthink 2/Templates.noindex". Navigate to this folder in the Finder to manage your templates, rename them, organize them in sub-folders, or delete them.

More templates are available as extras. See also p. 56ff

PRE-FABRICATED TEMPLATES

DEVONthink Personal comes with the following pre-fabricated templates, which serve as great examples of the template feature.

> Note: Not all of the listed templates are available in DEVONthink Personal as DEVONthink Personal does not support AppleScript. Templates based on simple files or on template packages are available, though.

General use:

- **Note:** Adds a new note. If the clipboard contains text, it is automatically inserted; if the clipboard contains an Internet address (URL), it is added to the note's link list.
- **Phone Note:** Adds a new phone note, automatically inserting the current date and time.
- **Task List:** Adds a simple task list.
- **Web Browser:** Adds an HTML document that allows you to use DEVONthink Personal like a regular web browser. Open the 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 used by man European companies 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 this feature 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 this feature for databases that contain knowledge spanning many subjects.

Education:

- **Cornell Notes (Pages):** Adds an Apple Pages document that allows you to write notes in Cornell style.
- **Cornell Notes (rich text):** Adds a rich text document that allows you to write notes in Cornell style.
- **Quote (from clipboard):** Adds a rich text document for a quotation 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 smart groups selecting documents larger than 5 MB.
- **PDF (not searchable):** Adds smart groups selecting all PDF documents that don't contain machine-readable text.

TEMPLATE PACKAGES

Besides the more complex smart templates, DEVONthink Personal supports template packages. These are folders with the file name extension ".dtTemplate" that contain one or multiple folders, one for each supported language. This way, depending on the system language, you can let DEVONthink Personal import the files in the right 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's 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 a clickable rich text link if the clipboard contains a valid URL

SMART TEMPLATES

Most of the prefabricated templates are "smart templates": They are not simple files, but actually AppleScript packages that are executed when selected in the *Data menu.* These packages contain 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; this is also possible using a template package.
- The script can add information to the pre-fabricated template, e.g., 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.

WEB SITE EXPORT TEMPLATES

For exporting information as web site, DEVONthink Personal uses templates available in ~/Library/Application Support/DEVONthink 2/Websites/ to create HTML files from documents. You can choose the template in the save dialog that appears when you use *File > Export > as Website*

In the HTML templates, the following placeholders can be used:

- %databasePlusLocation%
- '%comment%
- %url%
- %tags%

These placeholders will be replaced with actual information during the export. The placeholders will only be replaced in documents that are converted to HTML during export--namely plain text, rich text, Microsoft Office/OpenOffice documents, scripts, chat logs, and sheets.

SEARCH OPERATORS

In the toolbar search field you can use standard and extended Boolean operators, parenthesis, and more to fine tune your search.

The syntax of the operators is compatible to DEVONagent and EasyFind, the Finder, Spotlight, common search engines as well as common programming languages such as C, C++, Objective-C, Java, and JavaScript. The complexity of the query is unlimited.

CASE

All terms are case-insensitive. You may, if you wish, use capitalization for proper names in a query, but DEVONthink Personal will ignore case in interpreting the query.

PRECEDENCE OF TERMS

Search terms and associated operators will be interpreted from left to right, except as modified by including portions of the query within parentheses.

WILDCARDS

You can replace parts of words with wildcards matching one, multiple, or a range of characters:

- **?:** Matches exactly one character.
- ***:** Matches none, one, or multiple characters.
- **[a-b]:** Matches one character of the range "a" through "b".
- **[abc...] or [a|b|c|...]:** Matches one character out of the given list of characters.
- **[^...]:** Matches one character that is not contained in the given list or range.

BOOLEAN OPERATORS

The operators (often called Boolean operators) are words or symbols that establish logical rules for the terms in the search query. If no operator is given, DEVONthink Personal infers 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

Besides the classic Boolean operators, DEVONthink Personal uses a number of operators that usually are found in high-end databases. Use these operators 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 linked 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

By using any or all of the operators and rules layed out above you can create complex queries that find the exact information you're 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" no farther ten words away from each other, 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 10 words) to words either starting with "effect" (and so also "effects") or "impact". In addition, the document needs to contain the word "side" or any word starting with "second" located within two words range of any word starting with "effect".

TEMPLATE TAGS FOR WIKI-STYLE LINKS

In DEVONthink Personal you can create new documents by first selecting some text in a rich text document and then making it a link using the contextual menu. When you then click this link, DEVONthink Personal creates the new document using a template you set in the Editing Preferences. In this template, can use the tags below to automatically insert the name of the link, the current date or other information. See also p. 36ff

- **%@:** Name of link
- **%%:** A "%" character
- **%a:** Abbreviated weekday name
- **%A:** Full weekday name
- **%b:** Abbreviated month name
- **%B:** Full month name
- **%c:** Shorthand for "g%X %x," the locale format for date and time
- **%d:** Day of the month as a decimal number (01-31)
- **%e:** Same as %d, but does not print the leading 0 for days 1 through 9
- **%F:** Milliseconds as a decimal number (000-999)
- **%H:** Hour based on a 24-hour clock as a decimal number (00-23)
- **%I:** Hour based on a 12-hour clock as a decimal number (01-12)
- **%j:** Day of the year as a decimal number (001-366)
- **%m:** Month as a decimal number (01-12)
- **%M:** Minute as a decimal number (00-59)
- **%p:** AM/PM designation for the locale
- **%S:** Second as a decimal number (00-59)
- **%w:** Weekday as a decimal number (0-6), where Sunday is 0
- **%x:** Date using the date representation for the locale, including the time zone
- **%X:** Time using the time representation for the locale
- **%y:** Year without century (00-99)
- **%Y:** Year with century (such as 1990)
- **%Z:** Time zone name (such as Pacific Daylight Time)
- **%z:** Time zone offset in hours and minutes from GMT (HHMM)

METADATA

DEVONthink Personal stores a large number of metadata fields internally when importing documents from the file system, e.g., from PDF, RTF, MP3, EXIF/IPTC, HTML, and email messages as well as from all files that deliver metadata through the Spotlight metadata importer. Here's a partial 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 dddresses
- Email addresses

Electronic publications:

- Album
- Composer
- Contributors
- Publishers
- Editors
- Organizations