

# DEVONthink

VERSION 3.0

DOCUMENTATION

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# GETTING STARTED

## IN THIS CHAPTER

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Welcome to DEVONthink, a powerful assistant in your quest to organize many kinds of information. From recipes to your dissertation, hobbies to health, for work or home, DEVONthink can help you gather, organize, and connect your data. This manual will help get you familiarized with DEVONthink's concepts, interface, and options. We begin with simple overviews, move into descriptions of the essential controls, then conclude with the deepest details in the appendix.

Note this manual is meant as a handy reference, not as a series of mandates on how you must use it. DEVONthink can be used very simply or in very complex ways and each person brings their own personal approach to using it. To that end, this document can't be an exhaustive guide to everything you could ever do with it. With the flexibility and capabilities built-in, that would be an impossible task. We hope you find this guide helpful.

**Note:** Text in blue color (besides hyperlinks that might get colored in blue by your ebook reader) refers to functionality only

available in higher editions. You can find a list of the [editions and their features](#) online.

Warmest Regards, The DEVONtechnologies Team

Now let's get into it...

## INSTALLING, UPDATING, UNINSTALLING

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

### INSTALLING

If you haven't already installed DEVONthink, here are the easy steps to accomplish that:

- Download an installer from the [Download](#) page.
- If your browser isn't set to open safe downloaded files, double-click the ZIP file to decompress it. You will see a disk image file.
- Double-click the disk image to open it.
- Drag and drop the application from the disk image to the Applications folder shortcut.
- After the application has copied, press ⌘E to eject the disk image.

Note: Please note that macOS Services and the connection to [DEVONagent](#) work only for applications installed into the *Applications* folder, and that logout and login or a restart is suggested after installation to make all parts of macOS aware of the additional services that come with DEVONthink.

## UPDATING

Updates to DEVONthink are done per the schedule set in [Preferences > General > Check for Updates](#).

If you need to manually update the software, follow the previous installation instructions, but allow the Finder to overwrite the old version. Your database(s) will not be affected. To avoid any potential problems, do not use a third-party uninstaller utility. Just replace the current version, as directed.

**App Store to Free-World Conversion:** If you purchased DEVONthink in the Mac App Store you can also download the update from the [Download](#) page. It will retrieve the existing receipt and accept it as valid license.

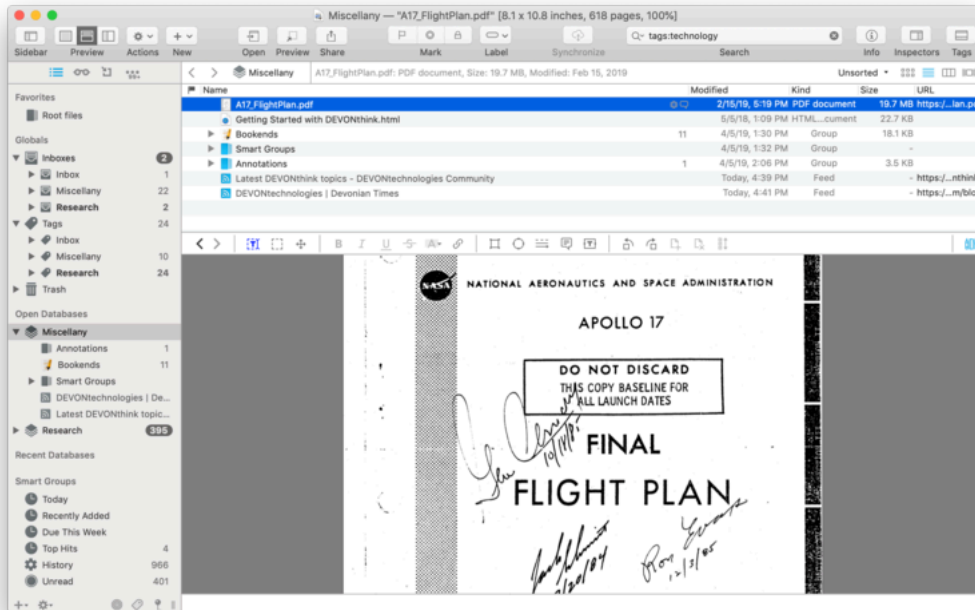
## UNINSTALLING

If for some reason you need to fully uninstall DEVONthink from your Mac, trash the following files and folders (~ stands for your account's home folder):

- DEVONthink
- ~/Library/Application Support/DEVONthink 3
- ~/Library/Application Scripts/com.devon-technologies.think3
- ~/Library/Preferences/com.devon-technologies.think3.\*
- All DEVONthink-specific scripts in ~/Library/Scripts
- All DEVONthink-specific workflows in ~/Library/Workflows/
- All DEVONthink-specific scripts in ~/Library/PDF Services/
- Uninstall the DEVONthink browser extension, following the uninstallation process for the particular browser.
- Bookmarklets from your web browser
- The reference to the global inbox folder in your Finder's sidebar
- Keychain entries containing devoncloudy in the name
- ~/Library/Mail/Bundles/DEVONthink.mailbundle

Note: In troubleshooting situations, please do not uninstall the software without talking to our support team beforehand. Most issues can be resolved without uninstalling the software.

# DEVONTHINK SIMPLIFIED



DEVONthink is a very flexible application, appealing to a broad range of people and accommodating many different working styles. Since people use it in such diverse ways, it often leads people to believe there is a "steep learning curve" associated with it. The truth of the matter is DEVONthink is a powerful application built on simple, and often familiar components and concepts. Here we'll cover the basics.

## INTERFACE

At its core, DEVONthink is a multi-window, document-based application. Multi-window merely means you can have more than one window (or window tabs, if you prefer) open. Document-based means it supports viewing, and in some cases editing, documents. Apple Notes is an example of a document-based application without multi-window support.

DEVONthink has two main window types: a main window (seen immediately when the software opens), and document windows. These windows are used in already familiar ways, supporting drag and drop, sorting on different attributes, full screen views, etc. Whether you are working (or playing) in DEVONthink, you will be using one or both window types.

DEVONthink supports different ways of viewing your items, e.g., in lists or as icons. You can show or hide many details in the window, allowing you to work in very simple or complex views of your data. Specifics about windows and their component panes and bars are discussed in more detail in the [Windows](#) and [Inspectors](#) chapters.


DEVONthink also has a powerful array of tools found in its [menus](#). Many of these are also found in the [contextual menus](#) when

Control-clicking items in the software. And to fine-tune some of the options, it also has extensive [preferences](#).

## DATABASES


Beyond the interface, DEVONthink has only a few core working components: databases and items. Items are comprised of two essential components: groups and documents.

**Note:** Throughout the documentation, we use *item* to represent both groups and documents. Things that only apply to one or the other will use the appropriate term.

Displayed as  and shown only in the [Navigate](#) sidebar, databases are the fundamental unit in DEVONthink, filled with items. No matter if your content is grouped, ungrouped, or a mix, it is all housed in a database. You add, remove, organize, and search for files within DEVONthink, just as you've done in the Finder forever. Simple.

When you create a database, it is made as a self-contained package in the Finder. Packages are technically folders that are handled like single files by the Finder.

DEVONthink databases are not merely a series of files and folders in the Finder, but are isolated from each other and function a bit more like disks. When you plug in an external drive, it appears in the Finder's sidebar isolated from other disks, but still capable of moving and organizing data on it. In a similar fashion, open databases appear in DEVONthink's sidebar and behave in much the same way.

**Global Inbox:** Displayed as , when you launch DEVONthink, you will immediately see a database called *Inbox*. This is a special database and a core component of the software. As a core database, you can't delete or close it, as it provides an always open database for quickly storing unfiled or transient data.

Imagine you are reading about fission reactions and someone sends a link about a vacation place in Bali. You jump to the website and quickly clip a webarchive of the page. But instead of putting it in your research database, you add it to the *Global Inbox* and get back to work. You can go back later and read or sort things to other databases. If you are familiar with [Getting Things Done](#) you'll recognize the concept.


The *Global Inbox* is also special as it is the only database you can add a shortcut to in the Finder's sidebar. This allows you to save a file into the *Global Inbox* from other applications.

All databases also have an *Inbox* group with the same purpose as the *Global Inbox*. It just allows you to save unfiled data to a more specific database, as needed.

## GROUPS

One of the two basic items are groups. No different than the folders and groups found in many other applications, they merely serve as ways to keep certain bits of data together. But within the DEVONthink groups are a few variations. They are all simple to recognize and understand, but they bear being introduced.




**Ordinary Groups:** Displayed as , these are analogous to folders in the Finder. Except for underlying technology, groups operate in the same fashion. Creating, adding and removing contents, and deleting are all essentially the same. Just as in the Finder, you can create subgroups to suit your needs.


Looking and behaving like folders you've used in the Finder, groups are the simplest way to segregate data. DEVONthink allows you to create deeply nested hierarchies or simple top level groups, whatever you need to keep things organized in a way that makes sense to you.

New empty groups can be made with the [Data > New > Group](#) command. Groups of selected items can be easily made and unmade via the *Group Items* and *Ungroup Items* commands in the [Data](#) menu. These commands are also in the contextual menu.

Groups are also the target of DEVONthink's [classify](#) function. The AI compares document contents and locations and offers suggestions for where items may best be filed. As documents are filed, manually or taking the AI's suggestions, it becomes more and more adept at helping you file more efficiently.

**Group Tags:** Displayed as , these are created and operate like ordinary groups, with one extra function: the name of a group tag is applied as a tag to its contents (sometimes referred to as "children"). By unchecking [Exclude Groups from Tagging](#) in a database's properties, any group you create will function this way. For individual groups, you have the option of choosing *Exclude from Tagging* from the contextual menu or [Info](#) inspector.

As you add items to a group tag, they are automatically tagged with the parent folders' name. Similarly, removing items from a group tag will remove the parent tags. Also, if you create sub-groups, these will also be created as group tags. This can be useful if you're using a group for staging purposes, e.g., a groups for unassigned, in progress, and done items. Moving files between these groups would change the tag to its current parent group.

**Smart Groups:** Displayed as , smart groups should be familiar to anyone using saved searches in the Finder. Similar to them, smart groups don't actually contain anything. They merely show you items matching the criteria you specify. Sometimes broadly used in situations where deeply nested groups are not used, you can create as many as you'd like no matter your approach.


These special groups allow you to create virtual groups based on any number of matching criteria. These can be simple, e.g., "all PDF files in a database", or complex, like "all unread documents with a specific color label added in the last week but excluding HTML files". If you like to use a looser filing method, using smart groups allows you to file your items with less concern about where they're located in the database. With smart groups you can also have items appear in more than one smart group without replicating or duplicating files explicitly. For example, a smart group could show items tagged with "taxes". You could then create another smart group with items tagged with "taxes", "business", and "2018".

Local smart groups, i.e., ones applied to a specific database, can be created and [edited](#) via the [Data > New > Smart Group](#) command. You can also find this command in the contextual menu when Control-clicking in the item list. Smart groups can also be created when doing an [Advanced search](#).

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

- **All Images:** Shows all images.
- **All PDF Documents:** Shows all PDF documents.
- **Duplicates:** Lists all duplicates.

**Note:** Smart groups filtering on dates or unread status are shown with special icons.

**Smart Rules:** Displayed as  and found only in the [Navigate](#) sidebar, smart rules are a type of smart group with an extra function: they not only match items by the criteria you specify, they can also act on them. These actions can even trigger when certain events happen. For example, you could have a smart rule matching PDFs in the *Global Inbox* and have newly added PDFs be added to the [Reading List](#).

## DOCUMENTS


The second basic item in DEVONthink are *documents*. No different than the Finder, documents are any files you add or create in your databases. Perhaps you are importing spreadsheets for work, or PDFs for your thesis. Maybe some photos from your


vacation you want to link to in a Markdown document you're working on. They're all just documents.

DEVONthink supports adding many kinds of files to your databases, but note the type of file determines its usefulness in the database. For example, images can easily be added but searching for them is limited to searching by attributes like file type or filename. Remember DEVONthink excels at text-based operations, so files like rich text or PDFs are very well supported.


**Note:** More information on the types of files you can create or import can be found in the [Documents](#) chapter.

While not types of document per se, there are two variations on documents available to you: *duplicates* and *replicants*.

**Duplicates:** Displayed with  to the right of a document's name or the name [optionally shown in blue type](#), there are two ways to get a duplicate in your database. Firstly, just as you'd expect in the Finder, select a file and press ⌘D: a duplicate is made. Secondly, if DEVONthink examines the contents and determines it has another file with the same content, it will mark them as duplicates. Duplicates are separate files, and changes to the content of one should remove its duplicate status.

**Replicants:** Displayed with  to the right of a document's name or the name [optionally shown in red type](#), replicants are conceptually similar to aliases in the Finder or a second phone book entry for the very same person. Replicants are one file showing up in more than one location. However, they consume

no more space than a single file. Since they are clones, changes made to any instance of a document apply to all instances. This makes them useful when you want to file a document in more than one location, but don't want to have to update each document individually. It can also be useful if you have larger files you want filed in more than one group. A 10 MB PDF, replicated in ten different groups, would only use 10 MB of space in the database.

There is also the possibility of having a document that is both replicated and a duplicate. This will display this icon to the right of the name: 

It's important that you understand how replicants work before you begin making changes to documents. Any changes to a replicant are carried over to all replicants; as you might imagine, this means that you can do some very powerful (and potentially negative) things with your database's contents via replicants. Duplicates, on the other hand, allow you to change the files without modifying the original document or group. Duplicates are less powerful than replicants, but no less important in the grand scheme of database organization.

On a technical side note, when you add an ordinary tag to a file, a replicant is made in the appropriate tag group.

**Note:** Replicants cannot be created in the same location as the originating file, nor can they be made across databases.

## THE DETAILS

We hope this has given you some insight into the basics of DEVONthink. DEVONthink is deep and powerful, but understanding these basic concepts and seeing parts you are already familiar with will hopefully dispel some of the "fear" that it's complicated and hard to learn.

That being said, we also have more in-depth information for you. From simple overviews of [menu commands](#) to details in the [appendix](#) can be found in the remainder of this guide.

## BUILDING YOUR DATABASE

The first step in starting your own custom database is to create a new database with [File > New Database](#). Give your database an easily recognizable name, and choose where you want to save your database. We advocate putting them in a folder in your home directory, like ~/Databases. With your new database created, you are ready to add information.

**Encrypted Databases:** If you have databases containing sensitive or private information, you can create an encrypted database. This is specialized AES-256 encrypted disk image that will not appear in the Finder or your desktop when it's open. In the [See also p. 66ff](#) *Navigate* sidebar, you will see a key icon to the right of the database's name, denoting it is an encrypted database. Quitting DEVONthink or closing the database unmounts the disk, so you are always required to enter the password to access it.

Choose [File > New Encrypted Database](#) and enter a password that will be used to unlock it. Enter a reasonable anticipated size for the database, in megabytes or gigabytes. This is how large you think the database will get. Since the encrypted database functions like a connected drive, you define how large it is and "fill it up". You can choose to let Spotlight index the contents, but bear in mind the Spotlight index is stored locally and isn't encrypted. This means someone could find a document in the database exists via a Spotlight search. However, they wouldn't be able to open and access the database without the proper password.

Note: You cannot create or store a database in a cloud-synced folder, e.g., iCloud Drive or Dropbox. This is not data-safe so the behavior is explicitly disallowed. The advocated location is a folder in your home directory, like ~/Databases. If you try to open a database in one of these locations, you will be prompted to let DEVONthink move the database, or reveal it so you can manually relocate it.

## ADDING YOUR FILES

After you've created your database, you'll add your files to it. Often it's a simple matter of dragging and dropping files into your database, but we've covered several additional methods in the [In and Out](#) chapter. Also, please take a moment to review the [Import and Index](#) section to familiarize yourself with these two options.

While you may be tempted to dump every file on your hard drive into DEVONthink and sort it out later, you're best off being

more selective in what you add (especially in the beginning). Having a large, "dump it all in" database can contain a lot of files that will do you no practical good (for example, DEVONthink can't read your Microsoft Office user profile files), and weeding these files out after-the-fact can be both time-consuming and frustrating. Also remember, DEVONthink has to index metadata and contents of any compatible files. This will be less productive if you add files you'd never want to use or search for.

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

As your growing databases use RAM, processor time, etc., smaller, more focused databases are often a more effective approach than using singular, monolithic databases. Separate databases generally perform better, sync faster, and in the rare case of a catastrophe, can help avoid data loss since you're not keeping "all your eggs in one basket". Another benefit of this approach is the ability to conserve some machine resources. With a single, large database all the information is always using resources, even files unrelated to what you're working on at the moment. With separate databases, you can close and open specific databases as the need dictates.

One way to effectively create separate databases is to use a topical database approach. Create multiple databases, with each holding only related information: a bird watching database full of birding articles and newsletters; a quantum physics research database with research briefs and email. This method can improve the effectiveness of DEVONthink's artificial intelligence (AI) features with each database. The AI work best within a database that contains contextual relationships among many documents; clogging your new database with everything from A (apple pie recipes) to Z (Zengobi user documents) will only hamper the AI's ability to work effectively.

Having topical databases can help down the road as well. You may be collaborating on a database, syncing between machines in a group. Imagine having just one database: You decide to share your painstakingly researched academic articles with colleagues, only to find that you've mistakenly also shared personal financial records and chats. Not hard to imagine how that has the potential to be both dangerous and embarrassing. Having multiple, topical databases will allow you to keep your data separate and private.

## ORGANIZING

Database organization depends on the parties involved. For collaborative work, you'll want to organize it in a manner that's understandable to all parties using it. This is especially important as our [sync](#) technology is a mirroring sync, meaning changes to one copy of the database gets synced to the other copies. For personal work, just set up your database in a manner that makes

sense to you. There is no right or wrong way to organize it. This is something you've likely already been doing in the Finder, making folders and filing things in them. Apply the same personal choices to DEVONthink. You can also use [smart groups](#) to create virtual groups.

Remember that creating databases isn't a inviolable commitment. Create and destroy them as you see fit. Start with one way of organization and decide later to re-organize your databases. With DEVONthink you can keep multiple databases open simultaneously, easily moving documents from one database to the other at any time. As you work with your databases, new ideas may spark new approaches which can easily be tried and adopted or discarded.

## CASE STUDY: BILL'S DATABASE FARM

[Bill DeVille, formerly DEVONtechnologies' Evangelist](#), worked in a number of scientific areas. Bill's main database covered environmental science and technology topics, with related interests in science and technology exchanges with developing nations. The database even contained some projects dealing with graduate education in environmental sciences and engineering. There's a broad topical relationship among these subjects and the database covers disciplines ranging from chemistry, toxicology, statistics, risk assessment, and engineering to economics, legal, regulatory, and policy issues. These disciplines fit together and combinations of these topics are necessary in many real-world cases.

As you can imagine from the above description, Bill's main database was quite large, containing about 20,000 documents and over 20,000,000 total words. Because of the relationships knitting together all these scientific, technical, legal, and policy issues, the artificial intelligence features of DEVONthink worked very well for Bill in researching the database and contextualizing the information.

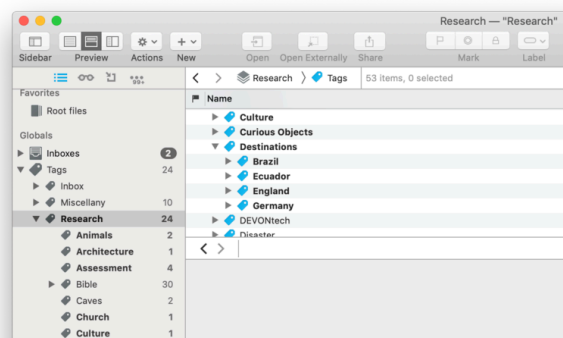
In addition to his main database, Bill had seven additional databases (so, eight total). For example, he had one database for [Apple Newton](#) literature he has accumulated over the years. It's almost as big as his main database, but the topical coverage has no practical relationship to the main database,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

Occasionally, Bill added topical materials to it that are not related to its main purpose. However, when those "unrelated" topics grew large enough in volume, he spun them off into to a new database in order to preserve AI accuracy and relevance.

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

## TAGGING

Tagging is a common method of creating contextual relationships between documents. For example, you can apply a "hobby" tag to a woodworking article and a sewing machine PDF manual. You would then find both documents when searching for the "hobby" tag. Used in the Finder and many other applications, DEVONthink also supports tagging in your databases (including preserving Finder tags on imported and indexed items). Tags are either ordinary tags or group tags, each discussed below.



### ORDINARY TAGS

Similar to tagging methods used in other applications, ordinary tags are added to items by you.

**Creating tags:** When you add a tag to an item for the first time, a tag group is automatically created in the [Tags](#) section for the current database. However, if you want to proactively create tags to be used later, you can select the [Tags](#) section for the database and choose the [Data > New > Tag](#) command. You can also choose *New Tag* from the contextual menu when Control-clicking the [Tags](#) for the database.

**Applying tags:** When you apply a tag to an item, a replicant of that item is created in the *Tags* section for the current database. For each tag you apply, you will have a replicant in each tag group. These are not the original items, but only instances of the items. If you delete a tag group, the group and the replicants it contains are removed. The original items in the database remain intact.

Ordinary tags are most commonly applied to items by these methods:

- Type tags into the [Tag bar](#) under a document's [View/Edit](#) pane.
- Type tags into the *Tags* section of the [Info](#) inspector or the [Info](#) popover for a document.
- Drag items to a tag in the *Tags* section of the *Navigate* sidebar. Note: If you drag an item to a tag in another database, that item will be moved to the receiving database.

In the case of multiple selected items, any tags common to all the items will be shown in the *Info* inspector and *Info* popup. Tags unique to specific files aren't displayed. However, you can add tags common to all the selected items using these views.

Tags can also be applied by more automated means, e.g., scripting and smart rules. see the [Automation](#) chapter for more information.

## NESTED TAGS

Sometimes referred to as "hierarchical tags", nested tags are a series of related [ordinary tags](#), combined under a parent tag. When you add a child tag, the item automatically inherits the parent tags. In the example

shown below, adding a tag of "Casper" to an item would automatically add the "Wyoming" and "US" tags.

Note: If you are having trouble deleting a tag from an item, check to see if you are adding a nested tag.

**Caution:** Tags for a database can have the same name. This may seem illogical, but it's something more commonly seen that you may expect. For example, say you have a travel database with points of interest like restaurants tagged in different locations. You may find yourself with a tag structure like this...

### Example:

```
US
  Wyoming
    Casper
      Restaurant
  Minnesota
    St. Paul
      Restaurant
```

If you added a tag `Restaurant` to an item, what tag would it go to? It actually would go to the most recently entered instance of the `Restaurant` tag.

So how is this resolved? Tags are meant to be unique, so eliminating redundant tags is first priority. Restaurants aren't specific to a geographic location. Create the `Restaurant` tag as a top level tag. If you had a need for hierarchy with the tag, perhaps for tax purposes, you could move it into a parent Tag of `Entertainment`. Then you would get both tags when you added `Restaurant`. But again, if you anticipate wanting to use the tag without the parent tag, you should make it a top level tag.

Also, you shouldn't view the tags as a group structure in and of itself. Nested tags are just meant to group tags specifically related to each other, so they can be applied en masse.

**Note:** Tagging methods and philosophy is full of strong opinions. Many people feel tagging should always be flat; only top level tags and no hierarchies. DEVONthink accommodates both approaches. However, if you want to use nested tags, we hope you carefully consider the caution we've presented and use a hybrid method to avoid unexpected behavior.

## GROUP TAGS

Previously discussed in the [Groups](#) section earlier in this chapter, group tags allow you to dynamically assign tags based on their location. As you add files to a group, they have tags of the parent groups' name assigned to them. Similarly, if you move the items to a new group, the tags are removed and new ones applied relative to the new location. Whether used statically or dynamically, group tags can be used creatively. They also work in conjunction with ordinary tags, so you can employ both methods in one database.

### Example:

Imagine you have a work database with groups for different stages of a project: *Unreviewed*, *Assigned*, *In Progress*, *On Hold*, and *Done*. At the beginning of the process, you'd put the item in the *Unreviewed* group and it would be tagged as such. After reviewing, you could move the file into the *Assigned* group and the previous tag would be removed and

replaced with *Assigned*. As the project moves through the staging groups, the tag would change.

And of course you can use ordinary tags, e.g., *Reviewed* or a client identifier, on these items. Those tags would be preserved no matter where you move them in the databases.

Groups tags are applied by DEVONthink automatically. But you can also use do some automatic filing by entering existing group tags manually. If you enter the name of an existing group that is not excluded from tagging into the *Tag* bar or an *Info* panel or popover, the item will be replicated to the appropriate group. You can also drag an item to a group tag in the *Tag Cloud* at the bottom of the *Navigate* sidebar.

**Considerations:** When you enable using group tags for a database, it starts as an all-or-nothing situation. All groups in the database function as group tags.

If you want to use group tags for most groups in a database, you can Control-click specific groups and choose *Exclude from Tagging*. You can also choose this option in the *Exclude from...* section of the *Info* inspector or *Info* popup for a specific group. However, note you must change this setting on all individual groups you'd like to exclude.

If you only want a limited number of tags, it would be advisable to exclude groups from tagging for the database and use [ordinary tags](#) instead.



## AUTOCOMPLETION

When you are typing tags, an autocompletion list will appear. In the *Global Inbox*, tags from any open databases are shown as potential tags. In other databases, the items displayed are only from the tags of the current database.

While group tags aren't added to the *Tags* group for a database, they are displayed in autocompletion suggestions.

**Tags and Aliases:** DEVONthink also honors aliases added to groups. You can add "alternative names" to a group using *Info* popup or inspector and later use these alternative names as a tag. Continuing the previous example, you could add an alias of *IP* to the *In Progress* group. Now, type *IP* as a tag and it will be replicated to the *In Progress* group. When you view the file, you will see the proper group tag was automatically added.

## SEARCH AND GATHER

Finally, tags have two main functions: segregating data and searching for data. You use tags to gather items together in certain contexts. You also use tags to search for those items.

Searching for items by their tags is easily done in a few ways:

- **Tag cloud:** The [Tags Cloud](#) allows you to filter the current list of files by clicking on available tags. As you click, only related tags are shown so you can fine-tune the items displayed in the item list.
- **Search field:** The search field at the top of every main window allows you to search for

tags by using the [advanced options](#) for a search. You can also search for tags using a simple `tags:` prefix. Multiple tags can be specified, separated by commas. You can also use `tags! :`, to exclude tags.

Gathering similarly tagged items is powerfully achieved with [Smart Groups](#). Smart groups allow you to use the [smart group editor](#) controls to set criteria to be matched. Included and excluded tags can be added as criteria. Files matching the parameters of the smart group are shown, regardless of their location in the database. This way you can leave your files where they are and create virtual folders for specific purposes.

## A WORD ABOUT BACKUPS

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

## INTERNAL BACKUPS

DEVONthink backs up its database index every week, either immediately after opening the database (if the backup is overdue) or during the day when appropriate.

Note: The internal backups are mainly a troubleshooting mechanism for use in the application. Backing up your files, including your DEVONthink databases, is up to you.

## FULL BACKUPS

We strongly recommend you get in the habit of triggering backups whenever you have invested substantial time and effort into modifying the database. Apple's Time Machine and an external drive is an easy way to do this. Simply connect the drive and let Time Machine do its thing. With the low cost of portable external drives, it's even feasible to take a 1 TB drive that can fit in a shirt pocket for backups when you're out and about. Online backups such as [Arq Backup](#) are an alternative if you don't want to own another piece of hardware to care about.

As a secondary backup option, you can create an optimized and compressed copy of the whole database that you can then save on a server or other media. Use [File > Export > Database Archive](#) or [Scripts > Export > Daily Backup Archive](#) to create a ZIP file of the database. The former option allows you to choose specific place; the latter creates it in a *Backup* folder in your home folder.

Lastly, as events such as house fires and natural disaster frequently prove, valuable data should probably be kept at more than

one location. Consider saving a copy of your backed up information at a secure, off-site location such as a bank safe, or put the exported ZIP files of your database in your cloud account.

Note: As noted in our [FAQ](#), *sync is not a backup*, neither advertised nor advocated as such. While database restoration may be possible with sync data, it is not meant to be relied upon or used in lieu of proper primary backups.

## TUTORIALS, SCREEN CASTS, AND MORE

In addition to this help resource, explore tutorials and install pre-made scripts and templates that extend DEVONthink's functionality in the [Support Assistant](#). Also new tutorials are shown in the [Extras](#) sidebar.

For a great resource of tips, promotions, and release announcements, check out [our company blog](#).

And if you feel like talking to other people using our applications, you'll find discussion, camaraderie, and well over a decade's worth of information at our [Forums](#).

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

# DOCUMENTS

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As DEVONthink is an information and document management application, it supports importing many different file types. While not all formats are editable, if a QuickLook plugin is installed on the machine, the files should be viewable. Also, if a Spotlight importer for these files is installed, the files should be indexed by DEVONthink and searchable. In addition, DEVONthink supports creating some common types directly in the application.

In the [General](#) section of this chapter, we will discuss the essential window components you'll use when viewing or editing these documents. Following that are chapters for the types of files DEVONthink supports.

## GENERAL

When working with files in DEVONthink, they can be viewed in the [view/edit pane](#) of a main window or in a separate document window. When viewing a document, there are two essential components visible: the view/edit area and the navigation bar. These

will always be available when working with a selected file. Additionally, there are a few optional components available: [the editing bar](#) (for compatible formats), [the tag bar](#), and the [contextual menu](#).

## VIEW/EDIT PANE

The view/edit pane is where you can see or edit the current document (with compatible files). Each file type you view has its own tools, contextual menu commands, and keyboard shortcuts.


## NAVIGATION BAR

At the top of the view/edit pane, DEVONthink 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 you are viewing. The options below are shown in the navigation bar for most file types. Specific options are shown in the separate sections:

- ◀ 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. Only visible for, e.g., bookmarks.
- ⚙ Shows an action menu with options for opening the shown page in Safari, copy its address, or capture the page in a variety of formats.

- ✕ Shows if the document is locked or editable.
  - ⏪ 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 Alternative* mode. Useful for selecting text in uneditable formats, e.g., Word documents.
  - 📄 Switches to *Best Alternative* mode. For Markdown documents, this is the rendered HTML view.
- **Word Count:** Shows the number of paragraphs, words, and characters of the displayed text.
  - **URL:** Shows the URL associated with the displayed item, if one is present. If a PDF annotation is selected the URL field shows the associated URL if available. Click to launch the URL in its default application. Hold the `⌥` Option or the `⌘` Command key to open the URL in a new tab. Holding `⌥⌘` or `⌘` opens the URL in a new tab and selects it.
  - **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.

## EDITING BAR

For some formats, e.g., rich text or sheets, there is another bar available: the Editing bar. If you click this icon , the editing bar will appear in place of the Navigation bar.

This offers quick access to some editing tools related to the file type you're working on. See the appropriate file type section for more info.

## 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 `⌫` Backspace or `⌫` Delete key to remove it. [See also p. 14ff](#)

When you type the name of a tag, DEVONthink offers automatic completion. Choose the right option with the mouse or the arrow keys and press `↵` Return 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 `→` Tab 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.

## CONTEXTUAL MENU ITEMS

If you Control-click in many types of documents in DEVONthink, you are presented with a contextual menu showing many options. The options displayed depend on what you're clicking; e.g., selected text, and in whether you're in an editing or preview mode. As many of these commands are the same for most formats, we have provided a list

in the [appendix](#). Items specific to a format are listed in their respective sections in this chapter.

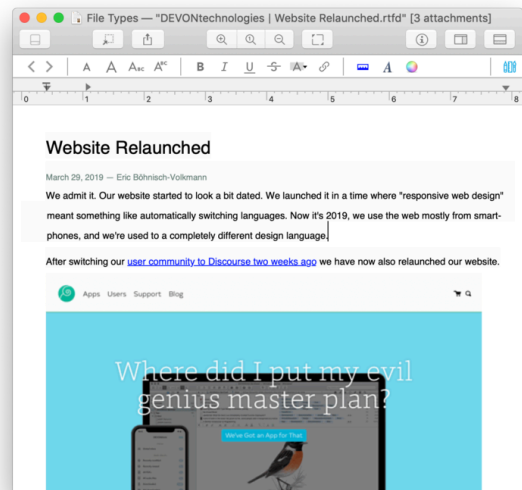
## TOOLBAR & SHORTCUTS

DEVONthink 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 type, you can easily add some by choosing [View > Customize Toolbar](#). Changes made to the toolbar will be persistent for that file type, but are independent of the toolbars of other types.

Please find a list of [toolbar items](#) and [shortcuts](#) in the appendix.

**Note:** Documents are automatically saved every five minutes after the last modification, when deactivating the window, or when quitting DEVONthink.

## PLAIN AND RICH TEXTS



### PLAIN TEXT

Plain text files may seem too simple to be truly useful. No styling. No images. Nothing but text. But the reality is these simple files are underlying a lot of your daily experience. From the HTML code instructing your browser how to display a web site, to the code DEVONthink is written in, plain text is very powerful. DEVONthink supports plain text files as a native, editable format.

Plain text files can be imported or created via [Data > New > Plain Text](#).

### RICH TEXT


Word processing applications brought us text with flair. Need some bold and italic text? How about adding a photo to the page? And color? These applications were providing it all. But their formats are proprietary so if you don't have the creator application, you can't open the file or you'll have to convert it first. The rich text format provides a useful text format that supports











formatted text. These files are generally cross-platform compatible and editable in many applications. DEVONthink uses the same text engine found in Apple TextEdit, so it's an easy transition if you're already familiar with it.


You can attach other documents to rich text documents simply by dragging them into the text. Technically the rich text document becomes an `.rtfd` package and the dragged file is saved as part of the package. Using the contextual menu, you can show an attachment's content in a Quick Look preview. Also, if you double-click an attachment, it will open in the system default application.

Rich text files can be imported or created via [Data > New > Rich Text](#).

## EDITING BAR

The navigation bar for rich text files includes the *Editing Bar*. Click this  icon and the editing bar will appear in place of the navigation bar. The tools available here consist of:

-  Increase the size of the font.
-  Decrease the size of the font.
-  Set characters to be subscript.
-  Set characters to be superscript.
-  Set bold on the text.
-  Set italic on the text.
-  Set underlines on the text.
-  Set strikethrough on the text.
-  Highlight selected text. This uses the currently selected [highlight color](#).
-  Add or edit a link applied to the selected text.

 Show or hide the ruler. 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.

 Show the *Fonts* panel.

 Show the *Color Picker*.

## THE FORMATTING BAR

In addition to formatting options in the [Format menu](#) and the simple controls in the editing bar, DEVONthink provides another toolbar just for rich text editing. Select [Format > Show Formatting Bar](#) to display a set of rich text controls under the toolbar in main or document windows. Similar to TextEdit, it provides the following options:

- **Styles:** Select a predefined text style from the pop-up menu. To define your own styles, choose *Other* to open the standard macOS style editor. In the style editor, navigate back and forth through the styles of your document or the stored favorite styles. (Use the radio buttons to switch between document and favorite styles.) Click *Select* to select all occurrences of text with the displayed style in the document, click *Apply* to apply the style to selected text, or click *Done* to leave the style editor. To add a style from your document to the favorites, click *Add To Favorites*; to remove a favorite, click *Remove From Favorites*.
- **Font Controls:** Displaying three dropdown menus for, choosing the font face, font weight, and font size.

- **Colors:** Two buttons are available for setting the text and background color.
- **Basic Styling:** Allows you to choose bold, italic, or underlines.
- **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 of the macOS rich text editor. On any blank line in a rich text document, type `⌘→` Option-Tab to create a bullet point (macOS shows dashes instead of bullets). Press `↵` Return 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.

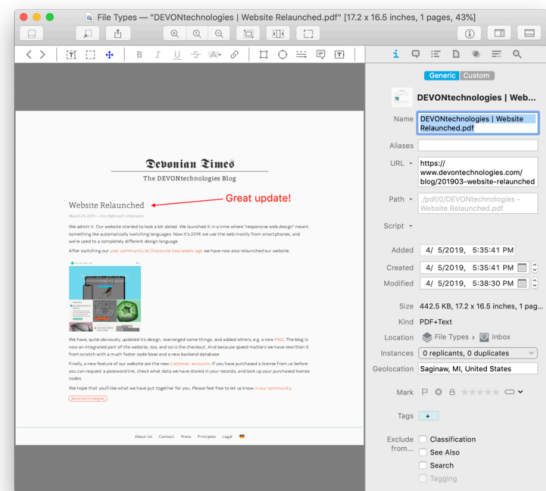
## CONTEXTUAL MENU

In addition to the [contextual menu items](#) available with text selections, rich text files also feature these specific commands:

- **Copy Paragraph Link:** Copies a link to the current document, but appends a pointer to the selected paragraph.
- **Insert > ...:** Inserts special characters or items into the document.

- **Quick Look Attachment:** Opens a Quick Look panel for the selected attachment in a rich text file.
- **Split Document:** Splits the document at the current insertion position. A new document is created for the text after the cursor position and removed from the current document. This can be used in rich text and plain text, including Markdown content in edit mode.

## PDFS



PDFs are a very common format, from academia and online bill payments to equipment manuals. Fortunately, they are first-class citizens can be viewed and annotated within DEVONthink. The annotation tools should be familiar and include options like arrows, text, and link annotations. While DEVONthink may not have some options found in specialized PDF applications, it is still a very capable PDF tool.

PDFs often come directly from text sources, like word processing or page layout applications. The content of these files should be indexed and searchable on import.

You can also acquire PDFs from scanned documents. These files will only have a text layer if OCR is done on them.

For scanned PDFs, you can do OCR directly in DEVONthink when needed.

In the [Tools menu](#) there are several PDF related commands, including access to Annotation tools (also found in the Navigation bar). Additionally, there are commands for changing the display, e.g., single to two pages, in [View > PDF Display](#).

PDF files can be imported. They can also be created by capturing web content, directly in DEVONthink or via our browser extension, *Clip to DEVONthink*. You can also use the PDF Service *Save PDF to DEVONthink 3* in the PDF dropdown of the print dialogs of most macOS applications. This will print a paginated PDF to your database.


**Inspector Panes:** There are two inspector panes with information specifically pertaining to PDF documents: the [Content Inspector](#) and the [Document Inspector](#). The *Content Inspector* allows you to see a list of thumbnails or an available table of contents. The *Document Inspector* gives you a view of PDF metadata, e.g., keywords, a list of annotations, and a list of links detected in the document. Please refer to the [Inspectors](#) chapter for more specifics.













## NAVIGATION BAR

In the navigation bar for PDFs, the number of pages in the document is displayed. Clicking on this navigation bar item opens a *Go to page* function so you can quickly jump to a

specific page. In addition, there are options to move to the first, previous, next, or last page.

## EDITING BAR AND ANNOTATIONS

The navigation bar for PDF files includes the *Editing Bar*, providing access to editing and annotation tools. Click this  and the editing bar will replace the navigation bar. The tools available here consist of:

-  Select text for copy or highlighting.
-  Select annotations on the page. Double-click an annotation to edit its properties. Press the  Delete key to remove the annotation.
-  Move or scroll the current page.
-  Underline selected text in the document.
-  Strike through selected text in the document.
-  Apply or remove highlighting on selected text. The highlight color will be the color selected in [Format > Highlight Color](#). Alternately, click and hold to select another color.
-  Add a link to a selected area. Click and drag over an area to establish a hotspot for the link to be active. For the *Link Type*, choose *Link within PDF*, navigate to another page and click *Set* to create a link between pages within the same PDF. Alternatively, choose *URL* and enter a URL to an external item. This can be a web site address, or drag files from the Finder or your DEVONthink databases into this field.
-  Add a rectangle annotation.
-  Add an oval annotation.
-  Add a line annotation.
-  Add a note annotation.



- ▣ Add a text annotation. Drag to create a text box. To change the font, choose [Format > Font > Show Fonts..](#) Note only one font can apply to each text annotation.
- ↶ Rotate the current page left (counter-clockwise).
- ↷ Rotate the current page right (clockwise).
- 📄 Add a new blank page before the current page.
- 🗑️ Delete the current page.
- ↕ Reverse the page order of the document.

The annotation tools in the editing bar are also available in the [Tools > Annotate](#) menu.

## CONTEXTUAL MENU

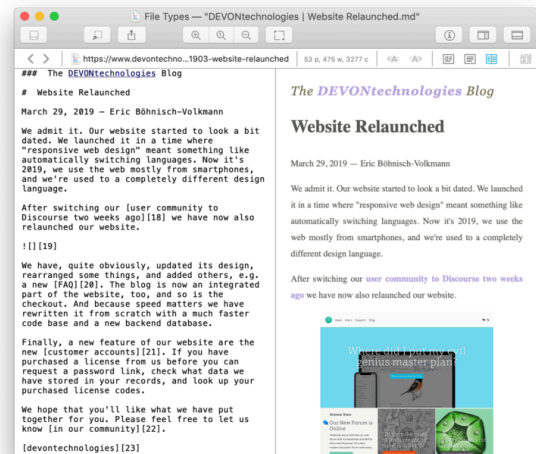
In addition to many common contextual menu items there are also a few PDF-specific options:

- **Automatically Resize:** When checked, the zoom factor adjusts to the width of the view/edit pane or document window.
- **Copy Page Link:** Copies a URL to the clipboard pointing directly to the shown page of the document.
- **Delete Annotation:** Deletes the selected annotations.
- **Previous/Next Page:** Jumps to the previous or next page.
- **Single Page/Two Page (Continuous):** Displays the PDF as single or double pages. Use the *Continuous* option to allow quick scrolling through the pages as one continuous document.
- **Split Document:** Splits the document before the current page. A new document

is created from the preceding pages and removed from the current document.

- **Reverse Page Order:** Reverses the page order of the document.

## MARKDOWN DOCUMENTS



[Markdown](#) is a simple formatting language invented by John Gruber that has gained in popularity over the past few years. It allows you to write in plain text, using some easily learned control characters, to produce nicely rendered HTML output. With some styling and ingenuity, you can create a wide variety of documents.

Markdown files can be imported or created via [Data > New > Markdown text.](#)

Writing Markdown is essentially the same as writing plain text documents. As you're writing you can switch easily between a plain text editor and the rendered view or even view both simultaneously using the side-by-side view.

**Styling:** Styling your Markdown documents can be done with internal styling or externally referenced stylesheets. If you have a specific

stylesheet you'd like to use globally, you can specify one in [Preferences > Media > Style Sheet](#).. Here are the options:

- **Internal styling:** `<style type="text/css"> ... </style>`
- **HTML Link:** `<link rel="stylesheet" type="text/css" href="css/styles.css" />`
- **XHTML Link:** CSS: `css/styles.css`. XHTML headers must be placed at the very top of the document.

Note: If no specific styling is applied, the font choice in [Preferences > Editing > Rich Text & Note Font](#) will be used when previewing Markdown documents.

**Linking:** You can reference local images, scripts, and other resources using [item links](#), downward-relative (traveling subgroups; it's not possible to travel up with '..' as documents can have multiple parents) or absolute (start with a forward slash) paths. Here are examples of linking an image:

- `![link] (item.png)`: Use this when linking to an item in the same group as the Markdown document.
- `![link] (group/item.png)`: Use this when linking to an item in a sub-group of the group containing the Markdown document.
- `![link] (/group/item)`: Use this when you are linking to an item in a group outside the group containing the Markdown document. For example, if you have common resources in a specific group, you can link to them using this format.

If you have enabled automatic [WikiLinks > Names & Aliases](#), documents can be detected as you write your Markdown. These WikiLinks


are active when previewing the file and are also preserved in a website export or conversion to other formats. Drag items into the Markdown document in edit mode and have links automatically created. If the dropped file is an image, add an exclamation point before the dropped item's name, it will create a proper Markdown formatted image link.

Another option for inserting links into Markdown documents, Control-click while editing and choose *Insert Link To* from the contextual menu. A Markdown formatted link will be automatically inserted for you. For images, just add an exclamation point before the link if you want it to display in the rendered document.

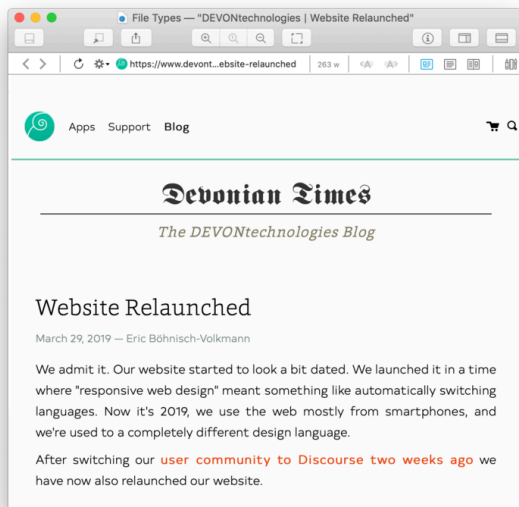
You can learn more about Markdown and its syntax on [Gruber's Markdown pages](#) or the [MultiMarkdown](#) syntax guide.

Note: DEVONthink supports many features of MultiMarkdown 6, but not all of them (e.g., no file transclusion).

## NAVIGATION BAR

When working with Markdown documents, you can switch between *Preview* and *Source* modes. There also is a special icon  present in the navigation bar. This switches to *Side-by-Side* mode, allowing you to edit and preview the current document in two side-by-side panes.

## HTML-BASED FORMATS



HTML-based files in DEVONthink include bookmarks, web archives, formatted notes, and RSS articles. These are formats that are viewable in web browsers and are also mobile-native.

### BOOKMARKS

Bookmarks are exactly the same as the ones found in your web browser. With DEVONthink's ability to act as a browser, bookmarks can be a valuable part of your experience. When using [File > Import > Bookmarks](#), you can bring your bookmarks into DEVONthink easily. Though this depends on the capability of the individual browser, you may be able to drag links directly into your database. You can also capture them with DEVONthink's browser extension, *Clip to DEVONthink*.

**Note:** If you import your bookmarks from a browser, this is a copy operation not a sync, i.e., if you modify bookmarks in your browser, this will have no effect on DEVONthink's contents. However, you

can do another import to add the new bookmarks to your database without duplicating the previous ones.

In addition to importing bookmark files, they can be created via [Data > New > Bookmark](#). Just provide a URL and title. If you don't enter a title, DEVONthink will attempt to detect and use the page title.

### FORMATTED NOTES AND HTML

**Formatted Notes:** allow to write simple formatted text including embedded images that can be viewed on any system with just a web browser. While the range of formatting options is smaller than that of rich text they are much more compatible to today's standards. You can find all available formatting commands in the [Edit](#) and [Format](#) menus. By default formatted notes use the font set in [Preferences > Editing > Rich Text & Note Font](#).

Technically formatted notes are based on HTML, the language of the world-wide web. Images are embedded directly into the HTML code so that formatted notes are completely self-contained. The HTML code is also cleaned from unnecessary tags and an identifying meta tag is inserted that lets DEVONthink distinguish formatted notes from normal HTML pages. Form tags, e.g., for checkboxes and input fields are not removed and the status of checkboxes and form fields is retained.

Bear in mind, the underlying markup in formatted notes can't be edited in DEVONthink. However, you can open the files in a compatible external editor, if you'd like.

Note: Since images are completely embedded in the documents, the resulting file size can grow large very quickly. Resizing images before adding them is encouraged.

**HTML Files:** are similar to formatted notes, but they do not preserve the state of checkboxes and form fields. You also cannot add images by dragging them into the live editing view. However, you can edit the underlying HTML code using the *Source* and *Side-by-Side* modes found in the navigation bar.

Formatted notes can be imported or created via [Data > New > Formatted note](#). When using the *Notes from Evernote* or *Folders & Attachments from Notes* options in the [File > Import](#) menu, the imported notes are formatted notes. HTML files can be imported or created via [Data > New > HTML page](#).

## WEB ARCHIVES

Web archives are a special HTML file format intended to create offline archives of individual web pages. The downloaded data preserves the look and feel of the page very closely. It is often a more useful capture option when a PDF would generate a very long page since web archives always view at the size determined by the browsing area.

They function in a similar fashion as formatted notes, so you can actually edit the captured contents and save your changes. This can be very handy for highlighting passages or removing unwanted elements, e.g., ads, in a captured web page. Also, since they are HTML files the underlying markup can be edited using the *Source* and *Side-by-Side* modes found in the navigation bar.

Note: Web archives can be very useful with web pages using statically linked content. However, some popular and monetized sites get their contents dynamically from other sources, so the actual data is not in the underlying HTML. These pages may have missing content due to this, require an internet connection to display content, and run JavaScript. If you encounter this, a PDF may be a better archiving option.

Web archives files can't be directly made. They are the result of capturing web content, either in DEVONthink or using our browser extension.

Note: Web archives made on macOS Mojave aren't necessarily compatible with earlier versions of macOS.

## RSS


RSS feeds are special "web pages" that don't show as pages but as a stream of news articles. DEVONthink allows you to keep that news flowing directly into your databases. Supporting RSS, RDF, Atom, and JSON feeds, DEVONthink functions as a basic newsreader.




RSS feeds are treated as a special type of file that functions as a group. Feed articles are downloaded to the feed and saved in a format you specify in DEVONthink's [Preferences > RSS > Feed Format](#). The default is *Automatic* and saves summary files as HTML. The styling of the HTML articles is controlled by an internal CSS stylesheet specified in [Preferences > RSS > Feed Style Sheet](#). Other formats will get their styling from the source they're downloaded from.

Note: When using an option other than *Automatic* as the feed format, DEVONthink must download the linked content and convert it to the appropriate format.


RSS feeds can be created via [Data > New > Feed](#). Provide a URL and title. If you don't enter a title, DEVONthink will attempt to detect and use the feed's title. You will also notice a special feed in this menu: *Twitter Feed*. This can be used to import feed articles from a specific Twitter account.

## EDITING BAR

Like rich text files, editing HTML-based files (excluding bookmarks) includes the *Editing Bar*. Click this  icon and the editing bar will appear in place of the navigation bar. The tools available here consist of:

- A Increase the size of the font.
- A Decrease the size of the font.
- A<sub>sc</sub> Set characters to be subscript.
- A<sup>sc</sup> Set characters to be superscript.
- B** Set bold on the text.
- I* Set italic on the text.
- U Set underlines on the text.
- ~~↵~~ Set strikethrough on the text.
-  Highlight selected text. This uses the currently selected [highlight color](#).
-  Add or edit a link applied to the selected text.
-  Show or hide the ruler. 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.

- A Show the *Fonts* panel.
-  Show the *Color Picker*.

## CONTEXTUAL MENU

In addition to the [contextual menu commands](#) available with text selections in a document, HTML based files often include these items:



- **Add Page to Reading List:** Adds the current page the [Reading List](#) as a bookmark.
- **Capture ...:** Captures the Control-clicked frame, image, link to the inbox of the current database.
- **Capture Page:** Captures the current page in the selected format to the inbox of the current database.
- **Copy ... Address:** Copies the frame URL of a Control-clicked frame, image, page, or video to the clipboard.
- **Insert > ...:** Inserts checkboxes into the document.
- **Open ... in New Tab:** Opens a Control-clicked image, page, or video in a new DEVONthink tab.
- **Open Image in PhotoStickies:** Opens the image in [PhotoStickies](#).
- **Open Page in Browser:** Opens the current page in your default web browser.
- **Open Page in DEVONagent:** Opens the current page in [DEVONagent Pro](#).
- **Reload:** Reloads the page from the Internet.
- **Update Bookmark:** Updates the URL of this document to the current one, e.g., after navigating to a sub-page.
- **Update Captured Archive:** Updates the contents of a web archive file with the live version on the Internet.

- **Add Page to Downloads:** Adds the page address to the [Download Manager](#).
- **Download Video:** Downloads the video using the [Download Manager](#).



## SHEETS

policyID	statecode	county	eq_site_limit	hu_site_limit	fl_site_limit	fr_site_limit	tlx_2011
119736	FL	CLAY COUNTY	498960	498960	498960	498960	498960
448094	FL	CLAY COUNTY	1322376.3	1322376.3	1322376.3	1322376.3	1322376.3
206893	FL	CLAY COUNTY	190724.4	190724.4	190724.4	190724.4	190724.4
333743	FL	CLAY COUNTY	0	79520.76	0	0	79520.76
172534	FL	CLAY COUNTY	0	254281.5	0	254281.5	254281.5
785275	FL	CLAY COUNTY	0	515035.62	0	0	515035.62
995932	FL	CLAY COUNTY	0	19260000	0	0	19260000
223488	FL	CLAY COUNTY	328500	328500	328500	328500	328500
433512	FL	CLAY COUNTY	315000	315000	315000	315000	315000
142071	FL	CLAY COUNTY	705600	705600	705600	705600	705600
253816	FL	CLAY COUNTY	831498.3	831498.3	831498.3	831498.3	831498.3
894922	FL	CLAY COUNTY	0	24059.09	0	0	24059.09
422834	FL	CLAY COUNTY	0	48115.94	0	0	48115.94
582721	FL	CLAY COUNTY	0	28869.12	0	0	28869.12
842700	FL	CLAY COUNTY	0	56135.64	0	0	56135.64
874333	FL	CLAY COUNTY	0	48115.94	0	0	48115.94
580146	FL	CLAY COUNTY	0	48115.94	0	0	48115.94
456149	FL	CLAY COUNTY	0	80192.49	0	0	80192.49
767862	FL	CLAY COUNTY	0	48115.94	0	0	48115.94
353022	FL	CLAY COUNTY	0	60946.79	0	0	60946.79
367814	FL	CLAY COUNTY	0	28869.12	0	0	28869.12
671392	FL	CLAY COUNTY	0	13410000	0	0	13410000
772887	FL	CLAY COUNTY	0	1669113.93	0	0	1669113.93
983122	FL	CLAY COUNTY	0	179562.23	0	0	179562.23
934215	FL	CLAY COUNTY	0	177744.16	0	0	177744.16

[Sheets](#) contain text in a table and can be used to store any kind of tabular data from an address book to recording health statistics to employee timesheets. They are made up of records, defined by parameters displayed as a form or columns. For example, a simple sheet could contain a table of peoples' name, title, and department.

Sheets can be displayed as a table or a form via the [View > Document Display](#) menu or using the  and  buttons in the navigation bar. The table view is similar to standard spreadsheet views. Form view is similar to the record view in, e.g., FileMaker.

policyID: 119736  
statecode: FL  
county: CLAY COUNTY  
eq\_site\_limit: 498960  
hu\_site\_limit: 498960  
fl\_site\_limit: 498960  
fr\_site\_limit: 498960  
tlx\_2011: 498960  
tlx\_2012: 792148.9  
eq\_site\_deductible: 0  
hu\_site\_deductible: 9979.2  
fl\_site\_deductible: 0  
fr\_site\_deductible: 0  
point\_latitude: 30.102261  
point\_longitude: -81.711777  
line: Residential  
construction: Masonry  
point\_granularity: 1

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. Hold the  Command key to activate a link in a cell.

If you import tab or comma-delimited files, e.g., CSV or TSV files, they will be imported and displayed as sheets. Sheets can also be created via [Data > New > Sheet](#). You will just need to provide starting column headings, which you can certainly add or take away from later.

## NAVIGATION BAR

There are a few sheet-specific items in the navigation bar. In *Best Alternative* mode, the number of records in the sheet is displayed. In addition, there are options to go to the first, previous, next, or last records. In *Text Alternative* mode, it displays the current record and the total number of records in the

sheet. Clicking on this information opens a *Go to record* function so you can quickly jump to a specific record.

## EDITING BAR

To make working with sheets even more efficient, DEVONthink includes the editing bar with some basic tools:

- ➦ Add a new record to the sheet.
- ➦ Duplicate the current or selected records.
- ➦ Delete a new record from the sheet.
- ➦ Add a new column to the sheet.
- ➦ Displays the Column Editor to allow editing and managing the columns.
- ➦ Delete a column from the sheet.

In *Text Alternative*, there is one more option in the editing bar: *Delete Selected Column* allows you to delete a column. Just click on the column header you want to delete, then this option is enabled.

## CONTEXTUAL MENU

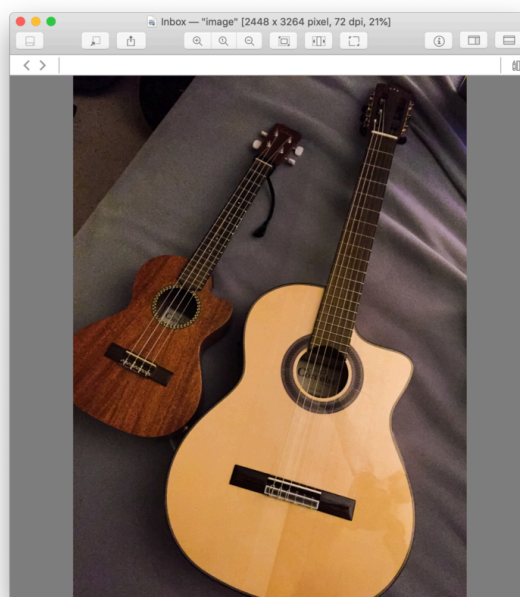
There are a few sheet-specific contextual menu items available when you're Control-clicking in a sheet.

- **Cut/Copy/Paste:** Cuts, copies, or pastes whole records in a sheet. Use them, for example, to duplicate records. Pasting always pastes as the last record in the sheet.
- **Delete Records/Columns:** Deletes the selected record(s) or column(s).
- **Edit Columns:** Displays the *Column Editor* to allow editing and managing the columns.
- **New Column:** Creates a new column in the sheet.

- **New Record:** Creates a new record in the sheet.
- **Duplicate Record:** Duplicates a selected record in the sheet.

Note: Despite any visual or behavior similarities with Microsoft Excel, sheets are not spreadsheets and therefore do not provide functions and formulae.

## IMAGES, AUDIO, AND VIDEO



DEVONthink uses macOS core technologies to display images and videos, and also play audio. Interacting with images uses the same controls you are used to, like pinch to zoom in and out, two-finger tap to zoom to width, and even two-finger rotation in 90 degree increments. Audio and video files display the familiar macOS controls.

Images, audio, and video files can be imported. Also in DEVONthink's *Sorter* you can capture the screen to an image, as well as record audio and video notes.

## EDIT PANEL

When working with images, double-clicking opens an edit panel with three tabs. The *Adjust* tab allows you to do some basic image editing, like adjust exposure, saturation, adding a sepia tone, etc. The *Effects* tab provides some simple pre-defined image effects. The *Details* tab displays metadata about the image, including [EXIF metadata](#) and a map of the geolocated origin of the file.

## NAVIGATION BAR

For audio and video files, there is a special option available in the navigation bar: the playback time. This displays the current time of playback (audio and video only). Also, if you click the time it shows a *Go to time* function so you can quickly jump to another time in the playback.

## CONTEXTUAL MENU

There are a few media-specific contextual menu items available, excluding common ones related to magnifying the image. In addition to the standard controls, e.g., volume, playback position, etc., some of the same contextual menu options are found in the action menu for these files.

- **Rotate Left/Right:** Rotate the image left and right. The image is saved in an uncompressed TIFF format.
- **Flip Horizontal/Vertical:** Flip the image on the chosen axis. The image is saved in the lossless TIFF format.
- **Edit:** Opens the [Edit](#) panel.
- **Copy Frame Link:** Copies a URL linking to the current playback time in the file.

- **Copy Image:** Copies the image or current video frame to the clipboard. When used with an image, an uncompressed TIFF file will be captured.
- **Set As Thumbnail:** Makes the current frame the thumbnail of the video (only available when the video is not playing).

Note: Edits to or copying an image via contextual menu items produces an uncompressed TIFF file. These files can be quite sizable, but are also saved in a lossless format.

## OFFICE DOCUMENTS, EMAIL, AND OTHERS

DEVONthink is the central hub for many environments, from home to office, and you are likely using several other applications along side it. As often mentioned, DEVONthink supports importing many file types; some editable, some not. If a format is text-based, like XML files, they may be directly editable. But even if a file is not editable, it may be searchable. This section is obviously not exhaustive in what kind of files can be added to DEVONthink, but if you have a format we haven't discussed, the easiest thing to do is just try importing it. Any failures will be reported in [Window > Log](#).

### EPUB

[EPUB](#) files (.epub) are popular format, commonly used for digital books (including our manual). While they can't be edited in DEVONthink, their contents are fully indexed and searchable, making them a viable resource in your databases.



## OFFICE DOCUMENTS

Word processing, spreadsheet, and presentation applications are common in many situations. When using the proprietary formats from these applications, like Microsoft Word documents (.doc, .docx) instead of rich text files, these formats aren't directly editable in DEVONthink. However, it does support importing and indexing these particular document types:



- Apple Pages, Numbers, and Keynote from Apple's [iWork suite](#)
- Word, Excel, and Powerpoint from Microsoft's [Microsoft Office suite](#).
- Files from supporting applications, like the [OpenOffice](#) or [LibreOffice](#) suites.
- Files from the popular macOS [Mellel](#) word processor.

These formats can only be imported, however it is possible to add template files of these formats. For example, you may have a boilerplate Pages document you often use. This could be added as a template to quickly add to your database, then opened and edited in Pages. See the [appendix](#) for a bit more information.

## EMAIL

Imported email messages have their contents indexed (excluding the contents of attachments). This makes them searchable and a valuable asset, whether you're archiving email for personal or professional reasons.

## TEXT AND BEST ALTERNATIVE

For some document formats, e.g., email messages or Word documents, DEVONthink only allows you to select and copy text in the *Text Alternative* view. If DEVONthink is able to interpret and convert the document format, you can use the  and  buttons in the [navigation bar](#) to switch between a view that allows you to select, copy, and drag text or the Quick Look view showing a more "accurate" view of a file.

Also note you will have text-related contextual menu items available when you can make text selections in the *Text Alternative* view of a file.

Note: For uneditable formats, DEVONthink uses Quick Look to display the file, provided an appropriate Quick Look plugin or application providing one is installed. If a document you want to view in DEVONthink does not show a Quick Look preview, you may need to contact the maker of the source application and ask them to add Quick Look support.

## CONTEXTUAL MENU ITEMS

Contextual menu items aren't available in Quick Look views, e.g., Control-clicking in a Powerpoint file. Also, when using the *Text Alternative* mode for these files, some but not all contextual items related to text selections are available. [See also p. 205ff](#)

## LINKED FILES

On occasion we get an inquiry about importing files with linked assets, like Adobe Illustrator or InDesign files. While it's certainly

possible to import these, the links will be broken if you try to import a folder structure containing the links. Groups in DEVONthink do not exist in the file system, so the groups that are created when you import a folder structure from the Finder don't exist as real folders in the database. The files inside the folders are imported into the internal structure of the database, so their paths are not pointing to the groups in the database.

If you want to include these kinds of files in your databases, you could keep the linked files external and only import the documents. You could also index the complete folder structure containing your files into the database, leaving them where they are in the Finder. Since the paths aren't changing, the links would be preserved when you open the documents.

# IN & OUT

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DEVONthink is not an island. It integrates with the rest of your Mac and iOS devices in a variety of ways to make it easy for you to add data to DEVONthink. There are even some options that allow you to share your data with friends and colleagues.

## IMPORTING & INDEXING

When it comes to getting data into your databases, there are two fundamental methods to consider: importing and indexing.

### IMPORT

Importing copies files into the internal structure of the database. This creates a portable, self-contained database that can be moved as a single file. This is the default behavior of DEVONthink.

When you drag-and-drop files or choose [File > Import > Files and Folders](#), files are copied. This does leave the originals in the Finder, which you can choose to keep or delete. But note there is no connection between the files any longer. Editing the file in the Finder after importing has no effect on the file in the database, as the database has a copy of it. If you want to access and edit the files, do so from inside DEVONthink.

If you hold the ⌘ Command key when you drag into DEVONthink, the file will be moved, not copied, into the database. If you are using [File > Import > Files and Folders](#), you can click the *Options* button and enable *Move Originals to Trash*.

### INDEX

Creates links to files outside the database. This allows more direct access to the files in the Finder by other applications or people. A common example is people using a cloud service like Dropbox and indexing folders in the local Dropbox folders. DEVONthink indexes the content and metadata for use with classification and other content-related functions, just as it does with imported items.

Finder files and folders can be indexed using [File > Index](#). You can also hold `⌘-⌥` while dragging and dropping into your database. When you do, you will see a curved arrow indicating the items will be indexed.

While indexing may seem like an obvious choice, you should carefully consider if it's the best option:

- Indexing is best used on fairly static locations, i.e., you are not moving the items around in the Finder and renaming them. However, if you do index a location, you can update it in the database and it will change to reflect the changes in the Finder. Updating can be done by opening an indexed group in the database, or selecting one and choosing [File > Update Indexed Items](#).
- You should only index local data, e.g., on the local hard drive or connected drives. DEVONthink doesn't support indexing data that resides only in the cloud.
- While indexing doesn't copy the contents of the files, the full text of text-based is stored. This can still take up a considerable amount of space.

Lastly, if you are indexing content and want to sync the databases between devices, please review the [Indexing and Sync](#) section.

Due to the flexibility of DEVONthink, it's possible to have a database containing both imported and indexed files.

**Note:** While DEVONthink can handle large amounts of data, it is inadvisable to import or index uncurated data, like entire hard drives or your Home directory. You should be judicious in what you put into your databases.

## DRAG & DROP

The Mac has always been an environment with rich drag-and-drop support.

DEVONthink is a well-behaved citizen in this regard. Here are some ideas:

### IN

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

- Drag files from the Finder into a database. Holding certain command keys will allow you to copy, move, or index them. [See also p. 35ff](#)
- Drag files from the Finder to DEVONthink's dock icon. Files will be sent to the [default destination](#).
- With applications supporting drag-and-drop, you can drag data between them and DEVONthink. For example, you can drag messages from Apple Mail into your database or DEVONthink's dock icon.
- Inside DEVONthink, you may be able to drag content from a file into the database. If you have an email message with an attachment imported into your database, you can drag the attachment out as a separate file.
- With some file types it's possible to select text and drag it out to create a new file. DEVONthink will attempt to create the most appropriate file type.

**Note:** With the last two options, you may be able to drag-and-drop content between files.

## OUT

DEVONthink isn't just a receiver; it also allows drag-and-drop of its files too.

- For email applications lacking good automation support, drag a document onto its dock icon or into a draft email to attach it.
- Drag documents or groups to the Finder as a quick export option. When you do this, DEVONthink will apply tags you've added to the documents also to the exported files as Finder tags.
- If you need to upload a document to a website, drag the document in the database to the page or the upload sheet, if the site requires it. Note that groups can't be added this way. You'd need to drag the group to the Finder first, then to the site.


## INSIDE

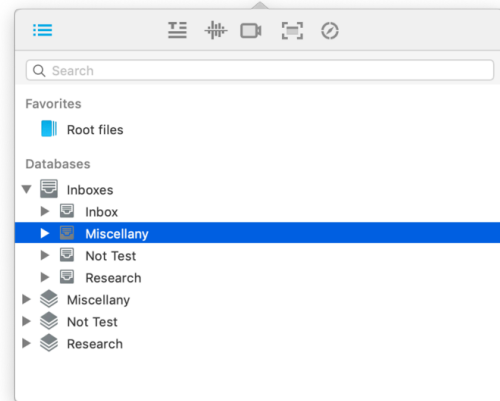
And obviously DEVONthink allows dragging database items inside itself for reorganization.

- **Dragging:** Moves items, by default.
- **Option-Dragging:** Duplicates items to the dropped location.
- **Option-Command-Dragging:** [Replicates](#) items to the dropped location. Note you cannot replicate a file to the same location as the dragged file.

## SORTER

The [Sorter](#) is a multi-purpose utility built into DEVONthink providing options for adding files and creating various types of notes. When enabled in [Preferences > Sorter](#), it

is found in the menubar at the top of your screen — displayed as *DEVONthink* or the  nautilus icon — or docked to the side of your window. Details about the views and controls of the *Sorter* are covered in the [Sorter](#) section of the Windows chapter.



The first view of the *Sorter* is the *Home* view. Access your favorites, or browse and search for groups in the open databases. Double-clicking a found group will open it in a new DEVONthink window. [Drag and drop](#) files on the *Sorter* to quickly file them in a favorited group, an inbox, or a location you've found in a search. When docked, the *Sorter* will lock open during a search so you can easily drop files into the desired location.

The *Sorter's* other views allow for quick and easy note creation. It supports these note types:

- **Take Note:** Create text notes in plain or rich text, Markdown, or formatted note formats.
- **Voice Note:** Record an audio note.
- **Video Note:** Record a video note with the built-in camera.
- **Screen Capture:** Snap screen captures with the option of adding metadata, e.g., tags, rating, etc. directly into DEVONthink.

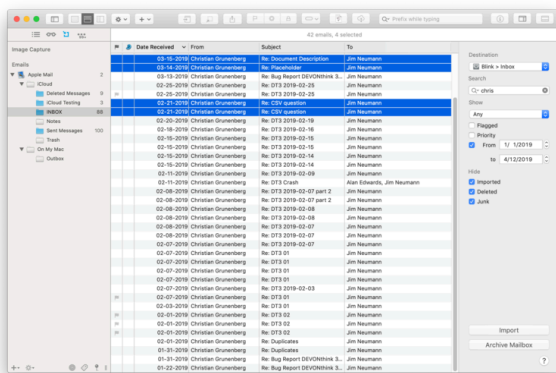
The *Sorter* allows you to clip web content as well. It also functions as the interface to the *Clip to DEVONthink* browser extension.

- Clip content from the current page in your default web browser.
- Clip content from a URL detected on your clipboard.
- Clip content via *Clip to DEVONthink* or enter information and a URL manually, if desired.

All these methods give you the option of capturing the content in a variety of formats, with or without extra metadata, directly into your DEVONthink databases.

## ARCHIVING EMAIL

Email is an important item in many situations, both professional and personal. DEVONthink allows you to import email messages directly from supported email applications. It also allows you to import UNIX mailboxes (.mbox files) that can be exported from some other email clients.



Beyond dragging and dropping emails from an email client, you can select the *View > Import* command to show the *Import* sidebar. DEVONthink currently supports the following email applications:

- [Apple Mail](#)
- [Microsoft Entourage](#)
- [Microsoft Outlook](#)

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

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

In addition to speeding up the transfer of email messages from Apple Mail to DEVONthink, the plugin adds an *Add to DEVONthink 3* command to the *Mailbox* and *Message* menus of Apple Mail. This allows you to directly archive selected messages or mailboxes to your DEVONthink database while inside Mail. When accessing a supported mail application via AppleScript, automatic fetching of new mail is disabled. This does not happen when you use Apple Mail with the DEVONthink plugin installed.

Note: We highly recommend you install the Apple Mail plugin as the AppleScript implementation in Apple Mail is slow. Also, due to limitations in the AppleScript interface of Mail it's not possible to archive complete conversations from Apple Mail without the plugin installed.

## IMPORT OR ARCHIVE

When it comes to archiving email, the question arises: "Do I use import or archive?" Here's the simple way to understand it:

- **Import Email:** While *Import* can be used on a mailbox, it is generally used on selected, individual emails. This is especially useful when using a filtered view, e.g., filtering by a date range or recipient. You'd select those files and use the *Import* option.
- **Archive Mailbox:** As the name implies, this command can only be used on selected mailboxes. The mailbox will be imported into a special *Emails* group. DEVONthink will attempt to preserve the mailbox structure shown in the email application. This is very useful for archiving a mailbox and keeping it up to date. Since previously imported emails are excluded from the mailbox view, subsequent visits to the Import sidebar will only show newly received emails. Using the *Archive Mailbox* option will import only those new emails into the existing *Emails* group in the database.

Depending on the settings in [Preferences > Email > Conversations](#), DEVONthink can attempt to import complete conversations and optionally group them.

Note: Email threading is not an exact process. There has also been no standard defining relationships between messages for a very long time. DEVONthink will attempt to thread the conversations, but cannot guarantee all related emails will be detected.

## IMPORTING UNIX MAILBOXES

UNIX mailboxes (`.mbox` files) exported from some email applications, e.g., [Thunderbird](#) or [Postbox](#), can be imported into your database. There is no mailbox structure in these exported files so multiple mailboxes have to be exported and imported separately. They can be imported into DEVONthink in one of two ways:

- **File > Import:** Use [File > Import > UNIX Mailboxes](#), then select the `.mbox` file in the *Open* dialog and press *Open*. This will import the messages into a group in the current location.
- **Drag and Drop:** Drag and drop the `.mbox` file onto DEVONthink's dock icon to import the messages into your database.

## PROBLEMS IMPORTING OR MOVING EMAILS

Briefly discussed in the [Appendix](#), the UUID is a value given to each item in DEVONthink. It is unique to each item and more than one item can't have the same UUID. When email messages are imported, they are given such an identifier based on metadata from the actual email. This means you can't import the same message into a database more than once, as that would result in more than one file having the same UUID. This will be shown in DEVONthink's [Window > Log](#). It can also cause issues when moving messages between databases. If you already imported messages into a database and forgot you did, trying to move the same email into it will fail.

In [Preferences > Email](#) you can enable *Previously imported will become replicants* to import the messages into the same database

as replicants. However, this still will not allow moving messages into databases already containing those emails.

## REPLYING AND SENDING

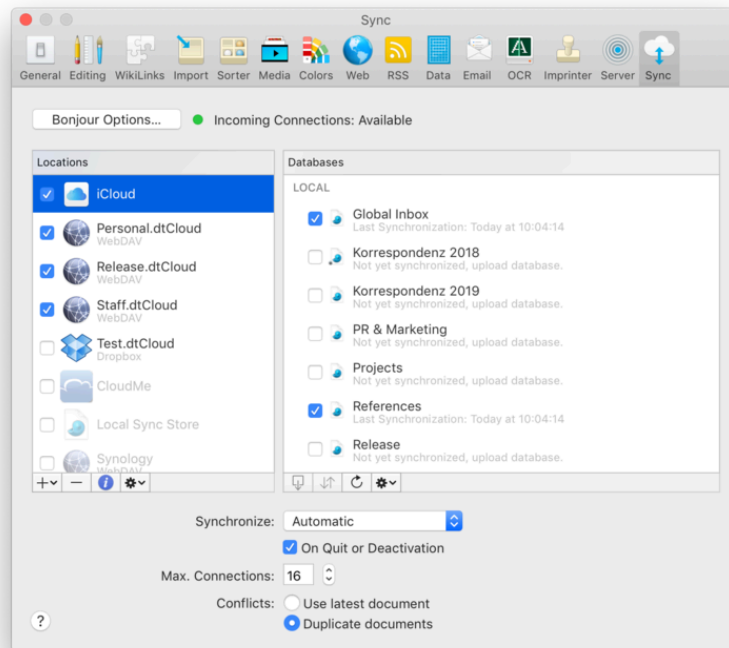
To reply to an archived email message, Control-click it in the item list and choose Send Reply. A draft message will be composed in your default email application.

Choose Send by Email to email a selected document from the item list.

Note: The inter-application communication capabilities of the email client you are using determine how well these two commands work. If the commands aren't producing the expected results, check with the developer about what kind of interactions they allow between applications.



# SYNC



Before we discuss particular details of sync methods, take a moment to check out the [Preferences > Sync](#) section. This gives you an overview of the preference pane where syncs are set up. Additionally, you will find a short glossary of sync-related terminology in the [Appendix](#).

## SYNC SIMPLIFIED

Sync is an incredibly simple concept. You have a database on one machine. You want that database on another machine. From the machine with the database, you upload the database to a sync location accessible from both machines. On the machine without the database, you'd access the same sync location and import the database. This way, every device, Mac or mobile, has a local copy

of a database. Changes are made locally then synced through the sync location to the connected devices.

The only variations are:

- If the second machine already has a opened copy of the database, you will have the option to merge with the sync data in the sync location.
- Using a Bonjour sync, in which you'd import and sync directly between devices.

**What is a sync store?:** A sync store is a folder on a server or service (the 'sync location') that DEVONthink uses to keep syncable copies of databases. Sync stores can contain multiple databases. Some people use one sync store for all databases. Some use one store per database. Some use one store for

a group of databases, and another store for another group. It's up to you and your specific use case.

**What is a 'copy of the database'?:** One detail to understand about syncing: Only true copies of a database will sync together. Two databases having the same name but created independently are not the same database. These databases will never sync together. This is also why you shouldn't create a database on the receiving machine, hoping to "fill it up" with data from the source database.

If you copy the database (.dtBase2 file) between machines, that is clearly a true copy of the database. Also, importing a database via sync logically yields a true copy of the database. True copies are databases that have the same internal identifier (UUID).

**Security:** Regarding the privacy of your synced data, all sync methods allow you to specify an optional (but recommended) encryption key for a sync location. This key is used to "scramble" or "descramble" the sync data using AES-256 encryption and the data is stored in an encrypted state. All databases synced to this location will sync encrypted data. Note you must use the same encryption key when setting up the same sync location on other devices running DEVONthink or DEVONthink To Go.

**Note:** Bonjour syncs don't allow you to explicitly specify a key, but the sync data is encrypted by default.

**Sync pattern:** That's it. Every sync is conceptually the same. The differences you find are the requirements of the particular

sync method, e.g., Dropbox, and are covered below. Bonjour and local sync stores show a few more specific (but simple) steps, but they all follow the same essential pattern:

- Enable a location (with or without an encryption key)
- Upload a database
- Enable the same location (using the same encryption key, only if specified)
- Import or merge a database

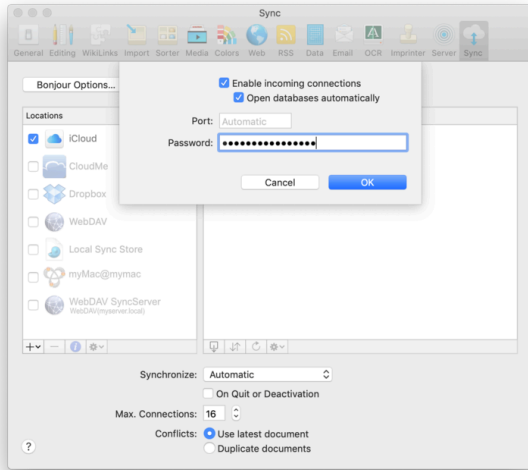
## INDEXING AND SYNC

Often people [index content](#) from the local repository of a cloud service like Dropbox. The question then arises: "If I have my data on Dropbox' servers and I sync to Dropbox via DEVONthink, aren't I just using twice the space?" The answer is practically, yes. In the *Show Info* for a sync location in [Preferences > Sync](#) there is an option *Synchronize contents of indexed items*. Unchecking this will sync only the metadata for the files, not the contents. However, you should only disable this option if:

- You are syncing another Mac, linked to your Dropbox account, and having the local Dropbox folder in the same relative location. The default location is ~/Dropbox. If the locations are different, the files will appear as missing on the second Mac.
- You are not syncing with our mobile application, [DEVONthink To Go](#). DEVONthink To Go does not support indexed items. Also, if you are using the *Download Files: On demand* option in DEVONthink To Go, you could never download the contents since the contents are not present in the sync location.

For the most flexibility, it is advisable to ensure you have enough storage space for syncing.

## BONJOUR



**Bonjour** (also called a direct connection) is technology you are almost certainly already acquainted with. If you have a wireless printer or scanner and notice how your Macs and mobile devices can see those devices by name with no setup by you, they are using Bonjour. Bonjour is a way for devices, or services like DEVONthink's sync, to broadcast its presence on a network without requiring technical know-how by the user.

When it comes to syncing, a Bonjour sync deals directly between devices. One device acts as a server, the other a client to that server. The participating devices must be on, running DEVONthink or DEVONthink To Go, and on the same network. There is no intermediary location where data is stored. This is much faster than uploading all data to some server on the internet and downloading it again on another device. But,

when you leave your office and you haven't synchronized your databases, you'll need to wait until you come back another day.

**Note:** Bonjour does not function over VPNs. This is a technical limitation of the technology, not DEVONthink.

### Bonjour Setup:

- **Step 1:** On the machine acting as the server, open [Preferences > Sync](#) and press the *Bonjour Options* button.
- **Step 2:** Click *Enable Incoming Connections* to use this Mac as a Bonjour server of its databases. Optionally, have closed databases open when a client initiates a sync.
- **Step 3:** Enter a mandatory password. This password is required for other devices to act as a client of DEVONthink's. If you are working with an IT department who has assigned a port for you, or you have a port you'd specifically like to use, enter it in the *Port* field. Otherwise, leave this blank and DEVONthink will assign one for you.

The Mac with Bonjour enabled should now be visible as a sync location to other devices on your local network. On the other devices, enable it, enter the password, and you can import databases or sync existing databases directly with it.

**Note:** You should never use more than one device as a Bonjour server for a given database.

## LOCAL SYNC STORE

A local sync store is a specialized folder containing sync data on your local machine or connected drives and servers. This is a very

fast and reliable sync method for Mac-to-Mac syncing. You can use one sync store to sync multiple databases or create more than one, e.g., one for a particular group of databases.

Setup a new local Sync store:

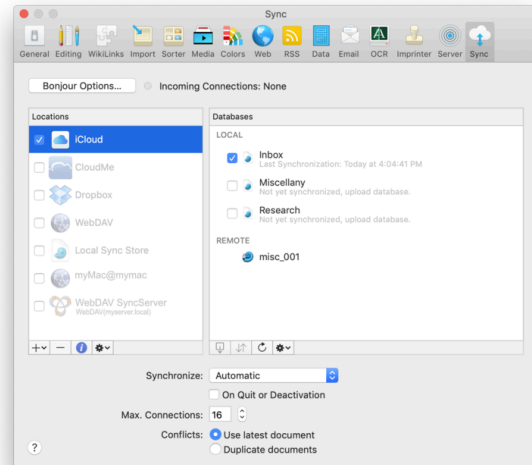
- **Step 1:** Open [Preferences > Sync](#) and enable the *Local Sync Store* option. If you already have one created, click the + button and choose *Add Local Sync Store*.
- **Step 2:** In the sheet that appears, navigate to the location you want to save the sync store. Enter a name and an optional encryption key, if desired. Then press *Add*.
- **Step 3:** When the location is created, select it and enable the databases you want to sync in the *Databases* list on the right.

Setup an existing local sync store:

- **Step 1:** Open [Preferences > Sync](#) and enable the *Local Sync Store* option. If you already have one created, click the + button and choose *Add Local Sync Store*.
- **Step 2:** In the sheet that appears, navigate to the location the existing sync store is located. Click the sync store to capture the name. If an encryption key was specified, enter it. Otherwise, leave it empty. Then press *Add*.
- **Step 3:** When the location is created, select it and you should see any importable databases listed in the *Remote* section of the databases list.
- **Step 4:** Double-click a database you want to import, saving it to a safe location, e.g., `~/Databases`.

Note: Due to technical limitations, a local sync store currently cannot be used for Mac-to-mobile syncing. iOS doesn't have the ability to mount file servers.

## ICLOUD



As most Apple devices are logged into your Apple ID, iCloud is the simplest method to set up and sync with. Since it's logged into your personal account, it can only be used for syncing with your own devices. If you want to keep your databases in sync but not share them with others this is a great choice. We strongly recommend an iCloud plan with enough storage. Here are the simple instructions to set it up.

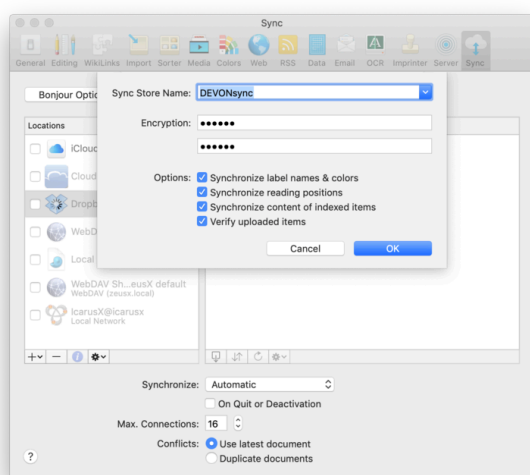
iCloud Setup:

- **Step 1:** Open [Preferences > Sync](#) and enable the *iCloud* option.
- **Step 2:** Enter an optional encryption key, if desired. If you are already syncing to this location from another machine, you must enter the same key you used. Leave it blank if you didn't use an encryption key.
- **Step 3:** Select the sync location and enable the databases you want to sync in the

Databases list on the right. If you already synced from another machine, double-click a database in the *Remote* section, saving it to a safe location, e.g., ~/Databases.

One thing to realize with iCloud syncing, the sync is done locally. After sync is finished, iCloud uploads to Apple's servers, then to devices using your Apple ID. This means databases may not be immediately available to sync on the other devices. The initial sync requires patience, as DEVONthink has no control over the speed and reliability of iCloud's process. It syncs to the iCloud folder, iCloud does the rest.

## DROPBOX



If you have a [Dropbox](#) account you can use it just like you'd use WebDAV. DEVONthink creates a private folder for its sync stores and so keeps its data separate from your photos and other documents. Of course it does not get access to anything except its own files. Dropbox and DEVONtechnologies respect your privacy.

The setup for a Dropbox sync location is essentially the same as for iCloud. However, there are two differences of which to take note:

- **Sync Store Name:** You will have to enter a *Sync Store Name*. This is where the sync data will be stored in the `Apps` folder of your Dropbox account. You can add more than one sync location, if desired.
- **Authentication:** Since the Dropbox sync connects and syncs directly with the Dropbox servers, you are required to authenticate the connection. When you first enable a Dropbox sync location in DEVONthink your default web browser will open and ask you to allow access to our sync engine. This will need to be done on other devices you are setting up this same Dropbox sync location. Once the authentication is allowed, you subsequently can add and remove other Dropbox sync locations in DEVONthink.

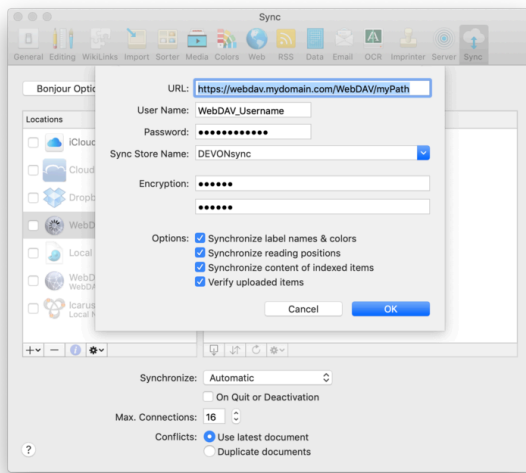
If you are using a Dropbox sync and also the Dropbox application, it is advisable to exclude the DEVONthink `Packet Sync` folder inside the `Apps` folder from being synchronized with your Mac. This keeps the Dropbox app from wasting valuable disk space and bandwidth by re-downloading all changes you've made to your databases, and from spamming you with notifications.

- **Step 1:** Click the Dropbox icon in the menubar, click the *Action* button (gear icon) and choose *Preferences*.
- **Step 2:** Select the *Sync* tab and click the *Choose folders to sync* button.

- **Step 3:** Select the `Apps` folder, and uncheck the `DEVONthink Packet Sync` folder.
- **Step 4:** Click the `Update` button and okay the removal of the local data.

Note: Due to Dropbox' API restrictions, you cannot sync between Dropbox accounts, .e.g., between yours and a colleague's account. Also it is not possible to connect DEVONthink to more than one Dropbox account at a time.

## WEBDAV



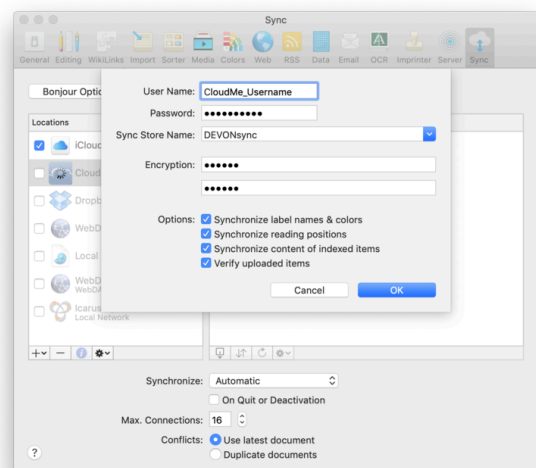
If you run your own [WebDAV](#) server, your ISP offers it as a service, or you have subscribed to an online service such as [CloudMe](#), this might be for you. Generally, if you can access the WebDAV server with `Go > Connect to Server` in the Finder, you should be able to connect DEVONthink to it.

Your data is stored in encrypted [sync stores](#) on the server. You can keep all your devices in sync at any time as long as you have internet access.

Setting up a WebDAV connection follows the same simple pattern and allows you to specify a sync store name. But there are a few parameters that must be entered to make the connection:

- **URL:** This is the address of the WebDAV server you are connecting to. Make sure you use the proper protocol of `http` or `https`. Also make sure the URL is a complete path, as required by the server or service you're using.
- **Username/Password:** Enter the defined or provided username and password to allow DEVONthink to connect to the WebDAV server.

Note: A typical complete path would be similar to: `https://myWebDAV.com/WebDAVvolume/WebDAVFolder`. The volume and folder are generally case-sensitive. Specifying a WebDAV folder may be required if the server doesn't allow you to write to the root of the volume. Check with the manufacturer or provider.



**CloudMe:** A European cloud service offering WebDAV services, there is a built-in template for syncing with it. Just enter the username

and password you use to log into the service, enter a store name, and DEVONthink will connect with a proper WebDAV URL for you.

**Other cloud services:** If you are interested in other cloud services to sync with, services offering WebDAV connections should be supported. Check the [FAQ](#) or [Support](#) pages to see if it's supported.

**Rolling your own:** It is possible to run a WebDAV server on your own. Some NAS drives, e.g., Synology, have WebDAV capabilities and you can run a WebDAV server by repurposing an older Mac. Even some more full-featured packages like [OwnCloud](#) or [NextCloud](#) can be set up for WebDAV services. However, these options can provide more technical challenges in setup and administration beyond the scope of our support.

**Note:** With Dropbox and WebDAV connections, if you are connecting to a location you've already synced to, a list of existing sync stores is displayed in the *Sync Store Name* dropdown. This way you can quickly add the proper sync store instead of trying to remember the exact name you gave it.

## Q & A

**I'll just put my databases in (name your cloud service):** This is not data-safe and never has been. The mechanisms used by cloud services are not compatible with package files, like our databases. Due to the number of broken databases we've seen over the years, DEVONthink will neither sync nor open

databases stored in these locations. We suggest keeping them in a folder in your home folder, like `~/Databases`.

**I want to access my databases from one**

**location:** Along with the previous note, this is not possible. Databases are stored locally and must be imported to the current machine.

**I want to find my files in the sync location:**

Your databases do not "live in the cloud". Sync does not copy your databases and files into any sync location. It transmits raw, chunked, and optionally encrypted DEVONthink-specific data, only useful to DEVONthink and DEVONthink To Go. You cannot go into a sync location and retrieve a specific file, and neither could anyone else, friend or foe.

## TROUBLESHOOTING

Generally, syncing is a transparent and reliable process. However, poor network conditions, unreliable servers, etc. may cause unexpected issues. Please refer to the [Sync](#) section of the Troubleshooting chapter for some possible fixes.

## CAPTURING PAPER (IMAGE CAPTURE)

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

**OCR:** DEVONthink optionally 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's AI engine.

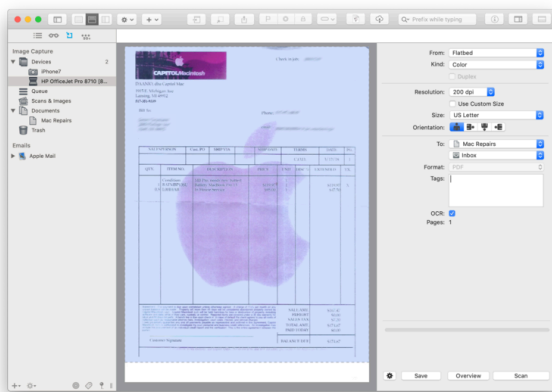
OCR on scans is generally enabled by default. For best results we recommend scanning at 200 dpi in color and with 100 percent quality.

Note: If you are using a Fujitsu ScanSnap, see the next section.

To capture paper using an Image Capture compliant scanner open the *Import* sidebar using *View > Import* or selecting the icon over the sidebar. 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 from a connected

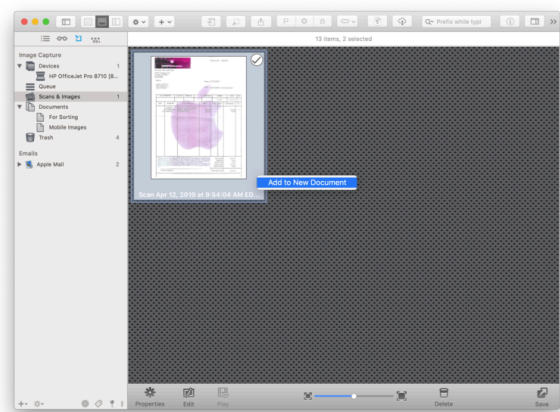
iOS device or camera. The main pane shows an interface similar to what Apple Image Capture uses.

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 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 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.

## 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.

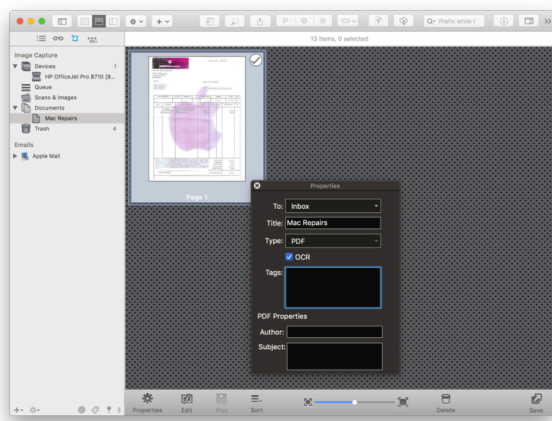


If you do not need to collect multiple pages into a single document, all you need to do is set the scan's properties and send it to your database. In the properties window, choose a destination group (the *Global Inbox* is set by default) and enter title and tags. You can also choose if you want to save this scan as an image or PDF document. Check *OCR* to convert this scan to a searchable PDF after importing. 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. Control-click to use the contextual menu for adding or deleting documents. Alternatively, use the *Documents* button at the bottom of the sidebar.

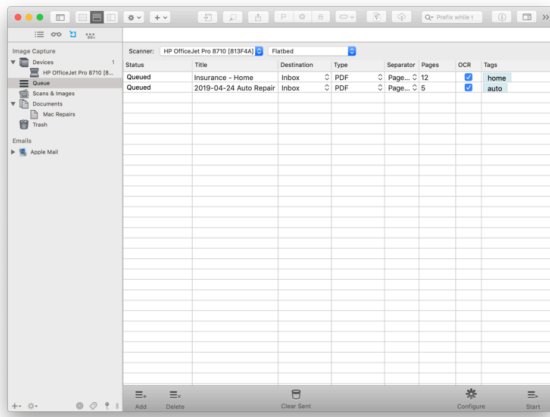
Add pages by dragging them from the *Scans & Images* section to the document in the sidebar. Rearrange added pages if desired and set the document properties by clicking the *Properties* button. This is similar to single scans in the *Scans & Images* section. Use the *Sort* button to reverse the sort order or shuffle pages, e.g., when scanning all front pages first, then the back pages. Choose *Sort and Merge Documents* to merge two documents where one contains all the odd pages and the other all even pages.

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

## TRASH

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

## QUEUE



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

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

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. If you want to convert the scans to searchable PDFs, you should choose a resolution of minimum 300 dpi. Then click the *Start* button to start scanning. Finished steps are marked as "Sent". Click *Clear Sent* to remove them from the list.

## CAPTURING PAPER (OTHER OPTIONS)

DEVONthink works with the [Fujitsu ScanSnap](#), [ExactCode ExactScan](#), and other scanners that are not directly supported.

In addition, you can add already scanned pages to your DEVONthink database and [manually convert them to searchable PDFs](#).

### USING A SCANSNAP SCANNER

DEVONthink recognizes scans sent to it from the [Fujitsu ScanSnap Home](#) application or the older ScanSnap Manager software. To send scans automatically to your databases, simply add DEVONthink to ScanSnap Home or ScanSnap Manager as the application to use for opening completed scans. The scanner app will send the created PDFs to DEVONthink which in turn will import the document.

ScanSnap's scanning software can provide already OCR'd PDFs. However, if you don't enable this option, DEVONthink can perform the OCR on the incoming scans if you've enabled [Preferences > OCR > Convert Incoming Scans](#).

### USING AN UNSUPPORTED SCANNER

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

the finished scan with another application, e.g., an image editor. Change the default application for the scan to DEVONthink.

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

Note: In the settings for the scanning application you're using, it is best to leave the default location for the output path, often `~/Pictures`. Do *not* set the path to DEVONthink's *Global Inbox*, as this can lead to errors when DEVONthink tries to import a scan that is not completed yet.

## IMPORTING EXISTING FILES WITH OCR

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

To import an image file while applying OCR, choose *File > Import > Image with OCR*. Click the *Options* button to choose the output format and whether to send the original to the system trash after importing. The image will be processed with DEVONthink's OCR engine and be imported to the database in the format chosen. If you have enabled *Searchable PDF: Set metadata after text recognition* in the [OCR](#) preferences, DEVONthink will show the metadata entry

when the OCR process is completed (before the file is actually imported to the database).

The date of the created document is set to the date of the original file. Thus, for archival purposes, the searchable document is identical to the original one. The modification date is set to the current date and time to reflect the addition of the searchable text layer. If you're importing a PDF, any keywords in the original file are retained and used as tags.

## EXTENSIONS AND BOOKMARKLETS

DEVONthink provides a sharing extension (requires OS X Yosemite or later), a web browser extension, as well as bookmarklets, for conveniently clipping information from other applications into your DEVONthink database.

### SHARING EXTENSIONS

Sharing extensions let you "share" data with other applications or web services such as Twitter and Facebook. Extensions are mainly intended for the sandboxed App Store environment where applications can no longer easily communicate with each other. When you access the *Share* menu in a compatible application, you should see an option, *Add to DEVONthink* that allows you to send data from the application to DEVONthink.

**Installation:** Just as other sharing extensions are installed, open *System Preferences > Extensions > Share Menu* and enable the

option for DEVONthink. It should now be available in any sharing-enabled application's *Share* menu.

Note: The data being sent is controlled by the sending application, not DEVONthink. If there are issues with the data received in your database, please contact the developer of the application to report your findings.

## BROWSER EXTENSIONS

Browser extensions add functionality to your favorite web browser. DEVONthink's *Clip to DEVONthink* extension usually appears as a 🐙 nautilus icon in the web browser's toolbar. When clicked, the *Clip to DEVONthink* will identify data about the current page in the browser and open the [Web Clip](#) section of the *Sorter*. Here you can simply select the location to clip the content or add optional metadata, like tags, label color, etc.

**Installing:** The *Clip to DEVONthink* for Safari extension is installed by DEVONthink by default. The extensions for Firefox and Chrome can be installed from our [Extras](#) download page. You can also access these pages via the [DEVONthink > Install Add-Ons](#) panel.

Note: While there is no direct support for other browsers, some allow you to install Chrome extensions. This may allow you to install our browser extension in those browsers as well.

## BOOKMARKLETS

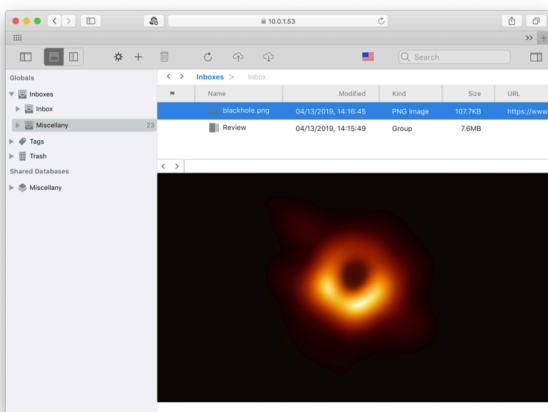
Similar in function to a browser extension, but much simpler, bookmarklets are special bookmarks that execute some JavaScript to capture the current page or selection in the browser. To use one of the bookmarklets, load the page you wish to archive or clip text from in your web browser. When the page is fully shown, select the bookmarklet in your *bookmarks bar*. Instead of loading another page as normal bookmarks do, the bookmarklet adds the selected text or the whole page as text, bookmark, HTML code, web archive, or PDF to DEVONthink's default destination.

**Installing:** Bookmarklets can be installed from our [Extras](#) download page. Typically, the bookmarklet can just be dragged and dropped to the browser's bookmarks toolbar. However, you may need to Control-click the bookmarklet and copy the code to add it manually, if the browser requires it. We have provided separate bookmarklets, one for each type, currently supporting capturing: bookmark, web archive, HTML, PDF (paginated or single page), plain text, or the selection as plain text.

Note: Due to increased security in macOS, Apple Safari will prompt you to allow launching DEVONthink when using the browser extension or bookmarklets. Other browsers allow you to make a persistent choice about this behavior.

## WEB SHARING

DEVONthink allows you to give others on the local network access to your databases using a standard web browser on any operating system (including Windows and Linux). The embedded web server provides an interactive web interface that allows defined users to interact with the shared databases. Here are the first steps to getting started using this powerful feature.



## SECURING YOUR SHARED DATABASES

Before you start sharing your data it's a good idea to check the security settings.

To enhance the security for the databases you broadcast, you define users and give them per-database permissions. You will also set a certificate for the server, so the connecting users can validate they are connecting to a safe server. These items are set in [Preferences > Server](#). Users will only be able to interact with the databases based on the permissions you give them, including disallowing them even to see certain databases.

Note: Depending on the certificate settings specified in the preferences, a warning about an invalid certificate may be shown when users access the web sharing. This is especially true when using a self-signed certificate. While this warning is something to be suspicious of when browsing in general, you and your users can accept it in this case.

## SHARING A DATABASE

**Start and stop the server:** Once the certificate and users have been set up to your liking, press the *Start* button to start the server. You can also select the [Tools > Start Server](#) command or choose the *Start Server* option in DEVONthink's dock icon. If the server is running, these will display *Stop* instead.

**Share your server's address:** Once the web server is started, you will see links at the bottom of the preference pane. These are the active links you will share to individuals you have defined as users. One option is to Control-click the link, select *Share* from the contextual menu, and share it via your preferred method. You can also use *Copy Link* and paste it where you need to. Lastly, you can click and drag the link directly to many applications, like Apple Messages.

The person who receives your link will open the page, login with the username and mandatory password you've defined for them, and have access to the databases you want them to see. If you have specified a port in the preferences, your users may be able to add a bookmark to their browser for quick access.

Note: We believe in data privacy and hope you do too. Browsers may present options to save login credentials. Some may even save the credentials by default. We are cautious of the first and not a fan of the second. If the user is on a shared computer, consider what access other users could have if using these options to save credentials.

## USING THE WEB INTERFACE

The interactive web interface imitates the look-and-feel of DEVONthink in many ways, but in a condensed form. Contrary to a static web site, it only loads once; clicking buttons or links does not reload the whole page but dynamically updates it. This also means you should use the *Back* and *Forward* controls in the user interface instead of the ones in your browser's toolbar.

Similar to the DEVONthink, the web interface is divided into panes: toolbar, sidebar, item list, and view/edit pane. But note some operations, e.g., deleting or organizing items, are dependent on the permissions you've been given for the specific databases.

**Sidebar:** The sidebar is where you can navigate the databases' inboxes, groups, tags, and trashes in the sidebar. You can even drag items from the item list to reorganize things.

**Item List:** Selecting items in the sidebar will display the contents in the item list. When using the standard preview position, the list can be sorted by clicking the column headers. There are options to enable or disable them in the contextual menu. Items can be dragged, handily for filing loose documents into groups. Double-click groups to display

their contents in the item list. For quick navigation, press the < and > arrows to go back and forward to visited locations in the databases. You can also click the locations in the path bar above the item list to jump to a parent location.

**View/Edit pane:** Displayed below the item list or to the right, depending on the preview choice made in the toolbar, this pane will attempt to display the contents of the selected file. Clicking and dragging the divider bar allows you to resize the pane, relative to the item list. A select number of file types, e.g., plain text, formatted notes, and Markdown files can be viewed and edited in this pane. When the *Info* inspector is shown it will display as a pane on the right side of the view/edit pane.

Note: Due to the limitations of browser technologies, some file types cannot be displayed.

**Toolbar:** Some handy options are available in the toolbar, including switching the position of the view/edit pane, adding some metadata, e.g label or rating, to a selected item, and creating groups and a few document types. It also has controls for uploading new documents and downloading currently selected ones. Lastly, it gives you access to two powerful options: the *See Also* pane and the search field.

**See Also:** When you show the inspector pane, the second view is a [See Also](#) view. This displays potentially related files in the current database you are viewing.

**Search:** Searching the viewable databases can be done in the search field. Enter search terms, including using [search prefixes](#) to focus the searches. For example, you can do a search for `text:housing tags:government`. If you want to restrict where you're searching, select *All Databases* or a specific database to search in.

Descriptions of the controls in the user interface can be found in the [Web Sharing](#) section of the Windows chapter.

## ACCESSING YOUR DATA OVER THE INTERNET

Web sharing is best used on a local area network (LAN). But there may be situations where you want to share the database to users that aren't on your network. While we can't provide specific support due to the differences in equipment and environments, we have provided a simple guide you can try.

To access your database from outside your network, you need to make your Mac "visible" to the outside world. In general, when you are using a DSL or cable modem, you are also using a router. Routers create an intranet that your Mac is connected to and "route" traffic between the internet and your personal intranet. Now, you need to create a route from the outside leading to the Mac sharing your database. This offers a port on the outside that is directly connected to the port on which DEVONthink is publishing.

If everything goes well, you will be able to access your database using an address like: `http://xxx.xxx.xxx.xxx:port`, where `xxx.xxx.xxx.xxx` is your current public IP address. (Note: This is your router's address

on the internet, not your Mac's.) Next, `port` is the outside port number leading to your published database.

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

- **Step 1:** Begin by determining your Mac's public IP address. This can be done by visiting a web site like <https://www.whatismyip.com> from your machine.
- **Step 2:** Determine the port on which DEVONthink published on your Mac. You set the port in *Preferences > Server*. To publish on the internet, enter a port number here and do not let DEVONthink set it automatically as the port number may then change every time you open the application.
- **Step 3:** Determine your Mac's private IP address. The IP address is usually of the form `10.x.y.z`, `192.168.y.z` or `172.16.y.z`. You can find your Mac's private IP address by going to the *Network* preferences panel in *System Preferences* and looking it up under *TCP/IP* for the interface you are using (usually *Built-In Ethernet* or *Wi-Fi*).
- **Step 4:** Decide on a public port for DEVONthink. The port should be in the range 1025-65500. We suggest that you use port 8080, which is traditionally a default port for private web servers.
- **Step 5:** Configure port forwarding on your router. The steps to do this vary

from router to router, but all of them require you to provide these details: Public port, private destination IP, and private destination port. You found the private destination port in step 2, and the private destination IP in step 3, and you selected the public port in step 4. If you are in doubt about how you configure your router to do port forwarding, you need to consult the manual that came with your router. It is usually done through a web-based interface or custom-built administration application. For instance, AirPort routers can be configured using the AirPort Admin Utility.

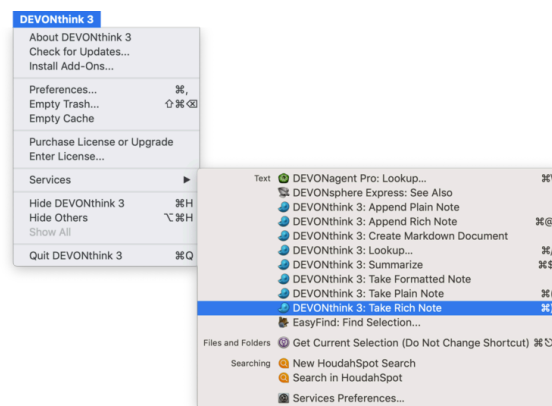
- **Step 6:** Save the configuration changes on your router, and restart the router if required. At this point, you are ready to connect to your DEVONthink from the outside.
- **Step 7:** From the remote computer, open a web browser and enter the address as follows: `http://xxx.xxx.xxx.xxx:port`, where `xxx.xxx.xxx.xxx` is the public IP address you found in step 1, and `port` the public port you selected in step 4. Press ↵ Return and you should get presented with your database's web interface.

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

## SERVICES

The *DEVONthink* > *Services* menu gives you access to special commands provided either by other applications, such as TextEdit

or Safari, or by services extensions such as DEVONtechnologies' [WordService](#) or [CalcService](#). Also, DEVONthink publishes its own services in the *Services* menu.



## DEVONTHINK SERVICES

DEVONthink installs several services for copying or summarizing selected text, capturing a web page, or searching for documents in your databases.

- **Add to DEVONthink 3:** 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 as a plain or rich text note from any application that support services. Taking a rich text note also copies images and clickable links. If the source document is a web page or a news feed, DEVONthink 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](#), and other web browsers.
- **Append Plain/Rich Note:** Adds selected text as plain or rich text to the last note taken using the DEVONthink *Services* menu items.



- **Lookup:** Opens the search pane in DEVONthink with the selected text copied as search term.
- **Summarize:** Creates a new note in DEVONthink's inbox with a summary of the selected text. DEVONthink uses all documents in the open database for determining what's important and what's not. The summarization settings in [Preferences > Editing](#), define whether the summary are be based on sentences or paragraphs.

If you want to assign hotkeys to services, go to *System Preferences > Keyboard > Keyboard Shortcuts > Services*. Do note that application hotkeys can override hotkeys set here. Try to make sure to specify unused key combinations in your shortcuts. Also, due to the way macOS loads menus, you may need to show the *DEVONthink > Services* menu once before the hotkey will become active.

## PDF SERVICES

Another way to get files into DEVONthink is using PDF services. Installing DEVONthink's service adds a *Save PDF to DEVONthink* option to the *PDF* button of the print dialog in any Mac application. This allows you to print a paginated PDF directly to your database.

To install the PDF service, select [DEVONthink > Install Add-ons](#) and check *PDF Services* in the dialog window. Then click *Install* and the option should now be available.

**Printing to your database:** To "print" (save) a document to DEVONthink as a PDF, open it in its creator application (this could even be DEVONthink 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* from the menu. A PDF will be printed and sent to DEVONthink. Depending on your choice in [Preferences > Import > Destination](#), the file import into the *Global Inbox* or let you choose the destination group.

Note: This requires an installed printer to work properly.

## THIRD-PARTY APPLICATIONS

DEVONthink offers many standard ways to integrate with third-party apps including drag-and-drop of common data formats, copy-and-paste, and AppleScript. In addition DEVONthink comes with special arrangements for applications often used together with it.

- **Bookends:** Choose [File > Import > References from Bookends](#) to import Bookends references as rich text documents with a back link to the original item in [Bookends](#).
- **Evernote:** Choose [File > Import > Notes from Evernote](#) to import selected [Evernote](#) notebooks.
- **Tinderbox:** Copy notes in [Tinderbox](#) and choose [Data > New > With Clipboard](#) to create plain or rich text copies of the notes

in DEVONthink including backlinks and tags.

- **Yojimbo:** Choose *File > Import > Items from Yojimbo* to import all items from [Yojimbo](#). Items without URLs are backlinked.
- **Apple Mail:** DEVONthink adds its own menu commands into Apple Mail to facilitate

importing selected message or mailboxes into your databases. [See also p. 38ff](#)

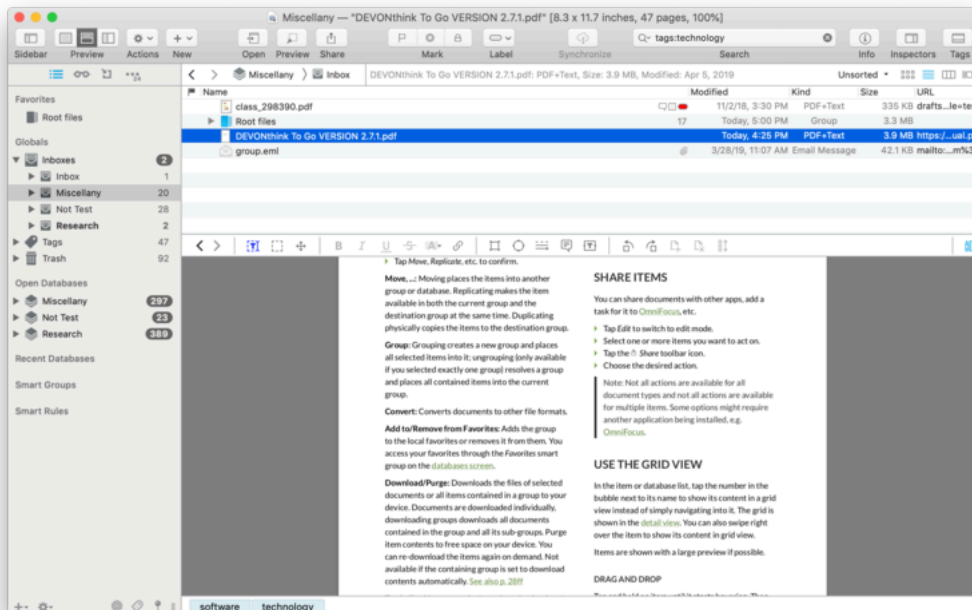
# WINDOWS

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DEVONthink 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



The main window is split into simple sections, some of which will be familiar from other applications. In fact, as we introduce the components of the window you'll see DEVONthink has many familiar elements in it. We start off with the fundamental panes you'll use.

## VIEW/EDIT PANE

When You launch DEVONthink you will see an empty pane at the bottom of the window reading *Nothing Selected*. This is the *View/Edit* pane, a preview pane displaying the currently selected document. This pane gives you a view of the content of compatible documents. It also allows you to work on compatible files directly in the main window when the pane is shown. Or you can hide the preview, perhaps if you want to concentrate on information about a group of documents.

You can toggle the pane's visibility in the [View > Preview](#) menu or via a toolbar button.

Layouts:

- **Widescreen:** The *View/Edit* pane is displayed to the right of the item list, an option common in many Mac applications.
- **Standard:** The *View/Edit* pane is displayed under the item list. This is a bit more traditional but very useful on smaller screens, e.g., MacBooks.
- **None:** Hides the *View/Edit* pane. Note you can still select any file and press the space bar to preview it in a Quick Look pane, as needed.


As noted above, DEVONthink allows displaying and editing, and even creating, some file types. Please refer to the [Documents](#) chapter for more information on this and other components related to the *View/Edit* pane.

## ITEM LIST




When you open a Finder window, you are presented with a list of files in a certain location. The view may be icons or a list, etc. but you are still just viewing the contents of a folder, hard drive, etc.


DEVONthink is no different in this respect. When you open a main window, you will see a list of groups and documents in the current location. Clicking on or opening other groups shows their contents. Smart groups, just like the Finder's smart folders, also display their contents in an item list. The item list also supports familiar operations like drag-and-drop between groups, copy and paste, group and ungroup, contextual menu items when you Control-click, etc., just as you've done in the Finder.

**Views:** Again, taking a cue from the Finder, the item list allows you to display your documents in some familiar views:

- **Icon:** For the more visual folks, we have the  *Icon* view. This displays the thumbnails of the documents with just their name. You can choose [Show Details](#) to display some additional metadata in a widescreen view. Change the size of the thumbnails with the slider in the information bar, noting this will affect the amount of metadata shown as well when details are shown. Double-clicking groups behaves just as double-clicking a Finder folder, displaying the contents in the current or a new window, depending on the *Double-click opens groups in a new window* checkbox in [Preferences > General](#). Note this view is



best used without a preview or in standard layout.



- **List:** Behaving much like Finder's *List* view, the  *List* view shows a list view of the items with metadata columns. Drag the columns left and right to reorder them to your liking. Sort them by clicking the column headers, switching between ascending and descending each time you click. Control-click the headers to add or remove columns. Or make these choices from the [Tools](#) menu.
- **Columns:** The Mac OS X Finder received the *Columns* view from its NextStep counterpart, then iTunes adopted it for browsing music. DEVONthink's  *Column* view functions in the same way. This option works best with a preview in standard layout, for quickly viewing selected files, but you can also use *Show Details* to display metadata and the file's thumbnail. Expanding the width of the column by dragging the separator will scale the thumbnail, if desired.
- **Cover Flow:** An iTunes feature that found its way to the Finder, and DEVONthink is  *Cover Flow*. Similar to the *Icon* view but with dynamically created thumbnails, i.e., the displayed image is generated from the contents of the file. This side-scrolling item list can be useful when making visual assessments of documents. It is best used with a standard layout or without a preview displayed.

All these views can be easily changed in the [View > View](#) options, as well as the quartet of icons  on the right-hand side of the [Information bar](#).

**Sort:** In addition to sorting the item list by clicking column headers or using the *View > Sort* menu, you can also choose a sort method in the *Sort* dropdown menu in the information bar. By default it reads *by Name*. Also, notice there is a *Customize Metadata* command in the *Tools > Columns* menu, the contextual menu, and this menu. Select it to fine tune what columns are available to display, including any [custom sets](#) you've created yourself.

**Visual Cues:** DEVONthink provides a few visual cues applied to items in an item list.

- **Duplicates:** Duplicate files display their name in blue or the  icon, depending on your setting in [Preferences > General > Mark duplicates and replicants in color](#).
- **Replicants:** Replicant files display their name in red or the  icon, again depending on the preference setting.
- **Unread:** Unread items, including groups with unread items in them, display their name in bold.

The *Flag* column shows the state,  flagged or unflagged, or the  unread status of items. Clicking in the flag column toggles the flagged state. If an item is unread, a circle will appear in this column. If you have a group containing a mix of flagged and unflagged items, a dash will appear in this column, showing an indeterminate state.

Additionally, DEVONthink displays special icons to the right of item names for attributes like Spotlight comments, reminders, etc. A key of the item icons can be found in the [Iconology](#) section of the appendix

**Contextual menu items:** When you Control-click in a Finder window, a contextual menu appears with a host of commands for you to choose from. DEVONthink's item list also has a contextual menu available. The commands shown depend on what is selected and in what pane you're using. A list of the commands can be found in the [Contextual Menu Items](#) section of the appendix.

Note: To keep visual consistency and make some functions more broadly accessible, item lists are used throughout DEVONthink's interface, so you'll see them in some other panes. But note some functions, like specific contextual menu items, may change, depending on the specific pane you're using.

## TOOLBAR

At the top of most Mac applications you encounter, including the Finder, you will see the toolbar. For people who prefer working with tracking devices, e.g., mice, trackpads, etc., the toolbar allows you to have quick access to some functions without having to go through the menus. DEVONthink also provides a toolbar in main and [document windows](#).

The toolbar comes pre-installed with a handy default set of buttons, including the [search field](#) (see below). It can be customized via the [Tools > Customize Toolbar](#) command. You can also Control-click the toolbar and choose this command from the contextual menu. Add, remove, and reorder these items to suit your particular needs. On a side note, if you want to quickly reorganize items on the toolbar,

hold the ⌘ Command key and drag the item to its desired location, or off the toolbar to remove it.

If you're looking for a little more space for your toolbar, or even a little less, you can choose to display the toolbar as *Icon and Text*, *Icons Only*, or *Text Only*. Do bear in mind, the *Icon Only* view will not show the current document's title or icon.

A list of the available toolbar items is available in the [Toolbar](#) section of the appendix.

## SIDEBARS

Seen in scores of applications for many years, a sidebar is a top level organizational structure, typically found on the left side of an application window. The Finder or Apple Mail sidebars are perfect examples of this. Looking at them, you should see the immediate similarities with DEVONthink. However, unlike most other apps, DEVONthink has multiple sidebars, each with their own special functions covered a bit later in this chapter.

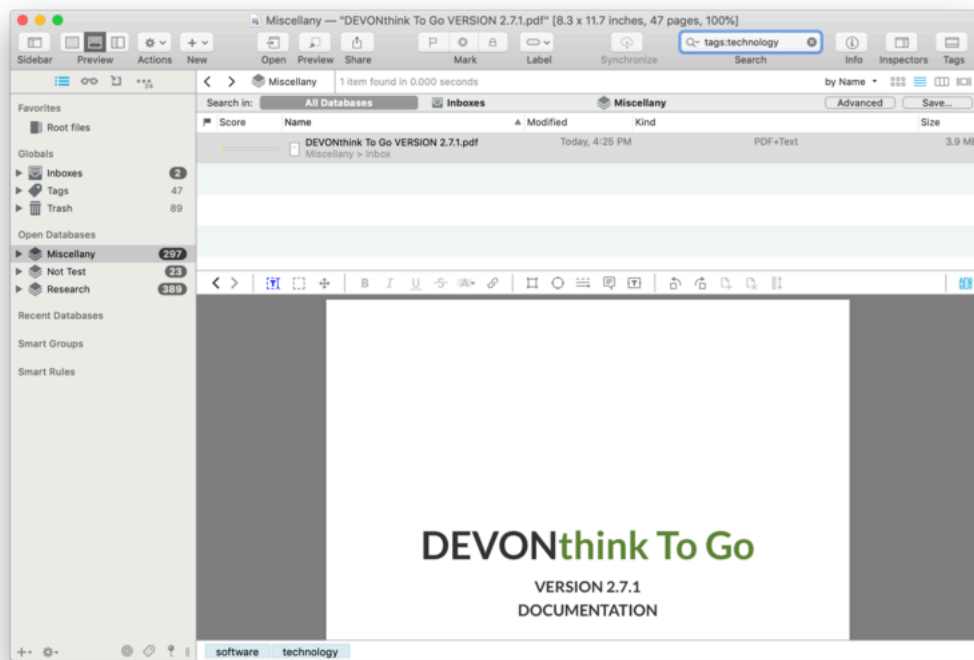
## INSPECTORS

In some applications, extra information about files is shown in a pane on the right side of a window. DEVONthink also provides such a pane in its main windows with individual sub-panes called *Inspectors*. For example, data about the name, tags, type, etc. of a selected file are available in the *Info Inspector*. Unlike other applications, it gives you multiple inspectors presenting more information and functions, all docked in the inspectors

panes. This gives you quick access to all the inspectors in one unified window, especially helpful on smaller screens.


The inspectors are individually discussed in the [Inspectors](#) chapter.

## SEARCH PANE



Storing information is a useful thing, but it's more useful when you can find things too. DEVONthink offers a strong search function for finding items in your databases, all integrated into a main window.

In the toolbar is a search field for entering your search terms. Type in a word and the search pane appears showing any matched items — and yes, it's another item list supporting the different views and sort methods discussed above. Additionally, the *View/Edit* pane can be shown to display selected results. For contents-based searches, the search terms will be highlighted in the preview, whenever possible.

**Search options:** In the search field, you will notice a  magnifying glass icon. Click this icon to see where to search, list the ten most recent search queries, one choose among the following options:

- **Live while typing:** Enable this option to search while typing or disable it to search only when you press ↵ Return.
- **Prefix while typing:** This option assumes an asterisk wildcard at the end of the last search term.
- **Ignore Diacritics:** This allows you to ignore special marks on letters, like umlauts or accents.
- **Fuzzy:** This uses fuzzy-logic to expand the possible matches DEVONthink makes. For example, `hello` and `hullo` would be matched.

**Search prefixes:** Anything you type into the search field will be treated as searching in all possible attributes. However, if you want to focus on specific attributes, e.g., file types or tags, the search field supports prefix operator searches, similar to Spotlight. Common examples are searches like `name:DEVON` or `tags:tech, sync, separating`



multi-valued attributes like tags with a comma. There are a wide variety of prefixes available, as well as different prefix operators. A complete list of these items is included in the [Search Prefixes](#) section of the appendix.

In addition to search prefixes, DEVONthink supports Boolean operators, parenthesis for grouping terms, and quotes to match specific terms. Read more about operators and how to use them in the [Search Operators](#) section of the appendix.

**Search scopes:** After you've done a search, you will also see a bar above the search results allowing you to choose the scope of the search. The scope is the "where" you're searching. You will be shown *All Databases*, *Inboxes*, the name of the current database, and the name of the current group, if you're currently viewing one. Choose one to expand or limit where DEVONthink is searching.

**Advanced and save:** To the right of the search scopes, you will see two buttons. Clicking the *Advanced* button displays the criteria of the current search. You can modify the search with the same kind of controls used in the Finder's smart folders, as well as some other applications with advanced search methods. Note these controls are also used in creating [smart groups](#) and [smart rules](#).

If you have done a search you'd like to use again, press the *Save* button. Enter a name and DEVONthink will create a smart group for you. If your search scope is in a group, the smart group will be created there. If you are searching a specific database, the smart group is created in the root of the database.

Searching inboxes or all databases creates a global smart group, shown in the *Smart Groups* section of the [Navigate sidebar](#).


Note: The search index contains alphanumeric characters as well as the following symbols: \$€£¥%\$

## PATH BAR

On the left side of the main window, just below the toolbar, is the *Path Bar*. This is a specialized bar displaying a crumb trail of your current location in a database. For example, if you are in a nested group, it will show something like `Coding > AppleScript > WWDC > 416`, beginning with the current database.

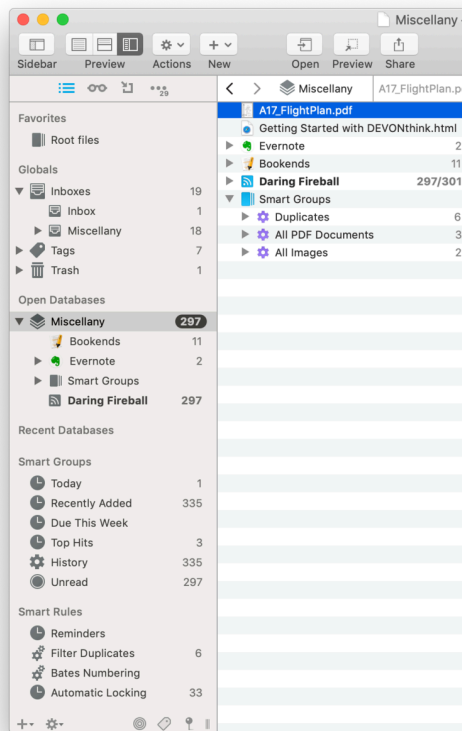
Each item in the crumb trail is a live link, so you can click it to jump to any parent folder or back to the top level of the database. This bar also has < and > buttons so you can navigate back and forth between locations you've visited in this window. As an added feature, click and hold one of these buttons to be shown a list of previous locations you've visited, just like in a web browser.

## INFORMATION BAR

Another specialized bar, the *Information Bar* displays some basic metadata about the current selection. This includes: filename, type, size, and the date the file was last modified. If no or multiple items are selected, the number of items selected and the total number of items in this location will be reported. As mentioned previously, this bar also hosts the *Sort* dropdown and the  view icons.

## SIDEBAR: NAVIGATE

The *Navigate* pane is the default sidebar where you will access to your databases, tags, items located in *Favorites*, etc. Additionally, you have access to some specialized items: global smart groups and smart rules.



When interacting with items in the *Globals* and *Open Databases* sections of this sidebar, you will only be shown databases and groups. Selecting one them will display its groups and files in the item list. This allows a clear view of the group structure in the sidebar, while still allowing you to interact with the contents in the item list. This also means the actions of the sidebar sections are a bit more locked down, by design. For example, you can't select multiple tags in the *Tags* section. These actions can be performed on the items in the item list.

**Contextual menu items:** All sections have some common contextual menu items as well as some section-specific ones. Any specific items that may require explanation are discussed in their respective sections.

Note: While all these sections are useful in day-to-day use of DEVONthink, you can still collapse any of them by hovering to the right of a section header and clicking *Hide*.

## FAVORITES

There are many times we have specific databases, groups, or documents we return to, again and again. The *Favorites* section allows you to create shortcuts to quickly access any of these kind of items. Drag a group or a document to this section's header and you'll see a curved arrow on the cursor. Drop the file and you have a new favorite. An option to *Add to Favorites* is available in the [contextual menu commands](#) of most items in DEVONthink. Use *Remove from Favorites* when Control-clicking on already favorited items to remove them.

Select an item in *Favorites* to quickly access it. If an item was last viewed without a preview, it will be displayed in its own window. If you see a favorite is greyed out, it means the containing database isn't open. Double-clicking the item will open the database, if possible, and display the item.

Drag items in the section to reorder them. Groups in *Favorites* behave as normal groups, so you can drag items into a favorited group for quick filing. This includes using `⌘` and `⌘⇧` to duplicate or replicate items while dragging and dropping to them.

Note: Favorites only support one level of content, so you can't group or nest items here.

## GLOBALS

The Globals section provides quick access to three locations common to all databases: the *Inbox*, *Tags*, and the *Trash*. If you click a top level section, e.g., *Inboxes*, you will see a combined view of items in the inboxes of all open databases. This can be especially handy if you want a view of all the tags you're using in your databases. Click the disclosure triangle next to each section to show the locations for each open database, allowing you to access the locations on an individual database level.

**Inboxes:** The inbox of a database, like the real-world counterpart on an office desk, is where incoming, unfiled items are kept. Every database has one by default and you can see the name of the database each inbox belongs to. The *Global Inbox*, shown just as *Inbox*, is a special, always-open database present in every installation of DEVONthink. This is highly useful when quickly capturing data, e.g., web clipping, screen captures, etc., without stopping to file things. You can then go back later and file these items at your leisure.

**Tags:** The *Tags* section provides quick access to all the tags you are using or tags within individual databases. If you click the top level tags, the item list will display all the tags you've created. Open this group and click on a database's name to show its tags. If you like

to create nested or hierarchical tags, you can drag and drop existing tags in the sidebar or the item list.

Typically you will use the *Tags* bar in the [View/Edit](#) pane or the [Info Inspector](#) or *Info* popup to apply or create tags. You can also drag items in your database to the individual tags. When you create a tag it will automatically appear in the *Tags* group of the database you're in. If you want to create new tags to be used later, select the *Tags* group for the database and choose [Data > New > Tag](#). Or from the contextual menu, Control-click the database's top level *Tags* group or an existing tag and select *New Tag*.

If you find yourself in a situation with multiple tags you'd like to merge, select the *Tags* group for the current database to view the tags in the item list. You can then select the tags there and choose [Tools > Merge Items](#).

Removing entire tag groups can be done by dragging and dropping to the sidebar's trash. From the contextual menu, you can choose *Move to Trash*. You can delete tags in the item list as well. One thing to note: When you delete a tag, the original file in the database is preserved. What you see in the database's trash is the replicant that was created in the tag group when you added the tag.

**Trash:** Every database has its own individual trash. This allows you to see, and potentially retrieve, items you've deleted from your individual databases. Just as with the real-world trash bin, we do suggest you empty your databases' trash regularly. It is not meant as another filing location, and items marked as [missing](#) will still register as a problem for a database. Select the trash,

the top level or individual database's trash, and choose [DEVONthink > Empty Trash](#). The command is also available in the contextual menu, when Control-clicking a trash. Trashed files are not deleted completely from the machine but are put into the system trash.

## OPEN DATABASES

This section is where you see and access any databases you have currently open. Click the database's name to display items in the root of the database. Clicking the disclosure triangle allows you to show groups, and subsequently sub-groups in the database. As mentioned above, selecting a database or group will display its subgroups and files in the item list.

There are a few specific contextual menu items worth mentioning. These commands are also found in the [File](#) or [Data](#) menus:

- **Copy Database Link:** Copies a link to the current database.
- **Database Properties:** Also available in the Inboxes section, this displays information about the chosen database.
- **Close Database:** Also available in the Inboxes section, closes the chosen database. In the case of encrypted databases, the encrypted volume will be ejected as well.
- **Delete Database:** Deletes the chosen database to the system trash. This includes its cache and Spotlight index as well.
- **New Window:** Opens a new main window for the chosen database.

- **Rename:** Change the name of the chosen database. This can also be done in the [Database Properties](#).
- **Show in Finder:** Reveals the database file in the Finder.

## RECENT DATABASES

The *Recent Databases* section provides quick access to reopen closed databases. This will list the last ten recently closed databases. Double-click any databases you'd like to open.

## SMART GROUPS

The global smart groups function the same as local [smart groups](#), i.e., the ones in your individual databases, but generally their scope is all open databases. This allows you to have reusable searches targeting all your open databases, e.g., all Markdown documents in all databases created in the last month. These global smart groups can be modified to target more specific locations, but such a smart group would be better suited as a local smart group, i.e., in the particular database. DEVONthink comes with some pre-installed global smart groups:

- **Today:** Shows all documents added or modified today.
- **Recently Added:** Shows all documents added in the last week.
- **Due This Week:** Shows all documents with a [due date](#) set for this week.
- **Top Hits:** Shows documents opened more than five times in the last 30 days.
- **Unread:** Shows all documents marked as unread.

You can create a smart group from the contextual menu or the + button at the bottom of the sidebar. By default all open databases will be targeted. However, if you have an item selected in the *Globals* or *Open Databases* sections, the smart rule will use that location for the matching.

Control-click a smart group to *Edit*, *Rename*, *Duplicate*, or *Remove* it. You can also copy a link to a smart group, export it to the Finder, or import previously exported ones. If you'd like to convert an existing smart group into a smart rule, ^-click the desired smart group, hold the ⌘ key, and choose *Duplicate as smart rule*.

If you have exported smart groups in the Finder, double-clicking them will import them. You can also drag them to the smart rules section of the sidebar.

For more information on editing smart group properties, global or local, see the [Smart Group Editor](#) section of this chapter.

## SMART RULES

Similar to smart groups, smart rules are created, edited, and behave in a similar fashion. However, they have one distinct difference: they can act on the items matched. The smart rule matches items just as a smart group does but they perform actions when certain events take place. This makes them a very powerful way to add automation to your DEVONthink life.

DEVONthink provides a few useful example smart rules to get you started:

- **Automatic Locking:** Locks unlocked documents (excluding RSS articles), that

haven't been modified in the last 30 days. This requires user intervention.

- **Bates Number:** A specialized rule that adds the current database's name and a Bates number to a filename. The original name is preserved as a document alias.
- **Filter Duplicates:** Automatically puts duplicated items in a database's trash when you import them.
- **Reminders:** Displays the name of a document and plays the system "glass" sound when a reminder on a matched item triggers.

If you Control-click a smart rule and choose *Edit*, you will see the criteria, event trigger, and actions for that rule. Like smart groups, you can create a smart rule from the contextual menu or the + button at the bottom of the sidebar. The target of the smart rule also follows the same behavior as a smart group: all databases are targeted unless you have an item selected in the *Globals* or the *Open Databases* section of this sidebar.

Control-click a smart rule to *Edit*, *Rename*, *Duplicate*, or *Remove* it. You can also copy a link to a smart rule, export it to the Finder, or import previously exported ones. Double-clicking exported smart rules imports them, and so does dragging them to the sidebar.

In the contextual menu, notice there is also a smart rule-specific command: *Apply Rule*. This runs the clicked command on any matching files. This means it will perform its actions, even if the event trigger is not set to *On Demand*. Be cautious about using this command unless you are certain you want to affect all matched items.

There are two commands in the [Tools](#) menu related to smart rules:

- **Tools > Apply Rules:** This runs the actions of a chosen rule on the currently selected items. You can also drop items on a smart rule in the sidebar to apply its actions to it.
- **Tools > Perform Rules:** This performs the chosen rule as defined, not acting on the selection.

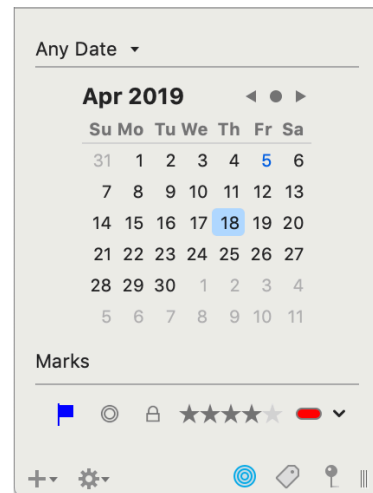
For more information on editing smart rules, see the [Smart Rules](#) section of the Automation chapter.

## SIDEBAR: FILTERS

Providing yet another way to isolate files in the item list, the *Filters* pane allows you to only show files that share common attributes. This pane, displayed at the bottom of the [Navigate](#) sidebar can be shown or hidden via the [Tools > Filter](#) menu or the trio of icons at the bottom of the *Navigate* sidebar. The pane can be resized by moving the divider at the top of the pane.

### INFO

Displayed by selecting [Tools > Filter > Info](#), the *Info* filters pane let you shows only files that share common dates, ratings, color labels, etc.



**Dates:** Click the *Date* dropdown to choose the type of date you want to filter on: *Added*, *Created*, *Modified*, *Opened*, or *Due*. Click on a date in the calendar display to only show files related to the day and type of date you selected. Use the small arrows to move backward and forward through time, and click the circle between them to quickly return to today's date.

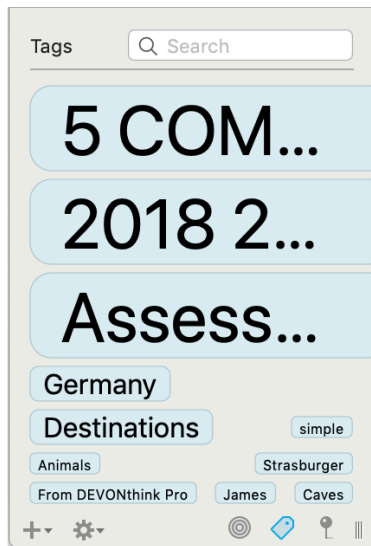
**Marks:** Choose the type of mark, or a combination of them, on which you want to filter. For example, you can click the flag and a rating of 3 to show only those files. You can filter on these attributes:

- Flagged oder unflagged
- Read or unread
- Locked or unlocked
- Rating
- Label

### TAGS

Choosing the *Tags* filter via [Tools > Filter > Tags](#) displays a tag cloud derived from the tags on the current list of files. The cloud shows the tags in varying sizes depending on the number of occurrences of each tag on these documents. The more files with a given

tag, the larger it displays. This makes it easy to identify commonly used tags. If there are no tags on the files in the current item list, *No Tags* will be displayed. Additionally, Control-click in this pane to sort the tags *by Name* or *by Count*.



To filter the files, click any tag. You will immediately see the tag cloud reduce in number and only related tags are shown. This allows you to drill down into files that share common tags, but also exposes tags that have been used with the previously selected tags.

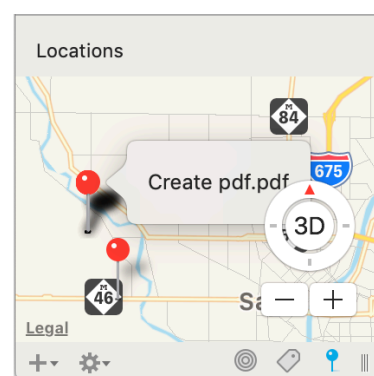
**Note:** The tags you choose will also be shown in the *Information* bar above the item list. Hovering over one of these tags displays a **X** close button at the right side of the tag. Click it to stop filtering on that tag. You can also press the *Reset* button to clear all filtered tags.

Control-clicking a tag in the tag cloud shows these options:

- **Reveal Tag:** Displays the *Tag* group in the list of tags from all open databases.
- **Remove Tag:** Removes the tag from the *Tags* groups and also from any document it was applied to.
- **Related Tags:** Displays the top two tags most commonly used with this tag. Selecting a tag from this list filters the files on that tag.
- **View>:** Allows you to switch between cloud and list view.
- **Sort:** Allows you to sort the tags by name or count.

## MAP

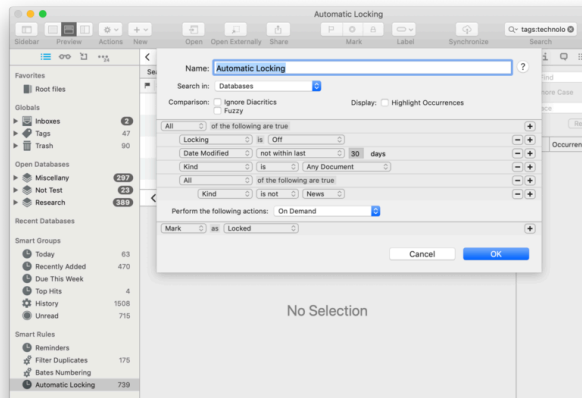
Utilizing geolocation data from your files, the *Maps* filter shows documents related by location. Shows this filter pane by selecting [Tools > Filter > Maps](#). By default, the pins on the map show the place a document was created. However, the geolocation data can be manually changed to a relative location, like the site of an historic event. (See the [Info Inspector](#) for more information on this.)



The map functions similar to Apple or Google Maps, allowing you to use familiar pinch gestures or double-click or Option-double-click to zoom in and out, panning, etc. If no files are selected, the map shows pins

for all documents with geolocation data. Selecting files displays the locations of those documents.

## SIDEBAR: SMART GROUP AND RULE EDITOR



When you create or edit a [smart group](#) or [smart rule](#), a sheet appears with options for specifying options, like the criteria to match or from where to match items.

### OPTIONS

The top section of the sheet contains a mandatory name and search location, as well as a few optional items.

- **Name:** Enter a name for the smart item.
- **Search in:** Select where you want this smart item to search.

In the *Comparison* section, you will see these options:

- **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 apply fuzzy logic to contents-based criteria, ignoring simple

typos so that instances of "hello" and "hallo" are both found.

- **Highlight Occurrences:** When used with contents-based matching, this will highlight the terms in the text of selected search results, if possible.

### PREDICATES

The second section of the editor shows the search predicates. These define criteria you want to match. Criteria may be content- or attribute-related, e.g., documents containing a specific word or groups added this week.

*Note: The predicate editor is also shown when using the [Advanced options when searching your databases](#). It is also shown in a similar sheet when you run the [Tools > Batch Process](#) command.*

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.

Add as many criteria as you need. Use the + and - buttons to add more predicates to your smart group or to delete them. Predicates can be rearranged with drag-and-drop. Hold the  $\square$  Option key and click a ... button to create a "compound predicate" also called "branch". Each branch also has its own *All* or *Any* option as well. This allows you to create very targeted searches.

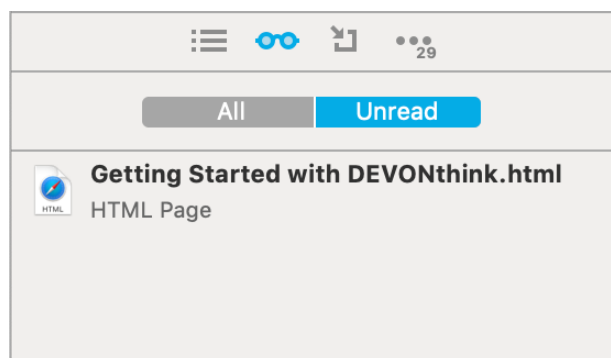


**Example:** To find all Microsoft Excel files use the condition *Filename ... ends in ... .xlsx*. To find items created in the last 7 days use the condition *Date created ... is ... Last Week*.

**Note:** In some predicates you can use wildcards, Boolean operators, phrases, and parenthesis, too. [See also p. 208ff](#)

## SIDEBAR: READING LIST

Similar to the section found in Safari (and now many other browsers), the *Reading List* provides a place to access documents and groups you've "set aside" for later consideration. The items are listed in *All* and *Unread* views.



Add files from the item list via drag and drop when this pane is visible. Alternately, choose the [Data > Add to > Reading List](#) menu item. This command may also be available when Control-clicking in an item list or in images and PDFs.

Items added to this pane will automatically appear in the *Unread* view. Selecting an item with the *View/Edit* pane visible will treat the item as read and the item will only be shown in the *All* view.

Items in the *Reading List* can be moved to other locations by dragging them to any item list in a main window. The drag operations also allow you to duplicate or replicate the files, holding  $\text{⌘}$  or  $\text{⌘}+\text{⌘}$ , respectively.

## CONTEXTUAL MENU

The contextual menu (which appears when you Control-click an item) offers these commands:

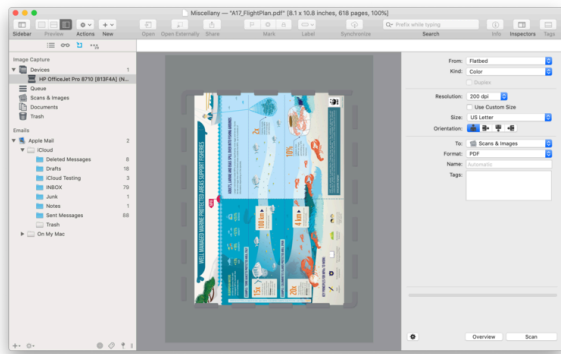
- **Open in New Tab:** Opens the clicked item in a new tab.
- **Open in New Window:** Opens the clicked item in a new document window.
- **Mark as Read/Unread:** Changes the read state of the clicked item.
- **Reveal Item:** Reveals the item in its current location.
- **Move to Trash:** Moves the item to the database's Trash. Emptying the Trash removes the file and its reference from the Reading List.
- **Copy:** Copies the selected item(s).
- **Select/Deselect All:** Selects all or none of the items, respectively.
- **Remove Item:** Removes the clicked item from the *Reading List*.
- **Clear All Items:** Removes all *Reading List* items.

**Note:** The last two options cannot be undone.

## SIDEBAR: IMAGE CAPTURE

The *Import* sidebar pane gives you access to two common sources of external data: scanning and email. Each section in this sidebar provides controls to import from any

supported scanner or a compatible email client, e.g., Apple Mail or Outlook. This makes DEVONthink a reliable companion at home, in an office, in the hands of an archivist, and many other scenarios. We will cover the scanning controls in this section. We have also provided a more practical overview in [Capturing Paper](#) section of the In & Out chapter.



Archiving documents is an important function in many situations. The *Image Capture* section of this sidebar allows you to control compatible scanners or import images from connected cameras or iOS devices.

## DEVICES

The *Devices* section allows you to choose an input device. Choosing a scanner offers different controls and options than selecting a connected iOS device or camera.

**Selected Scanner:** If you select a scanner you will be presented with controls and settings to scan your documents. This allows you to use your scanner directly in DEVONthink very efficiently. This interface should be familiar to anyone using Apple's Image Capture application or scanning in Preview.

- **Overview:** The overview of what's being scanned. When using a *Custom Size* you will define the scan area in this pane.
- **From:** Choose where you'll be inserting the paper into the scanner.
- **Kind:** Choose the color type: *Black & White*, *Grayscale*, or *Color*.
- **Duplex:** Enable double-sided scanning, if available.
- **Resolution:** Set the desired resolution of the scan. 300 dpi is the suggested resolution for most cases.
- **Page Size:** Choose a pre-defined page size or check *Custom Size* and manually change the scan area in the overview. Resize the scan area or even drag multiple scan areas on the same scan. You can also enter specific measurements. Switching to a pre-defined size will clear any custom scan areas.
- **Orientation:** Change the orientation of the final document.
- **To:** Choose where to send the document: *Scans & Images*, create a new document or use an existing one, or choose a destination in a database.
- **Format:** Choose the format for the final document.
- **Name:** Enter a name for the final document. If left empty, a date stamp will be used as an automatic name.
- **Tags:** Enter optional tags to be applied to the document.
- **OCR:** Enable OCR for the scan, if desired.

**Camera or Mobile Device:** Clicking on a connected camera or mobile device displays an item list of photos to import. These items can be imported for a variety of uses. Additionally, for documents you've

photographed, the images can be added to a scanning document (described below) and OCR can be done to create searchable PDFs. This can be very useful for everyday things like receipts to archiving historical documents.

- **To:** Choose to import items to *Scans & Images*, into a new or existing document.
- **Thumbnails/Details:** Switch between a thumbnail or a detailed list of photos. The size of thumbnails is controlled by the slider at the lower right corner of the window.
- **Delete:** Shown as a stop symbol, use this to delete selected images from the connected device. A warning will be displayed this action cannot be undone.
- **Download:** Download selected items to the location set in the *To* dropdown. Optionally, you can double-click items to import them.
- **All:** Download all the items on the connected device.

## QUEUE

Select the *Queue* option to display the scanning queue where you can pre-define documents to scan. Define parameters for each document, including: *Title*, *Destination*, *Type* (PDF or Image), *Separator*, whether *OCR* is enabled, and optional *Tags* for the finished document. This section can be very useful when batch scanning. The following controls are shown in this view:

- **Scanner:** Choose an available scanner.
- **Flatbed/Document Feeder:** Choose where you'll be inserting the paper into the scanner.

- **Document List:** Defined documents and their parameters are listed here.
- **Add/Delete:** Add or delete new document definitions.
- **Clear Sent:** Remove already processed documents from the list.
- **Configure:** Global scanner settings for color type, resolution, page size, and duplex scanning (double-sided, if available).

## SCANS & IMAGES

This section provides a temporary location for scans you haven't added to a database or a document. For example, if you were scanning related documents and were interrupted, you could continue scanning to *Scans & Images* and process them all at a later time.

- **Document List:** A list of thumbnails of scanned images. The size of the thumbnails are controlled by the slider under this pane. Control-clicking a thumbnail gives you the option to create a new document containing the scan.
- **Properties:** Change properties of a selected scan, e.g., where the scan will be sent, the title, type, tags, and optionally enabling OCR. You can also add a *Author* or *Subject* for PDF output.
- **Edit:** Change the orientation, post scanning.
- **Play:** Play video imported from an iOS device.
- **Delete:** Delete the selected scan(s).
- **Save:** Sends the selected scans to the *To* set in the *Properties* for each.

If you select a scan and Control-click it, you can choose to add it to a new document. You can also drag selected items to existing documents in the *Documents* section.

## DOCUMENTS

Documents are collections of scanned pages. Create or access existing documents in this section. Similar to the *Scans & Images* section described above, you will see a thumbnail list of documents.

- **Add Document:** Create a new empty document.
- **Save:** Sends the selected documents to the *To set* in the *Properties* for each.

Select a specific document in the sidebar to show a thumbnail view of the pages in the document. Rearrange the pages by drag-and-drop or drag pages from one document to another. Selecting a document also shows the same options as *Scans & Images* but additionally provides a *Sort* button with these options:

- **Reverse Order:** Reorder all pages from last to first.
- **Shuffle Odd/Even Pages:** Automatically switch odd and even pages
- **Sort and Merge Documents:** Choose two documents to merge their contents. One document is chosen as the starting odd page, the other as the starting even page. The pages are then interleaved into the current document.

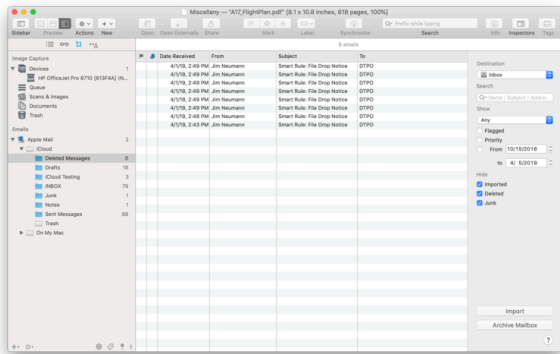
## TRASH

Any scans or documents you've deleted from the scanning interface will appear here. When you have this selected, empty the trash with the button at the lower right corner of the window.

## SIDEBAR: EMAIL

In addition to [scanning](#), the *Import* pane also provides the controls to archive emails from Apple Mail and Microsoft Outlook. While you can drag email messages individually from your email client, the *Email* section of this sidebar also allows you to import individual messages or archive mailboxes directly into your DEVONthink database.

Open the *pane* pane by choosing [View > Import](#). Here we discuss the controls used in this section. For a more practical overview of the email archiving process, check out the [Archiving Email](#) section of the In & Out chapter.



## ACCOUNTS AND MAILBOXES

The lefthand section of the *Email* section displays the active accounts and mailboxes of Apple Mail or Microsoft Outlook. Select your email client, then click the disclosure triangle to show the accounts then its mailboxes.

**Mailbox View:** When you select a mailbox in a specific account, the window will display more controls for filtering and importing messages from that mailbox. The central view shows the contents of a chosen mailbox. This is where you can select individual messages to import, if desired.

This view is separated into columns that can be sorted by clicking the column headers. The columns include *From*, *Subject*, *To*, the *Flagged* state. If you are choosing to show already imported messages, there is a special column showing those items. For emails marked as high priority, the flagged column will also show two exclamation points and the subject, etc. will show in red. Control-click in the *Mailbox* view to refresh its contents.

## FILTER AND IMPORT

When a mailbox is selected, the righthand side of the window shows options for filtering the messages displayed. It also lets you choose the location where the messages will be imported.

**Destination:** Choose the destination for the imported messages or mailboxes.

**Search:** Use this search field to search for messages by the sender or recipient's *Name*, *email address*, or the *subject line*. Note this only allows for a single term to be used. However, the search is matching substrings, so a search for *jun* would match "junk", "jungle", and "jejeune".

**Show:** Select options in this section to further fine-tune the list of importable messages, if desired. You can use:

- **Read:** Show emails messages have been read, unread, or either.
- **Flagged:** Show messages that have been flagged in the email application.
- **Priority:** Show messages that have an assigned priority
- **Date Range:** Choose a range of dates to display messages received between them.

**Hide:** Use these controls to hide certain items from the mailbox view. All these options are enabled by default, but can be selectively disabled, if needed. However, when these options are enabled it makes it easy to see only new messages, ready for import.

- **Imported:** Enabled by default, this hides messages you've already imported into the current database. As you can't import the same message into a database multiple

times, changing the *Destination* changes what messages are displayed when this option is enabled. If you disable it, already imported messages will show a checkmark next to their name

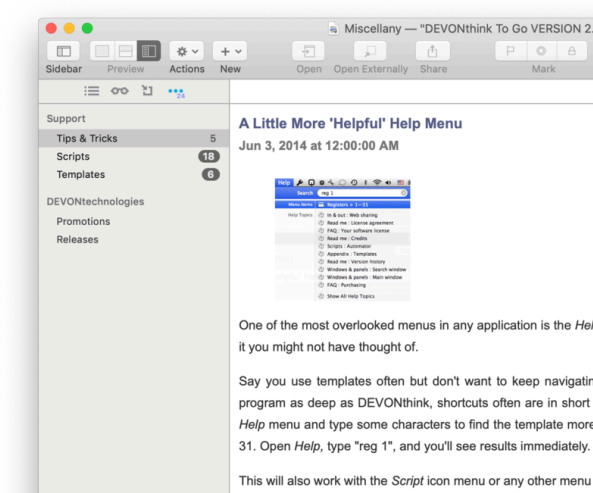
- **Deleted:** Hide messages you've put in the account's trash.
- **Junk:** Hide messages moved to the account's junk mailbox.

The last two items are buttons for importing selected emails in the *Mailbox* view or archiving the currently selected mailbox. [See also p. 38ff](#)

## SIDEBAR: EXTRAS

The *Extras* sidebar gives you a place to check for current information from us. It's an easy way to stay up to date with some of the goings on at DEVONtechnologies.

**Support:** Here you will find our recently published tips, scripts, smart rules, and templates.



- **Tips & Tricks:** This shows recent blog posts of handy tips about all things DEVONthink,

presented in a RSS feed style. To read the full article, click the article's title.

- **Scripts and Smart Rules:** From time to time, we publish publicly available scripts and smart rules. You will see a brief description and a link that allows you to install the script directly from this section.
- **Templates:** We also offer [templates](#) for a broad audience. This section lists recently published ones. As with the scripts and smart rules, a description and installation link is provided.

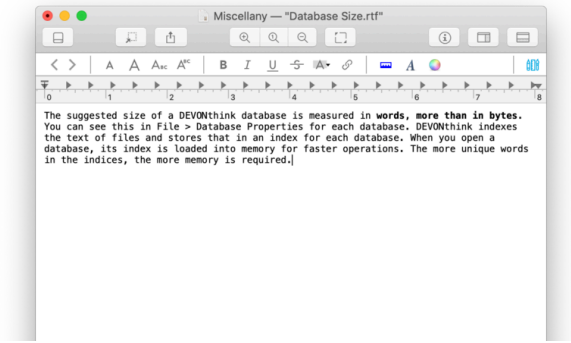
If you'd like to quickly mark all items as Read, right-click and select the *Mark All as Read* from the contextual menu.

For a view of all available scripts and templates, as well as easy installation and uninstallation, see the [Support Assistant](#).

**DEVONtechnologies:** This section provides a list of blog posts regarding updates and promotions.

Note: For the sake of transparency, DEVONthink does connect to our web server to bring you this information.

## DOCUMENT WINDOW



You can isolate a document in its own window, known as a document window. These windows are convenient for split screen work. For any editable file formats, you can open a document window by double-clicking a document in any view of a main window. Alternately, you can choose [Data > Open](#) or [Open](#) from the contextual menu to open any document in a document window. For most file types that can't be edited directly in DEVONthink, double-clicking the file will open it in the system default application. For example, double-clicking a Word file will open it in the same application that opens if you had opened the file in the Finder.

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

**Note:** Command-clicking the window title shows the document's location including the database it's stored in.

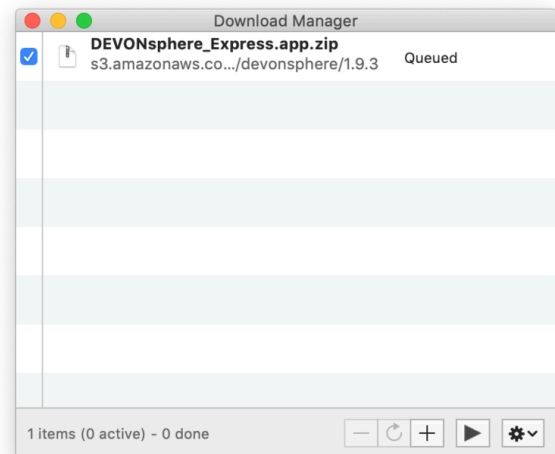
### TOOLBAR ITEMS

Similar to the main window, a document window has a toolbar at its top. The default toolbar buttons may vary, depending on the type of file being viewed in the window. You can customize the toolbar via [View >](#)

[Customize Toolbar](#), but note there are fewer options than you have with a main window. A list of available toolbar items is available in the [Toolbar](#) section of the appendix.

## DOWNLOAD MANAGER

[Window > Download Manager](#) opens DEVONthink'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. Offline archives stored in DEVONthink are also used when you visit bookmarks or open a link in a new tab and your computer is currently offline.



### 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

- A + go/stop button (play/pause icons)
- An  Action menu


## 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 + in the panel and add the URL manually, as well as a referrer, user name, and password. If *Automatic* is checked, DEVONthink creates a referrer automatically when downloading whole web sites.



You can also paste one or more URLs (copied Safari bookmarks, DEVONthink 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 in DEVONthink.

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).

## ACTION MENU

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

- **Add:** Manually add a URL 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  Backspace or  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. Note this will only pause queued items. Any in progress downloads will continue.
- **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 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 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 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 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 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.

Note: Following links two levels deep can result in very large downloads.

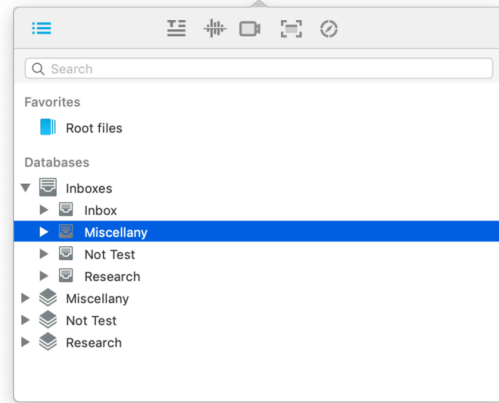
## THE SORTER

The *Sorter* is a multi-purpose popup that allows you to quickly add content to your databases, even when DEVONthink isn't the active application. Depending on the option you choose in [Preferences > Sorter](#), it will appear in the menubar at the top of your screen or docked to the left or right side of your screen. When shown as a menu bar icon, you can choose to display it as the word *DEVONthink* or a space-saving nautilus icon.

It supports several views, each providing handy shortcuts to getting data into your databases. Switch between these views by clicking the icons at the top of the pane. Below we cover the different views the *Sorter* provides for quickly capturing data.

### HOME

The home view provides a convenient list of the databases and groups in DEVONthink.



To add files in the *Sorter*, drag over the docked tab or menu bar item. The *Sorter* will spring open. then drop items into specific groups to quickly import them. Also equipped with a handy search field, you can search for and isolate groups for more targeted importing. This view is composed of three sections:

- **Search Field:** Use the search field to help quickly locate specific groups. This uses substring matching, so you can enter parts of words to find matches. The view updates while you type for efficient searching.
- **Favorites:** Provides a convenient list of the groups you've added to the [Favorites](#) section of the global sidebar. Drag items onto your favorites to import them. Control-clicking a group or database gives you the option to *Reveal* or *Open* the item. You can also double-click an item to open it in a new window.
- **Databases:** Provides a list of open databases and access to their groups. Behaves in the same way items in your *Favorites* do.

**Hotkeys:** The home view supports these hotkeys:

- **Tab:** Switch the cursor focus between the search field and databases list.
- **Command-Option:** Hold these keys when dragging Finder files or folders to [index](#) them.
- **Command:** Hold this key when dropping an item to move it into the database, putting the original in the system trash.
- **Up/Down Arrows:** Navigate up and down through the database listing.
- **Left/Right Arrows:** Open and close groups containing subgroups. Hold the `⌘` Option key while pressing the right or left arrow to fully expand or collapse all the subgroups, respectively.

Note: The `⌘` Escape key can be used in all views to quickly close the *Sorter*.

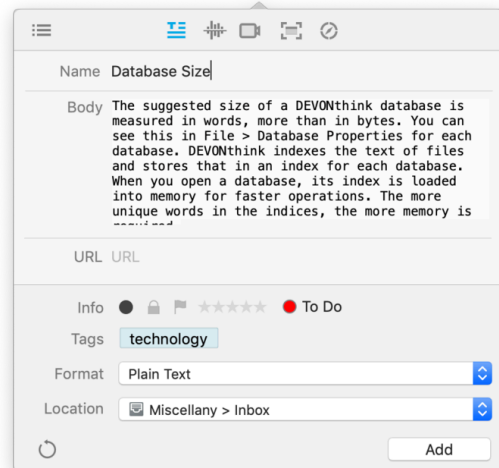
## CREATING FILES

The remaining views are focused on creating files, whether that's a simple plain text file, a screen capture of an application's window, or some recorded video. At the bottom of each of these views you will be presented with these common options for saving and resetting:

- **Add:** Saves the file in the specified format in the chosen location.
- **Reset:** Displayed as a ↶ backward pointing circular arrow, click it to clear the view to its default settings. This option is visible on all views that support creating files.

## TAKE NOTE

The *Take Note* view is for those times when you just need to quickly write a note but don't want to go back into your databases to create a new file.



Allowing you to write notes in several formats, the text will be displayed in the font defined in [Preferences > Editing](#). Make your note taking a little faster by defining a hotkey with the [Preferences > Sorter > Take Note Hotkey](#). This view supports these attributes:

- **Name:** The title of your file. If left as *Automatic* DEVONthink will attempt to create a title from the first sentence of the body.
- **Body:** Enter your note text here.
- **URL:** If there is a URL you'd like to associate with the file, perhaps a link back to a source, enter it here.
- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.
- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Format:** Choose the format of the saved note. Choose from: plain text, rich text, formatted note, and Markdown.
- **Location:** Choose the location to save your file from the dropdown list. The location of

the last saved file will be preserved for the next note you create.

- **Add:** Saves the file in the specified format in the chosen location.

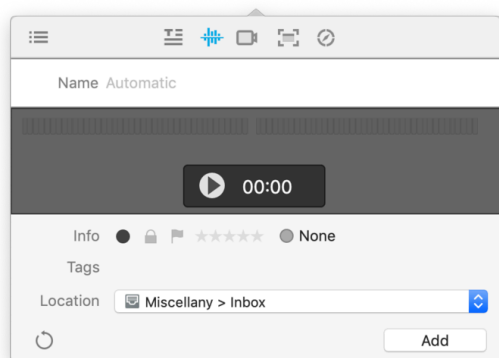
**Hotkeys:** The *Take Note* view supports these hotkeys:

- **Command-S:** Press these to save the item, effectively pressing the *Save* button.
- **Control-Tab/Shift-Control-Tab:** Move the cursor between fields, e.g., between the body and URL. Hold  $\uparrow$ Shift to cycle backwards through the fields.

**Take Note Panel:** The *Take Note* panel is displayed when the *Sorter* is set to *None* in [Preferences > Sorter](#). It has the same functions as the view in the *Sorter* and also will be pinned over any open windows.

## VOICE NOTE

Use this view to record a voice note directly into your database. This creates an [AIFF-C file](#) in the location you choose. With simple controls, it's easy to record impromptu audio.



This view has a few simple sections:

- **Audio Levels and Timer:** At the top is a sound meter to help visualize your audio level as you record. The elapsed time

is shown as it records, convenient for projects like rehearsing a presentation.

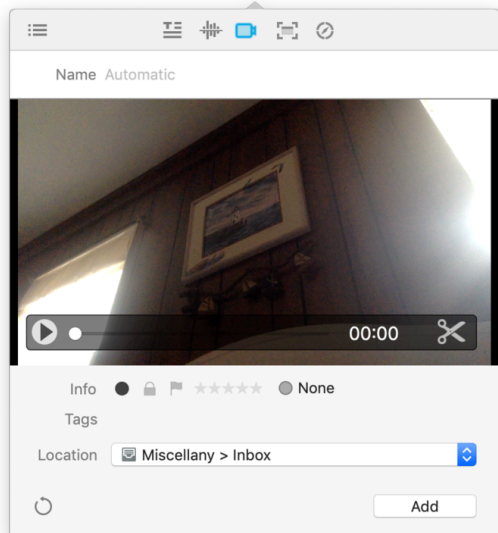
- **Begin/Stop Recording:** Press the red circular button to begin recording. Press the black square button to end recording.

When you've stopped recording, you will be shown:

- **Playback and Volume:** Playback your audio to ensure it's good before you save it. Press the *Reset* button to clear the audio and record again.
- **Name:** Enter a name for the audio file. If no name is provided, a date and timestamped name will be automatically given.
- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.
- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Location:** Choose the location to save your file from the dropdown list.

## VIDEO NOTE

Use this view to capture a video from your Mac's built-in camera. Videos are saved as [MP4 files](#) for convenient compatibility across platforms and devices.



Like the audio note, this is presented in very simple controls:

- **Begin/Stop Recording:** Press the red circular button to begin recording. Press the black square button to end recording.
- **Source:** Choose the video and audio source in the small downward facing caret next to the record button. Any attached compatible audio-visual devices should be available here.

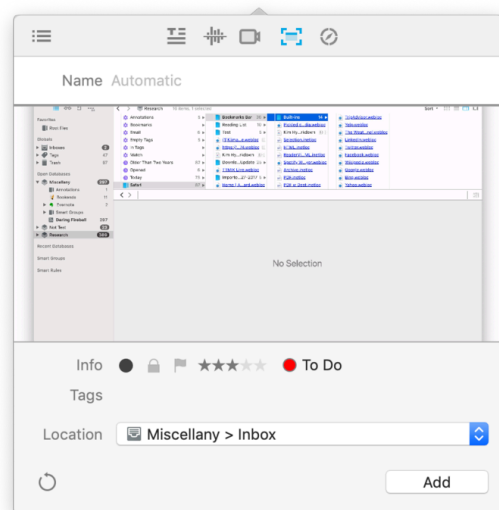
When you've stopped recording, you will be shown:

- **Name:** Enter a name for the video file. If no name is provided, a date and timestamped name will be automatically given.
- **Playback and Volume:** Playback your video before you save it. Or press the *Reset* button to clear the video and record again.
- **Trim:** Shown as scissors, click this to access simple editing tools. You can drag the ends of the yellow frame to change the start and end of the video. Click and drag inside the frame and a red line will appear. This displays the time above the line.

- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.
- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Location:** Choose the location to save your file from the dropdown list.

## SCREEN CAPTURE

Screen captures are a common way to quickly gather information about things on our computers. While the Apple provided mechanisms still work, the *Screen Capture* view allows you to quickly snap a screen shot, add some metadata, e.g., tags or labels, then direct it to a specific location in your databases. The captures will be saved as [JPEG files](#).



This view has one simple section with three options:

- **Screen:** Capture your entire screen.
- **Window:** Capture a specific window by hovering over a window a clicking once. The

window being captured will be highlighted in blue.

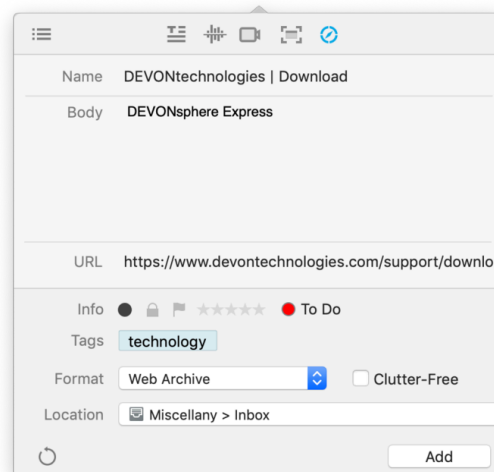
- **Selection:** Capture a specified area by dragging a bounding box around the desired area. To reposition the area, hold the space bar. To stop the capture action, press the **⌘** Escape key.

As with other views, name and information options will appear after the screen is captured.

- **Name:** Enter a name for the screen capture. If no name is provided, a date and timestamped name will be automatically given.
- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.
- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Location:** Choose the location to save your file from the dropdown list.

## WEB CLIP

Use the *Web Clip* view to quickly clip the current web page, a URL from your clipboard, or enter a URL manually.



- **Default Browser:** Displaying the icon of your default browser, click this to capture the current page. This shows the same options as the [Clip to DEVONthink](#) browser extension.
- **Clipboard URL:** If you have copied a URL, click this option to detect and capture it.
- **Manual:** Click this to manually enter a URL to capture.

After clipping, you can add other information to the item:

- **Name:** Enter a name for the screen capture. If no name is provided, a date and timestamped name will be automatically given.
- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.
- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Location:** Choose the location to save your file from the dropdown list.

## PREFERENCES

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

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

## DATABASE PROPERTIES

The *Database Properties* popup displays preferences for a specific database. Select a database and open the properties popup using [File > Database Properties](#)



### GENERAL

**Location:** Shows the location of the database in your filesystem. Note you can double-click any part of the database location to reveal it in the Finder.

**Create Spotlight Index:** Check to make this database available to Spotlight. Checking this option lets DEVONthink create a folder in ~/Library/Cache/Metadata that Spotlight uses for accessing the documents in the database. If you are having issues finding DEVONthink documents in a Spotlight search, you can click the *Rebuild* button to recreate this folder from scratch.

### OPTIONS

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

A database has two names: the *displayed name*, set here in the properties, and the *filename*, the name of the database file in the Finder. When you create a database, the names will be the same. If you change the displayed name, it does not change the filename. This is by design and is used in office or health care environments where clients have a unique number associated with them. A database could have a filename of 10459.dtBase2 but the displayed name of Company A in DEVONthink. If you want to change the filename, close the database and change the name in the Finder.

**Comments:** Add comments about this database. These comments are only used in DEVONthink, i.e., not exported to the Finder.

**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.

**Inherit Tags of Groups:** Applies tags added to a group also to the group's children.

**Case Insensitive Tagging:** Check this option to disallow tags with different capitalization.

**Protection:** To add a layer of protection when syncing your databases, you can add a username and password to the database. Anyone trying to import the database from a sync location will need to provide these credentials. 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.

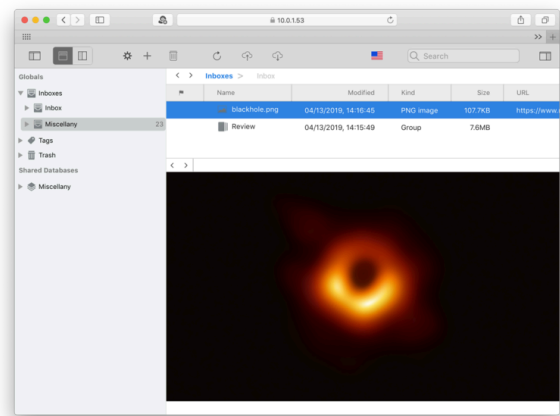
Note: For a locally secured database, create an encrypted database via [File > New Encrypted Database](#).

## STATISTICS

This section displays some basic statistics about the contents of the database, e.g., counts of some different file types, total size of the contents, and number of words in the index of the database.

## WEB SHARING

DEVONthink comes with a built-in server for broadcasting your databases on a network. While the operation is covered in the [In & Out](#) chapter, here we cover the interface shown when accessing shared databases in a browser window. Also note the preferences for setting up shared databases, including setting up users and per-database permissions are covered in the [Preferences > Server](#) section of the Preferences chapter.



The layout of the web sharing should immediately be familiar to users of DEVONthink. While not as full featured as the native application, it behaves in ways similar to DEVONthink's [main window](#). Here we will give you an overview of the parts of this interface.

Note: The permissions given by the administrator of the shared databases determine database visibility as well as what actions you can take. Due to this, some actions, e.g., creating new documents or downloading documents, may not be available. If you do not have permissions to modify the database you're browsing, the cursor will change to show the option is disallowed.

## SIDEBAR

A condensed version of the [Navigate](#) sidebar found in DEVONthink's main windows, this provides access to the contents of any shared databases. Some basic contextual menu items, e.g., *New Group*, *New Feed*, *Rename*, and *Move to Trash*, are available when Control-clicking in the sidebar.



Move files by dragging from the item list over a group in the sidebar to file them in a new location. Holding the ⌘ Command key allows you to copy the file instead of move it.

If you hover over a section in the sidebar, you can hide the *Globals* or *Shared Databases* section. Also, you'll notice this interface has been built in a responsive manner. This causes the sidebar to disappear when the browser window becomes too narrow for it to be effective. You can still use [toolbar](#) buttons to toggle the visibility, as needed.

## ITEM LIST

The item list, like its DEVONthink counterpart (See also [p. 61ff.](#)), shows items in the current location. Items can be selected and reorganized by drag-and-drop, to the sidebar or groups in the same location. Above the item list is the path bar with active links to parent locations. Click on them to quickly jump back to a parent location. To navigate back and forth through locations you've visited, use the < and > buttons in the path bar.

Again, taking its example from DEVONthink's main window, Control-click items in the item list to show these commands in the contextual menu:

- **New:** The submenu allows you to create new items: *plain text*, *formatted note*, *Markdown*, *Bookmark*, *RSS feed*, and *groups*.
- **Get Info:** Shows the [Inspector](#) pane for the selected file.
- **Label:** Apply or remove a color label to a selected file.

- **Mark:** Toggle the *Flagged*, *Unread*, or *Locked* state of a selected file.
- **Rating:** Adjust the rating for a selected file.
- **Upload Document:** Use this to upload a new document to the database.
- **Download Document:** Download the currently selected file(s).
- **Move to Trash:** Move the selected file(s) to the database's Trash.

While you can't reorder the items manually, the item list can be sorted by clicking on the column headers. Click the header again to toggle between an ascending or descending sort. Control-click the headers to enable and disable individual headers.

## VIEW/EDIT PANE

When an item is selected in the item list, a preview of any compatible file will be shown here. Many non-proprietary text-based formats commonly can be displayed. Plain and rich text, Markdown, JPEG or PNG files, PDF, etc. are easily searchable and viewable. There is also support for editing plain and rich text, formatted notes, and Markdown documents directly in this pane. Just click in the preview and begin editing.

**Navigation bar:** The navigation bar above the pane varies what it displays, based on the type of file it's displaying. If an item has a URL, it will be active and displayed here. The bar also allows you to move back and forth through previously viewed files via the < and > buttons.

Of special note are the behavior of formatted notes. They are displayed with a handy toolbar providing some editing options, like adding bold or italic type. You can also select

text and create a hyperlink with it. Lastly, you can choose an image to insert into the document.

For the Markdown fans, you will see the same navigation bar options, showing *Edit*, *Preview*, and *Side-by-Side* modes.

Note: While it is a force of habit — and in general, a good one to be in — you do not need to press ⌘S after editing a file. The changes are saved automatically.

## INSPECTORS

**Info:** A simplified view of the *Info Inspector* pane found in a main window. Shown by clicking the right-most toolbar button or choosing the *Get Info* command from the [Action button](#), this shows basic metadata about the item selected in the item listing. If you have permissions to make changes to the current database, it is possible to change some of the metadata, like ratings or labels.

**See Also:** The second view of the inspector shows the [See Also](#) pane. This gives you some suggestions about other documents that may be related to the currently selected item. Clicking on an item in the results will display that document in the view/edit pane.

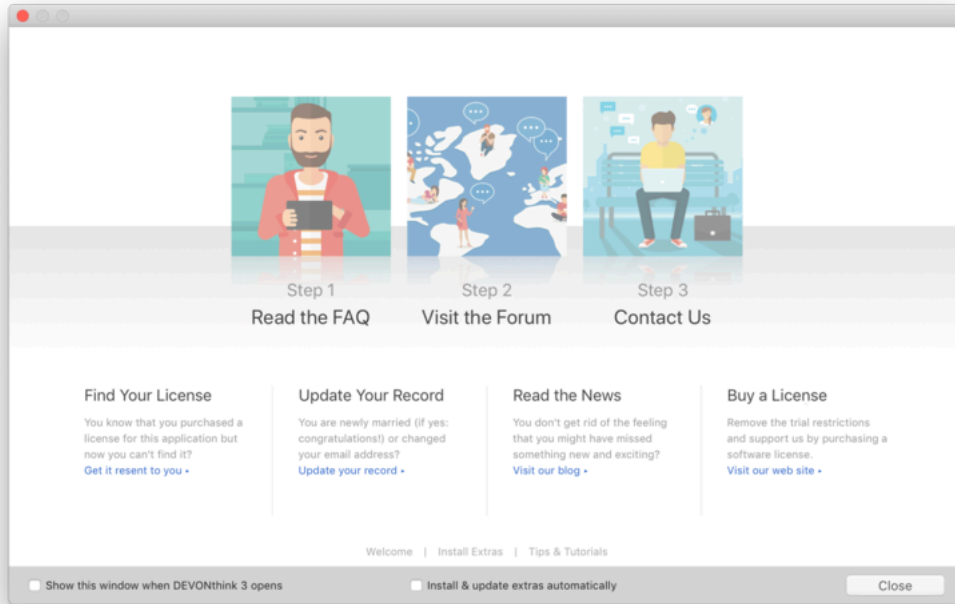
## TOOLBAR

There are a handful of toolbar tools in the web sharing interface. Note a few items will be discussed separately.

- **Show/Hide Sidebar:** Toggles the visibility of the *Globals* sidebar.
- **Preview:** Toggle between standard and widescreen view, with the preview on the bottom or right, respectively.
- **Action:** Displayed with a gear icon, this shows the same options as the contextual menu in the [item list](#).
- **Add:** The submenu allows you to create new items: *plain text*, *formatted note*, *Markdown*, *Bookmark*, *RSS feed*, and *groups*.
- **Move to Trash:** Put the selected item in the database's trash.
- **Refresh:** Manually refreshes the current item list.
- **Download Document:** Downloads the selected items in the item list and downloads them to the downloads location for the browser you're using. For some formats, a ZIP file may be created and downloaded.
- **Language:** Switch the interface language between English, French, and German.
- **Search:** Search for files in the open databases by entering search terms. Search prefixes can be used and are covered in more detail here: [See also p. 64ff](#)
- **Show/Hide Inspectors:** Toggle the [Inspectors panes](#).

## SUPPORT ASSISTANT

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



## WELCOME

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

- 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

Click the links at the bottom of the window to access the other *Support Assistant* sections. You can also check or uncheck the *Show this window when DEVONthink opens* checkbox at the bottom of the window to set whether to show the *Support Assistant* each time DEVONthink is launched.

## FIRST LAUNCH ASSISTANT

The first launch assistant opens automatically the very first time you open DEVONthink, 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. In addition, you can update your details in DEVONtechnologies' customer database, or buy an upgrade or a second license.

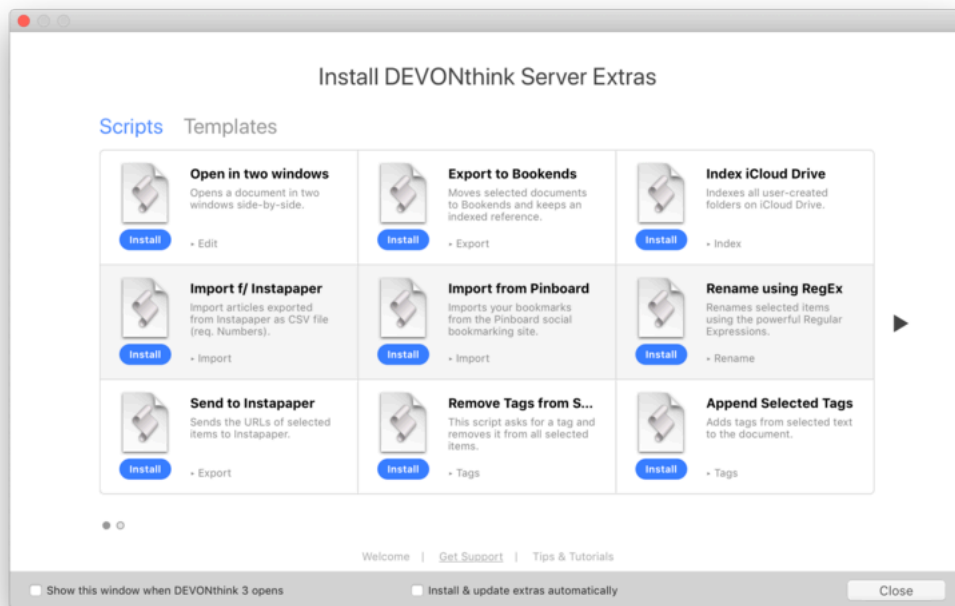
## INSTALL EXTRAS

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

- Scripts
- Templates
- Smart Rules

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. If you check the *Install & update extras automatically* checkbox at the bottom of the window, any updates to scripts or templates you've downloaded here will be updated as needed.

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

## TIPS AND TUTORIALS

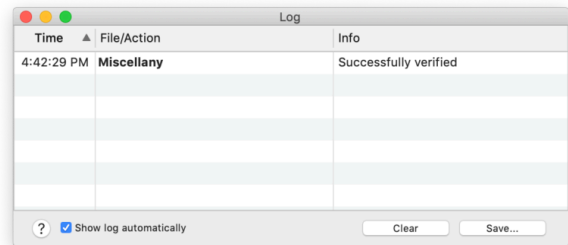
Here you can find the latest tips and tutorials to help you squeeze the best out of DEVONthink. Tutorials can be slideshows describing basic tasks in DEVONthink or screencasts.

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.

## LOG

The *Log* panel displays messages and warnings when importing files and folders and performing other actions. The panel shows the date of the message, any affected files, and a little information about what happened. If you feel you are having sync

issues, this panel is the first place to look. Also, when doing any database or sync location maintenance, this is where the results are shown.



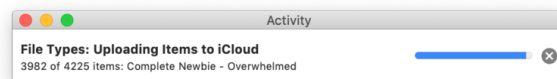
You can save the list to a text file with the *Save* button, and clear the log with the *Clear* button. To sort the log, click a column title to sort on that column, changing from ascending to descending each time you click it. If you Control-click individual log entries you will be shown options to reveal the item in its location or move it to the trash. Alternatively, double-click the entry to reveal the file.

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

[> Log](#). For important notifications, the log is always shown automatically, ignoring this setting.

## ACTIVITY

The *Activity* panel shows a list of currently running background processes, e.g., converting scans to searchable PDFs, refreshing news feeds, downloading PDF documents and web archives via our browser extension, or sync activity. You can manually open this pane via [Window > Activity](#). You can manually stop them to free computer resources or for other reasons.



There is also an *Activity* pane at the bottom of the [Navigate](#) sidebar. Providing a less intrusive experience, this pane will appear and disappear quietly on its own.

**Note:** The *Activity* window is only used if it was opened by the user or if there is no main window to show an *Activity* pane.

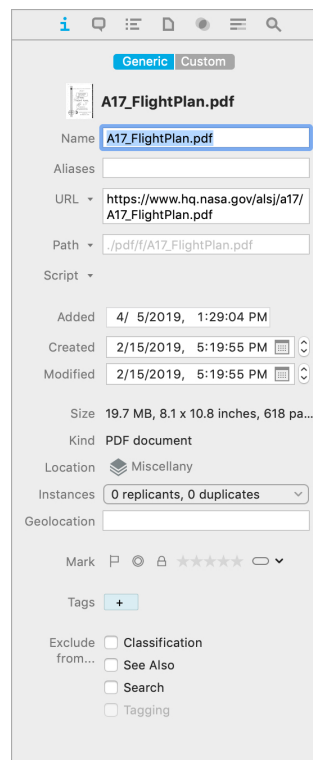
# INSPECTORS

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the Inspector panes displayed on the right side of a main window provide an incredible amount of information and functionality when working with files in DEVONthink. Covering a range of options, from basic metadata to setting reminders to in-document search and replace functions. Each of the Inspectors is individually covered in this chapter.

## INFO PANE



The *Info* pane, 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* pane by selecting [Tools > Inspector > Info > ...](#).

**Note:** When you have multiple items selected, some editable attributes can be modified. For example, tags can be applied to multiple files at once. However, if you add tags to the same files separately, only tags common to them will be shown if you select them together again.

## GENERIC

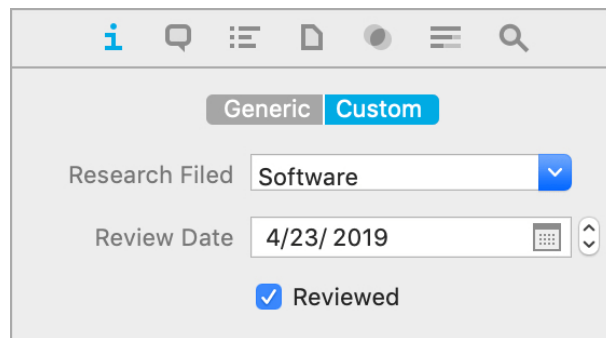
The *Generic* view shows additional basic information about a selected document or group, similar to what is shown in the *Get Info* window in the Finder. Additionally, it shows some other attributes like ratings, color labels, and geolocation data. Here are the attributes shown:

- **Icon and Name:** Displays the name of the selected item. To change the icon of the item, select it and paste any image you want over it. To change the name of the item, use the *Name* field below.
  - **Name:** Displays the name of the selected item. This is an editable attribute.
  - **Aliases:** Displays any aliases for the selected item. Enter one or more words here, separated by semicolons, as alternative targets for Wiki links. Generally, Wiki links refer to the name of contents, and aliases make this system even more flexible.
  - **URL:** Displays a URL associated with the selected item. This is an editable attribute. While it is typically used for web addresses, it also may contain other types; e.g., file URLs, URL with custom schemes, etc. Click the down arrow and choose: *Launch* to open the URL or *Copy* to copy the URL to the clipboard.
  - **Path:** Displays the item's file's path in the Finder. This is not an editable attribute. Click the down arrow and choose: *Launch* to open the file in the system default application; *Show in Finder* to open a Finder window with the file selected, and *Copy* to copy the file path to the clipboard.
  - **Attached Script:** Displays the name of an [AppleScript script](#) attached to the object.
- This is a script that is triggered when you select the item in the database. Click the down arrow and choose: *Select* to choose a triggered script to attach, or *Remove* to remove the script from the item. [See also p. 166ff](#)
- **Added:** Displays the date an item was added to the database. This is not an editable attribute.
  - **Created/Modified:** Displays the date an item was created or modified. These are editable attributes. Click the calendar icon to choose a date and time. You can also select individual parts of the date or time and type or modify them with the up and down arrows. When typing, press the →Tab key to commit the change.
  - **Size:** Displays the size of the item. For groups and news feeds, this field shows the size of all contained items.
  - **Kind:** Displays the kind of the selected item. For documents, the file type will be shown, e.g., Markdown.
  - **Location:** Displays the location of the item in the database. This is an active item; hovering over items will display their full names and clicking them will navigate to the clicked group.
  - **Instances:** Displays how many duplicates or replicants of the selected item are in the database. Click to show a pop-up menu listing all instances and duplicates and their enclosing groups. Select any item to reveal it.
  - **Format:** For news feeds you can set the default format in which new articles are saved.
  - **Color:** Allows you to set a color for a tag. Only available when a tag is selected. Click

the title *Color* for options to clear or copy the color.

- **Geolocation:** Displays geolocation data based on the creation origin of the file; i.e., the geographic location when the file was originally created. This is an editable attribute and can be changed if you'd like the location to be relative to something else, e.g., the site of a historic event.
- **Marks:** Displays these attributes for the selected item: *Flagged*, *Read*, *Locked*, *Rating*, and *Label*.
- **Tags:** Displays the tags applied to the current item. Click the + button to add a new tag. Tags will be suggested from the existing tags in the current database. If the item is selected from the *Inboxes* in the sidebar, suggestions will come from the tags of all open databases. Click an added tag to reveal the Tag group, or remove it from the selected item.
- **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.

## CUSTOM

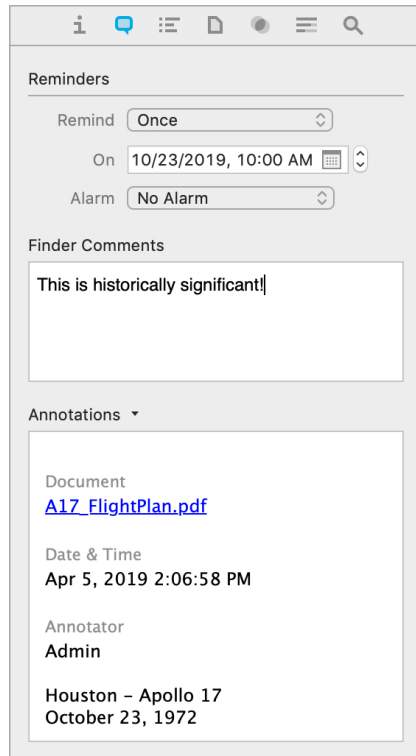


The *Custom* view displays custom metadata fields and their values. These custom fields are defined by you in [Preferences > Data](#). All available fields you have defined are shown in this pane. Note some fields may be specified as data types that include some extra actions in this view. For example, if you create a custom parameter with an *Item Link* data type, you will have an option to reveal the file.

- **Item Link:** Click the down arrow and choose: *Reveal* to reveal the item in the database.
- **Single-line Text:** Type in a value or click the dropdown menu to choose from a list you defined in the preferences .
- **URL:** Click the down arrow and choose: *Launch* to open the URL or *Copy* to copy the URL to the clipboard.



## ANNOTATIONS & REMINDERS



This pane contains *Reminders*, *Finder Comments* and information about *Annotations*. It can be shown [Tools > Inspectors > Annotations & Reminders](#).

### REMINDERS

While there are many reminder applications, including Apple's own Reminders, sometimes you just want to set a quick reminder for an item, or multiple items, in DEVONthink. The *Reminders* section allows you set a reminder, even a recurring one, as well as an optional alarm.

After choosing a schedule, set a date and time for the reminder or to begin a recurring reminder. For recurring alarms, the date or time you set will be the beginning of the alarms. Reminders can be set to:

- **Once:** Only trigger an alarm once.
- **Hourly:** Set an hourly reminder, triggering at the minutes of time you set, e.g., 10:15, 11:15, etc. Set an interval for how many hours should elapse before the next reminder, e.g., 4 for every four hours.
- **Daily:** Set a daily reminder, triggering at the hour and minutes you set, e.g., daily at 9:35 AM. Set an interval for how many days should elapse before the next reminder, e.g., 2 for every other day.
- **Weekly:** Set a weekly reminder, triggering at the hour and minutes you set. Choose a day of the week the reminder should trigger on. Set an interval for how many weeks should elapse before the next reminder, e.g., 3 for every third week.
- **Monthly:** Set a monthly reminder, triggering at the hour and minutes you set, e.g., daily at 9:35 AM. Set an interval for how many months should elapse before the next reminder, e.g., 1 for every month. Choose *Each* and set which days of the month you want a reminder, e.g., the 1st and 15th of the month. Alternately, choose *On the ...* to choose a regular interval like the second Thursday of the month.
- **Yearly:** Set a yearly reminder, triggering at the hour and minutes you set, e.g., daily at 9:35 AM. Set an interval for how many years should elapse before the next reminder, e.g., 1 for every year. Choose which months you want a reminder. Also, choose *On the ...* to choose a regular interval like the last day of those chosen month(s).

**Alarm:** Reminders are most useful when you have an alarm to, well, remind you of something. There are several alarms available for a reminder:

- **No Alarm:** —
- **Bounce Dock Icon:** Bounce the icon in the dock. This will only occur if DEVONthink is not the active application.
- **Display Notification:** Displays a notification using the Notification Center, appearing at the upper right of your screen. The message shown can be a combination of static text and [placeholder text](#). It defaults to the *Name* placeholder. Control-click and choose *Insert Placeholder* to add additional placeholders. Note *System Preferences > Notifications > DEVONthink >* must be enabled for this alarm to display. Notification are also only shown when DEVONthink is not the frontmost application.
- **Display Alert:** Displays an alert dialog when DEVONthink is or becomes the active application. If it's not frontmost, the dock icon will bounce until you switch to it. Like *Display Notification*, this contains static and placeholder text, and defaults to *Name*.
- **Speak Text:** Using the Mac's speech synthesis, this alarm will speak the specified static and placeholder text.
- **Play Sound:** Choose one of the system alert sounds found in *System Preferences > Sound > Sound Effects*.
- **Send Mail:** Enter email addresses to send the matching items to. This can be a comma-delimited list of addresses, names, or enter the name of a group you've defined in your contacts.

- **Add to Reading List:** Add the file to DEVONthink's [Reading List](#).
- **Open Externally:** Open the document in the system default application.
- **Launch URL:** Opens the URL associated with the document, if present.
- **Execute External Script:** Run a selected script. External scripts are stored in `~/Library/Application Scripts/com.devon-technologies.think3/Reminders`. Add your own scripts to this location to make them available for use with reminders.
- **Execute Embedded Script:** Run an ad-hoc script written for the current reminder. Press the ... button to display a popup prepopulated with a core script. Edit this and press the compile button at the lower left. Embedded scripts are only available to the reminder they are created in. If you want to use the same script with other reminders, use an external script instead.

**Note:** When setting a reminder on multiple items, alarms are delivered individually. For example, an alert notification will show for each file, even if they were set for the same time.

If you are interested in the use of scripts in alarms, please refer to the [Reminder Script](#) chapter of the Automation chapter.

## FINDER COMMENTS

Similar to the *Comments* in the *Get Info* pane in the Finder, the *Finder Comments* field can be used to store miscellaneous bits of information about the selected objects.

When an [annotation file](#) is made, the original item link of the document will be stored here as the *Original URL*.

Note: These comments will not appear in the files in the Finder unless the files are indexed or exported from the database.

## ANNOTATIONS

This pane displays or allow you to create annotation files for a selected document. Annotation files are RTF files where you can store notes about a specific document. Commonly used with PDF files, they can actually be used with any document in your database. When you create an annotation file, its URL replaces the URL of the original document. This allows you to jump to the annotation from the navigation bar. The annotation also contains a link back to the original document.

If an annotation file doesn't exist, you can make one with commands from the down arrow in this section. The annotation files will be created in an *Annotations* group in the root of the database.

- **New from Template:** Click the down arrow and choose *New from Template*. This will create an annotation file, using the same template as the one from the *Data* menu, but the file will reside in an *Annotations* group at the root of the database.
- **New from Clipboard:** Click the down arrow and choose this option to create an annotation with content from the clipboard. Note this will not use the same template, but will just contain the clipboard content. This file resides in the *Annotations* group.

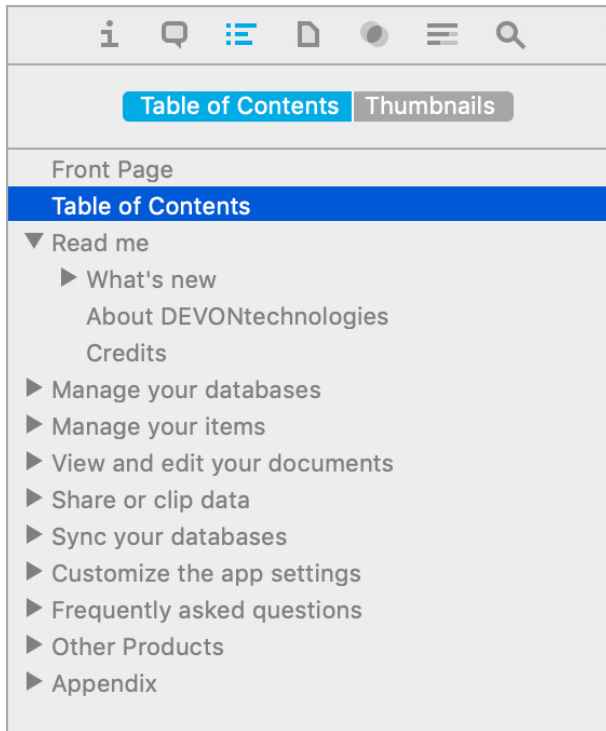
- **Insert Back Link:** This inserts a back link to the current file in the annotation file. If no annotation file exists, one will be created with this command.
- **Insert Quote:** This inserts both the selected text and a back link to the annotation file. If no annotation file exists, one will be created with this command. This is only supported by PDF documents.
- **Remove:** Moves the annotation file to the database's [See also p. 67ff](#) *Trash*.

If an annotation file is detected by DEVONthink or you've just created one, an editable preview of the file will appear here. Clicking the down arrow reveals these options:

- **Open:** Open the annotation file.
- **Reveal:** Reveal the annotation file in its current location.
- **Insert Back Link:** If necessary, use this option to insert a link back to the original document in the annotation.
- **Insert Quote:** Inserts the selected text and a back link to the original document in the annotation. This only works with PDF documents.
- **Remove:** Remove the annotation. This moves the annotation file to the database's trash and removes the reference from the original document.

Note: A smart group named *Annotations* is created at the root of the database. Use this group to quickly find and access any annotations files in the database, regardless of their locations. This allows you to organize the annotations as you wish and still have quick access to them.

# CONTENT



Navigating [PDF documents](#) can sometimes be difficult when you are just scrolling through endless pages of documents. The *Content Inspector* shows two views, similar to what you see in Apple's Preview application: *Table of Contents* and *Thumbnails*.

## TABLE OF CONTENTS

The *Table of Contents* view will display the outline of a PDF document, provided that PDF contains one. Click on the disclosure triangle to show or hide sections within chapters. Click on any section heading to jump directly to the beginning of it.

## THUMBNAILS

The *Thumbnails* view shows a list of thumbnails, one for each page in the document. This allows for a more visual approach to moving through your document.

By default, the thumbnails are shown in a single column but they can be displayed in multiple rows if the sidebar is expanded. This view allows for actions like these:

- Jump to or select any page by clicking on it. Extend a range of selected pages by holding the `⇧` Shift key to select consecutive pages. Hold the `⌘` Control key to select non-consecutive pages.
- To quickly remove unwanted pages, press the `⌫` Backspace key.
- If you want to reorder some pages, select the page(s) to move and drag and drop them within the thumbnails. A blue line will appear at the place the pages will be inserted. This will also work if you drag thumbnails from one PDF to another.
- Drag selected pages to another location in your database and DEVONthink will create a new PDF containing only those pages.

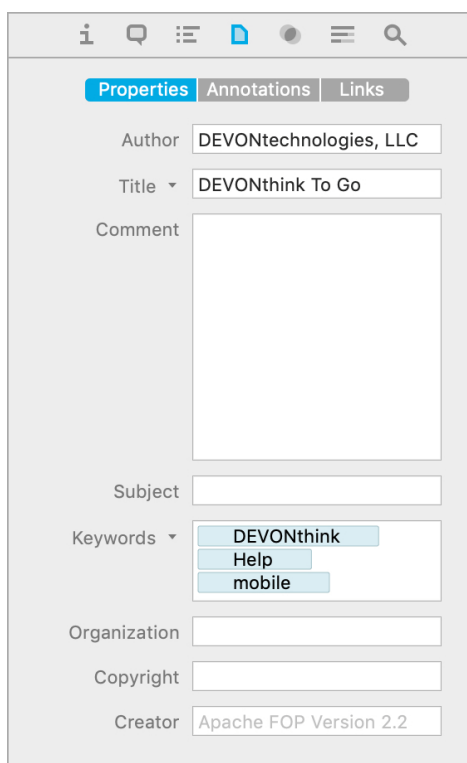
You also have several options available in the contextual menu when you Control-click in the *Thumbnails* view:

- **Cut/Copy:** Cut or copy the selected page(s) to be pasted into another PDF.
- **Copy Page Link:** Copies a URL to the clipboard pointing directly to the current page of the document.
- **Reverse Page Order:** Reverse the page order of the document.
- **Split Document:** Split the document at the selected page. This treats the selected page as the first page of the document. Pages before the selected page will be split into a new document and removed from the original document. This item is unavailable when the first page of the

document is selected. Also, note this cannot be undone.

- **Insert Blank Page:** Insert a new blank page.
- **Delete Selected Page(s):** Delete the selected page(s).
- **Rotate Left/Right:** Rotate the selected pages left or right.
- **Select/Deselect All:** Select or deselect all pages in the document.

## DOCUMENT



The screenshot shows the 'Properties' tab of a document inspector. It contains the following fields and values:

- Author:** DEVONtechnologies, LLC
- Title:** DEVONthink To Go
- Comment:** (Empty text area)
- Subject:** (Empty text field)
- Keywords:** A dropdown menu with three items: DEVONthink, Help, and mobile.
- Organization:** (Empty text field)
- Copyright:** (Empty text field)
- Creator:** Apache FOP Version 2.2

The *Document* inspector provides specific information about the current document. This information is presented in three specialized views: a view of RTF and PDF metadata, a list of annotations in a PDF, and a list of links found in certain document types.

## PROPERTIES

The *Document Properties* section gives you access to all metadata stored for selected RTF and PDF documents. This metadata can include some of the following:

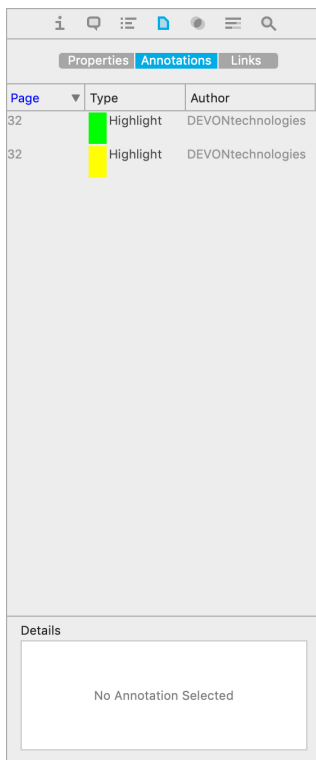
- Author
- Company
- Copyright
- Title
- Subject
- Keywords
- Comments
- Organization

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

There are two parameters supporting extra actions:

- Click the *Title* button and select *Copy*, or select *Set Name As* to quickly change the document's name.
- Click *Keywords* and choose *Convert to Tags* to apply the keywords as DEVONthink tags.

## ANNOTATIONS



As PDF files are often used in DEVONthink, annotating these documents is commonplace. The *Annotations* view displays a listing of the annotations in the current document. Each annotation is listed with the following metadata: page number, type, content or author, and the date the annotation was made. In the case of highlights, text, or note annotations, the content will be displayed. With graphic annotations, e.g., rectangle or ovals, the [author](#) will be displayed. The list can be sorted by clicking the appropriate header. Select an item in the list to switch to the proper page. The annotation on the page will be selected. This makes it easy to navigate via the document's annotations.

At the bottom of the view is a *Details* section. For *Note* annotations, this will show the text of the annotation. Details can be added to other annotation types as well, but only supports plain text entries.

Opening the contextual menu in the *Annotations* list offers the following options:

- **Copy:** Copies the metadata and any text in the Details to the clipboard as plain text.
- **Copy Page Link:** Copies a URL to the clipboard pointing directly to the current page of the document.
- **Delete:** Delete the current annotation.
- **Select/Deselect All:** Quickly select or deselect the items in the list.

## LINKS

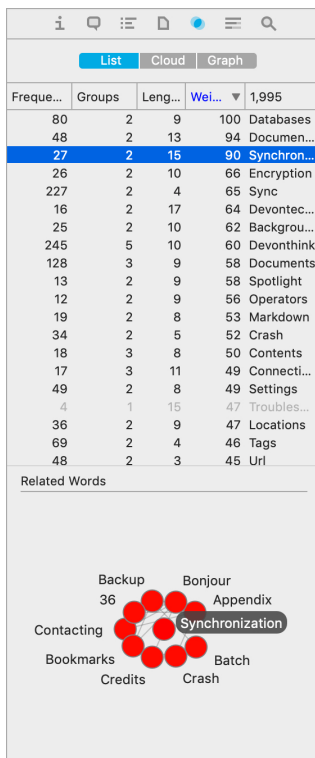
For the selected document, DEVONthink will attempt to determine if it contains URLs. These may be web URLs, file URLs, item links, and even DEVONthink's WikiLinks. (You may be surprised by the number of links in many documents.) The *Links* view provides a list of any found links. Select a link in the list to show it in the document. Double-click the link to open it in a document window or an external application.

Opening the contextual menu in the *Link* list offers the following options:

- **Open:** Opens the link in an external application.
- **Open in Tabs:** Opens the link in a new tab, when possible.
- **Copy:** Copies the URL to the clipboard
- **Delete:** Deletes the link and the text.
- **Select/Deselect All:** Quickly select or deselect the items in the list.

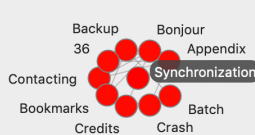
## CONCORDANCE

The *Concordance* pane, opened in the *Tools > Inspectors* menu, gives you a tool for analyzing the contents of a document or database. If one or more documents is selected, the results will be inclusive of the text in all of them. If there is no selection, the results will be based on the text in the entire database. These results are presented in three distinct views: *List*, *Cloud*, and *Graph*.



Freque...	Groups	Leng...	Wei...	1,995
80	2	9	100	Databases
48	2	13	94	Documen...
27	2	15	90	Synchron...
26	2	10	66	Encryption
227	2	4	65	Sync
16	2	17	64	Devontec...
25	2	10	62	Backgrou...
245	5	10	60	Devonthink
128	3	9	58	Documents
13	2	9	58	Spotlight
12	2	9	56	Operators
19	2	8	53	Markdown
34	2	5	52	Crash
18	3	8	50	Contents
17	3	11	49	Connecti...
49	2	8	49	Settings
4	1	15	47	Troubles...
36	2	9	47	Locations
69	2	4	46	Tags
48	2	3	45	Url

Related Words



- Word weight (relevance, depends on the contents of the database)
- Alphabetical listing

Click the column headers to sort on a given parameter. Select a word in the list to highlight all occurrences in the current document. Double-click a word to open a database-wide search for the term.

Opening the contextual menu in the results offers these options:

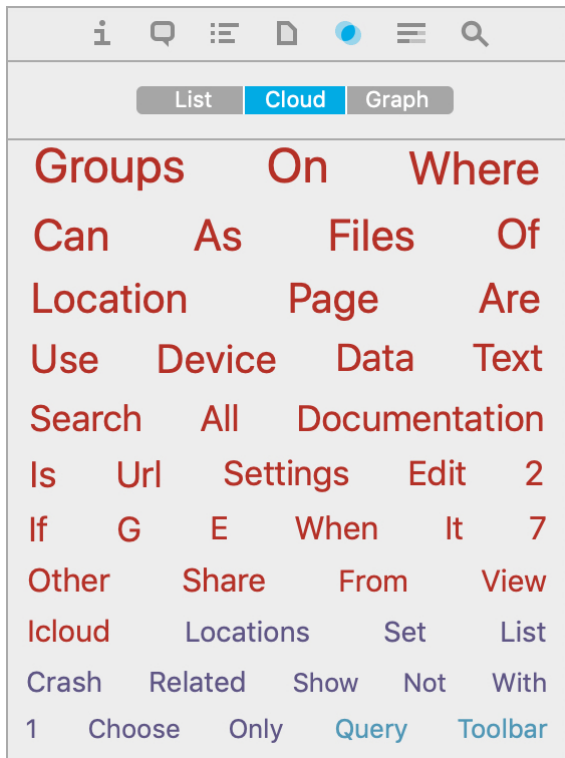
- **Copy:** Copies the values for the selected word to the clipboard.
- **Exclude/Include Word:** Use this to define stop-words or to include them again.
- **Select/Deselect All:** Quickly select or deselect the items in the list.
- **Show/Hide Excluded Words:** Select this to show or hide any excluded terms. Excluded terms will shown with a strikethrough.

## LIST

The *List* view displays the concordance results in a list, separated by these parameters:

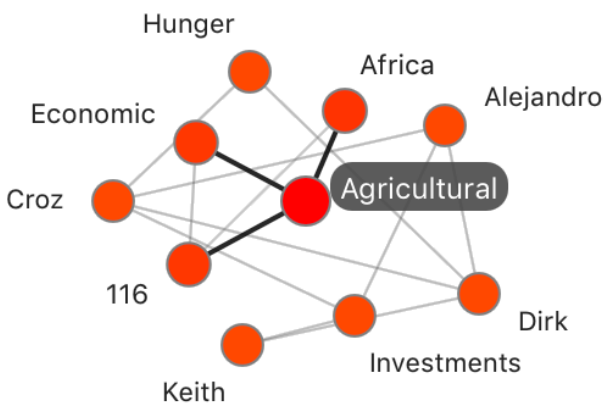
- Word frequency
- Number of groups with items containing a specific word
- Word length

## CLOUD



The *Cloud* view present the concordance as a word cloud. The size of the terms is relative to the frequency in the selection or database. Selecting terms highlights the occurrences in the current document.

## RELATED WORDS



Of special note is the *Related Words* graph shown under the *List* and *Cloud* views. Select a word in the list or cloud and it becomes the central term in a graph of related words. These are words found throughout your

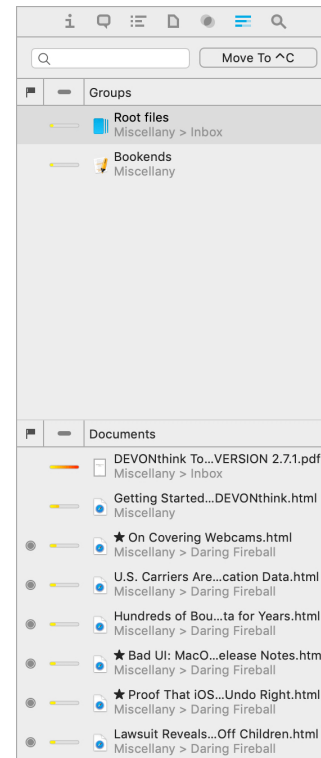
database. Double-clicking a node initiates a database-wide search. The contextual menu provides options for copying the word's information, as well as excluding the word.

## GRAPH

The frequency graph shows a graph of the word frequency over the rank number of the word (see above).

Note: There are no contextual menu options in this view.

## SEE ALSO & CLASSIFY



The *See Also & Classify* inspector is the main interface to DEVONthink's brain, our built-in AI engine. This engine is analyzing the contents and locations of all documents in your database and making connections between them. These connections can be seen in this inspector pane.



This inspector will be shown when a document is selected and you choose [Tools > Inspectors > See Also & Classify](#). When the inspector opens, you will be presented with two sections: *Classify* and *See Also*.

## GROUPS

Based on analyzing the contents of the current document, the AI cross-references the contents and locations of other files in the database. The results are shown in the *Groups* section. This list offers a range of suggested locations, displaying a heat-mapped score of its relevance and the location of the group. The highest ranked suggestion is presented first. Obviously, you can choose any other them. If there's a group you'd like to use, double-clicking the suggested group will file the document for you. You can also click the *Move to* button, press `⌘C`, or drag and drop to file it in any of the suggested groups.

Directly above the classify results is a search field. If there is another group you're thinking of that hasn't been suggested, type part of the group name to filter the list of suggestions. Then file into the location of your choice.

On a related note, in the [Data](#) menu, you will find two menu items: *Move to ... again* and *Classify to...* The first provides you the option to classify the current document in the group into which you classified. If you filed into a particular group via the *Groups* section, this menu item would remember it and offer that group as a place to classify the current document. The second menu item offers

its top ranked suggestion for classifying the current document, if you'd like to just follow the AI's suggestions.

## DOCUMENTS

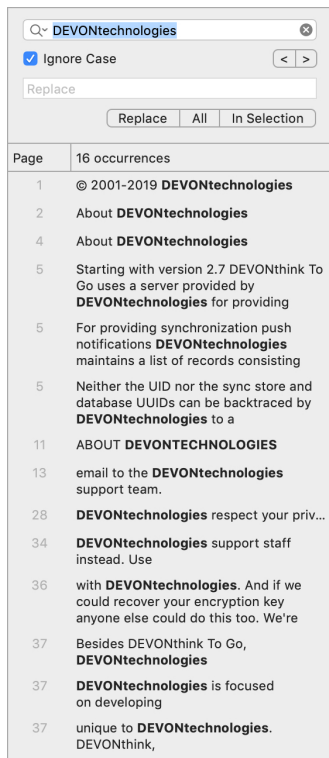
Another benefit of the AI's content analysis is the ability to offer suggestions of documents that may be related to the current document. These files are listed in the *Documents* section of the inspector. Like the [Groups](#) section, this list shows the location of the document and heat mapped score of the potential relevance. Hovering over a result shows a tooltip displaying its full title and location.

Select a document in the results to display it in the view/edit pane. For your convenience, DEVONthink always lists the original document near the top of the list. This way you can select it to go quickly back to the original document. Double-click a document to open it in a document window. Drag a document from the list to move it to another location. When dragging, you can create duplicates by holding the `⌘` Option key. You can also create replicants by holding `⌘` Command and `⌘` Option and dragging to another location in the database.

## CONTEXTUAL MENU

The *See Also* and the *Classify* sections host many of the same contextual menu items as the item list. A list of these commands is included in the [contextual menu](#) section of the appendix.

## SEARCH



The *Search* inspector provides in-document searching. Using the same familiar ⌘F hotkey you use in most macOS application, you can not only search, but replace found words. Additionally, DEVONthink provides a list of the found words to help navigate the results.

As this inspector uses Mac frameworks for searching, you cannot use wildcards or search operators. It also matches substrings by default. This means a search for "some" would also match "something" or "worrisome".

Something you may find useful is the live updating when you select other files. If you search for a word in the current document and leave the *Search* inspector open, DEVONthink will automatically search newly selected files.

## SEARCH AND REPLACE

The *Search and Replace* section offers these simple intuitive controls:

- **Find:** Enter the word(s) you'd like to search for. Note this matches substrings by default, so entering "word" would match "words" and "wording" as well. Use spaces before or after the word to treat it as a full word.
- **Ignore Case:** Check this if you'd like to ignore capitalization when searching.
- **Previous/Next Arrows:** Use these arrows to cycle backward and forward through the highlighted results.
- **Replacement Text:** Enter replacement text, as desired. Note this field is only enabled when you have editable text in the current document; e.g., rich text or a Markdown document in editing mode.
- **Replace:** Replace the currently highlighted word and move to the next search hit in the document.
- **All:** Replace all occurrences of the found word.
- **In Selection:** If you make a selection in the text, you can replace all occurrences of the found word in that selection.

## SEARCH RESULTS

The results provide a convenient list of the found words. This includes the line number of each hit and the number of occurrences found. It also includes part of the surrounding text to help give some context to the found words. Additionally, there are some contextual menu options available when you Control-click in the results:

- **Copy:** Copies the paragraph fragment selected. You can optionally drag and drop this fragment into the database or another compatible document.
- **Copy Paragraph/Page Link:** Copies a link to the current document, but appends a parameter pointing to the selected paragraph for rich text files or the page for PDF documents.
- **Add to Favorites:** Adds the current document to the [Favorites](#).
- **Add to Reading List:** Adds the current document to the [Reading List](#).
- **Select/Deselect All:** Selects all or none of the items, respectively.

# MENUS

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A complete listing of all the commands available in the menu bar of DEVONthink, the *Services* menu, and the contextual menu of the DEVONthink's *Dock* icon.

## THE APPLICATION MENU

The *DEVONthink* menu is a utility menu, similar to those found in other Mac applications. It has commands that allow you check the version via the splash screen or check for application updates. You can install our add-ons, access the [preferences](#), access the *Services* menu, empty your databases' Trash, and quit the application.



## ABOUT & CHECK FOR UPDATES

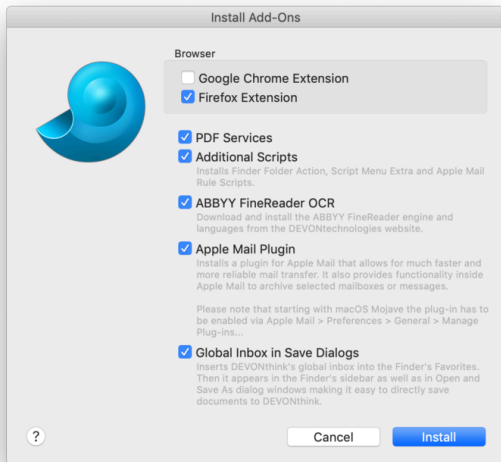
**About DEVONthink:** Shows information about DEVONthink including the version number to whom the software is registered.

**Check for Updates:** Checks if updates for DEVONthink are available. By default, DEVONthink checks for updates automatically, however you can change the update settings in the [Preferences > General](#). If an automatic update is pending choosing this command shows a window with additional information about the update.

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

## ADD-ONS

This command allows you to install, or reinstall, some of our extra support files and scripts.



The following options are available.

- **Google Chrome Extension:** Opens the [Chrome Web/Store](#) page in Google Chrome where you can install the browser extension. You have to do this manually and follow Google's rules.
- **Firefox Extension:** Opens the [Mozilla Add-Ons](#) page in Firefox where you can install the Firefox add-on (similar to the Safari extension). You have to do this manually and follow Mozilla's rules.
- **PDF Services:** Adds *Save PDF to DEVONthink* to the PDF menu of print dialogs. This allows you to print a PDF directly to DEVONthink.
- **Additional Scripts:** Installs the [mail rule scripts](#) for Apple Mail, [Folder Action scripts](#), and [Menu extra scripts](#).
- **Global Inbox in Save Dialogs:** Inserts DEVONthink'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.

- **ABBY FineReader OCR:** Installs the ABBYY Finereader OCR resources for use with images and PDFs with no text layer.
- **Apple Mail Plugin:** A [plugin for Apple Mail](#) that allows you to archive messages or whole mailboxes directly from within Mail. On Mac OS Mojave you'll have to manually activate the plugin after installation. In Apple Mail visit *Preferences > General > Manage Plug-ins* and activate DEVONthink's plugin.

Note: The browser extension for Safari must be installed through the Mac App Store. Also, while extensions for browsers like Opera, Vivaldi, and Brave are not explicitly available, it is possible to install them from the [Chrome Web Store](#), while in those browsers.

## PREFERENCES, TRASH, CACHE

**Preferences:** Opens the application [Preferences](#).

**Empty Trash:** Moves the contents of all open databases' 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.

## PURCHASE & LICENSES

**Purchase:** Opens the [DEVONthink product page](#) from where you can put the app into your shopping cart. If this copy of DEVONthink is already licensed, you will be presented with upgrade choices.

**Enter License:** Enter your purchased licence code here. It is best to use copy-and-paste for transferring the licence code from the email message to the appropriate field.

*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 from DEVONtechnologies or from the Mac App Store.*

## SERVICES

The *Services* submenu gives your access to special commands published by other Mac applications such as TextEdit or Safari, or by services extensions such as our own [WordService](#) or [CalcService](#). Also, DEVONthink publishes its own services. [See also p. 110ff](#)

## THE FILE MENU

The File menu contains commands creating and deleting databases. There are options for adding or exporting files, as well synchronizing them. Additionally, if you need to do database maintenance, you will find those commands here.

## NEW & OPEN

**New Database:** Creates a new database in the selected location.

**New Encrypted Database:** Creates an AES-256 encrypted database file at a user-specified size. Technically this database uses an encrypted disk image but will not be visibly mounted in the Finder. Obviously, when you enable Spotlight for the database the data that Spotlight needs to store will not be encrypted. The anticipated size of the database can be specified in megabytes (*MB*) or gigabytes (*GB*).

**Open Database:** Opens previously created databases. You can select multiple databases.

**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:** Opens a new [main window](#) for the selected database.

## IMPORT & EXPORT

**Import:** The *Import* submenu contains various options for importing data, e.g., selected files, bookmark, contacts, and some data from compatible applications. Some options will import files into their own special groups at the root of the database.

- **Files and Folders:** Imports selected files or folders. Files will be imported to the

current location. Finder tags and Spotlight comments will be imported.

- **Bookmarks:** Imports bookmarks from [DEVONagent Pro](#), [Firefox](#), [Google Chrome](#), or Safari as bookmarks. Bookmarks are imported into a newly created group bearing the name of the chosen browser. Only new bookmarks are imported if you use this command again.
- **Contacts:** Imports Apple Contacts addresses selected in the import dialog into a newly created group named "Addresses". Contacts can be imported as a sheet, as vcards (.vcf), or as bookmarks. Previously created groups are reused. 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 Contacts application.
- **Folders & Attachments from Notes:** Imports your notes from Apple Notes.
- **Items from Yojimbo:** Imports all items from [Yojimbo](#) into a newly created group named "Yojimbo". Imported items retain their name, label, flag, URL, comments, tags and creation/modification dates. Items without a URL link back to the original item in Yojimbo.
- **Notes from Evernote:** Imports selected notebooks from an import dialog into a newly created group named "Evernote". Tags, dates, and URLs should be preserved. Notes are stored as formatted notes. This option requires the Evernote application to be installed.
- **Images (with OCR):** Imports images and applies optical character recognition (OCR) to create a searchable PDF. This makes all written text searchable and available to

DEVONthink's AI functions. You can change the setting in [Preferences > OCR](#). See also [p. 51ff](#)

- **References from Bookends:** Imports selected collections from the presented dialog into a newly created group named "Bookends". Already imported references are updated. The keywords assigned to a Bookends reference are added to the [Document Properties](#) of the created rich text document. Use the optional script [Scripts > Tags > Convert keywords to tags](#) to convert the keywords to tags if needed.
- **Unix Mailbox:** Imports Unix mailboxes, like those exported from [Thunderbird](#). See also [p. 38ff](#)
- **Website:** 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 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.
- **Scan from ScanSnap:** Scans a paper document using an attached Fujitsu ScanSnap scanner.

Note: Groups created when importing bookmarks, contacts, email messages, and items from Evernote or Yojimbo are not automatically excluded from classification and tagging. This makes it easier to classify them later.

**Export:** The *Export* submenu presents options for exporting selected documents or groups to the file system. In addition, the *Export* menu provides export methods based on plugins. DEVONthink comes with a number of standard plugins for exporting documents in different formats. For these formats, the export creates a single merged document when multiple files are selected.

- **Files and Folders:** Exports the selected documents in their native format. Groups are exported as Finder folders, preserving the group structure you have built in DEVONthink. DEVONthink tags are applied as Finder tags to the exported files. Internal metadata for the items is preserved in invisible `.DEVONtech_storage files`, used for reimporting into DEVONthink. If you will not be reimporting the exported files, you can safely delete `.DEVONtech_storage files`.
- **Document:** Exports the currently viewed document in its native format. For images exported from a separately opened document window, DEVONthink lets you choose the desired file format or image quality; e.g., you can export a PNG files as a JPEG file.
- **Text:** Exports the selected items as one large plain text file.
- **RTF Document:** Exports the selected items as one large rich text file without embedded images, etc.
- **RTFD Document:** Exports the selected items as one large rich text file with embedded images, etc.
- **Word Document:** Exports the selected items as one large [Microsoft Word](#) file.

- **PDF Document:** Exports the selected items as a paginated PDF.
- **OPML:** Exports the selected items as one [OPML](#) file.
- **Website:** Exports the selected items as standalone web site that you can upload to your web server and share with colleagues. In the presented dialog window, choose the desired template, text encoding, and whether DEVONthink should convert diacritics and accented characters to HTML entities or not. Check *Create Index Pages* to create `index.html` pages with cross-links to all included documents. Markdown and formatted notes are rendered to HTML, other file types that cannot be displayed in a web browser, e.g., Pages files, are converted to PDF if possible. Cross-links are converted correctly. For the export [templates](#) are used that you can modify yourself.
- **Template:** Saves the selected documents as a template, which can then be used to quickly create new documents using [Data > New from Template](#). Export multiple documents and/or groups at once to create e.g., a project template. *Data & New from Template & Open Template Folder*; can be used to organize templates.
- **Database Archive:** Creates an optimized ZIP file of the current database in the selected location. This can be useful as a secondary backup strategy.
- **Unix Mailbox:** Exports all selected email messages and saves them as Unix mailbox file that can be imported into other email applications. Note this only applies to exporting native email (`.eml`) files, not



files that have been converted to other formats, like plain or rich text.

**Share:** This shows the standard Mac share menu.

## INDEX

**Index:** Use this command to add external files and folders from the Finder. This creates links to the files but leaves them in the current location. Regarding see-also and classification, DEVONthink treats these files the same as imported files. To easily distinguish indexed items, a small Finder icon is displayed to the right their name.

**Update Indexed Items:** Indexed items are updated when you view them. If you need to be sure everything is up-to-date use his command. 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 was not running.

**Note:** Indexed groups are excluded from tagging by default. For more information on importing and indexing, please see the [Import and Index](#) section of the [In & Out](#) chapter.

## SYNCHRONIZE

**Synchronize:** Synchronizes the selected database with all its locations. Note, this command will be disabled if the current database has no active synchronization. Holding the ⌘Shift key shows the *Synchronize All* option to synchronize all actively syncing databases.

**Download Pending Files:** Downloads the files of selected documents if they are available through one of the database's locations. Only necessary if none of the database's locations is set to [synchronize indexed files](#).

## DATABASE PROPERTIES & CLOSE

**Database Properties:** Opens the [Database Properties](#) popup for the current database. This panel presents a few options, statistics about the database, and allows you to change the displayed name, add comments, and add a username and password.

**Close Database:** Closes a selected database. If multiple databases are open, use *Close All* to close them all at once. Note that closed databases will not reopen on launch. Only databases that were open when DEVONthink quits will reopen on the next launch.

## DATABASE MAINTENANCE

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

**Verify & Repair:** Verifies all database structures and repairs them if necessary. Use this whenever you feel it is necessary. By default, DEVONthink automatically

verifies the database structure every time you open a database. If it finds significant errors, DEVONthink will advise you to run this command.

**Optimize Database:** 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 performance. DEVONthink also creates internal backups on a regular basis. Hold the  $\text{⌘}$  Option key to display the *Restore Backup* option. This allows you to roll back the metadata to a previous date. This option would only be used in troubleshooting situations.

**Rebuild Database:** Completely rebuilds the database by exporting all items to a temporary folder in the file system, creating an empty database, and reimporting all items. This removes any structural problems. Depending on the size of your database, this can take from a few seconds to several hours. This option is typically only used in a troubleshooting situation.

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

## PRINT

**Page Setup:** Sets your preferred page size and printer settings.

**Print:** Prints the current document or view.

## 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, CUT/COPY/PASTE, ...

**Undo/Redo:** Use these commands to undo or redo the last action, e.g., to undo deleting a file. *Undo* and *Redo* work for most actions.

**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/Page Link:** Copies a URL to the clipboard that links to the selected document or group. These links can be used to create a back link to the document in applications that support live hyperlinks. For PDFs, hold the  $\text{⇧}$  Shift key to reveal the *Copy Page Link* option.

**Paste and Match Style:** Pastes text from the clipboard, matching the 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 function uses the currently active dictionary, chosen in the language dropdown of the *Spelling and Grammar > Show Spelling and Grammar* panel.

**Select All/Deselect All:** Selects or deselects the complete content of the frontmost document. Hold the  $\text{⇧}$  Shift key to reveal the *Deselect All* option.

## SUMMARIZE, TAGS, SET NAME

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

**Tags:** Use this command to quickly enter tags for the current document. This displays the [Tag bar](#), if necessary.

**Set Name As:** Applies the selected text as the document's name.

## FIND, SPELLING, INSERT

**Find:** This submenu contains standard Mac find commands, like those available in TextEdit. Searches on the current document are displayed in the [Search Inspector](#). Two commands of note are:

- **In Database:** Brings the search field of the frontmost window into focus.
- **Scroll To Selection:** In long documents, this command scrolls the current document to selected text.

**Spelling and Grammar:** Provides the standard macOS 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.

Note: The *Spelling and Grammar* and *Substitutions* commands can be temporarily applied to the current document. If you'd like these to be persistent choices, you can make global changes in [Preferences > Editing](#).

**Transformations:** Use this submenu 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 items, like pictures, checkboxes, bulleted lists, etc. The options available are dependent on the current file type.

## DICTATION & EMOJIS

**Start Dictation:** Starts the Mac's [dictation](#) function.

**Emoji & Symbols:** Shows the standard *Special Characters* panel for inserting characters and emoji 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 DOCUMENTS & TEMPLATES

**New:** This submenu provides access to the built-in items DEVONthink allows you to create.

- **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 tries to use the most logical data when creating a new document.
- **Plain Text:** Creates a new [plain text document](#).
- **Rich Text:** Creates a new [rich text document](#).
- **Formatted Note:** Creates a new [formatted note](#).
- **Markdown Text:** Creates a new [Markdown text document](#).
- **HTML Page:** Creates a new [HTML page](#). You can use the built-in macOS WYSIWYG editor to edit the HTML page or switch to its source code ([from the navigation bar](#)) and edit it directly.
- **Sheet:** Creates a new [sheet](#). Add columns to the new sheet by using the + button or by pressing the ↵ Return key. Name the columns and sort the sheets by dragging them with the mouse. Click *OK* to create the new sheet.

- **Bookmark:** Creates a new bookmark. Type the URL and optionally name it to create a bookmark, just as any browser does. If you don't type in a name, DEVONthink will set one automatically.
- **Feed:** Creates a new [RSS feed](#) document. The feed behaves like a special type of group that contains RSS entries published by the feed's author. Type the URL and optionally enter a name. If you don't type in a name, DEVONthink will attempt to set one automatically. You can change the URL later by selecting the feed document and changing the URL field in the [Info](#) inspector.
- **Twitter Feed:** Creates a new RSS feed from a specified Twitter account. Enter the Twitter handle, e.g., devontech, and an optional name, to get a feed of recent tweets from the account. If no name is entered, DEVONthink will attempt to set one automatically. As with other feeds, you also can change the URL, if for example, the feed isn't working as expected.
- **Group:** Create an empty [group](#). This option appears as *Tag* if you are currently in the *Tags* group of a database.
- **Smart Group:** Creates a new smart group. This is a special group that shows items matching your specified criteria, similar to the Finder's "Saved Search". DEVONthink opens the [Smart Group Editor](#), which lets you define your search criteria. When saved, the contents are updated every time you display the smart group's contents.

**New from Template:** This submenu allows you to access any installed templates and add them to the current group in your database. There are two other commands to note:

- **Open Templates Folder:** Select this to open ~/Library/Application Support/DEVONthink 3/Templates.noindex in the Finder. You can add your own documents to be used as templates here.
- **More Templates:** Opens the [Extras](#) section of the Support Assistant to install any available DEVONthink templates.

Note: For more information on the pre-installed templates, check out the [Templates](#) section of the appendix.

## OPEN, LAUNCH, REVEAL, SEND

**Open:** Opens the selected document or group in a [separate document window](#). This command opens a second [main window](#) for the selected group. If you have selected multiple documents, hold the  $\text{⌘}$  Option key to display the *Open in Tabs* command.

**Open with:** Displays a list of applications compatible with the current file type. Opens the selected documents in the chosen application. If your desired application is not listed in the submenu, choose *Other* to browse for it.

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

**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 with the item selected. Note this only works for documents and indexed groups.

**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, [Airmail 2](#), [Microsoft Outlook](#), and [Postbox](#), as well as some legacy email application. 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.

## SAVE, REVERT, DUPLICATE

**Save/Save All/Revert To Saved:** Saves the frontmost document or all documents to disk. Hold the  $\text{⇧}$  Shift key to show the alternate menu item, *Save All*.

**Revert To Saved:** Restores the frontmost document to the last saved version.

**Duplicate:** Creates a duplicate of the selected items. The name of the new item ends in "copy", and because their contents are identical both items are marked with the [icon for duplicates](#) (or, depending on your [preferences](#), show their name in bold and blue).

## MOVE INDEXED ITEMS IN AND OUT

Note: The following two commands are only for use with [indexed](#) files.

**Move Into Database:** Use this command to move an indexed file into the database. Use this command with caution as it moves the file from its current location into the internals of your database. It does not copy the file.

**Move To External Folder:** Use this command to move a non-indexed item, e.g., imported or created in DEVONthink, out to an indexed folder in the Finder.

## FAVORITES, READING LIST, METADATA

**Add To:** Commands in this submenu add the currently selected documents to your [Favorites](#) or the [Reading List](#).

**Mark:** Allows you to mark the item as flagged/unflagged, locked/unlocked, and read/unread.

**Rating:** Allows you to set a rating, from no stars to five stars.

**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 [Preferences > Colors](#).

**Tags:** This submenu offers special commands for automatically adding some kinds of tags.

- **Convert Keywords to Tags:** Converts keywords, like those present in PDF files, into DEVONthink tags.
- **Convert Properties to Tags:** Converts keywords, like those present in PDF files, into DEVONthink tags.
- **Convert Geolocation to Tags:** Converts geolocation data, if present on the file, into DEVONthink tags.

- **Add Tags to Images:** Adds tags to selected images using Apple's machine learning technologies.
- **Scan Barcodes:** This option will attempt to detect a barcode in a selected image. A successfully detected barcode will be added to the [custom metadata](#) for the document.

## CONVERT, OCR, THUMBNAILS

**Convert:** This submenu contains commands for converting between some file formats, e.g., between rich and plain text. Note the options presented are dependent on the type of the selected document. Also, due to differences in the formats, any formatting in the source document may not be able to be perfectly preserved in the destination document.

**OCR:** This menu contains options for choosing an output format when doing OCR on a selected compatible document (JPEG, PNG, TIFF, PDFs with no text layer). The currently supported output formats are: *Searchable PDF, RTF, Word*, and *Web Archive*.

**Thumbnails:** Use these commands to add, remove, or update a thumbnail for the selected files.

## GROUP & UNGROUP

**Group 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.

**Ungroup Items:** The exact opposite of *Group Items*. Moves all items in the groups one level up and deletes the now-deserted groups.

## SEE ALSO & CLASSIFY

The following commands use DEVONthink's built-in AI to suggest good locations for the selected documents:

**Move (to):** This command allows you to quickly move other selected files to the last destination chosen in the [See Also & Classify](#) inspector.

**Classify:** Using DEVONthink's AI, this command will move selected files to the AI suggested location. This command is disabled if DEVONthink is not sure enough about possible destinations.

## 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, hold the  $\rceil$  Option key and choose *Move All Instances to Trash* to move the selected item and all its replicants to the database's 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 commands.

**Note:** Many commands in this menu only work with rich text, Markdown, or formatted notes. 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, STYLES, ALIGNMENT, RULERS

**Font:** This submenu 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. Of special note are these two submenu commands:

- **Copy Font:** Copies the font formatting of a selected piece of rich text.
- **Paste Font:** After using the previous command, applies the copied font to another selection of rich text.

**Style:** Commands in this submenu 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). One command to take special note of:

- **Styles:** The [Styles](#) command opens the macOS styles editor. With it, you can step through all the styles used in the current document. If there's one you'd like to reuse, 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).

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

**Ruler:** This submenu allows you to display the ruler above the preview of rich text documents. There are also two special commands:

- **Copy Ruler:** Copies the current ruler attributes (tabs stops, indents, etc.) of a selected piece of rich text.
- **Paste Ruler:** After using the previous command, applies the copied ruler attributes to another selection of rich text.

## HIGHLIGHTS

**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* submenu to choose your favorite highlight color.

## LINKS, SPACING, LISTS, TABLES

**Make/Remove Link:** Converts the selected text into an active link, or disables the link. This command can be used to create WikiLinks quickly.

**Add/Edit Link:** Use this command if you want to add a specific link to some text. If the text is already linked, the menu will display *Edit*

*Link*, allowing you to change or remove the URL. The behavior you'll see when clicking linked text depends on the target of the link:

- 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 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](#).

**Spacing:** This command allows you to adjust the line spacing of selected text in rich text documents. 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.

**List:** Creates a bulleted list. Select your prefix, bullet style, and suffix in the dialog sheet and click *OK* to insert a new list. In the list, press  $\leftarrow$  Return to insert new items, and press  $\rightarrow$  Tab and  $\uparrow\rightarrow$  Shift-Tab 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.

## PLAIN & RICH TEXT, HYPHENATION, LAYOUT

**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.

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

**Make Layout Vertical/Horizontal:** Enables orienting and editing the document text vertically or horizontally.

## BARS, COLORS, INVISIBLE CHARACTERS

**Show Formatting Bar:** Displays a toolbar of formatting tools under the toolbar, providing access to styles, font and paragraph attributes, and lists. These tools are only used with RTF files.

**Show Editing Bar:** Displays tools above the current preview pane for some file types. For example, rich text formats display several common tools including increasing/decreasing font size, highlighting, toggling the ruler, and displaying the color picker are shown. For sheets, tools to add/remove/duplicate records, as well as editing columns are shown.

**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.

## THE TOOLS MENU

The *Tools* menu provides tools to get more detailed information about your documents, as well as some specialized commands.

### INFO & FILTERS

**Get Info:** Opens a popup containing more detailed information about the currently selected file or group. It combines frequently used elements of the [Info](#) inspector and contains three panes:

- **Info:** The *Generic* panel shows basic information including name, aliases, URLs, file dates, and kind. The *Custom* pane shows metadata specified in [Preferences > Data](#) that has been applied to the file.
- **Annotations & Reminders:** Shows a summary of reminders set for this document, Finder (Spotlight) comments, and Annotations.
- **Properties:** Shows metadata specific to PDF and rich text files. This includes things like keywords, author, and subject that are sometimes included with these types of files.

**Inspectors:** This submenu provides access to the [inspectors](#) panes.

- **Show/Hide:** Shows or hides the inspector pane.
- **Info:** The *Generic* view shows basic information including name, aliases, URLs, file dates, and kind. The *Custom* view

shows metadata specified in [Preferences > Data](#) that has been applied.

- **Annotations & Reminders:** This inspector shows a summary of reminders set for this file, Finder (Spotlight) comments, and annotations.
- **Content:** When viewing PDF files, this inspector provides a *Thumbnails* and a *Table of Contents* pane. Note that the *Table of Contents* panel is only displayed if the current PDF contains one. DEVONthink does not generate the table on its own.
- **Document:** Useful when viewing PDF and RTF files, this inspector displays *Properties*, *Annotations*, and *Links*.
- **See Also & Classify:** This inspector is the main interface to DEVONthink's brain, our built-in AI engine. This engine is analyzing the contents and locations of all documents in your database and making connections between them. These connections can be seen in this inspector pane.
- **Search:** This pane allows you to search the current document, displaying the found words in context and on what lines they occur. Additionally, you can use the *Replace* field to quickly replace selected or all occurrences of the found words.
- **Concordance:** The Concordance is a specialized view showing data about the words in a document. This can be sorted by frequency, groups, length, or weight. The data can be viewed in a *List*, *Cloud*, or *Graph*. Additionally, selected words are highlighted in the current text and a data

[graph showing related words will appear in the List and Cloud views.](#)

**Filter:** The commands in this submenu filter the list of files in the location you are currently viewing. As you select options in these panes, the list of files will change accordingly. The filters are also covered in the [windows](#) chapter.

- **Info:** Shows a pane with options for filtering on dates, flagged state, unread status, rating, or color label. When using the calendar, you can click *Any Date* to set which date you want to filter on: added, created, modified, opened, or due.
- **Tags:** Shows a tag cloud, with frequency-based sizing, i.e., more frequently used tags will be larger. Clicking on tags removes unrelated tags from the cloud, only showing tags that have been applied with the current tag.
- **Maps:** Shows a small map showing pins from geolocation data will be shown. Clicking on a pin will show you files created in that location. The behavior of this pane is similar to Apple Maps, e.g., pinch to zoom in and out, etc.

*Note: When [Info](#) or [Maps](#) is selected, the options will appear at the bottom of the sidebar. When [Tags](#) is selected, they will also appear there, but will also show in the information bar above the item list if the sidebar is hidden.*

## ANNOTATIONS

**Annotate:** This submenu provides access to the PDF annotation tools: *Oval*, *Rectangle*, *Line*, *Note*, *Text*, and *Link*.

**Mode:** Use the commands in this submenu to switch between three modes of interaction in PDF documents: *Move*, *Text Selection*, and *Annotation Selection*.

## CAPTURE, IMPRINT, EDIT PDFS & SHEETS

**Capture:** This submenu provides options for capturing the current document to a new file in a few different formats: *Bookmark*, *Plain/Rich Text*, *Formatted Note*, *HTML*, *Web Archive*, and *PDF (One Page/Paginated)*. Captures are made to the current group. There is also an option to use the *Clip to DEVONthink* command. This allows you to clip to a chosen location.

Note: The available options in the *Capture* menu are dependent on the type of the current document.

**Imprinter:** Choose an imprint you have defined in [Preferences > Imprinter](#) to apply it to the current image or PDF.

**PDF Document:** This submenu provides options for editing the current PDF document: *Insert Blank Page*, *Delete Selected Page*, and *Reverse Page Order*. See the [Documents](#) chapter for more information on PDF documents.

**Sheets:** This submenu provides access to the following tools for editing a sheet: *New Record*, *Duplicate Records*, *New Column*, *Edit Columns*, and *Delete Columns*. See the [Documents](#) chapter for more information on sheets.

## ROTATE & FLIP

**Rotate Left/Right:** Choose this to rotate images, or individual pages in a PDF document.

**Flip Horizontal/Vertical:** Choose this to flip an image on its horizontal or vertical axis.

## CREATE, SUMMARIZE, MERGE, SPLIT

**Create Metadata Overview:** Creates a sheet with records for each selected file. The columns contain data from the generic and custom metadata of each file.

**Create Table of Contents:** Creates a rich text document with links to the currently selected documents.

**Summarize Highlights:** Creates a document with all highlighted text passages of the currently selected documents. In case of items located in multiple databases the summary is created in the global inbox.

**Merge Items:** Merge the selected documents into one. This creates a new file, preserving the originals.

Note: The resulting file type of a *Merge* operation depends on the types of the selected files. Selecting mixed formats, e.g., a web archive and an image, usually results in an RTFD file being created.

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

## RULES

These commands allow you to set or run smart rule commands

- **Apply Rules:** Apply the selected rule on the items that match the rule's criteria in the current location.
- **Perform Rules:** Run the selected rule at any time or in any location. This is not isolated to the documents in the current location.
- **Batch Process:** Use this command to quickly define and run commands without specifically defining a rule. This can be useful to modify multiple selected files.

## START SERVER, TAKE NOTES

**Start/Stop Server:** Use this command to start and stop the integrated web server. [See also p. 53ff](#)

**Take Note:** Opens the [Sorter](#) to the *Take Note* view. If the *Sorter* is not shown, it opens the *Take Note* window.

## THE VIEW MENU

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

### SIDEBAR & LAYOUTS

**Sidebar:** The *Sidebar* view options allow you to switch between the four different [sidebar views](#) in a main window. You can toggle the sidebar's visibility by selecting the same option again.

- **Navigate:** This is the main sidebar view, giving you easy access to your databases, favorites, and global smart groups. [See also p. 66ff](#)
- **Reading List:** Similar to Safari's Reading List, this sidebar view allows you

to maintain a list of items for later consideration. [See also p. 73ff](#)

- **Extras:** This view gives you access to recent updates in tutorials, scripts, and templates. And if you want to keep up on updates from us, it includes links to promotions and release announcements. [See also p. 78ff](#)
- **Import:** The *Import* sidebar view gives you access to scanning and email archiving. [See also p. 76ff](#)

**View:** Choose one of the following options to switch between different layouts for the [item list in a main window](#). All these views are similar to options you find in Finder windows.

- **Icons:** Displays items as icons.
- **List:** Displays items in a list view with user-specified columns shown.
- **Columns:** Displays the item list as a set of columns.
- **Cover Flow:** Displays large thumbnails in a side-scrolling view.

**Preview:** These options allow you to control the position of the current document's preview, or dismiss it altogether.

- **None:** This creates a list only view.
- **Standard:** This shows a preview under the file listing.
- **Widescreen:** This shows the preview to the left of the file listing.

**Quick Look/Slideshow:** Opens the Quick Look panel for the selected items which can be useful for times when the view/edit pane isn't displayed. Holding the  $\text{⌘}$  Option key allows you to display the selected files in a Quick Look slideshow.

## SHOW TAGS & DETAILS

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

**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 Only Documents:** When checked hides groups and smart groups in *List* and *Icons* views.

## COLUMNS & SORTING

**Columns:** This submenu lists all columns available to be displayed as column headers in the item list.

**Sort:** This submenu lists all the attributes that can be used to sort the current item list. Choose *Unsorted* to manually sort the items. DEVONthink remembers sort settings for every group separately and uses those settings when the group is displayed in its own main window

## FULLSCREEN & ZOOM

**Full Screen:** Displays either the current document in a full screen mode optimized for reading and editing, or the frontmost window in full screen. There are two options available here:

- **Document:** Shows the current document in full screen. Note this is a distraction-free view, not the standard macOS fullscreen view.
- **Window:** Shows the current window in a standard macOS full screen view.

**Zoom:** Depending on the document type, you can zoom or out of the document's preview 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).

## DOCUMENT & PDF OPTIONS

**Document Display:** This submenu contains commands for displaying alternate views of some documents. Note there are alternate commands shown when used with [sheets](#) or [HTML](#) and [Markdown](#) files.

- **Best Alternative/Preview/Table View:** Shows a QuickLook view, or a rendered view for HTML-based and Markdown files, the Table view for sheets.
- **Text Alternative/Source/Form View:** Shows a text-only view of some file types, e.g., Word or email. Also shows the page source of HTML-based and Markdown files or the Form view for sheets.
- **Side-by-Side:** Shows a side-by-side view of the rendered view and source for HTML

and Markdown files. Note this does not apply to Formatted Notes.

**PDF Display:** This submenu 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 small break between the pages. When unchecked, the pages appear as a continuous document.
- **Crop Box, Media Box:** Crops the page to the crop or media box. By default, PDF pages are cropped to the crop box.

## TOOLBAR

**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

For people who prefer to use the keyboard for navigation, the Go menu contains all commands for navigating the hierarchy of your DEVONthink database, all with keyboard shortcuts. Use these commands

to go backwards and forwards through your documents, or to move back to the top level of the group hierarchy.

## GROUPS

**Top Group:** Returns you to the top level of the database (also known as the "root").

**Enclosing Group:** Changes the view to the parent folder of the current group or document.

**Selected Group:** Changes the view to the currently selected group.

**To Group:** Opens a popup where you can search for a group by name. Results are shown as you type. The chosen group from the results will display as the current group.

## DOCUMENTS

**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.

**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.

**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 manually using [Format > Highlight](#).

**Next Unread Item:** Navigates to the next item with an unread status in the current database.

**Go to Page/Time:** Allows you to jump to a specified page (PDF documents) or time (supported video and audio files).

## WORKSPACES

Workspaces allow you to save the state of your open databases, as well as the contents 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.
- **Update:** Updates an existing workspace to the current state of databases and windows.
- **Workspaces:** Choose a workspace from the list of saved workspaces to load it.

## THE WINDOW MENU

Just like most every macOS application, the *Window* menu lists all open windows of the active application and gives you access to commands for managing them.

### WINDOWS & TABS

**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  $\text{⌘}$  Option key to change allow the command to affect all windows.

**New, Close, Select Next/Previous Tab:** Opens a new 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 to the front. Hold the  $\text{⌘}$  Option key to change *Bring All to Front* to *Arrange in Front*.

### ACTIVITY, DOWNLOADS, LOG

**Activity:** Opens the [Activity](#) panel. This panel shows all running processes, e.g., OCR or sync activity, and allows you to manually stop them.

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

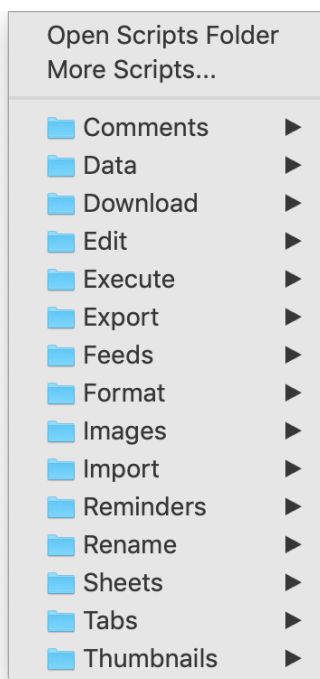
**Log:** Opens the [Log](#) panel. The log lists error messages and warnings that occurred while importing new documents. It also opens automatically when an error occurs. You can save the log to a text file or clear it.

## OPEN WINDOWS

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

## THE SCRIPTS MENU

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



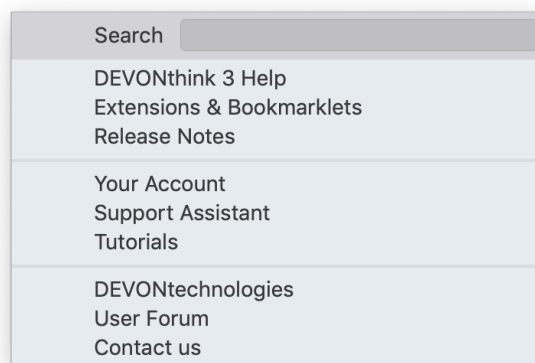
Some of the scripts work without having selected a document, while others require you to select the document you want the

script to interact with. In general, the script will tell you what you have to do when you select it from the ⚡ menu.

Use *More Scripts* to [install additional scripts](#) and read more about scripts and DEVONthink's ⚡ 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

Use these commands to open the integrated help pages, get directions on installing the browser extension and bookmarklets, or access the list of changes to DEVONthink.

## SUPPORT

**Your Account:** Opens the login page for your DEVONtechnologies account where you can get information on your licenses and the devices they're registered to.

**Support Assistant:** Opens the support screen of the [Welcome to DEVONthink](#) assistant with more direct links to the



DEVONtechnologies website, tips, and tutorials. Note this function requires an Internet connection.

**Tutorials:** Opens the *Tips and Tutorials* screen of the [Welcome to DEVONthink](#) assistant. The tutorials help get you started by explaining everyday DEVONthink tasks in step-by-step detail. Note this function requires an Internet connection.

## DEVONTECHNOLOGIES

These commands take you directly to the corresponding pages on our website or send feedback directly us.

**DEVONtechnologies, User Forum:** Quickly access our [home page](#) or our [user forum](#) in your default browser.

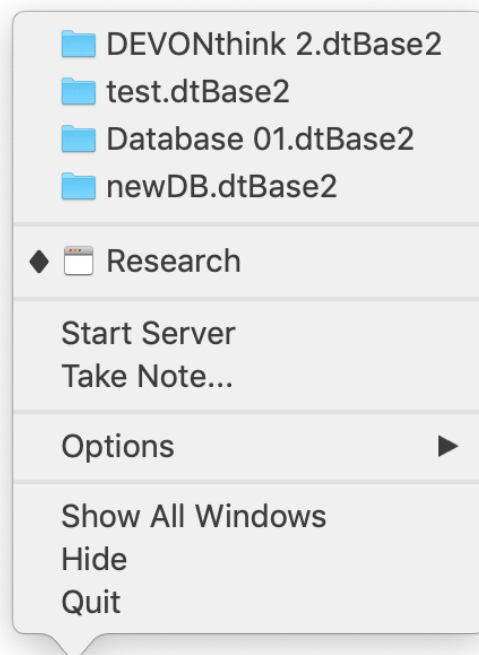
**Contact Us/Report Bug:** Use this to draft a general email to us. When you need to report an issue, hold the  $\text{⌘}$  Option key to show the *Report Bug*. This creates a new message in your default email client or Apple Mail containing the console log and all related crash logs in a ZIP archive, ready to be sent to our customer support.

## THE DOCK MENU

The *Dock menu* appears when you click *DEVONthink's icon* in the *Dock* with the  $\text{⌘}$  Control key pressed, when you right-click it, or when you left-click it and hold the mouse button for one second or longer. When items

are added to a database, a badge appears on this icon. Longer tasks, e.g., importing, indexing, or running scripts, may show a progress indicator on the dock icon.

It also contains the generic macOS commands and an *Options* menu common to all macOS applications. DEVONthink-specific items are listed below:



**Recent Databases:** Quickly reopen a closed database from this list.

**Open Windows:** Switch to any open window from this list. The active window is displayed with a checkmark next to it.

**Take Note:** Opens the [Take Note panel](#).

**Start/Stop Server:** Starts or stops the [web server](#).

# PREFERENCES

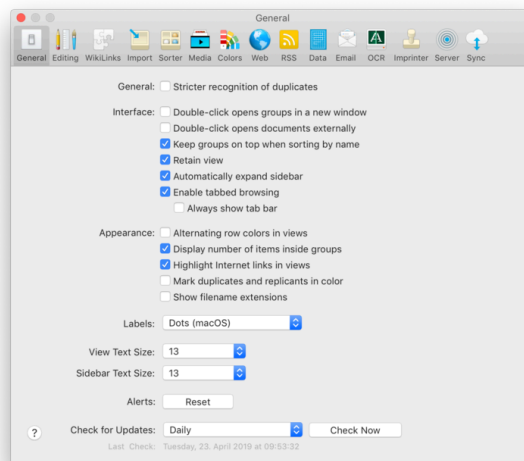
## IN THIS CHAPTER

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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. In addition to global settings, databases also have separate settings in their [Database Properties](#) window that you open using [File > Database Properties](#).

There is also a number of hidden preferences, intended for customer support, but maybe useful for you, too. [See also p. 226ff](#)

## GENERAL



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

## GENERAL

**Stricter recognition of duplicates:** Check to have DEVONthink mark files as duplicates consider the file type and size, as well as the content, when determining duplicate files.

## INTERFACE

These options control the behavior of the interface, e.g., when double-clicking documents.

- **Double-click opens groups in a new window:** This option allows you to open a new window when you double-click a group. If unchecked, the group will be selected

and its contents will be replaced by the file list being currently viewed.

- **Double-click opens documents externally:** Check this if you'd like documents to open in an external application when double-clicked. DEVONthink uses the application set as the default application for the file type in the operating system, e.g., TextEdit for RTF documents. If unchecked, any document that can be edited in DEVONthink will be opened in its own window.
- **Keep groups on top when sorting:** Always display groups at the top of the item list, independent of the sort method, e.g., by Name, by Date Added, etc.
- **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.
- **Automatically expand sidebar:** Check this to automatically show the [sidebar](#) when revealing an item or opening a group in a new window.
- **Enable tabbed browsing:** When checked, click with ⌘ Command 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. Check *Always show tab bar* if you'd like to view the document title in a tab bar when only one document is open.

## 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 documents in groups. In the sidebar, the total number of items in the group is shown. News feeds will show the number of unread items. In the item list, this shows the number of unread and read documents contained in a group. For example, "2/10" shows there are two unread documents out of ten total documents.
- **Highlight Internet links in views:** Check to show bookmarks in the file list and links in documents marked in blue and underlined.
- **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 display a special icon to the right of a document's name.
- **Show filename extensions:** Check this if you prefer to see the file type's extension at the end of filenames.

## LABELS

Choose how you would like labels to be shown in lists.

- **Classic:** Tints the group/document icon (like on Mac OS 9).
- **Modern:** Puts the group/document name in a colored bubble (like on older versions of OS X).
- **Dots:** Shows a colored dot in the list (like on macOS).

## FONTS

Use *View Text Size* and *Sidebar Text Size* to set the font size DEVONthink uses in the sidebar and file list.

## ALERTS

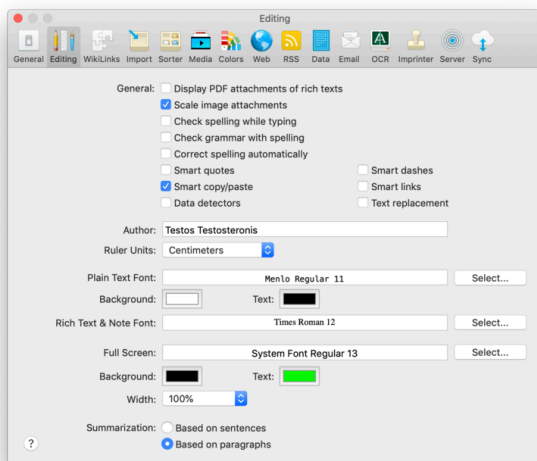
Click *Reset* to make DEVONthink show alerts again that you previously dismissed with "Don't show again" checked.

## CHECK FOR UPDATES

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

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

## EDITING



The Editing tab defines all options that fine tune DEVONthink's text editing behavior, from the ruler units to default font settings to summarization options.

## GENERAL

- **Display PDF attachments of rich texts:** When checked, a PDF inserted into an RTFD documents will display its first page. Unchecked, you will see a link and the PDF's filename.
- **Check spelling while typing:** Spellcheck while you write.
- **Check grammar with spelling:** Check grammar as well as spelling while you write.
- **Correct spelling automatically:** Correct misspelled words automatically.
- **Smart quotes:** Convert straight quotes ("inch marks") to typographer's quotes ("curly quotes") while you type.
- **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.
- **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.
- **Text replacement:** Use the system-wide text replacements when editing text.

## AUTHOR, RULER UNITS AND FONTS

- **Author:** Enter your name. It will be used as default for metadata, e.g., for new rich text documents or PDF annotations.
- **Ruler Units:** Select your personal preference for ruler units: centimeters, inches, points, or picas.
- **Plain Text:** Select your preferred font. This is the font automatically used when you create new documents. Additionally,

specify the background and text colors to suit your taste.

- **Rich Text & Note:** Select your preferred fonts for new rich text formats. This is the font automatically used when you create new rich text documents of formatted notes. It is also the default used for rendered Markdown documents, if no default stylesheet is specified.

**Note:** Hold the `⌘` Option key to restore the default fonts.

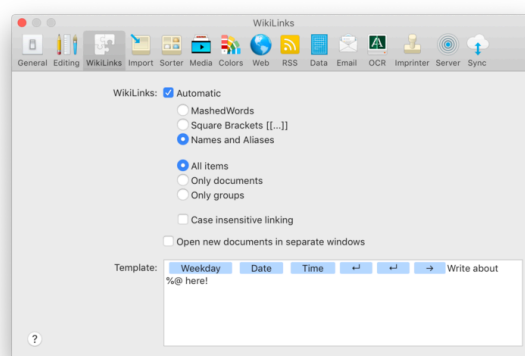
## FULL SCREEN

- **Full Screen:** Select your preferred font for reading and editing plain text files in full screen mode. Rich text documents will display their user-specified fonts.
- **Background:** Choose a background color for the full screen mode.
- **Text:** Choose a text color for the full screen mode.
- **Width:** Choose a width for displaying documents in full screen mode. This setting will apply wider or narrower left and right margins, based on a percentage of the screen width.

## SUMMARIZATION

Select whether you wish DEVONthink to summarize based on sentences or whole paragraphs.

## WIKILINKS



WikiLinks are a way to create interconnected documents in your databases. When enabled, DEVONthink attempts to detect other documents matching the terms you've typed. This creates an active hyperlink to the detected document, allowing you to quickly jump to it by clicking the link. WikiLinked text displays with as underlined text.

## WIKILINKS

To enable WikiLinking, check the *Automatic* checkbox and choose from the options shown here:

- **MashedWords:** Commonly used to avoid creating links from individual words, mashed words are document titles of joined words. If you type a mashed word, it will automatically create a link. If a matching document is detected, it will open when clicking the link. If a matching document isn't detected, DEVONthink will create a new rich text document, prepopulated with information defined in the Template section below.
- **Square Brackets:** WikiLinked text can be defined using square brackets. Type two opening square brackets and the

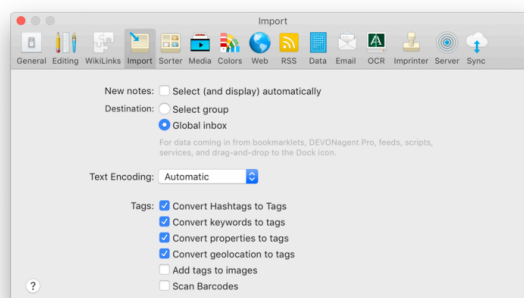
beginning of a document name. Then press `⌘` Option-Escape to show a list of potential item matches in the database. Choose a document and press `↵` Return to complete the link.

- **Names and Aliases:** Matches documents based on their name or any aliases defined in the [Info Inspector](#).
- **All Items/Only Documents/Only Groups:** Choose whether to match only documents, groups, or both.
- **Case-insensitive Linking:** Enable this to ignore capitalization when matching *Names and Aliases*, e.g., `GlobalEconomy` and `globaleconomy` both would match.
- **Open new documents in separate windows:** When clicking a WikiLink, the linked document will open in its own document window.

## TEMPLATE

Text and items entered here will be used to create a new WikiLinked document. You can type any text you want as well as Control-click and use *Insert Placeholder* to insert a token that will be automatically replaced when the template is created. The default title contains several of these tokens already. Check out the [placeholders](#) section of the appendix for information on the available choices.

## IMPORT



Here you can choose options for the location, encoding, and tagging of files coming from external sources, including [bookmarklets](#), [DEVONagent Pro](#), items dropped on the dock icon, [\(external\) scripts](#), or [services](#).

## NEW NOTES

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

## DESTINATION

Choose the [default destination](#) where incoming data 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. Use it to select the group where you want to file the items.
- **Global inbox:** The data is stored in the global inbox.

## TEXT ENCODING

Choose the default encoding used for plain text documents. Select *Automatic* to let DEVONthink choose the best encoding.

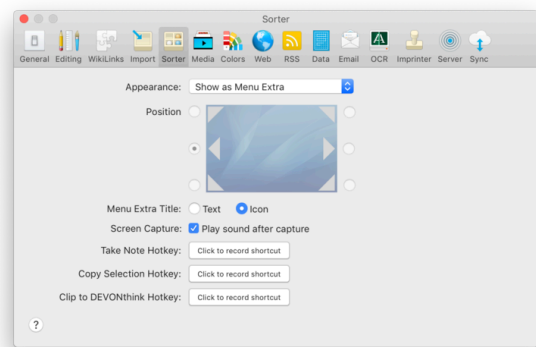
## TAGS

Imported files can have metadata that may be useful as tags. Choose options to convert specific types of information to DEVONthink tags.

- **Convert keywords to tags:** Check this to convert embedded keywords from PDFs and RTF(D) files to tags.
- **Convert properties to tags:** Check this to convert embedded properties from PDF and RTF(D) files to tags.
- **Convert geolocation to tags:** Check this to convert proper names of geolocation data to tags, e.g., "Orlando", "FL", and "United States".
- **Convert Hashtags to tags:** Check this to convert found hashtags to tags.
- **Add tags to images:** Check this to automatically apply tags to imported images.
- **Scan Barcodes:** Check this to allow DEVONthink to try and detect a barcode in an imported image. The detected barcode will be added as custom metadata

These options are honored by email archiving, scanning and OCR, importing from Bookends, Evernote, Apple Notes, and Yojimbo, as well as documents created via the *Sorter* and the web interface (Server edition only).

## SORTER



The *Sorter* preference allows you to choose the window's appearance and location, and assign a hotkeys for capturing data or taking a new note. [See also p. 37ff](#)

### APPEARANCE, LOCATION,...

- **Appearance:** Choose to display the *Sorter* as a menu extra, a docked tab on the side of your screen, or not at all.
- **Position:** Choose the onscreen position of the docked tab. These options will be disabled if *Show as Dock Tab* isn't selected.
- **Menu Extra Title:** Choose whether to show the menu extra as text, or a space-conserving icon.
- **Screen Capture:** Check this to play the system default screen capture sound.

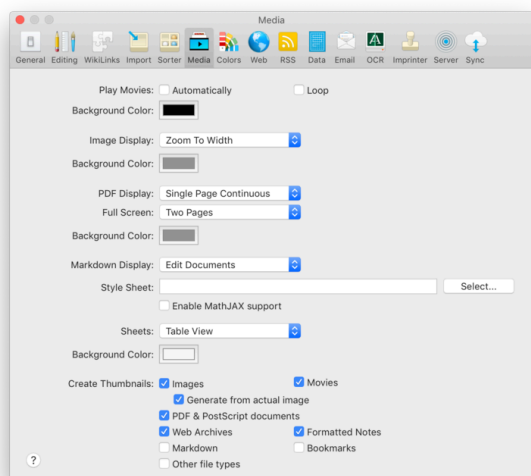
### HOTKEYS

Here you can set system-wide hotkeys for: *Take Note*, *Copy Selection*, and *Clip to DEVONthink*.

To change the hotkeys, 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.

Note: On macOS Mojave, you will be asked to grant Accessibility permissions for *Copy Selection*, and Automation permissions for *Clip to DEVONthink*.

## MEDIA



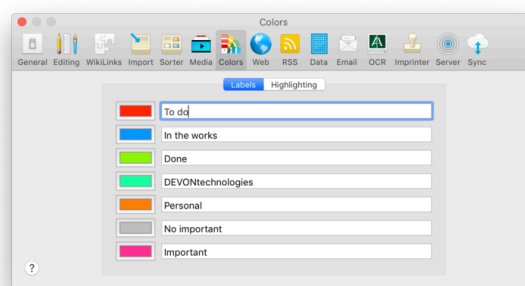
In the media preferences, you tell DEVONthink how to display multimedia files, images, PDFs and other documents. You can also set options to generate thumbnails for certain filetypes.

- **Media:** Check *Play automatically* to play [audio and video files](#) automatically when you display them. Check *Loop* if you want to play the clips in a loop. You can also choose a background color for viewing movies. Check *Automatically resize* to toggle the automatic resizing when viewing PDFs.
- **Images:** Choose a default zoom factor and a background color for viewing images.
- **PDF Display:** Choose the default display mode for windowed and full screen modes and set the background color for viewing PDFs. Check *Automatically resize* to

automatically resize PDFs in the view/edit pane.

- **Markdown:** Choose whether you want to open Markdown documents by default in editing or preview mode. If you want to choose a stylesheet used to display your Markdown documents, click the *Select* button to access stylesheets stored in `~/Library/Application Support/DEVONthink3/StyleSheets`. Check *Enable MathJax support*, if you need mathematical formulae to be rendered in your Markdown documents. (See the [MathJax](#) site for more information.)
- **Sheets:** Select whether to display sheets in *Table View* or *Form View* and set the background color when viewing the table.
- **Create Thumbnails:** Check all document types for which you want DEVONthink to create thumbnails. For images, check *Generate from actual image* to ignore thumbnails embedded into the image files and let DEVONthink generate the thumbnails from the actual image.

## COLORS



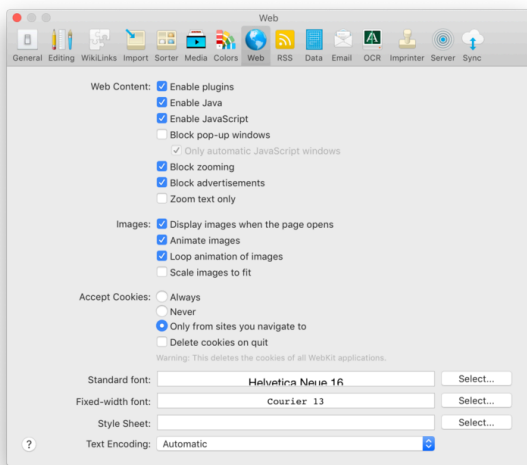
**Label:** Set the name of color for color labels applied to files and groups in your database.



**Highlight:** Set the name and color to be used for highlighting text in compatible file formats, like PDFs.

Note: These are global settings, i.e., you can't have per database label or highlight colors. Also, following Apple's example, we only allow setting seven colors in each category.

## WEB



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

### WEB CONTENT

These settings define how DEVONthink treats special web contents:

- **Enable ...:** Check these options to use installed third-party plugins, (such as Flash or RealPlayer plugins), 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 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.
- **Scale images to fit:** Check this option to scale (large) images to fit.

### 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.

## FONTS

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

**Note:** Hold the `⌘` Option key to restore the default fonts.

## STYLE SHEET

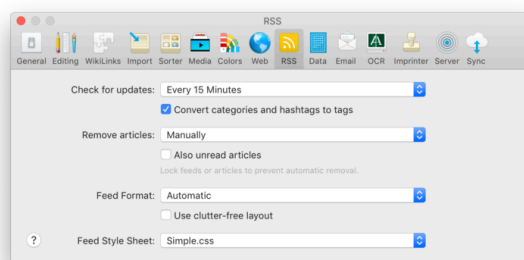
You can further control the way DEVONthink displays web pages by applying a CSS style sheet that changes the rendering on the fly.

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

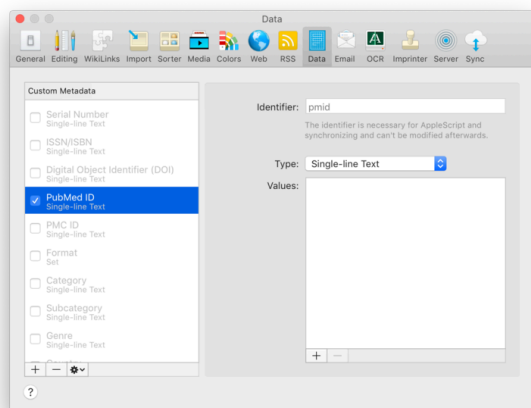


DEVONthink comes with built-in RSS capabilities that enable you to add RSS feeds to your database and have DEVONthink update them automatically. Use these preferences to define how often DEVONthink checks for new articles, whether to skip duplicates when updating feeds, when to remove older articles, and which CSS style sheet to use for displaying the articles.

- **Check for updates:** Set how often you want DEVONthink to refresh your feeds.
- **Convert categories to tags:** Some RSS articles have tag metadata to help people more easily navigate the publisher's site. Check this option to convert these to DEVONthink tags. Note this can add a great number of tags to your database.
- **Remove articles:** Set how often older articles are removed from the feed. Check *Also unread articles* to remove them, even if they're unread.
- **Feed Format:** Choose a file format for the downloaded articles. (RSS articles are presented as HTML files, by default.) Check *Use clutter-free layout* to try to remove unwanted ads, etc. from the article.
- **Feed Style Sheet:** For HTML (*Feed Format: Automatic*) articles, DEVONthink comes with multiple styles for displaying them. You can use your own RSS stylesheets by

placing them into ~/Library/Application Support/DEVONthink 3/StyleSheets.

## DATA



Here you can define [custom metadata fields](#) that can be assigned to your documents.

### CUSTOM METADATA

The *Custom Metadata* column contains a range of built-in fields, ready to use or modify, as needed. These cover a variety of common uses and a list of the pre-defined fields can be found in the [Data](#) section of the appendix.

Enable any field by checking the checkbox next to it. Use the buttons below the *Custom Metadata* column for extra options:

- **Add:** Click the + to create and name a new custom field.
- **Remove:** Click the - to remove any field.
- **Action:** Select any field and click ⌘- for more options, including duplicating and renaming the selected field.

The order of the fields is also the order in which they appear in the [Info](#) inspector.

Note: These options are also available from the contextual menu.

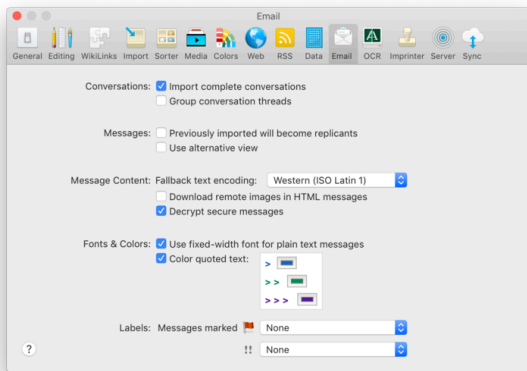
### PROPERTIES

Use these controls to modify the properties of the selected field.

- **Identifier:** This is a special name used in automating with AppleScript. The term is derived from the field's name, and cannot be entered or modified manually.
- **Type:** This is the specific type of the current field. Choose one of twelve data types, such as *Date*, *Boolean*, *Decimal Number*, or *Languages*.
- **Format:** Only displayed with certain data types, you can choose some pre-defined formats, like *Percent*. With the *Currency* option, you will have an option to enter a currency symbol.
- **Values:** Only displayed with the *Single-line Text* and *Set* types, define a list of items to choose from. These choices will be displayed in a dropdown menu when in use. Add and remove the items with the + and - buttons. Control-click an item to change it.

Note: Please refer to the [Data](#) section for more detailed information on the data types.

# EMAIL



Use these options to define how email is imported and displayed inside DEVONthink.

## CONVERSATIONS

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

Note: These features only work if the email program maintains references to previous messages sent.

## MESSAGES

- **Previously imported will become replicants:** Check this option to import previously imported messages again as replicants. When this option is unchecked,

DEVONthink skips previously imported messages.

- **Use alternative view:** Check this option to view email messages [as text alternative](#) by default.

## MESSAGE CONTENT

- **Fallback text encoding:** When decoding an email message, DEVONthink uses the message's encoding information. When there is no encoding information, DEVONthink uses the encoding that you set in this pop-up menu.
- **Download remote images in HTML messages:** Check to store the image references required by HTML messages in the database. Spammers and other unfriendly agencies may use these images to track if you have read the message. Therefore this is unchecked by default.
- **Decrypt secure messages:** Check this to decrypt and file secure email messages. This allows DEVONthink to search or apply AI-based functions such as [Classify](#) or [See Also](#) to them.

Note: The email message will be stored decrypted in the database package. Its contents are available from within DEVONthink and to other applications or Spotlight.

## FONT, QUOTED TEXT, LABELS

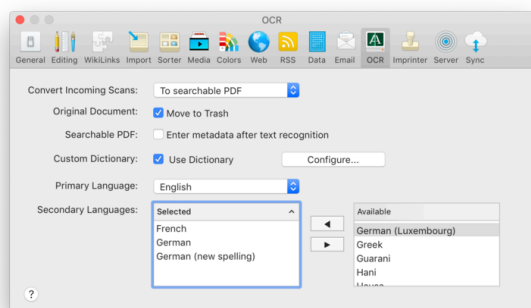
- **Use fixed-width font for plain text messages:** Check to show plain text messages using a fixed-width font such as Courier. This is useful if the messages

contain tables or footers formatted with spaces.

- **Color quoted text:** Check to mark text quoted from previous recipients in messages. Click the color buttons to change the color for first, second, and third level quotes.
- **Labels:** Select which [labels](#) you want to assign to messages that were flagged or marked as "high priority". Since items can only have one label at a time, flagged messages are treated as more important than messages marked as "high priority".

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

## OCR



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

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

### CONVERT INCOMING SCANS

Check *Convert to searchable PDF* to apply OCR to file that have been sent to DEVONthink from a known scanning software, e.g., ScanSnap Home. Choose the desired format of the resulting file: *searchable PDF, RTF document, Word document, or WebArchive*.

### ORIGINAL DOCUMENT

Check *Move to Trash* if you want DEVONthink to move the original documents to the trash after they have been successfully imported using OCR. If files are [converted by OCR](#) within the database, the original document is deleted from the database. If files are converted at import, the original document is moved to the Finder's trash. Using this option is a great way to prevent your incoming group/folder or database from growing cluttered after OCR is done.

Note: This option cannot delete files received from the ScanSnap software.

### SEARCHABLE PDF

Check *Enter metadata after text recognition* to metadata entry dialog whenever a PDF is imported using OCR. Use this dialog window to enter the preferred document name, the author of the document, and any keywords describing the document. You can also adjust the timestamp of the PDF to the actual date of the paper document. The dialog window is shown when OCR processing has been completed.

When checked, the metadata entry dialog will appear whenever you scan a document or import an image file with OCR. You may want to switch this option off when you are scanning/importing multiple files in a batch.

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

## DICTIONARY AND LANGUAGES

**Custom Dictionary:** Check *Use Dictionary* to use a custom dictionary of acceptable words. For example, you may have an unusual spelling of someone's name in some documents. You can enter the name as an acceptable choice for the OCR engine to choose from.

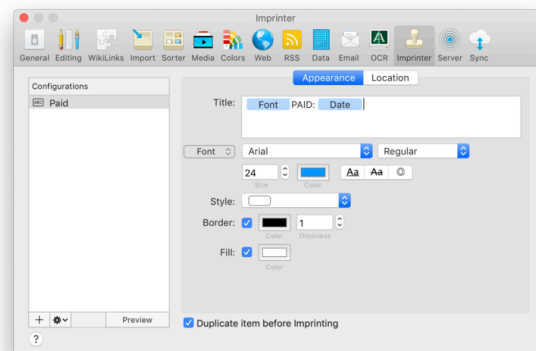
Click the *Configure* button to add custom entries for OCR detection. Note you can only have one dictionary, specified for the language chosen in the *Language* dropdown.

**Languages:** The Languages section of the OCR preferences lets you identify the languages of the documents you scan in. DEVONthink's OCR engines uses this information to improve the accuracy of the text recognition. DEVONthink comes with more than 150 different language dictionaries.

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

Note: The primary language and the secondary languages are treated equally.

## IMPRINTER



Imprints are custom bits of data that can be stamped onto images or the pages of PDF documents. Imprints can be used in a variety of ways, from stamping when an invoice was paid to adding specialized numbering. With the ability to include [placeholders](#), you can create many kinds of watermarks for your documents.

## CONFIGURATIONS

This column lists any custom imprints you've already created. Click an existing configuration to change its appearance or location on future documents, or click and release to change the name. Use the buttons below the *Configurations* column for extra options:

- **Add:** Click the + to create and name a new custom field.
- **Action:** Select any field and click \*v for more options, including duplicating, renaming, and deleting the selected configuration. A special item in the menu, *New Combined Configuration* is discussed below.
- **Preview:** Click this button to see an example of the imprint, as specified by the current settings.

**New Combined Configuration:** Found in the \*v action menu, this option allows you to create new imprints from your existing ones. This extends the usefulness of existing imprints.

From the action menu, select the *New Combined Configuration* option. Two panes will be displayed: *Combined* and a second *Configurations* pane. In the righthand pane, select an existing configuration and click the < button to add it to the *Combined* pane in the center. To remove an item from the *Combined* pane, select it and press the > button. It will reappear in the *Configurations* pane on the right. Combined items will be displayed in the order you add them. To see what the imprint looks like, press the *Preview* button.

Note: DEVONthink remembers the location and styling of the individual imprints in a combined configuration.

## GENERAL OPTIONS

Check *Duplicate item before imprinting* to duplicate the document before imprinting it.

## APPEARANCE

Use these controls to define the parts of the watermark, its font attributes, and the style of a containing box, if desired.

- **Title:** This is the body of the imprint. Type any static text you want to appear in the imprint. *Right-click > Insert Placeholder* to define sections of the watermark with placeholders. Any of these items can be reordered easily by dragging and dropping.
- **Font:** In the *Font* options, choose the font, weight, color, and other styling for the watermark. If you choose the outline style, you can choose the *Thickness* of the outline.
- **Border Style:** Choose and style a pre-defined border, if desired. When using a border, you can also specify the border *Color* and *Thickness* and an optional *Fill* color.

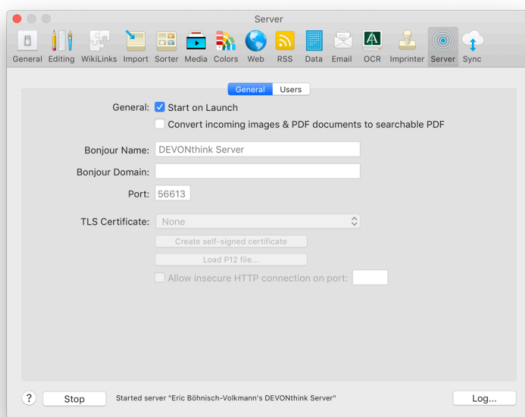
Note: There is only one font style for the watermark. You cannot have mixed styles, e.g., displaying one word larger or in a different color.

## LOCATION

In the *Location* tab, choose and fine-tune the position of the watermark, as well as on what pages it will appear.

- **Position:** Choose a general position for the imprint to appear on the document.
- **Offset X/Y:** Fine-tune the position of the watermark. Negative values are to the left (X) and down (Y). Positive values are to the right (X) and up (Y).
- **Rotate:** Set your imprint on an angle, if desired.
- **Occurrence:** Choose what pages the imprint should appear on. Use *Custom* to have the imprint appear on specific pages.

## SERVER



DEVONthink features a built-in web server that allows you to share documents on your local area network, and optionally, [over the internet](#). As soon as the web server starts, other users can use a standard web browser to search your database, view documents, and download them.

Note: In order to operate properly, DEVONthink needs to be running and will only serve open databases.

Enter all necessary details in the *General* tab and define users and permissions in the *Users* tab. Then click the *Start* button to start the web server available to users whom you have allowed access.

As soon as the server starts, DEVONthink shows the name and two URLs for your database at the bottom of the window. Use either the Bonjour services list of the Bookmarks view in Safari or enter the listed URLs into the address field of your web browser to access your database. Use the numeric address if the Bonjour does not work for your network.

To learn more about using web sharing and how best to make your database available from the "outside" internet, please [read on here](#).

## GENERAL

- **Start on Launch:** To automatically start DEVONthink's web server as soon as you launch DEVONthink, check this checkbox.
- **Convert images & PDF documents to searchable PDF:** Check this to automatically convert all images and non-OCR'd PDF documents added from web sharing users to searchable PDFs.



## BONJOUR SETTINGS

Use these settings to define your DEVONthink server's identity, everything from the name and port, to creating a certificate vouching for the "safety" of the server's activity.

Identity:

- **Bonjour Name:** Enter a distinct name for your computer here that identifies it on the local network using Bonjour. This name will be shown in the list of Bonjour services on other Macs on your network. Switch to the Bookmarks view in Safari or your preferred browser and select *Bonjour* in the sidebar.
- **Bonjour Domain:** Set the Bonjour domain if necessary. Leave this field empty unless you know what you're doing.
- **Port:** If left empty, DEVONthink will assign a random, unused port when the server launches. If the server will be accessed regularly, or from outside your network, setting a static port is suggested. As non-standard ports can be prohibited on some networks, consult with your IT department.

Security:

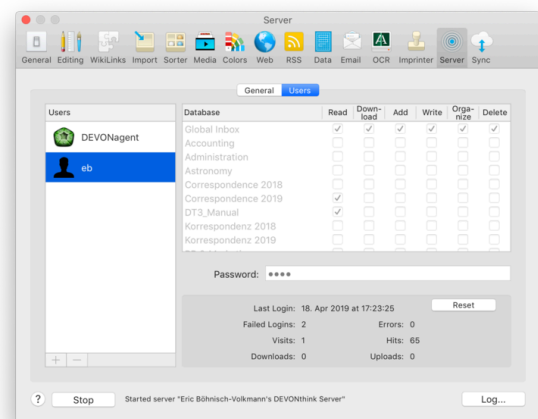
- **TLS Certificate:** If you have a TLS Certificate, select it from this dropdown.
- **P12 Certificate:** If you have been issued a [P12](#) file, import it by clicking the *Load P12 file* button.
- **Self-signed Certificate:** If you have neither, it's possible to generate a self-signed certificate for the server. When this option is chosen, users connecting to the server will be prompted the certificate may be insecure. Instruct them to accept your

certificate as valid to allow their browser to accept your server's identity.

- **Allow insecure HTTP connection on port:** DEVONthink's server runs on SSL connections for secure browsing. If you have a compelling reason to use the older *http* protocol, check this box and enter the port to be used.

Note: When using the server in administered networks, e.g., public, corporate, or educational scenarios, you may need to consult with the IT department for successful operation.

## USERS



**User List:** The *Users* tab on the left allows you to add and remove individual users, as well as set per database permissions for them.

- **Add:** Click the + button to add a new user.
- **Remove:** Click the - button to remove a user.
- **Password:** Enter a login password for the selected user in the *Password* field under the *Databases* list.

Note: If you have DEVONagent Pro installed, it will be added as a default user. This allows it to search DEVONthink's databases in the same way it searches other websites.

**Database Permissions:** The *Databases* list on the right allows you to set per-database permissions for the selected user. All open databases will be listed in this pane, followed by the permissions that can be set. When a user is selected in the *Users* pane, you can set specific permissions for that user. The permissions are as follows:

- **Read:** Allow the user to access the database. When unchecked the database will not be visible to the user.
- **Download:** Allow the user to download documents from the database.
- **Add:** Allow the user to add items to the database.
- **Organize:** Allow the user to move around documents and groups in the database.
- **Delete:** Allow the user to delete items in the database.

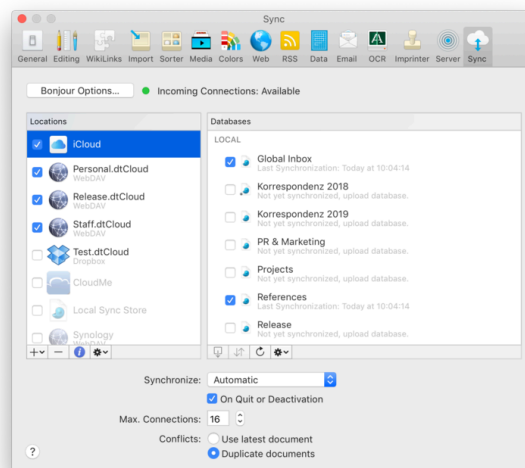
Note: Right-click the database's name to quickly enable or disable all permissions for that database.

**Technical Info:** If you need more information on the activity of the web server, you can find some deeper details here.

- **Server Details:** The section under the *Databases* pane shows some basic technical data about DEVONthink's server activity.
- **Log:** In cases where deeper technical information about the server's activities is required, click the *Log* button in the lower

right corner. The log file will open in macOS' Console application.

## SYNC



DEVONthink allows you to keep your databases in sync with multiple Macs and iOS devices running DEVONthink To Go. Use these options to control which databases are synced, how often they're synced, with which locations. Learn more about synchronization and how to set it up in a [separate part of this documentation](#).

## LOCATIONS

The first column lists all sync locations you have set up. In addition it lists available direct connections and templates for quickly setting up new locations. Active locations are checked. Disabled, inaccessible, or unactivated locations are shown in grey. Locations that have an encryption key specified show a key icon to the right of the name.

Check any location to activate it. If it is not yet set up, DEVONthink will show a sheet requesting all necessary details. Only a subset of the following fields is shown, depending on the nature of the sync location:

- **URL:** The URL of your WebDAV volume including path to the folder where the sync store is located or shall be created.
- **User name:** The user name for the service.
- **Password:** The password for the service.
- **Sync Store Name:** The name of the sync store. If you are setting up an already active sync location, e.g., you've already synced from another device, click the dropdown menu to choose from a list of existing stores.
- **Encryption password:** The password used to encrypt the sync store with AES 256 bit encryption.
- **Synchronize label names & colors:** Check if you want to bidirectionally synchronize label names and colors using this location. Be aware, changes to the colors and names on any syncing machine will sync to the others.
- **Synchronize reading positions:** Check if you want to bidirectionally synchronize reading and playback positions using this location. This can help you keep your place in PDFs you're reading or audio/video you're playing.
- **Synchronize content of indexed files:** Check if you want to synchronize the content of indexed files using this location. If you uncheck this option only the metadata about the document will be

synchronized. This is generally only used in special circumstances.

- **Verify uploaded items:** Check to verify all uploaded items to make sure that they're intact. Usually only necessary on very unstable network connections or in case you experience troubles with defective files.

Use the tools below the locations list for more options:

- **Add:** Click the + icon to add locations not listed by default, e.g., adding another local sync store.
- **Remove-:** Select a location and click - to remove the location.
- **Info:** Select a location and click to show and change the location properties.
- **Action:** Select a location and click for further options including revealing local sync stores in the Finder, verifying their consistency (hold the  $\text{⌘}$  Option key to verify thoroughly), or cleaning the location.

These commands are also available via the contextual menu.

Note: You can also add existing local sync stores (packages with the file name extension `.dtCloud`) by dragging them into the locations list, DEVONthink's Dock icon, or by simply double-clicking them.





## DATABASES

The second column lists all currently open databases as well as all databases available remotely in the selected location. Import remote databases by double-clicking them or via the contextual menu.

Check any database that you want to have synchronized using the selected location. If the database is also already available through the location, both versions of the database will be merged and conflicts solved using the chosen conflict solving strategy (see below). Uncheck databases you want to discontinue syncing with the selected location.

**Note:** Unchecking databases does not remove the sync data from the location.

Use the tools below the locations list for more options:

- **Import:** Select a remote database and click  to download the data of the database and save it locally. The database will be automatically configured to sync with this location. Alternatively, you can double-click a remote database to import it.
- **Sync:** Select a checked database and click  to manually sync the database with this location.
- **Refresh:** Refreshes the list of remote databases for the selected location.
- **Action:** Select a database and click  for further options including verifying its consistency (hold the  Option key to verify thoroughly) or clean the sync data from the selected location.

## OPTIONS

Change the general sync settings, noting they affect all locations and databases.

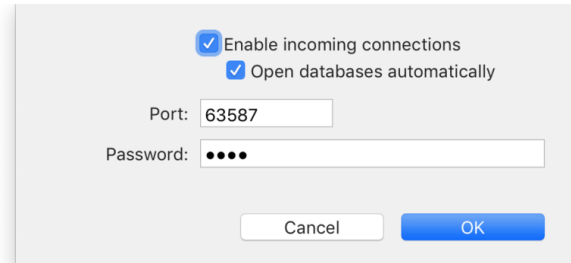
- **Synchronize:** Choose if you want to synchronize automatically, manually, or in fixed intervals. Check *On Quit or Deactivation* to automatically synchronize

when you quit DEVONthink or when you switch to another application.

- **Max. Connections:** Choose the maximum number of connections DEVONthink should open. The faster your internet connection the higher you can usually go. The recommended value is 16.
- **Conflicts:** Choose how to solve the conflict if an item was changed both locally and remotely. *Use latest document* preserves the most recently changed document. *Duplicate documents* keeps both versions of the conflicting item and appends "copy" to the end of one's filename.

**Note:** The number of maximum connections used is controlled by the service you're using.

## BONJOUR OPTIONS



Click the button *Bonjour Options* to control if and how other instances of DEVONthink or [DEVONthink To Go](#) can connect to your Mac. Your Mac becomes the sync host or sync server, the other devices the clients.

- **Enable incoming connections:** Check to let other devices connect to your copy of DEVONthink and synchronize.
- **Open databases automatically:** Check to open databases automatically if the connecting side (client) requests it.

- **Port:** If needed you can change the IP port number used for incoming connections. Leave empty to let DEVONthink choose the best port number for you (recommended).
- **Password:** Set the password necessary to connect to your instance of DEVONthink

(mandatory). This password is also used for AES-256-bit-encrypting the connection at all times.

# TROUBLESHOOTING

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DEVONthink 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 DEVONthink or its databases, please check the following sections.

## PROBLEMS IMPORTING FILES

### WHY DOES DEVONTHINK NOT RECOGNIZE MY FILES?

If DEVONthink does not recognize a file, make sure the file has a proper file name extension. DEVONthink 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.

Also, while DEVONthink supports importing many different file types, there are thousands of types and we can't guarantee trouble-free importing or usefulness with every type.

### WHY DOES DEVONTHINK NOT DISPLAY MY DOCUMENT CORRECTLY?

DEVONthink uses Apple's Quick Look technology to display previews of many file formats. If a document is not properly displayed, especially if it is a proprietary file format, it may be you don't have a Quick Look plugin installed for this file type or the application that created the file is not installed on your Mac (and supports Quick Look). Control-click the file and choose *Show In Finder* to reveal it. With the file selected in the Finder, press the spacebar to open a Quick Look window to determine if the item is viewable.

### WHY ISN'T MY PDF WORKING?

**Bad PDFs:** PDFs have been around so long, it would seem they'd be easily supported in DEVONthink. However, the truth is there are many bad PDFs out there. If you encounter a bad PDF, try acquiring a new copy of the file.

**No Text:** You will receive a "No Text" log message with PDFs having no text layer, i.e., scans that have not had OCR run on them. In order for their text to be searchable, you must run OCR on them.

**Protected PDFs:** DEVONthink cannot extract the text part of print- or edit-protected PDFs. When you import these PDFs, you get a log entry that tells you that the file contains "no text". When you select these PDFs in DEVONthink, the status bar shows *Image* instead of *PDF+text*.

One potential 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 to extract the text for searching and classifying.

Note: There are sometimes questions regarding the PDF functionality available in other applications. DEVONthink uses Apple's PDFKit framework, the same as found in their Preview application. If you have an issue with a PDF in DEVONthink, check to see if you have the same issue in Preview. Other applications, including those from Adobe where PDFs were invented, are using their own frameworks.

## EMAIL IMPORT DOES NOT WORK AS EXPECTED

### Messages aren't imported or can't be filed:

Email messages are imported with a special identifier (UUID) that helps DEVONthink keep track of messages that have already been imported. Since a UUID must be unique, you can't have more than one file with that identifier. If you try to import the same message into a database, you will receive a logged message stating "n emails already imported".

### Importing takes a long time or stalls:

Importing email is not a trivial process. Not only does it copy the message into your database, but it also reads and analyzes the entire contents of each one. If you are importing a large mailbox, the process could cause a timeout.

To increase the timeout to five minutes, please enter this in `/Applications/Utilities/Terminal.app` (each as a separate command) while DEVONthink is not running:

#### Terminal:

```
$ defaults write com.devon-technologies.think3 MailImport.FetchTimeout -float 300

$ defaults write com.devon-technologies.think3 MailImport.Timeout -float 300
```

Another possibility is to split the mailbox into multiple smaller ones. Lastly, you don't have to import the entire mailbox at once. Importing smaller batches often proves to be less taxing on the machine's resources.

### Why can't I import from email application

**X?:** Inter-application communication, something at which DEVONthink excels, isn't universally developed. In order for more true automation between applications to occur, the developers need to implement robust and reliable mechanisms, like AppleScript. Some apps may provide simple URL schemes but they are limited in use and capabilities, often only able to process one file at a time. Better results can usually be had by merely dragging and dropping. For email clients with a good AppleScript dictionary, the potential for streamlined workflows is increased.

Note: If you are running macOS Mojave or later, you will need to give permissions for the Apple Mail plugin to access your email.

- Quit DEVONthink.
- Quit Apple Mail.
- Enable *Full disk access* in *System Preferences > Security > Privacy for DEVONthink*.
- Launch DEVONthink and install (or reinstall) the Mail plugin from the *DEVONthink > Install Add-Ons*.
- Launch Apple Mail and enable the plugin via *Apple Mail > Preferences > General > Manage Plug-ins*.

## UNLOCKING A DATABASE

If you open DEVONthink and see an icon of a crossed pencil to the right of the database's name, the database has a file permissions issue. This makes the database readable, but not writeable, so you can't modify the contents in any way.

A permissions issue like this uncommon but generally caused by three events, in order from most to least common: restoring from Apple's Migration Assistant, restoring from Time Machine, or an operating system or hardware error. Doing things like using Migration Assistant will not always cause a permissions issue, but if you have a crossed pencil icon and you've recently migrated to a new machine, this would be the likely cause.

To resolve the issue, do this:

- Close the database in DEVONthink.
- Locate your database. If it's the Global Inbox, it's located in `~/Library/Application Support/DEVONthink 3`. For

other databases, do a Spotlight search for `kind:database dtBase2`.

- Select the database file and press `⌘I` to show the *Info* pane.
- At the bottom, you'll see *Sharing & Permissions*. Click the *lock icon* to unlock it. You will be prompted to enter your administrative password. (This is the password you use to log into your account on your Mac.)
- Make sure the account marked (*Me*) is set to *Read & Write*.
- Click the Action menu and choose *Apply to enclosed items*, if it is available, then close the *Info* pane.
- Double-click the database file to reopen it in DEVONthink.

If this does not resolve the issue, please [contact our support team](#).

## 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. macOS assigns these shortcuts and has ultimate control over which application or service gets what. If the DEVONthink *Services* menu items do not have shortcuts assigned, it is likely that macOS assigned these shortcuts to another command, or that they are used by the current active application.



## WHY DO SPECIFIC SERVICES NOT APPEAR IN THE MENU?

The operating system relies on information supplied by the current application to determine which services should be shown in the *Services* menu. For some applications, often those developed for both Mac and Windows, this information may not be what's anticipated. When this occurs, certain services may not be present. For example, selecting text on a web page in Firefox will display the service *DEVONthink: Take Plain Note*. The same text on the same page in Safari will show that option as well as *DEVONthink: Take Rich Note*.

## SYNC ISSUES

DEVONthink's synchronization was designed to run in self-maintenance mode. If you are having issues syncing your DEVONthink databases, the first place to look is [Windows > Log](#). Most sync related errors and reports will be shown here.

Below we cover some things you can check for the type of sync method you're using as well as some common questions you may have.

### THINGS TO TRY FIRST

Here are a few general things to try when you have a sync issue:

- Check your network connections, including trying to log into a remote service.
- Reboot the computer
- For non-Bonjour and non-iCloud sync locations, make sure you're entering the correct store name. When logged into

a remote service, the *Sync Store Name* dropdown should list available sync stores to choose from.

- Make sure you're using the correct encryption key value for the sync location.  
[See also p. 156ff](#)
- Make sure you have sufficient space for sync data, especially when using cloud accounts.

### VERIFY & CLEAN

**Verifying:** If there is an issue reported with syncing, e.g., broken structures or missing manifests, you can verify the sync data to see if it's intact and consistent. Verification is a good first step in these cases. The results of a verification will be reported in the log window.

**Cleaning:** If the verification fails, you can clean the sync location or database to remove the sync data in that location. The results of the clean will be reported in the *Log* window. After a successful clean, you can upload the database(s) again.

**Note:** To ease anyone's mind, cleaning a sync location has no effect on the local databases on your devices. Sync data is not your database and is separate from the local databases on your devices, Mac and mobile.

To verify or clean sync data, open [Preferences > Sync](#) and...

- **Sync Location:** To clean or verify all the sync data from a specific location, Control-click it and choose the appropriate command. For a verification you can hold the  $\text{⌘}$  Option key and choose *Verify*

*Location Thoroughly* to perform a deeper verification of the sync data. For a remote sync location, there may be a pause while a connection is established.

- **Database:** To clean or verify the sync data for a specific database, select the sync location to display the databases list. Control-click the specific database and choose the appropriate command. For a verification you can hold the  $\text{⌘}$  Option key and choose *Verify Database Thoroughly* to perform a deeper verification of the sync data. Repeat this with any databases, as needed.

Both these actions can be used at any time, for preventative purposes or just to get a fresh start with syncing. Also, you may see unwanted databases in the *Remote* section of the databases list for a sync location. Cleaning the location will remove these databases too. But if you want to keep the sync data for your current databases, you can Control-click and clean specific databases in the *Remote* section.

## BONJOUR

Bonjour syncs are generally transparent, but it can only be used on a local network that allows Bonjour traffic and non-standard ports. Many public networks disallow this kind of traffic to protect their customers. Also, corporate networks will often disallow this traffic for security reasons.

**Note:** Bonjour connections cannot be used over VPN. This is technologically infeasible, at least at the moment.

- Make sure you have entered the same password that you have set in the server Mac's Bonjour options. [See also p. 146ff](#)
- Make sure DEVONthink is running on the other Mac or iOS device and both devices are awake.
- Make sure only one device is acting as the Bonjour server for a given database. You should not have two devices with incoming connections enabled trying to serve the same databases.
- Make sure the databases you want to synchronize are open on the other Mac, or enable [Preferences > Sync > Bonjour Options: Open databases automatically](#) on the server Mac.
- Restart the other Mac, the iOS device, or both.
- Make sure this computer is connected to the same network as the other syncing device.
- Make sure any firewalls or applications like Little Snitch are allowing traffic from DEVONthink.
- Check if there are any routers or switches involved. The more switches and routers the less reliable the connection due to port filtering, conflicts, or other unknown factors.
- Restart your router.

If you find yourself on a network that disallows Bonjour syncing, it is possible to connect your iOS device to your Mac via your Lightning cable. This creates a simple ad-hoc network that will allow Mac-to-mobile syncing. If you are in a corporate situation, please discuss this with your IT department to ensure you're not violating any security policies. They may also issue an exception

for a specific port you could use for Bonjour syncing. This port would be entered in the *Port* section of the Bonjour options.

## ICLOUD

Since your devices are generally signed into your Apple ID, using iCloud for syncing is the easiest to set up. However, it should be understood it can only be used for personal syncing. Collaborative syncing is not possible unless all participants are sharing an Apple ID.

Also, syncing to iCloud is done locally first, the operating system will then upload the changes to Apple's servers and propagate the information about it to all other devices. It generally happens smoothly and in the background but it means you can't expect the changes to be ready on other devices as soon as DEVONthink has finished synchronizing to iCloud.

Here are a few things to check:

- Make sure you have enabled *DEVONthink* in *System Preferences > iCloud > iCloud Drive > Options* on each device.
- Make sure all syncing devices are logged into the same Apple ID.

Note: Be aware iCloud can stall. This is a sporadic, but documented, issue that can cause your devices to get out of sync. This is not under our control, nor can we even detect it. Please try a [thorough verification of the sync location first](#). For further help, contact our support staff for assistance.

## WEBDAV

Our support for WebDAV services allows you to use cloud services that are WebDAV-enabled. It also presents some self-hosting options, even with some NAS devices.

However, they can sometimes be technically more difficult to implement. Here are some things to check:

- Make sure the service or device you're trying to connect to is reachable. This is especially true when self-hosting. If you see errors in the 500 range in the *Log* window, it's a problem with the remote server.
- Make sure you are using the proper protocol in the URL, `http://` or `https://`.
- Make sure the URL is complete. This will be specific to the device or service you're using. For a Synology NAS, for example, you have to add the target volume to the path (a valid URL would look like: `http://diskstation.local:5005/research`). Refer to the service or manufacturer's instructions for the proper URL construction.
- Make sure you have entered your user credentials correctly.

Note: WebDAV implementations vary so it's not possible to guarantee compatibility in all situations. For self-hosting, Apache implementations are the most compatible.

## DROPBOX

Dropbox is our longest supported sync method and is generally reliable and a good performer. However, there are a few things to consider.

According to Dropbox' rules, you cannot sync across user accounts. You also can't share the *Apps* folder between accounts. Also, they only allow our sync engine to be logged into one Dropbox account at a time. If you have a work and a personal account, you can only sync to one with DEVONthink.

- Log into your Dropbox account to make sure it's reachable. If you see errors in the 500 range in the *Log* window, it is a problem with the remote server.
- Make sure you are connected to the correct Dropbox account. The active account will be shown under the sync location's name in the sync preferences.

Collaborative syncing may be possible using a common Dropbox account, i.e., using the same username and password for syncing. But again, you can only sync to one active Dropbox account at a time.

## COMMON QUESTIONS

### **I enabled the sync and nothing's happening:**

Our sync engine will not sync, upload or download, without being told to. We believe in opt-in processes whenever possible. Merely enabling a sync location just sets up a location to be ready to receive and transmit data. You need to enable individual databases to sync. If you have enabled databases to sync, check [Window > Log](#) for errors.

### **I'm seeing a message about an invalid**

**encryption key:** When you set up a sync location, you have the option of entering an encryption key. This is used to scramble and descramble the sync data so it's stored in an encrypted state. Once you've synced the first time, this value, even if you aren't specifying

a key, is stored for that sync location. This value must be entered on other devices syncing with this sync location.

You can't add, remove, or modify the encryption key value for a sync location after the first sync. If you want to make a change, you must [clean](#) the sync location first. After the clean, Control-click the sync location again, choose *Show Info*, and make the modification to the key. After the first sync, this will be the value stored for the location. Remember, you must change the value on the other syncing devices. And no, you do not need to do the clean on the other devices before changing the value.

### **I am seeing a message about missing**

**manifests:** Missing manifests are bits of transactional sync data that cannot be located by the sync engine. When this occurs, it can't validate the information about what has been synced. This is not an issue with the databases. See the [Verify & Clean](#) section above regarding verifying and cleaning the sync data.

### **It's telling me I have a duplicate database**

**UUID:** As noted in the [glossary](#), a UUID is a unique value given to all DEVONthink databases. If you copy and rename a database file in the Finder, this UUID is preserved and DEVONthink sees two databases with the same UUID. This will not sync correctly. Please [contact our support team](#) for assistance on resolving this.

## REPAIRING A DEFECTIVE DATABASE

DEVONthink 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 finds inconsistencies during start-up, it is time for some housekeeping.

First we'll deal with the two common terms you'll see in a repair process: missing and orphaned files. Then we'll give you steps to try and restore some order in your databases.

### MISSING FILES

All documents in a DEVONthink database have a path the file system where their content file is located. This path is stored for every document, imported or indexed. If DEVONthink can't find a file at a path stored in its index, it will be reported as missing.

The most common cause of missing files is [indexed files](#) being moved in the Finder, or the indexed parent folder being renamed. In the first case, the file isn't in the location it was indexed from. Moving the file back into place will resolve this issue. In the second case, the path no longer exists as the names in the path have changed. Changing the name back will resolve this.

The second most common cause of missing files is people modifying the internal contents of a database. Some Finder replacement applications, like PathFinder, allow you to access package files like normal folders.

The internals can also be accessed by other methods, like the command line or the Finder's contextual menu. If you delete or reorganize anything, you can easily cause missing files.

**Note:** Modifying the internal contents of a database outside DEVONthink is unsupported behavior and can lead to broken or inconsistent databases. You should only get into a database's internals when instructed to by our support team.

### ORPHANED FILES

Just as with any database application, controlling the data flow in and out is a critical process. DEVONthink should be the gatekeeper of the files in its databases. If an external agent, whether an application or a user, adds files outside DEVONthink, they will cause an internal inconsistency and lead to orphaned files when following the steps below.

The most common cause of orphaned files is a simple and common one: attempting to create revisions. Say you open a file, a Word document, in an external application. As you are reading it, you decide to make some changes. You type your edits, and select *File > Save As* (or *File > Duplicate* the file first). The application most commonly will open the *Save* dialog in the location of the original file, in this case, inside the internals of the database. You have just created an orphaned file DEVONthink knows nothing about. So the question becomes, how do I create a revision without causing this issue?

- **Duplicate:** Duplicate the item in DEVONthink first.
- **Rename:** Rename the duplicated item. This can be quickly done by immediately pressing ↵ Return, typing the change, then pressing ↵ again.
- **Open and Edit:** Now you can open the new file and make your edits.

The other common cause is the same as with missing files: getting into the database package and adding files manually.

### STEP 1: VERIFY & REPAIR

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

**Note:** *Verify & Repair* isn't just for emergencies. Running this command on an occasional basis is not a bad idea. In fact, if you're a fairly heavy user of DEVONthink, running it weekly or bi-weekly does no harm. It's just a routine checkup.

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

### STEP 2: RESTORE FROM BACKUP

DEVONthink keeps up to two copies of the index files in case that the index is damaged beyond repair.

To restore the index file(s) from a previously saved internal backup, hold the ⌘ Option key and select [File > Restore Backup](#). DEVONthink 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 chosen backup metadata (the current set of index files becomes the backup, the backup becomes the current set) so that data is never overwritten. Run [File > Verify & Repair](#) to check the consistency of this index version and if everything is in the right order use [File > Optimize](#) to optimize your database and have DEVONthink 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's index are stored independently within the database package, the index can be rebuilt at any time without you losing metadata. However, we generally only suggest this when troubleshooting a database issue.

To rebuild the database from scratch, use [File > Rebuild Database](#). During the rebuild process, the index is completely recreated. Your actual files are not touched. Any problems that occur during this process are [logged](#). Also, a new backup metadata set will be created at the beginning of the rebuild.

## STEP 4: RECOVER OR MANUAL REBUILD

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

**Time Machine:** 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.

**Manual Rebuild:** If you find yourself in the unfortunate situation where you have no backups, it may be possible to rebuild your database manually, following these steps:

- Locate the database (.dtBase2 file) in the Finder.
- Rename the file by adding, e.g., an x to the beginning of the name.
- Control-click the database and choose *Show Package Contents* in the contextual menu.
- Copy the most recent backup folder where your database is located.
- Copy the Files.noindex folder into the copied Backup folder.
- Rename the copied Backup folder to the previously used name and add the file extension .dtBase2, okaying the extension when prompted.
- Double-click the new database file to open it in DEVONthink.
- Use [File > Verify & Repair](#) to ensure that the database is operating properly.

## STEP 5: CONTACT SUPPORT

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

Note: In a worst case scenario, if you do not have a current backup of your documents and a manual rebuild didn't work, 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, Control-click it, and choose *Show package contents* from the contextual menu. Copy the files in the Files.noindex subfolder, which are sorted by kind, to a safe location, e.g., the desktop. If you want, you can create a new database, re-import the files, but you will have to rebuild the database's structures, tags, etc.

## DEVONTHINK CRASHES

If DEVONthink crashes while it's running, please hold the  $\text{⌘}$  Option key and choose [Help > Report Bug](#).

If DEVONthink crashes on startup, there is no opportunity for you to use our bug reporting mechanism. However, you can manually retrieve the crash logs:

- In the Finder, hold the  $\text{⌘}$  Option key and select *Go > Library*.
- Open the Logs/DiagnosticReports folder and locate the most recent crash report for DEVONthink. (The date and time is in the filename.)
- Attach the crash log when you [start a support ticket](#).

In either case, please try to reproduce the crash before reporting it. Also provide enough detail about what you were doing at the time of the crash.

## DEVONTHINK BEHAVES IRRATIONALLY

No software on this planet is bug-free, and if an application behaves irrationally 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 you see odd behavior like

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

the first step is to reboot the machine.

If that doesn't resolve the issue, try deleting DEVONthink's preferences files. Please quit DEVONthink, launch Terminal app, and enter this:

#### Terminal:

```
$ defaults delete com.devon-technologies.think3
```

Note: Rebooting a machine can often cure a host of issues, closing down rogue processes, releasing memory, etc. We suggest rebooting your devices at least once a week, just to mitigate potential issues.

### STRANGE BEHAVIOR RELATED TO DOCUMENTS

If the strange behavior only happens with a particular document, it is possible 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 or if it the file itself.

If you have checked the appropriate sections and didn't find your issue or a resolution, please do the following: Hold the `⌘` Option key and choose [Help > Report Bug](#). This creates a draft email, ready to send to us, containing troubleshooting information and logs.

Note: The industry standard turnaround in software development is 48 business hours, i.e., weekends excluded. However, we usually respond earlier. Thanks for your patience and understanding.



# AUTOMATION

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Automation. No matter how efficient we are, there is always some process that could be done more quickly, and sometimes more accurately. This may be as simple as renaming a file, or as complex as filing, emailing, and archiving. While not everything can be automated, and careful thought should go into your automation plans, DEVONthink offers a level of automation capabilities rarely rivaled in other Mac applications.

**Applescript:** Most of DEVONthink is built on a solid foundation of AppleScript. Not only used in the scripts you can install from [DEVONthink > Install Add-Ons](#), they are also at the core of several pre-installed templates. Additionally, in conjunction with other AppleScript-enabled applications, the potential for automation on your Mac is

extraordinary. This mature but easy to learn technology is the one we will focus on. [See also p. 162ff](#)

**Smart Rules:** DEVONthink also offers a technology for those with little to no programming experience: smart rules. Smart rules are conceptually similar to smart groups but allow you to choose pre-defined actions to take on matched items. This makes them accessible to all users, while still providing AppleScript execution in the smart rules. They also allow automation based on events. [See also p. 170ff](#)

**Item Links:** While not an automation technology in itself, item links are item-specific identifiers in DEVONthink that can be used in automation. Providing a way to refer to files by a unique and unchanging value, they can help avoid automation problems when items are moved or renamed in your databases. [See also p. 176ff](#)

**Javascript:** In addition to AppleScript, Javascript for Automation (JXA) is supported. However, it is bridged by the operating system from AppleScript, not specifically coded for. We advocate AppleScript for its ease of use by new and less-experienced programmers.

On a side note, our AppleScript dictionary has a *do Javascript* command you can use to interact with web content viewed in a DEVONthink window. With a bit of creativity, some pretty amazing things can be done!

**AppleScript Objective-C:** This is supported, for those who are inclined that direction.

**Terminal:** For those who are into other technologies, like Python, bash, Ruby, etc., the question arises: Is there a command line interface (CLI) for DEVONthink? The answer is no. However, you can still use a *do shell script* command in AppleScript when needed. Actually, the combination of the shell and AppleScript creates even more opportunities, as their individual strengths compensate for the other's weaknesses.

## APPLESCRIPT

[AppleScript](#) is an automation technology introduced by Apple in 1993. Over the years it has matured and become the friend of many Mac users wanting to exert more control over their computing experience. Written in an easy to learn, almost conversational language, it offers a tremendous amount of power with less effort than many languages. DEVONthink has very robust AppleScript support and comes with many built-in scripts. These, and those you write or obtain, make it possible to automate nearly every aspect of the application, and to integrate the application with almost every other macOS application that supports AppleScript.

## INSTALLATION

**Add-On Scripts:** All add-on scripts that come with DEVONthink are automatically installed or updated when you open a new version of DEVONthink for the first time. You can, however, manually (re-)install them

by choosing [DEVONthink > Install Add-Ons](#). The scripts from this panel are installed in a number of locations:

- **Script Menu Extra Scripts:** These scripts are accessed from the global *Script* menu when you are in specific applications, e.g., Safari. They are installed in an application-specific subfolder of `~/Library/Scripts/Applications`. [See also p. 174ff](#)
- **Folder Action Scripts:** These scripts are used to create hot folders in the Finder. They are installed in `~/Library/Scripts/Folder Action Scripts`. [See also p. 175ff](#)
- **Apple Mail Rule Scripts:** These scripts are for use with Apple Mail Rules. They are installed in `~/Library/Application Scripts/com.apple.mail`. [See also p. 173ff](#)

**DEVONthink Scripts:** The internal scripts found in DEVONthink's [Scripts](#) menu are installed in `~/Library/Application Scripts/com.devon-technologies.think3`. The scripts will be found in one of four directories:

- **Menu:** These are the scripts found in DEVONthink's *Script* menu. [See also p. 166ff](#)
- **Toolbar:** These scripts are available to add as toolbar buttons. [See also p. 167ff](#)
- **Reminders:** These scripts will be executed when a reminder is triggered with an alarm of *Execute External Script*. [See also p. 167ff](#)
- **Smart Rules:** These scripts are used as *External Scripts* in the actions of smart rules. [See also p. 170ff](#)

Additional scripts, like those you write yourself, can be put into any of these folders to be used in these contexts. Other scripts that may include integration with DEVONthink can be located wherever it's convenient.

## SCRIPT SHORTCUTS

Many people like mousing around their applications, while others like to use their keyboards. If you want to add keyboard shortcuts to scripts in this menu, you have two options:

- **System Preferences:** Open *System Preferences > Keyboard > Shortcuts > App Shortcuts*. Add a shortcut for DEVONthink, enter the exact name of the menu item, and assign a hotkey.
- **Append Filename:** Locate the script in the Finder and append three underscores followed by abbreviated command keys and characters. For example, `eMail Current URL___Cmd-Alt-F2.scpt`. The command key abbreviations are as follows: `Cmd` stands for the ⌘ Command, `Alt` or `Opt` for the ⌥ Option, `Ctrl` for the ⌘ Control, and `Shift` for the ⇧ Shift keys.

**Note:** When using macOS Mojave, you will often be prompted by the operating system to allow applications to "control" on another. These permissions are stored in *System Preferences > Security & Privacy > Security > Automation*. Please make sure to allow any requests of these kind regarding DEVONthink's control of other applications or your automation attempts will fail for obvious reasons.

## LEARNING APPLESCRIPT

While this documentation is not an AppleScript language guide, all the scripts that come with DEVONthink are editable and can be explored or modified as you see fit. The separate sections in this chapter provide any required terminology and a simple example script or two. Additionally, there are some great resources available online and in print. For the official archived documentation, refer to [Apple's AppleScript web site](#). Some additional resources are listed below:

Online:

- [DEVONtechnologies Community](#)
- [MacScripter](#)
- [AppleScript, the Language of Automation](#)
- [TECsoft Hands-On Trainings](#)
- [Scripting Matters Trainings](#)

Books:

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

## BASIC APPLESCRIPT TERMINOLOGY

AppleScript is not a difficult language to learn. Its plain English approach of "talking" to applications and elements is easily understandable. However, like any language, there are some variations in the words you can use; dialects, if you will. AppleScript is implemented by the developer of an application, so the commands and parameters may be conceptually the same as another application's, but using a different term. This is certainly not meant

to be a complete guide to AppleScripting DEVONthink, but what follows are some common terms or concepts you're likely to encounter. The examples here and in this chapter are meant to give you basic ideas about scripting DEVONthink.

## TALKING TO DEVONTHINK

In AppleScript you "talk" to programs like DEVONthink using a `tell` statement, referring to the application either by its name or its bundle identifier. This might become incompatible with a future version of DEVONthink so we strongly recommend to refer to this application using the ID `DNtp`, like in the following statement:

### Example:

```
tell application id "DNtp"
close current database
end tell
```

## DEVONTHINK'S DICTIONARY

AppleScript-capable applications have their commands, elements, and properties listed in an AppleScript dictionary. DEVONthink includes a large dictionary as a great reference for you. To view the dictionary, open the Script Editor application, select *File > Open Dictionary* and choose DEVONthink in the appearing window. You can also add DEVONthink to your Script Editor library. Select *Window > Library*, click the *+* button and choose DEVONthink. This way you keep DEVONthink's dictionary at hand.

**Note:** The use of *the* is almost always optional, but including it can make the script seem a bit less robotic. For example, both lines in this script are functionally the same:

### Example:

```
tell application id "DNtp"
set state of children of current group to true
set the state of the children of the current group to true
end tell
```

As noted above, the dictionary is the best place to find specific terminology to be used with DEVONthink. However, here are two things to understand:

**Records:** Every item in a DEVONthink database is a record, a record with properties. Do a search for "record" in the dictionary and you'll see it's a fundamental unit with a wide range of properties associated with it. This means you won't be writing code like, `get the second rich text file...` You will be dealing with records with a particular type, in this case `rtf`.

There are many commands specifically for use with records: `create record with`, `exists record with...`, etc. Also note there are some commands that require the term `record`. For example: `move`, `delete`, and `convert`. You will see a dictionary listing `move record`, so you can see the command isn't merely `move`, it's `move record`.

**Parents and Children:** Another concept to understand is parents & children. Generally speaking, these classes deal with the container or the contents of some object. The parent of an object is the group containing it. The children of a group are the immediate contents of that group, i.e., it does not list the children of sub-groups. Children can be documents or groups; parents will only be groups.

### Example:

```
tell application id "DNtp"
set thisGroup to current group
name of (the children of thisGroup whose
(type is XML))
end tell
```

## USING LOCATIONS

One of the common tasks people want to perform with AppleScript is importing files to a specific group. In order to direct the files to a given location, you need to reference it properly. Below are three general options for choosing a location:

- **incoming group:** This targets the Global Inbox, or the inbox of a database when using `incoming group of current database`.
- **current group:** This targets the currently selected group in the current database.
- **display group selector:** This shows the group selector so you can choose a location on demand.

There are many times you want to direct files into a specific group. That group may not be the current group you're in and you may not want to choose a destination each time. Here are two common ways of specifying a particular group in your database to be a destination group in your script:

- **get record at...:** This command allows you to set a variable by specifying a group's location in your group structure. The location is a text string, always beginning with a forward slash denoting the root of the database.
- **get record with UUID...:** When using an [item link](#), you can use the alpha-numeric string from the reference URL to point to

a specific item. (This command works with both groups and documents.) This form is very useful since it doesn't change when an item's name or location changes.

### Example:

```
tell application id "DNtp"
set myGroup to get record at "/Inbox/New
Files"
import "~/Desktop/001.txt" to myGroup
set groupTwo to get record with uuid
"98BBF96D-7743-46C6-9EB4-51C6EF68373C"
import "~/Desktop/002.txt" to groupTwo
end tell
```

## WORKING WITH A SELECTION

Many times you want to process items you have selected in DEVONthink. Perhaps you want to generate a list of names and dates for use in a document you're working on. Below is a handler commonly seen in DEVONthink scripts:

- **repeat with thisRecord in (selection as list) ... end repeat:** This is a very common handler, used when processing a selection, single or multiple items.

### Example:

```
tell application id "DNtp"
if selection is not {} then
set nameList to {}
repeat with thisRecord in (selection as
list)
copy ((name of thisRecord) & ": " &
(creation date of thisRecord as string) &
return) to end of nameList
end repeat
create record with {name:"Files",
type:text, content: (nameList as string)}
in incoming group
end if
end tell
```

## INTERNAL SCRIPTS

The [Scripts](#) menu of DEVONthink, located to the left of the [Help](#) menu, gives you access to a large number of pre-made scripts, with more scripts available. These scripts are not only useful for every day use, but are also great for learning how to script DEVONthink.

All the scripts we provide are editable using the Apple's Script Editor, though we do suggest making copies to work on. They are located in `~/Library/Application Scripts/com.devontechnologies.think3/Menu`. Open this folder in the Finder with *Scripts > Open Scripts Folder* command. Add your own scripts to the menu by adding them to the appropriate subfolder in this directory, even creating subfolders of your own.

A complete listing of the installed scripts can be found here: [See also p. 223ff](#)

## TRIGGERED SCRIPTS

Triggered scripts are AppleScripts that you attach to an item in DEVONthink (a group or document) and that are executed each time you select the item. Items with attached triggered scripts show an AppleScript icon behind their name.

Using triggered scripts, you can add your own custom behaviors when interacting with items in your database.

## ATTACHING A TRIGGERED SCRIPT

While it's possible to write a script that specifies a triggered script for an item in DEVONthink, the usual method is manually attaching one.

- Select the item you want to attach a script to.
- Select [Tools > Get Info](#) or [Tools > Inspectors > Generic](#).
- Click the down arrow next to *Script* and choose *Select*. Note the script can be located anywhere, but it must remain in that location for the script to trigger. For convenience, you can create a folder for them in `~/Library/Application Scripts/com.devontechnologies.think3/Menus`.

## REMOVING A TRIGGERED SCRIPT

Since a triggered script runs when you interact with the item, it can sometimes be difficult to detach the script, e.g., if a script switches to another application when triggered. For instances like this, to remove a triggered script from an item do the following:

- Control-click the item you want to remove the triggered script from and choose *Get Info*.
- Click the down arrow next to *Script* and choose *Remove*.

## TERMINOLOGY

Triggered scripts are defined by a specific handler: `on triggered(var)`, where `var` is the variable representing the item the script is attached to.

### Example:

```
on triggered(theRecord)
tell application id "DNtp"
display alert "" & (name of theRecord as
string)
end tell
end triggered
```

## REMINDER SCRIPTS

[Reminders](#) have several pre-built alarms available for notifications. However, you can only specify one alarm per reminder. Reminder scripts are AppleScripts run by an alarm set on a specific reminder for an item. By using or writing your own, you can extend notification possibilities of your reminders.

### ADDING AN EXTERNAL SCRIPT

To add an external script as an alarm for a reminder, choose *Execute External Script*. The next dropdown lists any available AppleScripts in the `~/Library/Application Scripts/com.devon-technologies.think3/Reminders` directory. Add any of your own scripts to this directory to make them available for any alarm you set.

Currently, there is only one example script pre-installed:

- **Open Document:** Opens the document in a new window when the alarm triggers.

### ADDING AN EMBEDDED SCRIPT

Sometimes you only need to add a script for a specific purpose, not general use with all reminders. DEVONthink allows you to quickly write an ad-hoc AppleScript specifically for the current reminder.

To write an embedded script for a reminder, choose *Execute Embedded Script* as the alarm. Click the ... button and a popup will appear with a pre-built handler in place. Add your code as necessary, then press the compile button, the one with the stylized eye, to make sure it compiles correctly. If it does, you will see the code format itself subtly. If not, you will hear a system alert. Click outside the popup to dismiss it. When the alarm goes off, the script will be executed.

**Note:** When a reminder is set to *Once*, the reminder is removed and the embedded script lost after the alarm goes off. If you have code you'd like to potentially use again, put it in an [external script](#).

## TERMINOLOGY

Triggered scripts are defined by a specific handler: `on performReminder(var)`, where `var` is the variable representing the item the alarm is set for.

### Example:

```
on performReminder(theRecord)
tell application id "DNtp"
set label of theRecord to 1
say (name of theRecord as string)
end tell
end performReminder
```

## TOOLBAR SCRIPTS

Scripts can also be added to the toolbar of any DEVONthink window. While there is a limited amount of space available in a window's toolbar, this is a handy way to launch commonly used scripts with one click.

To add a toolbar script place the script into the folder `~/Library/Application Scripts/com.devontechnologies.think3/Toolbar`. In order for the script to be available for use in the toolbar, you must quit and relaunch DEVONthink. Then Control-click the toolbar of a DEVONthink window and choose *Customize Toolbar*. Drag your script into the toolbar and it's ready for use.

## TERMINOLOGY

Unlike some other script types, there are no special handlers required for a toolbar script. You only need valid AppleScript talking to DEVONthink.

### Example:

```
tell application id "DNtp"
  open tab for record (content record)
end tell
```

## SMART TEMPLATES

Some of the DEVONthink provided [templates](#) are "template packages" (`.dtTemplate`) and "smart templates" (`.templatescriptd`). Both templates provide a great deal of flexibility and power, like allowing for inclusion of language resources. With some creativity and scripting know-how, you can set up everything from commonly used group hierarchies to daily journal entries and much more.

## TEMPLATE PACKAGES

The simpler type of automated templates DEVONthink supports are: template packages. These are folders with the file name extension `.dtTemplate` that contain

one or multiple `.lproj` folders, one for each supported language. Depending on the system language, you can let DEVONthink import the files in the correct language. If you inspect the contents of a template package, e.g., *Classifications > Decimal Filing System.dtTemplate*, you will see the project folders and their assets as a great example of this type of template.

## SMART TEMPLATES

The more advanced type of automated templates are smart templates. These are not simple files, but actually AppleScript packages containing script code, and often including related assets that can be inserted into your database. This allows for some very powerful actions like:

- The script can add information to the built-in 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 TEMPLATES

**Template Packages:** To create your own template package, you can duplicate an existing template, Control-click it, choose *Show Package Contents* and edit the internals as needed. Also note [exporting multiple selected files](#) will yield a template package.



**Smart Templates:** To make your own smart templates, have a look at the prefabricated smart templates. Duplicate a `.templatescriptd` file, like the "Note" template. Control-click it, and choose *Show Package Contents*. You can inspect and modify the supporting assets and the `main.scpt` file to fit your needs.

## TEMPLATE PLACEHOLDERS

Placeholders in templates are simple control codes that are replaced by DEVONthink when a template file is imported. These placeholders can be used in your files, including simple templates, or folder names of your templates packages. When used in files, they are typed in the text of DEVONthink-native files; e.g., plain or rich text, Markdown, etc. These can be manually typed or you can Control-click in the text and choose *Insert Placeholder*. Below is a list of valid placeholders:

- **%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
- **%author%:** The author entered in [Preferences > Editing > Author](#)
- **%username%:** The user's name
- **%fullUsername%:** The user's full name
- **%organization%:** The user's organization from Contacts
- **%emailAddress%:** The user's email addresses from Contacts
- **%host%:** The host name
- **%databaseName%:** The database name
- **%databasePath%:** The database's path
- **%groupName%:** The name of the parent group
- **%topGroupName%:** The name of the top 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

Note: There are more placeholders from the contextual menu than can be used in a template. For example, the placeholder `%record_locality%` relates to an existing record, so this placeholder will not be used when creating a file from a template.

**Custom Placeholders:** One more powerful feature of smart templates is the ability to define custom placeholders, extending the possibilities beyond the list shown here. This allows you to add a custom placeholder in the text of a template, then define the replacement value for that placeholder in the `main.scpt`. As a great example, check out the use of the custom `%project%` placeholder in

the Project smart template. Notice the use of the placeholder in the enclosed rich text file and the script.

## TERMINOLOGY

With the internal script of a smart template, there are no special handlers required. However, the internal script must be located in the `Contents/Resources/Scripts` folder inside the package, and it must remain named `main.scipt`. Beyond that, you only need valid AppleScript.

## SMART RULES

Smart rules are smart groups, evolved. Built in the same style as smart groups, smart rules don't just show items matching criteria, they can act on them! From something as simple as adding (or changing) a color label, to modifying a filename then filing a document in another location, smart rules provide some powerful automation possibilities. And they're not just for the technically inclined. No programming experience is needed for almost every action available.

Smart rules are conceptually simple and can be summed up as follows: *When this event occurs > do this action > on items matched > in this location*. Smart rules are made of four parts:

- **A location:** This is where the smart rule will look for matching items.
- **Matching criteria:** Like a smart group, you can specify criteria to be matched. The smart rule will only act on the matched items.

- **An action:** This is the action the smart rule performs when the event occurs.
- **An event:** This is an event that causes an action to occur, e.g., an "On Quit" event. If used in a smart rule, a specified action would run when you quit DEVONthink.

## CREATE A SMART RULE

Smart rules can be created in one of two ways:

- Click the + button at the bottom of the sidebar and choose *New Smart Rule*. The *Search in* dropdown will target the current location.
- Control-click an item in the sidebar and choose *New Smart Rule* from the contextual menu. This will specifically target that item in the *Search in* dropdown.

Note in either case you can change the *Search in* parameter to target other locations, including all open databases.

Note: Smart rules are considered global objects and can be created only in the *Navigate* sidebar of a main window. If you want to create a smart rule for a group in the item list, choose *Data > Reveal to display it in the sidebar*.

When you create a new smart rule, you will be shown the predicate editor, just as you see with smart groups. Just follow these simple steps to define the parameters of the rule (with an example):

- **Name:** Give the rule a name, like *Label Edited Screenscaptures*.
- **Location:** Set the *Search in* dropdown to target your desired location, like a group you add screen captures to. The more

specific the better; a good idea is to use e.g., a database's inbox.

- **Matching:** Add any criteria to be matched, e.g., *Name begins with screen* and *Kind is Image*.
- **Event:** Choose an event to trigger the smart rule, like specifying *On Save* to run the smart rule when matched items are saved in DEVONthink
- **Action:** Choose an action for the smart rule, perhaps *Change Name* to add "\_edited" to the name.

This rule shown above would add "\_edited" as a suffix to the name of any edited images whose name begins with "screen".

**One step further, chained actions:** If you hadn't noticed, there's a + button to the right of the action you specified. And yes, that means you can chain multiple actions in a smart rule! For example, we could add an action to open the edited image in the system default application after it has been renamed.

**Note:** Bear in mind, smart rule actions run in series, i.e., the actions run from top to bottom, first to last. This means the order of the actions affects the outcome. Think carefully about this if you decide to create chained actions.

We hope this has given you a good overview of creating a smart rule. Please see the appendix for a complete list of available [Events](#) and [Actions](#).

For those interested in the *Execute Script* action, continue to the [next section...](#)

## IMPORTING AND EXPORTING

Smart rules can be exported to the Finder, sent by email, and e.g., reimported to DEVONthink on another Mac. Drag a smart rule to the desktop to save it to a file or Control-click it and choose *Export*. Double-click a saved smart rule to import it, drag it into the sidebar, or Control-click into the sidebar and choose *Import*.

## SMART RULE SCRIPTS

Smart Rule scripts are AppleScripts run by an *Execute Script* action in a smart rule. These scripts allow you to extend the possibilities beyond the already powerful pre-defined actions.

**Note:** Smart rule scripts will be executed based on the event handler in the specific rule. For testing, it can be useful to set the event to *On Demand*. This way you can select the rule to see its matches, then Control-click it and choose *Apply Rule* to run it and see the effects on the matched items.

Also be aware the effects of smart rules are very broad, i.e., they affect all the items they match. While you are testing, it's a good idea to put some limiting criterion in place. For example, instead of matching all images in all databases, try matching images in a specific group or only images that begin with "Screen".

## ADDING AN EXTERNAL SCRIPT

To add an external script to a smart rule, add an *Execute Script* action and choose *External*. The next dropdown lists any available AppleScripts in the ~/Library/

Application Scripts/com.devon-technologies.think3/Smart Rules directory. Add any of your own scripts to this directory to make them available for any smart rule you define. Here is a list of the pre-installed scripts, for everyday use and your education:

- **Check Links:** Check if bookmarks are valid.
- **Close All Databases:** Closes all databases but the Global Inbox.
- **Download Bibliographic Metadata:** Attempts to retrieve the [digital object identifier](#) (DOI) of the document and set the title and metadata.
- **Move Into Database:** Moves indexed files into the database.
- **Move to External Folder:** Moves imported files out to the Finder when they're located in an indexed group.
- **Reminders - Next Week:** Set a reminder for a week from the current time and date.
- **Reminders - Remove:** Remove an applied reminder from the matched item(s).
- **Reminders - Tomorrow:** Set a reminder for the same time tomorrow.
- **Tags - Add Keywords:** Automatically adds Tags from the concordance of the matched file.
- **Tags - Assign:** Automatically adds tags, based on Apple's machine learning technology for images or hashtags and known tags in titles and content.
- **Downloads - Add Embedded Images:** [Add embedded images to the Download Manager](#). Used with HTML-based files, e.g., web archives, etc.
- **Downloads - Add Linked Images:** [Add linked images to the Download Manager](#). Used

with HTML-based files, e.g., web archives, etc.

- **Downloads - Add Podcasts:** [Add detected podcast links images to the Download Manager](#). Used with podcast RSS feeds containing download links.

## ADDING AN EMBEDDED SCRIPT

There are times you may need to add some code for a specific situation. Similar to some other macOS utility applications, DEVONthink allows you to write an AppleScript directly in the smart rule's editor.

To write an embedded script for a smart rule, add or specify an *Execute Script* action and choose *Embedded*. Click the *Edit Script* button and a popup will appear with a pre-built handler in place. Add your code as necessary, then press the compile button, the one with the stylized eye, to make sure it compiles correctly. If it does, you will see the code format itself subtly. If not, you will hear a system alert. When done, click outside the popup to dismiss it

**Note:** For those learning AppleScript, the repeat loop in the pre-built handler is a very common (and useful) code snippet for processing all files returned by a smart rule. Take note of it.

## TERMINOLOGY

Smart Rule scripts are defined by a specific handler: `on performSmartRule(var)`, where `var` is the variable representing items matched by the smart rule.

### Example:

```
on performSmartRule(theRecords)
```

```
tell application id "DNtp"
repeat with theRecord in theRecords
if (name of theRecord as string) contains
"Piglet" then
set state of theRecord to true
end if
end repeat
end tell
end performSmartRule
```

## APPLE MAIL RULES

When considering importing emails into your DEVONthink databases, the question of "automatic" email importing invariably comes up. While this isn't fully possible yet, there is a mechanism in Apple Mail that can provide some level of "automatic": *Mail Rules*.

Found in Apple Mail's *Preferences > Rules*, these are a rules consisting of criteria to be matched and an associated action (similar to [smart rules](#)). As incoming emails are detected, Mail will check for matches in a rule and execute any actions you've specified in the rule.

One of the actions available is *Run AppleScript*. Selecting this option shows a dropdown with any installed Mail Rule scripts. These scripts are installed in `~/Library/Application Scripts/com.apple.mail` folder. If you write or obtain other scripts for use with Mail Rules, they can also be placed in this directory. The scripts provided by DEVONthink are:

- **Mail Rule - Add attachments to DEVONthink:** Adds the attachment of the

message it acts on as separate documents to DEVONthink.

- **Mail Rule - Add messages to DEVONthink:** Adds the messages it acts on to DEVONthink.
- **Mail Rule - File messages & attachments:** Adds the messages it acts on including all attachments to DEVONthink.
- **Mail Rule - File messages & attachments hierarchically:** Adds the messages it acts on including all attachments to DEVONthink, recreating the mailbox structure.

## TERMINOLOGY

A full lesson on writing scripts for Mail Rules is beyond the scope of this help, but you can open and explore the installed scripts.

Do note there are two required handlers: using terms from application "Mail" and on perform mail action with messages theMessages for rule theRule, where theMessages is a variable representing the items matched by the rule. Here's a simple example:

### Example:

```
using terms from application "Mail"
on perform mail action with messages
theMessages for rule theRule
tell application "Mail"
repeat with thisMessage in theMessages
display alert "" & (subject of
thisMessage)
end repeat
end tell
end perform mail action with messages
end using terms from
```

Note: Mail Rules are controlled by Apple Mail, not DEVONthink. While they generally behave as expected, we can't control whether the rules will be triggered in Apple Mail.

## APPLICATION SCRIPTS

AppleScript is perfectly suited for integrating different applications, interchanging information, and creating workflows. DEVONthink comes with a number of scripts that exchange information between DEVONthink and other AppleScript supporting applications, like Safari or Mail.

The [Script Menu Extra Scripts](#) provided by DEVONthink are installed in an application-specific folder in `~/Library/Scripts/Applications`, e.g., `~/Library/Scripts/Applications/Safari`. These scripts are accessible from the global scripts menu in the menu bar at the top of your screen while you're in the specific application.

## MAIL SCRIPTS

Importing email into your DEVONthink databases is a possible use of AppleScript. Using AppleScript-enabled email applications, especially those with a robust scripting dictionary, increases the potential for processing emails. This can help you quickly file those emails directly into DEVONthink.

DEVONthink comes with scripts for Apple Mail, Microsoft Entourage, and Microsoft Outlook. Just select a message or mailbox in

a supported email application and choose the desired script from the global scripts menu. DEVONthink provides the following scripts:

- **Add attachment(s) to DEVONthink:** Adds the attachments of selected emails to DEVONthink.
- **Add mailbox(es) to DEVONthink:** Adds the selected mailboxes to DEVONthink.
- **Add mailbox(es) & attachments to DEVONthink:** Adds the selected mailboxes to DEVONthink. Attachments are imported separately.
- **Add message(s) to DEVONthink:** Adds the selected mailboxes to DEVONthink.
- **Add message(s) & attachments to DEVONthink:** Adds the selected mailboxes to DEVONthink. Attachments are imported separately.

Note: The import of entire mailboxes via AppleScript can be a resource-intensive process. Use the Apple Mail plugin for a more robust experience importing mailboxes.

## WEB BROWSERS

Depending on the capabilities of the web browser you're using, you may be able to use application scripts. We have included a handful of simple scripts that can be run while browsing in Safari or [DEVONagent](#).

- **Add abstracts to DEVONthink:** Creates a [sheet](#) containing information about items in a DEVONagent search. This includes

the title, score, summary, and URL of each result. (DEVONagent only)

- **Add linked images to DEVONthink:** Detects images on the current page and adds them to your database.
- **Add tabs to DEVONthink:** Adds bookmarks for active tabs the browser.
- **Add linked images to DEVONthink's downloads:** Detects images on the current page and adds them to DEVONthink's [Download Manager](#).
- **Add links to DEVONthink's downloads:** Detects URLs on the current page and adds them to DEVONthink's [Download Manager](#).

## OTHER APPLICATIONS

Obviously we haven't covered all the possible applications or scenarios on your machine, and we are sure you have ideas we haven't thought of. If you have an application you'd like to integrate with DEVONthink, check if it has an [AppleScript dictionary](#). If it does, the potential exists to communicate between the applications. But also be aware the commands, elements, and properties you can work with are coded by the developer of those applications.

## FOLDER ACTIONS

Folder actions are scripts that you can attach to folders in the Finder. These act on all items you add to these "hot folders." When you add items, the operating system detects the added files and runs any folder actions attached to the folder.

The actions supplied by DEVONthink are installed in `~/Library/Scripts/Folder Action Scripts`, and you can add your own scripts to this directory, as needed. For everyday use and exploration, here are the folder action scripts provided by DEVONthink:

- **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:** Index files to your database, creating links to the original items in the Finder.
- **DEVONthink - Index to selected group:** Index files to the currently selected group in your database.
- **DEVONthink - Import, OCR & Delete:** Imports files into your database, converts them to searchable PDFs if necessary, and moves the files to the trash afterwards.

## ATTACHING A FOLDER ACTION

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

- Control-click a folder in the Finder.
- Select *Services > Folder Actions Setup* from the contextual menu.
- From the list of available actions, select the folder action script click *Attach*.

**Manage folder actions:** To manage all your folder actions, Control-click a folder and choose *Services > Folder Actions Setup* from

the contextual menu. Use the Folder Actions Setup utility to see which folders have scripts attached, and to remove folder actions from folders.

**Note:** If you are running macOS Mojave, you will be prompted to allow the Folder Actions Setup application to run. This notification is controlled by the operating system, not DEVONthink.

## TERMINOLOGY

While we can't provide specific training on how to create folder actions, check out [Apple's documentation](#). However, the on adding folder items to folderVariable after receiving filesVariable is the handler most commonly used in our folder action scripts. Here is a simple example:

### Example:

```
on adding folder items to theFolder after
receiving theFiles
repeat with thisFile in theFiles
tell application id "DNtp"
set newRecord to import thisFile to
incoming group
if exists newRecord then tell application
"Finder" to delete thisFile
end tell
end repeat
end adding folder items to
```

**Note:** Folder actions, like any computer processes, are treated very literally. When processing files with a folder action, it's best to move or delete the files from the watched folder. This keeps the action from trying to reprocess files.

## ITEM LINKS

Every database, group, or document in your DEVONthink database has a URL ([uniform resource locator](#)) associated with it. While web URLs typically begin with `http://` or `https://`, DEVONthink's URLs take the form of `x-devonthink-item://` followed by a long alphanumeric ID. For PDFs, the link can contain a reference to a specific page. For audio and video, a reference to the current playback time. And for RTFs, you can get a reference to a specific paragraph in the document. These links can be used in any file type or application that supports live hyperlinks, e.g., the notes fields of OmniFocus tasks. This allows you to access DEVONthink documents as easily as clicking a link in a web browser.

You can get this item link manually by selecting a document or group and choosing [Edit > Copy Link](#). In addition you can manually extend the copied URL with the following parameters:

- **page:** Directly jumps to the specified page of a PDF. Usage: `page=<integer>`.
- **reveal:** Reveals a group instead of opening them. Usage: `reveal=1`.
- **search:** Directly jumps to the first occurrence of the search string. Usage: `search=<string>`.
- **time:** Directly jumps to the specified time in seconds in a video or audio document. Usage: `time=<float>`.

### Example:

```
x-devonthink-item://<groupID>?reveal=1
x-devonthink-item://<pdfID>?page=5
x-devonthink-item://<textFileID>?
search=iPad%20Pro
x-devonthink-item://<movieID>?time=43.5
```



Note: The first parameter after the ID is always added after a question mark (?), additional ones after an ampersand (&), and any values must be percent-encoded.

## TERMINOLOGY

Manually getting item links can be useful for some hard-coded cases, but there are many times you want to get them programmatically. There are two AppleScript properties for a `record` related to item links:

- **reference URL:** This is the item link as described above.
- **UUID:** This is the unique identifier of the item, i.e., the long alpha-numeric string in the reference URL.

Here is an example of getting and using an item link to create a Markdown compliant link on the clipboard:

### Example:

```
tell application "DNtp"
  set recordName to name of content record
  set recordURL to reference URL of content record
  set the clipboard to ("[" & recordName & "]" & recordURL & ")")
end tell
```

The terminology for using item links can depend on the capabilities of the application you're scripting. Here is an example, using a hard-coded URL, with an application that can open URLs:

### Example:

```
tell application "Opera"
  tell window 1
    make new tab with properties {URL:"x-devonthink-item://929D101B-35AC-474C-801C-D8818C48DB80?line=125"}
  end tell
end tell
```

```
end tell
```

**P.S.:** For the shell scripters, the URLs can be used with an `open` command.

## URL COMMANDS

URL commands are a type of [item link](#) that don't merely point to an existing file, they issue some special commands to DEVONthink. Though not as powerful as AppleScript, these commands can be used in special circumstances.

## TERMINOLOGY

The URLs are constructed from a single command and optional parameters, with the following format:

```
x-devonthink://<command>?
<parameter=value&parameter=value&...>
```

Note: The first parameter after the ID is always added after a question mark (?), additional ones after an ampersand (&), and any values must be percent-encoded.

Listed below are the commands and parameters available:

Commands:

- **createBookmark:** Creates a new bookmark.
- **createFormattedNote:** Creates a formatted note.
- **createGroup:** Creates a group.
- **createHTML:** Creates a new HTML document.
- **createMarkdown:** Creates a Markdown document.
- **createPDF:** Creates a PDF.
- **createRTF:** Creates a rich text document.

- **createText:** Creates a new plain text document.
- **createWebArchive:** Creates a web archive.
- **clip:** Opens the Clip to DEVONthink panel.
- **note:** Opens the Take Note panel.
- **search:** Initiates a search.

Parameters:

- **title:** The title of the item to be created (string).
- **comment:** A Comment to be added (string).
- **location:** The URL linking to the content, e.g., the URL of the website for the bookmark (URL).
- **tags:** Tags to be added (comma separated strings).
- **destination:** The UUID of a group where the item shall be created (string).
- **source:** The HTML content for HTML documents (string, only used by `createText`, `createHTML`, and `createFormattedNotes`).
- **text:** The text content for text documents (string, used by `createText` and `createMarkdown`).

- **width:** The page width (integer, only used by `createPDF`).
- **paginated:** Paginate the created PDF (boolean, only used by `createPDF`).
- **hide:** Hide and deactivate application after executing the comment (boolean).
- **noselector:** Skip group selector (boolean).
- **query:** The query to search for (string, only used by `search`).
- **reader:** Post-process the page (integer, 0 = no post-processing, any other value = post-process).
- **referrer:** The URL that referred to the item (URL).
- **selection:** The selected text (string, only used by `createRTF`).

#### Example:

```
x-devonthink://createText?title=New
%20;bookmark&location=http%3A%2F
%2Fwww.devontechnologies.com&noselector=1
```

Note: These are not x-callback-urls. An x-callback-url is a specific type of URL scheme that returns a value to the calling application.

# READ ME

## IN THIS CHAPTER

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This chapter contains the version history of DEVONthink, our end user license agreement (EULA), and credits.

## VERSION HISTORY

🟢 New   🟡 Improved   🔵 Fixed   🔴 Removed

### VERSION 3.0 BETA 3

This release brings many enhancements and fixes to DEVONthink. It improves the annotation workflow, adds more additional information to summarized highlights, and enhances the reading list. This beta also improves smart rules and placeholders, DEVONthink's premier place for automation. Many details changes to the user interface remove friction across all workflows from renaming items in the sidebar to reordering columns in the inspectors and new contextual menu commands. Beta 3 also brings many cosmetic improvements and bug fixes.

- 📌 Added a custom icon to the folder `~/Databases`, the default location for DEVONthink databases.
- 📌 Added command *Insert Quote* command to the popup menu of the [Annotations & Reminders](#) inspector to insert both the selected text and a back link. This is only supported by PDF documents.
- 📌 Added [Preferences > Media > Automatically resize](#) to toggle automatic resizing of PDF display. The same command in contextual menus of PDF view can now be used to change this setting temporarily.
- 📌 Added a *Move To Trash* command to the contextual menu of the [Reading List](#) to move the linked item into the database's trash. Emptying the trash afterwards deletes both the item and its reading list entry.
- 📌 Added *Duplicate as smart rule* command to the menus of the sidebar. The option appears when pressing the `⌘` Option key.
- 📌 Added [placeholders](#) for "hour" and "minute".
- ➕ Added [Insert Placeholder > Clipboard](#) placeholder to insert the current contents of the clipboard.
- ➕ [Smart rules](#) can now be installed via the [Support Assistant](#) and the [Extras](#) sidebar. Installable smart rules will become available in the near future.

- ① Added optional "to" parameter to the "deconsolidate record" AppleScript command, allowing you to specify the destination folder in the filesystem. This parameter is only supported by documents.
- ① **Sync** — [Sync stores](#) using an [encryption key](#) now display a small property icon next to their name in [Preferences > Sync](#).
- Renamed option "Keep groups on top when sorting on name" to *Keep groups on top when sorting* in [Preferences > General](#). This can be used with all sorting methods.
- Selected items in the [Navigate](#) sidebar can be renamed by clicking on them a second time.
- After creating a new group via the [Navigate](#) sidebar, any visible search is automatically closed.
- Files captured via [Tools > Capture](#) are captured to the current group when used in main windows. When used in document windows, they are created in the inbox of the current database.
- Added *Close Database* and *Database Properties* commands to the contextual and action menus for inboxes.
- The contextual menu command *New Smart Group* in the [Navigate](#) sidebar now creates a local smart group if the clicked item is a database or a group in a database.
- Renamed the command "Mark as Read" to *Mark All as Read* in the contextual menu of [Sidebar > Extras](#).
- Encrypted PDFs and databases now display a property icon in the [Navigate](#) sidebar and item list.
- Local smart groups, i.e., ones in a database, can now be dragged and dropped to the *Smart Rules* section of the [Navigate](#) sidebar to create a new smart rule.
- The default name for newly created tags is now "New Tag" instead of "New Group".
- Changed the displayed *Kind* of ordinary tags from "Group" to *Tag* in the [item list](#) columns and the [Info](#) inspector.
- The [Tags filter](#) pane now displays an item count when displaying tags as a list.
- The ⌘ Command key can be used to move instead of replicate files between tag groups.
- The Sorter improves: *Copy Selection* which attempts to retrieve the URL of the web page and adds a full visibility option for the docked tab.
- The Sorter now remains visible when DEVONthink is hidden.
- The performance of [See Also & Classify](#) has been improved.
- Changed commands *Best Alternative* and *Text Alternative* to *Table View* and *Form View* in [See also p. 124ff View > Document Display](#) when a sheet is selected.
- The *First Record*, *Previous Record*, *Next Record*, and *Last Record* commands are now available when viewing a sheet in table view.
- Sheet table views support now the menu command *Go > Go to Record*, also available in the [See also p. 30ff Navigation](#) and [See also p. 31ff Editing](#) bars.
- The current record in sheets is retained when switching between form and table views.

- It is now possible to reorder the columns in the [Document > Annotations](#) and [Concordance > List](#) inspectors.
- Revised shortcuts of: [See also p. 121ff Tools > Rotate Left and Right](#), [Tools > Batch Processing](#), and [View > Document Display](#).
- Renamed the "Author" and "Info" columns of the [Document > Annotations](#) inspector to *Content*. In case of PDF documents the details, the contents, e.g., of text notes or the highlighted string, or the author are displayed. In all other cases the text and image content is shown.
- Annotations having details now display an icon in the [Document > Annotations](#) inspector.
- [Tools > Summarize Highlights](#) now includes details of PDF annotations.
- Improved the reliability of [Tools > Summarize Highlights](#).
- Reintroduced some macOS Sierra workarounds for PDF issues. However, upgrading to macOS High Sierra or higher is highly recommended.
- Pressing ⌘⌘ while text fields are active now deletes to beginning of the current line instead of triggering [Data > Move to Trash](#).
- Improved the performance of rendering Markdown documents.
- Increased default margins of editable text views, e.g., plain text, Markdown source, etc.
- Automatic Wiki linking in Markdown documents ignores now escaped brackets and parentheses.
- Improved tooltips and Accessibility support of [See also p. 20ff Editing](#) and [Navigation](#) bars.
- The maximum width of inspectors has been increased to half of the window width.
- Expanded smart groups show their contents sorted by name when the [List view](#) is set to *Unsorted*.
- Unread items in [Sidebar > Extras](#) are now shown in bold.
- Worked around an issue where dropping a file from DEVONthink with a URL into a composing window of Apple Mail would only yield a link instead of attaching the file.
- Improved converting HTML emails to RTF, e.g., when using the alternate email view.
- Slight improvements made for displaying longer filenames.
- Improved AppleScript support.
- Improved the reliability of the [web server](#).
- Improved localization, performance, and reliability.
- ✓ Fixed a crash when accessing the [View](#) menu while using the [Import](#) sidebar.
- ✓ Fixed a rare freeze when updating indexed files.
- ✓ Fixed an issue where the [view/edit](#) pane wasn't restored after closing and reopening a main window or quitting and relaunching the application.
- ✓ Fixed an issue where the *Replace* buttons in the [Search](#) inspector were not disabled when viewing files where a replacement could not occur, e.g., PDF or rendered Markdown files.

- ✓ Fixed issues with the [Sorter](#): better Firefox support, improved drag and drop, and setting the focusing of the note field in [Take Note](#).
- ✓ Fixed an issue where *Find* and *Replace* in the [Search](#) inspector didn't always work correctly when viewing Markdown or HTML documents using side-by-side display.
- ✓ Fixed an issue where a newly created group in the [Global Inbox](#) wasn't selected in sidebar if the *Inboxes* group was collapsed.
- ✓ Fixed an issue where the [inspectors](#) lost keyboard focus after database changes, e.g., renaming via the [Info](#) inspector.
- ✓ Fixed an issue where background operations, e.g., thumbnailing, could reset changes made in fields in the [Inspectors](#).
- ✓ Fixed an issue where the [Path bar](#) wasn't visible anymore after resetting the [Tags filter](#).
- ✓ Fixed an issue where the URL of automatic Wiki links in Markdown documents were displayed in the wrong color while using dark mode.
- ✓ Fixed issues where automatic Wiki linking based on "Names and Aliases" didn't work when beginning with a word with only one character, ending with a non-alphanumeric character, or using extended Greek script.
- ✓ Fixed issues with OCR: an error with auto-rotation, OCR always created the output in the [Global Inbox](#), and issues when creating metadata after text recognition.
- ✓ Fixed an issue where rebuilding databases didn't update newer metadata items, like number of annotations or attachments, encryption state of PDFs, or the detected language.
- ✓ Fixed an issue where the buttons to add and remove users in [Preferences > Server](#) were not immediately disabled after starting or stopping the server.
- ✓ Fixed an issue where you could create users with no name in [Preferences > Server](#).
- ✓ Fixed an issue where capturing of websites in Markdown format would produce HTML markup instead.
- ✓ Fixed an issue where the document display mode of Markdown files wasn't preserved in some cases.
- ✓ Fixed an issue where the group selector was displayed more than once with incoming scans.
- ✓ Fixed an issue when inserting back links in plain text and Markdown documents in the [Annotations & Reminders](#) inspector.
- ✓ Fixed an issue where the *Go To* and *Insert Link To* popovers could cause DEVONthink to freeze.
- ✓ Fixed an issue where the document name in an item link wasn't displayed.
- ✓ Fixed an issue when selecting the [thumbnail](#) of the first or last page of PDF documents with varying page sizes didn't always work as expected.
- ✓ Fixed an issue where the [See also p. 20ff](#) Tags bar would lose focus when navigating to the previous or next document.
- ✓ Fixed issues with search, including: the search scope and negated operations not working correctly, *Fuzzy* and *Ignore diacritics* weren't working correctly, and if *Live/Prefix while typing* was disabled, the search was still performed automatically.

- ✓ Fixed an issue where search results were not always updated after deleting items or emptying the trash.
- ✓ Fixed an issue where search hits from PDF annotations were displayed multiple times.
- ✓ Fixed an issue when duplicating or moving items indexed from an unmounted volume to another database.
- ✓ Fixed an issue where tags entered in the [Info](#) inspector were only updated after pressing ↵ Return, or if no other info was changed.
- ✓ Fixed an issue where it wasn't possible to immediately rename a newly created group or feed in the sidebar.
- ✓ Fixed various cosmetic issues and visual artifacts.
- ✓ **Sync** — Fixed a rare crash with Bonjour syncing before sleeping or before quitting the application.
- ✗ Removed Vietnamese from the languages supported for OCR.

## VERSION 3.0 BETA 2

With the helpful input from our intrepid testers, this release brings a wealth of changes, fixes, and additions. While we can't summarize all the changes, here are the highlights: Some interface changes to the *Navigate* sidebar and *List* view bring back some of the old *View > as Three Pane* feel. We've added option to enable and disable live searching while you type. You can now switch between a cloud and list view in the *Tags* filter pane. Importing and exporting of smart groups and smart rules is now possible. We have updated or added placeholders, smart rule actions, and AppleScript commands for even more extensive automation possibilities. Annotation-free copies of PDFs can be created with a single menu command.

We have addressed several issues with the Sorter and OCR when used with ScanSnap scanners, and made many modifications to polish the user interface. We have fixed many minor issues and a few crashes. And we worked on performance and stability, with more to come in future builds.

- ➕ Added a [View > Show Only Documents](#) command to display only files, not groups or smart groups, to mimic the old *View > as Three Pane* feel. This can be used in *List* and *Icon* views.
- ➕ Added *Live while typing* to the options of the [toolbar search field](#), allowing you to disable and enable searching while you type.
- ➕ Added an *Inherit Tags of Groups* option to [File > Database Properties](#), allowing tags applied to a group to be applied to its children.
- ➕ Added a *View* submenu to contextual menu of the [Tags](#) filter pane, allowing you to switch between *Cloud* (default) and *List* view. The font size of the list view honors the [Preferences > General > Sidebar Text Size](#) setting.

- ⓪ Added a [Data > Convert > to PDF without Annotations](#) command to create a PDF with all annotations and links removed. This is also available to use in the contextual menu, smart rules, and AppleScript.
- ⓪ Added a menu containing *Copy* and *Clear* commands to the *Color* options of the [Info](#) inspector and popup, visible when tags are selected.
- ⓪ Adding an option in [Preferences > Imprinter](#) to duplicate the document before imprinting it.
- ⓪ Added *Copy Smart Group Link* and *Copy Smart Rule Link* commands to the contextual and action menus of the [Navigate](#) sidebar.
- ⓪ Added the ability to import and export smart groups and smart rules. Importing via drag and drop or double-clicking in the Finder is also supported.
- ⓪ Added [smart rule actions](#) *Duplicate and Continue* and *Convert and Continue*, allowing subsequent actions to be applied to the newly generated files.
- ⓪ Added [smart rule action](#) *On Import > On Clipping* used with clipping web pages via menu commands, the Sorter, DEVONagent, bookmarklets, and AppleScript. The smart rule action *On Creation > Via Sorter* is now only used when taking notes or screen captures created in the Sorter.
- ⊕ Added a [new smart rule script](#) *Download Bibliographic Metadata*. This script attempts to retrieve the digital object identifier (DOI) of the document and set the title and metadata, e.g., Journal, ISSN, and Authors, of the file.
- ⊕ Added an updated "Import from Pinboard" script to the [Support Assistant](#).
- ⊕ Added new AppleScript properties and placeholders for "digital object identifier", "newest document date", "oldest document date" and "document dates".
- ⊕ Added AppleScript property "annotation" to records to easily change and retrieve an annotation record.
- ⓪ Added new AppleScript command "download JSON from".
- ⓪ Added hidden preferences "CounterDigits" and "BatesNumberDigits" to specify the number of digits used for these placeholders (default is 6).
- Improved Asian language support.
- Improved the responsiveness of the web server.
- Improved Accessibility.
- Improved dark mode support.
- Updated several icons, especially for Retina displays.
- The default location for creating new databases now defaults to ~/Databases.
- Double-clicking databases in the [Navigate](#) sidebar expands them one level and collapses them. .
- Double-clicking groups in the [Navigate](#) sidebar opens them in new window if [Preferences > General > Double-click opens groups in a new window](#) is enabled.
- The [Navigate](#) sidebar now displays the indexed item icon.



- After adding a new workspace, the menu item [Go > Workspace > Update](#) updates the last added workspace, not the last used one.
- Flagged groups and feeds containing only unflagged items now display a mixed state icon.
- The title of document windows no longer lists the database name to allow for additional information or long filenames. Command-clicking the title will show the file's location and database.
- Reduced the minimum window height to accommodate smaller screens.
- Selecting the search field, choosing [Edit > Find > In Database](#), or pressing `⌘⇧F` switches the toolbar to icons-and-text mode if it's currently in text-only mode.
- The [Search](#) inspector tries to avoid redundant summaries when search terms are close to each other.
- Opening files in search results in new tabs or windows now retains and displays the search hits.
- The search summaries of XML, property list, and JSON files are now based on lines instead of sentences.
- Toggling [Tools > Inspectors > Show](#) now remembers the last used inspector.
- The [Info](#) inspector and popup now supports changing the icon of multiple selected files.
- The internal annotation template uses now the author defined in [Preferences > Editing](#).
- The [Insert Backlink](#) command in the [Annotations](#) section of the [Annotations & Reminders](#) inspector now inserts timestamps and pages in the case of media files or PDFs.
- [Tools > Summarize Highlights](#) uses the name of the item for the summary in case of a single selection. In addition, in case of items located in multiple databases the summary is now created in the global inbox.
- The [Tools > PDF Document > Reverse Page Order](#) command no longer requires the [Thumbnails](#) inspector to be visible. The command is therefore now also available in contextual menus of PDF views.
- Added or revised shortcuts for: [Tools > Batch Processing](#), [Tools > Rotate Left/Right](#), [Tools > Filters](#), and [View > Document Display](#).
- Improved capturing of the URL from browsers after drag and drop or using services, including improved support for Firefox.
- Taking notes in the [Sorter](#) now supports using formatting selected text, e.g., bold or italics, with rich text and formatted notes.
- Items created by [Sorter](#) now have the current geolocation set on them.
- The default clipping format of [Clip to DEVONthink](#) is bookmark.
- Improved support for the links of third-party URL schemes like OmniFocus.
- Improved support for EPUB and Markdown files in the [Content > Table of Contents](#) inspector.
- Improved performance when accessing the Contacts app.
- Improved consistency of [View > Document Display > Side-by-Side](#).
- Links can now be dragged into a formatted note from the address bar of Safari.

- Clicking WikiLinks in plain text and Markdown documents now create documents of the same type if the linked document doesn't already exist.
- Improved performance when WikiLinking using names and aliases.
- Improved internal Markdown stylesheet.
- After changing the plain text font in [Preferences > Editing](#), all plain text views are now immediately updated.
- [Preferences > Editing > Width](#) is now a popup supporting more options.
- The options set in [Preferences > Import > Tags](#) are now honored by: email archiving, scanning and OCR, importing from Bookends, Evernote, Notes, Yojimbo, files created via the Sorter and the web interface.
- Improved defining custom metadata, e.g., properly detecting cross-links.
- In custom metadata and sheets, the Decimal Number data type now supports up to six decimal places.
- Date columns in sheets now recognize more date formats, e.g., 2019-03-09 or Dec.25,2019, when entering data.
- Sorting date metadata is no longer string-based and more accurate.
- Single-line text custom metadata containing predefined values now display as a dropdown menu in *List* views.
- Combo boxes in form views and the [Info](#) inspector no longer remember partial strings when using autocompletion.
- Improved support for IPTC ObjectName metadata.
- Updated template [Search > PubMed](#) so it sets the URL of each document to the URL of the original article.
- Smart rules and reminders now support sending emails to multiple, comma-separated recipients.
- Improved the reliability of "Document Date" and "Amount" placeholders and script properties by restricting its action to the first four pages of PDF documents.
- The "Newest Document Date" and "Oldest Document Date" can now be used in smart rule and batch processing actions to change the creation or modification dates.
- The AppleScript command "search" now searches all open databases when the option "in" parameter isn't specified.
- The hidden preference "DisableFinderTags" now disables also setting or importing Finder tags when importing, indexing, or exporting files.
- The name of the registered edition is also displayed in *About DEVONthink* panels.
- Improved overall reliability.
- **Sync** — The default location for importing databases now defaults to `~/Databases`.
- **Sync** — Improved syncing of indexed items.
- ✓ Fixed a crash when smart rules opened documents externally.

- ✓ Fixed a crash when using *View > Cover Flow* when searching.
- ✓ Fixed a crash after entering the license code and receiving an incorrect response from our license server.
- ✓ Fixed an issue where deleting databases located on volumes mounted by DEVONthink could fail.
- ✓ Fixed an issue where moving items indexed from local cloud-synced folders, e.g., Dropbox could cause files to be deleted when DEVONthink's and the cloud services synchronizations conflicted.
- ✓ Fixed an issue where splitting documents in indexed groups weren't deconsolidated to the Finder automatically.
- ✓ Fixed an issue where items added to indexed folders in the Finder didn't trigger smart rules correctly.
- ✓ Fixed an issue with Asian languages that could cause duplicate entries for indexed items containing Asian characters.
- ✓ Fixed an issue where databases in *Favorites* couldn't be removed.
- ✓ Fixed an issue where tags could not be moved to the root of the *Tags* group for a database.
- ✓ Fixed an issue with the *Navigate* sidebar not retaining its last scroll position.
- ✓ Fixed an issue where the path bar wasn't updated after renaming groups or feeds.
- ✓ Fixed an issue where *Go > Go to Group* didn't match smart groups.
- ✓ Fixed an issue where the *View > Show Details* item was always enabled after switching from *View > Columns* to another view.
- ✓ Fixed an issue where the *Go > Previous* and *Next Document* command didn't automatically focus the document in the view and edit pane.
- ✓ Fixed an issue where the *First* and *Last Page* items of the navigation bar were always disabled.
- ✓ Fixed an issue where restoring workspaces set the focus to the search field.
- ✓ Fixed an issue with NOT searches, e.g., *Name matches NOT word*, ignoring the search scope.
- ✓ Fixed an issue where searching with the tilde (i.e., contains) being used with certain search prefixes.
- ✓ Fixed an issue where words beginning or ending with + or - were not highlighted or summarized.
- ✓ Fixed an issue where the metadata in the *Info* inspector was sometimes lost when multiple files were selected.
- ✓ Fixed an issue where changing tags in the *Info* inspector and popup then immediately changing marks afterwards didn't save the tags.
- ✓ Fixed an issue where removing a reminder wasn't synchronized.
- ✓ Fixed an issue when calculating the next due date on a weekly reminder.
- ✓ Fixed an issue where non-recurring reminders didn't trigger smart rules.
- ✓ Fixed an issue where removing annotation files in the *Annotations & Reminders* inspector didn't remove the related URL created in version 2.

- ✓ Fixed an issue where the cloud view of the *Concordance* inspector didn't retain the selection and map after changes to the database were made.
- ✓ Fixed several issues with the OCR plugin, including: not retaining custom metadata, not initiating with ScanSnap Home, automatic page rotation clipping the result, not reporting errors with password-protected PDFs, and visual artifacts in dark mode.
- ✓ Fixed various issues with the scanning interface, including correcting the creator of PDF documents and the sidebar not always updating.
- ✓ Fixed an issue where a QuickLook panel didn't update when the selection changed in *Sidebar > Import > Email*.
- ✓ Fixed an issue where *File > Import > UNIX Mailbox* didn't work correctly.
- ✓ Fixed an issue creating custom meta data attributes by duplicating existing ones.
- ✓ Fixed an issue where data in Decimal Number data was sometimes converted to integers.
- ✓ Fixed an issue where rebuilding a database didn't add geolocation data.
- ✓ Fixed various *Sorter* issues, including: layout issues, window expanding too far, not closing after web clipping, not returning groups that were excluded from classification, and some filename issues.
- ✓ Fixed an issue where the *Reveal* toolbar item revealed the incorrect item.
- ✓ Fixed an issue where the internal Markdown stylesheet wasn't always used.
- ✓ Fixed an issue with the paragraph alignment of converted EPUB files or their *Text Alternative* view.
- ✓ Fixed an issue where editing text documents always generated a thumbnail.
- ✓ Fixed issues with the scroll positions of Markdown preview not being preserved.
- ✓ Fixed an issue where the background color of movies set in *Preferences > Media* wasn't used.
- ✓ Fixed an issue where the URL of locked bookmarks could be edited.
- ✓ Fixed an issue where removing common tags from multiple selected files would remove the unique tags as well.
- ✓ Fixed an issue with automatic WikiLinking and files with the file extension displayed created by version 2.
- ✓ Fixed an issue where the *Add Tag* command wasn't available in the contextual menu of PDFs in document windows.
- ✓ Fixed an issue with *Tools > Summarize Highlights* and underlined or struck through text in PDFs.
- ✓ Fixed an issue where results added from [DEVONagent](#) didn't always honor the options set in *Preferences > Import > Tags*.
- ✓ Fixed an issue with context menus and bookmarks in the web interface.
- ✓ Fixed an issue where smart rules could be triggered by different event triggers, e.g., *On Download* and *On Upload*, etc.
- ✓ Fixed an issue with the *Convert* action of in the smart rule editor.
- ✓ Fixed an issue where the item counts of local smart groups weren't always updated.

- ✓ Fixed an issue where smart group and smart rule criteria like "URL is..." with no specified search string didn't work.
- ✓ Fixed an issue where the "add custom meta data ... for ... to" AppleScript command didn't work correctly.
- ✓ Fixed issues with some *Support Assistant* scripts being incompatible with version 3.
- ✓ Fixed an issue where the *Support Assistant* didn't display the correct edition.
- ✓ Fixed an issue when switching between macOS' light and dark mode.
- ✓ Fixed an issue where removing a license didn't free the seat.
- ✓ Fixed an issue where licensing the Standard or Pro edition didn't remove the *Server* preference and the web server was left running.
- ✓ Fixed an issue where entering a license for a different edition right after removing a license without closing the *License* panel didn't work.
- ✓ Fixed various visual artifacts.
- ✓ **Sync** — Fixed an issue downloading large pending documents via Bonjour.

## VERSION 3.0 BETA 1

This long-awaited release debuts many exciting new features, like a new integrated user interface, custom metadata, reminders, and new automation options that are even accessible to non-programmers. We've extended the capabilities of our already powerful search engine with search prefixes, like *tags:* and *name=*, to allow constructing more focused searches. Working with annotations and navigating PDFs is now easier and more efficient. Imprinting PDFs and images with custom data, including Bates numbering, is now possible. In addition to the wealth of new features, DEVONthink has maintained and improved the core technologies you've relied on in previous versions.

- ⊕ Three new editions: DEVONthink, DEVONthink Pro, and DEVONthink Server. All editions support automation, multiple databases, and all file types.
- ⊕ Added a new integrated user interface, utilizing panes versus independent windows for many functions.
- ⊕ Added support for the dark mode color scheme in macOS Mojave.
- ⊕ Added search prefixes, e.g., *tags:* or *name=*, to allow for more focused searches. These are also used in scripting.
- ⊕ Added custom metadata to support situation-specific needs. Multiple data types are supported, e.g., sets, Booleans, and numbers.
- ⊕ Added a new 64-bit OCR engine supporting multi-core processing, Asian language support, and output to multiple formats.
- ⊕ Added encrypted databases for maximum privacy.

- ① The Sorter has been redesigned and supports: searching open databases, multiple note taking options, including audio, video, and integrated screen captures, and includes the *Clip to DEVONthink* function.
- ① The *Clip to DEVONthink* browser extension for Safari is now a native extension.
- ① Added smart rules and batch processing to execute event-driven actions on files, on a schedule or on demand.
- ① Added new, easy to use data placeholders for use in templates, imprints, and smart rules, and batch processing.
- ① Added the ability to create custom imprints, including placeholder text and Bates numbering, for use with images and PDF files.
- ① Added *Tools > Summarize Highlights* to create a new RTF file containing the highlighted text from selected PDF and RTF files.
- ① Added *Go > To Group*, *Data > Move To...*, and *Edit > Insert Item Link* commands. These allow quicker access to open, reorganize, or link to items in your databases.
- + Sheets now support specific data types (number, date, etc.) and have a new form view.
- + Added *Tools > Create Metadata Overview* to easily assemble metadata for selected files in a sheet that can be shared or exported.
- + Added side-by-side view for editing HTML and Markdown documents.
- ① Added support for barcode detection.
- ① Added more options to convert metadata to tags, e.g., hashtags or geolocation data.
- ① Added a new web sharing interface and web server, utilizing secure connections via https: and allowing creation of users with per-database permissions.
- ① Added support for geolocation data, including the ability to enter it manually.
- ① Added ratings, 0 to 5 stars.
- ① Added Filter panes for filtering the displayed files by tags, dates and marks (label color, locked state, etc.), or geolocation data.
- ① Added the Formatting Bar, shown under the toolbar, for use with rich text documents.
- + Added the Editing bar, displayed over the view/edit pane, for quicker editing with file type-specific tools.
- + Added the Info Inspector, showing general information and custom metadata about selected files.
- + Added the Annotations and Reminders Inspector, allowing you to set reminders, view Finder Comments, and create, view, and edit Annotation files. Reminders can be one-time or scheduled, and they support several alarm options, including executing scripts.
- ① Added the Content Inspector displaying: the table of contents found in some Markdown, EPUB, and PDF files, or the thumbnails for PDF files.
- ① Added the Document Inspector displaying: indexed metadata, added annotations (highlights, text, etc.) and detected links in PDF, RTF, and web-based files, e.g., web archives.

- 📌 Added the Concordance Inspector giving you access to a word frequency list. It also has a new Cloud view, showing a word cloud with sizes based on word weight.
- 📌 Added the See Also and Classify Inspector, displaying suggested filing locations for or documents related to the selected file.
- 📌 Added the Search Inspector providing in-document search and replace and a list of search results, allowing for viewing the context of the search term and easy navigation through the document.
- 📌 Added automatic image tagging using machine learning technologies.
- 📌 Added the Reading List sidebar to gather items you want to read or return to at a later time, e.g., to easily access bookmarks, PDF pages, or specific points in video or audio.
- 📌 Added the Extras sidebar providing access to up to date scripts, templates, tips and tricks, and news from us.
- 📌 Added an Activity pane for a less intrusive display of certain processes.
- Improved EPUB support with reading, search, and conversion to other formats, e.g., rich text or PDF.
- Improved indexing and searching, including better support for Asian languages and indexing PDF and RTF attachments.
- There is now tighter integration with the filesystem when using indexed files.
- Improved automatic WikiLinking, including support for the square bracket syntax, and active links in the rendered view of Markdown files.
- More precise highlighting of search hits when using proximity operators, e.g., NEAR or BEFORE.
- Favorites can now contain documents.
- Integrated search functions, including advanced criteria options, into the main window.
- Pro and Server: Integrated scanning and email archiving in the Import sidebar.
- Improved background processing of several functions, like email archiving, indexing, thumbnail generation, etc.
- Improved performance.
- 📌 **Sync** — Added the ability to import encrypted databases.
- **Sync** — Improved overall reliability.
- **Sync** — Progress in the Activity window or pane now shows item names or counts, not internal filenames.
- ✅ **Sync** — Fixed a rare crash when a sync location wasn't reachable.

## VERSION 2.11.3 ... 1.0.1

Skipped.

**VERSION 1.0**

Initial release.



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# APPENDIX

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In the appendices you will find additional information that helps you getting familiar with DEVONthink, such as a glossary of commonly used terms, a listing of the Boolean operators used in searches, commonly found contextual menu items, and much more.

## GLOSSARY

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

### 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 *Escape* key (usually labeled with "esc").
- → The *Tab* key.
- ↵ The *Return* key.

### INTERFACE ELEMENTS

- **Bars:** Smaller sections of a window providing specialized information or controls, e.g., the [Information Bar](#) found just above the item listing. It shows information about the selection as well as buttons to sort or change the view.
- **Contextual menu:** The menu that appears when you right-click (or Control-click) something. The contextual menu gives you access to frequently used commands that deal directly with the clicked object. Specific contextual menu items are discussed in their respective sections, but there is a list of commonly seen commands in the [Contextual Menu Items](#) section of this appendix.
- **Inspectors:** Specialized panes at the right of a main window, providing information about the current selection as well as functions like [See Also & Classify](#).
- **Item list:** The list of items in the current location, viewable as a list, icons, columns, or Cover Flow. Items can be [documents](#), [groups](#), or [smart groups](#).
- **Sidebar:** The panes found at the left side of a main window, comprised of the *Navigate*, *Reading List*, *Import*, and *Extras* panes.

- **View/Edit pane:** A pane of the DEVONthink [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. 60ff](#)
- **View:** The layout for a DEVONthink [main window](#). You can change the layout using the commands found in the [View](#) menu.
- **Window:** DEVONthink 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](#) can be opened for individual documents.

## DOCUMENTS & GROUPS

- **Database:** A collection of all documents stored in DEVONthink. 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](#).
- **Duplicate:** A copy of a file, either explicitly created or detected by DEVONthink's AI.
- **Group:** A collection of documents or other groups inside the database. Similar in appearance and behavior to a folder in the Finder. [See also p. 116ff](#)
- **Global Inbox:** A special database serving as a destination for incoming data. The *Global Inbox* is always opened when DEVONthink is started and accessible through the [sidebar](#). The *Global Inbox* can be set as the default destination in [Preferences > Import](#).
- **Inbox:** A special group for data coming in to a database. Every database has an *Inbox* group.
- **News feed:** Also referred to as *RSS*, a news feed is like a web page, but split into multiple articles. 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 stores feeds in a database and displays them like a group. The 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, DEVONthink tries to add it as a proper feed document if possible.
- **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.
- **Sheet:** A collection of records or structured sets of data, presented in a spreadsheet style, similar to data viewed in Apple Numbers or Microsoft Excel. Alternatively, the data can be displayed in form view, similar to browsing records in, e.g., FileMaker.

- **Smart group:** A special type of group with a set of search criteria saved with it. This is similar to "Saved Search" folders in the Finder. Every time you visit this smart group, DEVONthink runs the attached search and displays it as the content of the group. DEVONthink creates a number of pre-defined smart groups when you create a new database.
- **Trash:** A temporary location in a database for deleted files. Similar to the Trash in the Finder, all trashed items are stored until you explicitly delete them using [DEVONthink > Empty Trash](#).

## TAGS

- **Group tag:** Groups within a database that apply their name as tags to their contents. Items moved out of these groups will not retain the group tags. Group tags appear grey in all tag lists.
- **Ordinary tag:** Tags created through the *Tag* bar or other means are created in a special top-level [Tags](#) group. They are called "ordinary tags" and appear blue in all tag lists.

See the [Iconology](#) section for icons specific to these two items.

## 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

deleted (groups, documents) or modified (documents).

- **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.
- **UUID:** Each database, group, or document in DEVONthink receives a unique identifier (UUID) when it's created. This is a read-only alphanumeric string that refers only to the particular item. The UUID allows you to reference an item regardless if its location or name changes, and is usually found in [item links](#).

See the [Iconology](#) section for icons specific to the *flagged*, *locked*, or *unread* states.

## SYNCHRONIZATION

- **Sync location:** Sync locations are used to keep your databases on all your devices in sync. They summarize all information about which databases to sync through what kind of connection (e.g., direct connections to DEVONthink on a Mac, WebDAV, CloudMe, Dropbox etc.) and with which sync store.
- **Bonjour (Direct connection):** A sync method for syncing one device to another Mac or mobile device running [DEVONthink](#) or [DEVONthink To Go](#), respectively. Unlike other sync methods, there is no intermediary storage location for the sync data. It is direct - device to device.
- **Sync store:** A sync store is a special folder containing sync data. These can be direct, local, e.g., on your Mac or a thumb drive, or remote, as used with cloud services.



- **Encryption key:** A user-defined word used to "scramble" or "unscramble" your sync data when syncing. When used, your sync data is stored in an encrypted state in the sync store.
- **Local database:** A database that exists and is open on this device.
- **Remote database:** A database that is not open on this device, or exists at the sync location, e.g., on Dropbox, but has not been downloaded to this device.
- **Pending document:** A document for which only the metadata is locally available. This happens when you choose not to synchronize indexed files for the sync location.
- **WebDAV:** A type of web server used by some cloud services, some network attached storage devices, or running locally. It can usually be used by DEVONthink for syncing.

## 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 or annotation attached, is encrypted, e.g., PDFs or encrypted databases, or has a triggered script attached. 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 encryption applied, e.g., encrypted PDFs, and encrypted database, or an encryption key has been specified for a sync location in [Preferences > Sync](#).
- Item is unread.

- 🚩 Item has been [flagged](#).
- 📄 Item is [indexed, not imported](#).
- 🔒 Item is [locked](#).
- 💬 Item has a [comment](#).
- 📌 Item has an [annotation](#).
- 🔔 Item has a [reminder](#) set.
- 📄 Item has a [script](#) attached.
- 🏷️ Group is a [tag](#), too.
- 📎 Item has an attachment (email messages only).
- 🔄 Item is synced but its content is not (yet) downloaded.
- 📄 Item is a duplicate
- 📄 Item has one or more replicant(s)
- 📄 Item is a duplicate, but also has one or more replicant(s)

## TOOLBAR ITEMS

DEVONthink provides a wide variety of toolbar items, giving you quick "push-button" access to many everyday tools.

### DEFAULT ITEMS

The following toolbar buttons are available in the default set you see when you first launch DEVONthink:

- 📄 **Sidebar:** Show and hide the global sidebar.
- 📄 **Preview: None:** Hides the document preview.
- 📄 **Preview: Standard:** Shows the document preview below the item listing.
- 📄 **Preview: Widescreen:** Shows the document preview besides the item listing.
- \* **Actions:** Contains the contextual menu for items selected in the item listing.
- + **New:** Adds documents in DEVONthink-native formats. Similar to [Data > New](#).

- 📄 **Open:** Opens the current item in a DEVONthink window if possible.
- 📄 **Open externally:** Open the current document in the system default application.
- 📄 **Share:** Opens the macOS Share menu for the selected items. This does not apply to groups.
- 🚩 **Mark: Flagged:** Changes the flagged state of the selected item.
- 📖 **Mark: Read:** Changes the read status of the selected item.
- 🔒 **Mark: Locked:** Changes the locked state of the selected item.
- 🏷️ **Label:** Changes the label color of the selected item.
 

**Search:** This is the main search bar, accessing all or specific groups and databases.
- 🔄 **Synchronize:** Initiates a manual sync of the current database. [See also p. 146ff](#)
- 📄 **Get Info:** Opens a popup from the button displaying a number of commonly used inspectors.
- 📄 **Show/Hide Inspectors:** Shows or hides the *Inspector* panes.
- 📄 **Show/Hide Tags:** Shows or hides the *Tags* bar under a document's preview.

**Note:** The items for showing or hiding the document preview as well as for marking items flagged, read, or locked are also available as a combined toolbar item.

## ADDITIONAL ITEMS

In addition to the default set, there are many other specific buttons available, shown in the essential order found in [View > Customize Toolbar](#):

- 📄 **Scripts:** Provides access to the contents of the [Scripts](#) menu.
- 📄 **Quick Look:** Opens a Quick Look preview for the selected document.
- 🔍 **Zoom In:** Zooms into the current item.
- 🔍 **Actual Size:** Zooms the current item to the default zoom level.
- 🔍 **Zoom Out:** Zooms out of the current item.
- 📄 **Zoom to Fit:** Sets the magnification of the current item to fit the bounds of the view/edit pane.
- 📄 **Zoom to Width:** Sets the magnification of the current item to the width of the view/edit pane.
- 📄 **Full Screen:** Displays the current document in DEVONthink's full screen mode.
- 📄 **Groups: Group:** Creates a new group in the current location.
- 📄 **Groups: Smart Group:** Creates a new smart group in the current location.
- 📄 **Group:** Groups the selected items into a new group.
- 📄 **Ungroup:** Ungroups the selected group and deletes the now-deserted empty group.
- 📄 **Classify:** Attempts to classify the current item.
- 📄 **Plain Text:** Creates a plain text file in the current location.
- 📄 **Rich Text:** Creates a rich text file in the current location.
- 📄 **Markdown Text:** Creates a Markdown file in the current location.
- 📄 **Formatted Note:** Creates a formatted note in the current location.
- 📄 **Sheet:** Creates a sheet in the current location.
- 📄 **Bookmark:** Create sa bookmark in the current location.

- 🔗 **Launch URL:** Opens a URL associated with the current item in the system default browser.
- 💾 **Save:** Explicitly save changes to a document.
- 🗑️ **Delete:** Moves the current item to the database's trash.
- 🖨️ **Print:** Prints the selected document. If a document cannot be printed, the item listing will be printed.
- 📁 **Import:** Imports files into the current location.
- 📤 **Export:** Provides access to the contents of the [File > Export](#) menu.
- 🔄 **Update:** Manually updates indexed items in a database.
- 📁 **Show in Finder:** Reveals a file in its location in the Finder.
- 🔍 **Reveal:** Reveals a file in smart groups or search results in its current location.
- 📄 **Merge:** Merges multiple files into one, leaving the originals intact.
- 📄 **Merge and Delete:** Merge multiple files into one, putting the originals in the database's trash.
- 🔧 **Backup & Optimize:** Does an internal optimization and backup of a database's metadata.
- 🔧 **Verify & Repair:** Checks the integrity of the database and repairs items it can.
- 📄 **ScanSnap:** Scans a document with an attached Fujitsu ScanSnap scanner and imports the scan.
- ✉️ **Send by Email:** Creates a new message in your default email app and attaches selected items.
- 🔄 **Synchronize All:** Initiates a manual sync of all open and actively syncing databases.
- 📝 **Take Note:** Opens the *Take Note* view, either in the *Sorter* or a *Take Note* panel.

- 🔗 **Imprinter:** Provides access to any imprints available in the [Tools > Imprinter](#) menu.
- 🔗 **OCR:** Runs OCR on a compatible file, e.g., PDFs or images, producing the selected output type.

Note:

**Reveal:** Be cautious with this button. When used on imported files, it will reveal them in the internals of the database. You do not want to modify these internal files in the Finder. This option is best used on indexed files.

**Verify & Repair:** Please refer to the [troubleshooting](#) chapter for information on database maintenance and repairs.

**Send by Email:** The ability to add the attachments depends on the inter-application capabilities of the email application. If it doesn't provide support for this, you may be able to drag documents into draft messages or the email application's dock icon.

Some items are also available as a compound toolbar icon.

## CUSTOM ITEMS

If you are [creating scripts](#) and saving them to the `~/Library/Application Scripts/com.devon-technologies.think3/Toolbar` folder, these will be shown in the *Customize Toolbar* options as individual buttons with a script icon.

## KEYBOARD SHORTCUTS

Keyboard shortcuts make using DEVONthink much more efficient. Some of the following shortcuts are common to most Mac applications; others are only available in DEVONthink. 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 > Shortcuts > App Shortcuts*.

## WINDOWS

- **Tab:** Cycles focus between the item list, search field, and Tags bar (if visible).
- **Control-Tab:** Cycles between the item list, view/edit pane, and Tags bar (if visible).
- **Escape:** Cancels processes, closes dialogs or Quick Look previews, etc., depending on the context.
- **Command-}**: Cycles to the next tab.
- **Command-{**: Cycles to the previous tab.

Note: Hold **⇧** to cycle in reverse order.

## DOCUMENT LISTS

Navigating items:

- **Up/Down arrow:** Navigates up and down in all views. Use **⇧** to select multiple entries.
- **Left/Right arrow:** Expands or collapses the selected groups in horizontal split, vertical split or List views, or navigates to previous/next item in other views.

- **Option-click (the triangle in front of a group):** Expands or collapses all groups that are contained within this group as well.
- **Option-Left/Right arrow:** Expands or collapses the selected groups and all their children the item list.

Selecting items:

- **Shift-click:** Selects consecutive items.
- **Shift-arrow:** Extends the next consecutive item to the current selection.
- **Command-click:** Adds a non-consecutive item to the selection.

Manipulating items:

- **Return:** Renames documents.
- **Backspace:** Deletes selected items.
- **Command-Drag:** When dragging items from the Finder, this moves, not copies, the file into the database.
- **Option-drag:** Duplicates 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 with **⌘⌘** pressed indexes the item. Dragging items into documents with **⌘⌘** held inserts a link to the item.

Item List:

- **Command-Shift-O:** Opens a selected document in the system default application.
- **Tab:** Jumps to the first or next editable column when using *View > List*.
- **Space:** Opens the standard Quick Look panel showing a preview of the selected items.

- **Option-Space:** Opens a full screen Quick Look slideshow.
- **Option-bracket:** Using [ and ], goes backwards and forwards through the visited locations.

## 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-drag:** Inserts a cross-link for groups or documents dropped into a rich text document. Dragging files or folders from the Finder to a rich text document with  $\text{⌘}⌥$  pressed creates links to them.
- **Command-Shift-click:** Opens a link in a new tab and activates it. This requires enabling tabbed browsing in [Preferences > General](#).
- **Option-bracket:** Using [ and ], goes backwards and forwards through the documents or visited web pages .
- **Option-drag:** Selects text using a rectangular selection ribbon.
- **Option-click (a link):** For HTML-based files, adds the clicked URL to the [Download Manager](#) panel.
- **Option-click (a word):** Initiates a search with the clicked word as the search term.
- **Shift-arrow:** Expands or contracts the current text selection.

## 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.

## CONTEXTUAL MENU ITEMS

DEVONthink also provides many commands in contextual menu items, shown when you Control-click on elements in the application. Many of the contextual menu items are also found in DEVONthink's menus. Below is a list of common menu items you'll find in the contextual menus for documents and windows.

## DOCUMENT CONTENTS

When you Control-click in the contents of documents, you will see a contextual menu with commands and options. The items shown are related to the file type and if you're interacting with a selection in the document.

Specific items, e.g., commands relating only to PDFs, are covered in their respective sections.

In editable documents:

- **Add to Favorites:** Adds the current document to the Favorites.
- **Add to Reading List:** Adds the current document to the Reading List.
- **Services:** Displays the macOS Services menu.

Text or links in text:

- **Add Link to Reading List:** Adds a link to the *Reading List*.
- **Add Link:** Allows you to enter a URL for the selected text, converting the text to an active link.
- **Add tag [word]:** Tags the document with the selected word (only available if the word is not already a tag of the document).
- **Copy Link:** Copies a clicked link to the clipboard (only available for selected links).
- **Edit Link:** Edits the destination of a selected link. Selecting this option allows you to remove the link as well.
- **Insert Link To:** Inserts a link to an item you select in the submenu (only available when no text is selected).
- **Insert Placeholder:** Inserts a predefined [placeholder](#) or one specified as custom metadata in [Preferences > Data](#).
- **Highlight:** Highlights the selection with the current highlight color. Using this command on a selection again removes the highlighting.
- **Link To:** Makes the selected piece of text a cross-link and links it directly to the group or document you select in the submenu.

- **Look Up [word]:** Looks the selected text up in macOS's Dictionary.
- **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 [Preferences](#).
- **Open Link in Browser:** Opens the selected link in the default browser or application.
- **Open Link in DEVONagent:** Opens the selected link in a [DEVONagent Pro](#) browser window.
- **Open Link in New Tab:** Opens the selected link in a new tab in DEVONthink.
- **Open Link in PhotoStickies:** Opens a link in [PhotoStickies](#).
- **Open Link:** Opens the selected link.
- **Remove Link:** Use this to remove the link status of selected text.
- **Search with Google:** Searches for the selected text in Google.
- **Search [word]/Selected Phrase:** Searches for the selected word or phrase in your open databases.
- **See Related Text:** Displayed like search results, this shows a list of documents related to the selected text passage. This option is only available when more than one word is selected.
- **See [word]:** Opens a drawer with documents related to the selected word.

- **Set Name As:** Sets the name of the document to the selected piece of text (needs to be less than 256 characters).
- **Share:** Shares selected text via the available sharing extensions.
- **Add Link to Downloads:** Adds a link to the [Download Manager](#).

Images and PDF documents:

- **Actual Size:** Displays the document at its actual size. Uses also the resolution information contained in the file.
- **All Pixels:** Zooms the image so that one image pixel equals one pixel on the screen.
- **Zoom In/Out:** Zooms in or out of the document, or displays it in its actual size.
- **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 to fit the width of the view/edit pane or the document window.

## ITEM LIST

These contextual menu items are commonly shown when you ⌘-click items in a main window's item lists. In items lists, the commands are also often available in the [Actions](#) toolbar button. Some of these commands are also seen in the [See Also & Classify](#) Inspector pane.

- **Add To:** Commands in this submenu add the currently selected documents to your *Favorites* or the *Reading List*.
- **Apply Rules:** Runs a chosen smart rule on the selected item.
- **Convert:** This submenu displays options for converting from one file type to another.

The options shown here are dependent on the type of file selected.

- **Copy Item Link:** Copies a link to the current item.
- **Copy URL:** Copies the URL of the selected document to the clipboard. This only appears when one document is selected.
- **Duplicate To:** Duplicates the selected item to the group you select from the submenu.
- **Get Info:** Opens a popup containing more detailed information about the currently selected file or group.
- **Group Items:** Groups multiple selected items in an item list.
- **Label:** Changes the label of the selected item.
- **Launch URL:** Opens the URL in the selected item's URL field. Hold the ⌘ Option key to choose *Launch URL in Background*. This keeps DEVONthink in the foreground.
- **Mark:** Changes the flagged, locked, or read status of the selected item.
- **Move Into Database:** Moves an indexed item into the database. Use this command with caution as it moves the file from its current location into the internals of your database. It does not copy the file.
- **Move To External Folder:** Moves a non-indexed item, e.g., imported or created in DEVONthink, out to an indexed folder in the Finder.
- **Move To:** Moves the selected item to the group you select from the submenu.
- **Move to Trash:** Moves the clicked item to the Trash. Hold the ⌘ Option key to show *Move All Instances to Trash* when used in items lists.
- **New:** This submenu allows you to quickly create several built-in file types. See the

[Data menu](#) for more information on these file types.

- **New from Template:** This submenu allows you to create new documents from any of the installed templates.
- **Open:** Opens the selected item in a separate [main window](#) or [document window](#).
- **Open in Tabs:** Hold the `⌘` Option key and *Open* changes to *Open in Tabs*. This opens the selected item in a new tab.
- **Open With:** Opens the selected item in an external application.
- **Rating:** Allows you to set a rating, from no stars to five stars.
- **Replicate To:** Replicates the selected item to the group you select from the submenu.
- **Reveal:** Shows and selects the selected item in its location in DEVONthink.
- **Send by Email:** Sends the selected item by email.
- **Show in Finder:** Shows the selected item in the Finder.

- **Tags:** This submenu offers special commands for automatically adding some kinds of tags. See the [Data](#) menu for more information.
- **Thumbnails:** This submenu allows you to *Create*, *Update*, or *Remove* the thumbnail for a file.
- **Ungroup Items:** Ungroups a group, leaving its contents behind. The group is not preserved.
- **Imprinter:** Choose an imprint you've defined in [Preferences > Imprinter](#) to apply it to the current image or PDF.
- **OCR:** Choose the output file type and convert a compatible file via OCR.

Note:

**Send by Email:** The ability to add the attachments depends on the inter-application capabilities of the email application. If it doesn't provide support for this, you may be able to drag files into draft message or the email application's dock icon.

## SEARCH OPERATORS

Searching in DEVONthink already is a powerful function. The addition of Boolean operators, parentheses, and wildcards extend the power to fine-tune your search even further.

Note: 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 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 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 of words term1, in exactly this form

Besides the classic Boolean operators, DEVONthink 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 is required, term2 is optional. If term2 is also found, 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**: term1 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:** !, -

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.

## WHITE SPACE HANDLING

Words linked by non-white separators (e.g., `page-index` 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".

## TEMPLATES

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

Templates are stored in the `~/Library/Application Support/DEVONthink 3/Templates.noindex` folder. In order to manage your templates, rename them, organize them in subfolders, or delete them, you can quickly access this folder by selecting *Data > New from Template > Open Templates Folders*. More templates are available by selecting *Data > New from Template > More Templates*, or as extras in the [Support Assistant](#) or in the [Extras sidebar](#).

A very useful thing you can do is add your own files to this folder, even if the files aren't directly editable in DEVONthink. For example, you may have a specific Pages template you often use. Open the template in Pages and save it into DEVONthink's Templates folder. Now you can add documents to your database even more efficiently.

### BUILT-IN TEMPLATES

DEVONthink comes with the following built-in templates, which serve as great examples of the template feature.

General Use:

- **Note:** Adds a new note. If the clipboard contains text, it is automatically inserted.
- **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 contact card; and adds this information to the "About this project" document.
- **Task List:** Adds a simple task list.

Accounts & Passwords:

- **Online Account:** Adds a document for storing online account details.
- **Serial Number:** Adds a document for storing serial numbers.

#### Bibliography:

- **Articles:** Adds a sheet for keeping track of articles.
- **Booklets:** Adds a sheet for keeping track of booklets.
- **Books:** Adds a sheet for keeping track of books.
- **Manuals:** Adds a sheet for keeping track of manuals.
- **Proceedings:** Adds a sheet for keeping track of proceedings.
- **Technical Reports:** Adds a sheet for keeping track of technical reports.
- **Theses:** Adds a sheet for keeping track of theses.

#### 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.

#### Contacts & Events:

- **Business Card:** Adds the card selected in Contacts as a rich text document to your database.
- **Calendar Event:** Adds a Calendar 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 Calendar does not yet provide a mechanism to retrieve the selected event.

#### 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.

#### 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:** Add a smart group selecting documents larger than 5 MB.
- **PDF (not searchable):** Add a smart group selecting all PDF documents that don't contain machine-readable text.

Tabs:

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

**Toolbar:** By default this contains no templates. Add your own templates to `~/Library/Application Support/DEVONthink 3/Templates.noindex/Toolbar`. These can be added to the DEVONthink windows using [View > Customize Toolbar](#).

Note: Some of the included templates are just simple files. Others are smart templates, packages that contain assets and scripts that provide powerful template generation. See the [Automation](#) chapter for more information on them.

## METADATA

DEVONthink 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:

## FILE METADATA

General Metadata:

- Title
- Headline
- Subject
- Creator
- Producer

PDF Metadata:

- Author
- Title
- Subject

- URL
- Keywords

RTF Metadata:

- Author
- Title
- Comment
- Subject
- URL
- Keywords
- Organization
- Copyright

Email Metadata:

- Authors
- Author email addresses
- Recipients
- Recipient email addresses
- Email addresses

Media and Publication Metadata:

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

## CUSTOM METADATA

Another powerful feature of DEVONthink is custom metadata fields. Specified in the [Preferences > Data](#), you can define fields that are meaningful to you, your company, your research group, or even your family!

When you create a custom metadata field, you give it a name. DEVONthink uses this name to create an identifier for use

in [automated processes](#). This identifier is created automatically and cannot be changed.

**Data Types:** When you define a custom field, you choose a data type for it. So what's a "data type"? It's simply a kind of a value; like "a" is a character and "42" is a (the!) number. The following data types are supported, including any interface items associated with them, e.g., checkboxes or dropdown menus:

- **Boolean:** This is a true or false value. Displayed as a checkbox.
- **Countries:** A dropdown menu providing a list of country names.
- **Languages:** A dropdown menu providing a list of languages.
- **Integer:** A whole number, e.g., with no fractional part, like 17.
- **Decimal Number:** A fractional number, represented with a decimal point.
- **Date:** Can be specified as *Date & Time* or *Date*.
- **Identifier:** Any alphanumeric value, specified as needed, e.g., a customer or patient number.
- **Single-line Text:** A dropdown providing a list of terms you defined for the field in the Data preferences. You can also type in a new value.
- **Multi-line Text:** Enter a small paragraph of text. Line breaks can be typed by pressing Option-Return.
- **Rich Text:** Same as Multi-line text but supports basic formatting, e.g., bold or italic text.
- **Set:** Similar to the *Single-line text*, this shows a dropdown with values pre-defined for the field in the Data preferences.

However, new values can't be entered outside the preferences.

- **URL:** Accepts any valid URL, including filesystem URLs.
- **Link:** A special dropdown that allows you to choose an item in your databases. a link for the chosen item is used.

*Note: The [Countries](#) and [Languages](#) lists are lengthy, but not necessarily exhaustive. For [Multi-line Text](#) and [Rich Text](#), only one line will be displayed in its column in the item list.*

**Predefined Custom Metadata:** In [Preferences > Data](#), we have provided some custom metadata fields to get you started. These are ready to use and explore and serve as great examples of the data types discussed above:

- Date
- Company
- Author
- Abstract
- Status
- Serial Number
- ISSN/ISBN
- Digital Object Identifier (DOI)
- PubMed ID
- PMC ID
- Barcode
- Format
- Category
- Subcategory
- Genre
- Country
- Language
- Price
- Tax
- Tip
- Decimal

## PLACEHOLDERS

One of the most powerful features of DEVONthink is the ability to insert data dynamically. A placeholder is a bit of code DEVONthink interprets when used in these scenarios, replacing it with a specific value. You may have an imprint with a *Name* placeholder defined in the title. When the imprint is used on a PDF, the placeholder is converted to the name of the file!

To extend the possibilities even further, you can combine static text and multiple placeholders to achieve truly custom results. You can use these in [smart rules](#), and [imprints](#), and in templates for creating [WikiLinks](#) documents.

Below is a list of placeholders currently available:

- **Name:** The name or title of the file.
- **Proposed Name:** The name proposed by DEVONthink's AI.
- **Aliases:** Any aliases applied to the file.
- **Finder Comment:** Any Finder comments applied to the file.
- **File Name:** The filename in the file system.
- **File Extension:** The extension of the file.
- **URL:** The URL in the Info pane.
- **Location:** The location in the database; e.g., `/Inbox/Research`.
- **Tags:** Tags applied to the file.
- **Digital Object Identifier:** The unique digital object identifier of the file, if available.
- **Index:** This is a number that increments based on the number of items being processed by a smart rule.
- **Counter:** Similar to the *Index*, this is a zero-padded incrementing number.

- **Amount:** This is an amount detected in scanned documents, like receipts or invoices.
- **Bates Number:** Inserts a [Bates number](#).
- **Page Count:** The total number of pages in the document.
- **Group Name:** The name of the group containing the document, e.g., `/001/a/b/myfile.txt` would report `b` as the group name.
- **Top Group Name:** The name of the top level group in the root of the database, e.g., `/001/a/b/myfile.txt` would report `001` as the top group name.
- **Database Name:** The name of the database containing the document.
- **Database Path:** The filesystem path of the database.
- **Attachments:** The number of attachments in a file.
- **Language:** An abbreviation of language detected in the document's indexed contents.
- **Country:** The country in the geolocation data for a file.
- **Postal Code:** The postal code derived from the geolocation data for a file.
- **Administrative Area:** This is state, province, or region in the geolocation data for a file.
- **Locality:** The city in the geolocation data for a file.
- **Tab:** A tab character.
- **Line Break:** A line break (return) character for multi-line text.
- **Current Date:** Today's date.
- **Addition Date:** The date the file added to the database.

- **Creation Date:** The date the file was created.
- **Modification Date:** The date the document was last modified.
- **Document Date:** This is a date detected in the document's contents, e.g., in a receipt. For PDFs only the first four pages are used.
- **Newest/Oldest Document Date:** The newest or oldest date detected in the document. For PDFs, only the first four pages are used.

When using dates, you can choose the format as defined in *System Preferences > Language & Region > Advanced > Dates*. The default is the medium format, but you may choose short or long formats as well. You can also choose specific parts of the date or time, e.g., the month, year, or hour only.

- **Clipboard:** Inserts content currently on the clipboard. It can be inserted as rich text, plain text, or a link, depending on the type of data and the file the data is inserted into.
- **Predefined Author:** This is the *Author* specified in DEVONthink's [Preferences > Editing](#).
- **Username:** The shortname of the current macOS account.
- **Full Username:** The longname of the current macOS account.
- **Organization:** This is the company name, if defined by the (Me) contact card in macOS Contacts.
- **Email Address:** The primary email address, as defined by the (Me) contact card in macOS Contacts.
- **Host:** The hostname of the machine.



**Properties:** These are potential metadata properties found in the current file. A more extensive listing of these can be found in the [Metadata](#) section.

**Custom Metadata:** This menu lists any [custom metadata fields](#) applied to the file.

## SMART RULE EVENTS AND ACTIONS

Smart rules in DEVONthink provide many powerful actions and events that can trigger these actions. Below is a list of the available options for both.

### EVENTS

When an action is triggered is almost as important as the action itself. Actions can be triggered when any of these events occur:

- **On Demand:** Run only when *Apply Rule* is selected in a contextual menu or [Tools > Apply Rules](#).
- **On Startup:** Runs when DEVONthink launches.
- **On Synchronization:** Runs when DEVONthink synchronizes to any sync location.
- **On Quit:** Runs when DEVONthink quits.
- **Hourly/Daily/Weekly:** Runs on an hourly, daily, or weekly schedule.
- **On Workdays:** Runs on Monday through Fridays.
- **On Weekends:** Runs on Saturday or Sunday.
- **On Creation:** Runs when a new document is created in the specified location. To trigger actions when taking notes or screen captures with the *Sorter*, choose *Via Sorter*.
- **On Save:** Runs when any matching document is saved.
- **On Import:** Runs when documents are added to the specified location.
- **On Clipping:** Runs when documents are added via clipping, e.g., via menu commands, the *Sorter*, [DEVONagent](#), bookmarklets, or AppleScript.
- **On Download:** Runs when items are downloaded via DEVONthink's [Download Manager](#).
- **On Scan:** Runs after a scanning operation has completed.
- **On OCR:** Runs after an OCR operation has completed.
- **On News:** Runs when an RSS feed refreshes and receives new articles.
- **On Upload:** Runs when an item is uploaded through DEVONthink's web server.
- **On Open:** Runs when a matching item is opened in a new document window or viewed in a main window.
- **On Open Externally:** Runs when a matching file is opened in an external application.
- **On Launch URL:** Runs when the URL associated with the item is launched.
- **On Reminder:** Runs when an alarm set on a matching item's Reminder comes due.
- **On Moving:** Runs when matched items are moved to the specified location.
- **On Classifying:** Runs when matching items are classified by DEVONthink.

- **On Moving into Database:** Runs when indexed items are moved into the database, becoming imported items.
- **On Moving to External Folder:** Runs when imported or created items in a database are moved to external locations, becoming indexed items.

## ACTIONS

The power in smart rules is the actions. DEVONthink provides actions that cover simple tasks, e.g., prefixing a filename, all the way to ultra-powerful AppleScript injection via external or embedded scripts. Since you can chain multiple actions together, the possibilities are nearly endless. Here's a list of available actions:

- **Bounce Dock Icon:** Causes DEVONthink's dock icon to bounce. This will only trigger when DEVONthink isn't the active application.
- **Display Notification:** Shows a message via the Mac's Notification Center. Notifications need to be enabled in *System Preferences > Notifications for Display Notification* to operate correctly.
- **Display Alert:** Shows a message in an alert window.
- **Speak Text:** Using your computer's voice synthesis, it will speak the message you specify.
- **Play Sound:** Plays a selected system alert sound.
- **Send Mail:** Enter email addresses to send the matching items. This can be a comma-delimited list of addresses, names, or enter the name of a group you've defined in your contacts.
- **Add to Reading List:** Add the matched items to the Reading List.
- **Open Externally:** Open the matched file in the system default application.
- **Launch URL:** Open the URL associated shown in the *Info Inspector & URL*.
- **Execute Script:** Execute *External* or *Embedded* scripts. Embedded scripts are created in a popup menu and only available to the smart rule they are created in. [See also p. 171ff](#)
- **Change Name/Aliases/Comment/Label/Rating:** Change the specific attribute of the matched file. For items with an existing attribute, e.g., a comment, a placeholder will preserve the existing value.
- **Mark:** Toggle the state of read/unread, flagged/unflagged, and locked/unlocked. Note you change more than one of these attributes with one action, but you can chain more than one *Mark* action in the smart rule.
- **Change Creation/Modification Date:** Change the creation or modification date of matched files to: current, addition, creation, modification, or the document date.
- **Add Tags:** Add tags to the matched files. As you type, tags from all open databases will be suggested. Press the *comma* key to commit the tag.
- **Remove Tags:** Removes specific tags you enter.

- **Move/Replicate/Duplicate:** Move, replicate, or duplicate a matched file to a chosen location.
- **Duplicate & Continue:** Duplicates matched files and applies subsequent actions to the copies.
- **File:** Allows you to file items into a group. Specify subgroups using a forward slash, e.g., 2019/DEVONtech would create or file into the DEVONtech subgroup of a 2019 group in the current group. You can use placeholders to define the location.
- **Classify:** Using our AI, this will attempt to move any matched files to an apropos location. Failures to classify files are noted in the [Log window](#).
- **Convert:** Attempts to convert files into plain/rich text, formatted notes, Markdown, HTML, web archive, or PDF.
- **Convert & Continue:** Converts files and applies subsequent actions to the copies.
- **Imprint:** Apply the selected imprint to any matching files, if possible.
- **OCR:** This will perform OCR on a file, if possible. For the smart rule, the output format selected will override the option set in [Preferences > OCR > Convert incoming scans to](#).
- **Custom Metadata:** If you have specified [custom metadata fields](#), you will have options to change values with an action. For example, if you had a Boolean field named "Done", you could have the action set this field to true when the action is triggered.
- **Move to Trash:** Move the item to the database's trash. The items are not

removed from the database until the trash is emptied.

- **Delete:** Be very cautious with this option. Delete truly deletes a file. It is not sent to the database's trash. It is not sent to the Finder's trash. It is completely deleted.

## SEARCH PREFIXES

DEVONthink supports a wide variety of searchable attributes. These include common attributes, like names or tags, but also include document or DEVONthink-specific items, like word counts or [custom metadata](#) you've defined.

Similar to searching with Spotlight or some other applications, the use of search prefixes is supported. These take the form of a *prefix* and a *prefix operator*, e.g., `name :`, followed by the search term. These prefixes are automatically applied when you choose criteria in an advanced search but they can also be manually entered in the search field.

## SEARCH PREFIXES

Below is a list of the available search field prefixes as you would manually type into the search field or a script:

- **text:** Text contents in a file.
- **metadata:** The metadata for a file.
- **name:** The name of a file. This is distinct from the *filename* and does not include the file extension.
- **url:** The associated URL.
- **comment:** Spotlight Comments.

- **docAuthors:** The name of the sender of an email.
- **docAuthorEmailAddresses:** The email address of the sender of an email.
- **docRecipients:** The name of a recipient of an email.
- **docRecipientEmailAddresses:** The email address of a recipient of an email.
- **docTitle:** The title of a file. The title may be distinct from its name, e.g., a song title for an MP3 file.
- **docComment:** The RTF-specific comments for a file.
- **docHeadline:** A headline applied to some files. Rare.
- **docSubject:** The subject line from an email.
- **docDescription:** The description found on some files, typically images.
- **docKeywords:** The PDF or RTF specific keywords for a file.
- **docOrganization:** The company specified in imported links or vCards from the Contacts application.
- **docCopyright:** Copyright information in the metadata of a file.
- **docAlbum:** The album information from media metadata, e.g., MP3 files.
- **docComposer:** The composer information from media metadata, e.g., MP3 files.
- **docCreator:** The process or application used to create a file.
- **docProducer:** The producer of a file, usually applied to media files.
- **aliases:** Aliases applied to a file.
- **tags:** Tags applied to a file.
- **label:** The color label of a file, from 0 (no label) through 7.
- **rating:** The star rating of a file, from 0 (unrated) through 5.
- **width:** The width of a document in points, i.e., the width multiplied by 72.
- **height:** The height of a document in points, i.e., the height multiplied by 72.
- **length:** The number of pages in a file or length of a media file in seconds.
- **size:** The size of a file in bytes, KB, MB, or GB, e.g., `size >= 50 MB`.
- **wordcount:** The number of words in the contents of a file.
- **hits:** The number of times a file has been viewed or opened.
- **filename:** The name of the file in the file system, including the file extension.
- **extension:** The extension of a file, e.g., `txt`.
- **kind:** Supports `any`, `group`, `smartgroup`, `tag`, `ordinarytag`, `grouptag`, `text`, `rtf`, `formattednote`, `markdown`, `html`, `webarchive`, `xmlfile`, `propertylist`, `image`, `pdf`, `quicktime`, `video`, `audio`, `bookmark`, `feed`, `news`, `script`, `sheet`, `email`, and `other`.
- **additionDate:** The date the file was added to the database.
- **creationDate:** The date the file was created.
- **modificationDate:** The date the file was last modified.
- **openingDate:** The date the file was last opened.
- **dueDate:** The due date set in a Reminder for a file.
- **md\_attachments:** The number of resources added to an RTFD file.
- **md\_language:** An abbreviation of the detected language in the contents of a file. For a list of values, select a language in the criteria and note the abbreviation to use.

- **md\_country:** An abbreviation of the country in the geolocation data for a file. For a list of values, select a country in the criteria and note the abbreviation to use.
- **md\_zipcode:** The postal code detected in the geolocation data for a file.
- **md\_area:** The state, province, or region detected in the geolocation data for a file.
- **md\_locality:** The city detected in the geolocation data for a file.

**Item prefixes:** These special prefixes are for state-based queries, like the locked or indexed state of items. They all follow the form of `item:<specified state>`, e.g., `item:locked`.

- **Flag:** The flag state of a file. Supports `flagged` or `unflagged`.
- **Unread:** The unread state of a file. Supports `read` or `unread`.
- **Locking:** The locking state of a file. Supports `locked` or `unlocked`.
- **Item:** A special item supporting instance states: `replicated`, `duplicated`, `indexed`, `pending`, or `tagged`.

There are also two special prefixes you can use:

- **scope:** This limits where you are searching. It supports `selection` (the current group or database), referring to a database by name (in quotes), and `inboxes`. If no scope is specified, the search applies to all open databases. When used, `scope:` should be the last parameter in the query.
- **any:** When used, this allows you to specify whether to return results matching any of the criteria. This can only be used when specifying more than one search prefix, e.g., tags and filename.

#### Example:

```
additionDate>=2019-03-10
scope:selection
tags:sync,methods scope:"Tech
Stuff"
any: name:test OR imprint {any:
tags:blue, red}
```

**Sub-criteria searches:** Yes, you may have noticed in the last example a tags search in curly braces. This creates sub-criteria for the search. This obviously extends the search options to allow creating even more complex forms.

## PREFIX OPERATORS

Many times prefixes end with a colon, e.g., `tags:` but some use other forms, depending on the available options in the criterion. For example, words can "begin with" some characters, but a size is greater or less than a value. If you select a criterion you would see what options apply. Use the keys below to map the option to its operator.

### Matches, Is, Is Not:

`:` is equal to the term *matches*. With string-based queries, it allows for wildcards to be used. It is also used for state-based queries, like *Kind*. The negated form, `:!`  is also supported.

`==` is equal to the term *is*. This must be an exact match of the search term. These can be used in strings and number-based queries. The negated form, `!=` is also supported.

#### Example:

```
Kind is Group → kind:group
Item is indexed → item:indexed
```

Item is not Replicated → `item:!replicated`  
Extension is XML Document → `extension==XML`  
Language is not English → `language!=en`

**String Matching:** These are operators that are used with string-based queries, like names or text content. These queries also support:

`:<` is equal to *begins with*.

`:>` is equal to *ends with*.

`:~` is equal to *contains*. (The tilde is the second key down on the top left of an English keyboard.)

**Example:**

Subject begins with party → `docSubject:<party`  
Locality ends with field → `md_locality:>field`  
Name contains tech → `name:~tech`

**Number Matching:** In addition to the `==` and `!=` operators, numbers can also use these operators:

`<` is equal to the term *is less than*.

`<=` is equal to the term *is less than or equal to*.

`>` is equal to the term *is greater than*.

`>=` is equal to the term *is greater than or equal to*.

**Example:**

Word Count is less than 1000 → `wordcount<1000`  
Size is greater than 10MB → `size>10 MB`  
Hits is greater than or equal to 1 → `hits>=1`

**Date Operators:** These are operators used with date-based queries, like the creation date of files.

`<` is equal to the term *before*.

`<=` is equal to the term *before or on*.

`>` is equal to the term *later*.

`>=` is equal to the term *later or on*.

`:#` is equal to the term *within last* number of days. The negated form, `!:#` is also supported.

`:` is equal to the term *is* for date-based queries. Supported date options are *Today*, *Yesterday*, *This Week*, *Last Week*, *This Month*, *Last Month*, *This Quarter*, *Last Quarter*, *This Year*, and *Last Year*. The negated form, `!:` is also supported.

**Example:**

Date Created is after January 31, 2019 → `creationDate>=2019-01-31`  
Date opened is not within last 5 days → `openingDate:#!5days`  
Date Due is not Today → `dueDate:!Today`

Date searching allows for some flexibility in formats. Time is not a required parameter, but can be specified. These searches are all equivalent:

**Example:**

`additionDate>10 march, 2019`  
`additionDate>March 10, 19`  
`additionDate>2019-03-10 08:30:00`  
`-0500`

## SCRIPTS

Below is a list of the DEVONthink supplied scripts, segregated by the menu items in the [Script](#) menu:

Comments:

- **Append Selected Text:** Adds the selected text to the comments of the current document.
- **Assemble:** Collects the comments of the selected documents and creates a new document listing them.
- **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.
- **Speak:** Speaks the comments of the selected documents.

Data:

- **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.

Download:

- **Linked Images of Page:** Adds linked images of a displayed web page to the database.
- **Images of Page:** Adds the images of a displayed web page to the database.

- **Links of Page:** Adds links contained on a displayed web page to the database.
- **Download as...:** Converts bookmarks to one of these formats: *Formatted Notes*, *HTML Pages*, *PDF Documents (One Page or Paginated)*, and *Web Archives*

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:

- **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 compressed backup (.Zip) of the current database in ~/Backup. All backups are include a datestamp in the filename for easy tracking and identification. These can be useful for copying to external media or uploading to a cloud service as a secondary backup strategy.

Feeds:

- **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 Main:** Formats selected text as "Header Main".
- **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:** 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.

#### Import:

- **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.

- **Man Page:** Imports a UNIX manual page as a PDF document.
- **Perldoc:** Imports the documentation of Perl pages, modules, functions, or programs.

#### Reminders:

- **Add as Event to Calendar:** Adds a new event to Calendar linking back to the selected item in DEVONthink.
- **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 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](#).

Note: These are scripts for integrating with external applications. For scripting internal reminder scripts, see the [Reminder Scripts](#) section of the chapter about automation.

#### Rename:

- **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.
- **To Webpage Title:** Sets the titles of the selected documents to the names of the web pages pointed to by their URL fields.
- **To Subject:** Sets the titles of the selected documents to the subject lines of the email



messages if the selected documents are email messages.

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.

Tabs:

- **Open Bing:** Open a new tab for the Bing search engine.
- **Open Google:** Open a new tab for the Google search engine.
- **Open Location:** Open a new tab for a location you specify.

Note: The last script does no URL validation, though DEVONthink's dictionary makes it possible to script this too.

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.

**Caching:** All scripts in the *Scripts* menu are cached, meaning their properties are persistent until you quit and relaunch the application or DEVONthink automatically updates the menu, e.g., after adding or removing scripts.

## WEB SITE EXPORT TEMPLATES

For exporting selected groups or files as a web site, DEVONthink uses templates available in `~/Library/Application Support/DEVONthink 3/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 markup of HTML templates, the following placeholders can be used:

- %charset%
- %comment%
- %content%
- %databasePlusLocation%
- %modification%
- %stylesheet%
- %title%
- %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.

## HIDDEN PREFERENCES

There are a few settings in DEVONthink that you cannot set through the [Preferences](#) window. Most of them are intended to facilitate customer support but they might be interesting for you as well.

**Note:** These hidden preferences are not an official feature and could be changed or removed with any update.

### HOW TO ACCESS THE HIDDEN PREFERENCES

All hidden preferences are simple on/off switches. You set and unset them using the "defaults" command in the Terminal. To set preferences via the Terminal DEVONthink must not be running or it will overwrite your changes when you close it.

To set a preference using the Terminal, noting the commands are case-sensitive, they are written like this:

#### Terminal:

```
$ defaults write com.devon-technologies.think3  
ShouldScaleAttachedImages -bool TRUE
```

The above command activates the preference with the key "ShouldScaleAttachedImages". Change TRUE to FALSE to deactivate it. Use any of the preferences keys below to activate or deactivate them.

There is a special preference to allow DEVONthink to detect other plain text formats as plain text: "AdditionalPlainTextExtensions". As it replaces the list of additional plain text extensions we recommend that you read the current list first (empty by default) before adding your own to the end of the list.

#### Terminal:

```
$ defaults read com.devon-technologies.think3  
AdditionalPlainTextExtensions  
  
2014-07-31 08:25:27.101  
defaults[21950:3312262] The domain/  
default pair of (/Users/eb/Library/  
Preferences/com.devon-technologies.think3  
AdditionalPlainTextExtensions) does not  
exist  
  
# This "error" shows there are no  
additional formats specified.  
  
$ defaults write com.devon-technologies.think3  
AdditionalPlainTextExtensions -  
string .otl.todotxt  
  
$ defaults read com.devon-technologies.think3  
AdditionalPlainTextExtensions  
  
.otl.todotxt
```

### AVAILABLE HIDDEN PREFERENCES KEYS

- **AdditionalPlainTextExtensions:** Adds additional plain text extensions, separated by dots.
- **AdditionalXMLExtensions:** Adds additional XML file name extensions, separated by dots.
- **BatesNumberDigits:** Specifies the number of digits used for the placeholder.

- **CounterDigits:** Specifies the number of digits used for the placeholder.
- **DisableActivityWindow:** Disables automatically showing/hiding of the [Activity](#) window.
- **DisableAutomaticUpdatingOfIndexedItems:** Disables automatic updating of indexed items.
- **DisableBadgeLabel:** Disable the badge label on DEVONthink's Dock icon.
- **DisableFileSystemEvents:** DEVONthink no longer listens to file system events.
- **DisableFinderTags:** DEVONthink no longer imports or exports Finder tags.
- **EnableApplicationFiles:** Applications can be imported/indexed.
- **EnablePDFDrawing:** Enables DEVONthink's own drawing of PDF pages. This was a workaround for macOS Sierra and is incompatible to macOS High Sierra.
- **EnableThreadedFeeds:** Feeds are downloaded in threads instead of by a background task.
- **PlainTextIsMarkdown:** Treat all plain text files as markdown.
- **RichNotesWithoutAttachments:** Services create RTF instead of RTFD.
- **ShouldScaleAttachedImages:** Enables image scaling in RTF documents.
- **SyncDebugLog:** Enabled additional sync logging for debugging.

# 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, 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](#)

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 & 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](#)

## 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](#)

## 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 and services](#)