

# DEVONthink Pro

VERSION 2.5.2  
DOCUMENTATION

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

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

together in one database. Use DEVONthink Pro 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 PRO ADVANTAGE

### WHY DEVONTHINK PRO?

DEVONthink Pro 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 Pro 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 Pro 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 Pro is also tightly integrated with OS X. DEVONthink Pro provides a [Dock menu](#), [Services menu](#) commands, and makes optimal use of the Safari web browser engine.

## WHAT CAN YOU DO WITH IT?

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

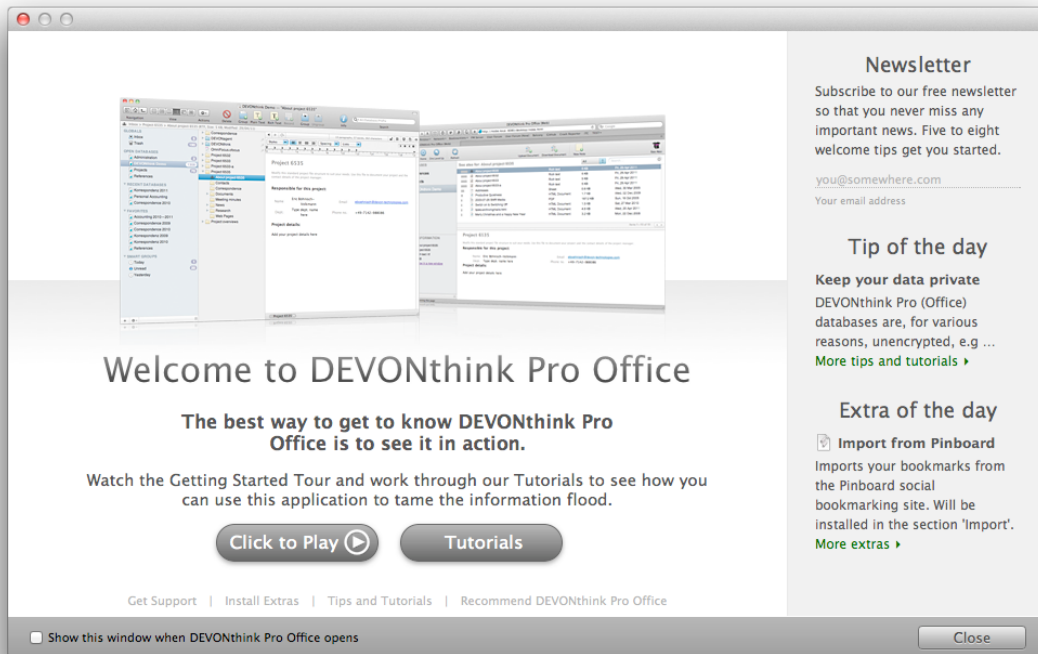
- ▶ Create text documents, edit them in full screen mode using all the tools Mac OS X provides and cross-reference them with Wiki-style or static links.
- ▶ Use the [Services menu](#), the [Dock menu](#), the [Dashboard widgets](#) and the [Sorter](#) to clip information and jot down notes.
- ▶ Integrate Web content and local documents.
- ▶ Display all common newsfeed formats and clip important news directly to your database.
- ▶ 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 Pro 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 and scripts that extend DEVONthink Pro'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 in all open databases 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 Pro 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 Pro 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 Pro, simply copy the application package from the disk image to your Applications folder, replacing the

old version. Your database(s) will not be affected. If you purchased DEVONthink Pro 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 Pro is able to use all available physical memory. This means database size databases is limited only by the amount of available RAM and the speed of your computer. However, in 64-bit mode DEVONthink Pro uses about 60 percent more RAM than in 32-bit mode.

If you don't need 64-bit mode, you can disable it by selected DEVONthink Pro application package in the Finder, e.g., by right-clicking DEVONthink Pro'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 Pro to a higher edition, you have the following options:

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

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

### UPGRADING TO DEVONTHINK PRO (OFFICE)

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

If this fails to occur automatically, do the following:

- 1) Copy the complete folder "~/Library/Application Support/DEVONthink 2" to your Desktop, and
- 2) Rename the folder and add the filename suffix, ".dtBase2" (without quotes). The folder has now become a DEVONthink Pro database icon, which you can double-click.

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

Note: We don't recommend installing both DEVONthink Personal and DEVONthink Pro on the same machine. Among the reasons why: Both applications use the same Services menu shortcuts, and Mac OS X would assign the shortcuts sometimes to DEVONthink Personal, other times to DEVONthink Pro. And [DEVONagent](#) stores contents in DEVONthink Pro if it's available, which means contents would not be stored in DEVONthink Personal.

### DOWNGRADING TO DEVONTHINK PERSONAL

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

### UNINSTALLING

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

- ▶ DEVONthink Pro
- ▶ ~/Library/Application Support/DEVONthink Pro 2
- ▶ ~/Library/Preferences/com.devon-technologies.thinkpro.\*
- ▶ All DEVONthink Pro-specific scripts in ~/Library/Scripts/
- ▶ All DEVONthink Pro-specific workflows in ~/Library/Workflows/

- ▶ All DEVONthink Pro-specific scripts in ~/Library/PDF Services/
- ▶ Dashboard widgets
- ▶ Bookmarklets from your web browser
- ▶ The reference to the global inbox folder in your Finder's sidebar

## VERSION HISTORY

### VERSION 2.5.2

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.
- ▶ Favorites are shown in destination popups.
- ▶ 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 Pro 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.
- ▶ Toolbar search didn't always correctly search only in results of global smart groups.
- ▶ Saving e.g. modified grayscale JPEG images could corrupt the image file.
- ▶ Pressing  $\text{⌘S}$  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 brings better image zooming using gestures, and improves compatibility 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 Pro 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 multiple 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. 25ff](#)
- ▶ 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 Pro, 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 occurrences in PDF and PostScript documents.
- ▶ Support for global smart groups, e.g. creating new documents is now possible after selecting a destination group in the global smart group.
- ▶ [Scripts > Import > References from Bookends](#) updates (synchronizes) already imported references and allows to cancel the import. Bookends 11.3.5 or higher is required for synchronizing.
- ▶ Scripts [Scripts > Import > Phone List](#), [Evernote file \(.enex\)...](#), [Astronomy Picture of the Day](#), and [Mars Explorer Rover Mission Images](#).
- ▶ Scripts importing email attachments set the URL of attachments to the sender's address so that it's easier to find attachments.
- ▶ Smart templates *Days of the week*, *Months*, and *Decimal Filing System*.
- ▶ [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.
- ▶ Suppressing the dialog "Database seems to be already in use" is now a global option.
- ▶ 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.
- ▶ Handling of feeds.
- ▶ 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](#).
- ▶ Description of AppleScript terminology updated.
- ▶ 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 committed.
- ▶ 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.

Removed:

- ▶ Obsolete scripts *Scripts > Import > BluePhoneElite Calls, BluePhoneElite SMS, This week's MacDesktops*.
- ▶ Obsolete script "Add news to DEVONthink" for endo.
- ▶ Obsolete workflow "Copy Checked Records to iPod Notes".
- ▶ Growl support from *Scripts > Reminders > Add as To Do to TaskPaper*.

### 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 Pro 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 and synchronization via AppleScript.
- ▶ It's (again) possible to open more than 25 databases concurrently.
- ▶ Sorter's Take Note panel better handles images; no more focus ring.
- ▶ Currently selected tab is usually retained, e.g. after capturing notes.
- ▶ AppleScript support, e.g. for downloading web archives or converting documents to PDF.
- ▶ Compatibility to RSS 2.0 feeds; simplified listing of feeds in Activity window.
- ▶ 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.
- ▶ Preview pane of [Split, Three-Pane, Columns and Tags view](#) wasn't always reset after switching databases.
- ▶ Name of trash in locations was sometimes wrong.
- ▶ *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.

Removed:

- ▶ Obsolete scripts *Import > Daily Dilbert* and *Export > Backup to JungleDisk*.

## 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. It also makes importing references from Bookends faster and more reliable. DEVONthink Pro 2.4.2 improves the first launch experience with a new assistant that guides new users through the first steps, as well as better chosen default options. This update is recommended for all users.

New:

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

Improved:

- ▶ [Scripts > Import > References from Bookends](#) is faster, more reliable and retrieves the title of references (requires Bookends 11.3.3 or later).
- ▶ Recognition of duplicates.
- ▶ *Make Rich Text* automatically shows the ruler again if it was used the last time.
- ▶ Compatibility of RSS style sheets to Retina displays.
- ▶ *File > Export > as Outliner Processor Markup Language* renamed to *as OPML* and *as Rich Text (RTF/RTFD)* to *as RTF/RTFD Document*.
- ▶ The kind of PostScript, EPS, and Illustrator documents is shown not just as "PDF" or "PDF+Text".
- ▶ .emlx files can be indexed on OS X 10.8 "Mountain Lion" again.
- ▶ The new scanner/camera feature's queue cleans up after sending files to DEVONthink Pro.
- ▶ 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.
- ▶ Not all items of the menu *Data > New from template* were disabled in case of read-only databases.

- ▶ Moving items to external folders didn't ignore parent groups in the trash.
- ▶ French localization.
- ▶ Further minor bugs and glitches.

Removed:

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

### VERSION 2.4.1

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

Improved:

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

Fixed:

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

Removed:

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

### VERSION 2.4

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

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

DEVONthink Pro and up:

- ▶ **NEW:** Apple Mail rule script "Mail Rule - File messages & attachments".
- ▶ **NEW:** Apple Mail rule scripts can be installed via *DEVONthink Pro > Install Add-Ons* and easily selected in Mail's rule editor (OS X 10.8 Mountain Lion and later).
- ▶ **NEW:** Folder action scripts "DEVONthink - Import to selected group" and "DEVONthink - Index to selected group".
- ▶ **NEW:** Shortcut  $\text{^} \uparrow \text{⌘} \text{W}$  for *File > Close Database*.
- ▶ **NEW:** Script "References from Bookends" to batch import references from Bookends (Bookends 11.3.1 or later).
- ▶ **Improved:** Smart templates for Bookends, EndNote, and Sente (EndNote X4 resp. Bookends 11.3.1 or later).
- ▶ **Improved:** It's now possible to redirect Safari's and Google Chrome's downloads to the inbox folder.
- ▶ **Improved:** Missing favorite databases in the sidebar are now disabled.
- ▶ **Improved:** AppleScript support.
- ▶ **Improved:** Cookie handling of *Download Manager*.
- ▶ **Fixed:** *Delete Database* command of contextual menu of sidebar didn't always work.

- ▶ **Fixed:** Import and index droplets (see Extras folder on disk image) were not compatible to Lion.
- ▶ **Fixed:** Annotation smart template didn't work in views without a view/edit pane.
- ▶ **Removed:** Obsolete *Contextual Menu Plugin* option in the *Install Add-Ons* panel.
- ▶ **Removed:** Obsolete script *Export > Backup to iDisk*.
- ▶ **Removed:** Obsolete EndNote X3 smart template.

DEVONthink Personal and up:

- ▶ **NEW:** Scanning and importing images from digital cameras. [See also p. 31ff](#)
- ▶ **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*.
- ▶ **Improved:** Option "Safari 5 Extension" of *Install Add-Ons...* panel renamed to "Safari 6 Extension" on Lion and Mountain Lion
- ▶ **Improved:** Stricter recognition of duplicate PDF documents.
- ▶ **Improved:** *Data > New > ...* menu commands create files immediately, e.g. for external editing.
- ▶ **Improved:** Image views support Page Up/Down shortcuts.
- ▶ **Improved:** Page Up/Down keys can be used to navigate inside a visible Quick Look panel without having to activate it via the mouse first.
- ▶ **Improved:** Naming of last used destination in *Take Note* and *Clip to DEVONthink* panels.
- ▶ **Improved:** *Data > Open With* excludes Incredible Bee Archiver.
- ▶ **Improved:** SkimNotes framework updated to version 1.2.9.
- ▶ **Fixed:** Worked around bugs in OS X's PDFKit framework and OS X 10.8 Mountain Lion.
- ▶ **Fixed:** Google Chrome extension installation compatible to now required Chrome Web Store.
- ▶ **Fixed:** Harmless console messages.
- ▶ **Fixed:** *Capture* command of web views didn't work if the page was a PostScript document.
- ▶ **Fixed:** Paged PDF documents added by bookmarklets, *Clip to DEVONthink* or scripts were not always complete on OS X 10.7 Lion.

All editions:

- ▶ **NEW:** Compatibility to OS X 10.8 Mountain Lion.
- ▶ **NEW:** Simple 64-bit support so that the amount of data and the number of databases is only limited by available real memory and the speed of the computer.
- ▶ **NEW:** *Share* button for sharing the current document or web page via services like iMessage, Mail, Twitter, Facebook, or AirDrop, or to add it to Safari's Reading List (OS X 10.8 Mountain Lion or later).
- ▶ **NEW:** Notifications. Clicking a notification opens the item in DEVONthink Pro. (OS X 10.8 Mountain Lion or later)
- ▶ **NEW:** Documents can be moved, replicated, or duplicated by dragging its document icon from the title bar.
- ▶ **NEW:** Video tutorials, available via the Support Assistant or *Help > Tutorials*.
- ▶ **NEW:** Columns URL, Path, Aliases, and Spotlight Comment of search results are editable.
- ▶ **NEW:** Buttons to go to the previous/next highlight added to navigation bar of PDF/text documents.
- ▶ **NEW:** Additional optional toolbar items.
- ▶ **NEW:** Shortcut ⌘-C for *Move To* button of *See Also & Classify* drawer.
- ▶ **NEW:** Autocompletion of tags, e.g. in the *Tags* bar, matches not only prefixes but also substrings.
- ▶ **NEW:** High resolution application icon for Retina screens.
- ▶ **Improved:** Tags in the *Tags* bar and the tags field of the *Info* panel are now sorted.

- ▶ **Improved:** Toolbar search results are automatically hidden after creating new items in three-pane, split, and columns view.
- ▶ **Improved:** Support Assistant shows an activity indicator while loading data.
- ▶ **Improved:** Much faster importing of Spotlight comments if the files/folders are indexed by Spotlight.
- ▶ **Improved:** Templates access the address book only if necessary.
- ▶ **Improved:** Support Assistant and Help > Contact no longer access the address book anymore on OS X 10.8 Mountain Lion or when DEVONthink Pro 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 adds scripts for importing email attachments via Apple Mail rules, makes the tutorials easier accessible, improves some aspects of the user interface, and fixes a number of bugs and glitches.

DEVONthink Pro and up:

- ▶ **NEW:** Scripts for importing attachments via Apple Mail rules and via the Scripts menu extra.
- ▶ **Improved:** Global smart groups remember the sorting used in the upper/right pane of three-pane views.
- ▶ **Fixed:** Trial time could expire too fast depending on the number of used databases.
- ▶ **Fixed:** *Global Inbox in Save Dialogs* of *Install Add-Ons* panel could temporarily stall the application.
- ▶ **Fixed:** Exporting database archives to the folder containing the database and using the same name failed.
- ▶ **Fixed:** Sente smart template created documents in the database root in some circumstances.
- ▶ **Fixed:** Setting the selection via AppleScript didn't always work.
- ▶ **Removed:** Obsolete script *Scripts > Export > Backup to ZumoDrive*.

DEVONthink Personal and up:

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

All editions:

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

#### VERSION 2.3.4 – 1.0.1

Skipped.

#### VERSION 1.0

Initial release.

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Copyright © 2010 [Zencoder, Inc.](#)

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

# COMMON TASKS

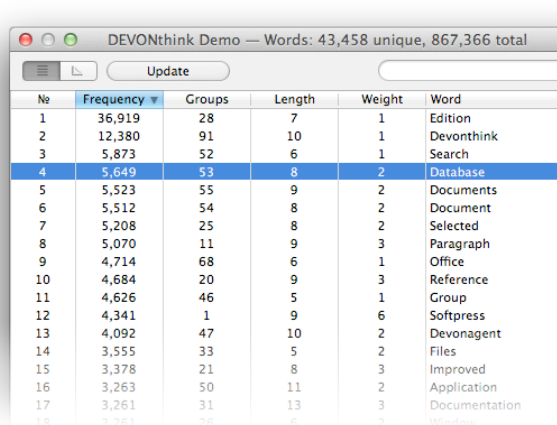
## In this chapter:

Analyze text documents	18
Browse the Internet	18
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Catalog your Disks, CDs, and DVDs	20
Catalog your photos and MP3 files	20
Collect text snippets and other valuable data	21
Index files on your hard disk	21
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In this chapter you'll find a number of common ways you can use DEVONthink Pro 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 Pro can be used to analyze large numbers of text documents.



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

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

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

The *Search* and *Similar* buttons open drawers that

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

Other functions that help you analyze documents include the AI-enhanced [search function](#) that also features a list of similar words based on spelling or contextual similarity. The [See Also](#) button lists documents with a similar content, and the topics pop-up menu displays the most important words of a document. Duplicate documents are instantly marked in blue and bold.

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

Possible uses:

- ▶ Analyze the complexity and focus of a specific document collection
- ▶ Find relationships between documents or snippets quickly
- ▶ Clean up large collections of documents

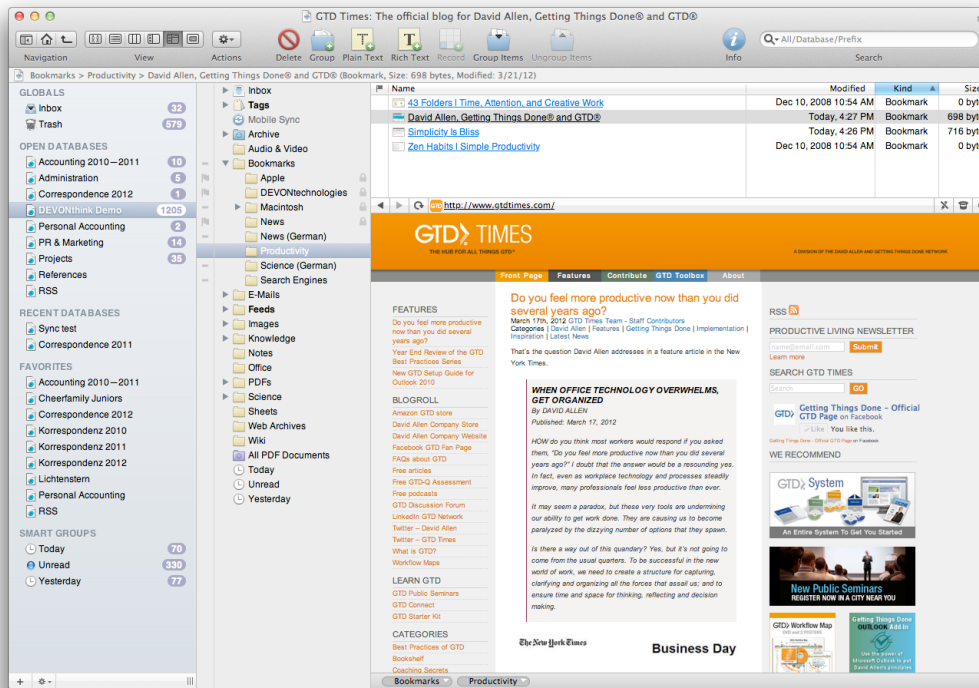
Continue to read here:

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

## BROWSE THE INTERNET

Besides being a knowledge and information database, DEVONthink Pro acts as a [web browser](#).

This extends the document-based approach to knowledge to the World Wide Web. Because DEVONthink Pro 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 Pro immediately loads and displays its content live from the Internet in the view/edit pane. You can then archive the complete page to the database for offline viewing.

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

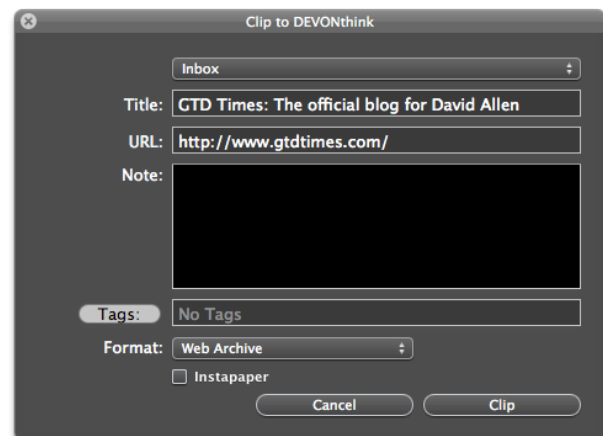
Possible uses:

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

Continue to read here:

- ▶ [Capture data from the Web](#)
- ▶ [Create a new URL or HTML document](#)
- ▶ [View "live" and local HTML pages](#)
- ▶ [Integrate news feeds with your data](#)

## CAPTURE DATA FROM THE WEB



Increasingly, information is provided not on paper but directly through Web sites, blogs, online news sites, [Facebook](#), and user forums. DEVONthink Pro 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 Pro.

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

## CATALOG YOUR DISKS, CDS, AND DVDS

By using the [Index](#) function, you can use DEVONthink Pro to set up a catalog for CD-ROMs or other removable volumes. Create a group for each disk by using the index function, and organize your disks/groups in any way you like. When you need a specific file, search for it in DEVONthink Pro, insert the volume, ^ click the file in DEVONthink Pro, 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 Pro also manages multimedia data such as photos, illustrations, MP3s or movies.

While not designed to replace iPhoto or iTunes, DEVONthink Pro 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 Pro [See also p. 35ff](#)

Possible uses:

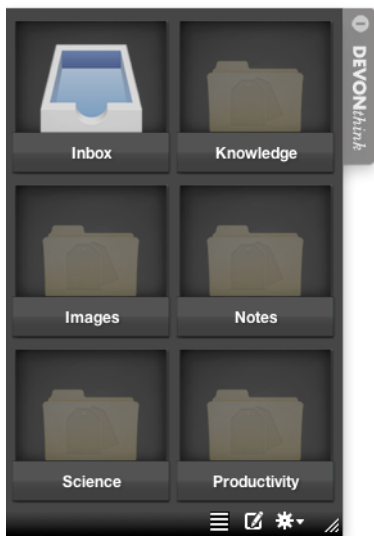
- ▶ Create a dedicated database for photos only
- ▶ View your images in full screen mode
- ▶ Keep project-related images and other documents together
- ▶ Play your MP3s from within your work environment

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

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

## INDEX FILES ON YOUR HARD DISK

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

Possible uses:

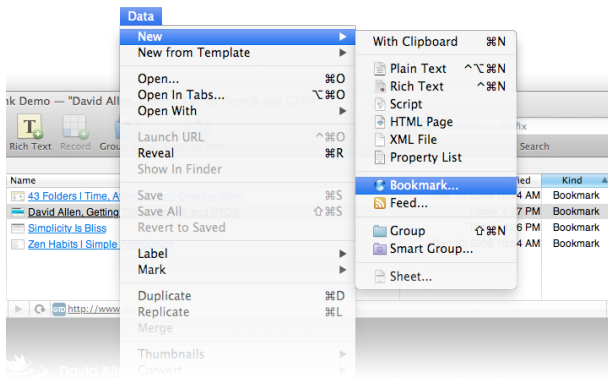
- ▶ Access information from CD-ROMs
- ▶ Create a front-end for your document collection
- ▶ Integrate static documents with other project-related data

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 Pro 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 Pro 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.

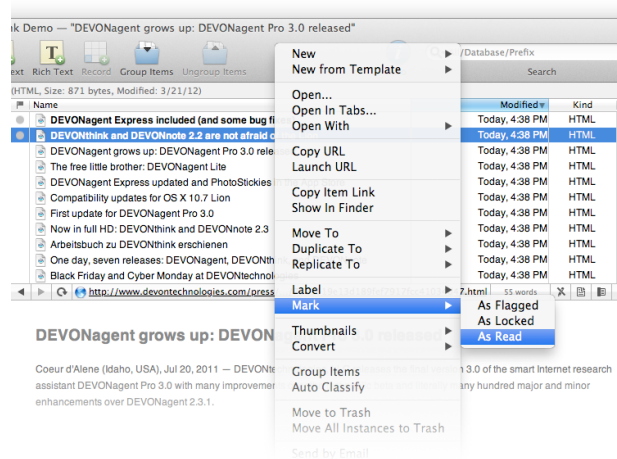
Possible uses:

- ▶ 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 Pro

Continue to read here:

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

## READ NEWSFEEDS



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

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

Possible uses:

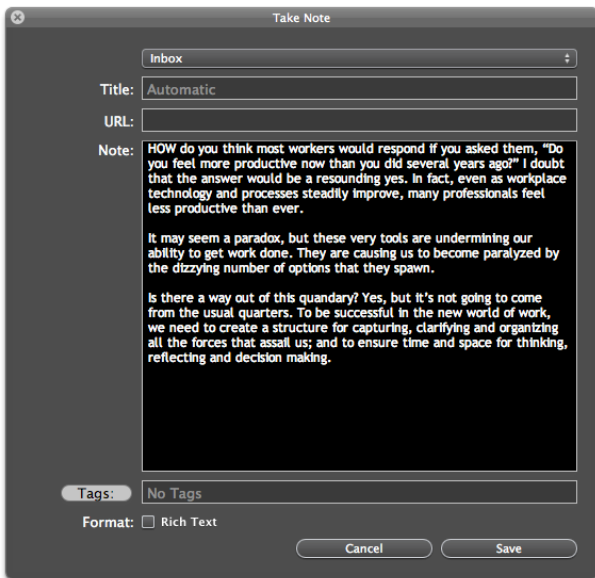
- ▶ Read your daily news in a convenient interface
- ▶ Integrate "live" newsfeeds with your other documents
- ▶ Grab interesting information easily and store it in DEVONthink Pro

Continue to read here:

- ▶ [Create a new bookmark or HTML document](#)
- ▶ [View "live" web pages and news feeds](#)
- ▶ [Create a news feed document](#)
- ▶ [Copy news from your RSS reader to DEVONthink Pro](#)

## TAKE NOTES

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



Use DEVONthink Pro'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

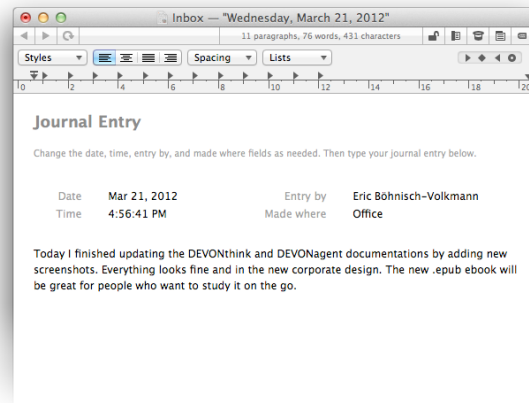
Continue to read here:

- ▶ [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 and the full screen mode DEVONthink Pro 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 Pro, you can switch from one document to another with just one click, and manage even large projects with ease.

By [flagging](#) groups and documents DEVONthink Pro can also be used as a simple outliner. Unlike other outliners, DEVONthink Pro 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](#)
- ▶ [Use the Concordance drawer](#)

# IN & OUT

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DEVONthink Pro 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

## DRAG AND DROP

The easiest way to add data to DEVONthink Pro, other than creating the documents directly inside the application, is to drag files or selected data, e.g. text, images, etc., into a DEVONthink Pro 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 Pro's interface.

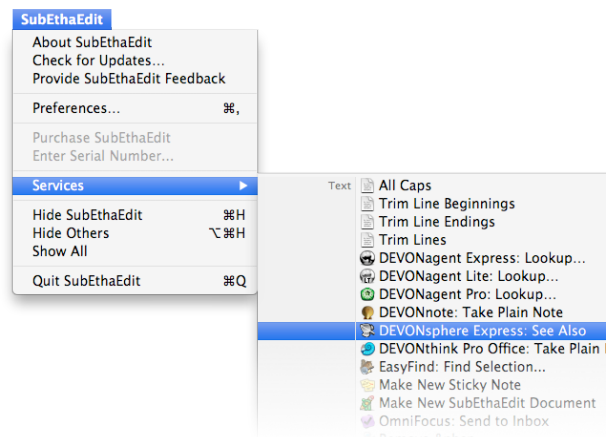
If you need to keep the files in their original location, but want to use them inside of DEVONthink Pro, drag them with `⌘` and `⌘` pressed (like making an alias in the Finder) or use [File > Index](#). A reference to the file is inserted in your database and linked to the original outside DEVONthink Pro. 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 from outside the database, e.g. to compile some source codes, you may want index them instead of importing.

## SERVICES

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



## DEVONTHINK PRO SERVICES

DEVONthink Pro 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 menu.

- ▶ **Take Plain/Rich Note:** Adds selected text to the global inbox from any application that supports 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 Pro 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 Pro's inbox. This menu item is only shown when available, e.g., when Safari is the active application.
- ▶ **Append Plain/Rich Note:** Adds selected text as plain or rich text to the last note taken using the DEVONthink Pro Services menu items.
- ▶ **Lookup:** Opens the [Search window](#) in DEVONthink Pro with the selected text copied as search term.
- ▶ **Summarize:** Creates a new note in DEVONthink Pro's inbox with a summary of the selected text. DEVONthink Pro 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.

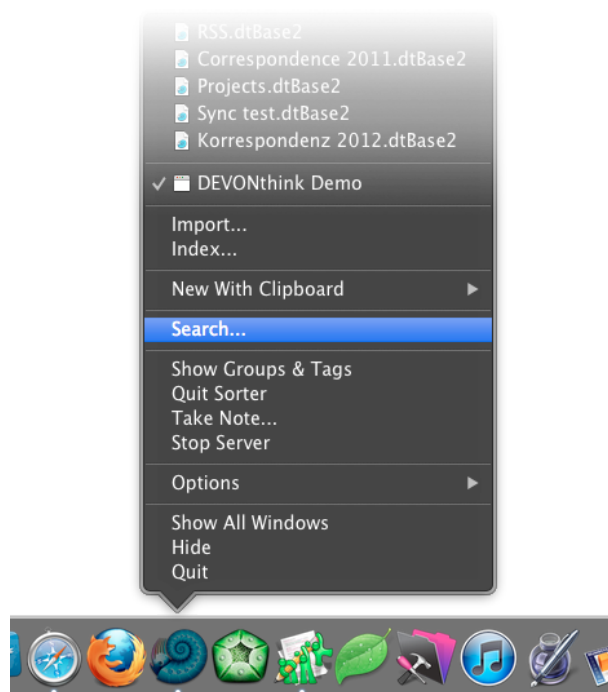
## THE SORTER SERVICES

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 Pro you need to log out, then back in again for new services and their shortcuts to be recognized. If one or more DEVONthink Pro *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 Pro's icon* in the *Dock* with the  $\wedge$  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 Pro 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

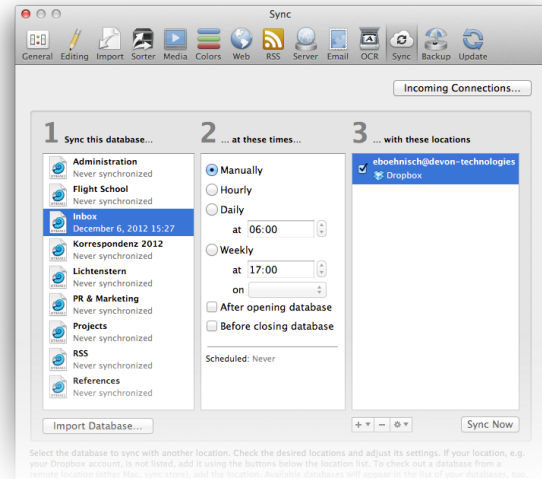
Synchronizing directly is much faster than using a sync store, but requires both machines to be connected to your local network, switched on, and have DEVONthink open at the same time.

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 synchronize 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 which databases are synchronized, at which times, and with which locations in [Preferences](#), [Sync tab](#).

- ▶ **Step 1:** Select the database you want to set up.
- ▶ **Step 2:** Choose when you want to sync this database automatically, or just leave *Manually* selected.
- ▶ **Step 3:** Check all locations to which you want to sync this database.
- ▶ **Step 4:** 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 Pro 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 *Import Database*.
- ▶ **Step 3:** Select a location.
- ▶ **Step 4:** Select the database to import; DEVONthink Pro only shows databases not yet available on this Mac.

After downloading, DEVONthink Pro 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 Pro has the ability to synchronize its databases with [DEVONthink To Go](#), its companion app for iPhone, iPad, and iPod touch devices.

**Synchronizing with the device:** DEVONthink Pro 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 all databases 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. In the global inbox there is no *Sync* group; it is always synchronized as a whole. You can add documents as well as whole groups to the *Sync* group. Smart groups are not yet supported, and will be ignored during synchronization.

Make sure your device is on the same WiFi network 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 Pro 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 Pro 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 Pro 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.

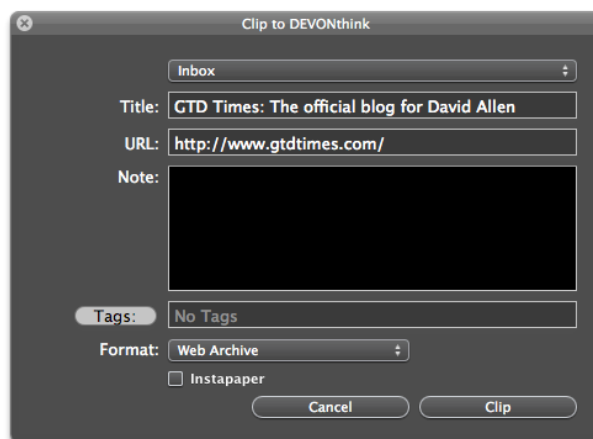
## INSTALLATION

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

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

## USING BOOKMARKLETS

Launch the web browser you have placed bookmarklets into. 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.



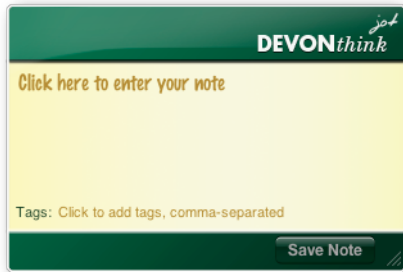
The *Clip to DEVONthink* bookmarklet or extension is perhaps the best choice as it uses a special panel in DEVONthink Pro that lets you enter a title along with a note and tags, and lets you choose in which format you want to save the clipped data. The note is either saved as a plain or rich text file 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 Pro 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 Pro's default destination right from the Dashboard.

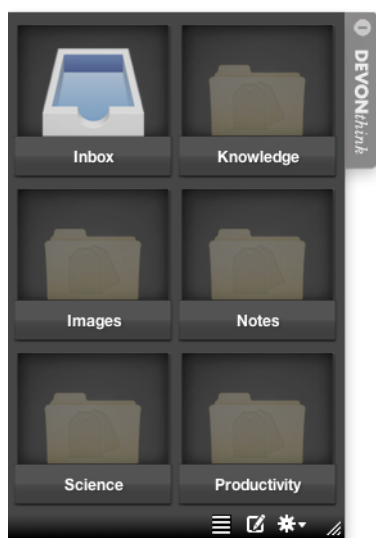
The front of the widget is where you can type your note's message. Click into the writing area to make the insertion caret appear. Enter any [tags](#) below the note taking area. Click the *Take Note* button to save the note to your database.



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 Pro 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 Pro Sorter consists of multiple (drop) *boxes*. The first box is always the [global inbox](#); all other boxes you

can connect to any group in any of your databases. When you drop files or clippings onto a box, the Sorter files it in the connected group. Should the database containing the connected group not be available, e.g., because DEVONthink Pro is not open, the Sorter stores the dropped data until the database is opened, and then flushes the contents of the box.

In addition, you can use the Sorter to quickly add a note to DEVONthink Pro 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  $\wedge$  held) to open a window for the connected group in DEVONthink Pro or to remove the connection. Double-click a box to open the connected box in DEVONthink Pro.

## 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  $\mathfrak{M}$  pressed to move the item; drag with  $\mathfrak{M}$  and  $\mathfrak{C}$  pressed to add only a reference of the item to DEVONthink Pro (index). For URLs dragged from a browser this creates a bookmark; hold  $\mathfrak{M}$  and  $\mathfrak{W}$  to create a web archive instead. Only files can be moved to the Sorter; folders and clippings are always copied. For items dragged from DEVONthink Pro, 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 Pro 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 Pro 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 Pro'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 Pro 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 accidentally told the Sorter (not to) hide when an application goes to full-screen mode and now you want to change this behavior, do the following: First quit the Sorter, e.g., by using its *action menu*. Then, open the Terminal application (located in /Applications/Utilities) and copy the following line into a new window, followed by the  $\leftarrow$  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

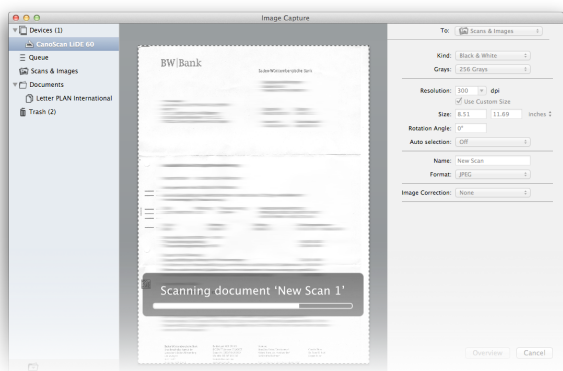
DEVONthink Pro comes with built-in support for [Image Capture compliant scanners](#).

DEVONthink Pro automatically makes scanned documents searchable by using optical character recognition (OCR). OCR adds an invisible text layer to the scanned file that is computer-readable and searchable--a layer that is recognized by DEVONthink Pro'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 bottom 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.

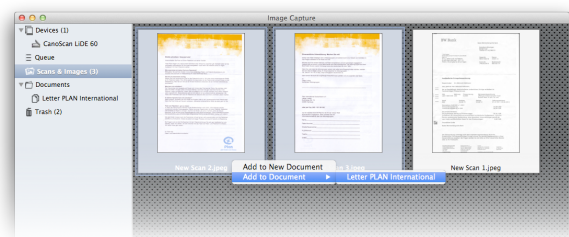
Choose the scan destination in the *To* pop-up menu. Either send the scan directly to any of your databases, add them as single files to the *Scans & Images* section, or choose any document that you have created in the [Document](#) section.

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

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

## SCANS & IMAGES



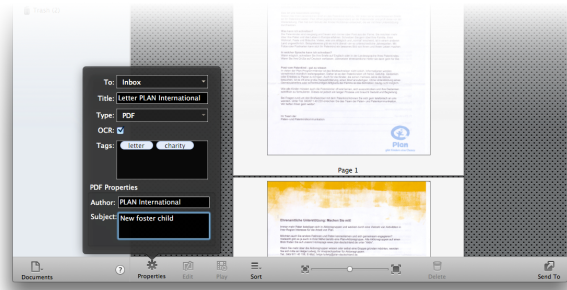
This is where scans or images downloaded from your camera appear. Select images to set their properties, edit (crop, rotate), play downloaded movies, or delete.

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  $\wedge$ Control held to use the contextual menu for adding or deleting documents. Alternatively, use the *Documents* button at the bottom of the sidebar.

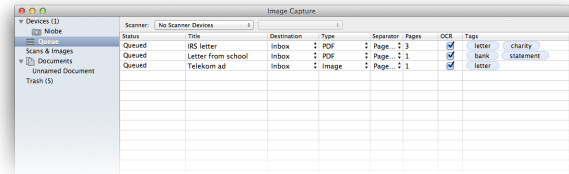
Add pages by dragging them from the *Scans & Images* to the document in the sidebar. Rearrange added pages if desired and set the document properties by clicking the *Properties* button. This is similar to single scans in the *Scans & Images* section. Use the *Sort* to reverse the sort order or shuffle 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  $\wedge$ 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 Pro offers in the menu bar, the global Mac OS X *Services* menu, and the handy *Dock* menu.

## THE APPLICATION MENU

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



## ABOUT DEVONTHINK PRO, ...

- ▶ **About DEVONthink Pro:** Shows information about DEVONthink Pro including the version number and licensing information.
- ▶ **Check for Updates:** Checks if updates for DEVONthink Pro are available. By default, DEVONthink Pro 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 Pro only downloads a file listing the most current versions to your Mac. This option is not available if you have purchased DEVONthink Pro 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 Pro in the Mac App Store, this menu item may not be available. To open the Install Add-Ons window, [click here](#) instead.



The following options are available:

- ▶ **Application Scripts:** [Menu extra scripts](#) extending third-party applications, e.g., Mozilla Firefox or NetNewsWire.
- ▶ **DEVONthink Pro Scripts:** [Menu extra scripts](#) providing system-wide functions.
- ▶ **DEVONthink Jot Widget:** Installs the [DEVONthink Jot](#) dashboard widget.
- ▶ **Safari 6 Extension:** The Safari extension "Clip to DEVONthink" lets you clip web pages to your database or add links with notes, similar to the ["Clip to DEVONthink" bookmarklet](#).
- ▶ **Google Chrome Extension:** Opens the [Download Extras](#) page in Google Chrome from where you can install the Chrome extension (similar to the Safari extension). You have to do this manually and follow Google's rules.
- ▶ **Firefox Extension:** Similar to the Safari 5 extension, but for Firefox.
- ▶ **PDF Services:** Adds an alias of DEVONthink Pro to the "PDF Services" folder so that you can "print" directly from any application to your database. [See also p. 89ff](#)
- ▶ **Folder Action Scripts:** [Scripts](#) that can be "attached" to folders and are triggered when you add new items to that folder. Use them to add incoming files from a networked scanner or a folder-based workflow to your database. On Mac

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

- ▶ **Apple Mail Rule Scripts:** Installs the [mail rule scripts](#) for Apple Mail on OS X 10.8 or later. Choose them for *Execute Script* action in Apple Mail's rule editor.
- ▶ **Global Inbox in Save Dialogs:** Inserts DEVONthink Pro's [global inbox](#) into the Finder's sidebar and all "Save As" dialog windows. Use it to save directly to the inbox from any application. Note: The name of the inbox is "Inbox" regardless of your computer's language preferences.
- ▶ **DEVONthink Sorter Helper:** A helper application that launches [the Sorter](#) when you log in.

Check your options and click the *Install* button to make DEVONthink Pro install or reinstall the necessary files and scripts into their respective 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 Pro.

- ▶ **Purchase License:** Opens the [DEVONtechnologies Online Shop](#) and puts DEVONthink Pro into your shopping cart. If this copy of DEVONthink Pro 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 Pro publishes its own services. [See also p. 46ff](#)

## THE FILE MENU

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

### NEW, OPEN, OPEN RECENT

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

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

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

### NEW WINDOW

**New Window:** Opens a new [main window](#) for an open database. (If only one database is open, no sub-menu is available.) DEVONthink Pro 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 Pro allows other import modules to be added. DEVONthink Pro comes with the following default import plug-ins:

- ▶ **Address Book:** Imports addresses from the Mac OS X Address Book as a sheet, as vcards (.vcf), or as bookmarks. Tip: To import all addresses, select all addresses in the group "All" and import them. Address card bookmarks link to the original card in the Address Book application.
- ▶ **Bookmarks:** Imports bookmarks from [Camino](#), [Firefox](#), [Google Chrome](#), [OmniWeb](#), or Safari as bookmarks. Only new bookmarks are imported if you use this command again.
- ▶ **From Scanner or Camera:** Imports printed documents from a connected scanner or camera. [See also p. 31ff](#)

**Import Site:** Opens the [Download Manager](#) and downloads a complete web page/site for archiving and offline viewing. Make sure the [download](#)

[options](#) are set correctly, especially the options that define which links DEVONthink Pro should follow (if any). All links within the site are modified so that they point to the downloaded images or other embedded objects. This ensures that the page/site can be displayed at any time. By default, groups created by the Download Manager are excluded from tagging.

## 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 Pro almost exactly. Metadata files (".DEVONtech\_storage") make sure that no metadata such as comments, URLs, etc., are lost. DEVONthink Pro 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 Pro 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 OPML:** Exports the selected items as one [OPML](#) 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 Pro 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. 125ff](#)

- ▶ **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 Pro 2/Templates.noindex' in the Finder, then create sub-folders, move items, rename them, or trash them.
- ▶ **Database Archive:** Creates a clean copy of the frontmost database and compresses it as a .Zip archive. Back up the copy to any medium or server to keep your data safe from hardware or software failures.

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

## INDEX, UPDATE INDEXED ITEMS

**Index:** Adds selected files to your database, but only as references, not in their entirety. DEVONthink Pro indexes the contents of the file and uses this for classification and other content-related functions. Indexed items show a little arrow after their name. For unknown file types, this command creates a bookmark. You can also drag files from the Finder to DEVONthink Pro; 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 reflexed in its OpenMeta metadata (and are so noticeable by external tagging applications).

Note: External indexed files or folders located in "/System/", "/Library/" or "~/Library/" are never renamed or deleted 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 Pro 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](#).

**Synchronize All:** Synchronizes all open databases with its designated locations.

## PROPERTIES

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

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

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

## PAGE SETUP, PRINT

**Page Setup:** Sets your preferred page size.

**Print:** Prints the selected or front-most document.

## THE EDIT MENU

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

### UNDO AND REDO

**Undo/Redo:** 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 Pro.

**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.

**Sheets:** Use this sub-menu to add new rows or new columns to a selected [sheet](#), and to edit or delete columns. By pressing  $\uparrow$  and  $\mathbb{A}$ , you can select multiple columns in a sheet.

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

## FIND

**Find:** This sub-menu contains commands for finding and replacing text as well as for bringing DEVONthink Pro'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 occurrence, 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 Pro.

- ▶ **With Clipboard:** Creates a new document based on the contents of the Clipboard. Note: Some applications such as [Microsoft Word](#) put data in multiple formats into the Clipboard. DEVONthink Pro 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](#). You can use the built-in Mac OS X WYSIWYG editor to edit the HTML page or switch to its source code ([from the navigation bar](#)) and edit it directly.
- ▶ **XML File:** Creates a new [XML document](#).
- ▶ **Property List:** Creates a new property list (for developers).
- ▶ **Bookmark:** Creates a new bookmark. Type the URL you like and name it; DEVONthink Pro automatically sets the value of its URL field in the [Info panel](#) accordingly. If you don't type in a name, DEVONthink Pro looks up the page name on the Internet and sets it automatically for you.
- ▶ **Feed:** Creates a new [news feed](#) document. DEVONthink Pro asks for a document name and the URL of the feed. You can change the URL later by selecting the feed document and changing the URL field in the [Info panel](#).
- ▶ **Group:** Create a blank [group](#).
- ▶ **Smart Group:** Creates a new smart group, also known as "saved search". DEVONthink Pro 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.
- ▶ **Sheet:** Creates a new [sheet](#). Add columns to the new sheet by using the + button. Name the columns and sort the sheets by dragging them with the mouse. Click OK to create the new sheet.

**New from Template:** In addition to these standard document types DEVONthink Pro 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 an AppleScript or 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. 122ff](#)

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 Pro automatically synchronizes the file when it is being saved to disk by the other application. If you have quit DEVONthink Pro 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. 114ff](#)

## 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 Pro, 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 Pro generates a PDF file; otherwise DEVONthink Pro 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 Pro 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.

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

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

**Auto Classify:** This command analyzes the selected documents and tries to find the groups where they would fit best. If a document cannot be classified with certainty, DEVONthink Pro beeps and lists it in the [Log panel](#). If DEVONthink Pro 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 Pro commands.

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

## FONT

**Font:** This sub-menu is responsible for controlling the font 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 Pro 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 Hyphenation:** Enables or disables hyphenation for the current rich text document.

## THE VIEW MENU

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

### VIEWS

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

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

### VIEW OPTIONS

**Cover Flow:** When checked, DEVONthink Pro 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 Sidebar:** Shows or hides the [main sidebar](#) that lists all open and recent databases, global smart groups, the global inbox and the trash.

**Show/Hide Details:** Switches between displaying icons only or displaying icons together with detailed information such as kind, label, size, 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 unlauded characters when sorting elements. DEVONthink Pro 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 Pro'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 Pro database. Use these commands to go backwards and forwards through your documents, or to move back to the top level of the group hierarchy.

### TOP GROUP, ...

**Top/Enclosing Group/Selected Group:** Goes back to the top level of the group hierarchy, to the group enclosing the shown group (if any), or to the selected group ("hoist"). These commands are only useful when you have opened a group in a second [main window](#), so that the "root" of the window is not the top group of database, or when you are using DEVONthink Pro 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 the [Three Panes view](#) and in [Search windows](#).

### INSTANCES, HIGHLIGHTS

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

**Previous/Next Highlight:** Navigates backwards and forward through all highlighted passages within a document, regardless of whether these passages have been highlighted by a search 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 Pro 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 Pro 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.

**Concordance:** Opens the [Concordance window](#) for a selected database. (If only one database is open no sub-menu is shown.) The concordance shows all words in the database, sorted by frequency. Use it to analyze accumulated information or to find the most common words.

## DATABASE TOOLS

Like any database, DEVONthink Pro 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 Pro 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 Pro 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 Pro 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.

## DOWNLOAD MANAGER

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

## LOG PANEL

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

## ACTIVITY PANEL

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

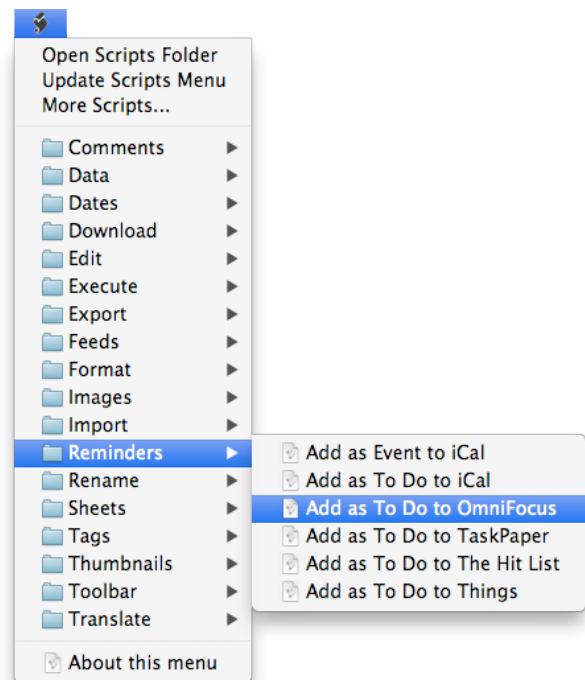
## THE SERVICES MENU

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

[See also p. 24ff](#)

## THE SCRIPTS MENU

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



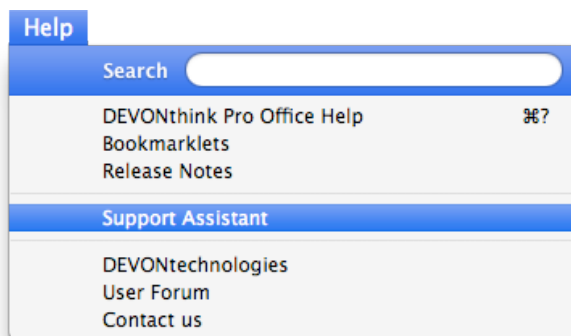
Some of the scripts work without having selected a document, while others require you to select the document you want the script to interact with. In general, the script will tell you what you have to do when you select it from the *Scripts* menu.

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

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

## THE HELP MENU

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



## DEVONTHINK PRO 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 Pro](#) 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 Pro 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 Pro](#) assistant. The tutorials help get you started by explaining everyday DEVONthink Pro tasks in step-by-step detail. This function requires an Internet connection.

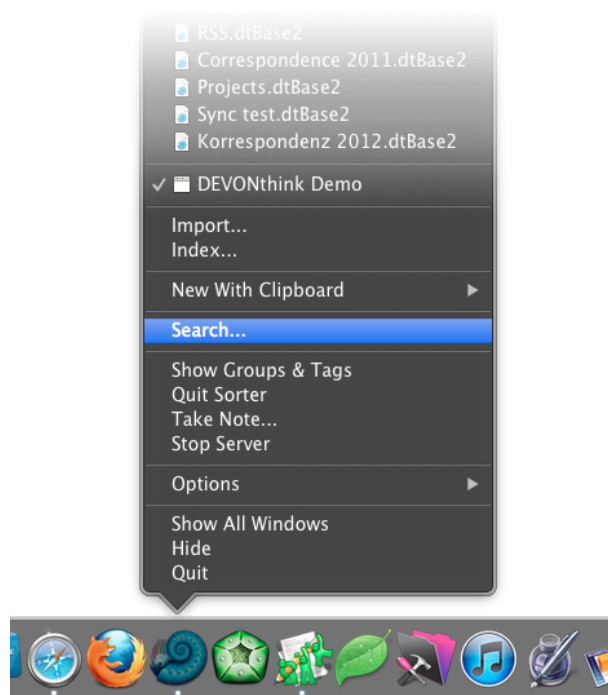
## DEVONTECHNOLOGIES

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 Pro's icon* in the *Dock* with the  $\wedge$  key pressed, when you right-click it, or when you left-click it and hold the mouse button for one second or longer.

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

Besides these standard commands, DEVONthink Pro 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](#).

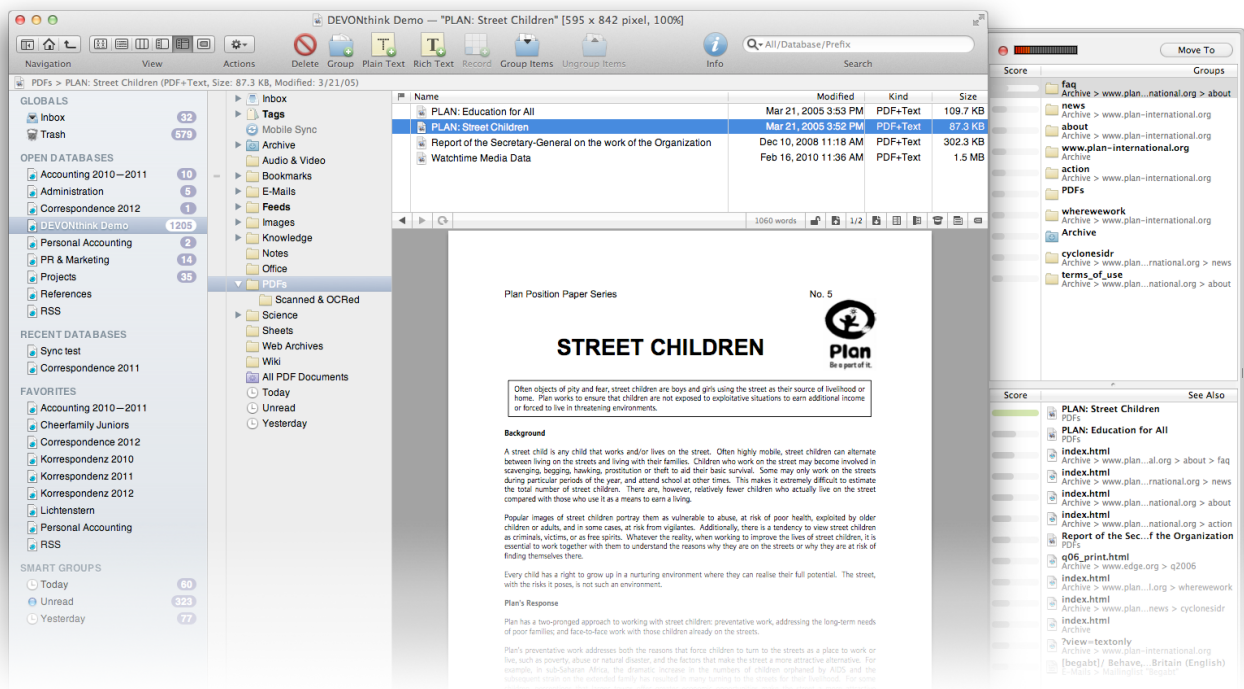
# WINDOWS & PANELS

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DEVONthink Pro 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 Pro 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 Pro 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 Pro 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 representing the tag or in the global inbox, and are tagged with the selected tag. [See also p. 118ff](#)


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.

## SIDEBAR


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



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



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

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

create smart groups, open the [Database Properties](#) panel, and add databases or groups to or remove them from the *Favorites*. Databases and groups in the Favorites are also listed in destination popup menus.

For the  *Inbox*, most database-related menu commands are available, too, such as [Tools > History](#) or [Tools > Concordance](#). An action menu and a + button give access to commonly used functions.

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

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

The sidebar's width and visibility is specific for each database, which allows you to customize the look and feel of each database.

## ITEMS

DEVONthink Pro 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 Pro. You can also drag selected items or clippings such as text and images from any application to DEVONthink Pro 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. 40ff](#)
- ▶ Icons of [feeds](#) or other unread items show an "unread" indicator in the *State* column. [See also p. 72ff](#)
- ▶ 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. 117ff](#)

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 Pro 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 Pro 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. 117ff](#)

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

- ▶ **Quick Look:** Opens the standard Quick Look panel for the selected items.
  - ▶ **Group +:** Creates an empty group.
  - ▶ **Smart Group +:** Creates a new smart group.
  - ▶ **Plain/Rich Text +:** Creates a blank plain or rich text document.
  - ▶ **Link +:** Creates a new link document.
  - ▶ **Sheet +:** Creates a new sheet.
  - ▶ **New Record:** Creates a new record (row) in a sheet.
  - ▶ **Delete Records:** Deletes selected records (rows).
  - ▶ **New Column:** Adds a new column to a sheet.
  - ▶ **Delete Columns:** Deletes selected columns.
  - ▶ **Columns:** Opens the columns editor, which allows you to rename, reorder, add, or delete columns.
  - ▶ **Mark Up:** Highlights, 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. 36ff](#)
  - ▶ **Print:** Prints the current or selected documents.
  - ▶ **Info:** Opens the [Info panel](#).
  - ▶ **Group/Ungroup Items:** Group creates a new group and moves all selected documents into it.
- Ungroup moves all documents contained in the selected groups one level up and then deletes the then-empty group.
- ▶ **Auto Classify:** Classifies the selected documents and moves them into the most appropriate group if possible.
  - ▶ **Find (search field):** Lets you search your databases. Select your search options from the *magnifier pop-up menu*, enter your search term, and press *Return*. Click the search field's search button to return to the standard view. The pop-up menu also lists the last 25 used search terms. Check *Prefix while typing* to let DEVONthink Pro 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. 57ff](#)
  - ▶ **Find:** Opens the [Search window](#).
  - ▶ **Bigger, Smaller Font:** Increases or decreases the font size.
  - ▶ **Subscript, Superscript:** Makes selected text subscript 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.
- Note: Not all of these commands are always available. You can customize the toolbar by selecting [View > Customize Toolbar](#) or by clicking with  $\wedge$  pressed (right-click) the toolbar background and selecting *Customize Toolbar* from the contextual menu.
- ## CONTEXTUAL MENU
- The contextual menu (which appears when you right-click or  $\wedge$  click an item) offers a range of commands tailored to what you wish do with the clicked object.
- Most of the commands offered by the contextual menu have counterparts in a main menu, so you'll recognize them immediately. However, to save menu bar real estate, DEVONthink Pro 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 referring the selected item to the clipboard. Paste this URL into any third-party application to directly reference an item in your DEVONthink Pro 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.

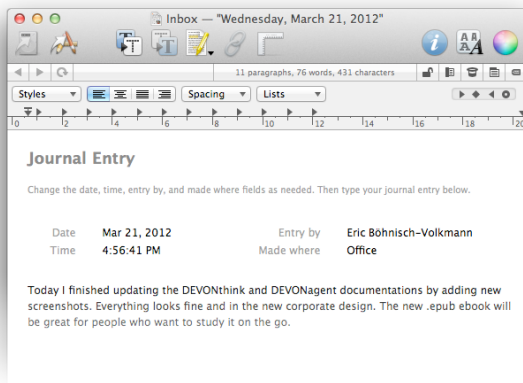
In the [sidebar](#), the following commands are available:

- ▶ **New Window:** Opens a new window for the selected database.
- ▶ **New Database:** Creates a new database.
- ▶ **Open Database:** Opens a selected database.
- ▶ **Show in Finder:** Shows the database package in the Finder.
- ▶ **Close Database:** Closes the selected database.
- ▶ **Delete Database:** Closes the selected databases, and moves it to the Finder's trash.
- ▶ **Add to Favorites:** Adds the selected database to the favorites.
- ▶ **Remove from Favorites:** Removes the selected database from the favorites.
- ▶ **Empty Trash:** Empties the trash.

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

## DOCUMENT WINDOW

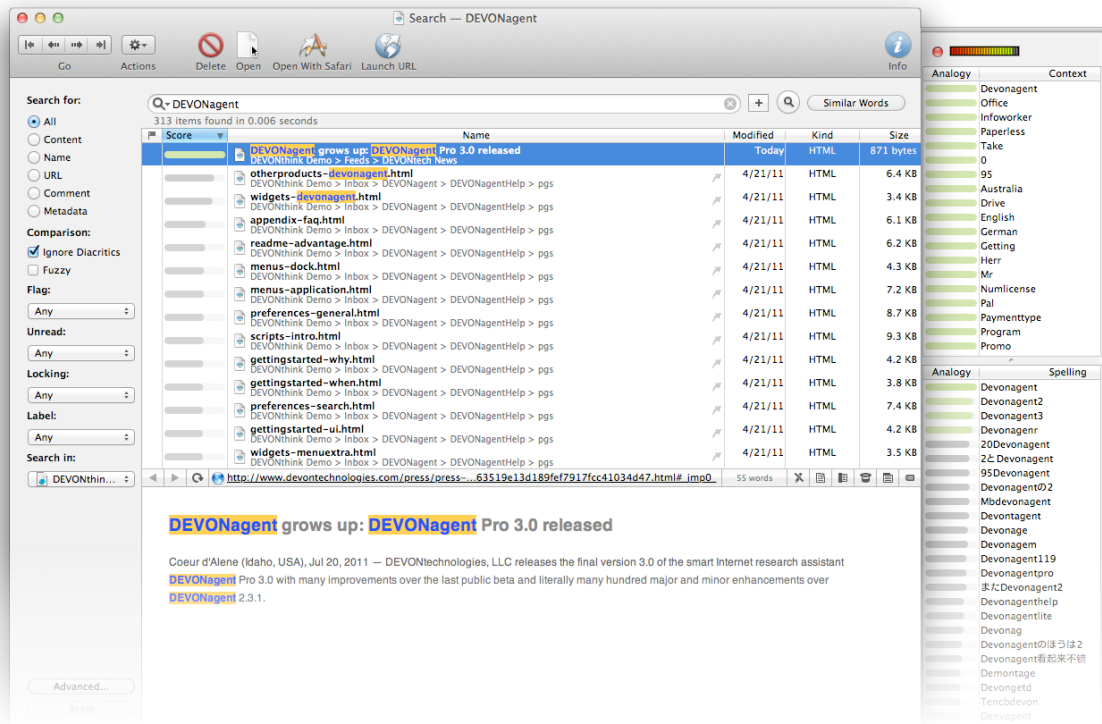
A document window is similar to the view/edit pane of a main window. You open a document window by double-clicking a document in any view of a main window or by choosing *Data > Open* (or any of its equivalents in contextual menus).



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

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 Pro main window toolbar.

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

To broaden or adjust your search 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  $\hat{\cup}$  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 Pro 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 Pro 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. 79ff](#)

## SEARCH RESULTS

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

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

Due to limitations in Mac OS X's PDFKit, highlighting of occurrences of the search term in the document is not tied to words; thus, DEVONthink Pro 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. A smart group that searches all databases is placed into the [sidebar](#).

## TOOLBAR & SHORTCUTS

The toolbar of the search window offers many tools that are also present in DEVONthink Pro 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.
- ▶ **Scripts:** Gives access to the [Scripts menu](#).
- ▶ **Open:** Opens the selected document(s) in separate document windows.
- ▶ **Open Externally:** Opens the selected documents in an external application.
- ▶ **Launch URL:** Opens the Internet location stored in the URL field of the selected documents, such as a web site URL in Safari.
- ▶ **Copy URL:** Copies the Internet location stored in the URL field of the selected document to the clipboard.

- ▶ **Group:** Groups the selected documents in a new group.
- ▶ **Delete:** Moves the selected documents to the trash.
- ▶ **Export:** Exports the selected documents.
- ▶ **Info:** Opens the [Info panel](#).
- ▶ **Print:** Prints the selected documents.
- ▶ **Zoom:** Zooms in, 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. 117ff](#)

## CONTEXTUAL MENU

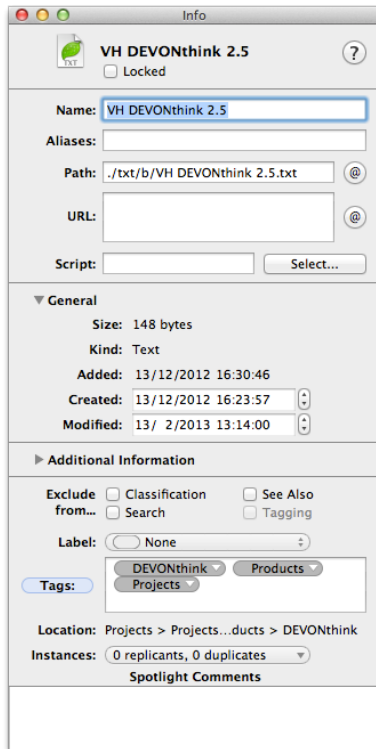
You can manipulate the search results by right-clicking or clicking them with `⌘` pressed to open the contextual menu, which offers various additional commands.

- ▶ **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 accidentally 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*.

## ATTACHED SCRIPT

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

## INFORMATION ELEMENTS

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

**Kind:** Shows 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. 118ff](#)

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

**Instances:** Shows how many replicants of this document or group exist in the database and how many duplicates DEVONthink Pro 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 Pro synchronizes the Spotlight comments in the Finder with this field in the database.

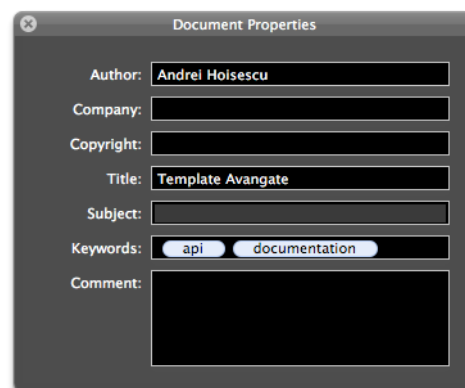
Note: You can modify the comments of multiple selected items simultaneously, as long as the comment of all selected items is either identical or empty.

## 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.

## CONCORDANCE

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

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

Use the concordance to analyze your data by:

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

## CONCORDANCE LIST

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

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

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

## DRAWERS

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

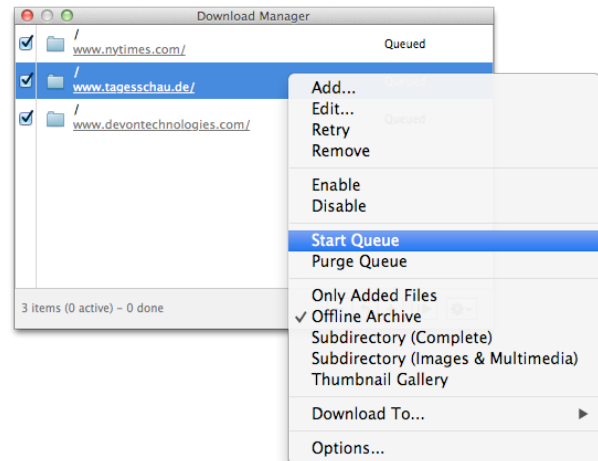
## FREQUENCY GRAPH

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

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

## DOWNLOAD MANAGER

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



## PANEL ELEMENTS

The Download Manager panel consists of:

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

## ADDING FILES

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

You can also paste one or more URLs (copied Safari bookmarks, DEVONthink Pro links, or copied links from [DEVONagent Pro's](#) Download Manager),

or add files to the Download Manager by using the contextual menu in web and HTML views.  $\text{⌘}$  clicking a link also adds it to the Download Manager.

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

## THE ACTION MENU

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

- ▶ **Add:** Add another file to the list.
- ▶ **Edit:** Edit the parameters of a selected item in the list.
- ▶ **Retry:** Attempts to reload an item that failed to download.
- ▶ **Remove:** Removes the selected items from the list. Alternatively, you can press the *Delete* key.
- ▶ **Enable/Disable:** Checks or unchecks the selected items. Only checked items will be downloaded.
- ▶ **Start/Stop Queue:** Starts or stops the download queue. Same as the *play/pause* buttons at the bottom of the panel.
- ▶ **Purge Queue:** Removes all items from the list that have been completely downloaded.
- ▶ **Only Added Files to Thumbnail Gallery:** Offers various predefined option sets (see below).
- ▶ **Import Files to Database:** Selects which database the downloaded files shall be stored in. Select *Folder* to save them directly to the file system.
- ▶ **Options:** Opens the options dialog sheet, which allows you to specify in detail what to download, which links to follow, and where to store the downloaded files (see below).

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

- ▶ **Only Added Files:** Downloads only the files you have manually added to the Download Manager.
- ▶ **Offline Archive:** Downloads the files you have added to the Download Manager including embedded images, style sheets, and scripts.

Use this option set to archive/download web pages with everything necessary to display them properly. Alternative: [Create a web archive](#).

- ▶ **Subdirectory (Complete):** Downloads the files you have added to the Download Manager including all embedded or linked files. This option set follows all links leading to (items in) sub-directories. For example, use this option set to download a complete web site for offline archiving.
- ▶ **Subdirectory (Images & Multimedia):** Same as above, but downloads only linked images, linked multimedia files including Flash and QuickTime movies, and embedded images in the item's directory and all sub-directories. Use this set to download a complete web site for offline archiving (without all linked Office documents, PDFs, etc.)
- ▶ **Thumbnail Gallery:** Downloads the files you have added to the Download Manager including linked images, embedded images, style sheets, and scripts. Use this option set to download a thumbnail gallery including all full-size images linked to each thumbnail for offline archiving.

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

## OPTIONS

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

- ▶ **Files:** Check all file types you want the Download Manager to download (plain texts, rich texts, Office documents and PDF files, style sheets and scripts, images, embedded images, multimedia files, mark-up language files, etc.) Use the *Follow Links* pop-up menu to define how far DEVONthink Pro should follow links on the downloaded HTML pages (see below). Check *Overwrite existing* to update an existing archive.
- ▶ **Folder:** When you choose *Download to > Folder* in the action menu of the Download Manager panel, DEVONthink Pro stores all downloaded items in the directory you specify. Click *Set* to choose your preferred location. Use this option to use the integrated Download Manager for downloading software archives or other files you don't want to

store in your database. Double-click any part of the location to reveal it in the Finder.

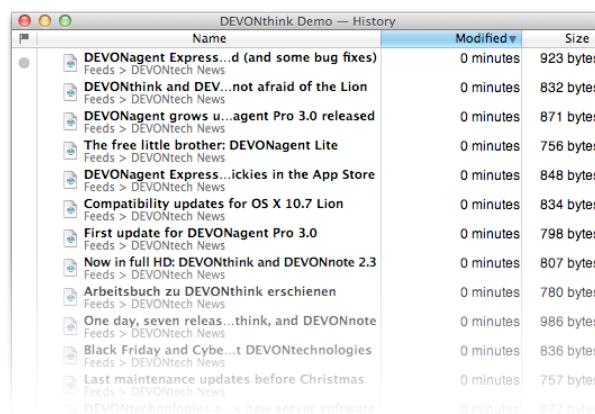
- ▶ **Download:** Define how many connections the Download Manager opens at the same time. (Choose fewer connections for slower Internet connection, more for DSL or broadband.) Also, check *Automatically purge queue* to have previously downloaded items automatically removed from the queue.

The *Follow Links* options defines how far DEVONthink Pro follows links on the downloaded HTML pages. This feature allows you to control what gets downloaded--only the actual pages or a complete web site. DEVONthink Pro supports the following options:

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

## HISTORY

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



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

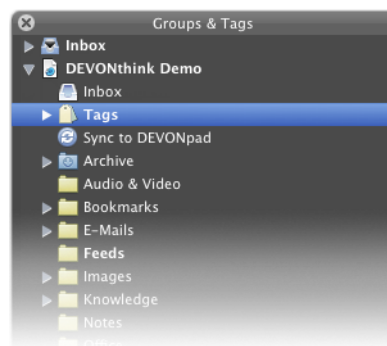
Sort the list by name, age, or file size by clicking the column titles (Click again to reverse the sorting order.), and by any other criterum using [View > Sort](#). Customize the columns using [View > Columns](#).

Of course, you can use drag-and-drop to move documents to other windows or 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

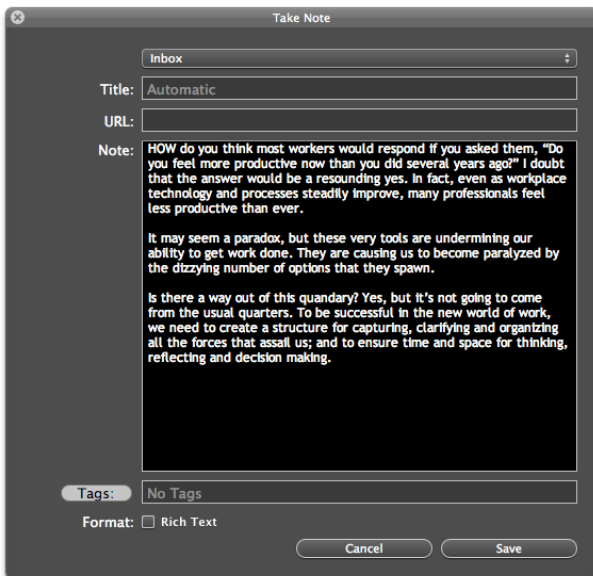
The *Groups & Tags* panel, opened using [Tools > Show Groups & Tags](#), gives you direct access to all open databases and their groups including the tags inside the special Tags group. Use it to drag items directly to a group or tag or to rearrange groups. You can also apply menu commands to selected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



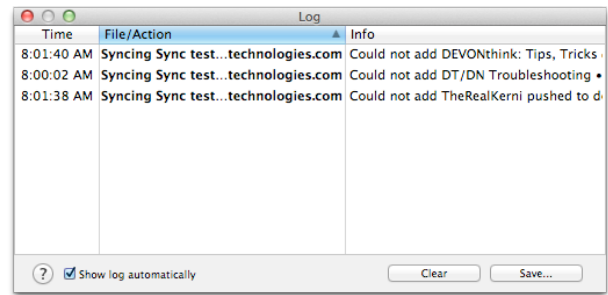
Check *Rich Text* to take a rich text note. Use the [Format](#) menu to style your note.

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

Note: For this function DEVONthink Pro 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  $\wedge$  held to perform additional commands on log entries via the contextual menu, e.g., to reveal a logged item. Copy information from the log to the clipboard with [Edit > Copy](#),  $\text{⌘}C$ , or the contextual menu.

## ACTIVITY

The Activity panel shows a list of currently running background processes, e.g., refreshing news feeds, and 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.

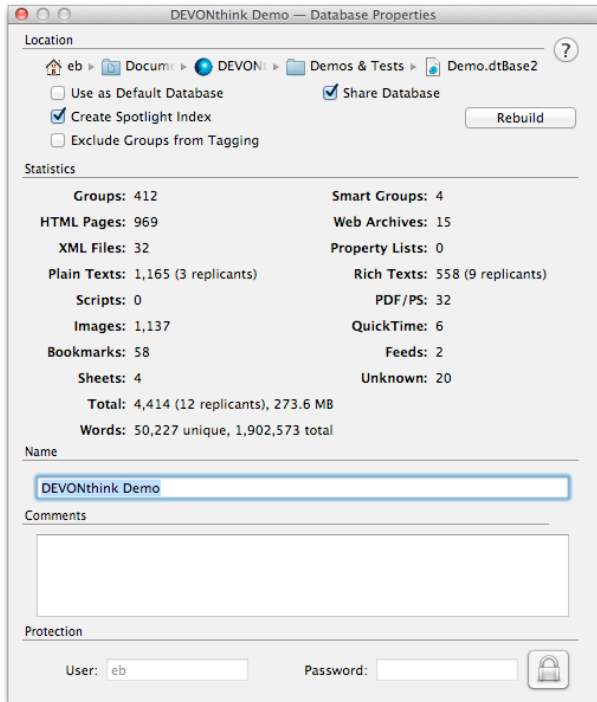
## PREFERENCES

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

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

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

**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 comments to the database representing the global inbox.

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

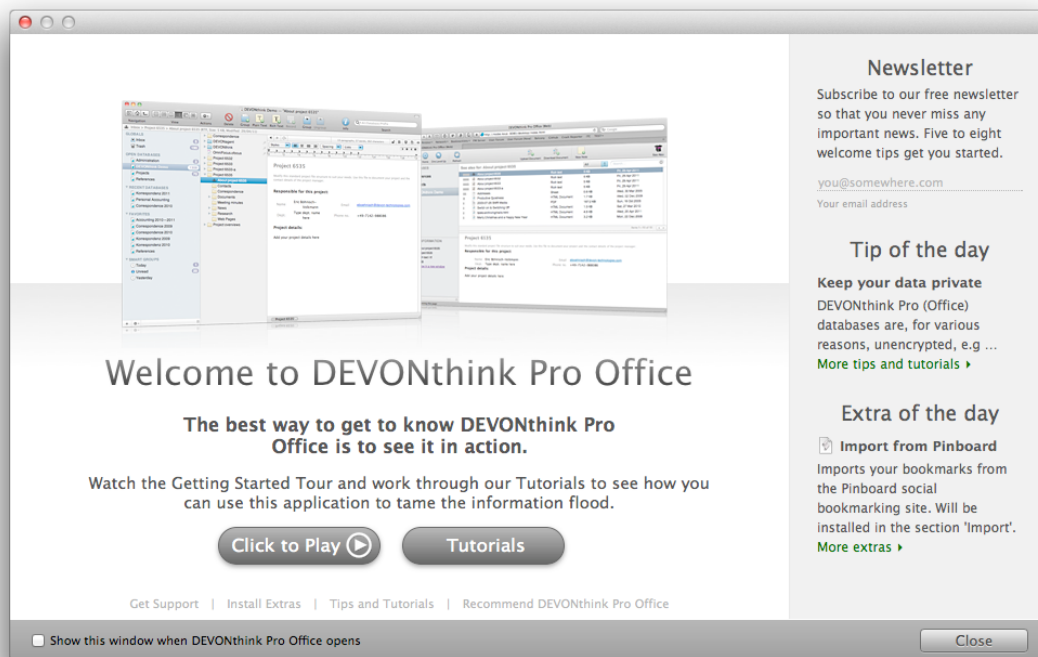
### PROTECTION

To prevent other people from opening DEVONthink Pro 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 Pro 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 a first launch assistant, tips, web and video tutorials, installable extras, and a support 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 Pro 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.

## FIRST LAUNCH ASSISTANT

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

## GET SUPPORT

The support screen guides you through the three common steps for troubleshooting DEVONthink Pro. 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 Pro. Tutorials can be slideshows describing basic tasks in DEVONthink Pro 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.

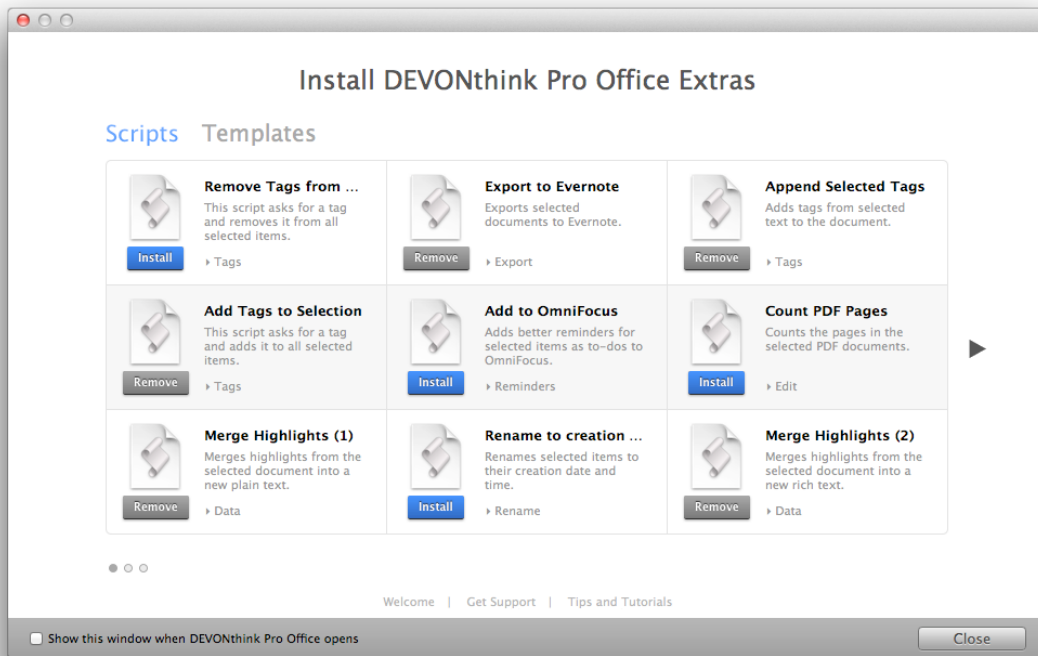
## INSTALL EXTRAS

On the extras screen, DEVONthink Pro 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 [Scripts](#) or [Templates](#) menu the extra will show up after installation. Remove installed extras with the *Remove* button.

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

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

# DOCUMENTS

## In this chapter:

General	69
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HTML pages, web pages, feeds	72
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Office documents, email, and others	77

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

Currently, DEVONthink Pro features the following view types:


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

## NAVIGATION BAR

At the top of the view/edit pane DEVONthink Pro 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 [Concordance drawer](#).
- ▶ 📄 Opens the [See also & Classify drawer](#).
- ▶ 📄 Shows a list of the most important words of the document.
- ▶ 📄 Switches the [tag bar](#) on and off.

The text-only mode can be useful 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 Pro 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  $\backslash$  or the  $\text{⌘}$  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. 118ff](#)

When you type the name of a tag, DEVONthink Pro offers automatic completion. Choose the right option with the mouse or the arrow keys and press  $\leftarrow$  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  $\rightarrow$  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.

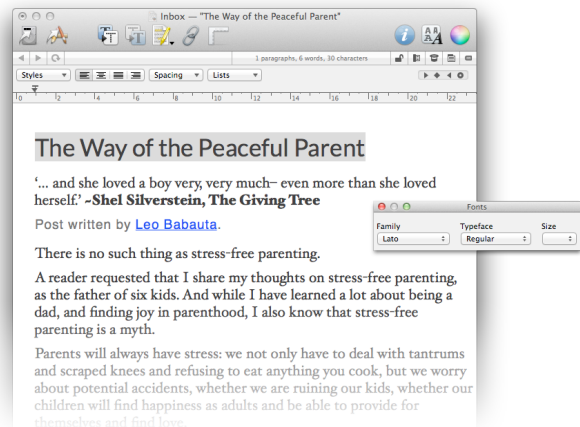
## TOOLBAR & SHORTCUTS

DEVONthink Pro 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. 118ff](#)

## PLAIN AND RICH TEXTS

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



## THE RULER

For rich text documents, DEVONthink Pro 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 occurrences of text with the displayed style in the document, click *Apply* to apply the style to selected text, or click *Done* to leave the

style editor. To add a style from your document to 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 a 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 Pro main windows, yet can be configured separately.

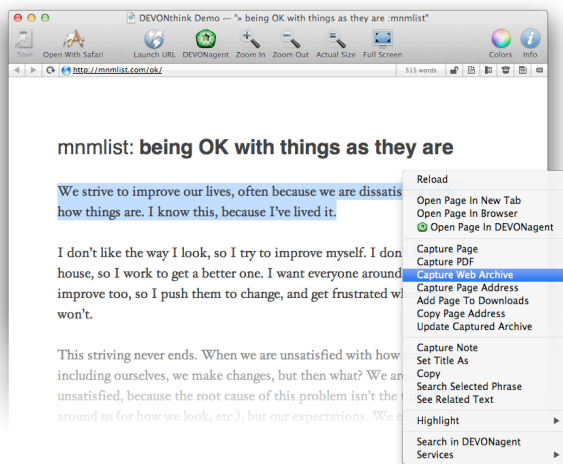
Please find a list of shortcuts in the appendix. [See also p. 118ff](#)

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

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

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

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

### 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 Pro 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. 118ff](#)

### 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.

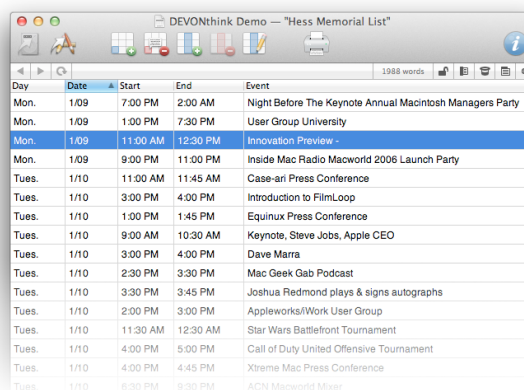
- ▶ **Capture Page Address:** Adds the URL of the current page to either the current group or to the inbox.
- ▶ **Add Page to Downloads:** Adds the URL of the current page to the [Download Manager](#).
- ▶ **Copy Frame Address:** Copies the frame URL to the Clipboard.
- ▶ **Copy Image:** Copies the image to the Clipboard.
- ▶ **Copy Image Address:** Copies the URL of an image to the Clipboard.
- ▶ **Copy Page Address:** Copies the page URL to the Clipboard.
- ▶ **Open Image in PhotoStickies:** Opens the image in [PhotoStickies](#).
- ▶ **Copy:** Copies selected text to the Clipboard.
- ▶ **Highlight:** Highlights the selection in a web archive. 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.
- ▶ **Add Link to Downloads:** Adds a link to the [Download Manager panel](#).
- ▶ **Add Page to Downloads:** Adds the page address to the [Download Manager panel](#).
- ▶ **Capture Frame:** Captures the HTML code of the frame and saves it to either the current group or to the inbox.
- ▶ **Capture Image:** Captures the selected image and saves it to either the current group or to the inbox.
- ▶ **Capture Link:** Captures the link and saves it to either the current group or to the inbox.

- ▶ **Capture Note:** Captures selected text to either the current group or to the inbox.
- ▶ **Capture Page:** Captures the HTML code of the page to either the current group or to the inbox.
- ▶ **Capture Webarchive:** Captures the page as a web archive file (including all necessary images) for offline viewing and archival to either the current group or to the inbox.
- ▶ **Update Webarchive:** Updates the contents of a web archive file with the live version on the Internet (only available in web archives).

For PDF pages, more options become available:

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

## SHEETS



Day	Date	Start	End	Event
Mon.	1/09	7:00 PM	2:00 AM	Night Before The Keynote Annual Macintosh Managers Party
Mon.	1/09	1:00 PM	7:30 PM	User Group University
Mon.	1/09	11:00 AM	12:30 PM	Innovation Preview -
Mon.	1/09	9:00 PM	11:00 PM	Inside Mac Radio Macworld 2006 Launch Party
Tues.	1/10	11:00 AM	11:45 AM	Case-ari Press Conference
Tues.	1/10	3:00 PM	4:00 PM	Introduction to FilmLoop
Tues.	1/10	1:00 PM	1:45 PM	Equinux Press Conference
Tues.	1/10	9:00 AM	10:30 AM	Keynote, Steve Jobs, Apple CEO
Tues.	1/10	3:00 PM	4:00 PM	Dave Marra
Tues.	1/10	2:30 PM	3:30 PM	Mac Geek Gab Podcast
Tues.	1/10	3:30 PM	3:45 PM	Joshua Redmond plays & signs autographs
Tues.	1/10	2:00 PM	3:00 PM	Appleworks/Work User Group
Tues.	1/10	11:30 AM	12:30 AM	Star Wars Battlefront Tournament
Tues.	1/10	4:00 PM	5:00 PM	Call of Duty United Offensive Tournament
Tues.	1/10	4:00 PM	4:45 PM	Xtreme Mac Press Conference
Tues.	1/10	8:30 PM	9:30 PM	ACN Macworld Mixer

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

Use sheets like any other document. Add new rows using *Data > Sheets > Add Record*, delete rows by selecting them and using *Edit > Delete*. Alternatively, use the contextual menu. Click a cell to edit its

content, press the *Escape* key to stop editing, and use the *Tab* or *Return* keys to navigate from cell to cell.

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

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

## TOOLBAR & SHORTCUTS

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

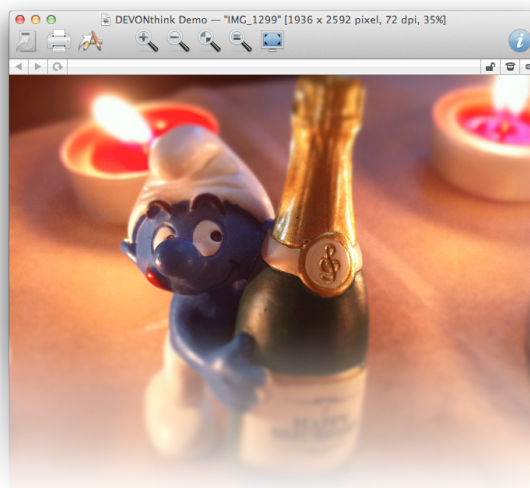
Please find a list of shortcuts in the appendix. [See also p. 118ff](#)

## CONTEXTUAL MENU

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

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

## IMAGES AND MOVIES



DEVONthink Pro 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 Pro provides a set of tools that allows you to zoom the picture to whatever zoom factor you like, or to view the image

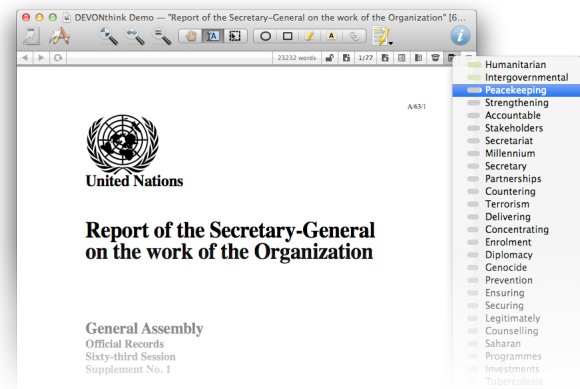
in full screen mode. Use *Open Externally* to open the image in an external editor. Movies appear with the standard QuickTime controller.

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

## 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  $\uparrow$  or  $\mathring{A}$  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.

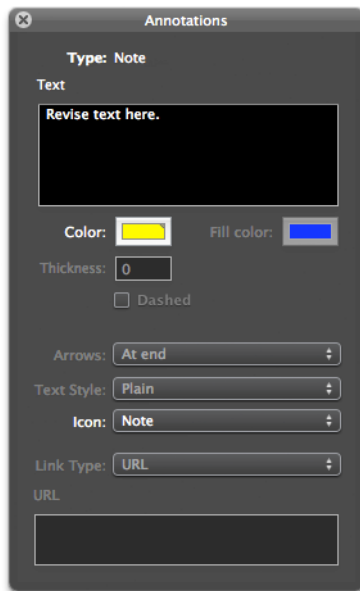
You show and hide the PDF sidebar using the *Show/Hide Sidebar* button in the PDF's [navigation bar](#).

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 Pro 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. 75ff](#)
- ▶ **Tool:** Selects the editing mode. [See also p. 75ff](#)
- ▶ **Delete Pages:** Deletes the selected pages of a PDF document.
- ▶ **OCR:** Converts the document to a searchable PDF.

Please find a list of shortcuts in the appendix. [See also p. 118ff](#)

## 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 Scroll:** When checked, DEVONthink Pro displays the pages of a multi-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.

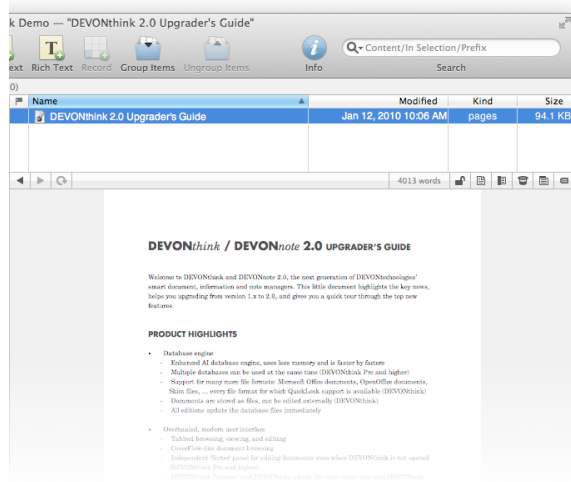
The PDF sidebar also offers commands for working with single pages:

- ▶ **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 Pro cannot render natively are displayed using QuickLook. But while you have to press the *Space* bar in the Finder to open a QuickLook head-up display, DEVONthink Pro 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 Pro 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 directly 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 Pro does not show a QuickLook preview, please contact the maker of the source application and ask them to add QuickLook support.

## TOOLBAR

For document previews based on QuickLook, DEVONthink Pro offers a number of toolbar items, e.g., for accessing the [Scripts menu](#), moving back and forth through the other documents contained in the same group or opening the document in its source application. Also you can switch to [full-screen mode](#). Use [Data > Open](#) to open the document in a separate [document window](#) instead of in its source application.

# DRAWERS & SHEETS

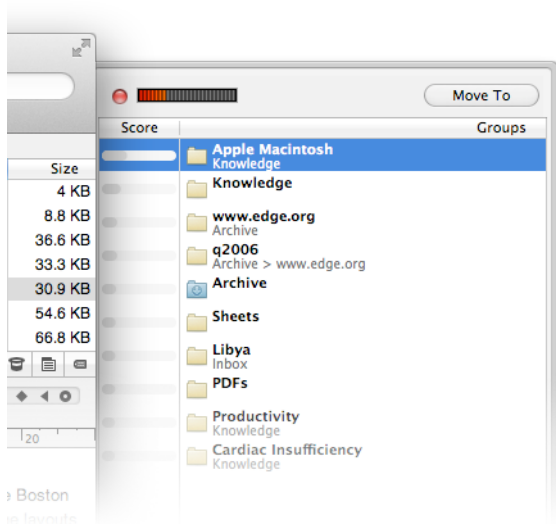
## In this chapter:

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DEVONthink Pro 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. Drawers also show concordance lists of all words contained in a document. 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 Pro analyzes the contents of the selected document and compares it to all data stored in the database. From this "knowledge," DEVONthink Pro 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 Pro 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 Pro 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  $\uparrow$  and  $\mathbb{A}$  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 Pro is about its decision. The tooltip for any entry in the list shows the full title and location for it.

To display a document in the drawer, select it. For your convenience, DEVONthink Pro 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.

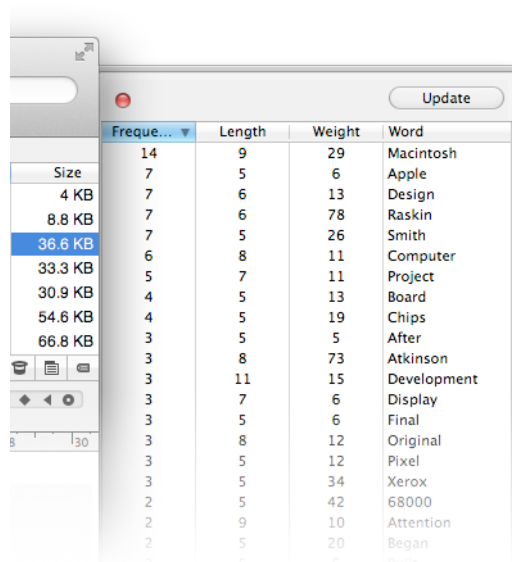
## CONTEXTUAL MENU

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).

## CONCORDANCE

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



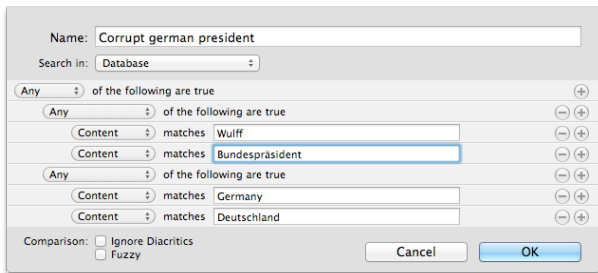
Freque...	Length	Weight	Word
14	9	29	Macintosh
7	5	6	Apple
4 KB	7	13	Design
8.8 KB	7	78	Raskin
36.6 KB	7	5	Smith
33.3 KB	6	8	Computer
30.9 KB	5	7	Project
54.6 KB	4	5	Board
66.8 KB	4	5	Chips
	3	5	After
	3	8	Atkinson
	3	11	Development
	3	7	Display
	3	5	Final
	3	8	Original
	3	5	Pixel
	3	5	Xerox
	2	5	68000
	2	9	Attention
	2	5	Began

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

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

## SMART GROUP EDITOR

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



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

- ▶ **Search in:** Select where you want this smart group to search.
- ▶ **List of search predicates:** Build your list of search criteria (in search speak: "predicates") here. See below.
- ▶ **Ignore Diacritics:** Check this to treat letters with diacritics, e.g., umlauts or accented characters, the same as their regular counterparts.
- ▶ **Fuzzy:** Check this to search "unsharp" 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. 126ff](#)

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

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

## PREDEFINED SMART GROUPS

When you create a new database, DEVONthink Pro 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.

By default, the following smart groups are added to the [sidebar](#):

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

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

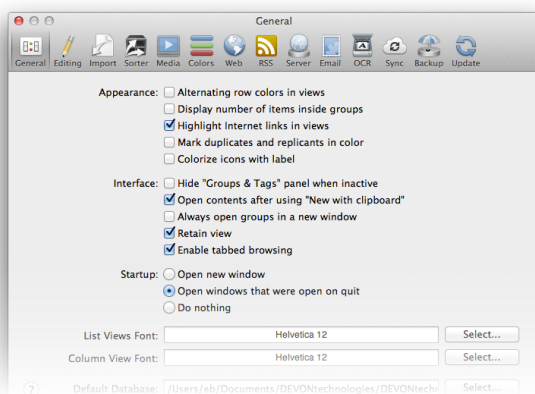
# PREFERENCES

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

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

## FONTS

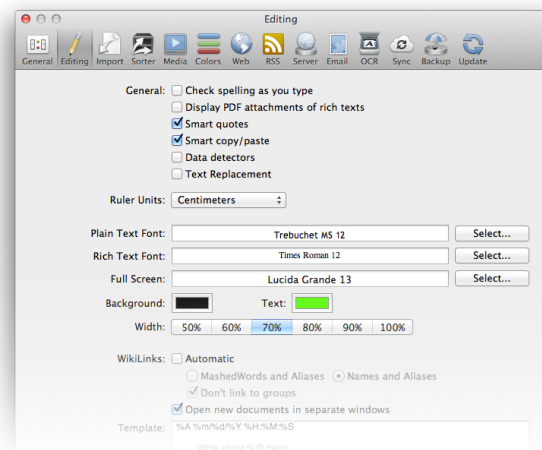
Use *List Views Font* and *Column View Font* to set the font DEVONthink Pro uses for displaying item lists in list and column views.

## DEFAULT DATABASE

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

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

## EDITING



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

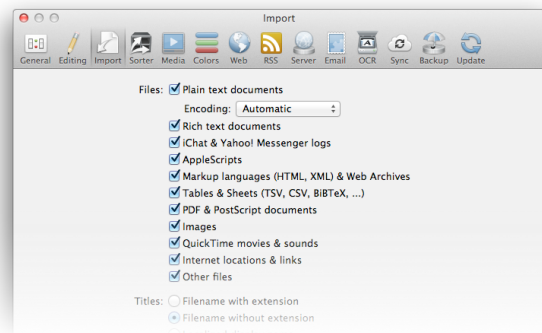
- ▶ **WikiLinks:** Check *Automatic* if you want to make every word that is also the name of another document or group in the database automatically link to the document of the same name (WikiLink). This mechanism can be restricted to not link to groups, as well as to only accept meshed words. (For example, 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 Pro to calculate summaries from sentences or from whole paragraphs.

## IMPORT



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

## FILES

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

## TITLES

Select how you want DEVONthink Pro 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

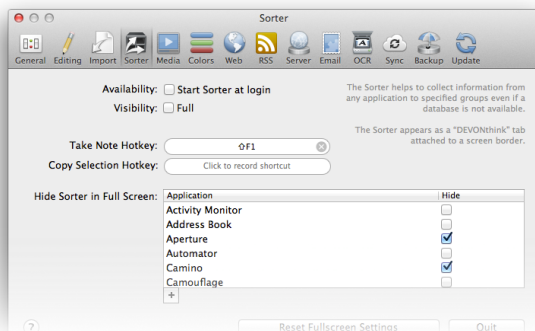
Check *Select (and display) automatically* to automatically select and display the last note you have taken.

## DESTINATION

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

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

## SORTER



The Sorter preference allows you to assign a hotkey for capturing a selection into the inbox of the Sorter, as well as a hotkey for taking a new note, showing the Sorter at login, and starting or quitting the Sorter manually. [See also p. 29ff](#)

## 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.

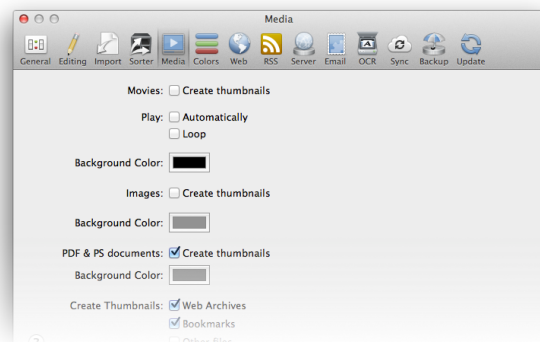
## HIDER SORTER IN FULL SCREEN

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 Pro "forget" all remembered applications.

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

## MEDIA



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

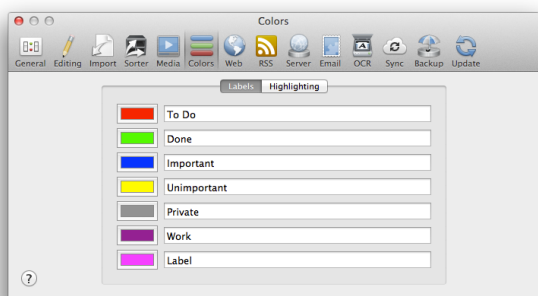
The following options are available:

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

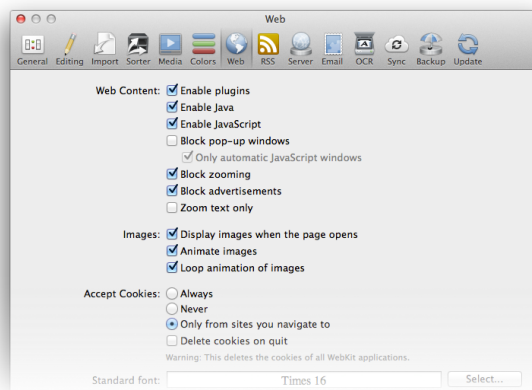
- ▶ **Images:** Check *Create thumbnails* if you want DEVONthink Pro to create thumbnails for imported or indexed images. Check *Generate from actual image* to ignore thumbnails embedded into the image files and let DEVONthink Pro generate the thumbnails from the actual image. Choose a background for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

## COLORS



Here you can name and choose the seven label colors DEVONthink Pro 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 Pro's displays [web documents](#) and "live" web pages.

### WEB CONTENT

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

- ▶ **Display images when the page opens:** Check this option to display 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 Pro.

## FONTS

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

## STYLE SHEET

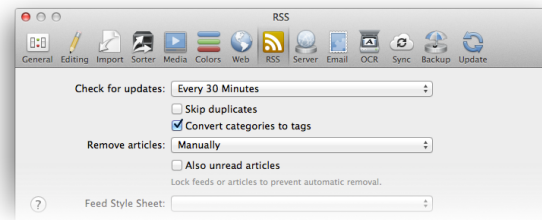
You can further control the way DEVONthink Pro displays web pages by applying a CSS style sheet that changes the rendering on the fly.

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

## RSS



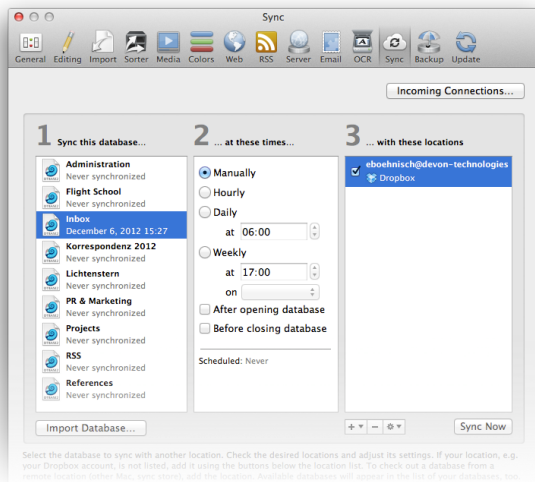
DEVONthink Pro comes with built-in RSS capabilities that enable you to add RSS feeds to your database and have DEVONthink Pro update them automatically.

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

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

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

## SYNC



DEVONthink Pro allows you to keep multiple copies of your databases 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.

## DATABASES

The first column lists all open database and includes information about when a database was last synchronized with any location. When you select a database, the next two columns will show when and with which locations the database will be synchronized.

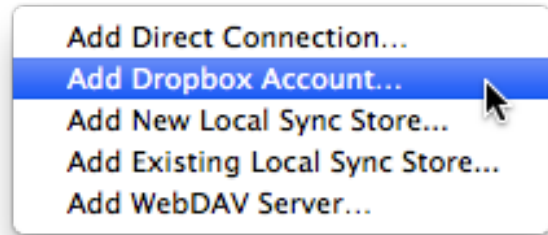
## SCHEDULE

The second column at which times you want to synchronize the selected 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 Pro shows you when the database will be next synchronized according to the chosen schedule.

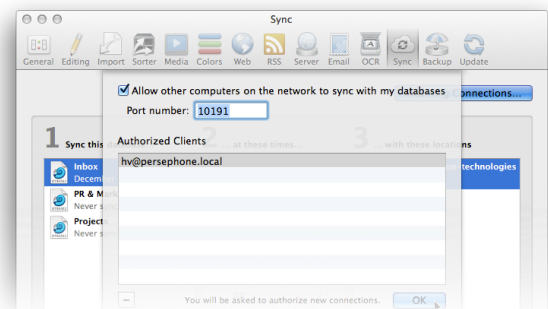
## LOCATIONS



The third column lists all [locations](#) you have defined. Check all locations that you want to synchronize the selected 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

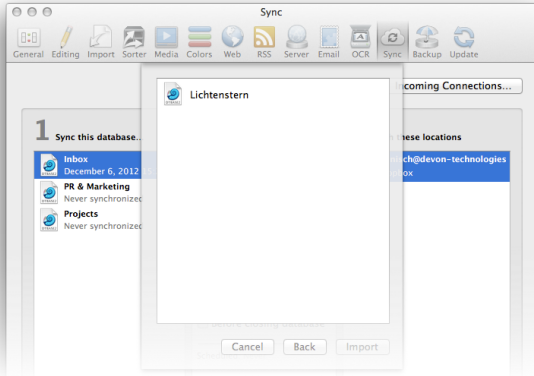
Click the button *Incoming Connections* to define whether other DEVONthink users on your network can synchronize with your instance of DEVONthink Pro. In the dialog sheet that appears, check *Allow other computers on the network to sync with my databases* to allow other users access. Enter a port number on which DEVONthink Pro 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 Pro before. If another user wants to connect to your machine, DEVONthink Pro will generate a random PIN on your screen that the user has to enter on his/her screen. This ensures that

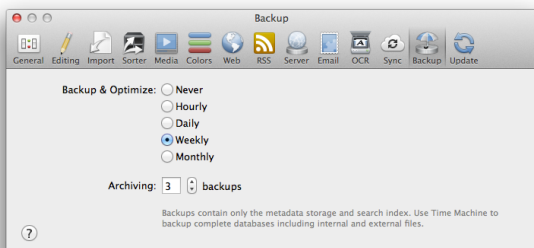
only persons authorized by you can synchronize with your databases. Select a listed client and click the - button to withdraw the authorization.

## IMPORT DATABASE



Use the *Import 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 *Import*.

## BACKUP



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

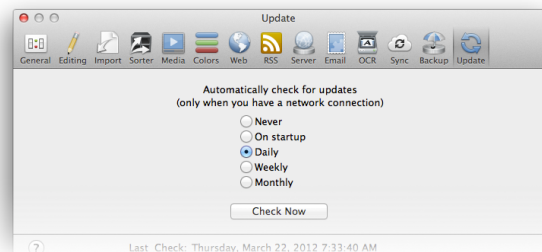
The backup automatically duplicates all important database files and moves the duplicates into a folder(s) named "Backup(.x)" within the

DEVONthink Pro 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 Pro 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.

DEVONthink Pro also comes with a number of handy scripts that export your database as files and folders (independent from DEVONthink Pro). [See also p. 91ff](#)

## UPDATE



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

# SCRIPTS

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

## INTRODUCTION

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

## EXAMPLE SCRIPTS

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

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

## INTEGRATING OTHER APPLICATIONS

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

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

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

To activate the global script menu, do the following:

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

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

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

## DEVONTHINK PRO'S DICTIONARY

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

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

## CACHING

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

## LEARNING APPLESCRIPT

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

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

## INSTALLATION

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

The scripts are installed in a number of locations:

- ▶ **Application Scripts:** These scripts are installed in "~/Library/Scripts/Applications/" and can be used from the global script menu. [See also p. 93ff](#)
- ▶ **DEVONthink Pro Scripts:** These scripts are installed in "~/Library/Application Support/DEVONthink Pro/Scripts" and can be used from DEVONthink Pro's own script menu. [See also p. 90ff](#)
- ▶ **PDF Services Scripts:** These scripts are installed in "~/Library/PDF Services/". They extend the *PDF* button in any application's print dialog. [See also p. 96ff](#)

## INTERNAL SCRIPTS

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

More scripts are available as extras. [See also p. 68ff](#)

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

Note: If you have modified the contents of the script menu and want to go back to the default set, delete the Scripts folder in "~/Library/Application Support/DEVONthink Pro/". DEVONthink Pro will recreate this folder, including its content, the next time you launch the application.

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

## COMMENTS

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

## DATA

- ▶ **Convert to Tags:** Converts the tag contained in the comments field to real tags if the comments field of the selected document contains tags separated by commas. [See also p. 118ff](#)
- ▶ **Move Duplicates to Trash:** Moves all duplicates of the selected document to the trash.
- ▶ **Find & Remove Similar Contents:** Finds and removes similar documents.
- ▶ **Group With Duplicates:** Creates a group with duplicates of the selected documents.
- ▶ **Group With Replicants:** Creates a group with replicants of the selected documents.

## DATES

- ▶ **Creation > Modification Date:** Sets the modification date of the selected items to their creation dates.
- ▶ **Modification > Creation Date:** Sets the creation date of the selected items to their modification dates.
- ▶ **Touch Creation Date:** Sets the creation date and time of the selected items to the current date and time.

## DOWNLOAD

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

## EDIT

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

## EXECUTE

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

## EXPORT

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

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

## FEEDS

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

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

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

## FORMAT

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

## IMAGES

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

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

## IMPORT

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

- ▶ **Astronomy Picture of the Day:** Imports the Astronomy Picture of the Day.
  - ▶ **References from Bookends:** Imports multiple references from Bookends into a newly created group named "Bookends". Already imported references are updated (requires Bookends 11.3.5 or later).
  - ▶ **Daily Dilbert:** Imports the Daily Dilbert.
  - ▶ **Del.icio.us:** Imports your [del.icio.us](http://del.icio.us) bookmarks. The descriptions are used to name the imported bookmarks; the notes and the tags are added to the comments. If the keychain does not contain a key for del.icio.us, dialogs pop up allowing you to enter the user name and password.
  - ▶ **EverNote file (.enex):** Imports notes exported from [Evernote](http://Evernote) in Evernote's exchange format (.enex). Notes are stored as HTML files with formatting; images and attachments are not imported; tags are honored.
  - ▶ **Man Page:** Imports a UNIX manual page as a PDF document.
  - ▶ **Mars Explorer Rover Mission Im.:** Imports Mars Explorer Rover Mission Images.
  - ▶ **Perldoc:** Imports the documentation of Perl pages, modules, functions, or programs.
  - ▶ **Phone List:** Imports all phone numbers from Apple Address Book.
- The following scripts import chatlogs and call logs from popular instant messaging clients as well as from your mobile phone:
- ▶ **Adium Chatlogs:** Imports all your chatlogs from the [Adium](http://Adium) instant messaging client, converts them to readable HTML, and stores them in your database. The Mac OS X Address Book is used to resolve instant messaging account names if possible.
  - ▶ **iChat Chatlogs:** Imports your iChat chatlogs.
  - ▶ **Second Life Chatlogs:** Imports your [Second Life](http://Second Life) chatlogs.

## REMINDERS

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

## RENAME

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

## SHEETS

Even though DEVONthink Pro is not a spreadsheet application, it does have scripts that implement basic sum and mean value functionality for sheets.

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

- ▶ **Check sums in last column:** Checks the sums in the last column on validity.

## TOOLBAR

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

## THUMBNAILS

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

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

## ABOUT THIS MENU

Shows an information dialog window about the Scripts menu.

## BROWSERS, EMAIL, RSS READERS

AppleScript is perfectly suited for integrating different applications, interchanging information, and creating workflows. DEVONthink Pro comes with a number of scripts that copy information from other applications, like Safari or Mail, to DEVONthink Pro. You may use these scripts as a template for connecting DEVONthink Pro to your own applications.

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

Note: The application-specific scripts (put into sub-folders of "~/Library/Scripts/Applications") appear only within the application they were

designed for ([see introduction](#)). To see them, activate their designated application, e.g., by bringing one of its windows to the front. The other scripts are located in a sub-menu named "DEVONthink Pro".

## DEVONAGENT, CHROME, OMNIWEB, AND SAFARI

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

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

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

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

## EMAIL APPLICATIONS

Note: If you are interested in pro-grade email archiving, please also look at [DEVONthink Professional Office](#) that comes with far more advanced email archiving functions than DEVONthink Professional.

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

DEVONthink Pro provides the following scripts:

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

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

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

## RSS NEWS READER

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

## OTHER SCRIPTS

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

- ▶ **Copy Selection:** Copies the selected text and creates a new plain text document in the [default destination](#).
- ▶ **Link to current document:** Indexes the front-most document (for example, a PowerPoint presentation or an Excel spreadsheet) and places the indexed document in the [default](#)

[destination](#). This is handy when you are working on a document and want to quickly place a reference to it in DEVONthink Pro.

## TRIGGERED SCRIPTS

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

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

### ATTACHING A TRIGGERED SCRIPT

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

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

### REMOVING A TRIGGERED SCRIPT

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

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

## DROPLETS, FINDER PLUGINS, MAIL RULES, PDF SERVICES

### DROPLETS

Droplet are little AppleScript applications that allow you to run actions based on files or folders dropped onto them. You can create them easily using the AppleScript editor; some useful examples come

with DEVONthink Pro on the disk image in "Extras/Scripts/Droplets". Basically, droplets do what their name suggests:

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

**Using droplets:** Place a droplet anywhere you like and optionally drag it to the *Dock*. Then, drag files and folders onto the droplet icon in the Finder or the Dock to trigger desired action.

### FOLDER ACTIONS

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

- ▶ **DEVONthink – Import:** Imports files into your databases.
- ▶ **DEVONthink – Import & Delete:** Imports files into your database, and moves the files to the trash afterwards.
- ▶ **DEVONthink – Import to selected group:** Imports files to the currently selected group.
- ▶ **DEVONthink – Index:** Adds references to the files to your database.
- ▶ **DEVONthink – Index to selected group:** Adds references to the files to the currently selected group.

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

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

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

## MAIL

Using rules in Apple Mail you can automatically process incoming messages, e.g., move them to another mailbox or mark them as read. In addition you can process them with scripts that archive them or their attachments in your database, etc., (and add the email address of the sender to the URL field of the created document). DEVONthink Pro provides the following scripts:

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

To use these scripts, do the following:

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

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

## PDF SERVICES

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

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

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

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

- ▶ Then, select the destination group for the document, if necessary, and click *OK*.

Note: This requires an installed printer to work properly.

## MORE EXAMPLES

Some of these scripts do things that have already been implemented as "real" commands in DEVONthink Pro; others are functions you will seldom use. These scripts are intended as examples, yet all can be of real use.

- ▶ **Create Contacts:** Copies all entries of the Mac OS X Address Book to DEVONthink Pro, like [File > Import > Addressbook](#).
- ▶ **Cross-linked Text:** Links selected text to currently visible document. Demonstrates how to programmatically add links to a rich text document.
- ▶ **Export daily backup as files & folders:** Exports all items of the database as files and folders as a daily backup.
- ▶ **Export to iPod:** Exports selected documents as notes to an attached iPod (3rd Generation or later), like [File > Export > to iPod](#).
- ▶ **Export to OPML:** Exports selected documents as OPML file, like [File > Export > as Outliner Processor Markup Language](#).
- ▶ **Fancy Text:** Demonstrates some of the rich text scripting capabilities of DEVONthink Pro.
- ▶ **Import Feed:** Demonstrates how you can access RSS feeds from DEVONthink Pro via AppleScript.
- ▶ **Latest Macintosh News:** Downloads the latest news from a number of RSS feeds and stores them in the database.
- ▶ **Merge:** Merges multiple selected document to one long document, like [Data > Merge](#).
- ▶ **Move to Done:** Moves the selected item(s) to the group Done in the top level of the database.
- ▶ **Open In PhotoStickies:** Opens selected images in [PhotoStickies](#).
- ▶ **Open In Preview:** Opens selected images in Preview.
- ▶ **Prepare Backup:** Creates a backup of the database at a chosen location (like the Desktop), and makes it a Zip archive that can be easily copied to an external medium, an online drive, or a writable disc.

- ▶ **Quick Look:** Opens a Quick Look head-up-display window for the selected item.
- ▶ **Show recommended groups:** Shows the groups recommended by DEVONthink Pro's artificial intelligence for the selected document.
- ▶ **Synchronize:** Triggered script that synchronizes the item it is attached to each time it is viewed. Can be used to keep a group synced with its counterpart in the file system.

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

## AUTOMATOR

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

To see which actions DEVONthink Pro provides, open a new workflow in Automator and click the Actions button, then search for DEVONthink Pro in the Library. Automator then displays all actions contained in the application. Select any action to show a short description about what the action does.

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

## OVERVIEW

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

## FILE MANAGEMENT

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

**Move existing files:** You have a folder with files that you think are in control by DEVONthink Pro, but you want to move the files in the database to a different folder (let's say "Archive"). This workflow will solve this problem for you. For the given files/

directories, it will find all files, and ask the database if items exist with these paths. For the ones that are found to exist, move these to a specified folder.

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

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

**Add and move missing files:** Find out what files are not in the database by changing the value in the *Filter Items* to *Missing* in the previous workflow. Then the *Move Finder Items* action places these files in their rightful place in the folder hierarchy. These files will be sent to the *Add Items to Current Group* action after setting the destination group; this will index the files into the database.

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

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

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

- ▶ **Step 9:** Get the file paths from these records.
- ▶ **Step 10:** Open the external files in the Finder.  
You're ready to start working!

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

## WEB MANAGEMENT

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

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

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

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

**Gather Information from Safari:** The next two workflows are not great for our bottom line, yet we've decided to present these helpful hints free of charge!

The first in the series is a script that gets all the links (within the domain of the starting page) from Safari's open web pages and puts them into a special group called "Temporary Safari Links". For each entry in this group, you can see its status. The contents will be indexed (so loading these may take a while).

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

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

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

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

## OTHER WORKFLOWS

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

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

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

**Add in Finder:** Save this workflow as a Finder plugin and you can import a file selection from the Finder into a group that you select in an open database. You should remove the first action and name it "Add to DEVONthink Pro". Then you will see it in the Finder's contextual menu in *More > Automator*.

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

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

**Open DEVONthink Spotlight Item:** Use this workflow to open the selected DEVONthink items listed by a Spotlight search in the appropriate native applications.

## APPLESCRIPT-BASED WORKFLOWS

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

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

# TROUBLESHOOTING

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DEVONthink Pro 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 Pro and try again. If 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 databases 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 the database in question 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 Pro 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 Pro 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 Pro 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 Pro 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 Pro 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 Pro keeps in the [Preferences, Backup tab](#).

To restore the index file(s) from a previously saved internal backup, use [Tools > Restore Backup](#). DEVONthink Pro 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 Pro 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 Pro's index are stored independently within the database package the index can be rebuilt at any time without you losing too much metadata. To rebuild the database from scratch, use [Tools > Rebuild Database](#).

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

- ▶ Quit DEVONthink Pro.
- ▶ Move ~/Library/Application Support/DEVONthink Pro 2/Inbox.dtBase2 to the Desktop.
- ▶ Open the moved database by double-clicking on it
- ▶ Rebuild the global inbox database.
- ▶ Move everything from the moved database to the now empty global inbox.
- ▶ Quit DEVONthink Pro, delete the moved database.

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

**Orphaned files:** Orphaned files that could not be imported while repairing are logged and moved to the folder "Orphans" inside the database package. To access the contents of the package, show the

database package in the Finder, right-click it, and choose *Show package contents* from the contextual menu. Move the files in the "Orphans" subfolder to a save location, e.g., the Desktop, or directly re-import the files by dragging them to DEVONthink Pro's Dock icon. Please do not change anything here except for rescuing the orphaned files.

#### STEP 4: TIME MACHINE OR MANUAL RESCUE

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

- ▶ **Option 1:** Restore your database from your [Time 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 database package in the Finder, right-click it, and choose *Show package contents* from the contextual menu. 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 PRO CRASHES WHEN OPENED

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

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

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

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

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

## RECOVERING A LOST PASSWORD

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

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

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

## ITEMS KEEP RE-APPEARING IN THE INBOX

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

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

## PROBLEMS IMPORTING FILES

### WHY DOES DEVONTHINK PRO NOT RECOGNIZE MY FILES?

If DEVONthink Pro does not recognize a file, make sure the file has a proper file name extension. DEVONthink Pro 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 PRO 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 Pro will be able to display the document if you can display the file also, e.g., in the Finder by pressing the *Space* bar.

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

DEVONthink Pro 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 Pro, 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 Pro 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 Pro 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 PRO BEHAVES IRRATIONALLY

No software on this planet is bug-free, and if an application behaves irrational there is a good chance that you 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 browser'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 Pro'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 Pro or if it the file itself.

#### **STRANGE BEHAVIOR OF TABS**

With Zoom/2 installed, tabs in tabbed windows behave strangely, e.g., close when cursor hovers over the tab. Another effect of Zoom/2 are scrolling problems in programs such as iTunes. Disabling Zoom/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 Pro?

## GENERAL QUESTIONS

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

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

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

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

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

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

## RELEASE SCHEDULES, MAC OS X, AND WINDOWS

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

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

- ▶ responding to customer requests,

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

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

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

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

## PURCHASING

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

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

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

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

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

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

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

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

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

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

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

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

## MAC APP STORE

**How do apps purchased in the Mac App Store differ?** The Mac App Store requires so-called "sandboxing" of all apps. Sandboxing puts the apps into a closed environment and restricts access to e.g. files, networks, printers, etc. Therefore many apps sold through the Mac App Store have less features than their counterparts available outside of the Mac App Store.

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

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

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

**Do you offer bundles in the Mac App Store?** No, bundles are not supported by the Mac App Store.

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

**Can I get a refund?** We freely refund licenses purchased in our own shop. For apps purchased in the Mac App Store we don't have access to the refund mechanism. Please contact Apple's Mac App Store support for a refund.

## YOUR SOFTWARE LICENSE

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

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

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

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

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

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

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

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

## PRODUCT-RELATED QUESTIONS

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

- ▶ [FAQ specific to DEVONthink Pro](#)
- ▶ [Troubleshooting 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, statistics, 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](http://www.devontechnologies.com).

# OTHER PRODUCTS

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Besides DEVONthink Pro, 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 Pro & 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 Pro, 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 Pro.

### KEYBOARD SYMBOLS

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

### INTERFACE ELEMENTS

- ▶ **Contextual Menu:** The menu that appears when you right-click (or ⌘-click) something; the contextual menu gives you access to frequently used commands that deal directly with the clicked object. Read more about the available contextual menus in the [Documents](#) and [Windows](#) chapters.

- ▶ **Item list:** A list of items stored in the database. Items can be [documents, groups, or smart groups](#).
- ▶ **View/Edit Pane:** A part of the DEVONthink Pro [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. 52ff](#)
- ▶ **View (1):** The layout for a DEVONthink Pro [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. 69ff](#)
- ▶ **Window:** DEVONthink Pro 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 Pro. You can create and open as many databases as you like.
- ▶ **Document:** A file in the database; for example, a plain or RTF text, a PDF, or an image (.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. Set in [Preferences](#), [Import tab](#).
- ▶ **Group:** A collection of documents or other groups inside the database. Similar to a folder in the file system. [See also p. 38ff](#)
- ▶ **Global Inbox:** A special database serving as a destination for incoming data. The Global Inbox is always opened when DEVONthink Pro is started and accessible through the [sidebar](#).

- ▶ **Inbox:** A special group for data coming in to a database. The inbox can be set as the default destination in [Preferences, Import tab](#).
- ▶ **News Feed:** A news feed is like a web page, but 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 Pro 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 Pro tries to add it as a proper feed document if possible. DEVONthink Pro 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. 40ff](#)
- ▶ **Sheet:** A collection of records; structured sets of data, like a spread sheet and presented in a [table view](#). You can use sheets to store addresses or list items, etc. [See also p. 73ff](#)
- ▶ **Smart group:** Not a real group but a "saved search" that appears like a group. Every time you visit this smart group, DEVONthink Pro runs the attached search and displays it as the content of the group. Create smart groups using the [search window](#) or

the [smart group editor](#). DEVONthink Pro 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 Pro > 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. 117ff](#)

## FAQ (PRODUCT-SPECIFIC)

### GENERAL

**What is the difference between the various editions?** While all three editions of DEVONthink, as well as DEVONnote, share many features, there are some noticeable differences. For instance, DEVONthink Pro is able to deal with more than one database; features tables, forms, and categories; and comes with full AppleScript support. 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 Pro support?** DEVONthink Pro 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 Pro?** To completely remove DEVONthink Pro from your Mac, see the instructions in the [Read Me](#).

## DATABASES

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

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

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

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

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

Note: In general, DEVONthink Pro 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 Pro application before copying or moving a database, as copying an open database may result in an incomplete or damaged copy.

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

**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. 25ff](#)

## 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.

**Is everyone using the same global inbox?** Yes, everyone synchronizing with the same sync store uses the same synchronized global inbox. When you synchronize for the first time, new items in the inbox are downloaded from the sync store and the items in your inbox are transferred to the sync store. The local inboxes in each database are only shared with persons synchronizing this database.

**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 Pro 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 Pro databases updated. To share data with people using Windows- or Linux-PCs, consider using

**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

## 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. 40ff](#)
- ▶  Item is indexed, not imported [See also p. 24ff](#)
- ▶  Item is locked [See also p. 40ff](#)
- ▶  Item has a comment [See also p. 61ff](#)
- ▶  Item has a script attached [See also p. 95ff](#)
- ▶  Group is a tag, too [See also p. 118ff](#)
  
- ▶  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 Pro much more efficient. Some of the following shortcuts are common to most OS X applications; others are only available in DEVONthink Pro. 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  $\uparrow$  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 contained 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 Pro with  $\text{⌘}$  and  $\text{⌥}$  pressed indexes the item. Dragging items into documents with  $\text{⌘}$  and  $\text{⌥}$  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).
- ▶ **Option-click (2):** Adds clicked URL to the [Download Manager](#).

## 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).
- ▶ **Option-click:** Adds clicked URL to the [Download Manager panel](#).
- ▶ **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 Pro supports tagging in a way that makes groups and tags interchangeable. While this concept may sound a bit strange at first, you will soon discover why it is a smart way to approach tags and group and to bring both together.

## INTRODUCTION

Technically, tags and groups are identical: both are simply entries in a table that are somehow "attached" to an item, usually a group or document. The difference is that tags are visualized as "labels

attached TO the item while groups are visualized as groups CONTAINING the item." They are presented differently, but internally they are the same.

DEVONthink Pro 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 Pro'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. 114ff](#)

## THE TAGS GROUP

Every DEVONthink Pro 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 Pro 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 Pro offers the following options:

- ▶ **Tags view:** The tags view allows you to browse your documents by tags. In the tags view, select a tag to display all items which have this tag assigned. Choose multiple tags, e.g., by clicking another one with ⌘ held, 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 Pro 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 Pro 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 Pro supports a variety of text and image formats, including plain text, Rich Text Format (RTF), PDFs, all image formats supported by Mac OS X and QuickTime, as well as all file formats for which a Quick Look preview is available.

### TEXT FILES

DEVONthink Pro supports plain text files (as well as Mac OS 9 SimpleText and Tex-Edit Plus files) in all encodings supported by Mac OS X, including Unicode and UTF-8. By default, DEVONthink Pro 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 Pro also recognizes plain text file formats defined by third-party applications.

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

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

- ▶ **Extensions:** rtf, rtfcd
- ▶ **HFS type codes:** RTF

## OFFICE AND OTHER DOCUMENTS

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

Note: Quick Look is Mac OS X 10.5's mechanism for displaying a preview of almost any file type. In the Finder, this function is invoked by pressing the *Space* bar. Quick Look requires the maker of the software that writes the document to add additional preview information inside the file (package), or to provide a Quick Look plugin embedded into the application itself or installed in a Library folder. If neither DEVONthink Pro 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 Pro 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, ichtat
- ▶ **HFS type codes:** YMSG

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

## PDF, POSTSCRIPT, SKIM

DEVONthink Pro imports and displays Portable Document Format (PDF) files, Skim PDF packages, and PostScript files. DEVONthink Pro 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 Pro after entering the correct password.

## BOOKMARKS

Drag or paste Internet addresses from any Internet application, or Internet location files from the Finder, to DEVONthink Pro to create a bookmark documents. DEVONthink Pro is especially optimized to accept Safari Bookmarks. Use bookmarks in DEVONthink Pro 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 Pro supports the standard HTML transcriptions for special characters (for example German umlauts and French accents). HTML can also be converted to plain text using [Data > Convert](#). XML files of any kind can also be imported and are displayed with syntax coloring. Preference property lists of Mac OS X 10.4 and higher are stored in a binary format and are converted on-the-fly to readable XML.

Also, DEVONthink Pro 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 Pro also recognizes HTML and XML file formats defined by third-party applications.

## TABULAR DATA

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

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

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

## OUTLINER FORMATS

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

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

- ▶ **Extensions:** .opml

## IMAGE FILES

DEVONthink Pro 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 Pro as well.

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

## MULTIMEDIA FILES

DEVONthink Pro displays or plays [QuickTime](#) movies, sounds, [Flash](#) movies and [Shockwave](#) animations. To add movies, sounds, or MP3s to

## TEMPLATES

DEVONthink Pro 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 Pro 2/Templates.noindex". Navigate to this folder in the Finder to manage your templates, rename them, organize them in sub-folders, or delete them.

More templates are available as extras. [See also p. 68ff](#)

### PRE-FABRICATED TEMPLATES

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

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

#### General use:

- ▶ **Annotation:** Adds an annotation for a selected document. The annotation is placed next to the selected document (and replicated to all other instances of the document if necessary) and contains a link to the annotated item. If possible, this template links to the current page of a PDF document. If there is already an annotation for the selected document, a second one is not created, but the existing annotation is opened.
- ▶ **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.
- ▶ **Project:** Adds a simple project group structure including an "About this project" document. The smart template asks for a project name; retrieves your name, department, email address, and phone number from your address book card; and adds this information to the "About this project" document.
- ▶ **Task List:** Adds a simple task list.
- ▶ **Web Browser:** Adds an HTML document that allows you to use DEVONthink Pro 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 many 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.

Tabs:

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

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

## TEMPLATE PACKAGES

Besides the more complex smart templates, DEVONthink Pro 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 Pro 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.

## CREATING SMART TEMPLATES

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

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

To make your own smart templates, have a look at the prefabricated smart templates:

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

Each of the prefabricated smart templates demonstrate other aspects that show what you can do with them. You can find more about AppleScript and DEVONthink Pro in the chapter [Scripts](#).

Smart templates, as well as template packages, can be installed via the Finder by double-clicking on them.

## WEB SITE EXPORT TEMPLATES

For exporting information as web site, DEVONthink Pro uses templates available in ~/Library/Application Support/DEVONthink Pro/Websites/ to

create HTML files from documents. You can choose the template in the save dialog that appears when you use [File > Export > as Website](#)

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

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

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

## SEARCH OPERATORS

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

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

### CASE

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

### PRECEDENCE OF TERMS

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

### WILDCARDS

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

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

### BOOLEAN OPERATORS

The operators (often called Boolean operators) are words or symbols that establish logical rules for the terms in the search query. If no operator is given, DEVONthink Pro 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 Pro 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 Pro you can create new documents by first selecting some text in a rich text document and then making it a link using the [contextual menu](#). When you then click this link, DEVONthink Pro 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. 41ff](#)

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

## METADATA

DEVONthink Pro 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 addresses
- ▶ Email addresses

Electronic publications:

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