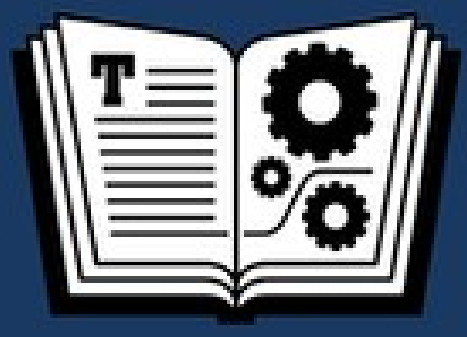


TAKE CONTROL OF

DEVONthink 3

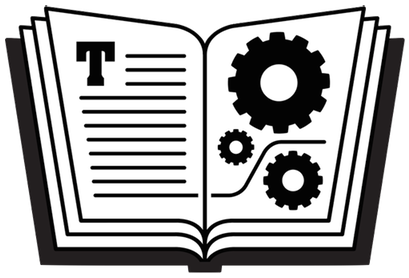
COVERS

DEVONthink for Mac
DEVONthink To Go for iOS

by JOE KISSELL

Take Control of DEVONthink 3 (1.3)

Joe Kissell



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Read Me First

Welcome to *Take Control of DEVONthink 3*, version 1.3, published in August 2020 by alt concepts inc. This book was written by Joe Kissell and edited by Kelly Turner.

This book teaches you the basics of DEVONthink version 3 on the Mac and DEVONthink To Go in iOS/iPadOS. You'll learn how to find your way around, get information into and out of DEVONthink, and take advantage of the program's most important features.

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Updates and More

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DEVONthink's Documentation

I refer throughout this book to DEVONthink's documentation. It's available within the app via Help > DEVONthink 3 Help; you can also download it in the form of a user handbook in PDF, EPUB, or Kindle (Mobipocket) ebook format from the DEVONthink Handbooks and Extras webpage.

What's New in Version 1.3

This third quarterly update of the book makes only extremely minor changes, mainly to cover small differences in DEVONthink 3.5.1 and 3.5.2. Changes include:

- Noted that you can rearrange items in the Reading List Sidebar by drag-and drop
- Added a comment about Full Disk Access in Use the Mail Plugin
- Added a note to Use a Fujitsu ScanSnap about the surprise release of a 64-bit version of ScanSnap Manager
- Updated Configure OCR Preferences to include the new Resolution setting
- Included a note in Create a WikiLink about MashedWords and double brackets
- In Edit HTML and Markdown Documents, noted additional languages now supported by Prism
- Added a comment about Bonjour syncing via a USB cable in Sync Locations

What Was New in Version 1.2

Version 1.2 was the second quarterly update of this book. It covered changes in DEVONthink 3.0.4 and 3.5, including the following:

- Updated and expanded discussion of the Sidebar, and especially the Navigate Sidebar, to include new preferences for unifying (or not) databases and inboxes, and shortcuts for switching among them)
- Added a sidebar, All About Favorites, discussing how you can add, access, and rename favorites
- Added another sidebar, The Mail Rule AppleScripts, explaining how DEVONthink AppleScripts can be included in Mail rules
- Included new OCR options, such as adding recognized text as comments or annotations, and support for Brother's iPrint & Scan software, in Configure OCR Preferences
- Added a tip about using Option-click to search in Perform a Simple Search
- Added a tip about exporting cloud views of concordances in Search Using the Concordance
- In Edit HTML and Markdown Documents, added information on DEVONthink's support for Prism (syntax highlighting) and MathJAX (equation rendering)

- Expanded Work with Smart Rules to include multiple triggers and the Scan Name and Scan Text actions
- Mentioned the new default guest user in Use DEVONthink's Web Server
- Added a tip on integrating DEVONthink with Hook in Link DEVONthink Documents to Other Apps
- Updated a number of screenshots to reflect subtle changes in the user interface

Introduction

Recently I was trying to explain DEVONthink to someone who had never used it. I started by saying it's an information management tool, but that's pretty vague. So I went on to say that it can hold, organize, and search files (like the Finder, only better); it can edit plain and rich text files (like TextEdit, only better); it can annotate PDFs (like Preview, only better); it can store and present photos, movies, music, and webpages (though, admittedly, not as well as Apple's Photos, Music, TV, and Safari apps); and that's just the barest beginning. As I went through this litany of features, I realized that DEVONthink can take the place of a huge number of apps—if I had to, I could do nearly all my work within DEVONthink. It's that powerful.

As a result, when it comes to writing about DEVONthink, I almost don't know where to begin. That's my problem as an author, and it may be your problem as a user, too. DEVONthink has a marvelously deep, rich set of features, and it can adapt itself to just about any set of needs or work preferences. But, this wealth of power is like a 50-page restaurant menu in which every dish sounds equally delicious. There are so many excellent choices that finding a clear strategy to make the most of the meal—or the software, as the case may be—can be a daunting prospect.

My goal in this book is to do just that: to help you wrap your brain around DEVONthink's extensive options and figure out how best to use it to accomplish your goals. Whether you are starting out with the app for the first time or are a seasoned user looking for ways to get more out of it, I hope to show you where to focus, what to try, and how to think about DEVONthink in the most effective way.

DEVONthink already has plenty of good documentation in the form of built-in help files (also available as a standalone ebook). The purpose of this book is neither to replace that information nor to explain the operation of every command and button. Instead, I concentrate on the key tasks you'll want to accomplish. After providing an overview of the app's main concepts and interface, I walk you through the principal activities you'll do over and over, such as getting information into DEVONthink; organizing, finding, and working with that information; using any of numerous techniques to automate DEVONthink; and, finally, getting your information back out by exporting or sharing it.

And if all that leaves you hungry for more, I also provide a bit of dessert—a chapter (Dig Deeper) that goes into some of the program's advanced capabilities, as well as Appendix A: Keyboard Shortcuts, which is sure to be helpful for power users.

Stepping Stones

I've peppered this book with a series of "Stepping Stones" sidebars like this one, which provide special advice for working through complex choices in DEVONthink. Think of them as guides to help you navigate both the book and the software more easily.

Note: DEVONthink 3 comes in standard, Pro, and Server editions (see DEVONthink Editions for details). When I write "DEVONthink," I'm referring to features in all three; where appropriate, I point out which features are present only in the Pro or Server edition.

Version 1.3 of this book is current as of DEVONthink 3.5.2. We plan to update this book approximately once per quarter to keep up with changes in DEVONthink. Even so, you may occasionally encounter something in the book that doesn't quite match with what you see on your screen. I don't expect these small inconsistencies to cause you any problems, but I do recommend reading the release notes for each update of DEVONthink you install for details on what's new. And be sure to access the blog included in the online Ebook Extras for this ebook from time to time to see if I've added any new information.

Tip: If there's anything you read here that you want to learn more about, please let me know; my contact information is in About the Author and Publisher. Although I can't guarantee I'll cover every reader request, I'll certainly take every one into consideration as I update the book.

DEVONthink Quick Start

This book helps you find your way around DEVONthink 3 and explains how to use its most important features effectively. For the most part, each chapter builds on the one before it, so I recommend reading the book sequentially. If you choose to jump around, please read at least the first two chapters—Understand DEVONthink Basics and Explore DEVONthink's Interface—which will help you understand the rest of the material.

Get your bearings:

- Acquaint yourself with DEVONthink's unique conventions and terminology; see Understand DEVONthink Basics.
- Learn your way around and find essential features; see Explore DEVONthink's Interface.
- Create one or more containers to hold your personal data; see Set Up DEVONthink Databases.

Put DEVONthink to work:

- Create new documents or import data from a variety of sources; see Get Information into DEVONthink.
- Group, label, and tag data; add any of numerous kinds of metadata; and use other organizational tools. See Organize Your Information.
- Use simple or advanced techniques to locate data you've previously stored in DEVONthink; see Find Your Information.
- Edit data in DEVONthink or an external editor, use OCR with scanned documents, add annotations and imprints, and convert document formats; see Work with Your Information.
- Let DEVONthink's automation features do more of the heavy lifting for you; see Automate DEVONthink.

Use DEVONthink with other devices and people:

- Keep multiple copies of DEVONthink in sync; see Sync DEVONthink Databases.
- Store and manage your DEVONthink data on any iOS/iPadOS device; see Use DEVONthink To Go.

- Share data locally or export it in numerous formats; see Get Information Out of DEVONthink.
- Use DEVONthink Server to share databases on the web; see Use DEVONthink's Web Server.

Go beyond the basics:

- Solve problems and learn about some advanced features; see Dig Deeper.
- Find a list of less obvious keyboard (and keyboard-plus-mouse) shortcuts; see Appendix A: Keyboard Shortcuts.
- Find resources for further exploration; see Learn More.

Understand DEVONthink Basics

DEVONthink isn't difficult to use, but because it offers unique ways of dealing with your data, it requires you to learn a few new concepts and terms, and understand some behaviors that may be unexpected at first.

Once you have a grip on the basic principles that underlie DEVONthink's operation, you'll find that its features and capabilities fall into place more readily. Meanwhile, even though DEVONthink is both powerful and versatile, it's not always the right tool for the job—so it's also important to understand What DEVONthink Is Not Good For.

What Exactly Is DEVONthink?

Because you're reading this book, I assume you already have a copy of DEVONthink, and that in turn implies that you have at least some idea what it is. But as I discovered when surveying a variety of DEVONthink users, different people think of the app in very different ways. There's no one right answer, but as you get to know DEVONthink, it may be helpful to understand what it is (and isn't), how it can function, and how it differs from comparable software.

Among the many hats DEVONthink can wear are the following:

- **File and media browser:** Like the Finder, DEVONthink can organize files in a hierarchical folder structure. And like Music and Photos, it can also store and play media such as music, photos, and videos (although its media capabilities are less advanced than those in Music and Photos). In addition, it stores *metadata,* extra pieces of information about each item (such as labels and modification date) in a special database, separate from the files themselves.

  Everything you put into DEVONthink is indexed for fast searching and sorting, and you can group and identify information in ways the Finder doesn't offer. All the original files are still available in their raw states on your disk, but from within DEVONthink you can see and use your data in much more flexible ways.

- **Snippet keeper:** In the course of a day, you may want to keep track of URLs, notes to yourself, screenshots, parts of webpages, and countless other bits of information that don't necessarily fit the mold of standalone files. Any app that provides a convenient way to capture and store such a wide variety of data can be called a *snippet keeper*. Apps such as EagleFiler, Evernote, MacJournal, Tinderbox, and Yojimbo—not to mention the Mac's built-in Notes app—fall into this category. DEVONthink, too, can function as an outstanding snippet keeper, thanks to its remarkable capability to manage miscellaneous data.

- **Note taker:** For people who spend a lot of time in classes or meetings, having a tool that simplifies taking and working with notes is helpful. With apps such as Curio, NoteTaker, Pear Note, and Microsoft OneNote, you can not only type notes (as you could in any word processor or snippet keeper) but also record audio, highlight and annotate text and PDFs, make outlines, and do similar sorts of note-taking tasks. DEVONthink, too, offers several ways to facilitate note-taking—including audio and video notes.

- **Database:** Database applications, such as FileMaker Pro, Panorama X, and 4D, are in some senses the opposite of free-form note-taking programs. By imposing a carefully designed structure on your data—whether it be a list of wine bottles in your basement, data on your company's customers (or patients or clients), or an online catalog of thousands of products—databases enable you to filter and find data with great precision and flexibility. DEVONthink, too, is a database of sorts, and although it doesn't have all the capabilities of standalone databases, it does let you slice and dice some kinds of information in much the same way.

- **Web and RSS reader:** There's no shortage of Mac web browsers (Safari, Firefox, Chrome, Opera, and others) and RSS readers (NetNewsWire, Reader, NewsFire, Vienna, etc.). DEVONthink may not have all the bells and whistles of a standalone web browser or RSS reader, but unlike the others, it lets you integrate URLs, webpages, news feeds, and other online content with the rest of your data in interesting ways, and, of course, it keeps all the content (and any associated metadata) indexed for fast searching.

- **Organizational tool:** Although DEVONthink doesn't try to be a mind-mapping program (like MindManager, MindNode, MindView, or TheBrain), it does have a number of capabilities that help you find and explore connections between pieces of data. For example, in addition to its support for labels, tags, and multiple pointers to documents, called *replicants* (see Words You Should Know, ahead), it uses artificial intelligence to classify new documents based on similar documents you've already sorted (discussed in Organizing Features, later in this chapter).

In fact, DEVONthink is all these and quite a bit more. It lets you easily create, store, organize, find, and retrieve almost any kind of data. You can view your data in whatever way suits you best, and customize almost everything about the program and individual databases to meet your needs. It won't replace the Finder for managing your files, and you may still need other specialized apps for dealing with certain kinds of data. But it's an outstanding multitasker that can substitute for many other tools you may otherwise need.

Examples of Cool Things People Use DEVONthink For

Just to stimulate your imagination a bit, here are some real-world examples of uses to which a variety of people put DEVONthink:

- **Writing books:** Authors—including yours truly—store research materials, outlines, schedules, webpages, correspondence, timelines, drafts, screenshots, and reviews (among other documents) in DEVONthink.
- **Managing a medical practice:** Physicians use DEVONthink to store research papers, seminar notes, patient records and correspondence, lab results, and searchable scans of official documents.
- **Practicing law:** Attorneys find DEVONthink a useful tool for managing the thousands of documents often required in legal cases—briefs, transcripts, case files, client information, templates of official forms, and the like.
- **Performing scientific research:** Scientists store journal articles, research papers, experimental data, webpages, brainstorming notes, text snippets, and other tools of the trade in DEVONthink.
- **Developing software:** Programmers and managers keep specifications, documentation, invoices, correspondence, and similar items in DEVONthink.
- **Studying religious texts:** Clergy, religious scholars, and laypeople alike find DEVONthink useful for holding and searching sacred texts, commentaries, sermons, and research notes.
- **Maintaining a paperless office:** People of all kinds find DEVONthink Pro Office a great tool for converting scanned documents to searchable text, and for managing bank statements, tax records, receipts, business cards, and other items that would otherwise take up space in a filing cabinet.
- **Recreation:** Users who are fond of such diverse hobbies as cooking, hill walking, martial arts, and role-playing games find DEVONthink the ideal repository for all their information (recipes, maps, notes, game playing tips, and much more).

DEVONthink Editions

In the days of DEVONthink 2, there were three editions of the app—DEVONthink Personal, DEVONthink Professional, and DEVONthink Pro Office—plus a lighter-weight variant called DEVONnote. Now there's just one app, but the available features vary based on which of three editions you've paid for and unlocked via online registration or an in-app purchase. Although the new editions don't map directly to the old ones, most users will find that they get more functionality for less money. You can find a list of differences on the DEVONthink Editions page; here's an overview of how they compare:

- **DEVONthink Standard:** The standard edition is the baseline. It packs a wide range of organizational features—including some capabilities previously found in the more-expensive DEVONthink Professional (such as multiple databases, RSS reading, sheets, support for a variety of file formats, and support for AppleScript).
- **DEVONthink Pro:** The midrange choice now has most of the features previously found in DEVONthink Pro Office, such as integrated support for numerous scanners, optical character recognition (OCR), and email archiving. It also includes imprinting for PDFs and images, a download manager, a concordance, custom metadata, and several other useful features.

- **DEVONthink Server:** The new high-end edition adds just one feature, previously found in DEVONthink Pro Office: a web interface that enables you to share your databases over the web; other people can then view and edit database contents using a web browser, which may be especially handy for teams using more than one platform within their office.

Thus, unless you specifically need the web interface, DEVONthink Pro is the sweet spot for most users, and what I recommend if you haven't yet made a purchase and are unsure what to buy. (DEVONnote, by the way, is entirely gone.)

The licensing model is also different now: a single license entitles you to two *seats*—that is, permission to use the app on two different Macs (regardless of who is using it on those two Macs). You can buy additional seats for any license at a reduced price.

Words You Should Know

DEVONthink uses certain terms in potentially unfamiliar ways. You'll have an easier time getting the hang of DEVONthink if you start with a good understanding of the following words:

- **Alias:** In DEVONthink, an *alias* is an alternative name for a document, which you can use to reference it elsewhere in DEVONthink—for example, when making WikiLinks (see Create a WikiLink). Compare with replicant, below.

- **Classify:** When DEVONthink *classifies* a document, it uses its artificial intelligence to decide which existing group a document best fits in, and then moves it into that group.

- **Database:** The container in which DEVONthink stores content is called a *database*. On disk, this database consists of numerous files—settings, templates, metadata files, and so on—plus folders containing your documents themselves (text files, graphics, PDFs, etc.). Ordinarily, you need not concern yourself with these details; think of the database as a single big storage area for all your DEVONthink data. (To learn more about databases, see Set Up DEVONthink Databases and especially the sidebar How and Where Databases Are Stored.)

- **Document:** Any file you create with, or import into, DEVONthink is called a *document*—that includes not only text files but also graphics, audio, webpages, and many other kinds of data. It also includes smaller "snippets" of data (such as URLs, notes, and sheets—described just ahead), even though you wouldn't normally interact with them in the Finder as standalone files.

- **Duplicate:** When DEVONthink contains two or more identical copies of a given document, each copy is known as a *duplicate*. (Later, in Duplicate and Replicate Documents, I discuss why you might want identical copies.) Although that's what most people would assume the word means, I mention it here to distinguish it from the much

different concept of a *replicant*, which I describe in a moment. (Read the sidebar Identifying Unread, Duplicate, and Replicant Documents to learn how to spot a duplicate.)

If you duplicate a document within DEVONthink, or if you import the same document into a DEVONthink database more than once, then ipso facto, DEVONthink considers each copy a duplicate. In some cases, DEVONthink's artificial intelligence may also consider two ostensibly different documents—such as a single file you scanned on two different occasions—to be duplicates. But you can't count on this, nor can you control DEVONthink's threshold of similarity for what it counts as a duplicate.

In general, if you later change anything about a duplicate besides its name or other metadata (including PDF annotations), it is no longer considered a duplicate. However, I know of no way to force DEVONthink to recognize two documents as duplicates if it hasn't already determined that they are.

- **Group:** When you see the word *group* in DEVONthink, think "folder." Within DEVONthink, you can use groups to organize documents just as you can with folders in the Finder. Groups look like folders, and can be nested within each other. The only real difference is that a group in DEVONthink doesn't necessarily correspond to an actual folder in the Finder; it's a construct you see only within DEVONthink. DEVONthink also uses "group" as a verb to mean "create a new group containing the selected items."

- **Inbox:** DEVONthink offers many ways to collect information from other places—dragging in files, using plugins to import messages from Mail or webpages from browsers, and so on. Depending on your settings and preferences, such items may need a temporary holding place until you decide how to group, tag, or classify them. That holding place is a special group called the *inbox*. Your inbox shows you all the items you've added to DEVONthink but not yet explicitly put somewhere else. In fact, you can have multiple inboxes—one for each database plus a global Inbox—as I explain further in Inboxes.

- **Preview:** The *preview* is an alternative name for the view/edit pane, the portion of a window that shows a single document and, in many cases, permits you to edit it too. Although you can see an entire, fully formatted document in a preview, you can also double-click any document to open it in its own window (or in the default external app for that document type, depending on whether "Double-click opens documents externally" is selected in DEVONthink 3 > Preferences > General).

- **Replicant:** In contrast to duplicates, which are complete copies of other documents in a DEVONthink database, *replicants* are additional pointers to an existing document. Replicants let you store the same document in multiple groups without taking up additional space.

You may think that sounds like aliases in the Finder, but unlike aliases (and like Unix hard links, for those of you who are familiar with such things), replicants are indistinguishable from originals. That is, if you create a replicant of a document, you can change either the original or the replicant and both instances instantly reflect the change. (In fact, the term "original" loses its meaning when you create a replicant, because every instance of a replicated document is identical to the others.) You can also delete either without affecting the other, because each replicant acts as an original, even though DEVONthink stores only one complete copy of the data.

I say more about replicants in Duplicate and Replicate Documents. Also see the sidebar Identifying Unread, Duplicate, and Replicant Documents.

- **Sheet:** In DEVONthink parlance, *sheet* is meant to evoke the idea of "spreadsheet." But really, a sheet is just a document consisting entirely of a table. You can add, delete, rearrange, and sort columns and rows; but sheets can't include formulas or calculations, produce charts, or do any other fancy spreadsheet-like stuff. See Create Documents in DEVONthink for more on sheets.

- **Smart group:** Just as the Finder has smart folders, Mail has smart mailboxes, and Music has smart playlists, DEVONthink has *smart groups*. Like the other examples, smart groups are, in fact, saved searches—you define certain criteria, and DEVONthink dynamically keeps your smart group updated with all the documents meeting those criteria. I discuss smart groups further in Use Smart Groups.

- **Tag:** A *tag* in DEVONthink, like a tag in the Finder, is a word or phrase you use to identify one or more documents. For example, say you have lots of recipes (perhaps stored in various groups), but because their titles and contents don't have any features in common, you want a quick way to tell DEVONthink, "This is a recipe." So you create a tag called "recipe" and apply it to each of those documents. Then you can search, sort, and perform other operations based on that tag.

  Each document can have any number of tags. Group names can optionally function as tags, too, although they're special tags that also identify a document's location in your database hierarchy. For more on tags, see Tag Documents.

- **Trash:** When you delete a document in DEVONthink, it goes into a Trash group—not to the Finder's Trash—so you can later retrieve deleted documents if you change your mind. There's a Trash group for each database as well as a global Trash group, but they're all displayed under a single Trash icon in the sidebar.

  To empty the DEVONthink Trash—which, surprisingly, moves its contents out of DEVONthink and into the Finder's Trash—choose DEVONthink 3 > Empty Trash. (Despite the warning DEVONthink displays when emptying its Trash, the items aren't deleted permanently until you empty the Finder's Trash.)

- **View:** A *view* is the arrangement of DEVONthink's main window. You can adjust many aspects of the window using the View menu; see Item List.

Importing vs. Indexing

The word "import" may evoke the idea of a complex, one-time operation of moving data from one app to another, changing its format in the process. But in DEVONthink, *import* just means moving a document (or other outside data) into DEVONthink. You may do this dozens of times a day! When you import a document into your DEVONthink database, the app does all of the following:

- Copies the original document to (or creates it in) the folder in which DEVONthink stores its database
- Indexes the document's contents, enabling fast searching without having to scan every file, every time
- Updates the DEVONthink database to reflect the document's title, attributes, and other metadata

This standard approach to importing data from outside DEVONthink leaves you with two copies of the document—the original, still in its existing location on your disk, and the copy DEVONthink stores. That means changes to one won't be reflected in the other, and you'll use twice the disk space (unless you then delete the original file). On the other hand, it also means all your DEVONthink data is kept safely together in one place, and even if you delete the original document (intentionally or otherwise), your DEVONthink database remains complete and intact.

> **Note:** I cover the mechanics of importing and indexing later, in Use the Import or Index Command.

However, you can add items to your DEVONthink database without copying them into DEVONthink's storage area—*indexing* without *importing*. (That is, you can accomplish the second two bulleted items above without the first one.)

When you do this, DEVONthink stores only a reference to the original file. You can still group, replicate, tag, and otherwise manipulate that reference in DEVONthink just as though it were any other document, but because it's effectively an alias to a file, changes you make to that document inside DEVONthink are reflected in the original on your disk and vice versa. If you index entire folders (which become groups in DEVONthink) and you move an item within DEVONthink from one indexed group to another, *the original file moves to the corresponding folder in the Finder*.

Deleting documents works much the same way, but you can modify the behavior to suit your needs. When you delete indexed documents in DEVONthink (whether they're indexed

individually or are part of an indexed folder) and empty DEVONthink's Trash, an alert like the one in **Figure 1** appears. If you click "Only in database," DEVONthink's copy disappears permanently but the original file remains in the Finder. Click Files and the original file disappears in the Finder too (while any indexed folders remain in place); click Files & Folders to delete the original copies of both the files and folders. On the other hand, deleting an indexed file in the Finder doesn't delete the document from DEVONthink, but it does mean DEVONthink can no longer access its data—all that remains is its metadata and the index entries for its content. (In some cases, even moving an indexed file in the Finder can have the same effect.)

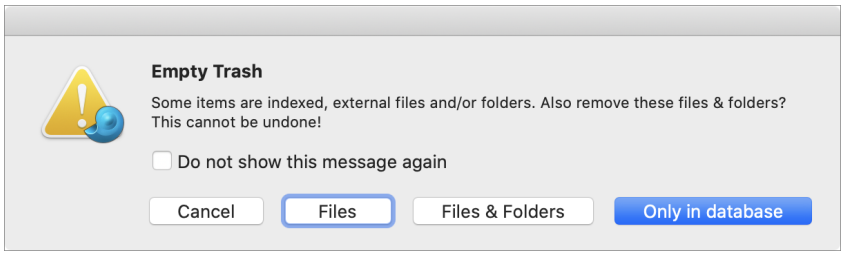


Figure 1: Use this dialog to determine what happens when you delete an indexed item and empty the Trash.

Updating Indexed Documents

Although DEVONthink usually updates its index automatically when a file on disk changes, sometimes things fall through the cracks—especially if the indexed file is on a network volume. Similarly, if you've renamed an item, changed its Spotlight comments, or made any other changes in DEVONthink while the original was unavailable, the corresponding file on disk might not update immediately when it's once again available. And so, at any time, you can force DEVONthink to recheck the links between its index and external files by selecting one or more documents or groups and choosing File > Update Indexed Items. When you do this, DEVONthink updates its database to reflect the files' current contents, updates metadata in the original files on disk as necessary, and removes from the index any files that no longer exist.

Note, however, that if you index a *folder* (as opposed to individual files), when you update the index, DEVONthink not only picks up modified and deleted files, but also adds to the index any new documents you may have added to that folder.

In a given database, you can freely mix and match imported and indexed content. So, on any given occasion, how should you choose which method to use?

As with everything in DEVONthink, there's no single right answer, but I suggest looking at the decision this way:

- If you want to maintain access to a file in the Finder but also keep track of it in DEVONthink, *index* it. (You can always move the item into your DEVONthink database later, if you change your mind.)
- If you're content having DEVONthink be the only place the document is located, import it—and then delete the original. (To see how to do this in a single step, see the sidebar Import, OCR, and Delete.)

For example, if you maintain a folder with hundreds of spreadsheets, and ordinarily open them from the Finder—but also want to track certain of them in connection with a project in DEVONthink—then indexing is the right move. It keeps the originals in place, but lets you take advantage of DEVONthink's numerous organizational features.

If, however, you want to use DEVONthink to store old email messages, or all the notes related to a class you're taking, or the word processing files and screenshots for a book you're writing—and see no need to access those items from the Finder independently—then importing (and deleting the originals) makes more sense.

What about importing but *not* deleting the originals? You're free to do that too, of course, keeping in mind that you'll use up extra disk space and that you could get confused over which copy of the document is which if you make changes to one but not the other. However, that might be the strategy you want if you're using some existing files (such as graphics) for a special, self-contained project and want to make sure any changes you make for that project don't affect the originals.

Stepping Stone: Try DEVONthink as You Read

As you read this book, it may be helpful to try some of the things I discuss. So, if you haven't already begun building a DEVONthink database, I suggest starting one and importing a small selection of files—preferably, ones containing mostly text—right now, just to have something to experiment with (you can always delete them later). Similarly, it's useful to have a few groups in your database.

It's *possible* to use DEVONthink without creating any database at all—you can just drag stuff into the global Inbox and work with it there, because behind the scenes, the global Inbox *is* a separate database. However, I recommend against doing this for the same reason I recommend against keeping all your email in your inbox: it defeats the purpose of an inbox as a temporary way station and makes organization harder.

So here's what I suggest. First, create a new database by choosing File > New Database. Name it whatever you like and store it in the default location (`~/Databases`) as a temporary sandbox. Create an empty group by choosing Data > New > Group. Give the group a name (any name will do; use "Stuff" if you can't think of anything else). Repeat this with a couple of other groups.

Then, drag a handful of files (say, a dozen or so) from the Finder onto one of the newly created group icons in DEVONthink. Good choices to start with are word processing files, HTML files, PDFs (perhaps even this very ebook), and plain text files.

Organizing Features

Many of DEVONthink's capabilities could be considered organizing features—even such simple and obvious things as its support for labels and hierarchical groups and tags. However, a pair of unique features that use DEVONthink's artificial intelligence (AI) go above and beyond in helping organize your data: See Also and Classify.

See Also is simply a list of *documents* (in the See Also & Classify inspector; see Classify Documents) that are similar to the one(s) you currently have selected, ranked in order of most to least similar based on an AI analysis of each document's contents. This list helps you

discover connections between documents and locate material that's relevant to whatever you're working on at the moment.

The Classify feature shows you which *groups* already contain documents similar to the one(s) currently selected—again, ranked in order of most to least similar. This list can help you identify the best place to file a document. The top choice (or, in some cases, more than one) is also available near the bottom of the Data menu: Classify to "*Group Name*" (or Classify to *X* groups). Choose this command and DEVONthink puts the selected item(s) in the group(s) it thinks match best.

Auto Group Is Dead. Long Live Group Similar Items.

DEVONthink 2 had a nifty feature called Auto Group that used artificial intelligence to examine selected items' contents, create new groups automatically, and sort the selected documents into those groups based on shared attributes. That feature was dropped in the transition to DEVONthink 3, but there is a new feature that behaves similarly, although it's a bit obscure: Group Similar Items.

In DEVONthink 3, select the items that need sorting, hold down the Shift key, and choose Data > Group Similar Items (⌘-Option-Shift-G). DEVONthink creates new groups for the selected documents it deems most similar to each other, and moves those documents into the new groups. After you use this command, you'll want to rename the automatically created group(s) and check to see if you agree with the results.

See Also Everywhere with DEVONsphere

If you like DEVONthink's See Also command, you can use it system-wide, thanks to the DEVONsphere app ($9.95). This app uses the same technology as See Also to identify items on your Mac that are related to whatever you're looking at—an email message, webpage, document, or whatever.

About DEVONthink's Artificial Intelligence (AI)

When DEVONthink says a feature uses "artificial intelligence," what does that mean? To oversimplify somewhat, DEVONthink has a fairly sophisticated algorithm that examines the text in a given document (along with document properties and custom metadata), compares it to the contents of all other documents, and mathematically computes the degree of similarity for each one. (It's analogous to the process a spam filter uses to determine, based on an analysis of an email message's contents, whether it's most likely spam or legitimate.) This helps you determine where a document belongs and which documents might be related to it.

Note that DEVONthink's AI does *not* examine filenames or tags, so you can't use them to give DEVONthink "hints" as to what you think should go where. And, because DEVONthink's decisions are largely based on word similarity, if you have multiple groups whose files contain quite similar words, DEVONthink may suggest the wrong destination. Remember, it's not magic—just statistics!

DEVONthink's AI engine is also used by the Summarize feature, and helps DEVONthink suggest names for scanned documents.

What DEVONthink Is Not Good For

If it's not obvious by now, I like DEVONthink a lot, and I think it's a fantastically useful, powerful, and flexible app. Nevertheless, it's not the right tool for every job, and there are

some tasks that it could theoretically accomplish…but not very well.

So, to save you the grief of trying to force a round peg into a square hole, let me give you a few examples of DEVONthink's limitations:

- **Cataloging photos:** If you're working on a project that includes photos (even a lot of photos) along with other types of data, it's no problem to keep your photos in DEVONthink. However, keep in mind that DEVONthink can't do half the things Photos can do (not to mention other photo library apps such as Adobe Lightroom CC). For that reason, I do not recommend using DEVONthink as the primary tool for storing and organizing all your digital images.

- **Managing music:** What's true of photos is equally true of music and other audio. DEVONthink can store audio files, no problem, and it can even play them back, but that's about it. You can edit some metadata for audio files in DEVONthink, but forget play counts, the iTunes Store, equalization, format conversion, and all the other things you rely on Music for.

- **Outlining:** Even though you could use a series of nested groups to create a rudimentary outline, or manually make a bulleted or numbered list with varying levels of indentation, DEVONthink lacks a proper text-based outliner (with collapsible entries) along the lines of the one in Microsoft Word or OmniOutliner.

- **Web browsing:** When it comes to viewing the odd webpage here and there (especially when following links from other documents in your database), DEVONthink's built-in web browser is adequate. However, I'd never recommend it as a primary web browser, because it lacks many of the tools and convenience features of pretty much every standalone browser—form autofill, integrated search engine support, browsing history, and so on. (DEVONtechnologies does, however, make a capable standalone web browser; see the sidebar Using DEVONagent Pro with DEVONthink.)

> **Note:** For a detailed look at how to get the most out of any web browser, see *Take Control of Your Browser* by Robyn Weisman.

- **Reading news feeds:** For news feeds relating to a project that you're tracking in DEVONthink, the built-in RSS reader makes it easy to pull in and index relevant content. When it comes to reading feeds, most users prefer a dedicated app such as Reeder or NetNewsWire, but for some purposes (such as using smart rules to evaluate new articles), DEVONthink may be a better choice.

- **Editing complex documents:** DEVONthink's text-editing capabilities are adequate, but you wouldn't use them to write a technical book (like this one) or an academic paper. Instead, store your files in DEVONthink and edit them in your favorite word processor. Ditto for spreadsheets and other complex documents.

Explore DEVONthink's Interface

Now that you know the basic concepts and terms that DEVONthink uses, it's time to learn your way around. Because of the many ways DEVONthink can display your data and some of the unique tools it offers, you'll be on a firmer footing if you take a few moments to read this chapter and learn how the interface is organized, where to find the things that you'll use most often, and what some of the program's icons and other controls do.

Support Assistant

The first time you launch DEVONthink, a window called the Support Assistant opens (**Figure 2**) to welcome you and offer a tour of the app as well as links to tips, tutorials, support, and other help.

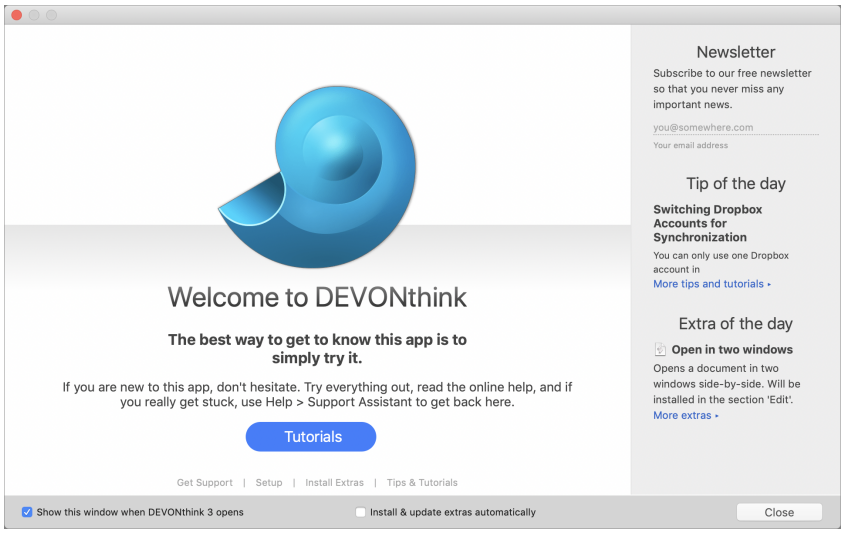


Figure 2: The Support Assistant welcomes you with tips and tutorials.

The Support Assistant window appears every time you launch DEVONthink. To keep it from doing so, deselect the Show This Window When DEVONthink 3 Opens checkbox. (You can then display it manually, whenever you want, by choosing Help > Support Assistant.)

Although it may not be obvious at first glance, you can access lots of useful features from this window:

- **Newsletter subscription:** To subscribe to a free periodic newsletter with DEVONthink tips, enter your email address under "Newsletter." Then click the blue checkmark icon to subscribe.

- **Tip and extra of the day:** The right side of the Welcome screen presents a random selection from the tips and extras, all of which are found elsewhere in the Support Assistant.

- **Technical support:** Click the Get Support link at the bottom of the window for shortcuts to the DEVONthink FAQ, user forum, and contact page, plus tools to retrieve a lost license (or buy a license if you're still using the free trial), update your name or email address, and read the DEVONtechnologies blog.

- **Extras:** Click the Install Extras link at the bottom of the window to display a screen with extra AppleScripts and templates (beyond those installed automatically or via the Add-Ons window, discussed next); you can install any of these by clicking the Install button beneath it. (To remove an installed item, click Remove.) You can also check the "Install & update extras automatically" box at the bottom, which installs all the extras immediately and keeps them up to date automatically.

- **Setup:** Click the Setup link at the bottom of the window for a quick three-step overview of how to get started with DEVONthink—make a database, install add-ons, and customize. (Feel free to skip these; I cover all these things later in the book.)

- **Tips and tutorials:** Click the Tips & Tutorials link at the bottom of the window to show a selection of text-based tips (at the top) and step-by-step illustrated tutorials (at the bottom).

Tip: To return to the initial screen of the Support Assistant at any time, click the Welcome link at the bottom of the window.

Add-Ons

If you haven't already installed the add-ons from within the Support Assistant, choose DEVONthink 3 > Install Add-Ons to display the Add-Ons window (**Figure 3**).

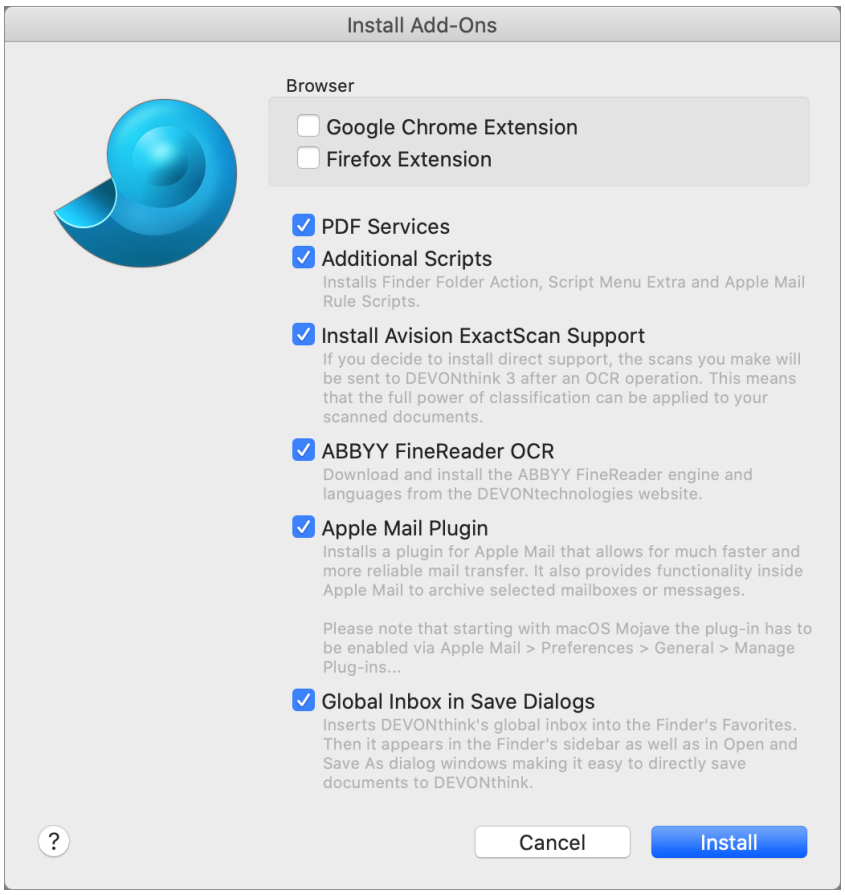


Figure 3: This window enables you to install useful add-ons with just a few clicks. (The "Install Avision ExactScan Support" checkbox appears only if you already have ExactScan installed.)

For now, I recommend leaving the default items selected, clicking Install, and following the prompts, because the additional tools will be useful to you. If you choose to skip this now, or omit any of the add-on options, you can always return to this window later. I describe each of these add-ons and how to use them later in this book.

Main Window

When you begin using DEVONthink, the main window looks something like **Figure 4**. This is where nearly all the action happens. Unlike DEVONthink 2, which had a great many windows, drawers, and floating palettes, DEVONthink 3 integrates almost everything into a single window, with sidebars, toolbars, and context-sensitive inspectors—much like Apple's iWork apps.

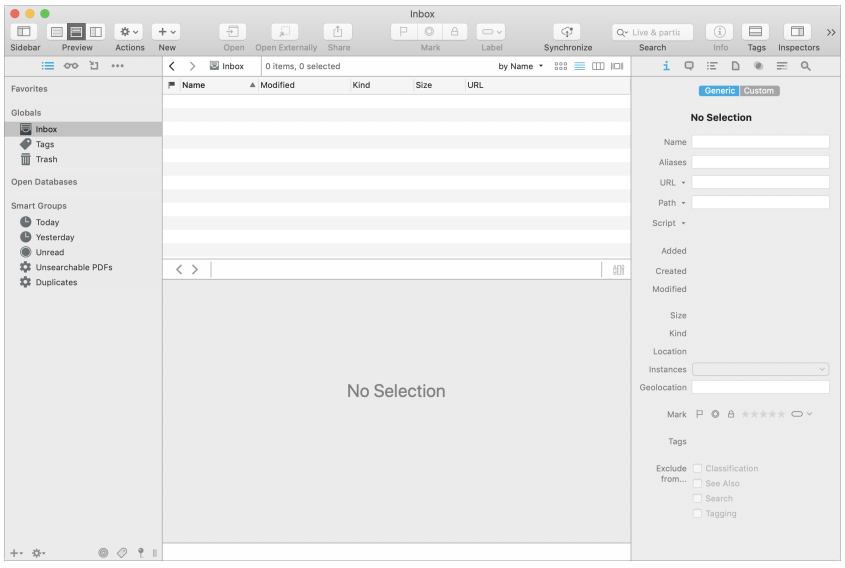


Figure 4: The main window in DEVONthink looks something like this by default.

Because every aspect of the window is customizable, yours may look different from the one shown here. But let's take a quick spin through the major parts of the default window. **Figure 5** below shows the main window as it appears with most optional areas visible—but with no documents yet in DEVONthink. I explain each labeled area ahead.

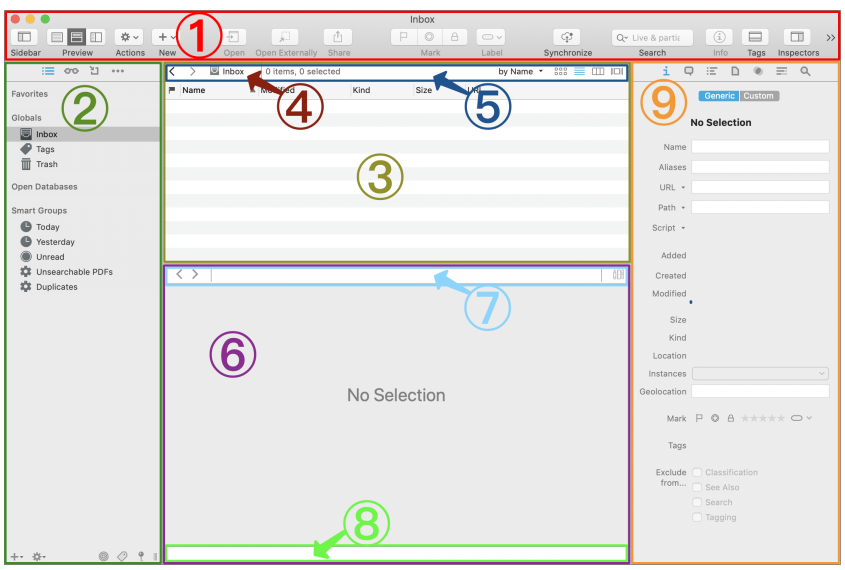


Figure 5: The main parts of the DEVONthink window: ① toolbar, ② sidebar, ③ item list, ④ path bar, ⑤ information bar, ⑥ view/edit pane (or preview), ⑦ navigation bar, ⑧ tag bar, ⑨ inspectors.

Note: DEVONthink 3 supports Dark mode in macOS Mojave and later; you can enable this in System Preferences > General. (With Dark mode enabled on your Mac, documents in DEVONthink have a dark background and white text by default; to change this, go to DEVONthink 3 > Preferences > General > Appearance and uncheck "Use dark background for documents.") In this book, however, all the images are shown using the Light appearance.

DEVONthink 2 offered six primary window configurations called views (Icon view, List view, Column view, Split view, Three Pane view, and Tag view), which arranged the main elements of the window in different combinations. It also offered Widescreen and two different Full Screen options for some of the above views. But DEVONthink 3 completely rethinks window configuration, offering a flexible set of controls to create *almost* any layout you may want, even if you get there in a slightly different way than before.

Although the preset views of yesteryear are gone, you can now selectively show or hide almost every part of the window, and choose a vertical or horizontal arrangement of the item list and view/edit pane. (And yes, the two Full Screen options are still there.) Keep reading in this chapter for further details.

Toolbar

The toolbar at the top (**Figure 6**) provides quick access to many commonly used DEVONthink features, such as showing or hiding parts of the window, marking and labeling documents, and searching. The contents of the toolbar change according to what (if anything) is currently selected.



Figure 6: Access frequently used commands via the toolbar.

To learn what any button does, hover over it briefly with your pointer, and a pop-up tooltip tells you the button's function. If you want to rearrange the buttons on the toolbar, add new ones, or remove ones you don't need, choose View > Customize Toolbar. Using the dialog that appears, drag icons onto or off of the toolbar, or drag them to other positions on the toolbar. You can also determine whether icons, labels, or both appear using the Show pop-up menu. Click Done when you're finished modifying the toolbar.

Each control on the toolbar is accessible in at least one other way (such as a menu command or keyboard shortcut). So, if you prefer to hide the toolbar to give yourself more space, choose View > Hide Toolbar.

Sidebar

Along the left side of the window is the sidebar, which is shown in **Figure 7**. To be more precise, DEVONthink can show any of four different sidebars, depending on which icon is selected at top. The Navigate sidebar shown below is the default and most common one, but there's also the Reading List sidebar, the Import sidebar, and the Extras sidebar, all discussed ahead.

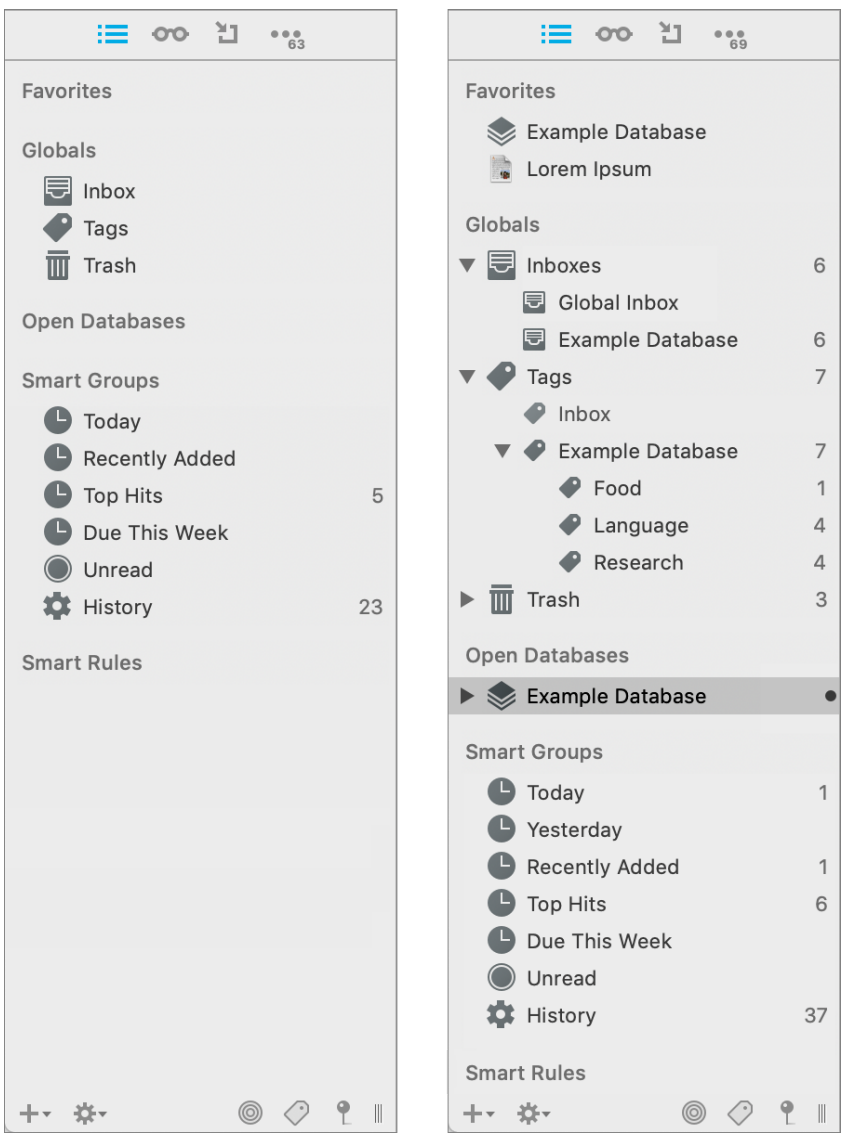


Figure 7: The sidebar displays your favorites, inbox, open databases, and other frequently accessed items. Left: as it starts out, mostly empty; right: populated with some example items.

You can hide the sidebar by choosing View > Hide Sidebar; to display it again, choose View > Show Sidebar. If the sidebar is hidden, however, you won't be able to see or access your

global Inbox (see Inboxes), Trash, favorites, global smart groups, or global smart rules.

Navigate Sidebar

The "main" sidebar view, shown above in **Figure 7**, shows global items (such as the Inbox, tags, and Trash from your global database, plus smart groups and smart rules); it also displays your open and recent databases, and your favorite databases, documents, and groups (see All About Favorites). It's handy to show this, for example, when you want to drag something from one database to another.

If you want to use the keyboard to move around within the Navigate sidebar, go to DEVONthink 3 > Preferences > General and select "Keyboard navigation" (in the Sidebar section). Having done that, you can do the following in the Navigate sidebar:

- Move up or down using ↑ or ↓.
- Expand or collapse a group using ← or →.
- Rename the selected item by pressing Return and typing a new name.
- Remove the selected item from the sidebar by pressing Delete or Backspace.
- Switch to the previous or next database with ⌘-Option-R and ⌘-Option-E, respectively.

> **Note:** Starting with DEVONthink 3.5, you can select multiple groups, smart groups, and/or feeds in the sidebar at the same time and see their merged contents in the main view.

By default, DEVONthink unifies all your databases under the Open Databases heading, and it unifies all your inboxes (in much the same way as Apple Mail) under the Globals heading. However, if you prefer, you can keep databases and/or inboxes separate.

You can alter these settings in DEVONthink 3 > Preferences > General > General:

- With "Unify databases" checked (the default), each database *along with its contents* is an entry under Open Databases (**Figure 8**, left). If you uncheck "Unify databases," only the database names are shown under Open Databases; select one to show its expanded contents under its own sidebar heading (**Figure 8**, right).

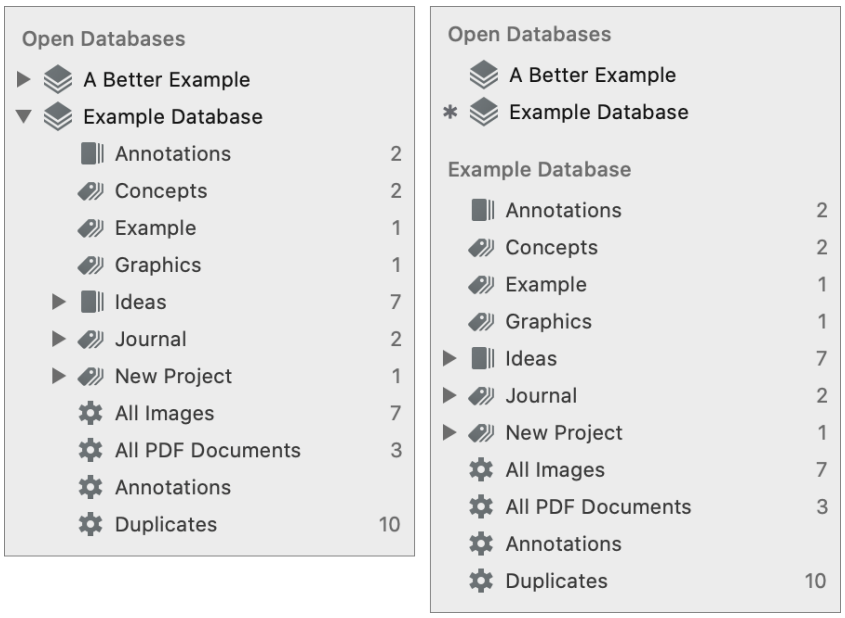


Figure 8: The effect of having "Unify databases" on (left) and off (right). In the latter, the selected database, expanded under its own heading, has an asterisk (*) next to its name under Open Databases.

- With "Unify inboxes" checked (the default), each database's inbox appears in the Inboxes group under Globals (**Figure 10**, left). If you uncheck "Unify inboxes," only the Global Inbox appears under Globals, while each database's inbox appears under that database's name in the Open Databases section (**Figure 10**, right).

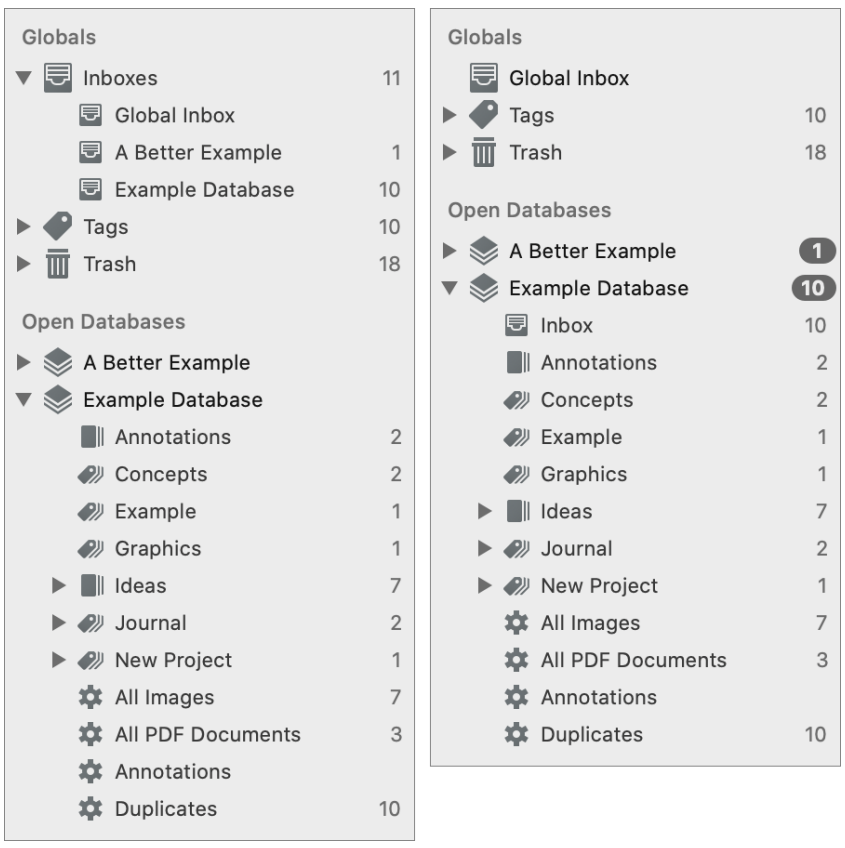


Figure 9: The effect of having "Unify inboxes" on (left) and off (right).

All About Favorites

The Favorites list at the top of the Navigate sidebar is for anything you want to be able to access quickly. To add a database, document, or group to the Favorites list, select it and choose Data > Add To > Favorites.

Apart from the sidebar, you can also access your favorites using the Go > Favorites submenu; they also appear in the Sorter and in various other locations (such as the Move To, Duplicate To, and Replicate To submenus). You can rename favorites in the sidebar; doing so affects only the favorite itself, not the original item.

Reading List Sidebar

New in DEVONthink 3 is the Reading List sidebar (**Figure 10**), which functions much like the Reading List in Safari and other browsers: it displays documents you've marked for later reading.

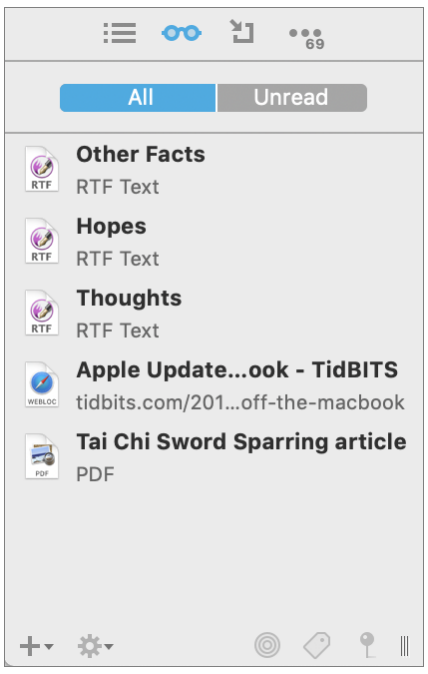


Figure 10: Documents to be read appear in the Reading List sidebar.

To add a document to the Reading List, select it and choose Data > Add To > Reading List (or the comparable commands on the Action menu or the contextual menu). The Reading List maintains its own read/unread status for each document, separate from the document's main status. Documents are marked unread by default, but when you select one, its status changes to read. (If All is selected at the top of the list, it shows both read and unread items; click Unread to show only unread items.) To remove an item from your Reading List (without deleting it from your database), right-click (or Control-click) it and choose Remove Item from the contextual menu. You can rearrange the Reading List via drag and drop.

Import Sidebar

The Pro and Server versions of DEVONthink have an Import sidebar (**Figure 11**), which adds yet another way to import scanned documents and email messages. For more details, see Scan Documents and Add Email Messages, respectively.

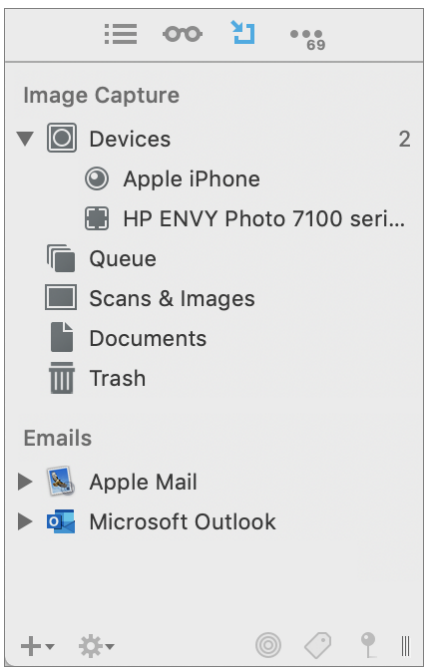


Figure 11: The Import sidebar provides just one of several ways to import scanned documents and email messages.

Extras Sidebar

Also new in DEVONthink 3 is the Extras sidebar, which (like the Support Assistant window) provides access to useful, up-to-date content and tools from DEVONtechnologies, including scripts, templates, smart rules, tips, tricks, and news (**Figure 12**).

Figure 12: The Extras sidebar gives you another way to access the latest tools and info from DEVONtechnologies.

Item List

The item list, sometimes referred to as the *view*, is the portion of the window (labeled ③ in **Figure 5**) that lists your documents and groups—it's the one part of the window that's always present, though you can change its appearance at any time. As in the Finder, you can display the items in the list as Icons, List, or Columns, as well as using Cover Flow (which was present in older versions of macOS, before being replaced with Gallery view in Mojave). At your option, the item list may also be accompanied by the view/edit pane, sidebar, inspector, and other window elements.

You can switch item list views by using commands in the View portion of the View menu, or by clicking the icons on the information bar.

Note: As I describe DEVONthink 3's views, I'll also refer back to the views DEVONthink 2 used (some of which use the same names), in an effort to help you create a window layout that resembles what you may have used in the previous version.

Stepping Stone: Pick a Layout, Any Layout

DEVONthink tries to be helpful by providing many different ways to configure your window and view your data, but switching between layouts can be disorienting. Documents may disappear, sort order may change, and other display elements may rearrange themselves in an unfamiliar way. So most people tend to pick a collection of layout settings that works for them most of the time, and stick with it—switching only when a need arises.

I suggest trying out each view (and other layout options) with your own DEVONthink data as you read this chapter, and perhaps taking a few notes on which ones seemed most or least helpful for future reference. Given the way I use DEVONthink, I personally prefer to have the sidebar, inspector, and Standard view/edit pane visible, along with either List view or Column view.

View as Icons

Icon view (**Figure 13**), which displays large thumbnails of each document, is perhaps the least useful option. While in Icon view, you can use the slider on the information bar to adjust the size of the icons. You can also sort the icons in many ways (by name, kind, size, and so on) using the pop-up menu next to that slider.

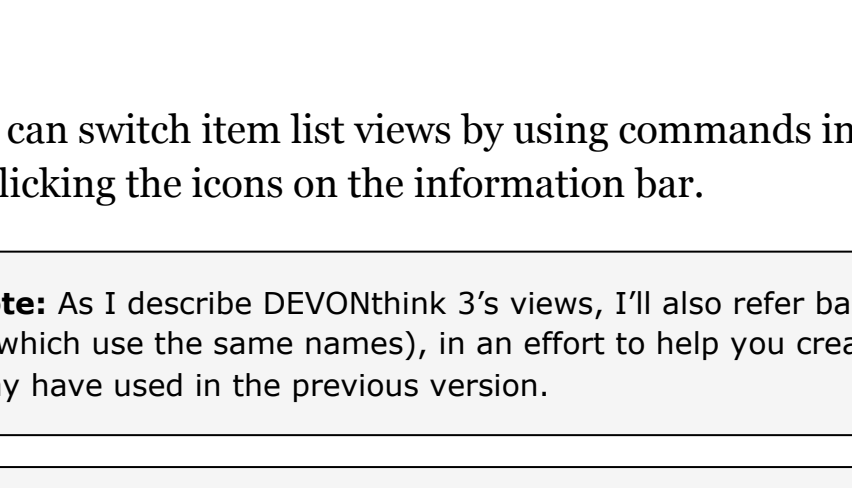


Figure 13: Icon view shows resizable thumbnails of each item.

Tip: To approximate DEVONthink 2's Icon view, enable the sidebar, set the View to "as Icons," and set the preview to None.

In Icon view only, you can choose View > Show Details or View > Hide Details (⌘-Option-L) to toggle the display of additional details about each document (**Figure 14**), giving Icon view some of the additional benefits of List view.

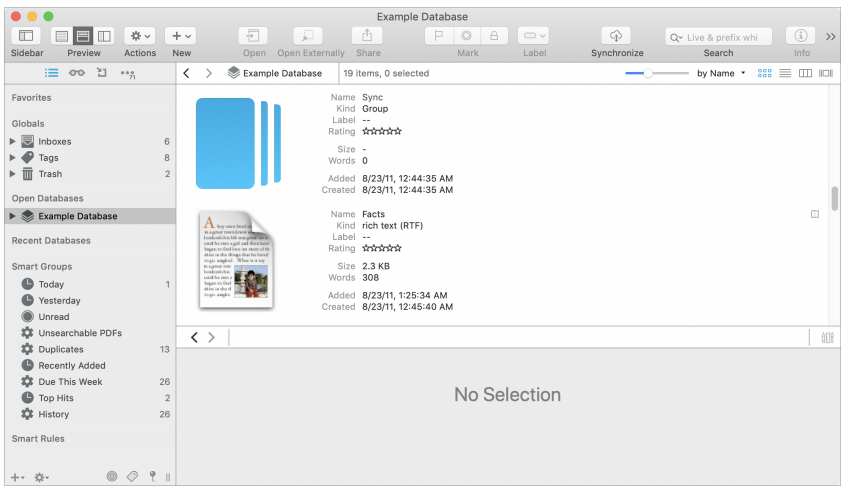


Figure 14: Show extra info in Icon view with the Details command.

View as List

List view (**Figure 15**) provides more detail about each document, as well as a hierarchical view of all your groups. By default, List view shows Name, Modified (date and time), Kind, Size, and URL columns. To change which columns appear, choose a column name from the View > Columns submenu. As you might expect, you can sort by a column by clicking its name; reverse the sort order by clicking again; drag and drop to rearrange columns; and resize columns by clicking the border between two adjacent column headers and sliding the pointer left or right.

Figure 15: List view provides more (and configurable) detail about each item in your database, and lets you see the contents of groups at a glance.

Tip: To approximate DEVONthink 2's List view, enable the sidebar, set the View to "as List," and set the preview to None.

A Word About Sort Order

Each view can automatically sort its contents in a wide variety of ways (such as by Location, by Due Date, or by Word Count). If the view includes column headers, you can click a header to sort by that criterion, and click again to reverse the sort order. (Right-click or Control-click the column header to add or remove columns.)

To adjust the sort order for views without column headers, or using criteria not shown in a column, use the pop-up menu on the information bar next to the view icons (the menu's name reflects the current sort order); choose Ascending or Descending from this menu to reverse the order. Alternatively, choose an item from the View > Sort submenu.

If you prefer to manually drag items into just the order you like, choose Unsorted.

View as Columns

Column view (**Figure 16**) lets you quickly navigate a deep hierarchy of groups without losing your place or running out of room on the screen.

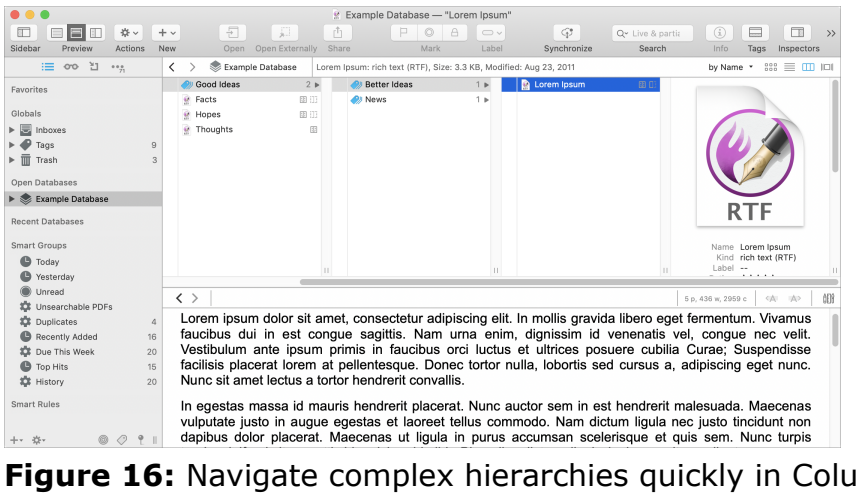


Figure 16: Navigate complex hierarchies quickly in Column view.

Tip: To approximate DEVONthink 2's Column view, enable the sidebar, set the View to "as Columns," and set the preview to Standard.

As in the Finder, you can drag the dividers between columns to resize them individually, Option-drag them to change the width of all columns at once, or double-click a separator to auto-resize to the width of the longest name. You can also sort by any criterion you prefer. To change the sort criterion, choose a command from the View > Sort submenu; choose Ascending or Descending from this menu to reverse the sort order.

Tip: DEVONthink's Column view (unlike the Finder's) lets you sort each column by a different criterion if you like—for example, the first by name, the second by date modified, and the third by size. Click in a column and then choose a command from the View > Sort submenu to sort that column.

Tip: To approximate DEVONthink 2's Split view, enable the sidebar, set the View to "as List," and set the preview to Widescreen.

Missing Views

Although I've added notes about how to get DEVONthink 3 to approximate DEVONthink 2's views, not everything can be mapped. For example, DEVONthink 3 has no real equivalent to DEVONthink 2's Three Pane view, which added a column between the sidebar and the item list/preview with a list of the selected database's groups. But that arrangement is also largely unnecessary now that the sidebar shows each database's groups.

There's also no exact equivalent to DEVONthink 2's Tag view, which showed an extra column on the right listing all the tags in the selected database. However, you can see tags for the selected document in numerous other ways:

- Tags appear in the Info inspector.
- You can display tags in a filter pane at the bottom of the Navigate sidebar by clicking the Tags icon.
- You can also display tags at the bottom of the view/edit pane by choosing View > Show Tags.

View as Cover Flow

Cover Flow (**Figure 17**) displays a large thumbnail of each document in the current group in a horizontally scrolling list; it's useful primarily for graphics. The selected item (in the middle; a bit larger than the others) shows a tooltip with the document's name and resolution; a full-size image appears in the view/edit pane.

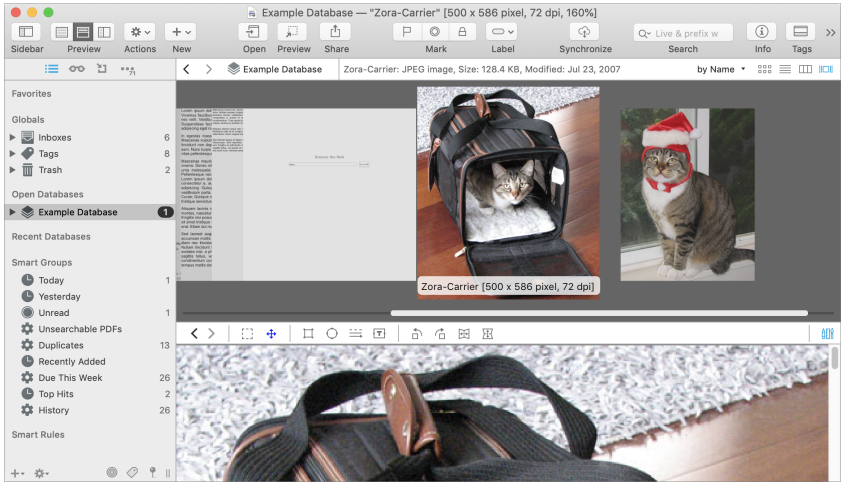


Figure 17: Cover Flow shows previews of each document.

Identifying Unread, Duplicate, and Replicant Documents

DEVONthink uses styles, icons, and (optionally) colors to identify documents of certain kinds:

- **Unread:** When a document name appears in bold and has a bullet in the Flag column, it's marked as unread.
- **Duplicate:** By default, duplicates have a special icon () next to their names. If you select "Mark duplicates and replicants in color" (DEVONthink 3 > Preferences > General), DEVONthink instead displays the name of each duplicate document in blue (omitting the icon). Note that duplicates can have different names from each other.
- **Replicant:** By default, each replicant appears with an icon () next to its name. If you select "Mark duplicates and replicants in color" (in DEVONthink 3 > Preferences > General), DEVONthink hides the icon and displays the name of each replicant in red (and italics). If you delete all but one replicant of a document, the remaining document's icon disappears (or its name reverts to black, as the case may be).

These attributes may be combined; for example, an unread, duplicated document has both a boldface name and the appropriate duplicate icon (or a blue color). And, if you replicate a duplicate, each replicant gets an icon () indicating that dual status.

Path Bar

Immediately above the item list is a horizontal strip with two sections divided by a vertical line. The left-hand section is the *path bar*, which helps you navigate within your database. It shows the item currently selected in the sidebar and a "bread crumb" path of enclosing groups, if any. You can click any item in this path to jump to that group. There are also back ‹ and forward › buttons, which work just like the ones in a web browser for moving to previously viewed documents. (You can even click and hold one of the buttons to see a list of earlier or later locations.)

Information Bar

Immediately to the right of the path bar is the *information bar*, which (as the name suggests) displays information about the currently selected item(s), such as the number of items in the current view and the number of items (if any) currently selected.

On the right side of the information bar is a pop-up menu to change the sort order (using any of dozens of pieces of metadata) and icons to switch between Icon, List, Column, and Cover Flow views.

View/Edit Pane

The *view/edit pane* (sometimes referred to as the *preview*) is the portion of the window (labeled ⑥ in **Figure 5**) that displays the contents of the selected document, if any. In most cases, it lets you edit it, too. Although you can double-click any document to open it in its own window if you prefer (or in an external app, depending on the setting of DEVONthink 3 > Preferences > General > "Double-click opens documents externally"), you can often do all

your editing right in the view/edit pane. I discuss editing further (whether in the view/edit pane or otherwise) in Edit Documents in DEVONthink.

As in web browsers and most document-based apps in macOS, the view/edit pane can have multiple tabs, each one showing a different document. The tab bar is normally hidden if only one document is open; to display it all the time, go to Preferences > General and check "Always show tab bar." Most controls for working with tabs (such as New Tab and Close Tab) are found on the Window menu. To open multiple documents, each in its own tab, hold down Option and choose Data > Open In Tabs (⌘-Option-O). (If the view/edit pane is not visible when you use this command, DEVONthink opens a separate document window, with each document in a different tab.)

Note: You can change the magnification of the view/edit pane by choosing View > Zoom > Zoom In or View > Zoom > Zoom Out (hold ⌘-Control and press + [plus] or – [minus], respectively).

Widescreen

The *widescreen* preview option (View > Widescreen or ⌘-7), positions the view/edit pane on the right side rather than at the bottom. This arrangement makes more efficient use of screen real estate on large monitors (especially widescreen monitors). **Figure 18** shows a widescreen preview along with List view; compare with **Figure 15**, which shows the same thing with a standard preview.

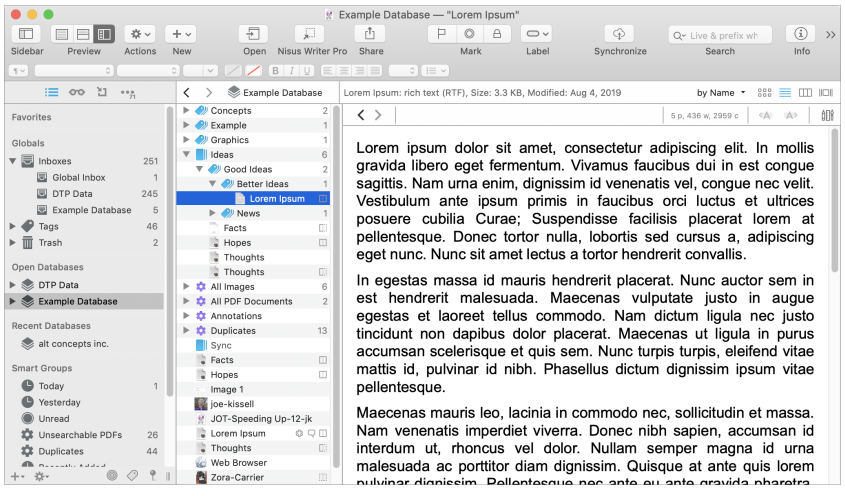


Figure 18: With the widescreen option turned on (as shown here with List view), DEVONthink positions the view/edit pane on the right rather than at the bottom.

Tip: By default, if you're using Column view, the widescreen preview shows only one column, but you can drag the divider between the item list and the view/edit pane left or right to change the size of the item list (and thus the number of columns shown).

Full Screen

If you find screen clutter distracting, you can use either of two Full Screen modes. First, you can opt for macOS-style Full Screen mode, which applies to the entire DEVONthink window; to enter this mode, choose View > Full Screen > Window (⌘-Control-F) or click the Full Screen icon in the upper-left corner of the window. To leave Full Screen mode, press Esc.

Alternatively, you can use DEVONthink's *document-specific* Full Screen mode. When you choose View > Full Screen > Document (⌘-F7), the selected document fills your entire screen; in the case of plain text and rich text documents, your entire screen turns black by default while text becomes bright green (**Figure 19**). To leave Full Screen mode, press Esc.

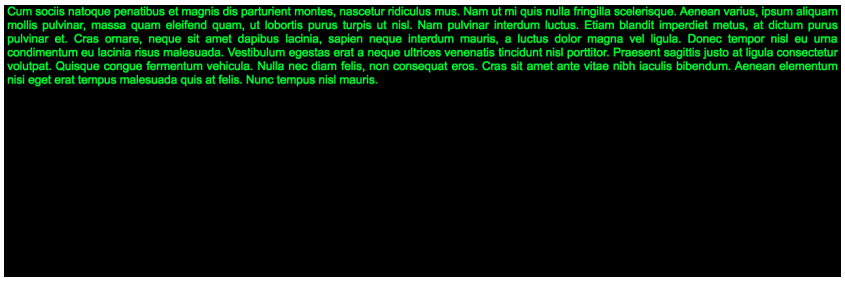


Figure 19: For minimalist text editing, choose Full Screen mode.

To adjust Full Screen mode's font, size, colors, and text width, go to DEVONthink 3 > Preferences > Editing and make changes in the Full Screen section.

Navigation Bar

At the top of the view/edit pane is a narrow strip of controls called the *navigation bar* (**Figure 20**; also labeled ⑦ in **Figure 5**). The selection of controls on the bar varies according to what type of document (if any) is selected and its current state.



Figure 20: The navigation bar as it appears for a PDF document.

In general, the navigation bar contains controls for (you guessed it) navigating within the view/edit pane, such as visiting the next or previous page within a web browser or PDF, as well as previous locations elsewhere in DEVONthink (using the same back ‹ and forward › buttons as on the path bar). One other control that appears consistently on the right side of the navigation bar is the Show Editing Bar button, which replaces the contents of the navigation bar with controls appropriate for editing the document type selected (e.g., one set of controls for text, another for graphics, and yet another for PDFs). I say more about this later, in Edit Documents in DEVONthink.

Tag Bar

Any document in a database can have one or more tags to help associate it with related content. One way to see those tags is to use the *tag bar* (**Figure 21**), which is labeled ⑧ back in **Figure 5** (see Tag Documents for more). Group tags Good Ideas (that is, tags

representing group names) show extra tabs on the right side; ordinary, non-group tags Language do not.



Figure 21: The tag bar can appear at the bottom of the window to enable you to view and edit tags.

The tag bar can appear at the bottom of the view/edit pane, whenever the view/edit pane is visible. To toggle it on or off, choose View > Show Tags or View > Hide Tags (⌘-Control-Option-T), or click the Show/Hide Tags button on the toolbar.

Inspectors

Just as the sidebar pane appears on the left side of the window and may display any of several different sidebars, the inspector pane (labeled ⑨ in **Figure 5**) appears on the right side of the window and may display any of seven different inspectors, depending on which icon is selected at the top. From left to right, they're the Info inspector, the Annotations & Reminders inspector, the Content inspector, the Document inspector, the Concordance inspector, the See Also & Classify inspector, and the Search inspector. (The currently selected icon appears in blue.) I describe each of these ahead.

Info Inspector

Besides listing statistics about the current document, this inspector lets you rename the document; exclude it from classification, search, See Also, and tagging; modify labels, tags, and Spotlight comments; see and navigate to duplicates and replicants; add aliases; and lock or unlock the document. I discuss many of these activities elsewhere.

DEVONthink Pro and Server expand the capabilities of the Info inspector by adding a Custom tab, where you can add any of numerous built-in or user-defined metadata types. To learn more about metadata generally and custom metadata specifically, refer to Work with Metadata, later in this book.

In case the inspector is hidden or displaying a different pane, you can also display the information from the Info inspector in a popover (**Figure 22**) if you select a document and choose Tools > Get Info (⌘-Shift-I) or click the Info button on the toolbar.

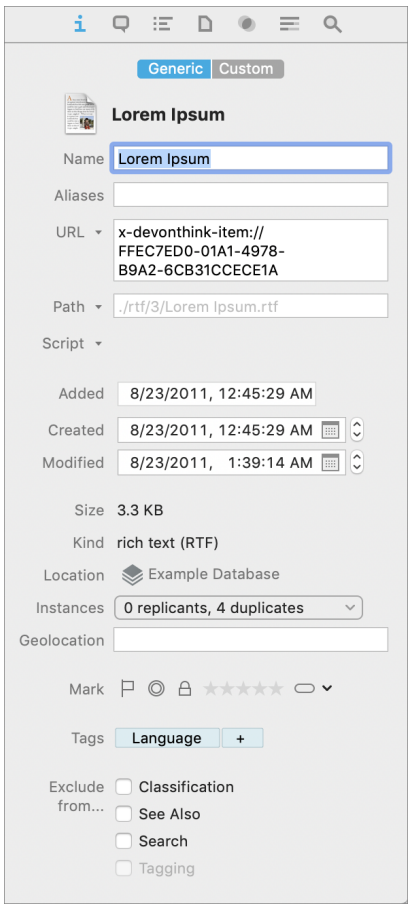


Figure 22: The Info inspector lets you change numerous document characteristics.

Annotations & Reminders Inspector

New in DEVONthink 3, the Annotations & Reminders inspector (**Figure 23**) provides the tools to set reminders (including alarms) about the current document (see Use Reminders), view or add Finder comments, and add or edit annotations (separate files containing comments about this file; see Template).

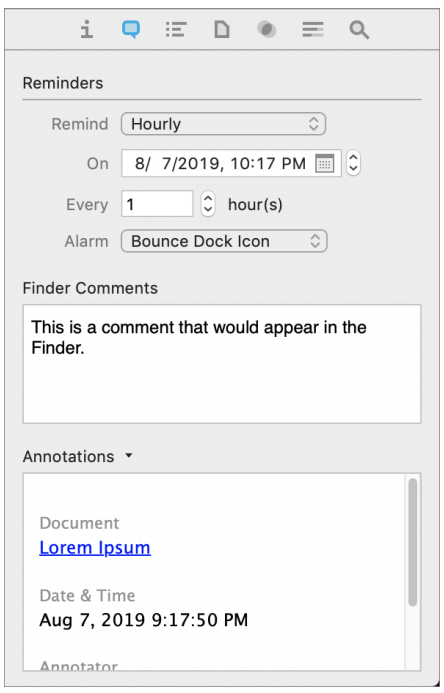


Figure 23: The Annotations & Reminders inspector lets you set reminders and add comments and annotations.

Note: DEVONthink uses the word *annotation* in two senses. *Annotation files* are linked documents containing comments on other documents (the sense described here), while ordinary annotations (such as those you add to PDFs or graphics) appear within a document and can include notes, shapes, and other extra-textual additions.

Content Inspector

Also new in DEVONthink 3 is the Content inspector, which displays the table of contents for PDF, Markdown, and EPUB documents that include one; it also shows thumbnails for PDF documents (**Figure 24**). Both the table of contents and the thumbnails are live, so you can click an item to navigate to that point in the selected document.

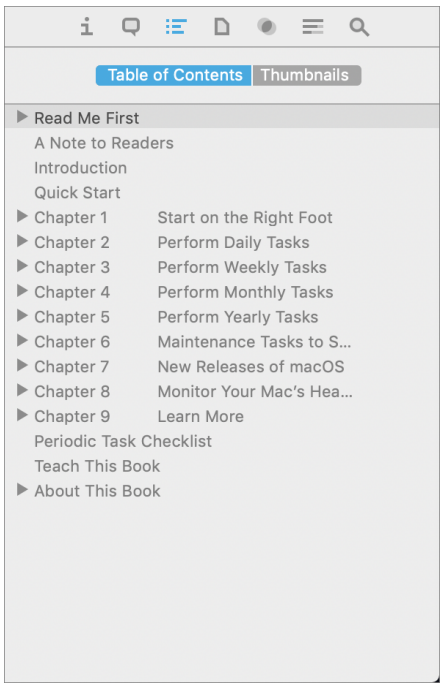


Figure 24: If your document contains a table of contents, you can view it (and navigate using it) in the Content inspector.

Document Inspector

Another new element in DEVONthink 3 is the Document inspector (**Figure 25**), which shows and allows you to edit a wide variety of document-level metadata. The Properties tab includes items such as author, title, subject, and keywords; the Annotations tab shows highlights in RTF files and PDF annotations (not to be confused with DEVONthink's annotation files), and the Links tab shows any external hyperlinks found in PDF and RTF files, as well as in web archives and other web-based documents.

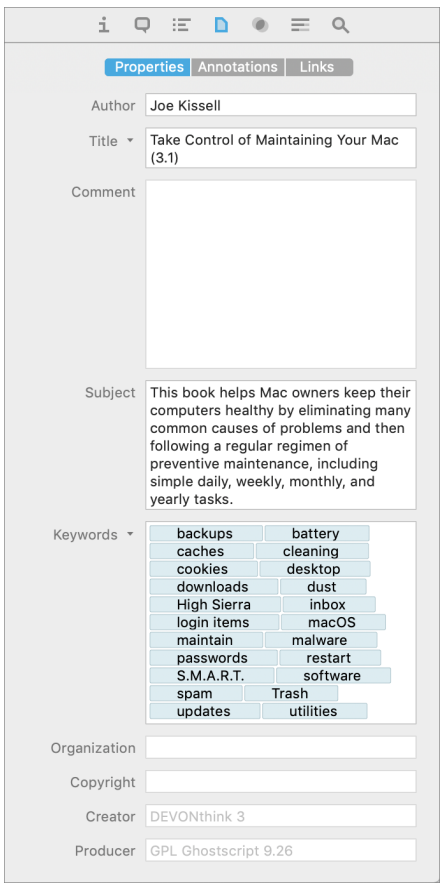


Figure 25: The Document inspector shows document properties, PDF annotations (and rich text highlights), and links.

Concordance Inspector

Do you wonder if you're overusing certain words, or are you curious about how often certain terms in a document occur relative to other terms? Select the document and choose Tools > Inspectors > Concordance > List or click the Concordance icon in the inspector. The Concordance inspector (**Figure 26**) lists every word in your document by frequency (number of occurrences).



Figure 26: The Concordance inspector shows all the words in your document, sorted by frequency.

I discuss the Concordance in more detail later, including how to use the feature across multiple documents—or even an entire database—and the new Cloud and Graph options

(see Search Using the Concordance).

> **Note:** The Concordance appears only in the Pro and Server versions of DEVONthink 3.

See Also & Classify Inspector

One of DEVONthink's coolest and most powerful features is found in the See Also & Classify inspector. The See Also and Classify features use artificial intelligence to help you determine where a document should go and what other documents may be related to it.

To open this inspector (**Figure 27**), select a single document and then choose Tools > Inspectors > See Also & Classify (Control-S). The top half of the inspector lists groups that may be a good place to store the document. The bottom half lists other documents that have similar contents to the one you've selected. I discuss these features further in Classify Documents.

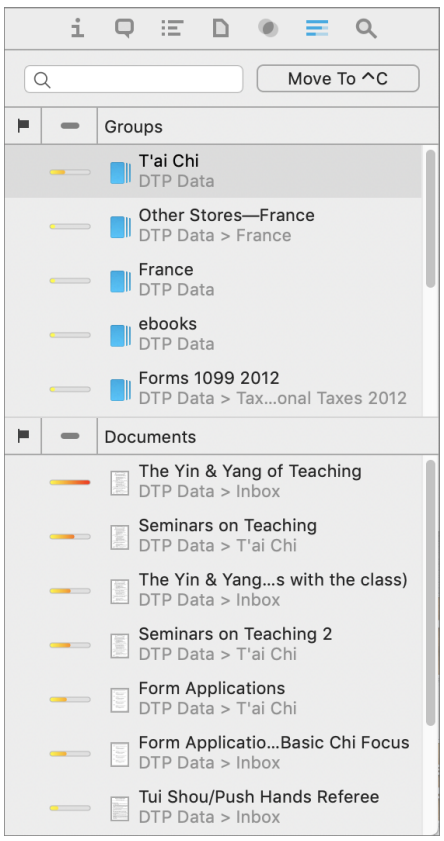


Figure 27: The See Also & Classify inspector helps you move documents to their proper home and find related documents.

Search Inspector

DEVONthink offers several ways of searching, but the Search inspector (**Figure 28**) is the place to go if you want to search and/or replace *within* the current document. Matches are listed at the bottom of the inspector and highlighted in the view/edit pane. To learn more about searching within a document, see Search Within a Document.

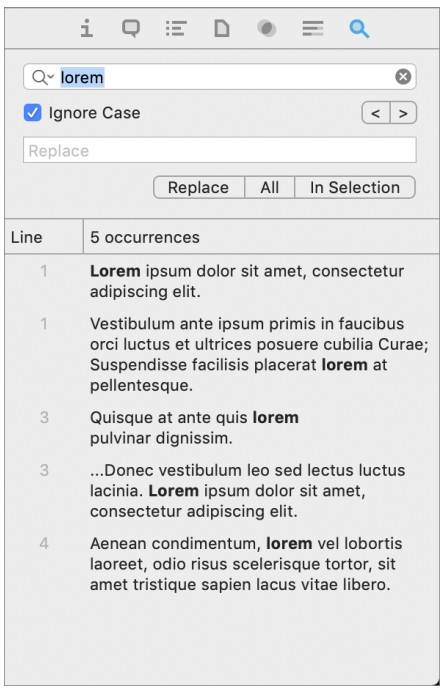


Figure 28: The Search inspector lets you do simple searches and replacements within the selected document.

Panels

A few windows in DEVONthink, called *panels*, look different from normal windows or popovers and provide extra info or special features. The following are the panels you're likely to see most frequently.

Activity

On the Activity panel, you can follow the progress of tasks that take a while to complete. To display this panel if it's not visible, choose Window > Activity (⌘-Option-A). Examples of what it may show:

- When you sync your database with another location (see Sync DEVONthink Databases), the Activity panel shows you the syncing progress. (If you're syncing directly between two Macs, it appears on both.) Ordinarily it disappears when the sync is complete.
- In DEVONthink Pro or Server, when you choose Data > OCR > "to searchable PDF" (or configure the app to perform OCR automatically on newly scanned documents), the Activity panel appears, showing the progress of each document as it is recognized and any documents waiting for their turn.

Note: Another way to view current activity is to look at the bottom of the Navigate sidebar, where an Activity pane appears as needed, and disappears when there's no further activity to report.

Download Manager

When you download a file from the web using the built-in web browser in DEVONthink Pro or Server, a Download Manager panel appears, much like the one in Safari or Firefox. It shows your current, pending, and recent downloads and lets you stop or redirect them.

To open this window, choose Window > Download Manager.

Log

The Log panel, which you can toggle by choosing Window > Log, lists errors and other status messages generated during DEVONthink's normal activities. These may include notices that documents have been imported or exported, for example, or that the database has been converted from an older format.

> **Note:** Starting in version 3.5, the log can also appear in a popover when you click the Log button on the right side of the toolbar.

If you find the Log panel intrusive and want to prevent it from appearing unless you explicitly display it, uncheck the "Show log automatically" box in the lower-left corner of the Log panel. (DEVONthink ignores that setting if it needs to display information on a critical error.)

Document Windows

If your monitor is sufficiently large, you may find it comfortable to do all your viewing and editing right in the view/edit pane of DEVONthink's main window. However, it's often more convenient to view, edit, or create documents in their own windows, which also provide extra toolbar buttons for your convenience.

> **Note:** DEVONthink can edit many types of documents and can display the contents of even more types (see Edit Documents in DEVONthink). If you double-click a document DEVONthink can't display, the document opens in its default application instead.

To open a document window, double-click any document (or choose a command from the Data > New submenu to create a new one from scratch). The appearance of the window and the controls available on the toolbar vary according to the type of document you're editing. For example, **Figure 29** shows the window for a rich text document.

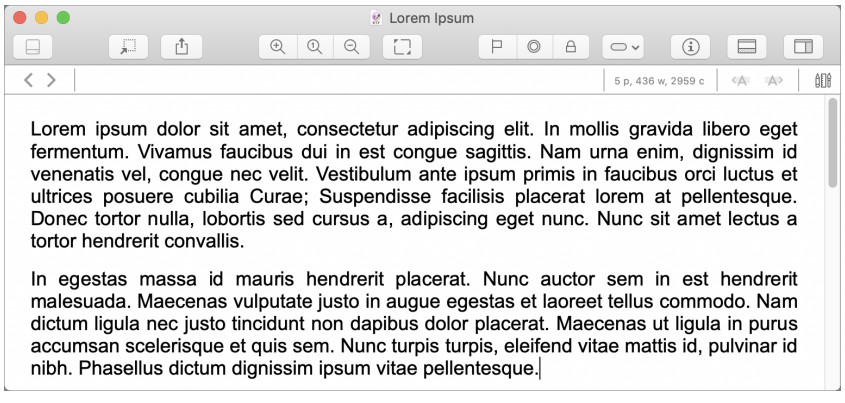


Figure 29: When you open a document in its own window, you get more room to work—plus a separate (and customizable) toolbar.

Inboxes

The next-to-last item I want to introduce you to on this interface tour is the inbox, which as I've already mentioned is meant as a storage place for newly imported or indexed documents you haven't yet sorted. In this respect it's rather like the inbox in your email app. (Just as I recommend trying to keep one's email inbox empty most of the time, I recommend the same for DEVONthink—the app is much more useful and effective when you group, or at least tag, each document.)

Because DEVONthink supports multiple databases, it has multiple inboxes, too—one for each database, *plus* a global Inbox (which is technically a separate database). Even if you've only ever created a single database, you still have two inboxes, because the global Inbox is always present. This fact can be either a blessing or a curse, depending on your point of view.

Your global Inbox appears at the top of the sidebar under Globals, which means that if your sidebar is hidden, you can't access it. (Choose View > Navigate, click the Sidebar button on the toolbar, or press ⌘-Option-1 to display the sidebar.)

> **Note:** It's all too easy to throw a bunch of documents into your inbox and forget about them, but DEVONthink works better when documents are in groups. It's also best to move items from your global Inbox into specific databases on a regular basis. You can learn about these tasks in the sidebar Stepping Stone: Get Stuff Out of Your Inbox(es).

So, when you import a new document, where does it go—the global Inbox or the one for a particular database? It depends primarily on your preferences, as I discuss later in Decide Where Your Documents Will Go.

DEVONthink in Other Applications

DEVONthink can change what you see in other applications by adding menu commands and other interface elements. A few examples:

- New Services menu commands (see Use the Services Menu)
- The Inbox that may appear in the sidebar of Finder windows and in Save dialogs (see Use the System-Wide Global Inbox)
- Extensions for Safari, Chrome, and Firefox (see Clip to DEVONthink Browser Extension), and browser bookmarklets (see Web Bookmarklets)
- New commands in Apple Mail (see Use the Mail Plugin)

Workspaces

Workspaces let you save arrangements of open databases, windows, documents, and tabs—plus the currently visible inspector, any selected sidebar filter, view selections, and advanced search options—and recall them instantly. If you rearrange items on your screen (or switch to a different workspace), you can return the display to its previous state with a single menu command.

Here’s what you can do with workspaces:

- **Create a workspace:** Choose Go > Add. Enter a name for your workspace and click OK.
- **Restore an existing workspace:** Choose Go > *Name of Workspace*. You can also press ⌘-Option-*number*, where the number corresponds to the order in which workspaces are listed at the bottom of the Go menu.
- **Modify a workspace:** To update an existing workspace to reflect the current arrangement of on-screen elements, choose Go > Update “*Name of Workspace*”.
- **Edit a workspace:** To edit a workspace’s name or order in the Go menu, or to delete it, choose Go > Edit. Then:
    - To rename a workspace, double-click its name, enter a new name, and press Return.
    - To rearrange workspaces, click and drag.
    - To delete a workspace, select it and click the minus − button.

Set Up DEVONthink Databases

Now that you know your way around DEVONthink, it's time to create one or more databases and start collecting information. You can set up a database with just a few clicks, but you may also want to customize (and even password-protect) your database.

Create a New Database

I mentioned earlier that you can use DEVONthink without explicitly creating a database, because the global Inbox functions (to a limited extent) as a built-in database. However, to use all of DEVONthink's features effectively, you'll want to create at least one database. (Later on, if the need arises, you can create more databases and copy or move items from one database to another.)

To create a database:

1. Decide whether you want your database to be encrypted. (See the sidebar Encrypting a Database, ahead, for guidance.)

2. Choose File > New Encrypted Database (for an encrypted database) or File > New Database (for an unencrypted database). A file dialog appears.

3. Enter a name for your database and choose a location (or accept the default location, which is now `~/Databases`). Note that DEVONthink expressly prevents you from storing your database in any cloud-synced location, such as Dropbox or iCloud Drive (including the Desktop and Documents folders, if you sync those via iCloud), because such locations aren't safe to use with databases. You can, however, *sync* your databases via Dropbox or iCloud Drive; see Sync DEVONthink Databases.

4. If you're encrypting your database, enter and verify a password, and choose a maximum size for your database—the largest size to which DEVONthink will permit it to grow.

5. If you want to keep the information in your DEVONthink database from being indexed by Spotlight, uncheck Create Spotlight Index. Doing so doesn't prevent you from searching within DEVONthink, but it does prevent the contents of the database from appearing in system-wide Spotlight searches. (You might deselect this option if you're encrypting your database and you want to ensure that no one with access to your Mac could search its contents, even though they'd be unable to open the resulting documents.)

6. Click Create.

DEVONthink creates a new, empty database.

Encrypting a Database

If you need to keep the contents of a database private, you can ask DEVONthink to encrypt it using AES-256 encryption. With this option enabled, the database can't be opened without the password you specify, and as long as it's closed, your data is safe from unauthorized parties. However, once you've opened an unlocked the database, anyone with access to your Mac can see its contents.

Encrypting a DEVONthink database makes the most sense when it contains sensitive data and your Mac is in an environment where other people can access it. If you're the only person who uses your Mac—and especially if you already have FileVault enabled—using DEVONthink's encryption adds little in the way of security, while requiring you to enter a password every time you open the database.

Although DEVONthink doesn't permit you to convert a database from encrypted to unencrypted (or vice versa), you can achieve essentially the same results by creating a new database of the desired type, dragging all your data from the old database to the new one, and then deleting the first database.

How Many Databases Do You Need?

DEVONthink lets you create as many databases as you want, and have any or all of them open at the same time. But how many databases do you need? There's no single right answer—it's up to you—but you may want to consider these factors:

- **Searching:** When you use the search field at the top of the main DEVONthink window, it uses the most recently used search scope by default (if possible); otherwise, it searches the currently selected database. You can change the search scope, but only after you've started your search.
- **Sharing:** When sharing your data using the built-in web server in DEVONthink Server (see Use DEVONthink's Web Server), you can enable or disable sharing for any database, but you can't control access on a lower (e.g., group) level. So if you want to share just a portion of your data, put that portion in its own database.
- **Organization:** You can create smart groups, replicants, and so on within a database but not across databases. So if there's a set of data that is completely self-contained, that might go in a separate database, whereas any data you want to intermingle with other data should be collected together in a single database.

If you're using DEVONthink as an all-purpose snippet keeper, note taker, and organizational tool, it usually makes sense to keep everything in a single database. On the other hand, if your work involves distinct projects that don't interact with each other, the best course is to use a separate database for each one.

Either way, remember that you can later split a database in two, or combine two databases into one (for example, by dragging groups from one database to another) if your needs change. Also keep in mind that if your database reaches many gigabytes in size, as can happen if you use it to store thousands of scanned documents, performance may suffer. In that case, dividing your data into somewhat smaller units can help.

Configure Database Properties

In most cases, DEVONthink's default options for each database are adequate. However, you can tweak a few database-wide settings that may be of interest. To see these settings, select a database in the sidebar and choose File > Database Properties > *Database Name*.

The Database Properties popover (**Figure 30**) appears. The lower portion of this popover contains statistics—the number of items of different sorts that appear in your database.

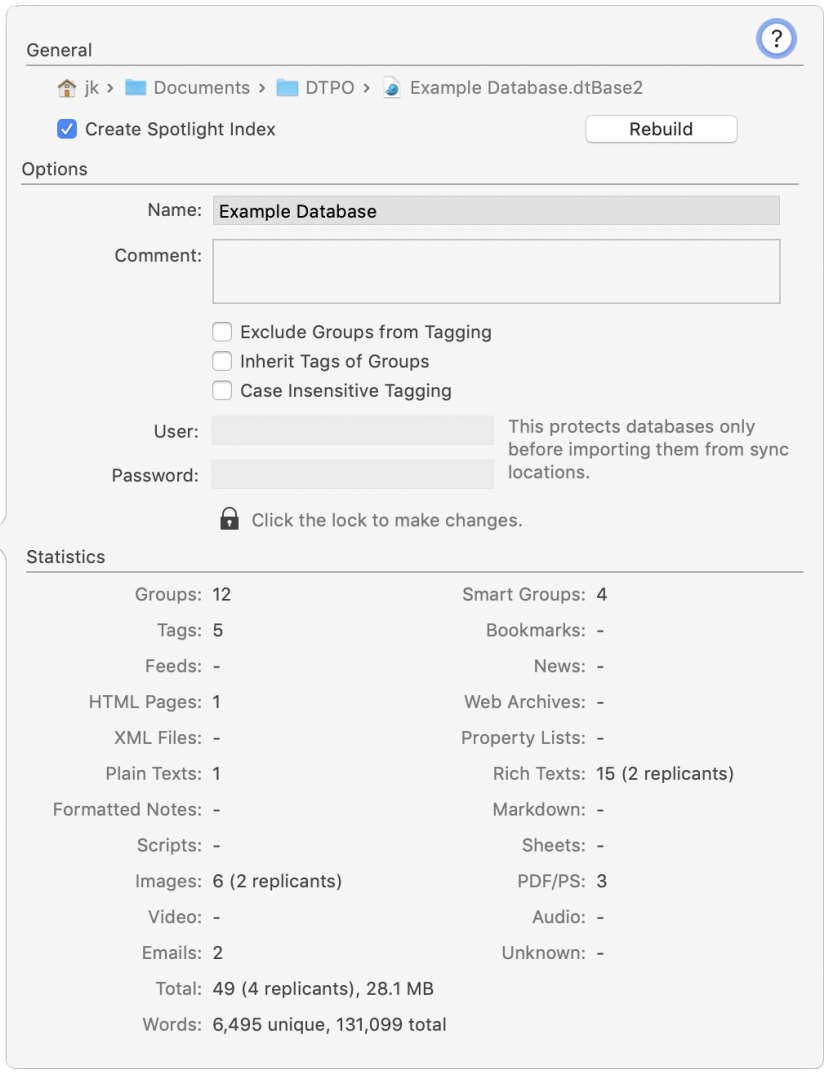


Figure 30: Set database properties, including password protection, in this popover.

The top half of the popover shows your database's location, and has controls for adjusting these database characteristics:

- **Create Spotlight Index:** DEVONthink always indexes your database internally. But if this box is checked (as it is by default), DEVONthink makes the database contents available in your system-wide Spotlight index too.
- **Rebuild:** To rebuild the database's Spotlight index (not the database itself), click Rebuild. This may be necessary if searches fail to return obvious document matches.
- **Name:** To rename your database, type a new name here. This changes the name as it appears in DEVONthink, as well as the file as it appears in the Finder.
- **Comment:** Enter any descriptive notes about the database as a whole here; when exporting files, these comments are used as the Finder's Spotlight Comments.
- **Exclude Groups from Tagging:** When this checkbox is selected (as it is by default for new databases), groups and tags are independent from each other in that database. This means, for example, that group names won't appear as auto-complete choices

when you enter tags, though DEVONthink does not prevent you from manually creating a new tag with the same name as a group.

When this checkbox is deselected, all group names automatically function as tags too, unless you have explicitly excluded a particular group from being used as a tag (by selecting the group, going to the Info `i` inspector, and checking Tagging in the "Exclude from" section). Groups that can be used as tags (which DEVONthink calls *group tags*) have icons that look like a stack of tags, while groups that are excluded from tagging have icons that look like a stack of rectangles.

If you like to use both groups and tags, leaving this checkbox selected is a good idea, as it prevents confusion that can arise from having both a group and a tag with the same name.

- **Inherit Tags of Groups:** When this is selected, any tags applied to a group are also applied to children (sub-groups) of that group.
- **Case Insensitive Tagging:** When this is deselected, you can have multiple tags that differ only in capitalization (like `recipes` and `Recipes`) but are nevertheless treated differently. When this is selected, DEVONthink prevents you from having tags that vary only in capitalization.
- **User and Password:** To require a username and password when syncing a database, click the padlock icon so it changes to the unlocked state. Then, enter a username and password in the fields provided and click the padlock icon again to lock it. (To remove password protection, repeat the procedure but leave the Password field blank.) However, note that this is weak protection that only affects syncing, and is entirely independent of whether you've encrypted the database.

How and Where Databases Are Stored

DEVONthink stores all its data in a container it refers to as a "database." The database isn't a single file, however, but rather a whole bunch of files. Some of them contain settings, metadata, and other information about the arrangement and attributes of your documents. The documents themselves are also stored, each as a separate file, in a series of folders inside the database (though their organization will be largely inscrutable to the casual observer).

DEVONthink stores its databases, by default, in your `~/Databases` folder. Each unencrypted database is stored in a *package* (sometimes called a bundle), a folder with a special setting that makes it look and act like a single file in the Finder, while encrypted databases are stored in special disk images. A DEVONthink database has the name of your database followed by the extension `.dtBase2` for unencrypted databases, or `.dtSparse` for encrypted databases.

Your global Inbox, meanwhile, is a separate database, stored in `~/Library/Application Support/DEVONthink 3`.

Get Information into DEVONthink

Whether you're starting from scratch with newly created data or importing content from existing files or Internet sources, DEVONthink offers many mechanisms for collecting information. In fact, the biggest problem you may have is deciding which method you should use to put a particular piece of information into your database.

In this chapter, I begin by discussing what you can put in DEVONthink and helping you figure out where you want DEVONthink to place newly added content by default. With this important decision out of the way, I then explain the major ways of adding data. I finish with Joe's Recommendations for Getting Stuff into DEVONthink, a topic aimed at helping you come to grips with all the choices.

What Can I Put in DEVONthink?

In case you're wondering what kinds of documents you can put in DEVONthink, the answer is any kind at all! DEVONthink can index anything containing text, and it can display nearly any kind of text or graphics file, most audio and video files, and even documents from Microsoft Office and Apple's Pages, Numbers, and Keynote apps.

Even if you import a document that DEVONthink can't display, the document can stay in the database, and you can open it using another app (see Edit Documents in External Apps).

Decide Where Your Documents Will Go

As you use DEVONthink, you can put each document in a specific group, in a catch-all inbox —perhaps in any of several databases—or in the global Inbox. For the most part, you get to choose where documents go, although there are cases in which you may not have realized what your choice was, so the result may be confusing if you're not familiar with DEVONthink's system.

The general rule (to which there are a few exceptions) is that documents go in either of two places:

- Where you put them
- A default destination, which you can choose (within limits)

When you create a new document from *within* DEVONthink—and that includes importing or indexing documents using the File > Import or File > Index Files and Folders command—it goes in the currently selected group, if any; if a tag is selected, or if no group is selected, it

goes to the inbox of the selected database. In other words, documents created from within DEVONthink are always in the "where you put them" category.

Likewise, if you drag a document, text clipping, email message, or anything else from the Finder or another app *into* the DEVONthink window, it goes where you drop it—into a particular group, an inbox, or the top level of the database, as the case may be. Once again: it goes where you put it.

However, if you start from outside DEVONthink—for example, when scanning a paper document, dropping a file on DEVONthink's Dock icon, using the Services menu (see Use the Services Menu), or using a bookmarklet (see Web Bookmarklets)—the imported document goes to your default destination for importing data.

To choose your default destination, go to DEVONthink 3 > Preferences > Import and set the Destination preference to one of these:

- **Global Inbox:** Everything you import or index goes straight to the global Inbox, no questions asked. This is the default.
- **Select Group:** If you select this radio button, the next time you import or index something starting from outside DEVONthink, a special panel appears (**Figure 31**), allowing you to select the location of your choice (and optionally add tags). You can also click New Group to create a new group and put the document there; if you're unsure where to put it, select your global Inbox or a database-specific inbox.

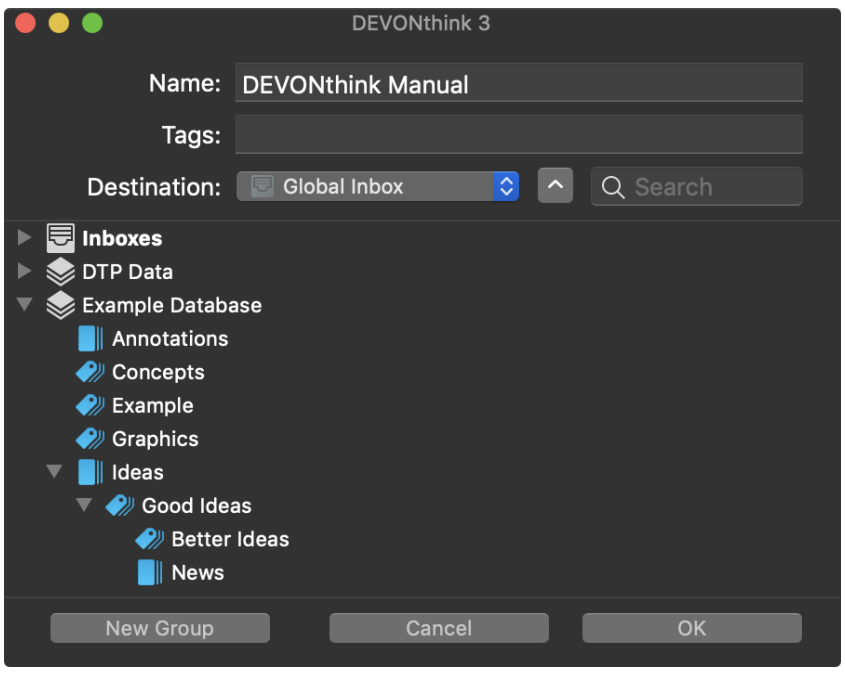


Figure 31: This panel appears when Select Group is your default destination and you add something to DEVONthink from outside the app.

Note: The option Inbox of Current Database, which appeared in DEVONthink 2, is no longer available. That's just as well, in my opinion, because it led to sometimes unpredictable results.

Which of these options you choose depends on whether you prefer to organize as you go or sort later, as I discuss in the sidebar Stepping Stone: Sort Now or Sort Later?, just ahead.

Stepping Stone: Sort Now or Sort Later?

There are varying schools of thought about how and when to go about organizing one's data. But assuming you've gotten over the initial hump of organizing a modest set of documents, the ongoing question remains as to how you deal with the new documents you add to DEVONthink.

There are two basic approaches:

- **Sort now:** Set your default Destination to Select Group, and sort every item as you import it. The advantage is that DEVONthink's inboxes won't get cluttered, and you'll never have to confront hundreds or thousands of documents in need of a proper destination. In addition, you'll be able to find things faster (even without searching), and Classify will work better. But the downside is that the Groups panel will keep popping up, interrupting your work—and if you end up dealing with this by selecting Inbox every time, you might as well change your preferred destination to the global Inbox.

- **Sort later:** A more Zen-like approach is to toss everything into your inbox (global or otherwise) and not worry about it. After all, DEVONthink has excellent search capabilities, not to mention the Group Similar Items and Classify commands, which can help you sort a large backlog of documents in a hurry. This approach isn't for neat freaks, as it requires a certain tolerance for messiness and ambiguity, and a willingness to search for almost everything you need.

Having tried both, my personal feeling is that the interruption of the Groups panel is more irritating than inbox clutter, so I tend to sort later. However, I'm disciplined enough to do (computer-assisted) manual sorting once or twice a week, so it goes quickly—and my Inbox never accumulates too many documents.

Stepping Stone: Finding a Way to Get Your Stuff into DEVONthink

No matter what app you're using or what sort of data you're looking at, there's probably a way—and maybe a dozen ways—to add it to DEVONthink. I'm about to show you quite a few of those ways, but you may find it helpful to think of them as falling into three broad categories.

- **Start in DEVONthink:** You can create several kinds of documents without ever leaving DEVONthink (see "Create Documents in DEVONthink," just ahead); you can also ask DEVONthink to grab files stored elsewhere on your Mac (see Use the Import or Index Command). You can even Use the Built-in Web Browser and Read RSS Feeds.

- **Start in another app:** Whether it's a file in the Finder, a text selection in a word processor, a page in a web browser, or a message in Mail, you can add info from just about any other app to DEVONthink (in some cases, even if DEVONthink isn't running). See Use Drag and Drop, Use the System-Wide Global Inbox, Use the Services Menu, Use the Sorter, Web Bookmarklets, Add Email Messages, and Use the PDF Menu.

- **Start with your scanner:** You may be able to touch a button on your scanner to scan a document and import it directly into DEVONthink (see Scan Documents, which also discusses other ways of getting scans into your database).

Don't feel you have to memorize all these options—just read the rest of this chapter to get a sense of what's possible, and as you do, jot down the two or three options you're most likely to use. And be sure to read Joe's Recommendations for Getting Stuff into DEVONthink, at the end of this chapter, where I wrap it all up.

Create Documents in DEVONthink

Many people use DEVONthink primarily as a place to store documents that originated elsewhere, but you can also generate many types of documents without leaving the app. If you're using DEVONthink to take notes, perform research on the web, or brainstorm ideas for your next novel, it's more efficient to create your documents within DEVONthink than to create them elsewhere and import them.

To create a new document, choose a command on the Data > New submenu or the Data > New from Template submenu. (Some of these commands also have toolbar buttons, keyboard shortcuts, or both.) Many options are available, and I encourage you to explore them if you have time. What follows are the document types you can create in DEVONthink.

> **Note:** When you create a new document, you can edit it right in the view/edit pane of the main window; or, assuming default preferences, double-click the document to open it in a separate window. (If, in DEVONthink 3 > Preferences > General, you select "Double-click opens documents externally," double-clicking opens the document in another app, but you can still open it in a DEVONthink window by selecting it and choosing Data > Open or pressing ⌘-O.)

With Clipboard

To make a new document in the current (or default) location with the contents of the clipboard, choose Data > New > With Clipboard (⌘-N). If the clipboard contains styled text, the note will be in Rich Text format; if it's unstyled text, it will be in plain text format; and if it's a graphic, it will be stored as a TIFF image.

Plain Text

To create a plain text document, choose Data > New > Plain Text (⌘-Control-Option-N). This is what I normally use for notes that don't specifically need styles, which is most of them—I find the consistency of a single font and size more pleasing to my eyes. You can, however, make a copy of a plain text document in Rich Text format by choosing Data > Convert > To Rich Text.

Rich Text

Rich text, in DEVONthink's usage, means text that can contain a variety of fonts, sizes, styles, and colors, as well as graphics and links; rich text documents are stored on disk as `.rtf` (Rich Text Format) or `.rtfd` (Rich Text with attachments) files. To create a rich text document, choose Data > New > Rich Text (⌘-Control-N). You'll find the formatting controls on the Format menu or its submenus.

Formatted Note

A formatted note, like a rich text document, can contain styled text, graphics, and links. Although the range of formatting options is somewhat smaller than what rich text offers (for

example, tables and numbered or bulleted lists aren't supported), the advantage of this format is that DEVONthink saves the document in HTML format. (In fact, it's a special, self-contained HTML document that has all graphics embedded within it.) This means you can drag the document to any web browser to view it (or drag it to the Finder and then post it on a web server), no exporting required. To create a formatted note, choose Data > New > Formatted Note.

Markdown Text

If you like to write using Markdown formatting (or with the MultiMarkdown variant), you can do so in DEVONthink and switch between the Markdown code (text-only mode) and the rendered page (preview mode). To create a new Markdown document, choose Data > New > Markdown Text. The document is initially in text-only mode so you can type your text and Markdown code; click the Preview icon on the editing bar or choose View > Document Display > Preview (⌘-Control-P) to view the final, rendered product. You can also view the Markdown source and the rendered result at the same time (provided your screen is wide enough) by clicking the Side-by-Side icon or choosing View > Document Display > Side-by-Side (⌘-Control-Y).

Note: For more information on working with Markdown (and HTML) documents in DEVONthink, see Edit HTML and Markdown Documents.

HTML Page

An HTML page is just that—a page composed of HTML. That may sound just like a formatted note, but they're different. DEVONthink always displays and edits formatted notes in WYSIWYG mode. However, HTML pages are rendered (that is, shown in uneditable preview mode) by default; if you switch to source mode by clicking the Source icon on the editing bar or choosing View > Document Display > Source (⌘-Control-X), you can then see and edit the underlying HTML source (just as you can with Markdown documents). Similarly, click the Side-by-Side icon to show the HTML source and the rendered page simultaneously. To create a new HTML page, choose Data > New > HTML Page.

Sheet

DEVONthink uses the term *sheet* to mean a document containing tabular data (a grid of columns and rows). Unlike the simple tables DEVONthink 2 offered, DEVONthink 3's sheets have way more flexibility, with 13 different data types (including single- and multi-line plain text, rich text, dates, and numbers), many with a variety of formatting options.

To create a sheet:

1. Choose Data > New > Sheet.

2. In the dialog that appears (**Figure 32**), type a name for your first column and press Return.

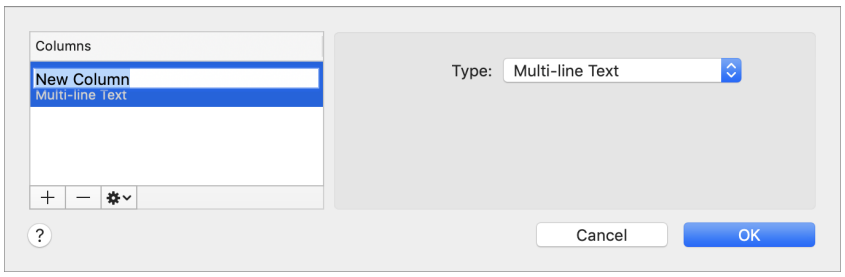


Figure 32: Add columns to a new sheet in this dialog.

3. Choose a data type for this column from the Type pop-up menu. In some cases, you'll need to specify additional characteristics—for example, numbers and dates can have different formats, and the Set option lets you specify a list of choices for each field in that column (which appear as their own pop-up menu).

4. To add another column, click the plus + button and repeat step 3. Continue for as many columns as you want your table to have. (You can always add more later.) Then click OK.

The newly created sheet (**Figure 33**) is initially empty, with a single blank row. You can begin typing immediately to fill in data. To add a new record (row), choose Tools > Sheets > New Record, or click the New Record icon on the editing bar. To add or remove columns or rows, use the other (self-explanatory) commands on the Tools > Sheets menu or the corresponding editing bar icons.

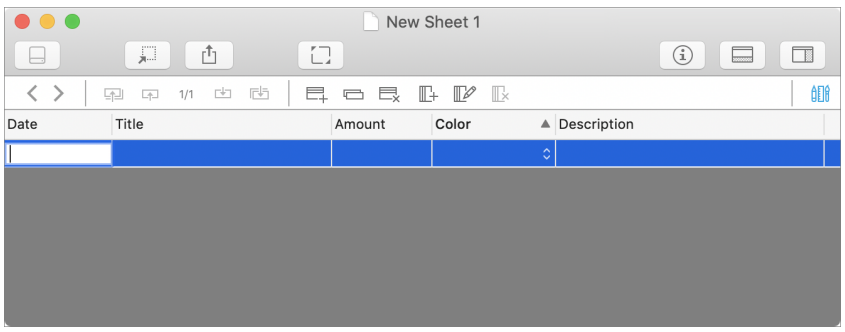


Figure 33: A new sheet with just one blank record added.

If you want to add, change, remove, or rearrange columns, you can view the dialog from step 2 again by choosing Tools > Sheets > Edit Columns or clicking the Edit Columns icon on the editing bar.

> **Note:** Unlike spreadsheets, DEVONthink's sheets offer no formulas or calculations—they're really just tables. However, DEVONthink does include a few AppleScripts on the Script > Sheets submenu that can perform calculations in sheets, such as computing the sum and mean of a row or column.

DEVONthink Pro and Server offer another way to view and interact with sheets: *form view*, which shows a single record in a form-like layout (**Figure 34**), which you may find friendlier and more convenient for data entry. To switch to form view, choose View >

Document Display > Form View or press ⌘-Control-X. (To switch back to table view, choose View > Document Display > Table View or press ⌘-Control-P.)

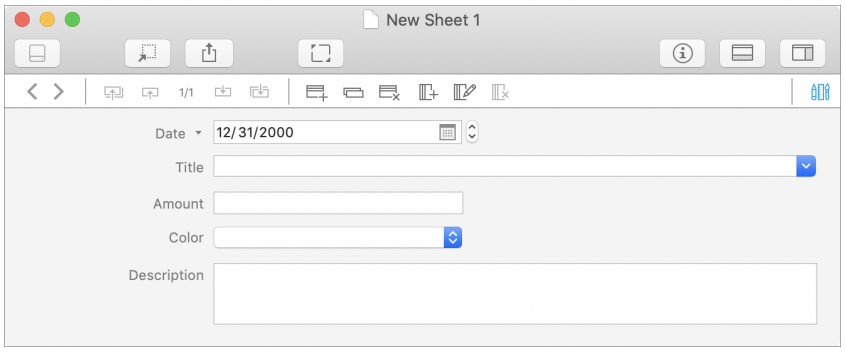


Figure 34: This is the same sheet as in the previous example, but shown in form view.

Note that the order of the form items from top to bottom matches the order of columns in the table view (and changes if you rearrange those columns). You can't otherwise customize the form view.

Template

When you create a new document, you need not always start with a blank slate. Instead, you can use a template to create a document that already contains boilerplate text, variables, and other custom attributes. The Data > New from Template submenu contains several lower-level submenus full of additional commands, all of which can be used to create new types of data (of one sort or another) in your database.

> **Tip:** You can add even more templates by choosing Data > New from Template > More Templates and clicking the Install button underneath any template that interests you.

To oversimplify slightly, a template is an ordinary document that optionally includes one or more special codes called *template placeholders* that result in the insertion of variables such as the current date and time or a link to a selected document (see the sidebar Using Placeholders, ahead). When you create a document from a template, you're essentially making a copy of that prebuilt document and allowing DEVONthink to fill in the placeholders with the currently applicable data.

For example, if you choose Data > New from Template > Productivity > Phone Note, DEVONthink displays a window like the one in **Figure 35**. Notice that in addition to the boilerplate text, it has the date and time it was created and fields to fill in other details. All these were provided by variable codes in the template file.

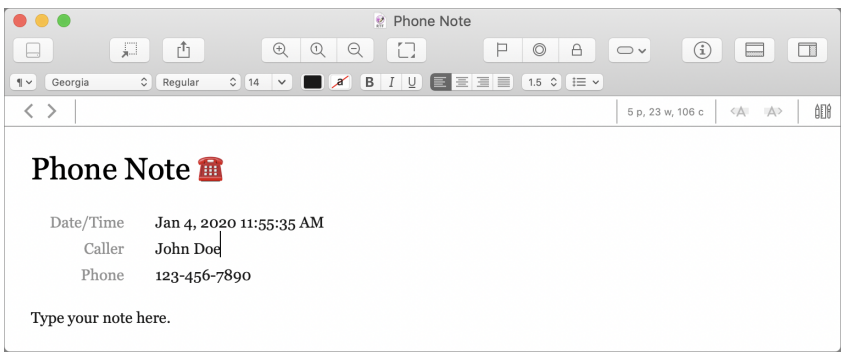


Figure 35: A new phone note has the date and time prefilled.

To edit an existing template:

1. Choose Data > New from Template > Open Templates Folder to open the folder in `~/Library/Application Support/DEVONthink 3/Templates.noindex` in the Finder.

2. Locate the template (with an extension of `.dtTemplate`) in that folder or one of its subfolders. Optional but recommended: Make a copy of the template and give it a new name, in order to keep the original intact.

3. Right-click (or Control-click) the template or copy, and choose Show Package Contents from the contextual menu.

4. In the folder corresponding to your language (for example, `English.lproj`), you'll see a `.rtf` file with the template's name. Double-click that file to open it in TextEdit (or whatever app you've configured as the default for editing `.rtf` files). Then you can edit it just as any other document (see **Figure 36**).

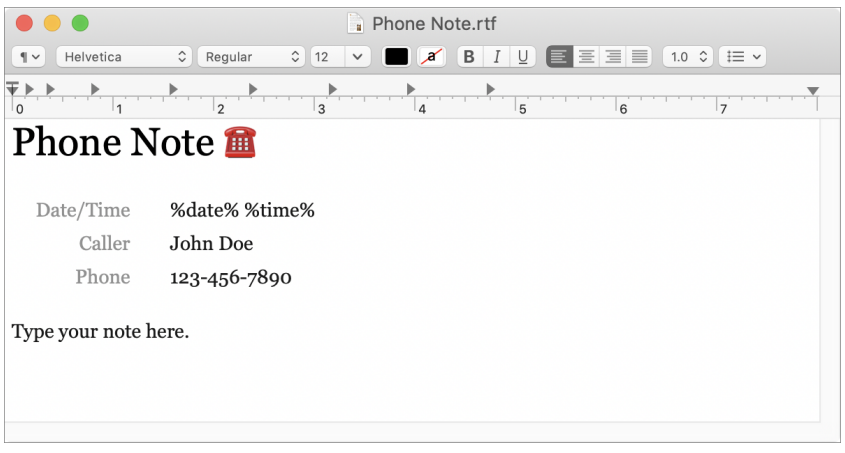


Figure 36: The template from the previous figure, open for editing as an RTF document in TextEdit. Notice the `%date%` and `%time%` placeholders.

5. When you're finished, save and close the document.

Note that a handful of templates DEVONthink includes don't have a `.dtTemplate` extension but rather a `.templatescriptd` extension. These are *smart templates*, which use AppleScript rather than simple placeholders and are considerably more powerful. I say more about smart templates in Use Smart Templates, later in this book.

Tip: You can create your own template by making a new document in DEVONthink and choosing Export > as Template, or by saving documents in the application of your choice and dragging them to the `~/Library/Application Support/DEVONthink 3/Templates.noindex` folder or one of its subfolders. You can also edit the existing templates, or remove them, as you prefer.

Templates are useful and flexible, and I could spend quite a few pages talking about them—but there are other pressing matters at hand! So try some of the existing templates to get a feel for what's included with the app, and make your own if you feel the urge.

Using Placeholders

DEVONthink uses special variables called placeholders to represent spots in templates (and other contexts) where information should be filled in dynamically. For example, in **Figure 36** above, the placeholders `%date%` and `%time%` are replaced with the current date and time, respectively, when you create a new document from this template. DEVONthink supports over 20 template placeholders, all of which take the form of a word surrounded by percent (`%`) symbols. See the topic "Template Placeholders" in the DEVONthink documentation for details.

However, templates aren't the only place where DEVONthink uses placeholders. In other locations, a much longer list of placeholders is available, and they're represented as little blue tokens rather than as text strings. The other spots where you can use placeholders are:

- **Imprints:** In the Pro and Server editions of DEVONthink, placeholders can be used in PDF imprints to do things like adding page numbers, headers, and footers. See Add Imprints.
- **Smart rules and batch processing:** Smart rules perform predefined actions on documents when certain trigger conditions occur; these actions can include various kinds of placeholders. See Work with Smart Rules.
- **WikiLinks:** The template used for new WikiLinks documents can include placeholders. See Work with Links and WikiLinks.

To see what placeholders are available in these other contexts and insert them, right-click (or Control-click) and explore the Insert Placeholder submenu of the contextual menu. The DEVONthink documentation has more details in the "Placeholders" topic.

Use the Import or Index Command

For adding individual documents, the methods described later in this chapter (using drag and drop, the Services menu, the Sorter, and so on) make the most sense. But if you want to suck in hundreds or thousands of documents at once, a more logical approach may be to use DEVONthink's Import or Index command. (Flip back to Importing vs. Indexing if you need a refresher on these options.)

Import

To import files and folders, do the following:

1. Choose File > Import > Files and Folders.
2. Navigate to the location where the items are stored.

3. Select one or more files or folders (⌘-click to select more than one item), and click Open.

DEVONthink imports the items, putting them in the location you specified in your preferences.

> **Note:** There are several other commands on the File > Import submenu, designed for handling specific kinds of data or importing from other apps (such as Evernote and Yojimbo). I discuss some of these commands elsewhere in this book.

Index

To have DEVONthink index files and folders (without copying their contents into its database), do the following:

1. Choose File > Index Files and Folders.
2. Navigate to the location where the items are stored.
3. Select one or more files or folders (⌘-click to select more than one item), and click Open.

DEVONthink indexes the items, putting references to them in the location specified in your preferences. Items that are indexed rather than physically stored in your database appear with a tiny Finder icon to the right of their filenames.

If you later decide that you want a given indexed document to be imported instead, select it and choose Move Into Database from the Actions pop-up menu on the toolbar, or right-click (or Control-click) it and choose Move Into Database from the contextual menu.

Use Drag and Drop

The method I use most often to get information into DEVONthink is good old-fashioned drag and drop. You can drag almost anything to DEVONthink—one or more files or folders, selected text or graphics in most applications, the URL from a browser's address bar, and so on. (For the most part, if you can drag it, you can drag it to DEVONthink.)

However, when I say, "drag to DEVONthink," that could mean several different things, any of which you may want to use from time to time:

- **Dock icon:** Drag something to DEVONthink's Dock icon to import it to your default location.
- **A group or tag:** Drag something to any group or tag in a visible DEVONthink window to add it to that group or apply that tag. Keep in mind that if you drag something from

outside DEVONthink to an ordinary tag (not a group tag), the item will be stored in the database's inbox.

- **The DEVONthink window:** You can drag items directly into the main DEVONthink window—for example, drop items on any inbox, database, group, or tag in the sidebar or in any view. When you drag something into the DEVONthink window and your pointer is over a valid target area, that portion of the window is outlined in blue and your pointer acquires a green plus badge.

- **The Sorter:** DEVONthink has an optional window called the Sorter that can take the form of a menu extra on your main menu bar or a slide-out panel with an onscreen control called a docked tab. When the Sorter is visible, you can drag items onto any database, group, or tag in it. See Use the Sorter for details.

When you drag a file to DEVONthink in any of these ways, DEVONthink ordinarily *imports* the file—that is, it copies it into its database and doesn't delete the original. If you want to import it *and* move the original to the Trash, hold down ⌘ while dragging it. Or, if you prefer to *index* a file—without making a copy of it—hold down ⌘ and Option while dragging it. (That's the same shortcut used to make an alias in the Finder, which is roughly analogous to what you do when you index a file in DEVONthink.)

Import, OCR, and Delete

It's also possible to automatically import a file, perform OCR on it, and delete the original—all in a single step! In the first version of this book, I described a method using an AppleScript Folder Action, but as of DEVONthink version 3.0.2, there's a better way that uses a smart rule (see Work with Smart Rules for details).

To set this up, start by indexing the folder in the Finder where you'll put documents you want to perform OCR on, and create a destination group for the final product within DEVONthink. Then set up a smart rule as shown in **Figure 37**.

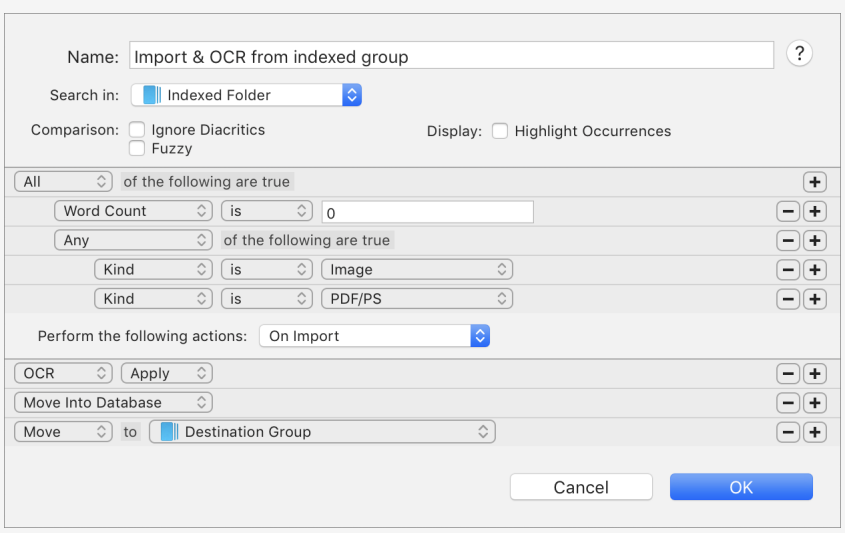


Figure 37: *This smart rule runs OCR on anything you drag into the indexed folder, then moves that item into your database.*

Now, when you drag a file into that folder, the smart rule runs: DEVONthink performs OCR on the document, moves the document into your database (thus deleting the original from the folder in the Finder), and then moves it into the destination group you specified.

Use the System-Wide Global Inbox

Because DEVONthink supports multiple databases, it also offers a global Inbox where you can store items without having to decide immediately which database to put them in (see Inboxes for more details). This global Inbox is basically a special, always-open database that appears in DEVONthink's sidebar. However, you can also make it available in the Finder and in any app's Save dialogs; in this context, I refer to it as the system-wide global Inbox—in other words, a system-wide shortcut to the global Inbox.

The system-wide global Inbox isn't installed automatically. If you didn't opt to install it when you first ran DEVONthink, choose DEVONthink 3 > Install Add-ons, check Global Inbox in Save Dialogs, and click Install. Thereafter, you should see an Inbox icon in the sidebar of Finder windows under Favorites (**Figure 38**). If you prefer, you can drag it to a different location within the Favorites group.

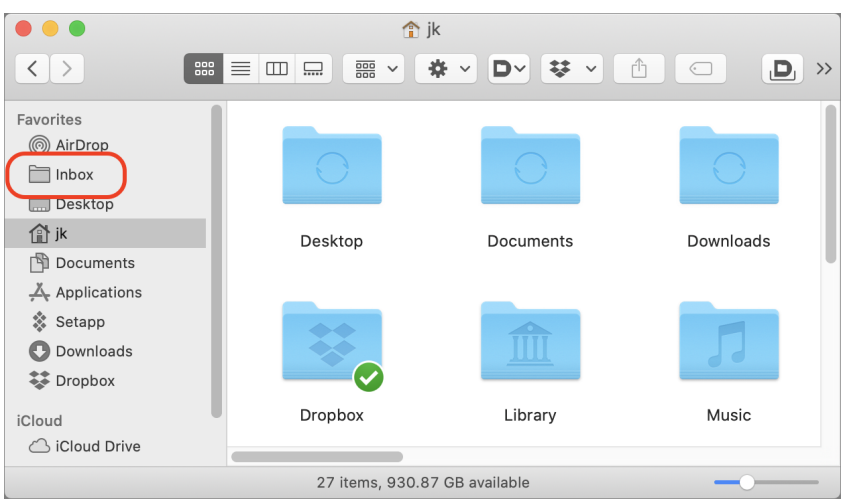


Figure 38: Your system-wide global Inbox (shown here circled in red) appears in the sidebar in your Finder windows.

Warning! Don't rename the Inbox shortcut in the Finder, as that will break a bunch of things in DEVONthink.

To add a file or folder to your DEVONthink database from the Finder, simply drag it to this convenient icon.

However, dragging files to the system-wide global Inbox icon works much differently from what you may expect if you're used to dragging files to DEVONthink in any other way. Specifically:

- When you drag something to the system-wide global Inbox, you *move* that file or folder to DEVONthink rather than just copying it; the original disappears. (To force a copy instead, hold down Option as you drag; to force an index rather than an import, hold down ⌘ and Option.)

- Dragging to the system-wide global Inbox icon always puts the item(s) in DEVONthink's global Inbox, regardless of your preferences for how imports are usually handled. Items dragged to this icon never prompt you to select a group.

- If DEVONthink is running, the system-wide global Inbox icon essentially functions as a one-way drop box—it always appears empty, because it sends everything you put in it directly into your global Inbox. If DEVONthink isn't running, it acts as a regular folder; you can drag things out of it later if you wish.

Now, this different behavior may, in fact, be exactly what you prefer. For example, if you like to put documents into DEVONthink and then delete the originals, simply dragging them to the system-wide global Inbox saves you the extra step of deleting. But just be sure you know what you're getting yourself into.

The system-wide global Inbox also appears in the sidebar of every application's standard Save dialog (**Figure 39**).

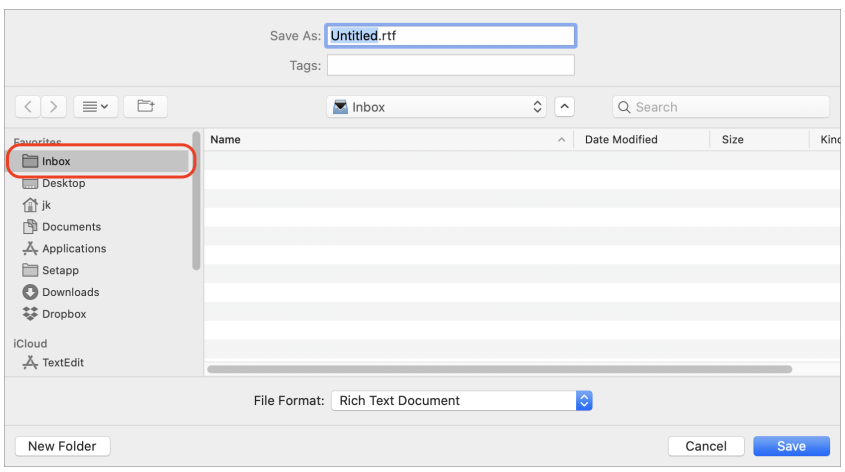


Figure 39: The system-wide global Inbox (shown here circled in red) appears in the sidebar of Save dialogs.

When saving a file from your favorite word processor, graphics editor, or other app, you can select that icon in the sidebar as the destination and thereby save it directly into your DEVONthink global Inbox! If you create a lot of documents in other apps that you want to store in DEVONthink, this saves you numerous steps. But, beware: the files you save in this way won't show up in the Finder; the *only* place you'll see them is in DEVONthink's global Inbox. So that should be the first place you look if you're missing a file that you're sure you saved.

> **Tip:** The global Inbox isn't much good if documents stay in it forever. For help dealing with all the items that accumulate there, see the sidebar Stepping Stone: Get Stuff Out of Your Inbox(es).

Use the Services Menu

One of the Mac's best-kept secrets is a mechanism called Services, which lets an app share some of its capabilities with other applications. Using services, you can take advantage of a handful of DEVONthink features even when you're working in other apps. Specifically, services provide yet another way to get information into DEVONthink (along with a couple of other cool capabilities).

Services appear in several places. One is the Services submenu of the application menu (that is, the menu bearing the name of the current application—e.g., the Mail menu if you're in Mail). Select a file in the Finder, or text in Safari, say, and go to this menu to see what services apply to whatever it is you've selected. You can also find services listed at the bottom of the Actions pop-up menu on the toolbar of Finder windows and at the bottom of the contextual menu that appears when you select something and right-click (or Control-click).

In addition, some services have keyboard shortcuts (as shown on the *Application* > Services submenu and in **Figure 40**), and you can add your own shortcuts (as I describe shortly).

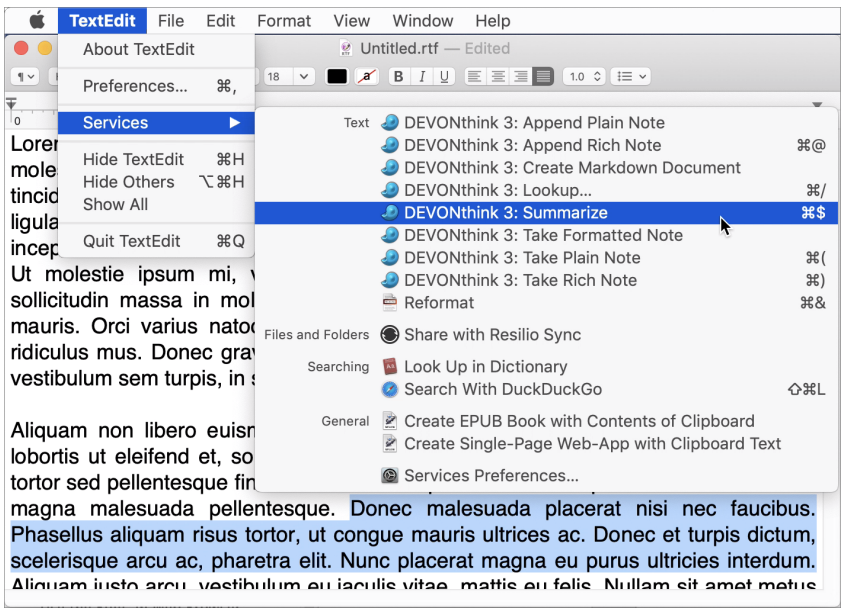


Figure 40: DEVONthink adds a bunch of commands to the system-wide Services menu. Those that apply to selected text appear here.

DEVONthink can add up to 10 commands to the various Services menus; all are prefixed with "DEVONthink 3":

- **Add to DEVONthink 3:** Imports the selected items (for example, in the Finder) to DEVONthink's default destination.
- **Capture Web Archive:** Applicable only to webpages; stores the current page in DEVONthink as a web archive.
- **Take Plain Note, Take Rich Note, Take Formatted Note, and Create Markdown Document:** Creates new documents in the selected format from the current text selection. (See Create Documents in DEVONthink for the distinctions among these formats.)
- **Append Plain Note and Append Rich Note:** Adds the selected text to the note most recently taken via a DEVONthink service.
- **Lookup:** Opens a new search window in DEVONthink, with the selected text filled in.
- **Summarize:** Creates a new note containing a summary of the selected text.

You can turn each service on or off individually, and customize its keyboard shortcut, as you prefer:

1. Go to System Preferences > Keyboard > Shortcuts > Services.
2. In the list on the right, navigate to the service you want to enable or disable, and check (or uncheck) its box. All of DEVONthink's services start with "DEVONthink 3," but they're found under various headings—Add to DEVONthink 3 is found under "Pictures," Capture Web Archive is found under "Files and Folders," and the others are all located under "Text."
3. Optionally, to add (or change) a keyboard shortcut for a service, double-click the space to the right of the service name and press your desired key combination.

The changes you make to services become available immediately.

> **Note:** There's also a mechanism called PDF Services that can be used to add documents to DEVONthink; see Use the PDF Menu, ahead.

Use the Sorter

Yet another way to add information to DEVONthink is to use a special panel called the Sorter. DEVONthink 2 also had a Sorter, but the way this tool appears and works in DEVONthink 3 is almost entirely different. The new sorter provides a way to add nearly any sort of content to the location of your choice in DEVONthink no matter what app you're using or what's on your screen—without switching to DEVONthink itself—as well as a way to search your open databases.

Unlike the old DEVONthink 2 Sorter, today's Sorter runs *only* when DEVONthink is open, and even then, only when you've enabled it. To turn on the sorter, go to DEVONthink 3 > Preferences > Sorter and choose either Show as Menu Extra (the default) or Show as Dock Tab from the Appearance pop-up menu; to hide it, choose None.

If you choose Show as Menu Extra, you'll see a new menu in your main menu bar called DEVONthink (if Text is selected next to Menu Extra Title in the Sorter preference pane) or with the nautilus icon (if Icon is selected). In either case, click that item on the menu to show the Sorter (**Figure 41**).

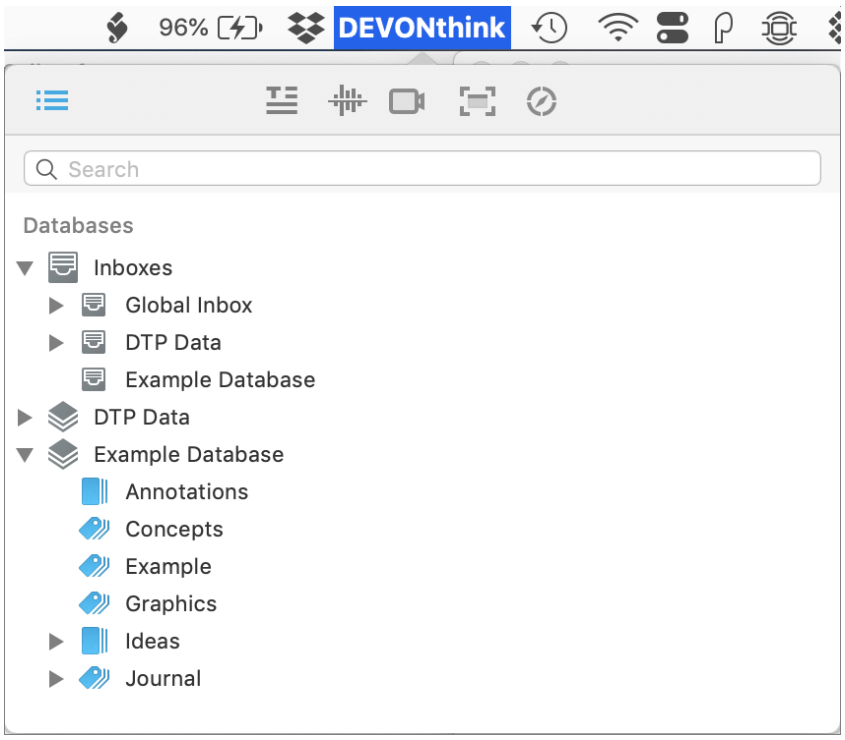


Figure 41: The Sorter as it appears on the main menu bar.

On the other hand, if you choose Show as Dock Tab, a translucent tab appears docked at the side of your screen; you can choose any of six locations for the docked tab by clicking a radio button on the Position display. Whichever spot you choose will display a gray tab that hovers over all other windows; when you click it, the Sorter slides out from that location (**Figure 42**). Click the tab again to hide the Sorter.

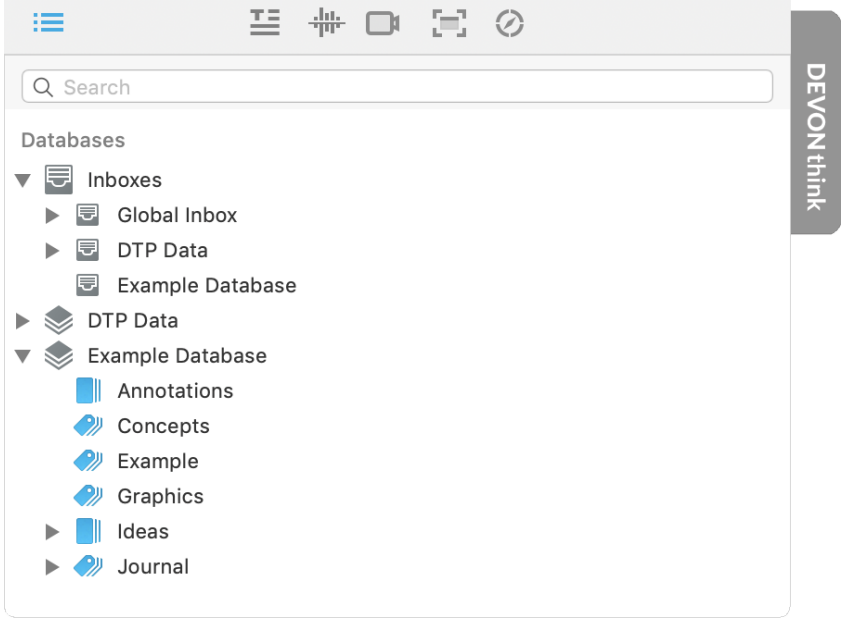


Figure 42: The Sorter as it appears when you click its docked tab.

Once you've displayed the Sorter (in either way), you can use it to perform quite a few different DEVONthink actions:

- **Add something to DEVONthink:** Drag a file, folder, or text selection to the Inbox or one of the group icons; or, if the Sorter is hidden, simply drag the item to the menu bar icon or tab itself, and when the Sorter slides open, drop the item onto your icon of choice.

- **Take a note:** To type a quick note into DEVONthink, open the Sorter and click the Take Note icon, type your note (optionally with name, URL, tags, and other metadata, and in your choice of format), choose a location, and click Add. (You can assign a keyboard shortcut to the Take Note action by going to DEVONthink 3 > Preferences > Sorter and clicking the Take Note Hotkey button.)

- **Copy the selection:** Similar to the Take Note feature (but without an icon in the Sorter) is the Copy Selection feature. Assign a keyboard shortcut to this action by choosing DEVONthink 3 > Preferences > Sorter and clicking the Copy Selection Hotkey field. Now, when you make a selection in any document and press that key combination, the Sorter opens with the selected text prefilled in the Body field.

> **Note:** The first time you do this, you may see an accessibility warning. If so, click Open System Preferences, which takes you to System Preferences > Security & Privacy > Privacy > Accessibility. Click the lock icon and enter your password. Then select the DEVONthink 3 checkbox and close System Preferences.

- **Record a voice or video note:** To store an audio note or video note in DEVONthink, click the Voice Note icon or Video Note icon on the Sorter's toolbar, respectively. Click the Record icon, pause for a second or so, and begin speaking. When you're finished, click the Stop icon, fill in the desired metadata, and click Add. (To change which camera or microphone is being used, use the pop-up menu next to the Record icon.)

> **Note:** To record audio or video, DEVONthink must be permitted to access your computer's microphone and/or camera. Go to System Preferences > Security & Privacy > Privacy > Microphone, and select DEVONthink in the list; select Camera in the list on the left and do the same.

- **Capture the screen:** To capture the contents of the screen as a DEVONthink document, click the Screen Capture icon on the Sorter's toolbar. Click Screen, Window, or Selection, as you prefer (optionally selecting "Include this window" to show the Sorter itself in the screenshot). If you select Window or Selection, next select the desired area and click the mouse button. Fill in the desired metadata and click Add.

- **Capture a web clip:** To capture the contents of a webpage, click the Web Clip icon on the Sorter's toolbar. Then click your default browser (to capture its frontmost tab or window), "URL on the clipboard" (to capture a URL you've previously copied), or "Enter manually" (to capture a URL you type in). Fill in the desired metadata and click Add. You can also assign a keyboard shortcut to capturing a web clip using the Sorter; choose DEVONthink 3 > Preferences > Sorter and click the Clip to DEVONthink Hotkey button.

Make the Sorter Tab Less Visible

If you want to use the Sorter in docked tab mode but find that gray tab too distracting, you can increase its translucency to the point that it's nearly invisible. To do this, go to DEVONthink 3 > Preferences > Sorter and uncheck Full (next to "Visibility"). Hover your pointer over the Sorter tab for a moment and move it away. From this point on, the tab then darkens only when you hover over it, and is just a faint image otherwise.

Use the Share Extension

Extensions give apps additional ways to talk to each other and exchange data. One type of extension, the Share extension, lets apps add commands to the Share pop-up menu (or, in some cases, a submenu of that menu) that appears in the Finder, most Apple apps, and a large number of third-party apps. By choosing a command from this menu, you can send the document, webpage, or other content you're currently viewing to another app or web service.

To add the DEVONthink Share extension to the Share pop-up menu in apps such as Safari and Notes:

1. Go to System Preferences > Extensions > Share Menu (or, alternatively, open an app that supports Share extensions, such as Safari, Preview, or Notes, click the Share button on the toolbar, and choose More from the pop-up menu). See **Figure 43**.

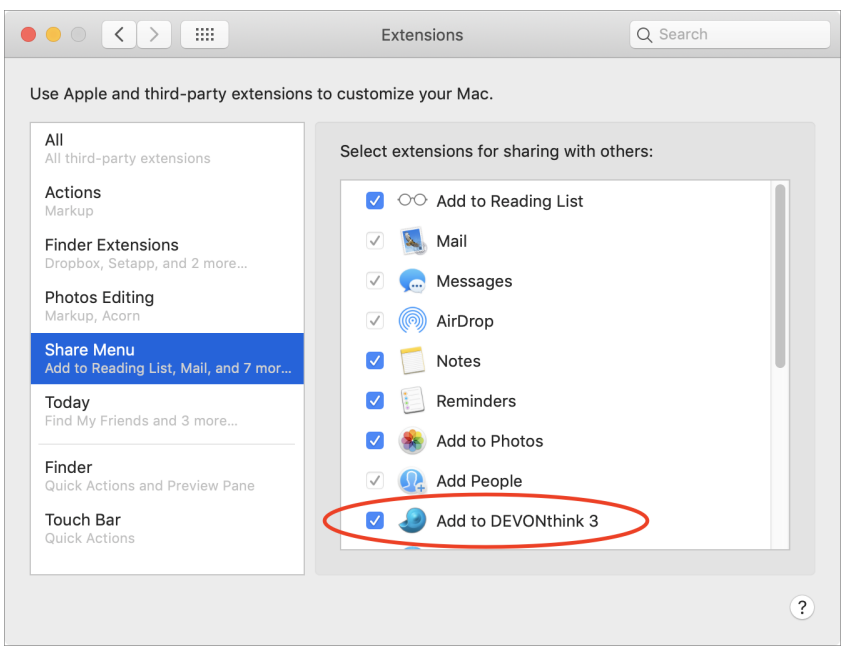


Figure 43: Select this checkbox to include the Add to DEVONthink 3 command on your Share menus.

2. Select the Add to DEVONthink 3 checkbox.

3. Close System Preferences.

Once you've done this, Add to DEVONthink 3 appears on the Share menu in every app that includes one. To capture information into DEVONthink from that app, choose Share > Add to DEVONthink (keeping in mind that the command may be on a submenu). If the Sorter is enabled, a note appears with the selected information filled in; if the Sorter is

disabled, a similar-looking Take Note window appears. Either way, fill in the desired information and click Add (in the Sorter) or Save (in the Take Note window).

> **Note:** DEVONthink has its own Share pop-up menu; see Share Data.

Add Web Content

Although several other options discussed in this chapter work for web content, DEVONthink also provides two web-specific options for adding webpages to DEVONthink:

- Clip to DEVONthink Browser Extension: This extension works in Safari, Chrome, and Firefox. Once installed, you can simply click the Clip to DEVONthink button to add the entire webpage. You'll be able to choose from variety of formats for storing the page, including rich text, HTML, PDF, or only the bookmark.

- Web Bookmarklets: This option may be right for you if you're using a browser for which there's no Clip to DEVONthink extension. But regardless of your browser, a bookmarklet may be the fastest way to add a webpage: there's an individual bookmarklet for each format, so if you know what you want, adding a page to DEVONthink can be a one-click operation. (There is also a bookmarklet that works the same as the Clip to DEVONthink browser extension, allowing you to choose the format you want each time—but that takes more clicks.)

> **Note:** DEVONthink also has a built-in web browser and can act as an RSS reader; for more about those features, skip ahead to Use the Built-in Web Browser and Read RSS Feeds.

Clip to DEVONthink Browser Extension

When you install DEVONthink, it automatically adds a Clip to DEVONthink extension to Safari (though you still have to enable it in Safari by going to Safari > Preferences > Extensions and selecting the Clip to DEVONthink 3 checkbox). You can also optionally add the extension to Chrome or Firefox. To do so, choose DEVONthink 3 > Install Add-ons; select one or both of Google Chrome Extension and Firefox Extension, and click Install. Then switch to the browser(s) in question and follow the prompts to complete the installation process.

To capture a page while you're browsing, click the Clip to DEVONthink button. If the Sorter is enabled, it appears; otherwise, the Clip to DEVONthink window (**Figure 44**) appears. Either way, you see the same options.

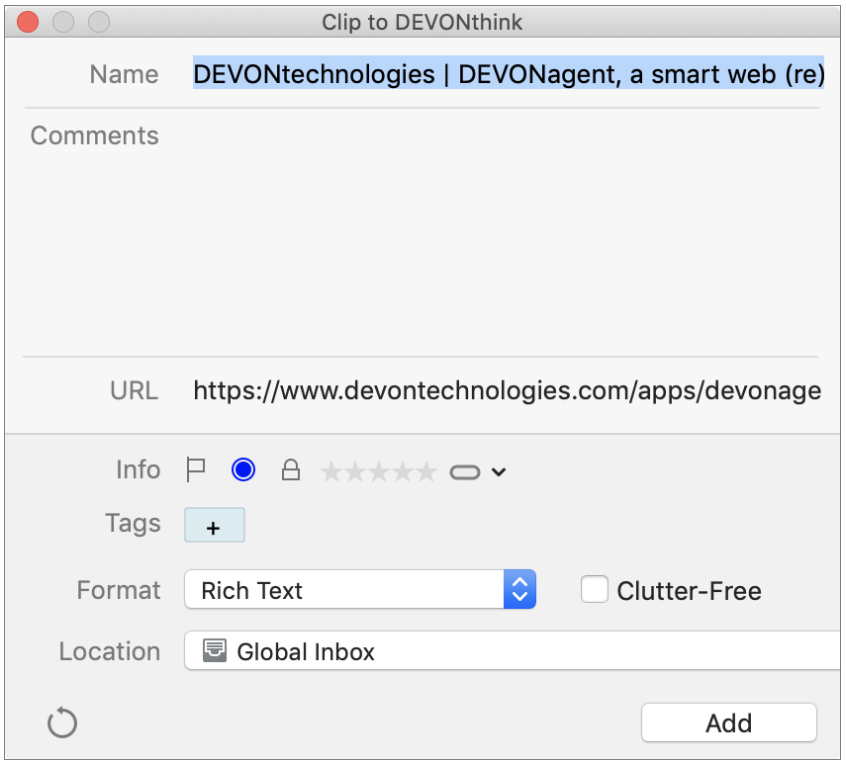


Figure 44: When you use the Clip to DEVONthink browser extension or bookmarklet, you can add a note, enter tags, and choose a format here.

You can then simply click Add (to accept all the defaults) or make changes first—everything is optional, including additions or changes to the Name and URL fields, comments, tags, and other metadata. (In most browsers, though not Safari 13, any selected text on the webpage is prefilled into the Comments field.) You can also choose a location from the Location pop-up menu at the bottom of the window. Of special note, however, is the variety of formats you can choose from the Format pop-up menu (as we've seen elsewhere in DEVONthink):

- **Plain Text:** Saves the entire page or the selected text as plain text.
- **Rich Text:** Saves the entire page, including text styles, as rich text.
- **Bookmark:** Saves only the page's URL.
- **Formatted Note:** Saves the document, including text styles, as a formatted note.
- **HTML Page:** Saves the HTML source of the page (without graphics).
- **Markdown:** Saves the entire page (even if you have text selected) as Markdown. This will produce only an approximation of the original formatting.
- **Web Archive:** This choice, the default, saves the page's entire contents (including any graphics) as a web archive, which lets you view it again in its current state even if you're offline (or if its content changes later).
- **PDF (One Page):** Saves the entire webpage as a (perhaps very long) single-page PDF.
- **PDF (Paginated):** Saves the entire webpage as a PDF with page breaks.

Of these formats, I tend to go with PDF (One Page), which is more compact and universal than a web archive, and yet faithfully reproduces what the webpage looked like when I captured it.

Whichever format you choose, you can also optionally select the Clutter-Free checkbox to save the page in an uncluttered and nicely readable format—without ads and most other distractions.

Once you've selected the location and format you want, and entered any tags or a note if you want them, click Add to save the page.

Web Bookmarklets

Another way to get web content into DEVONthink is *bookmarklets*—special strings of text that your browser sees as bookmarks, but which contain JavaScript code that let them perform interesting tasks.

DEVONthink offers eight bookmarklets, each of which stores data in a different way. The most versatile of these is Clip to DEVONthink, which works exactly like the Clip to DEVONthink browser extension I described just above.

The other seven bookmarklets capture content to your default destination in a single, specific format, with no extra options. The Archive, Bookmark, HTML, PDF, and PDF (Paginated) bookmarklets operate just as their counterparts in Clip to DEVONthink do. To save just selected text from a page as a (plain text) note, choose the Selection bookmarklet. To save *all* the text from the current page as a note, choose the Text bookmarklet.

To install the bookmarklets, follow these steps:

1. Open the browser you want to use, and go to the DEVONtechnologies Handbooks and Extras page.

2. Make sure your Favorites (or Bookmarks) bar is visible. If not, then in Safari, choose View > Show Favorites Bar; in Chrome, choose View > Always Show Bookmarks Bar; or in Firefox, choose View > Toolbars > Bookmarks Toolbar.

3. Under the page's Bookmarklets heading, drag the Drag to Bookmarks button next to Clip to DEVONthink directly onto the Favorites (or Bookmarks) bar. Repeat, if desired, with any or all of the other bookmarks.

4. If you prefer all your DEVONthink bookmarklets to be grouped in a folder on your Favorites (or Bookmarks) bar, use your browser's bookmark editing tools to create a folder and drag the bookmarklets to that folder.

(If you use a different browser, the steps should be similar; if in doubt, check the browser's documentation for how to install bookmarklets.)

Once the bookmarklets are installed, using them is a simple matter of clicking the bookmarklet's name (or choosing one of the bookmarklets from the a pop-up menu) on your Bookmarks bar (**Figure 45**).

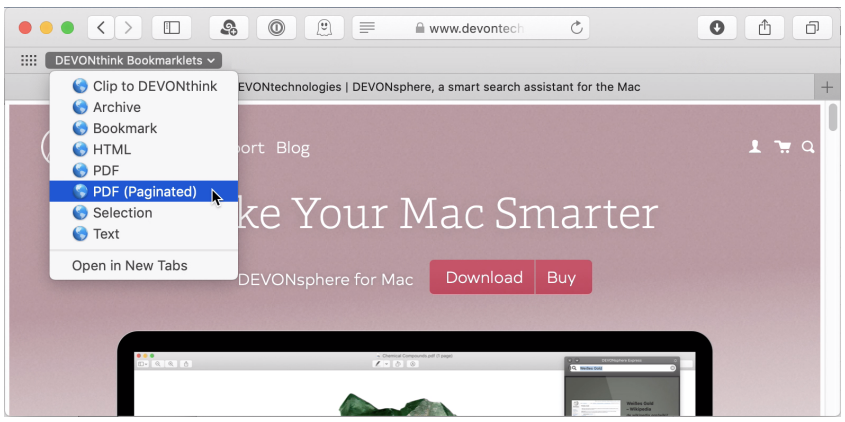


Figure 45: Use bookmarklets to grab web content from a browser.

Using DEVONagent Pro with DEVONthink

DEVONtechnologies makes a standalone web browser (well, they'd refer to it as "an internet research application with a built-in web browser") called DEVONagent Pro ($49.95), which excels at massively complex web searches and filtering, summarizing, and mapping connections among the resulting data. It's more than the average person needs for casual browsing, but for serious research, it's a powerful tool.

When browsing in DEVONagent Pro, there's no need for bookmarklets or extensions, because the program has built-in links to DEVONthink. Just go to the Data menu and choose the format you want from the Add to DEVONthink section—Resource (such as HTML content or image), Bookmark, Rich Text, Summary, Formatted Note, Markdown, PDF (One Page), PDF (Paginated), Web Archive, or "via Clip to DEVONthink" (if you want to add a note or specify other details). DEVONagent Pro can also maintain its own archive, and later transfer documents from the archive into DEVONthink in any of these formats.

Add Email Messages

You can easily add individual email messages—or even thousands of messages at a time—to DEVONthink. Of course, there's nothing wrong with keeping email messages in your email client, but DEVONthink offers interesting advantages for at least some of your messages:

- You can store correspondence about a project with related files.
- You can use all of DEVONthink's organizational features (replicants, tags, See Also, etc.) with your email messages, which probably goes far beyond what your email client offers.
- You can use DEVONthink's fast and flexible searching.

Note: Email archiving requires DEVONthink Pro or Server.

You can import your messages into DEVONthink manually by drag and drop, but there are several automated ways: you can use the Import sidebar (described next) or the Import

menu command, or you can Use the Mail Plugin (or Use the Mail AppleScripts) with Apple Mail or Use the Outlook AppleScripts.

> **Note:** If you use MailTags (part of the MailSuite plugin for Apple Mail), tags you applied to messages using MailTags are imported, along with the messages, as DEVONthink tags. See Tag Documents for more on tags.

Import Messages Using the Import Sidebar

The easiest way to import email messages in bulk—if you're using Apple Mail, Microsoft Outlook, or Microsoft Entourage—is to use the Import sidebar. Follow these steps:

1. At the top of the sidebar, click the Import icon (or choose View > Import).

> **Note:** In some situations, clicking that icon may cause your email client(s) to open, if they're not already open.

2. If no email clients appear under the "Emails" heading, hover over it and click Show. DEVONthink should then display any of the supported clients you have installed.

3. Select a client name (such as Apple Mail). Depending on how many mailboxes and messages you have, it may take a few moments or more for DEVONthink to refresh its display.

> **Note:** If this doesn't work for you, make sure the Mail plugin is installed; see Use the Mail Plugin.

   DEVONthink shows each account and mailbox in the selected client(s); the number of messages in each one appears to its right. When you select a mailbox, its messages appear in a table view.

4. Select an account or mailbox, or one or more individual messages. In the Email inspector (**Figure 46**) that appears on the right, you can use the Search field, Show pop-up menu, and checkboxes to filter the display of the selected account or mailbox.

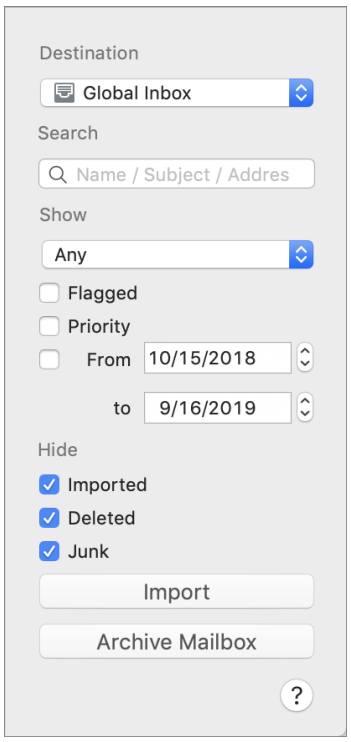


Figure 46: The Email inspector lets you filter messages and set options for importing email.

5. Select a destination for the imported messages from the Destination pop-up menu.

> **Note:** If you want DEVONthink to make its best effort to preserve message threads, go to DEVONthink 3 > Preferences > Email and select "Group conversation threads" before importing email. But be aware that DEVONthink may be unable to group messages the same way your email client does.

6. Click the Import button to import only the messages selected in the table view—or, if no messages are selected, all the messages currently visible in the table view. *Or*, to import the entire selected mailbox (or account), click the Archive Mailbox button.

Individual messages are stored at your chosen location in a group bearing the name of their mailbox. Archived mailboxes, on the other hand, are stored in a hierarchy of groups that includes the name of the account and client, and that is, in turn, contained in an Emails group.

Import Unix Mailboxes

If you use Thunderbird or another email app (besides Mail, Outlook, or Entourage) that stores its messages in standard Unix mailbox (`.mbox`) format, you can choose File > Import > Unix Mailbox, navigate to the `.mbox` file, and click Open to import the messages as a group in your current location. Alternatively, you can drag an `.mbox` file onto the DEVONthink icon in the Dock. (This command also works on `.mbox` packages exported by Apple Mail.)

Use the Mail Plugin

If you use Apple Mail, you can also send one or more selected messages to DEVONthink from within Mail, making it easy to archive particular messages (as opposed to entire

mailboxes or large sets of messages) as you work.

Before you can do this, you must make sure DEVONthink's Mail plugin is installed. In Mail, select a message, pull down the Message menu, and look for a command called Add to DEVONthink 3. If it's not there, quit Mail, open DEVONthink, choose DEVONthink 3 > Install Add-ons, check Apple Mail Plugin, and click Install. Then reopen Mail. (If this is your first time using the DEVONthink plugin in Mail, there's an extra step: go to Mail > Preferences > General > Manage Plug-ins, select DEVONthink.mailbundle, and click Apply and Restart Mail. You may also be prompted to grant DEVONthink Full Disk Access in System Preferences > Security & Privacy > Privacy > Full Disk Access if you have not previously done so.)

To use the plugin, simply select one or more messages and choose Message > Add to DEVONthink 3 (⌘-Control-Option-M). DEVONthink imports the message(s), storing them in the location specified in your preferences. You can also add the entire contents of the currently selected mailbox to DEVONthink with ⌘-Control-Option-Shift-M, but do so carefully, as you might end up importing a vast number of messages unintentionally.

Use the Mail AppleScripts

Although the Mail plugin and its associated menu command provide the easiest way to import Mail items into DEVONthink, there's another option in case you have more specific needs: AppleScript.

The scripts are found on the *system-wide* Script menu, which should appear among the little icons on the right side of your menu bar. If you don't see it there, open the Script Editor utility (found in `Applications/Utilities/`), choose Script Editor > Preferences, and select "Show Script menu in menu bar." (You can then quit Script Editor.)

When you're running Mail, five DEVONthink-specific scripts appear at the bottom of the Script menu, all of which are self-explanatory and apply to whatever is currently selected:

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

The Mail Rule AppleScripts

Besides AppleScripts that run from the system-wide Script menu and Mail's Script menu, DEVONthink also includes several scripts you can use as actions in Mail rules, such that when messages match your rule's criteria, DEVONthink performs certain activities, such as adding the message and/or its attachments to your database. (Note that one of these scripts, "Mail Rule - Add links to DEVONthink," requires DEVONthink Pro or Server.)

To use them, go to Mail > Preferences > Rules, click Add Rule, and set up a condition (such as matching a sender or subject). Then choose Run AppleScript for the action, and choose one of the scripts beginning with "Mail Rule."

Use the Outlook AppleScripts

If you use Microsoft Outlook for email, you can also send messages or mailboxes to DEVONthink without leaving your email client. In this case DEVONthink relies on AppleScripts to do its thing.

The scripts are found on the system-wide Script menu on the right side of your menu bar. If you don't see it there, open the Script Editor utility (found in `Applications/Utilities/)`, choose Script Editor > Preferences, and select "Show Script menu in menu bar." (You can then quit Script Editor.)

When you're running Outlook, two DEVONthink-specific scripts appear at the bottom of the Script menu, both of which are self-explanatory:

- Add Mailbox to DEVONthink
- Add Message(s) to DEVONthink

Select the mailbox(es) or message(s) you want to import, and then choose the appropriate script from the menu.

Work with Imported Messages

When you view an imported email message in DEVONthink, it looks much like the original —generally, including headers and any text styles. However, URLs in plain text messages may not initially be clickable links, and certain attachments may not appear. If this happens, switch from the default preview mode to text-only mode by choosing View > Document Display > Text Alternative (⌘-Control-X) or clicking the Text button on the navigation bar.

You can do nearly all the same things with imported email messages that you can with other DEVONthink documents. You can also do one extra thing: reply to the message! To reply, choose Data > Send Reply. DEVONthink switches to your default email client and opens a new message window, pre-addressed to the sender of the selected message, with the message contents quoted in the window.

Use the PDF Menu

Every Mac app that can print also has the capability to create PDF files. One common use of this feature is saving PDF copies of webpages with purchase confirmations in your `~/Documents/Web Receipts` folder; another is attaching PDF copies of documents from any program to email messages.

The commands used to send PDF files of the current document to various locations are found in the PDF pop-up menu at the bottom of every Print dialog (**Figure 47**).

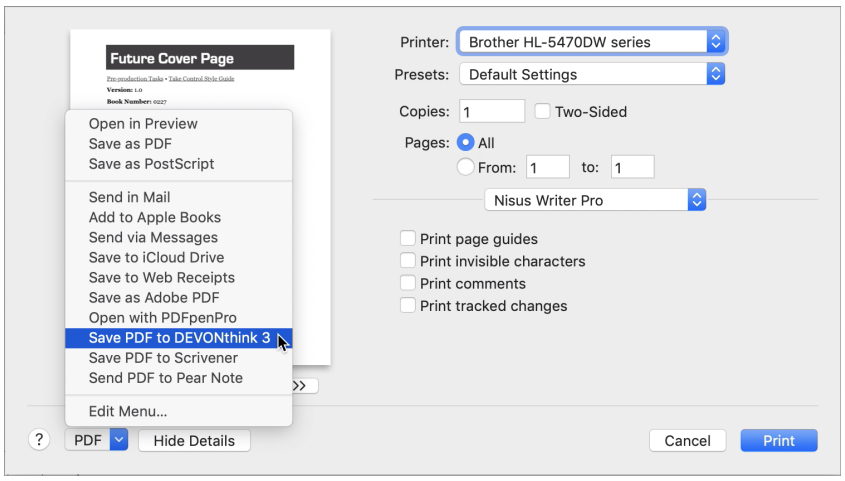


Figure 47: In any Print dialog, choose Save PDF to DEVONthink 3 from the PDF pop-up menu to add a PDF of the current document to DEVONthink.

DEVONthink adds a command to this menu: Save PDF to DEVONthink 3. Choose File > Print followed by this command to save anything printable directly to DEVONthink as a PDF. (I use this capability all the time for web receipts, because it's just as easy as choosing Save PDF to Web Receipts Folder but has the benefit of putting the item with all my other financial info in DEVONthink.)

Scan Documents

DEVONthink makes a great place to keep digital copies of paper documents, and if you have a scanner, chances are excellent that DEVONthink's integrated scanner support will enable it to talk to your scanner directly, rather than forcing you to scan into a separate app and then import each document into DEVONthink.

> **Note:** Although any edition of DEVONthink can communicate with a scanner, only DEVONthink Pro and Server include OCR capabilities and the Import sidebar.

Generally speaking, scanned *documents* (as opposed to scanned pictures) are stored in PDF format. A PDF file can contain both a bitmapped image of the scanned document (such that if you were to print it, it would look just like the original) and an invisible layer with the document's text, which can be indexed, searched, selected, copied, annotated, and so on. DEVONthink Pro and Server can perform optical character recognition (OCR) on the scanned image—automatically or manually—to add the searchable text layer; or if you

prefer, you can use another app to do that. (ABBYY FineReader Pro, Acrobat Pro, PDFpenPro, ReadIRIS Pro, and numerous other Mac apps can do this; your scanner may even have included bundled OCR software.)

Depending on what scanner you have, what software it comes with, and how the hardware and software are set up, you may be able to use either of two methods to get scanned documents into DEVONthink:

- **Scanner-initiated:** You load a document into your scanner's sheet feeder and press a button. As soon as the document is scanned, your scanner's software sends it directly to DEVONthink, which can then (if you like) automatically perform OCR. (In a variation of this method, the scanner's software performs the OCR and then sends the document to DEVONthink.) This is my preferred method, because it's the simplest, and it works well with dedicated document scanners such as Fujitsu's ScanSnap series.

> **Note:** Do *not* set your scanner's software to save documents to the system-wide global Inbox, as that will lead to undesirable results. Rather, direct the output to the DEVONthink 3 app.

- **User-initiated:** You place a document in your scanner (typically, a flatbed scanner) and then, in DEVONthink, click the Import icon in the sidebar (or choose View > Import) and select your scanner under Devices. (If you don't see Devices, hover over the Image Capture label and click Show.) You can then make any desired changes to the settings and initiate the scan. As long as your scanner or digital camera works with Image Capture, it should work here. This option avoids the need to launch any external app. I say more about this ahead, in Pull an Image from a Scanner or Camera.

> **Tip:** When you launched DEVONthink 3 for the first time, you should have been prompted to install the optional ABBYY FineReader software, which provides OCR capabilities. If you didn't install it previously, do so now—OCR won't work without it. To do so, choose DEVONthink 3 > Install Add-ons, check ABBYY FineReader OCR, click Install, and follow the prompts.

> **Tip:** If you already have scanned documents on your disk and you simply want DEVONthink to perform OCR to make them searchable, see the tip Perform OCR on Documents in Your Database.

Because scanning involves so many variables—and because DEVONthink's built-in help does such a nice job of covering all the steps to take in various situations—I'm not going to provide detailed instructions for every scanner here.

> **Tip:** Make sure to set your scanner's resolution to at least 300 dpi. At lower values, DEVONthink's OCR quality suffers. (Conversely, over 600 dpi, file size increases dramatically without much improvement in accuracy.) In my tests, 300 dpi provided the best combination of image quality, OCR accuracy, and file size.

I do, however, want to call your attention to a few key scanning topics.

Use a Fujitsu ScanSnap

Fujitsu's ScanSnap scanners make an especially good match for DEVONthink Pro Office, and they require only a few quick setup steps. The short version is: open the ScanSnap Home app and set DEVONthink as the destination for new scans. (For all the details, see this post on the DEVONtechnologies blog.)

After that one-time setup, simply pop one or more documents in your ScanSnap, press the button, and wait a few moments (depending on document length and your settings) for the scanned, searchable PDF to show up in DEVONthink.

> **Note:** In a surprise move, after claiming it wouldn't happen, Fujitsu in July 2020 released 64-bit, Catalina-compatible ScanSnap Manager software supporting both newer scanners and several now-discontinued scanner models, such as the S1100, S1300, S1500, and S1500M. If you have an older scanner that isn't supported by any current Fujitsu software and want to use it with DEVONthink, you may be able to do so using ExactScan (mentioned next).

Use ExactScan

ExactScan is software that enables many PC document scanners to work on a Mac—and even supports older Mac document scanners. If you have ExactScan installed and a compatible scanner, DEVONthink can interact with it in almost exactly the same way as with a Fujitsu ScanSnap (described just previously). If you have ExactScan installed, go to DEVONthink 3 > Install Add-Ons, select "Install Avision ExactScan Support" and click Install to configure ExactScan to send scans directly to DEVONthink.

Pull an Image from a Scanner or Camera

If you have a Fujitsu ScanSnap or another document scanner that can be configured to "push" scanned images directly to DEVONthink, you'll enjoy the convenience of being able to scan and import documents in a single step, merely by pressing a button on your scanner. However, if you have a scanner (or digital camera) that expects all scans to be initiated from within an app on your Mac, you can still "pull" documents from it into DEVONthink.

> **Note:** This feature requires DEVONthink Pro or Server.

Follow these steps:

1. Click the Import icon in the sidebar (or choose View > Import) and select your scanner under Devices (**Figure 48**). If necessary, wait for it to warm up.

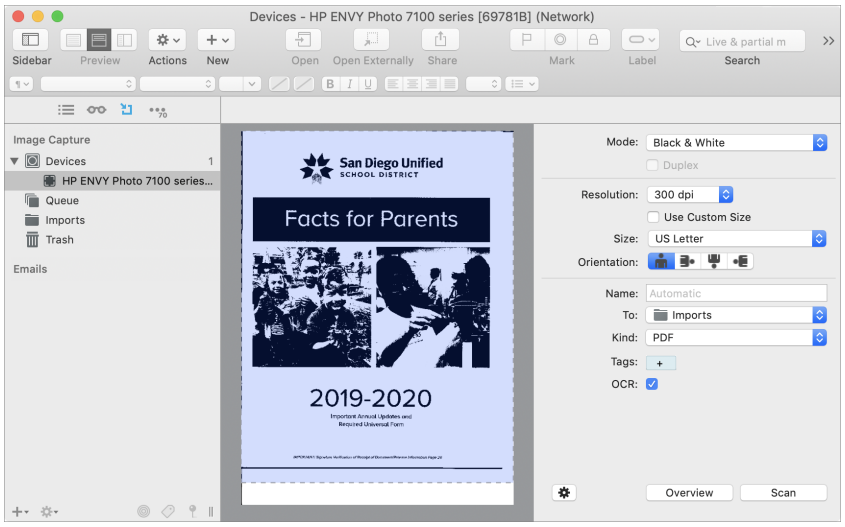


Figure 48: Use this view to control your scanner from within DEVONthink.

2. Your scanner may automatically display a preview image; if not, click Overview to capture one.

3. In the inspector on the right, set your desired preferences, including the location to which scanned documents will be saved. If you want DEVONthink to perform OCR on the newly scanned document, select the OCR checkbox.

4. Click Scan.

DEVONthink stores the image in the location you chose.

Configure OCR Preferences

If your scanner's software doesn't perform OCR itself, you can have DEVONthink automatically convert documents to searchable form as soon as a scan is complete. To set up DEVONthink's OCR preferences (which also apply when you manually convert documents to searchable PDFs), go to DEVONthink 3 > Preferences > OCR (**Figure 49**).

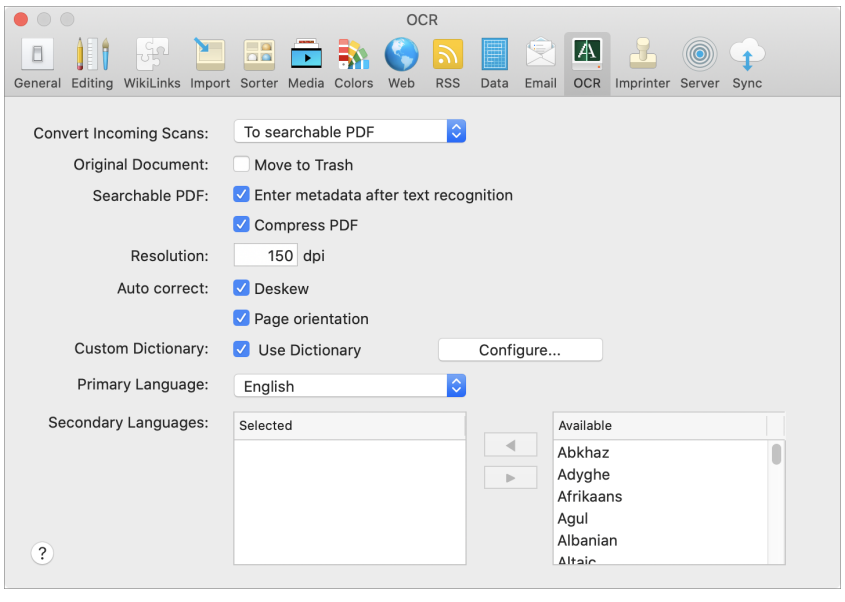


Figure 49: Set preferences for both automatic and manual OCR in this preference pane.

Your options, along with my suggestions, are as follows:

- **Convert Incoming Scans:** Choose “to Searchable PDF” to make DEVONthink perform OCR automatically on all scans initiated from within DEVONthink or sent to DEVONthink by known scanning software (such as ScanSnap Home, ExactScan, and as of DEVONthink 3.0.4, Brother’s iPrint & Scan) and save the document as a searchable PDF. That’s the most common use case and my recommendation for most people. However, DEVONthink 3 supports additional formats—you can also choose “To RTF document,” “To Word document,” or “To Web Archive” to save the scanned and OCR’d document in one of those more readily editable (if less visually accurate) formats. Starting with DEVONthink 3.5, you can also choose “To Comment” or “To Annotation” to add the recognized text as metadata in either of those formats, without changing the original document.

  If you choose No Action, the scans will still be imported into DEVONthink, but only as bitmapped images. (You can do OCR later, however; see the tip Perform OCR on Documents in Your Database, ahead.)

- **Resolution:** Set the resolution of the image layer in the PDF by entering a number from 150 to 300 (dpi).

- **Original Document:** If you check Move to Trash, after DEVONthink creates a searchable PDF, it moves the original scan (with just the bitmapped image) to the Trash—in this case, the Finder’s Trash, not DEVONthink’s. In most cases, that’s probably what you want, because otherwise you’ll end up with two copies of every scanned document.

- **Searchable PDF:** If “Enter metadata after text recognition” is checked, as it is by default, then every time you scan a document into DEVONthink, the app displays a dialog (**Figure 50**) in which you can enter a title, subject, tags, and other metadata. A scrollable preview of the document, on the left, helps you remember what’s in it—handy if you’re scanning a large stack of documents at once.

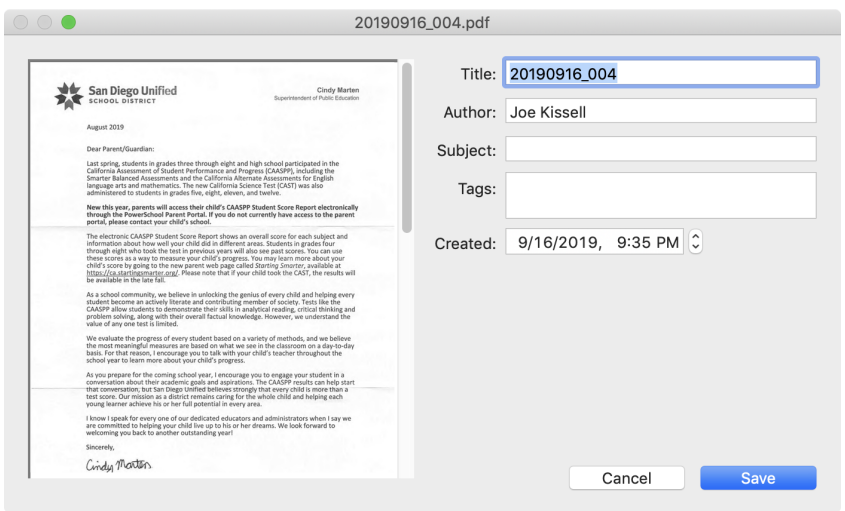


Figure 50: To name and tag scanned documents as the text is recognized, select “Enter metadata after text recognition” in the OCR preference pane, which results in this dialog appearing after each scan.

If you don't enter this data as you scan, you'll end up with files with unhelpful names like "20190916_004" and no tags. On the other hand, if you're scanning lots of documents at once, stopping what you're doing every minute or two to enter document details can be a drag. Because I usually scan only one or two documents at a time, I find it most effective to leave this box checked.

If you leave Compress PDF checked, as it is by default, DEVONthink performs lossless compression on the PDF, which is a good thing as the file takes up less disk space.

- **Custom dictionary:** If you scan documents that may contain unusual words that wouldn't be found in DEVONthink's built-in dictionaries, you can add your own custom dictionary (which is simply a word list) to improve recognition accuracy. To do this, select Use Dictionary, and then click Configure to choose your language and enter your list of words.

- **Primary Language:** Choose the language that most of your documents will be in (presumably English if you're reading this book).

- **Secondary Languages:** If you expect to scan documents in any language other than the primary language, select each of those languages in the Available list and click the left arrow button to add them to the Selected list. (I put French in this list, because many of the documents I scan are in French.)

Import Previously Scanned Documents

If you have a bunch of scanned documents that don't already have a searchable PDF text layer, DEVONthink (Pro or Server) is happy to import them and perform OCR after the fact. These images need not have come from a scanner as such—even photos or screenshots can be used, although accuracy depends on resolution, sharpness, contrast, and other factors.

To import images and convert them to searchable PDFs, follow these steps:

1. Choose File > Import > Images (with OCR).

2. Navigate to the folder where the images are stored. Select one or more files (⌘-click to select multiple files).

3. To set additional options, click the Options button:

    a. To move the original file *in the Finder* to the Trash after DEVONthink imports it, check "Move original to trash"; to leave the original in place, uncheck the box.

    b. If you want the documents to be converted to a format other than PDF, choose the format you want (RTF, Word, or web archive) from the Convert pop-up menu.

4. Click Open.

DEVONthink now imports the selected files, performs OCR, and (depending on your preferences) may prompt you for titles and other metadata.

Perform OCR on Documents in Your Database

What if you have a scanned PDF or other graphic that's already in DEVONthink but isn't yet searchable? No problem. Select one or more documents in DEVONthink and choose Data > OCR > to Searchable PDF. DEVONthink recognizes the text and, if Move to Trash is checked in DEVONthink 3 > Preferences > OCR, moves the original bitmapped image to the Trash. (The Data > OCR menu also contains commands for converting documents to RTF, Word, and web archive formats, and for adding recognized text as comments or annotations—leaving the original document unchanged.)

Import from Bookends

DEVONthink Pro and Server also support importing bibliographic information from Bookends. To do this, choose File > Import > References from Bookends. DEVONthink imports Bookends references as rich text documents and stores them in a group called "Bookends." If your Bookends items included keywords, those appear in the Document Properties of the documents; you can convert them to DEVONthink tags by selecting the document(s) and choosing Data > Tags > Convert Keywords to Tags.

Use the Built-in Web Browser

DEVONthink includes Apple's WebKit, the same rendering engine Safari uses to display webpages. So a webpage viewed in DEVONthink should look the same as it would in Safari. The difference is that even though you can store bookmarks, follow links, use multiple tabs, and click previous/next page buttons, DEVONthink treats each page as a separate (dynamic) document. That means (among other things) there's no editable address bar—only the URL of the current page. So even though DEVONthink can show you the contents of webpages, it's not so much a *browser* (that is, it doesn't facilitate random browsing) as a tool that can fetch, render, and store webpages.

There being no address bar, how do you open a webpage in the first place? Choose Script > Tabs > Open Location…, enter a URL, and click OK. DEVONthink then displays the resulting webpage as an ordinary document (**Figure 51**).

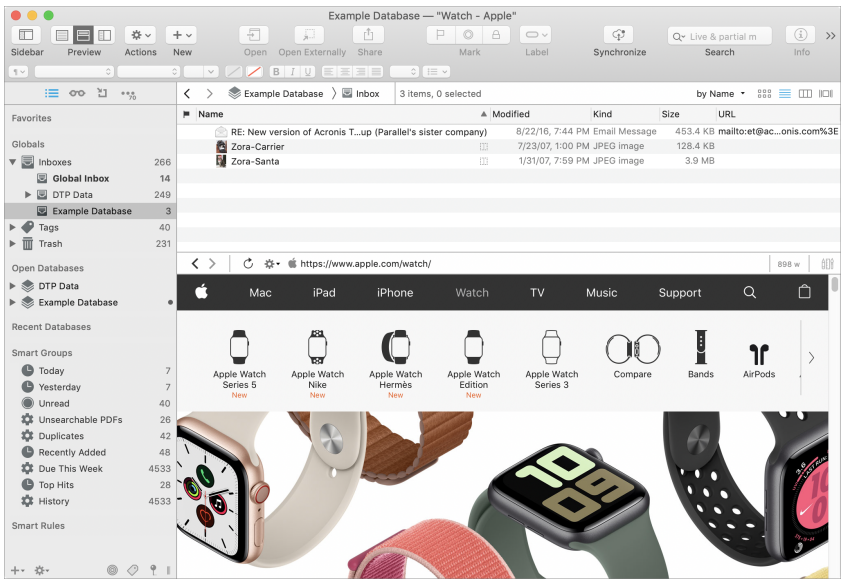


Figure 51: You can display any webpage in DEVONthink as though it were a regular document.

Having found a webpage you like, you can add it to your database if you want to save it. To do so, use one of the following commands on the Tools > Capture submenu (most of which mirror those used by the Clip to DEVONthink Browser Extension):

- **Bookmark:** Stores a bookmark for the page—that is, a document containing only its URL. When you select this bookmark in your database, DEVONthink attempts to connect to the site to download and display the page, in whatever state it's in at that point. Alternatively, you can capture the address by choosing Data > New > Bookmark. (Or, drag the page's address from the navigation bar onto a group or tag.)
- **Rich Text:** Stores the page as a rich text document.
- **Formatted Note:** Stores the page as a formatted note.
- **Markdown Text:** Attempts to store an approximation of the page's content formatted as Markdown, though actual results are highly variable based on the page design.
- **HTML Page:** Stores the webpage as an HTML file.
- **Web Archive:** Stores the page and any associated media as a web archive.
- **PDF (One Page):** Stores the page as a (non-paginated) PDF file.
- **PDF (Paginated):** Stores the page as a paginated PDF file.

> **Note:** If Clutter-Free Layout is selected on the Tools > Capture submenu when you choose one of the above options other than Bookmark, DEVONthink attempts to remove ads and other non-article content when saving the page.

- **Clip to DEVONthink:** Displays the Clip to DEVONthink dialog (see Clip to DEVONthink Browser Extension), which lets you choose a format, change the name, add tags, and so on.

Downloading and Importing an Entire Site Automatically

To download and import an entire website (available only in Pro and Server editions), choose File > Import > Website, enter the URL, and click OK. Then, in the Download Manager panel, select the site, click the actions ⚙ icon, and choose Download To > *Database Name* or Global Inbox (that is, anything except Folder) from the pop-up menu. Go back to that pop-up menu, choose Options, and select your preferences. (For details on the available options, consult the DEVONthink documentation.) Finally, click the Start button.

Be aware that downloading an entire site may take an extremely long time and use an appalling amount of disk space—so use this feature with caution.

DEVONthink doesn't attempt to be a full-featured browser, but it does offer a few common browser features—if you know where to find them:

- **Tabbed browsing:** DEVONthink can open multiple browser tabs in a single window or the view/edit pane, but to use this capability, you must first turn it on—go to DEVONthink 3 > Preferences > General and check "Enable tabbed browsing." (If you want the tab bar to be visible even when just one webpage is open, also check "Always show tab bar.")

  Thereafter, to open a link in a new tab, ⌘-click it (to keep the tab in the background) or ⌘-Shift-click it (to switch to the new tab).

  You can switch to a particular tab by clicking it or close it by clicking its close × icon; you can also press ⌘-Shift-] to move to the next tab or ⌘-Shift-[to move to the previous tab. You can't, however, rearrange tabs within a window.

Tabbed Browsing Isn't Just for Webpages!

With tabbed browsing on, the same behavior in DEVONthink applies to links in PDF and rich text documents—as do the previous/next page controls. In fact, you can open any number of documents, of any kind, in separate tabs (select the documents, hold down the Option key, and choose Data > Open in Tabs, ⌘-Option-O). However, tabbed browsing in DEVONthink is far less advanced than what you'll find in a modern web browser, and depending on how you use the app, you may find tabs to be more cumbersome than separate windows.

- **Previous/next page:** To move to the page you previously visited in the current window, view/edit pane, or tab, press ⌘-[or click the Go Back ‹ icon on the navigation bar; to move forward to the next page, press ⌘-] or click the Go Forward › icon.

- **Reload:** Right-click (or Control-click) anywhere on the page and choose Reload from the contextual menu; or click the Reload ↻ button on the navigation bar.

Read RSS Feeds

Just as DEVONthink can display individual webpages as documents, it can grab all the articles from an RSS (or Atom, RDF, or JSON) news feed, treating each article as a separate

document and displaying its contents using the same WebKit rendering engine.

To add a feed, navigate to the location where you want to store it and choose Data > New > Feed. In the dialog that appears (**Figure 52**), enter the feed's URL (which usually begins with either `feed://`, filled in by default, `https://`, or `http://`), optionally type one or more tags (pressing Tab after each one) and enter a name if you want to override the feed's default name, and click Add. DEVONthink connects to the feed and downloads its current articles.

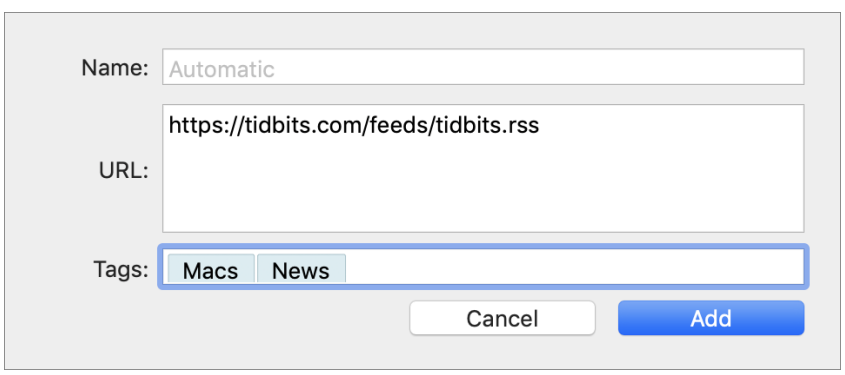


Figure 51: Enter a feed's URL and any tags you want to apply to it in this dialog.

Tip: You can put feeds anywhere, but if you plan to use DEVONthink for most of your feed reading, I suggest making a new group called Feeds at the top level of your database and putting your feeds there.

Note: DEVONthink can also display Twitter feeds as RSS. Choose Data > New > Twitter Feed > Other and enter the Twitter username after the prefilled text—for example, `feed://twitter.com/joekissell`.

To read an article in a feed, select the article under the feed name (**Figure 53**); doing so marks it as read. To manually change an article's read status, select it and choose Data > Mark > As Unread (or As Read), or press ⌘-K. (These commands are also available on the Mark submenu of the Actions ⚙ pop-up menu and the right-click/Control-click contextual menu.)

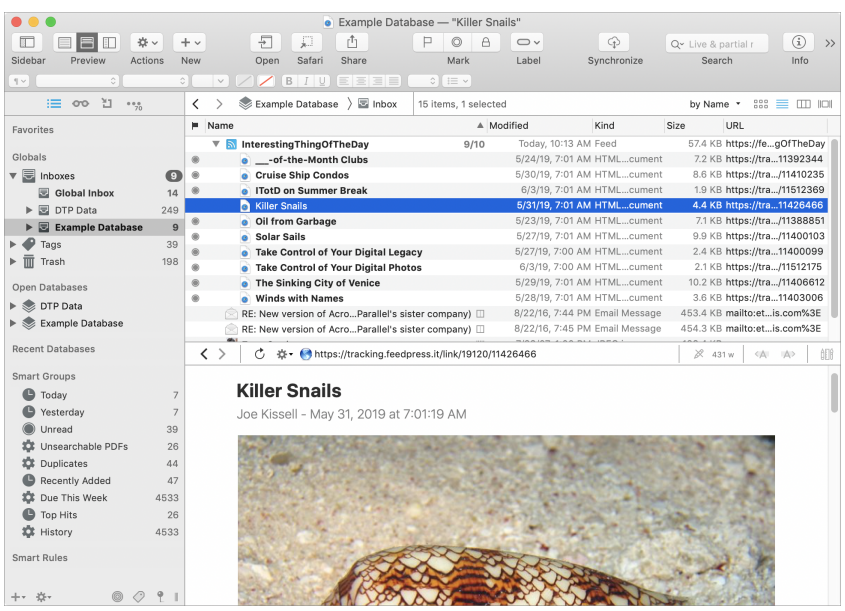


Figure 52: Feeds appear much like groups, and each article in a feed is a separate document.

A feed behaves much like a group, in that it contains other documents. A feed's tags are inherited by all its constituent articles, but unlike ordinary groups, feeds don't pass on their *own* names to enclosed documents as group tags. In other words, if you have the CNN.com feed in a Feeds group, every news article in the feed gets the Feeds tag, but not a CNN.com tag. You can, of course, manually change the tags of any individual article, or even drag an article to an entirely different location—once it's in DEVONthink, you can treat an RSS article just like any other document.

DEVONthink offers several ways to adjust feed behavior, all found in DEVONthink 3 > Preferences > RSS (**Figure 54**).

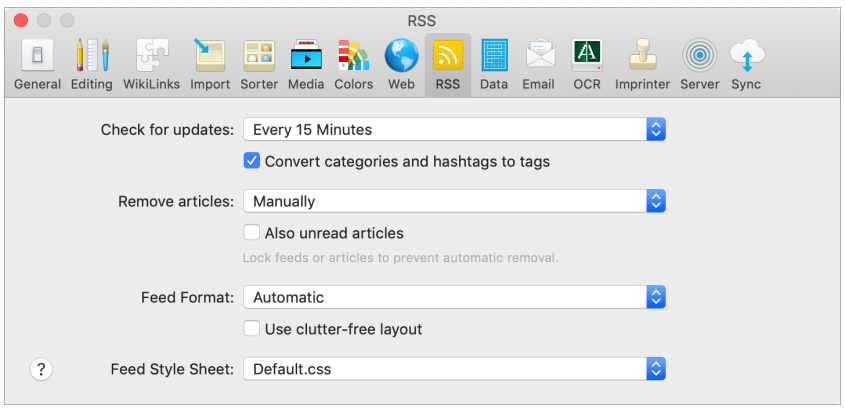


Figure 54: Set preferences here for handling RSS feeds.

You can adjust the following preferences:

- **Check for Updates:** Choose how often DEVONthink should check each feed for new articles. The default is Every 15 Minutes, but you can choose an interval as short as Every 5 Minutes or as long as "Every day"; you can also choose "After opening the database" or Manually.

> **Note:** To refresh a feed manually—even if you've chosen automatic periodic updates in DEVONthink 3 > Preferences > RSS—select the feed (not an individual article in the feed) and choose Refresh Feed from the Actions ⚙ pop-up menu on the toolbar, or right-click (or Control-click) the feed name and choose Refresh Feed from the contextual menu.

- **Convert Categories to Tags:** Many RSS feeds label each article with categories defined by the creator. To assign these categories to articles as tags, leave this box checked. However, keep in mind that these tags persist even after the articles are deleted; if you have a large number of feeds, this setting can lead to an overwhelming number of tags.

- **Remove Articles:** RSS feeds contain only a limited number of articles (typically 10–20 or so); as new ones are added, old ones disappear. You can have older articles disappear from DEVONthink too by choosing a time period from this pop-up menu, such as "After one week" or "After two months." Or, choose Manually, and the articles remain there until you delete them. (If you check "Also unread articles," this setting

applies to unread articles too; if it's unchecked, only read articles are removed automatically.)

> **Note:** Even if you have the RSS preferences set to delete older articles automatically, you can exclude an entire feed, or a particular article, from automatic deletion. To do so, select it, choose Data > Mark > As Locked, pr press ⌘-Control-K. (You can also use the comparable command on the Actions ⚙ ⌄ pop-up menu or the right-click/Control-click contextual menu.)

- **Feed Format:** Use this pop-up menu to choose the format in which DEVONthink saves RSS articles. The default choice, Automatic, saves articles as HTML documents, but if you prefer, you can also choose Rich Text, Formatted Note, Markdown, Web Archive, PDF (One Page), or PDF (Paginated). If you check "Use clutter-free layout," DEVONthink attempts to remove ads and other likely unwanted non-article content from the articles.

- **Feed Style Sheet:** DEVONthink uses Cascading Style Sheets (CSS) to determine the appearance of feed articles. Normally, you probably want Simple.css or Leopard.css, both of which offer clean styled text on white backgrounds (but with different fonts and spacing).

  Default.css is a plain-text style sheet with a small font; there's also Tiger.css, which is similar to Leopard.css but has a lower-contrast gray background (and yes, those names are quite anachronistic!). After changing the style sheet, switch to a different article to refresh the display with the new styles.

> **Tip:** If you're handy with CSS, you can create your own style sheet and put it in `~/Library/Application Support/DEVONthink 3/StyleSheets`; it then appears in this pop-up menu.

Joe's Recommendations for Getting Stuff into DEVONthink

Whew! That's a lot of ways to get data into DEVONthink, and, in fact, there are a few more that I didn't mention. You can't fault the app for a lack of flexibility—no matter where you are or what sort of data you're looking at, there's at least one way, and probably several, to add it to DEVONthink.

If you're feeling overwhelmed with all these choices, you're not alone. Sometimes I mentally go around in circles trying to pick the best way to get, say, text from a webpage into DEVONthink. Clip to DEVONthink extension? (Using which format?) Bookmarklet? (Which one?) Services menu command? (Which one?) Share extension? Print to PDF? Drag and drop to the Sorter…or the Dock icon…or an open DEVONthink window? Or what about a keyboard shortcut? I could use the one for the Take Rich Note command on the Services menu or the one for the Sorter's Copy Selection command, or I could copy, switch to

DEVONthink, and press ⌘-N to paste the contents of the clipboard as a new note! It's enough to make you crazy, thinking about all the ways you can proceed.

Everyone's different, and I don't pretend to have a one-size-fits-all solution. But after thinking about my own experiences and listening to what many other DEVONthink users had to say, I've come up with some guidelines that you may find helpful:

- **Small screen:** Are you feeling cramped on an 11-inch MacBook Air? Is your display (of whatever size) filled with windows ten layers deep? If so, you'll want to avoid more screen clutter. If you use the Sorter, display it as a menu extra using the icon rather than text. Consider hiding your Dock and using Spaces to put DEVONthink in a space by itself. Then, to get data into DEVONthink from another program, use the Sorter menu bar icon (which, as you'll recall, pops out the Sorter as needed when you drag something to the icon), the Services menu, the Share extension, or, in a web browser, the Clip to DEVONthink extension or a bookmarklet. In the Finder, use the system-wide global Inbox.

- **Large screen:** If you're fortunate enough to have, say, a 27-inch iMac and a secondary display or two, make the most of your screen real estate by keeping the Sorter open in docked tab mode (with databases and groups expanded to show as much as possible) in a convenient location, and use drag and drop to put clippings and documents right where you want them. Or, if you have *serious* screen space (like a Mac Pro with six displays), you could devote a whole display just to DEVONthink and then drag anything you want to save directly into the app.

- **Low RAM or slow CPU:** If you have an older or slower system, or one without much RAM, you may prefer to have as few apps running at a time as possible. In that case, the system-wide global Inbox is your friend, because it lets you capture data without DEVONthink having to run in the background.

- **Keyboard focus:** People who prefer to keep their hands on the keyboard will want to get used to the keyboard shortcuts for two of DEVONthink's Services: Take Plain Note [⌘-(] and Take Rich Note [⌘-)], which work on selections in many different applications. And, if you'll have the Sorter open anyway, also visit DEVONthink 3 > Preferences > Sorter and assign a convenient keyboard shortcut to Copy Selection Hotkey.

- **Neat freak**: If you believe in the motto "a place for everything, and everything in its place," then it may bother you to dump everything into an inbox (especially if it's the global Inbox) and sort things later. So, if you already have an arrangement of groups and tags you're happy with and you want to make sure everything is classified immediately, keep the Sorter running so you can drag data to a specific location, and set DEVONthink's Destination preferences (in DEVONthink 3 > Preferences > Import) to "Select group," so you're prompted to choose a group each time you import.

- **Compulsive collector:** Perhaps you're capturing information constantly, importing new data every few minutes, and it's too time-consuming and intrusive to figure out where everything goes in real time. In that case, set your default Destination to "Global inbox," and get in the habit of reviewing its contents from time to time (perhaps using the Classify command to help you sort).

- **Joe:** If you're Joe Kissell…I know, you're *not* me, but if you're curious to know what I do, here it is. I have my default Destination set to "Global inbox," because I prefer to organize my documents after the fact rather than take the time to do that when I capture them (although the option I'd prefer is one that doesn't exist—Inbox of *My Chosen Database*). When I'm working on my iMac Pro, I have the Sorter shown as a docked tab, since I have plenty of space, but on my MacBook Pro I show it as a menu extra (in icon mode) because I need every last pixel.

  In Safari, I typically use the (unpaginated) PDF bookmarklet (because it requires fewer clicks than the Clip to DEVONthink extension), and for random files or text selections, I drag them to the system-wide global Inbox or, if it happens to be more convenient, to DEVONthink's Dock icon (on the right side of my screen). I also occasionally use the Save PDF to DEVONthink 3 command on the PDF menu in the Print dialog. But most of the contents of my database comes come by way of scanning, thanks to my trusty Fujitsu ScanSnap scanner and automatic OCR.

  I regularly sort through my inbox, using the Classify command where possible, to put everything in a logical location.

Organize Your Information

Once you've gotten into the habit of collecting data in DEVONthink, you may quickly discover that you have hundreds or even thousands of pieces of information. Although you could, if you wanted, simply keep everything in your inbox and then search for whatever you need, DEVONthink offers numerous ways of grouping, labeling, tagging, and otherwise organizing your information. Once you've shown DEVONthink how you prefer to have your information organized, you can also take advantage of its almost magical Classify features.

The better you organize your data in DEVONthink, the easier it is to find what you're looking for and to see the connections between related items.

Understand Groups and Tags

Before I tell you how to group and tag documents, I want you to know a bit about how the two mechanisms operate.

Groups and tags are two ways of categorizing documents. Conceptually, they follow different models: you put documents *in* groups (so a document normally exists in only one location), whereas you apply tags *to* documents (so a document can have any number of tags). Of course, DEVONthink's use of replicants makes it possible for a single document to exist in more than one location, but tags let you apply multiple categories to a document more simply and directly.

Groups tend to work best for data that has a largely self-evident logical structure, whereas tags are generally more freeform and subjective—how you want to think of particular documents rather than what data they objectively contain.

In order to enable groups and tags to work together as effectively as possible, DEVONthink uses the same underlying construct for both. That is to say, behind the scenes, both groups and tags are merely labels—pieces of metadata associated with documents. In many respects, groups and tags function (and even look) almost exactly the same, and you can mix and match groups and tags freely (but see the sidebar Stepping Stone: Are You a Grouper or a Tagger?, ahead).

However, there are some subtle differences in behavior between groups and tags, and they interact in sometimes surprising ways.

Stepping Stone: It All Makes Sense Once You Get the Hang of It

I'm going to lay out some basic facts here—principles that govern the way tags and groups behave—but before doing so, I want to reassure you that you need not memorize, or even understand, all of this in order to use groups and tags effectively! Take a couple of deep breaths, and try grouping or tagging a few of your example documents as you read through this to see these principles in action. And if you still feel a bit lost, skip ahead a few pages to the next "Stepping Stone" sidebar for more guidance.

To reduce the likelihood of confusion, you should be aware of the following facts:

- Every tag is also a group—of sorts. All your tags are listed under Tags in the Globals portion of the Navigate sidebar, and if you drag a document from outside DEVONthink to one of these tags (meaning it's not already in an inbox or some other group), the only place that document appears in your database (other than in its inbox) is in that tag's "group."

- Groups and tags can both be hierarchical—you can nest one inside another, as many levels deep as needed, just like folders in the Finder. You can drag and drop groups anywhere they appear in your database to rearrange them, but it may not be obvious how to rearrange tags. The easiest way to do so is to go to the Tags list under Globals in the Navigate sidebar and drag one tag onto another, thus making the first tag a "child" of the second one (and causing all child documents to inherit the parent tags).

- When you create a new database, groups do not function as tags by default, but you can enable them to if you like; having done so, you can then individually prevent particular groups from being used as tags, just as you could before. DEVONthink refers to a group that also functions as a tag as a *group tag*.

  To enable group names to be used as tags, first select a database in the sidebar and choose File > Database Properties. Then make sure Exclude Groups from Tagging is unchecked. This makes *all* groups eligible to be used as tags, as indicated by group tag icons that look like stacks of tags. To then prevent a particular group from being used as a tag, select that group and choose Tools > Get Info. In the Exclude From section, check Tagging. Groups that are excluded from tagging have group icons that look like stacks of rectangles.

- In the various locations in which DEVONthink shows tags (such as in the tag bar at the bottom of the window and Tag view), group tag names appear in stacked News tokens, whereas tags you create manually—that is, ordinary tags—appear in plain News tokens.

- When group tags are enabled, documents have tags not only for the group tag that contains them, but also for any group tags higher in the structure. So, if a document is in the Cakes group tag, which is inside the Desserts group tag, which is inside the Recipes group tag, it gets Recipes, Desserts, and Cakes tags.

- Both ordinary tags and group tags apply dynamically—if you change the hierarchy of groups or of the tags in your Tags list, all documents in those groups, or marked with those tags, update themselves to reflect the current arrangement.

- You can have more than one group or group tag with *exactly* the same name, because DEVONthink places no restrictions on how many times you can reuse a group or group tag name. However, avoid doing this if you can, as it increases the likelihood that you'll accidentally apply the wrong tag.

If you've enabled groups to be used as tags, additional curiosities arise:

- If a document is in a group, ipso facto, it's tagged with that group's name. If you remove the group's tag from the document, the document disappears from that group (and, if that was the document's only tag, DEVONthink moves it to that database's inbox).

- If you replicate a document to another group, not only the new replicant, but *all* replicants get the tag of the new group name (and its parent groups). So, if a document is in the Cookies group and you replicate it to the Sweets group, both replicants will be tagged with both group names.

If all that leaves your head spinning, don't worry. It *is* a lot to keep straight, but my advice is to spend some time playing with groups and tags (following the instructions in the next couple of topics) and see for yourself how they work. If you get stuck or find that something isn't working the way you expect, refer back to the preceding list, which may help you make sense of what you're seeing.

Stepping Stone: Are You a Grouper or a Tagger?

Grouping and tagging are fundamentally different approaches to categorization. In some situations, using both together can cause confusion if you're not careful. My feeling is that most people will find DEVONthink easier to use if they stick with either groups or tags—at least for the bulk of their categorization needs. Which one should you use? It depends on your needs and how you think:

- **Grouper:** You might be a "grouper" if you've set up an extensive, well-thought-out hierarchy of folders in the Finder or mailboxes in your email app, and if you fastidiously file everything. If so, continue that practice in DEVONthink, and ignore tags. But try to give every group a unique name—perhaps one reflecting its position in the hierarchy (such as "Taxes 2019" instead of just "2019"). If you find that a document belongs in two different places, use a replicant rather than a tag. (Groups may also be best if other people will use your database, as it's often easier to locate unfamiliar material in a good hierarchy than by guessing at what tags another person may have used—even though tags may be hierarchical, too.)

- **Tagger:** You might be a "tagger" if you prefer Gmail's labeling approach over filing each message in a single, specific mailbox; if your email inbox contains thousands of messages; or if you frequently use tags to identify files in the Finder (and pay little attention to file organization). In DEVONthink, a tag person might decide to keep everything in the inbox (despite my advice to the contrary elsewhere in this book), apply tags as necessary, and use search as the main way to find things. One downside: DEVONthink's artificial intelligence features, such as See Also and Classify, won't be of any use, as they rely on (ordinary) groups.

If you do use groups and tags together, please do yourself a favor and make sure groups are excluded from tagging (the default setting for new databases), as discussed a few pages back. Keeping the two entities conceptually separate will save you lots of agony. In addition, I suggest limiting yourself to a relatively few broad groups with fairly obvious, uncontroversial names, and then using tags for more personal or subjective categories. For example, if you store lots of recipes, you might use groups for things like "soups," "salads," and "desserts," while using tags for "make-ahead," "dinner party," and "holiday."

Create and Use Groups

Creating groups is as easy as creating folders in the Finder (and in some cases, easier). DEVONthink gives you lots of ways to get documents into groups, including moving, duplicating, replicating, and using the groovy Classify features.

Create a Group

You can make a group in the current location in your DEVONthink database in any of the following ways:

- Choose Data > New > Group (⌘-Shift-N).

- From the Actions pop-up menu on the toolbar, choose New > Group.

- Right-click (or Control-click) anywhere a group or document may appear and choose New > Group.

After creating a new group (in any of these ways), type a name for it and press Return; you can select it and click its name later to rename it. The names of empty groups are shown in

gray; when a group contains one or more items, the name is shown in black.

Grouping Documents Using the Group Items Command

If you plan to create a new group and then immediately move documents into it, you can do both tasks in one operation. To do this, select one or more documents and choose Data > Group Items (⌘-Option-G) or use the Group Items command on the Actions ⚙ pop-up menu or the right-click/Control-click contextual menu.

DEVONthink puts the new group in the same location as the existing documents. Thus, grouping documents in your inbox creates a group in your inbox; You can relocate the group by clicking and dragging it.

DEVONthink places no restrictions on how many groups you can create, how deeply you can nest them, or what you can name them (you can even have multiple identically named groups in the same location if you like, which strikes me as problematic). However, I tend to get the best results—especially when using features that rely on artificial intelligence—with a modest number of groups in a database (say, fewer than a hundred or so), nested only a few layers deep, and with more than a few documents in each one.

Tip: Besides conventional groups and group tags, DEVONthink lets you make dynamic collections of documents called smart groups, which are, in fact, saved searches. See Use Smart Groups for details.

Stepping Stone: Artificial Intelligence and Document Length

The DEVONthink features that use artificial intelligence—such as See Also & Classify (discussed shortly)—work best on documents with text contents of between roughly 50 and 1,000 words. With less text, DEVONthink doesn't have enough material to make a good evaluation. And longer documents tend to be broader, making it more difficult to match them with more specific texts.

Therefore, if you're deciding how much text to select or to create when making a new document, aim for a short-to-moderate length. And, consider excluding very long documents (such as ebooks) from the artificial intelligence features to produce better matches for everything else: select each document, choose Tools > Get Info and check the Classification and See Also boxes in the Exclude section.

Move Documents

You can freely reorganize your documents whenever you like. The fundamental way to do so is to manually move them between locations. To move one or more selected items, do any of the following:

- Drag the item(s) to another group.
- From the Actions ⚙ pop-up menu on the toolbar (or at the bottom of the sidebar, for selections in the sidebar), choose Move To > *Name of Group*.
- Right-click (or Control-click) the document, and choose Move To > *Name of Group*.
- Choose Data > Move To and select a group in the popover.

Note: The top of the Move To submenu shows recent destinations to which other items have been moved. The lower part of the menu shows groups from all open databases.

Classify Documents

If you're not sure where a document belongs—or if you have a pretty good idea but want to save yourself the effort of navigating to that location—you can use the Classify features to help you choose a home for each piece of data. These features examine the contents of a document and, by comparing them to the contents of other documents in your database, recommend one or more locations in which to store it.

Classify Documents Manually

To classify a single document manually, select it and choose Tools > Inspectors > See Also & Classify (Control-S) or click the See Also & Classify icon at the top of the inspector. For now, pay attention to the top of the inspector—the Groups portion (**Figure 55**).

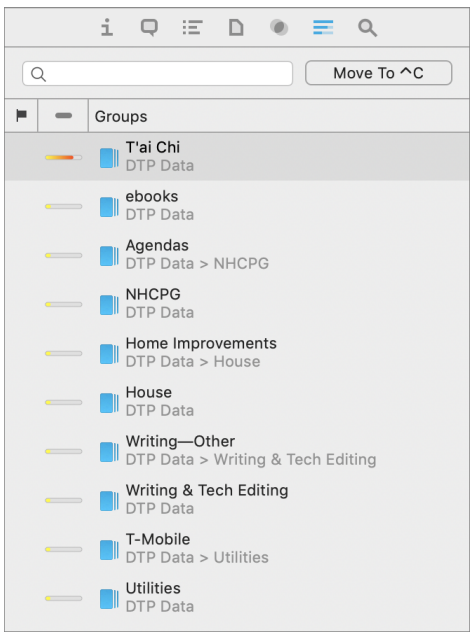


Figure 55: The Groups portion of the See Also & Classify inspector shows groups that may be a good home for the selected document.

The groups listed here are the ones DEVONthink deems to have contents most similar to the document you've selected; the column to the left of the group names contains bars that indicate the approximate level of relevance for each group. The topmost group (that is, the one with the highest score) is selected by default. To move the document into this group, click Move To or press Control-C.

If you think a different group is a better match, double-click that group name, or select it and then click Move To. And, if you think the document belongs in more than one group, ⌘-click to select more than one and click Move To; DEVONthink puts a replicant of the document in each one.

Use the Classify and Classify to Commands

If, after using the Classify feature of the See Also & Classify inspector for a while, you realize that you nearly always accept DEVONthink's default choice, you can skip a step or two and have DEVONthink move a document—or more than one document—right into the highest-scoring group. DEVONthink 2 used a command called Auto Classify to accomplish this; in DEVONthink 3, the command is Classify to "*Group Name*" (for single documents with only one recommended group), Classify to *X* groups (for documents that appear to belong in multiple groups), or simply Classify (if multiple documents are selected).

To use whichever version of the Classify command, select one or more documents and then choose Data > Classify (with or without additional words in the command); this also appears on the Actions pop-up menu on the toolbar and the right-click/Control-click contextual menu. DEVONthink then examines each one and moves it to the location it deems best. (If it can't find a suitable location, it leaves the document where it is and displays an error message in the Log panel.)

Note: The Classify command works on each document individually; it doesn't necessarily put all selected documents in the same group.

Using See Also

Even after you've decided how best to group (or tag) documents and any desired replicants, you may still want to discover which other documents in your database have similar or related content. Selecting a document and looking in the bottom (Documents) section of the See Also & Classify inspector can help you find connections you weren't previously aware of, or additional avenues to explore.

For example, if I'm collecting data on some of my favorite films, I might run across a webpage about Steve Martin and put that in an Actors group. Months later, perhaps I'm trying to expand my collection of banjo music, so I select a webpage in a different group about Béla Fleck and look in the See Also & Classify inspector. Chances are, one of the documents shown will be that page about Steve Martin, who is also an accomplished banjo player.

Like the Classify portion of the window, each item in the Documents section includes a Score bar that graphically shows how relevant DEVONthink believes each similar document is to the one you've selected. To display one of the documents, click its title.

By the way, in case you were wondering…DEVONthink 2 actually used the term "See Also" in the user interface as a label for what is now the Documents section of the See Also & Classify inspector. In version 3, that term survives only as a menu command.

Duplicate and Replicate Documents

In some cases you may want to make an exact copy of a document (a *duplicate*) or create a pointer that lets DEVONthink store just one copy, but display it in an additional location (a *replicant*).

Make a Duplicate

The most common reason to make a duplicate is that you want to modify a document but leave the original intact. (For example, you may want to use last year's annual report as the

basis for this year's report, making additions and modifications as necessary.)

To duplicate a document, first select it in the item list (not in the sidebar) and then do any of the following:

- Choose Data > Duplicate (⌘-D) to make a duplicate in the same location.
- Hold down the Option key while dragging the document to another group.
- From the Actions pop-up menu on the toolbar, choose Duplicate To > *Name of Group*.
- Right-click (or Control-click) the document, and choose Duplicate To > *Name of Group* from the contextual menu.

Make a Replicant

Replicants let you store a single document or group in several different places in your database without taking up extra disk space. (You *cannot* replicate a document across databases.) Because all replicants are pointers to the same underlying file, changes you make to any replicant are reflected in all of them. Replicants make sense for documents that don't belong in just one group, but fit well into several (and for groups that seem to belong in multiple places).

For example, if you have an ebook copy of *The Hunchback of Notre Dame* in your database, that might belong in your Paris group, your Fiction group, or your History group. With replicants, it can be in all three at the same time, and any annotations you make in any location are visible in the others too.

To replicate a document or group, first select it in the item list (not in the sidebar) and then do any of the following:

- Hold down the ⌘ and Option keys while dragging the item to another group.
- From the Actions pop-up menu on the toolbar, choose Replicate To > *Name of Group*.
- Right-click (or Control-click) the item, and choose Replicate To > *Name of Group* from the contextual menu.

Where's My Replicant?

You can tell a document or group is a replicant by the presence of the ⿲ or ⿳ icon next to its name—or its color, if you have that preference turned on—but how do you find the other replicants?

To find out, select the document and choose Go > Next Instance (⌘-Option-→) to jump to the next one, or Go > Previous Instance (⌘-Option-←) to jump to the previous one. Or, choose Tools > Get Info (or look at the Info inspector); the locations of all the replicants appear in the Instances pop-up menu on the Information panel.

Note: If your replicant appears with its name in red but no icon, that's because in DEVONthink 3 > Preferences > General the checkbox "Mark duplicates and replicants in color" is selected.

For all practical purposes, having a replicant of a document in three groups is equivalent to having a single document with three tags applied. You may need to experiment with both approaches to see whether one or the other (or a combination) works best for you.

Stepping Stone: Get Stuff Out of Your Inbox(es)

Do you have thousands of messages in your email inbox that you long ago gave up on sorting? The same phenomenon can easily happen to your DEVONthink inbox(es) if you collect text snippets, webpages, scanned PDFs, and other documents at a furious pace but can't take the time to file each one as you go. Before you know it, you're overwhelmed!

The inbox is fine as a temporary holding area, but DEVONthink works much better when items are grouped (or tagged, or both) and moved out of the inbox. So my suggestion is to do the following once a week or so (more often if you have lots of data):

- Begin by dragging documents from your global Inbox to a specific database (thus moving them to that database's inbox). In most cases, you should be able to tell at a glance which documents belong in which database. (If a document belongs in more than one database, you can Option-drag it from your global Inbox to make a copy in one database, then drag it normally to the next one.)
- For each database-specific inbox, work your way through the list of documents, dragging them one at a time to the group or tag that fits best or using the Classify features (see Classify Documents) for extra help.
- If you have way too many documents and way too little time, try the lazy approach, which is extremely fast (but not necessarily as accurate). Assuming you already have a reasonably good group hierarchy, try the Data > Classify command on a handful of documents. Once you're satisfied that most documents are going to logical groups, select everything in your inbox and choose Data > Classify to move as many of the documents as possible into appropriate groups. (Remember: if Classify can't find a good home for a document, it leaves the document alone.) Repeat this process for each database.

Tag Documents

Tags function almost, but not quite, like groups (and in some cases groups and tags are interchangeable). Tags let you apply categories to documents without moving them to another location, and a given document can have as many tags as you need.

Any tags you've applied in the Finder stay with the document or folder when you import it in to DEVONthink; likewise, any tags you apply in DEVONthink turn into Finder tags when you export a document or group (or drag it from DEVONthink to the Finder). Furthermore, any tags you apply to indexed items appear as Finder tags on those items. DEVONthink also recognizes tags applied to email messages using MailTags (part of the MailSuite plugin for Apple Mail).

The remainder of this topic discusses tagging within DEVONthink.

Use the Tag Bar

Although it's possible to create tags by themselves (select a tag in the Tags list and choose Data > New > Tag), that's a rather odd thing to do; normally you'll create a tag by applying it to a document. There are numerous ways to do this, of which the easiest is usually as follows:

1. Select a document.
2. Make sure the tag bar appears at the bottom of the window or view/edit pane. If not, choose View > Show Tags (⌘-Control-Option-T).
3. To make a new tag and apply it to the current document, click in the tag bar and start typing.

> **Tip:** For faster access, you can choose Edit > Tags (or press Control-Return) to display the tag bar if it isn't already visible and place the insertion point in it so you can begin typing immediately. This even works if the view/edit pane is hidden (meaning the tag bar can't be displayed); if the inspector is visible, DEVONthink shows the Info inspector and places the insertion point in the Tags field, and if the inspector is also hidden, an Info popover appears instead.

4. When you're finished typing the name you want the tag to have, press Tab.

The new tag appears in a blue rectangle, known as a *token*. You can repeat this process for as many tags as you want the document to have.

Use Autocompletion

Once you've created some tags, DEVONthink uses autocompletion to help you apply them. That is, as you're typing a tag name, DEVONthink looks for matches in existing tag names (within the current database only). If it finds any, it displays them in a pop-up menu. To accept one of these suggestions, select it (using the arrow keys or the mouse) and press Return; if none of them is what you want, simply keep typing normally.

Use Pop-up Tag Menus

You may notice that if you hover over any tag in the tag bar, it displays a small arrow on the right side, indicating that it's also a pop-up menu. Click the arrow to reveal the following commands:

- **Reveal Tag:** Choose Reveal Tags to show the Tags list (described ahead) and highlight the selected tag in the main view.
- **Remove Tag:** This command removes the tag from (only) the selected document.

> **Tip:** You can also remove a tag by selecting it and pressing Delete.

- **Related Tags:** Any additional tags that DEVONthink's artificial intelligence judges as potentially applicable to this document appear under Related Tags. (Tags that are dimmed are related, but already applied to the document.) To add one of these tags, select its name.

Work with Group Tags

If you enable groups to be used as tags (see Understand Groups and Tags), the tag bar shows not only ordinary tags News but also group tags News representing the name of the tag group containing the document (if any—this doesn't apply to documents in an inbox or at the top level of your database), as well as each of its parent tag groups.

These tags behave much like ordinary tags. Use the pop-up menu to reveal the group in the current view, to remove the current group tag, or to apply related tags. (If you remove a group tag, DEVONthink moves the document out of the selected group; if you remove all the group tags, the document moves to the database's inbox.)

Use the Tags List

The Globals portion of the Navigate sidebar has a hierarchical Tags list, which contains a list of all your (non-group) tags, organized by database. Click any of these tags to display all the documents with that tag.

> **Note:** If you prefer, you can go to DEVONthink 3 > Preferences > General and uncheck "Unify tags" in the Sidebar section; this causes the tags to disappear from the Globals list and appear in the item list for the database.

You can do the following in the Tags list:

- **Rename a tag:** Select it, then click its name again to make it editable, and type a new name. The new name applies to all documents with that tag.
- **Assign a tag to a document:** If you drag a document to a tag in the Tags list, DEVONthink assigns that tag to the document.

- **Move a tag:** Tags can contain other tags, such that applying a “child” tag to a document also applies all its “parent” tags. In the Tags list, you can drag and drop tags just as you would do for groups to rearrange their hierarchical structure.

Apply Image Tags Automatically

In macOS 10.13 High Sierra or later, DEVONthink 3 can automatically tag images by analyzing them using Apple’s machine learning (the same technology used in Photos) to make educated guesses about their content. To try this, select an image and choose Data > Tags > Add Tags to Images. (This command is also available in smart rules.) Although you might have better luck, my results with this feature have been so-so. For example, I tried it on a photo I took in Redwoods National Forest in northern California and got the tag “rainforest.” A photo of a nearby roadside attraction, called the One Log House, got a tag of “motel.”

Tip: You convert certain kinds of metadata to tags using the commands on the Data > Tags submenu. This can be used for hashtags (like `#apple`) found in the document body, PDF keywords and properties (which you can see on the Properties tab of the Document inspector), and geolocation.

Using Labels and Flags

In addition to groups and tags, DEVONthink offers two other ways to identify documents with shared characteristics: *labels*, each of which has a user-definable color and name; and a *flag*, which is similar to a label and calls attention to especially important documents. You have seven labels to choose from. Any document can have at most one label; applying a different label removes the previous one.

Labels and flags are useful for marking items as needing further attention, and unlike tags or groups, they give you an instant visual representation of a document’s category. However, they’re much less flexible than tags, so I recommend using tags instead when feasible.

To apply a label, select one or more items in DEVONthink and choose Data > Label > *Label Name* (or use the corresponding controls on the Actions pop-up menu on the toolbar or at the bottom of the sidebar, the right-click/Control-click contextual menu, or the Info inspector). To remove a label without applying a new one, choose None from this menu. To change the name or color of any label, go to DEVONthink 3 > Preferences > Colors > Labels. Be aware that changing the name or color of a label affects all the documents and groups that already have that label.

To apply a flag, select one or more items and choose Data > Mark > As Flagged (⌘-Option-K). Again, there are corresponding commands in the usual places—and a flag icon in the Info inspector you can click to toggle the flag on or off. To remove the flag, choose Data > Mark > As Unflagged (⌘-Option-K again). Flagged items have a small flag icon next to them in the item list; if the icon isn’t visible, choose View > Columns > Flag.

You can search for documents with a flag or a particular label (see Do an Advanced Search) or use labels or flags as part of a smart group (see Use Smart Groups).

Work with Metadata

Numerous document attributes I’ve already discussed (such as tags, labels, flags, read/unread status, and “Exclude from” settings) can be considered *metadata*—that is,

information *about* the document as opposed to the *contents* of the document. (For that matter, even the document's name is a type of metadata.) The same goes for the document's Added, Created, and Modified time stamps.

DEVONthink 3 adds even more kinds of metadata than earlier versions offered, and the Pro and Server editions go a step further by letting you create your own custom metadata types. The easiest way to see most metadata settings in one place is to select a document and display the Info inspector (**Figure 56**), with the Generic tab selected. Let's take a quick spin through the three major new categories of metadata.

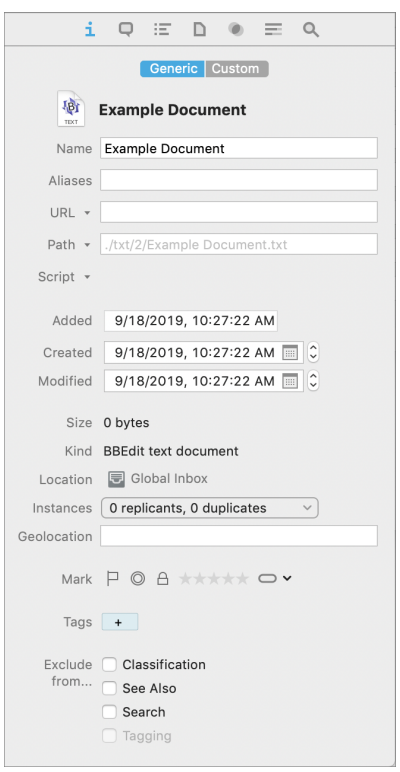


Figure 56: Add or edit metadata in the Info inspector.

Geolocation Data

Any document can have an associated geographical location. In fact, most modern smartphones, tablets, and cameras add this metadata automatically using GPS or Wi-Fi location data. If a photo or other document already has geolocation data, it appears in the Geolocation field in a human-readable form (such as "Los Angeles, CA, USA")—even if, behind the scenes, your camera stored precise latitude and longitude.

You can manually edit the geolocation data for any document, or add your own for documents that don't already have it, by typing in the Geolocation field. You might do this, for example, to indicate where you were when you created a note, or the location that a book or article refers to.

DEVONthink 3 also has a couple of other neat geolocation tricks:

- To display a map showing pins for each document with geolocation data in the current selection in the Navigate sidebar, choose Tools > Filter > Maps. The map (**Figure 57**) appears at the bottom of the sidebar.

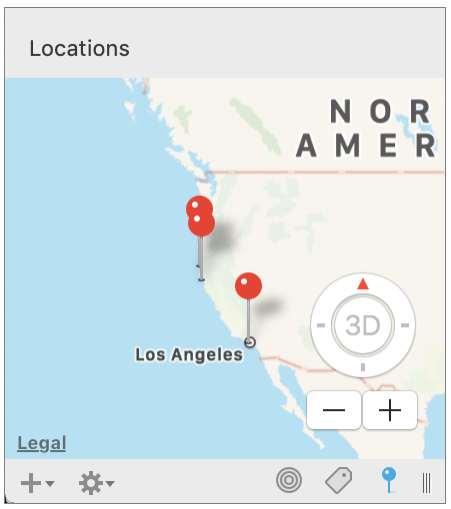


Figure 57: This map has pins for each document with stored geolocation data in the current view.

- To add tags based on geolocation data, select one or more documents and choose Data > Tags > Convert Geolocation to Tags. DEVONthink creates a tag for *each* portion of the geolocation data (as separated by commas). For example, if the geolocation data is "Los Angeles, CA, USA," you'll get three tags: "Los Angeles," "CA," and "USA." Note that this adds tags but does not remove the contents of the Geolocation field.

Star Ratings

You're familiar with star ratings from apps such as Music, TV, and the App Store. DEVONthink 3 offers them too, allowing you to categorize documents according to how much you like them. Most of us would use this for only a subset of our documents, such as a collection of photos, ebooks, or articles. Rating documents lets you sort, search, and filter them based on how many stars they have.

To assign, change, or remove a star rating, select a document and choose a number of stars (which can be zero) from the Data > Rating submenu (or from comparable locations on the Actions pop-up menu on the toolbar or the right-click/Control-click contextual menu); you can also change star ratings on the Info inspector.

Custom Metadata

Users of DEVONthink Pro or Server have even more options when it comes to metadata: you can use any of numerous additional predefined fields, or create new ones of your own, and apply this custom metadata to any document. For example, if you store ebooks in your DEVONthink database, you might want to track author names or ISBNs; or if you store recipes, you might want metadata for the number of servings or type of dish (appetizer, main course, salad, etc.).

Before you can apply custom metadata, you must tell DEVONthink which fields you want to use and how they should be configured. To do this:

1. Go to DEVONthink 3 > Preferences > Data (**Figure 58**).

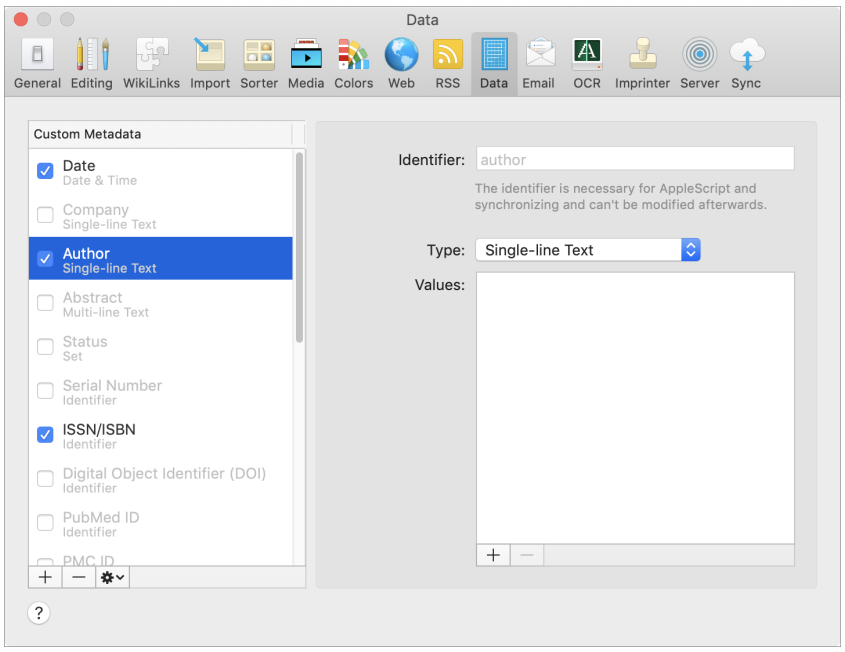


Figure 58: Configure custom metadata fields on the Data preference pane.

2. If you want to use any of the predefined custom fields, simply select the checkboxes next to their names.

3. To add a custom field of your own:

    a. Click the plus + button, type a name for your custom field, and press Return.

    b. Choose a data type from the Type pop-up menu. (The options available are identical to those for sheets; refer back to Sheet.) In some cases, you'll need to specify additional characteristics—for example, numbers and dates can have different formats, and the Set option lets you specify a list of choices for each field in that column (which appear as their own pop-up menu).

4. To add another custom field, repeat step 3. Continue for as many fields as you want to add.

Once you've done this, you can apply your custom metadata to any document by visiting the Custom tab of its Info inspector (**Figure 59**), where the extra fields appear.

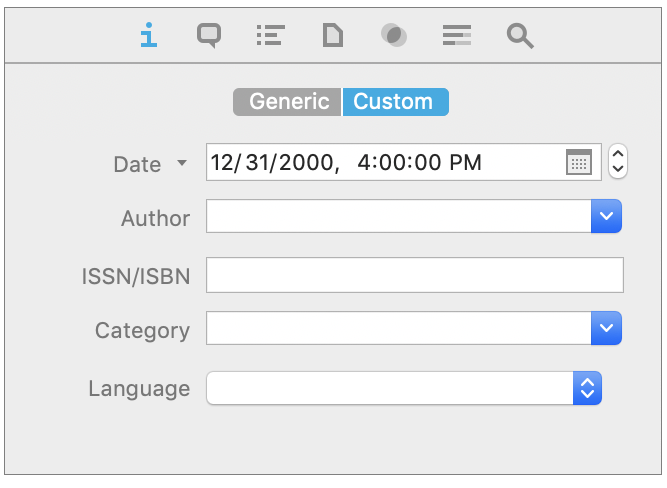


Figure 59: Apply custom metadata to documents on the Custom tab of the Info inspector.

You can also add your custom fields to table views by choosing View > Columns > *Field Name*, and you can sort on these fields by choosing View > Sort > by *Field Name*.

Scan Barcodes

If an image—or any of the first four pages of a PDF—contains a barcode, DEVONthink can *sometimes* decode it (in macOS 10.13 High Sierra or later), if it's sufficiently prominent. Select the image and choose Data > Tags > Scan Barcodes; the command is also available in smart rules. If DEVONthink is able to find and analyze the barcode, its value appears in a Barcode custom metadata field.

Make a Metadata Table

If you'd like to view all the metadata for a set of documents in one place, you can. Select the documents in question and choose Tools > Create Metadata Overview. DEVONthink creates a new sheet (stored in your default location) with each type of metadata as a column and each document as a row.

Work with Highlights

DEVONthink 3, like most word processors and PDF readers, permits you to apply highlighting (in various bright shades) to selected portions of text in a document, in much the way you might use a highlighter pen to mark up a book or magazine.

You can apply highlighting in any type of document that supports formatted text, including PDF, rich text, HTML, and formatted notes. To do so, start by selecting some text. Click the Show Editing Bar button on the navigation bar and then click the highlight icon on the editing bar or choose Format > Highlight (⌘-Shift-L). To remove highlighting from the selected text, repeat that action. You can also click and hold the highlight icon or choose Tools > Highlight Color to display a menu from which you can select a different highlight color.

If you'd like to make a list of all the highlighted passages in one or more documents, select those documents and choose Tools > Summarize Highlights > As Rich Text or Tools > Summarize Highlights > As Markdown (depending on the format you prefer). DEVONthink creates a new document with each highlighted passage (and its line number) listed, grouped by document name.

Note: Although you can apply highlighting in many kinds of documents, the Summarize Highlights feature works *only* on PDF and rich text (RTF) documents.

Work with Links and WikiLinks

Webpages contain clickable links to other webpages (often represented by blue, underlined text). Other kinds of documents—including email messages and PDF files—likewise can contain links to webpages. DEVONthink documents, too, can contain links to webpages, but they can also contain links to *other items in your database,* which is the sort of link I'm concerned with here.

Tip: Besides creating links to other documents in DEVONthink, you can also drag an event from Calendar, or an email message from Mail, into a rich text document to create a link to the event or email message.

Like webpage links, links to other DEVONthink documents appear in blue underline and let you navigate quickly to related content. Clicking a link replaces the current view with the linked document—after prompting you to save, if necessary. To return to the previous document, click the Go Back < button on the navigation bar. You can ⌘-click a link to open it in a separate tab.

A special kind of link called a *WikiLink* lets you link directly to a particular document by name, creating the document if it doesn't already exist.

Note: Most document types can contain links to other DEVONthink documents (including WikiLinks), and the links can point to any document, group, or tag.

Create a Standard Link

You can create a link to another DEVONthink document in any of several ways.

Note: Not all methods work in all document types; experiment to find what works best in your situation.

Your options are:

- **Start from the link's source:** Select some text in a rich text document, right-click (or Control-click) it, and choose Link to > *Destination* (that is, any group, tag, or document, in any open database) from the contextual menu. The text you selected becomes a clickable link to the destination you chose.

- **Start from the link's destination:** Select a document in your database and choose Edit > Copy Item Link (⌘-Control-Option-C) to put a link to that document on the clipboard. Then place your insertion point in any rich text document and choose Edit > Paste (⌘-V) to paste a link to the first document at that location.

- **Drag and drop:** Double-click a rich text document to open it in its own window. Then ⌘-Option-drag a document from elsewhere in your database and drop it at the spot where you want the link to appear. The link appears as the linked file's name.

Tip: You can change the destination of a link (whether a standard link or WikiLink) by choosing Format > Edit Link, or remove it by choosing Format > Remove Link. (Both commands are also found on the right-click/Control-click contextual menu.)

Create a WikiLink

To create a link to another document or group by name—a WikiLink—type the other item's exact name in a rich text document, select it, and choose Format > Make Link (⌘-Shift-M). The Make Link command is also found on the right-click/Control-click contextual menu. The text becomes blue and underlined. Clicking it opens the linked document or group.

> **Tip:** WikiLinks work with rich text documents. Plain text and Markdown documents are also supported if you enable *automatic* WikiLinks, described a few paragraphs ahead.

If you select some text and choose Format > Make Link but there isn't already a document or group with that exact name, DEVONthink *creates* a new document with that name (in the same location as the document you're currently editing) the first time you click the link, using a special template.

To adjust the text and variables used in this template, go to DEVONthink > Preferences > WikiLinks (**Figure 60**). Make your desired changes in the Template field at the bottom of the window. The template can include placeholders; refer back to Using Placeholders.

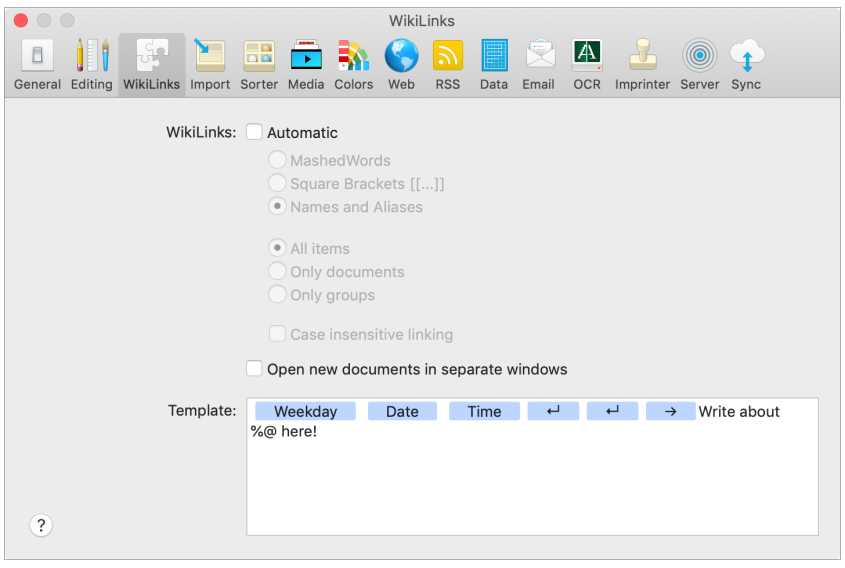


Figure 60: Adjust preferences for WikiLink behavior in the WikiLinks preference pane.

If you use WikiLinks often, you can have DEVONthink create them as you work in a much more automatic manner. In DEVONthink 3 > Preferences > WikiLinks, check the Automatic box next to WikiLinks to turn on this feature. Then select one of the following radio buttons:

- **MashedWords:** DEVONthink creates links automatically only when you type a string with no spaces and a capital letter in the middle (sometimes called CamelCase or an InterCap). For example, type `AppleScript` and that word becomes a WikiLink to a (new or existing) document named AppleScript.
- **Square Brackets [[...]]:** DEVONthink creates links automatically only when you type a string surrounded by double square brackets, like this: `[[lorem ipsum]]`. (This convention comes from Wikipedia.)

> **Note:** As of DEVONthink 3.5.2, MashedWords and double square brackets can be used at the same time.

- **Names and Aliases:** With this (default) setting, DEVONthink creates a link to *any* document in your database as soon as you type its full and exact name. DEVONthink also creates links automatically to any string of text that you've defined as an alias for a document. (To create an alias, which in DEVONthink is simply an alternative name, select a document and choose Tools > Get Info, ⌘-Shift-I, or use the Info inspector. Type one or more aliases, separated by commas, in the Aliases field.)

> **Note:** If your database contains more than one document with the same name, DEVONthink might pick the wrong one to link to. You can't force a correct *automatic* WikiLink, though you can manually Create a Standard Link instead.

DEVONthink 3 offers two new preferences for working with automatic WikiLinks:

- **Item type:** By default, you can create automatic WikiLinks to either documents or groups (including tags). To change the behavior so that automatic links are created only to documents or only to groups, select the "Only documents" or "Only groups" radio button, respectively.

- **Case sensitivity:** By default, the names of documents in automatic links must match exactly, including case. To make linking case-insensitive (so the text "apple" would link to a document named Apple, for example), select "Case insensitive linking."

You can also adjust DEVONthink's behavior when you click a WikiLink. If Open New Documents in Separate Windows is checked, DEVONthink opens a new window the first time you click a WikiLink for a document that didn't previously exist. If it's unchecked, as it is by default, the new document opens in the current view, replacing the existing document.

Move Data Between Databases

Just as you can drag items from one group to another, you can drag items from one database to another. (And note: this really does *move* items, deleting them from one database and adding them to the other, although you can also *copy* items if you prefer, as I describe ahead.)

To move one or more selected items to another database, do any of the following:

- With the Navigate sidebar visible (View > Navigate), drag the item(s) to the location of your choice in the other database. This moves them from the current database to the other database's inbox.

- Assuming you have enough room on your screen, open a new window for the second database (choose File > New Window > *Name of Other Database*) and then drag the item(s) from one window into the desired location in the other.

> **Note:** With either of the preceding procedures, you can hold down Option while dragging to copy the items instead of moving them.

- Choose Move To > *Destination in Other Database* from the Actions pop-up menu on the toolbar or at the bottom of the sidebar, or the right-click/Control-click contextual menu. (To copy rather than move, use the Duplicate To submenu instead.)

Split and Merge Documents

From time to time you may encounter a document divided into sections that cover different topics—say, an academic paper or a long ebook—and realize that the data would serve you better if it were stored in DEVONthink as multiple documents, each containing part of the data. The reverse may also be true: you may have a bunch of snippets or fragments that make more sense in a single document. If either case applies to you, you can use DEVONthink commands to quickly split or merge documents.

Split a Document

To split a document, put the insertion point at the location where you want to divide the document in two and choose Tools > Split Document. DEVONthink instantly creates two documents—one with the original name that contains the material before the insertion point, and another with the original name plus 2 and the material after the insertion point.

> **Note:** Splitting works with plain and rich text documents, Markdown documents, and PDFs.

> **Tip:** After splitting a document, a quick way to give the second portion a more useful name is to select a few words of text near the top, right-click (Control-click) the selection, and choose Set Name As from the contextual menu.

Merge Documents

To merge two or more documents, select them and choose Tools > Merge *X* Documents, or use the Merge *X* Documents command on the Actions pop-up menu on the toolbar or the right-click/Control-click contextual menu. DEVONthink creates a new document containing the contents of all the selected documents (and a name such as “5 merged documents”) but normally does not delete the originals. If you want to delete the originals, hold down Option and choose Tools > Merge & Delete *X* Documents.

You can create a merged document from almost any type of file (including graphics, plain and rich text, Markdown, PDF, sheets, and webpages). DEVONthink saves the resulting document as a PDF if the constituent documents include only PDFs, PostScript files, and/or images. If any of the merged documents is of a different type, the result is a rich text document.

Note: Depending on what kinds of documents you merge, the merged document may or may not look quite like the originals, because some documents—especially webpages—contain special formatting that doesn’t translate well into rich text form.

Find Your Information

One of the biggest reasons to store your stuff in DEVONthink (as opposed to, say, the Finder) is its fast, smart, and flexible filtering and searching. This chapter describes ways to find things in DEVONthink, from simple to complex, including a look at how to Use Smart Groups. It also discusses how to Search Using the Concordance, a specialized way of searching based on the frequency with which words appear in your database.

Use Filters

Early in this book, I talked about how to sort your information in List and Column views (see View as List, the sidebar A Word About Sort Order, and View as Columns). If you have hundreds or thousands of items in a single group or inbox, however, mere sorting might not be sufficient to pick out a particular item quickly. DEVONthink 3 adds *filters*, which provide various ways of narrowing down the items shown in a given view. (Unlike searching, which can extend across groups or even databases, filtering applies only to the list of documents currently shown in the item list, which is in turn dependent on what's selected in the Navigate sidebar or on your search results. So, you can use filters to further narrow down a search, but not as a substitute for searching.)

Three filter categories exist: info (which encompasses dates and *marks*—flag, label, read/unread state, and locked/unlocked state), tags, and location. You can display these filters at the bottom of the Navigate sidebar by choosing Tools > Filters > Info (Control-I), Tools > Filters > Tags (Control-T), or Tools > Filters > Maps (Control-G)—or click the Info , Tags , or Maps icon at the bottom of the sidebar. **Figure 61** shows each of the filter views.

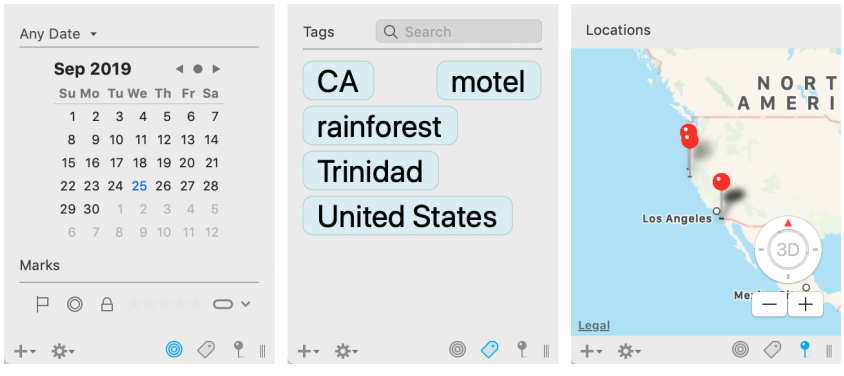


Figure 61: Filters, from left to right: info, tags, and location.

Here's how to filter your view with each category:

- **Dates:** From the pop-up menu at the top of the info filter, choose Any Date (the default), Date Added, Date Created, Date Modified, Date Opened, or Date Due. Then click a date on the calendar or drag to select a date range. DEVONthink hides any documents in the current view that are outside your specified date parameters.

- **Marks:** Click the flag, read, or unlocked icon to show only flagged, unread, or locked documents, respectively, in the current view. Or click the label icon and choose a label from the pop-up menu to display only items with that label.
- **Tags:** Click a tag to display only items in the current view that include that tag. To narrow down further, continue clicking to add more tags. To remove a single tag from the filter, delete it from the information bar; to remove all tags from the filter, click Reset on information bar.
- **Maps:** Click a pin on the map to display only the items (such as photos) with that geolocation data.

In all these cases, closing the Filters pane removes any filters from the item list, showing its full contents again.

Perform a Simple Search

Most searches in DEVONthink are simple and straightforward—and the process couldn't be easier. Type your search term into the search field on the toolbar, and DEVONthink almost instantly returns matching documents from anywhere in the current database—with default settings, you need not even press Return (**Figure 62**).

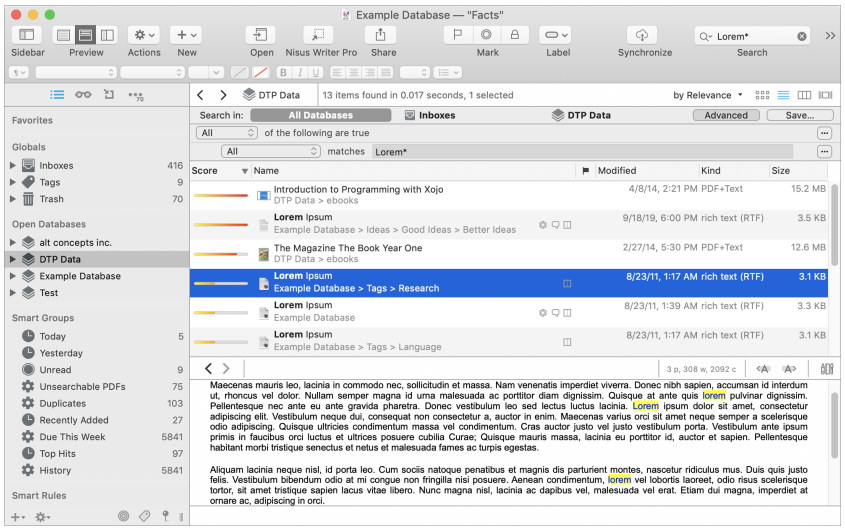


Figure 62: Type a term in the search box in the upper-right corner for a super-fast search.

By default, results are ranked by relevance, and each item has a colored bar that graphically indicates its score. Any occurrences of your search term are bolded in the results list and highlighted in the documents themselves (partial-word matches aren't highlighted, however).

Search Syntax

Searches in DEVONthink are case-insensitive (`cat` matches `Cat` and vice versa). You can also use quotation marks to enclose phrases, wildcards (such as `?` to match any single character and `*` to match any sequence of characters), Boolean operators (such as `AND`, `OR`, and `NOT`), parentheses to group items, and proximity terms (such as `NEAR`, `BEFORE`, and `AFTER`). See DEVONthink's documentation for details.

> **Tip:** If you Option-click a word in a document, DEVONthink automatically performs a search for that term.

Refine a Search with Search Options

If a simple search doesn't return the results you're looking for (or returns far too many results)—or if you want to change the manner in which results are returned—you can click the magnifying glass in the search field to display a pop-up menu with additional search options. Choose one of these to refine your search—and note that your choice remains in effect for future searches until you change it (even if you quit and reopen DEVONthink), so you may want to reset it right after use to avoid future confusion.

The first group of options, under the "Options" label, affects the way results are returned as you type:

- **Live while typing:** When this is selected, as it is by default, DEVONthink starts returning results immediately as you type. If you deselect this, you must press Return or Enter to complete your search.
- **Partial matches while typing:** Keep this option selected to have DEVONthink return items containing words beginning with whatever letters you've typed—even without pressing Return or Enter.

  When "Partial matches while typing" is unchecked, you must press Return or Enter to perform a search. And, even when it is checked, you can press Return or Enter to search for whole words—not only those beginning with whatever you typed. For example, if "Partial matches while typing" is checked and you enter `app` in the search field, documents containing strings like "approval" and "application" may appear as potential matches—as though you'd included a wildcard asterisk at the end of the search term: `app*`. But when you press Return or Enter, only those that contain "app" as a full word remain in the list.

The second (unlabeled) group of options affects how matches occur:

- **Ignore Diacritics:** With this option selected, DEVONthink ignores all diacritical marks (such as umlauts and accents) when searching, so, for instance, a search for `creme brulee` with this option enabled will match a document containing "crème brûlée", and vice versa.
- **Fuzzy:** With Fuzzy on, DEVONthink looks for alternative spellings with similar sounds (although I've rarely found this option to produce any useful effects).

Options in the third group, under the "Search in" label, affect *where* DEVONthink searches and appear only after you have begun your search:

- **All Databases:** Searches in all open databases
- **Inboxes:** Searches only in your inboxes (including the global Inbox)
- **The current database or group:** Searches in that location

At the bottom, there may be additional items:

- **Recent Searches:** If you've performed searches recently, they appear here so you can perform them again quickly. However, note that (regardless of your settings in the first group of options), recent searches appear here *only* if you press Return or Enter after typing your search term.
- **Clear Entries:** To remove recent searches from the pop-up menu, choose this command.

Use Search Prefixes

Ordinarily, DEVONthink searches look everywhere—in documents' titles, contents, and metadata. But suppose you want to search only in the title or only in the tags? For more specific searches like these, DEVONthink 3 introduces *search prefixes*, which are simply words, followed by a colon, that you type before a term in the search field that restrict the search in some way. (Spotlight has offered a similar option for many years.)

For example, if you want to search for "cat" but only if it appears in a document's name, you could enter `name:cat` in the search field. If you want to search for "cat" only when used as a tag, you can enter `tags:cat`. There are dozens of these search prefixes, which cover any type of metadata as well as various search scopes. They're all detailed in the DEVONthink documentation—look for the "Search Prefixes" topic in the appendix. That topic also talks about how you can use operators besides the colon character (which means "equals," more or less) to perform other types of comparisons ("earlier than," "is not," "ends with," "contains," and so on).

Although search prefixes are quite powerful, they're not terribly user-friendly, and you can perform most of the searches they permit in a simpler way with an advanced search, as I describe next.

Do an Advanced Search

Whether or not you modify your search criteria or use search prefixes as described above, you can extend a search with much more elaborate options than the search field offers alone. To do this, press Return or Enter after your search. A new bar appears below the path bar (**Figure 63**), and though the DEVONthink documentation doesn't give it an official name, I'll call it the search scope bar, since it displays controls allowing you to change the scope of your search.

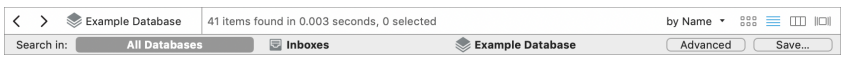


Figure 63: The search scope bar appears below the path bar when you press Return or Enter after entering a search term.

Near the right side of the search scope bar is an Advanced button. Click that to expand the view with even more options, as shown in **Figure 64**.

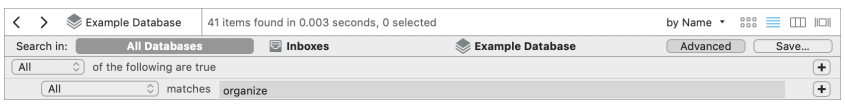


Figure 64: The search scope bar after you've clicked Advanced.

With the advanced controls showing, you're now ready to perform an advanced search:

1. Choose a search scope by clicking All Databases, the name of the current database, or Inboxes on the search scope bar.

2. Enter your first search criterion. Start by selecting a *predicate* (that is, a search context) from the pop-up menu to the left of the word "matches." You have dozens of choices, such as Content, Recipient (for email messages), Composer (for music), width (for graphics), word count, and date modified, not to mention any custom metadata you've created.

3. Once you've selected a predicate, enter any additional requested information. The exact options depend on the predicate. For example, you can choose `[Content] matches some text`, `[Height] [Is Greater Than] number of pixels`, or `[Date Added] [Is] [This Year]`.

> **Note:** As you make changes to your query using the advanced search tools, DEVONthink also updates the search field to reflect the raw syntax behind your search, so you can see how the search functions behind the scenes. Similarly, if you manually make changes to the contents of the search field, the advanced search controls change to match.

4. Optionally, to add more criteria, click the plus ⊕ button to the right of the first criterion and repeat steps 2 and 3 as necessary.

   When you have two or more criteria, you must tell DEVONthink whether to look for items that match *all* of them (choose All—the default—from the pop-up menu next to "of the following are true") or items that match *at least one* of them (choose Any).

   You can also have *compound* predicates, which let you nest Any/All criteria so you can search using expressions like "(A or B) and C" or "A or (B and C)."

   To turn an existing single predicate into a compound predicate, hold down the Option key and click the ellipsis ⋯ button to the right of any criterion (where the plus ⊕ button usually is); then choose Any or All from the new pop-up menu that appears below the existing criterion and fill in the details for the additional component just as in steps 2 and 3.

Repeat as needed to create the set of conditions you're looking for.

To cancel a search, click the X ⊗ icon in the search field.

DEVONthink returns live search results as you add and modify your search criteria, so there's nothing further to do unless you want to save your advanced search as a smart group; see Save an Advanced Search.

Note: DEVONthink 2 also offered a separate Search window. Although this window no longer appears in DEVONthink 3, all of its capabilities can be performed in other ways—for example, with an advanced search and/or by using search prefixes.

Use Smart Groups

Suppose you construct an elaborate search that returns just the documents you're looking for, and you suspect you may have to search again later with the same criteria. Or, say you always want quick access to documents having some set of attributes, even though their tags, groups, and other metadata may change. In cases like these, you might be able to use a *smart group,* a type of saved search that appears much like a regular group—but whose contents change dynamically along with the contents of your database. You can create a smart group in two ways: save an advanced search or use the Smart Group Editor (a method that provides more flexibility).

Note: DEVONthink includes a few preinstalled global smart groups, listed under Smart Groups in the sidebar: Today and Yesterday (for items added or modified on those days) and Unread (for all unread documents). Each new database also contains, by default, smart groups for All Images, All PDF Documents, and Duplicates. To add any of numerous other prebuilt smart groups, choose one from the Data > New from Template > Smart Groups submenu.

Save an Advanced Search

After performing an advanced search (as described just previously), click the Save button just above the search criteria. Type a name for the saved search and click OK. A new smart group with a special gear ⚙ icon appears in your database.

Note: If your search includes all databases, the smart group icon appears in your sidebar under Smart Groups. Otherwise, it appears at your current location (or at the top level of the database, if you're not in any particular group).

Use the Smart Group Editor

If you don't want to start with an advanced search, you can build a smart group from scratch; doing so gives you a few extra options over an advanced search. If you're familiar

with creating smart folders in the Finder, smart playlists in Music, or smart mailboxes in Mail, you'll be at home in the Smart Group Editor.

To create a smart group with this method, follow these steps:

1. Choose Data > New > Smart Group.
2. In the Smart Group Editor (**Figure 65**), enter a name for your smart group.

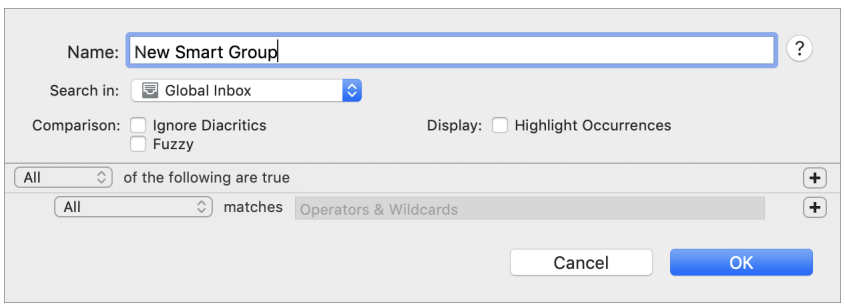


Figure 65: Use the Smart Group Editor to construct more elaborate smart groups.

3. Choose a search location from the "Search in" pop-up menu and optionally check Ignore Diacritics and/or Fuzzy—all these options work just as for other types of searches.
4. Optionally select Highlight Occurrences to highlight matching terms in the documents themselves, just as during a regular search.
5. Enter your search criteria just as in an advanced search.
6. Click OK.

DEVONthink saves your new smart group—under Smart Groups in the sidebar if your search includes multiple databases, or at your current location in the database otherwise.

To display the smart group's contents, click it, or click the disclosure triangle next to it (depending on the view).

Note: If your smart group involves date criteria, it will have a special clock icon.

Tip: Do you use DEVONthink to store searchable PDFs of scanned documents? If so, you might appreciate having a smart group that identifies all the PDFs in your database without a text layer, so that you know which ones you still need to convert. To add such a group, choose Data > New from Template > Smart Groups > PDFs (not searchable).

Modify or Delete a Smart Group

To edit an existing smart group, double-click its name. The Smart Group Editor appears; make any changes you want and then click OK.

To delete a smart group from the sidebar, right-click (or Control-click) it and choose Remove from the contextual menu. To delete a smart group from a location other than the sidebar, select it and press Delete.

Search Within a Document

The kinds of search we've covered so far are mainly intended to help you find matching documents. (And, as we've seen, they can also highlight search terms within matched documents.) But if you simply want to find something within a document—or if you want to do a find-and-replace operation—there's a new interface to do so in DEVONthink 3: the Search inspector.

To use the Search inspector, make sure a document is selected or open, and then press ⌘-F or choose Edit > Find > Find. (You can also choose Tools > Inspectors > Search (Control-U), or click the Search icon at the top of the inspector.) The Search inspector (**Figure 66**) appears.

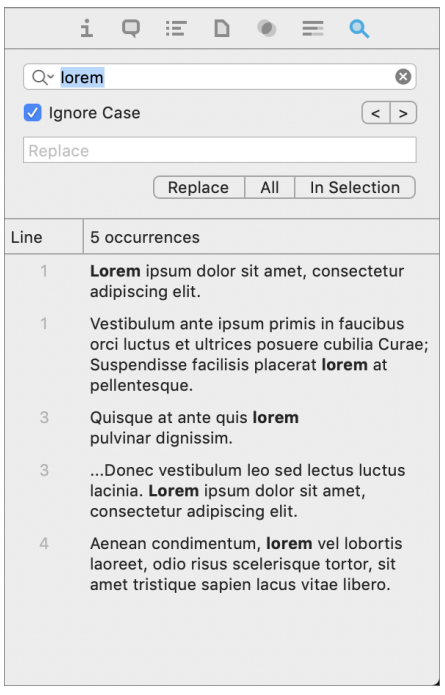


Figure 66: The Search inspector lets you do simple searches and replacements within the selected document.

To use the Search inspector, type a term into the search field and press Return or Enter—there's no live searching as in the regular search field. (There's also just one search option: Ignore Case, which is checked by default.) Matches appear in boldface in the list below; they're also highlighted in the view/edit pane. You can also select an item in the list to jump right to it, or use the forward > and back < arrow buttons to navigate.

To do a find-and-replace, enter replacement text in the Replace field and click Replace (for just the current or next occurrence), All (to replace all occurrences), or In Selection (to replace all occurrences within the currently selected text).

Search Using the Concordance

The final method of searching—available only in Pro and Server editions of DEVONthink—is to use the Concordance, which provides a list of all the words in the current selection, along with their usage frequency and other statistics.

To use the Concordance in a single document, select it and choose Tools > Inspectors > Concordance > List (Control-8) or click the Concordance icon in the inspector. The concordance inspector appears on the right side of the window (**Figure 67**) with every word listed by frequency (number of occurrences).

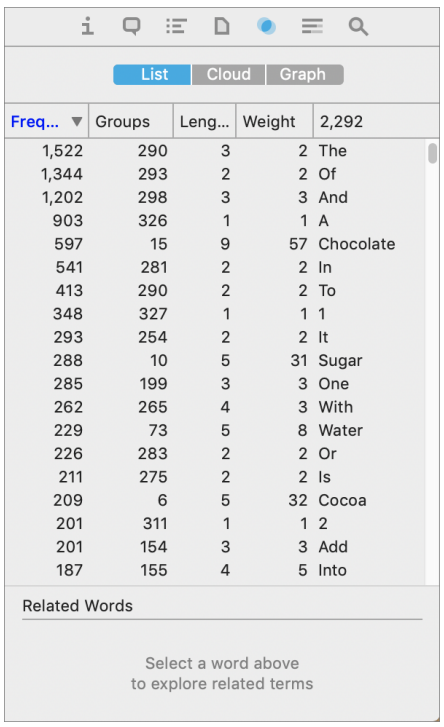


Figure 67: The Concordance inspector (shown here in List mode) shows all the words in your document, sorted by frequency.

You can click a column header to sort by that criterion, and click again to reverse the sort order. You can also drag to rearrange the columns' order. The columns are:

- **Frequency:** The number of times this word appears in the document.
- **Groups:** The number of groups in this database that contain this word.
- **Length:** The number of characters in the word.
- **Weight:** An indication of the word's relevance in a given database.
- **Words:** An alphabetical list of words. The number at the top indicates the total number of unique words in the document.

Select a word, and DEVONthink highlights each occurrence in the document. You can select multiple words by ⌘-clicking. If you select a single word, the (resizable) Related Words area at the bottom (**Figure 68**) shows a graphical depiction of other words that frequently appear in proximity to this one *throughout your database*—not necessarily in this document.

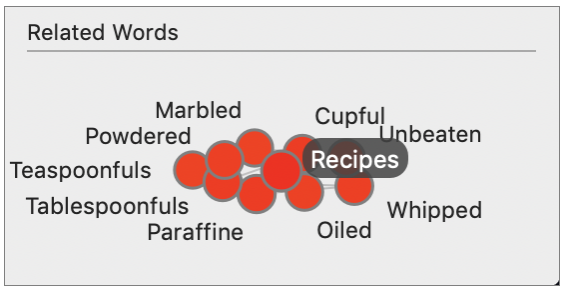


Figure 68: The Related Words view shows you other words that frequently cooccur with the selected word (in this case, "Recipes").

Although the Concordance's list view is generally the most useful, DEVONthink 3 adds two more views. Click the Cloud tab at the top of the inspector to display a word cloud, in which each term's size is relative to its weight; or click the Graph tab to show a simple (unlabeled) line graph of word frequency in the document.

Tip: To export the cloud view of the Concordance as a PDF, right-click (or Control-click) the cloud and choose Export from the contextual menu.

If your needs extend beyond a single document, such as analyzing word usage in a large corpus of texts, you can select multiple documents, a group, a tag, a smart group, or pretty much anything else to see statistics for the whole set. To show a concordance for a whole database, select the database in the Navigate sidebar and then make sure *no* items within that database are selected (meaning the view/edit pane should say "No Selection").

Work with Your Information

DEVONthink isn't only about storing, organizing, and finding information. It also contains a full set of tools for editing documents (ranging from plain and styled text to images) and for annotating PDFs—so you can do a great deal of useful work without leaving the app. And when you need to do editing that goes beyond DEVONthink's capabilities, you can easily open a document in the external app of your choice. I discuss all these options in this chapter.

Edit Documents in DEVONthink

Editing most documents is straightforward, but I must mention something up front that could confuse you if you aren't expecting it: the fact that you can *view* a document in DEVONthink doesn't necessarily mean you can *edit* it—or, in some cases, select text in it.

Because DEVONthink uses the Mac's Quick Look technology, it can index and display any kind of media the Finder can—including graphics, audio, and video files, iWork and Microsoft Office documents, and others for which Apple or a third party has installed an appropriate plugin. However, although some of these files can be manipulated inside DEVONthink, others cannot. The bulleted list just ahead gives an overview of what you can and can't do in various kinds of documents.

Just as when viewing documents, you can edit a document directly in the view/edit pane, or double-click it to open it in a separate window. Either way, before you can make changes to a document, it must be in a writable (as opposed to read-only) state. If you see a read-only icon on the navigation bar, check the Info inspector to see if the document is locked; if so, click the lock so it displays the unlocked icon. But keep in mind that some documents can't be edited, even if they're unlocked—this is true, for example, of imported email messages.

Here are the types of editing you can do in which types of documents:

- **Select text:** All document types except graphics, video, and audio (email messages must be in text-only mode—click the Text Alternative icon on the navigation bar or choose View > Document Display > Text Alternative, ⌘-Control-X, to enter this mode)
- **Edit:** Plain text, rich text, formatted note, Markdown text, HTML page, web archive, sheet, graphics
- **Highlight:** Rich text, formatted note, PDF, HTML page, and web archive
- **Imprint:** Graphics and PDF (see Add Imprints, ahead; requires Pro or Server version)

- **Annotate:** PDF only

You should also know how to access the tools you'll need when editing certain document types: the editing bar, which replaces the controls on the navigation bar when you click the Show Editing Bar icon, contains context-sensitive formatting controls that vary with the kind of document (see **Figure 69**). In most cases, there are other ways to perform the associated editing tasks (for example, using commands on the Format menu and its submenus), but it's often useful to have those controls available in this handy area right above the body of the document.

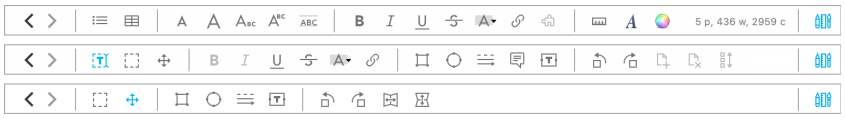


Figure 69: The editing bar as it appears for a rich text document (top), a PDF (middle), and an image (bottom).

With those preliminaries out of the way, let's look at a few of the most common document types you may want to edit.

Edit Text Documents

To edit a plain text or rich text document (or formatted note) in DEVONthink, use the view/edit pane or double-click it to open the file in a separate window (**Figure 70**), which gives you a custom—and customizable—toolbar. (Choose View > Customize Toolbar to adjust the toolbar's buttons to your liking.)

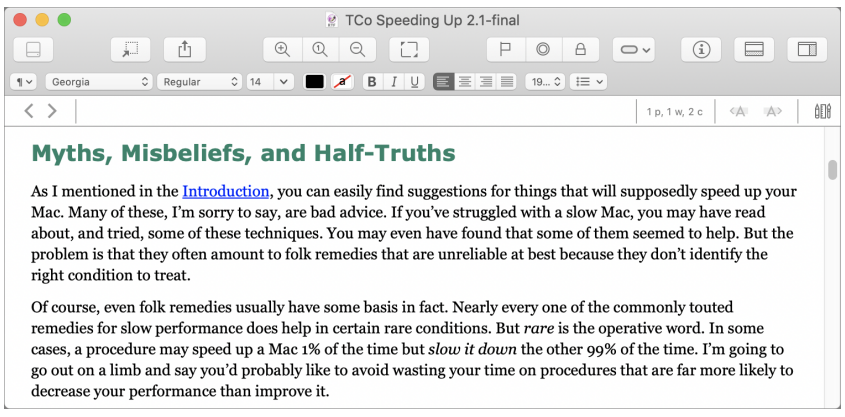


Figure 70: Editing a rich text document in its own window gives you access to a custom toolbar (not to mention the editing bar and optional format bar, shown here).

When you open a rich text document in a separate window (as in the image above), the editing bar appears automatically, though you can hide it if you prefer by clicking the Hide Editing Bar icon.

Whether or not you're using a separate window, you can also optionally display another set of tools called the format bar (see **Figure 71**), which appears right beneath the toolbar and contains font size and style pop-up menus, alignment buttons, and similar controls. To toggle the display of this bar, choose Format > Show Format Bar (or Hide Format Bar), ⌘-Shift-F.



Figure 71: The format bar.

The format bar is theoretically applicable only to documents with styled text, but that doesn't apply to formatted notes, HTML, or Markdown documents—just rich text documents. On the other hand, oddly enough, it is available with plain text documents, though only when they're displayed in separate windows. (Keep in mind that, although you can modify the display of the text in plain text documents using these controls, the style changes aren't saved with the document—it's still just plain text.)

DEVONthink's text editing capabilities are almost identical to those in TextEdit (although some commands are found in slightly different locations, or have different keyboard shortcuts), so you should feel at home. All the important formatting commands are on the Format menu or one of its submenus, just as in TextEdit. In short, for plain text and rich text documents (as well as formatted notes), there's not much to say—it just works.

Edit HTML and Markdown Documents

DEVONthink lets you edit HTML documents, Markdown documents, and web archives (which bundle HTML along with graphics and other resources in a single file) in much the same way as plain text and rich text documents. However, these three web-related formats share a unique characteristic: they are based on human-readable source code. And so, DEVONthink lets you edit these documents either in preview mode (which shows their final, rendered appearance) or in source mode (which shows their underlying tags); and you can even view both at the same time.

To switch modes, use the icons on the right side of the navigation bar or the commands on the View > Document Display submenu:

- **Preview:** The default mode, preview shows your document as it will appear with all styles, links, graphics, and so on. For preview mode, click the Preview icon or choose View > Document Display > Preview (⌘-Control-P).
- **Source:** Shows the underlying HTML or Markdown source of the document. For source mode, click the Source icon or choose View > Document Display > Source (⌘-Control-X).
- **Side-by-Side:** Shows a split view with the source on the left and the corresponding rendered page on the right (**Figure 72**). For side-by-side mode, click the Side-by-Side icon or choose View > Document Display > Side-by-Side (⌘-Control-Y).

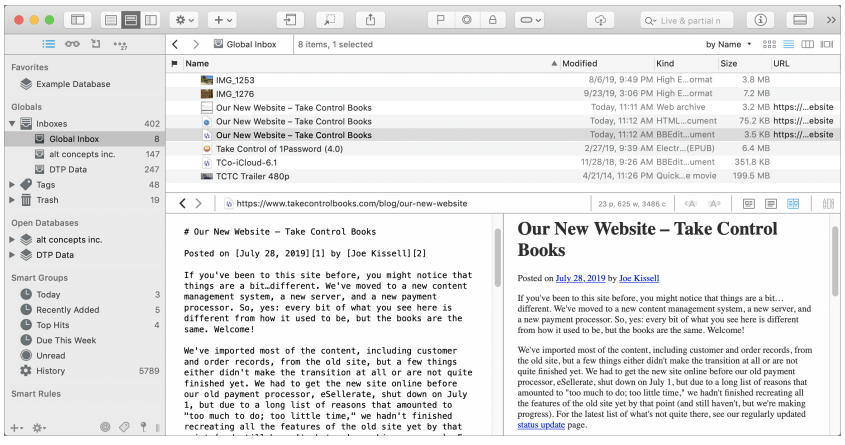


Figure 72: Side-by-side view lets you see the source of Markdown (shown here), HTML, or web archive files beside the rendered content.

When working in side-by-side mode, keep in mind that changes don't appear in the rendered pane until you save the source document (⌘-S). In addition, the two panes don't scroll in sync; you must manually scroll each pane to the same spot.

> **Tip:** As of DEVONthink 3.5, if you drop an image file from the Finder into the source of a Markdown document, the app adds a valid Markdown link to that graphic, with the image's name as a caption.

Starting with version 3.5, DEVONthink includes the Prism syntax highlighting framework for Markdown documents. That means the preview pane in DEVONthink can show code examples embedded in your Markdown code with automatic syntax highlighting. To enable it, go to DEVONthink 3 > Preferences > Media and check "Prism support" in the Markdown section. Once you've done this, open a Markdown document in DEVONthink, insert a line just before the code example, and type three backticks (`) followed by the word `language`, a hyphen, and the name of the language your code example will be in. For example:

```
```language-javascript
```

Supported languages are AppleScript, bash, C, C++, Java, JavaScript, Objective-C, Python, Perl, PHP, and Swift. An example of how this works with a JavaScript snippet appears in **Figure 73**.
```



Figure 73: Plain Markdown with a bit of embedded code (top) can appear, in preview mode, with syntax coloring (bottom).

Similarly, DEVONthink now supports the MathJAX framework, which lets Markdown previews display fully formatted mathematical equations. To enable it, go to DEVONthink 3 > Preferences > Media and check “MathJAX support” in the Markdown section. Then use a supported syntax such as LaTeX or MathML in your Markdown document (for example, `$$ \sqrt[3]{\frac xy} $$`) and switch to the preview to see the rendered result.

Edit Images

When I say you can edit images in DEVONthink, I don’t mean you can do the fancy things you can in Photoshop. What you can do, however, is rotate or flip an image; add line, shape, or text annotations; use the same image-manipulation tools built into Preview for adjusting overall attributes such as contrast, tint, and sharpness; and apply a few simple special effects.

> **Note:** DEVONthink supports graphics in most common formats, including JPEG, PNG, and TIFF. When you flip or rotate an image, or copy a portion of an image, the result is saved in uncompressed TIFF format, regardless of the format of the original.

To edit an image, select the document in your database (to edit it in the view/edit pane) or double-click the document (to open it in a separate window). Click the Show Editing Bar icon on the navigation bar to display the editing bar with graphics-specific icons; these controls are also present on the Format menu (or its submenus).

To make adjustments to the image as a whole, double-click the image, or right-click (or Control-click) the image and choose Edit from the contextual menu. The Image Edit panel (**Figure 74**) appears.

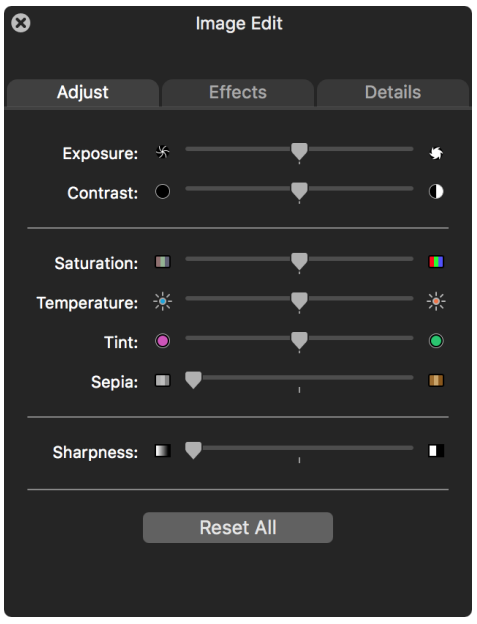


Figure 74: Use this panel to make quick modifications to photos.

> **Tip:** To change the magnification of the image (without altering the file itself), use one of the Zoom commands on the View menu or the right-click/Control-click contextual menu, or click a Zoom button on the toolbar, if you've added those buttons manually.

Move the sliders to adjust your image, and explore the Effects and Details tabs for more options. Switching between the Adjust and Effects tabs discards changes made before the switch, so close the panel to apply your changes before switching tabs.

After making any change to an image, be sure to save it (Data > Save or ⌘-S). Switching to another item in DEVONthink also saves your changes. To discard your changes, click Reset All.

Another way you can edit an image is to add an imprint; see Add Imprints, ahead.

Navigate PDFs

One of DEVONthink's strongest features is its extensive support for PDF documents. Elsewhere in this book, I discuss how DEVONthink can convert scanned documents into searchable PDFs (see Scan Documents). You can also rotate and zoom them just as you would any other graphic. However, you can do considerably more with PDFs.

For the moment, I want to focus on getting around within PDFs and performing a few basic tasks. Then, in Annotate PDFs, I explain how to add notes, comments, links, and shapes to PDF documents; and in Add Imprints, I tell you about a new, specialized type of annotation.

Choose PDF Display Options

Most of the commands dealing with the ways in which PDFs are displayed appear on the easy-to-miss View > PDF Display submenu. You have the following options:

- **Layout:** In the first group of commands, choose Single Page (the default) to display the PDF in conventional “scroll” orientation, one page above the next. Or, for a more book-like view, choose Two Pages, which shows you pairs of pages side by side. (To make the view even more book-like, also choose Book Mode, in the second group of commands, which ensures that odd-numbered pages always appear on the right and even-numbered pages on the left, as in a physical book.)

- **Page presentation:** In the second group of commands, choose Continuous Scroll (the default) to view pages in immediate succession, as in a word processor—depending on your zoom level and how far you scroll, the window may show portions of two or more pages. (Optionally choose Page Breaks to show more visible empty space between the pages.) Uncheck Continuous Scroll to view only one page in the window at a time, regardless of the window size.

- **Crop box or media box:** The third group of commands specifies which portion of the page DEVONthink displays. (For many documents, this setting has no effect, but if it seems as though DEVONthink is showing too much or too little of a PDF, try the other command.)

Move Around in a PDF

To move from one point to another in a PDF, you can use the scroll bar; you can also use the Content inspector to view the table of contents (Tools > Inspectors > Table of Contents, Control-4) or thumbnails (Tools > Inspectors > Thumbnails, Control-5), and click an item in one of those lists to jump to that spot in the document. However, you have a few other options, too:

- **Next/previous page:** To move ahead by one page (or two, if you’re in Two Pages mode via View > PDF Display > Two Pages), click the Next Page icon on the navigation bar. To move back by one page (or spread), click the Previous Page icon. The PgUp and PgDn keys also work fine.

> **Note:** If you don’t see next/previous page buttons on the navigation bar, make sure the editing bar isn’t showing—click the Hide Editing Bar icon to hide it.

- **Forward/back:** This is subtly (but importantly) different from next/previous. Because PDFs may contain links to other pages (or you may skip around by clicking thumbnails or table-of-contents entries), you may want to return to *the last page you viewed,* even if it’s not the previous page in the document. To do this, click the Go Back < icon on the navigation bar (⌘-[), which works the same way as a Back button in a web browser. To move forward after going back, click the Go Forward > icon on the navigation bar (⌘-]).

- **Go to page:** To go to a specific page in the PDF, choose Go > Go to Page, type the page number, and click OK. You can also click the page count on the navigation bar to

display a Go to Page dialog.

Tip: In PDFs (as in any document in DEVONthink), you can use the Edit > Find > Find command (⌘-F) to search for text within the current document and jump directly to it.

Tip: You can select text in a PDF in the usual way—just click and drag. But you can also select a *vertical* column of text (such as a column in a multi-column document, or a sidebar). To do so, hold down the Option key while clicking and dragging

Annotate PDFs

DEVONthink has the capability to *annotate* PDFs—that is, to add comments or notes, highlight interesting passages, or even draw shapes on the pages, all without changing any of the underlying text. Annotations can be useful when marking corrections on page proofs, discussing a report or paper with your colleagues, or jotting reminders as you read an ebook.

To annotate a PDF, you can use the commands on the Tools > Annotate submenu or display the editing bar (by clicking the Show Editing Bar icon) and use the icons that appear there. **Figure 75** shows a PDF with a variety of annotations.

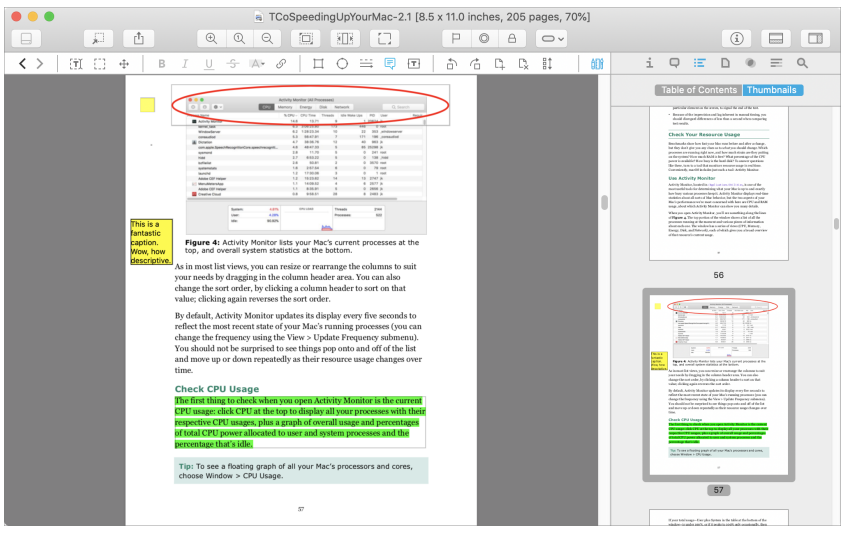


Figure 74: This PDF page has oval, text, and note annotations, as well as green highlighting.

You can annotate a PDF in any of the following ways:

- **Add a shape:** To call attention to a portion of the document, click the Oval tool, the Rectangle tool, or the Line/Arrow tool on the editing bar. Then click and drag to draw the selected shape. When you do this, an Annotations panel (**Figure 76**) appears, with controls to let you select the color, thickness, and other properties of the shape. (The range of options available in the Annotations panel varies depending on which type of annotation you're entering or editing.)

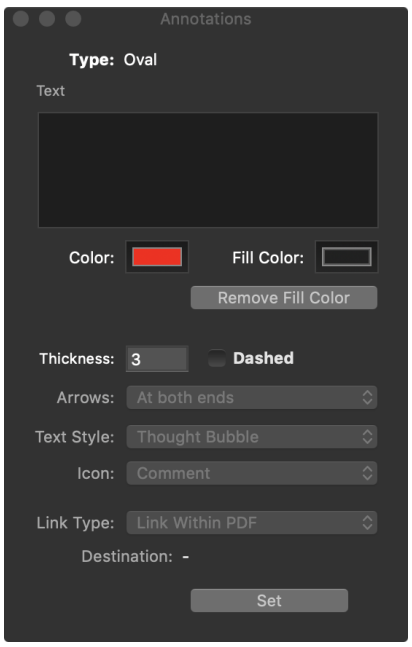


Figure 76: Adjust the characteristics of an annotation here. This is how the Annotations panel appears when you add an oval shape.

- **Add a note:** A note is a comment that appears with a small reference icon at the location of your choice on the page; double-click this icon to display the note's contents in the Annotations panel. (In Catalina only, if the document is open in its own window, clicking the icon displays the note's contents in an overlaid "sticky note.")

  To add a note, click the Note tool on the editing bar and then click where you want the reference icon to go. When the Annotations panel appears, type your note in the Text field at the top and then click the close button in the upper-left corner of the panel.

- **Add text:** Unlike notes, which normally appear as unobtrusive icons in your document, text annotations appear on top of the text (much like a sticky note). To add text, click the Text Annotation tool on the toolbar, and then drag out a box to hold your annotation. When the Annotations panel appears, type in the Text field at the top and then click the close button in the upper-left corner of the panel.

- **Add a link:** You can add a link anywhere in the document, either to another location in the document or to an external URL. To do this, click the Link tool on the editing bar and then drag out a box where you want the link to appear. When the Annotations panel opens, do one of the following:

  - To link to a URL, choose URL (the default) from the Link Type pop-up menu, and then type or paste a URL into the URL field at the bottom.

  - To link to another page in the document, choose Link Within PDF from the Link Type pop-up menu. Then move to the location in the PDF to which you want the link to point (by scrolling or clicking a thumbnail, for example) and click Set.

  Click the close button in the corner of the panel when you're done. Your link will be clickable only when the Text tool or the Select tool is selected. (By the way, the

purpose of the Select tool is to let you select annotations—to edit, move, or delete them—not to select contents of the PDF itself.)

> **Note:** Links you create yourself in DEVONthink are normally invisible; they appear with the gray crosshatch only when the Select tool or one of the annotation tools is selected. Regardless of visibility, they're clickable only when Text or Select is selected—not when Move is selected. The pointer changes to this shape when over a link.

- **Apply underline or strikethrough:** Select any text in a PDF and click the Underline or Strike Through icon on the editing bar, or choose Format > Style > Underline (⌘-U) to underline it or Format > Style > Strike Through (⌘-Control-S) to cross it out.

- **Highlight text:** To apply a highlighter effect, select a range of text and click the Highlight icon on the editing bar, or choose Format > Highlight (⌘-Shift-L). To adjust the highlight color, click and hold the icon and choose a color from the pop-up menu, or choose a color from the Format > Highlight Color submenu. To remove a highlight, select the highlighted text and choose the Highlight command again.

  You can also add a note to highlighted text: Open the Document inspector and click the Annotations tab. Highlight text and then type your note in the Details field at the bottom. Be aware, however, that this note won't be visible anywhere else—for example, you'll see only the highlight if you open the PDF in another app.

After making any annotations, be sure to save the document.

To remove an annotation, make sure an annotation tool is selected; then select the annotation and press Delete. To edit an annotation, double-click it, again with any of the annotation tools active. You can change the font and color of the selected annotation using the standard Fonts panel (⌘-T); move it using the arrow keys or by clicking and dragging.

Add Imprints

Imprints are new in DEVONthink 3, and present only in the Pro and Server versions. You can think of an imprint as an automated version of a text annotation. An imprint can add text (in your choice of font, size, color, and style; and with an optional shape border and fill) to a PDF or graphics file. But unlike text annotations, imprints can include placeholder text, numbering, and precise positioning; and you can apply them to all pages or only particular pages of a document. Imprints are thus good for watermarks, stamps, page numbering, and other material that you might want to add to images and PDFs in an automated way.

To create an imprint, start by going to DEVONthink 3 > Preferences > Imprinter. Click the plus button, then click the name ("New Imprinter") under the Configurations heading, type your own name for the imprint, and press Return. The window should then look something like **Figure 77**.

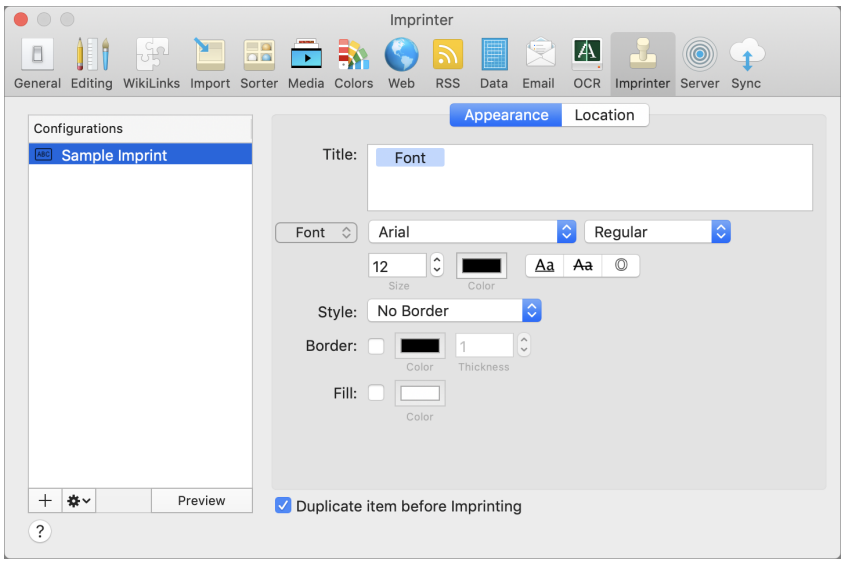


Figure 77: Set up the contents and appearance of imprints here.

In the Title field, type the text you want to appear in the imprint. (You'll notice a Font token in that field; this is a placeholder telling DEVONthink you want to specify the font information for the imprint, which you almost certainly do. You can delete that token, but DEVONthink will put it back automatically. Basically: just ignore it.)

Speaking of placeholders, you can use as many as you like in an imprint. Right-click (or Control-click in the Title field) and choose a placeholder from the Insert Placeholder submenu of the contextual menu. Among the many options (see Using Placeholders for more information) are File Name, Counter, Page Number, various date and time options, Bates Number, and custom metadata.

Use the controls below the Title field to specify the font, size, style, and color you want for your imprint. Use the Style pop-up menu to enclose your imprint in a shape; the choices are rectangle, rounded rectangle, oval, left-pointing arrow, and right-pointing arrow. If you choose one of these borders, you can then use the Border and/or Fill controls to specify whether the shape should have a border, fill, or both—and what the border/fill attributes should be.

To specify where on each page the imprint should go, click the Location tab (**Figure 78**). Click a square in the Position selector to anchor the imprint to that relative spot on the page; then use the Offset fields to specify the number of pixels by which it should be offset from that location in each axis. To rotate the imprint, enter a number of degrees in the Rotation field. Finally, select an Occurrence radio button to specify which page(s) of a document the imprint should apply to.

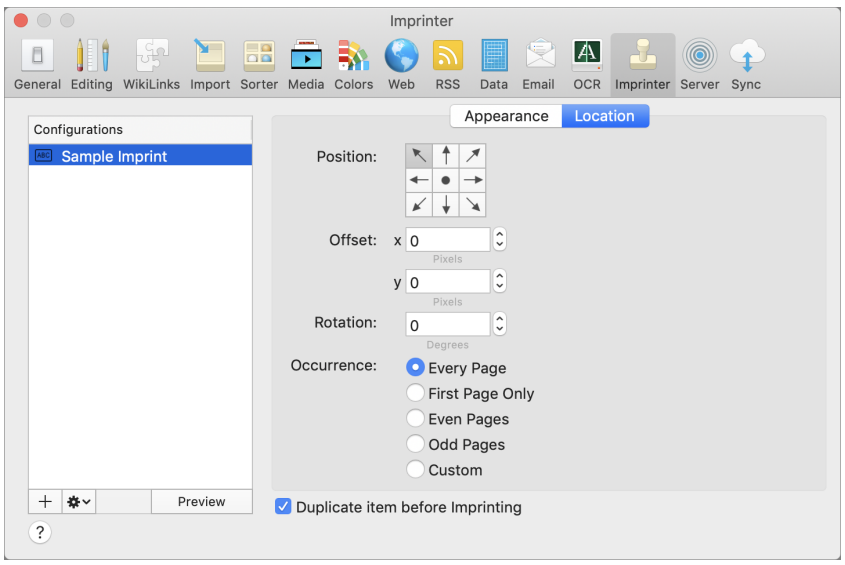


Figure 78: Set the location, rotation, and occurrence of imprints here.

Three other imprint options are worth mentioning:

- **Duplicate item before imprinting:** Because imprints permanently change the document and DEVONthink offers no tools for removing them, you might want to hedge your bets by checking this box, which instructs DEVONthink to make a copy of each item you imprint, and then add the imprint to the copy.

- **Preview:** Click the Preview button at the bottom of the Configurations list to see what your imprint will look like on an example document page.

- **Combined Configurations:** What if you want to put multiple imprints on the same document, each with different characteristics? You could manually apply multiple imprints, but an easier way is to create each imprint individually, then create a combined imprint that applies them all at once. To do this, click the actions ⚙ button at the bottom of the Configurations list and choose New Combined Configuration from the pop-up menu. Select an imprint from the Configurations list on the right and click the left < arrow button to add it to the combined configuration. Repeat as necessary to add more imprints to the combination.

Once you've configured an imprint, you can apply it to any image or PDF by selecting the document and then choosing Tools > Imprinter > *Imprint Name*. DEVONthink adds the imprint, converting placeholders into real text as appropriate.

Convert Document Formats

Earlier I mentioned that scanned PDF documents can be converted to searchable formats (PDF, RTF, Word, and web archive) by choosing commands from the Data > OCR submenu. DEVONthink can perform other conversions too—find the commands on the Data > Convert submenu.

The additional options and the document types they can convert are:

- **to Plain Text:** Any text-based format, such as rich text, HTML, Markdown, PDF, Pages, Word, web archives, formatted notes, bookmarks, email messages, and EPUB
- **to Rich Text:** Plain text and most other text-based formats (such as sheets and PDF, but not Pages), plus graphics
- **to Formatted Note:** Plain text, rich text, and most of the text-based formats (but not PDF or Pages)
- **to Markdown:** Most text-based formats, such as rich text, HTML, PDF, Pages, Word, web archives, and email messages—but not EPUB
- **to HTML:** Plain text, rich text, PDF, and most of the text-based formats (but not Pages)
- **to Web Archive:** Any text-based format, such as rich text, HTML, Markdown, PDF, Pages, Word, email messages, and EPUB
- **to PDF (Single Page):** Any document type that DEVONthink can edit
- **to PDF (Paginated):** Any document type that DEVONthink can edit
- **to PDF without Annotations:** PDF only
- **Duplicates to Replicants:** Items that have duplicates in your DEVONthink database

Edit Documents in External Apps

For documents that DEVONthink can't edit itself—or in cases where you need special features found in a different editor—you can open any document in another app of your choice.

To open a document in an external app, select the document and choose Data > Open With > *Name of Application*. (The Open With submenu also appears on the Actions pop-up menu on the toolbar and on the Control-click contextual menu.) The apps listed there are the ones that advertise themselves as being able to open the file format in question. For example, when you select a Word document, the Open With submenu shows not only Microsoft Word (as the default choice, at the top), but also TextEdit and other applications you may have that can read Word files, such as Pages and Nisus Writer Pro.

If you prefer to not use DEVONthink's document editing tools, you can also choose to have all files open in their default app when double-clicked. The behavior here depends on what is set in DEVONthink 3 > Preferences > General > "Double-click opens documents externally":

- If that box is *checked*, then double-clicking any document—even one DEVONthink can edit intrinsically—opens it in the default app for that document type. If you want to open it in DEVONthink instead, as a read-only preview, instead select the document and choose Data > Open (⌘-O).

> **Note:** You can also double-click an attachment within another document (typically a rich text document or an email message) to open it in the appropriate external app.

- If that box is *unchecked*, then double-clicking any document opens it within DEVONthink. If it's a file format DEVONthink can edit, then you get an editing window; if not, you get a preview window. To force the document to open in the default external app, select it and press ⌘-Shift-O.

Automate DEVONthink

DEVONthink offers plenty of power and utility when used manually—dragging stuff in; finding, organizing, and editing things; and sharing or exporting things. But you can also put DEVONthink to work for you by configuring it to automate repetitive or time-consuming tasks. Although DEVONthink has supported AppleScript for many years (and continues to do so), some of the biggest new features in DEVONthink 3 involve other types of automation.

In this chapter, I cover four main ways to automate DEVONthink: using smart rules, reminders, AppleScript, and smart templates.

Work with Smart Rules

As you'll recall (refer back to Use Smart Groups), a smart group is basically a saved search that lists items matching one or more criteria you specify. A *smart rule* builds on that concept—instead of merely *listing* items that meet your criteria, it *does something* when items meet your criteria. In this way, it's much like the rules (or filters) your email app offers—for example, when a message comes in with a certain sender, a rule might file it into a particular mailbox; or if a message has a specific subject, your email app might send an autoreply.

But DEVONthink's smart rules can do fancier things—for example:

- When DEVONthink opens, convert any web archives in your inbox that mention your name into PDFs
- Every time you move a document with a certain label, change its modification date
- Once a week, move any unread items in your global Inbox to the Trash
- Perform OCR on every PDF document that's imported via the Sorter
- Replicate items with a certain tag to a predefined group whenever you open them

Set Up a Smart Rule

What you'll notice about the example smart rules above is that they all feature search criteria (which can include a specific location, or not, and zero or more attributes), an action (what DEVONthink does with them), and a *trigger* (what event happens that causes the action to occur, such as opening the app or moving a document). DEVONthink offers a long list of actions to choose from, and a smart rule can also perform a sequence of actions.

Similarly, many different events can trigger a smart rule, or you can trigger the rule manually in multiple ways.

To create a smart rule, follow these steps:

1. Either choose New Smart Rule from the New pop-up menu at the bottom of the sidebar or right-click (or Control-click) an item in the sidebar and choose New Smart Rule from the contextual menu. The Smart Rule dialog (**Figure 79**) appears.

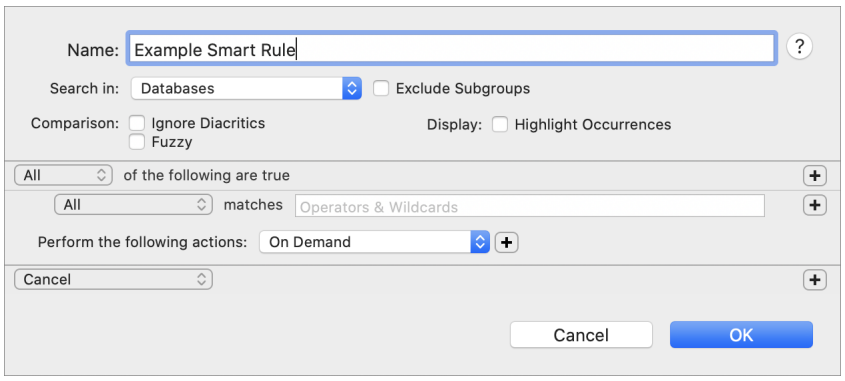


Figure 79: Create a smart rule using this dialog.

2. Type in a name for your smart rule.

3. Specify the scope of the rule: from the “Search in” pop-up menu, choose an inbox, database, group, or tag; or choose Databases to search everywhere.

> **Note:** If a location is selected in the sidebar when you create your smart rule (or if you use the contextual menu to create it), the “Search in” pop-up menu is initially set to that location.

4. Fill in the options and search criteria just as you would when creating a smart group (refer back to Use Smart Groups).

   So far, what you’ve done is identical to what you would do when creating a smart group. But now, instead of displaying a list of matches, you specify what DEVONthink should do with matches, and when.

5. From the “Perform the following actions” pop-up menu, choose a trigger—that is to say, an event that must occur in order to make your rule run. There are 35 options, including On Startup, Hourly, On Creation, On Open, On Replicating, On Tagging, and On Moving into Database. Most of these should be self-explanatory, but consult the DEVONthink documentation for details if need be.

   If you want your smart rule to run only when you ask it to—for example, by choosing a menu command or dropping a document onto your smart rule—choose On Demand (the default choice).

Starting with DEVONthink 3.5, a given smart rule can be triggered by more than one action. For example, you might have a rule that operates when a document is opened as well as when tags are added. To add another trigger, click the plus ⊕ button next to the "Perform the following actions" pop-up menu.

6. From the unlabeled pop-up menu in the bottom portion of the dialog, choose an action that will occur when the rule is triggered and the conditions are met. There are dozens of options, such as Display Alert, Add to Reading List, Change Name, Add Tags, Move, Classify, and OCR. Again, see the documentation for details about any actions that seem unclear.

   Some actions require additional information. For example, if you specify Display Alert, you must fill in the text of the alert; if you specify Move, you must fill in a destination.

> **Note:** One of the available actions is Execute Script, to run an AppleScript. Choose External to use a script already stored in the designated Smart Rules folder (or one you save there), or choose Embedded and click Edit Script to enter a script directly in DEVONthink. See Included Scripts, ahead, for more information. DEVONtechnologies strongly recommends that if you include an Execute Script action, you make it the last action in the rule.

7. To make the rule perform an additional action, click the plus ⊕ button and fill in the details; repeat as desired.
8. Click OK.

DEVONthink saves the smart rule, which thereafter appears in the Smart Rules section of the Navigate sidebar. (Smart rules are always considered global items, even when they apply only within specific databases.)

From now on, whenever the trigger(s) you chose occur(s), DEVONthink runs the smart rule—it looks in the location you specified for items that match the criteria you set, and if it finds any, it performs the action(s) you requested.

To edit a smart rule later, double-click it in the sidebar; to keep the original and edit a copy, first right-click (or Control-click) the rule and choose Duplicate from the contextual menu. (You might also try this with the smart rules DEVONthink includes by default—such as Filter Duplicates and Automatic Locking—to see how they work.)

> **Tip:** To turn an existing smart *group* into a smart rule, hold down Option while right-clicking or Control-clicking and choose "Duplicate as smart rule" from the contextual menu.

Run Smart Rules Manually

If you chose On Demand as a trigger in step 5 above, you can run your rule manually in one of the following ways:

- Drag one or more items onto the smart rule icon in the sidebar.
- To apply a smart rule *only* to selected items (assuming they match the rule's conditions), select one or more items and choose Tools > Apply Rules > *Rule Name*.
- To perform a smart rule on *any* item in your database that might match it—regardless of what you may have chose when you created it—choose Tools > Perform Rules > *Rule Name*; read and consider the warning asking if that's really what you want to do, and click OK if you still want to run the rule.

Batch Processing

A batch process is sort of like a manual, ad hoc smart rule—but just the action part, not the matching part. For example, if you want to rename a set of documents, or change something about their metadata, but just as a one-time task and not a recurring event, you can use a batch process to do so.

To perform a batch process, select one or more items and choose Tools > Batch Process (⌘-Control-B). In the dialog that appears, choose an action from the pop-up menu and fill in any required details. (The list of actions available for batch processing is a subset of the actions available for smart rules.) As with a smart rule, click the plus ⊞ button to enter more actions. Click OK to apply the actions you just specified to the selected items.

Use Text Searches in a Smart Rule

In DEVONthink 3.5, smart rules (and batch processes) acquired Scan Name and Scan Text actions. These actions enable DEVONthink to search either the name of a document or its contents for a pattern, which can then be used in a subsequent action. The patterns you search for can include wildcards and regular expressions.

As an example of how you might use one of these actions, see **Figure 80**, below. In this smart rule, imported documents whose names begin with "TPS Report" are searched for a line that matches the pattern "Report Title: *something*" (followed by a return), using the regular expression `Report Title: (.*)\n`. The next action then uses that *something* (`\1`) to rename the document.

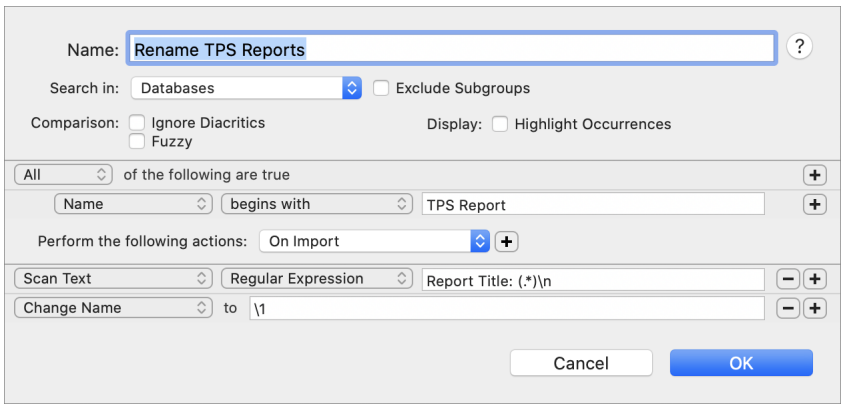


Figure 80: This smart rule looks for a text pattern within certain imported documents and uses it to rename those documents.

Note that if you're using a String search (instead of a regular expression, as in this figure), the wildcard `*` (any string) can't appear alone; it requires a prefix and/or a suffix, such as

`Date: *`. You can then reference that string in another action by typing `%Document String%` or by right-clicking or Control-clicking in another action's field and choosing `*` Document String from the Placeholder submenu of the contextual menu.

Use Reminders

Reminders are yet another feature added in DEVONthink 3. If you've ever set an alarm in Apple's Calendar or Reminders apps to alert you when an event is about to occur, DEVONthink's reminders will look quite familiar. Any item can have a one-time or recurring reminder. For example, if you've imported a webpage but you want to remember to revisit it to check for changes on a certain date, or if you want to set alarms for deadlines relating to a project you're developing in DEVONthink, reminders can help you with those tasks.

I think of reminders as an automation feature partially because they make things happen at a fixed time or on a recurring schedule without manual intervention, and partly because one form a reminder alarm can take is running an AppleScript (which, as you'll see later in this chapter, can do just about anything).

To set a reminder:

1. Select any document or group.

2. Choose Tools > Inspectors > Annotations & Reminders (Control-3) or click the Annotations & Reminders icon at the top of the inspector (**Figure 81**).

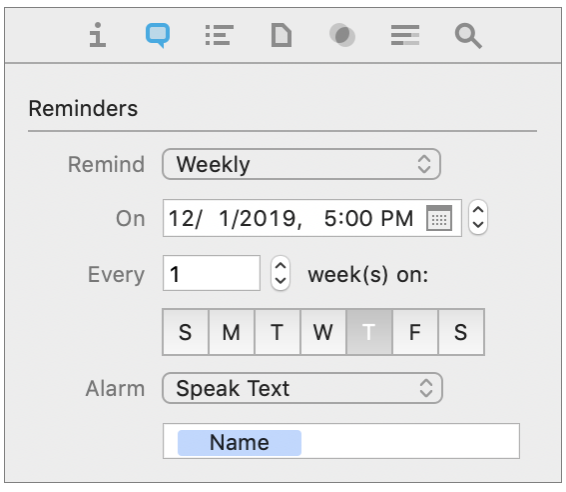


Figure 81: The Annotations & Reminders inspector as it appears with a weekly reminder set.

3. From the Remind pop-up menu at the top, choose when the reminder should occur—Never (the default), Once (including preset options of Today, Tomorrow, In Two Days, and In One Week), Hourly, Daily, Weekly, Monthly, or Yearly.

4. For anything other than Never, fill in the details of the day(s), date(s), and time(s) for the reminder, just as in the Calendar app.

5. From the Alarm pop-up menu, choose the type of alert. In most cases, something visible (Display Notification or Display Alert) or audible (Speak Text or Play Sound) is

probably what you want, but you can also send an email, open a document, or run an AppleScript. As with smart rules, the script can be either external (that is, one that's stored in the designated Reminders folder—see Included Scripts, ahead) or embedded (something you type or paste into DEVONthink). Be aware, however, that if you use an embedded script with a one-time reminder, the script will disappear from DEVONthink once the reminder occurs.

Note: Unlike alerts in Calendar and Reminders, DEVONthink's reminders can have only one alarm per item.

Note: You can disable all reminder alarms if need be by going to DEVONthink 3 > Preferences > General and unchecking "Enable reminder alarms."

Use AppleScript with DEVONthink

Despite DEVONthink's incredibly long list of features, it may not do everything you want it to do. Fortunately, it also includes extensive support for AppleScript, which means you can add new capabilities to the app, automate complex sequences of tasks, and integrate DEVONthink in novel ways with other apps running on your Mac.

Many books have been written about AppleScript, and I couldn't begin to offer a proper guide to using it here. (I can, however, put in a quick plug for my book *Take Control of Automating Your Mac*!) Instead, what I provide here is simply a quick overview of DEVONthink's AppleScript support, a few examples of included scripts, and pointers on where to learn more.

AppleScript is an English-like scripting language that was designed to be reasonably easy for non-programmers to learn. (Whether that turned out to be true or not is open to debate!) Apple provides a tool called Script Editor (in `/Applications/Utilities`) that facilitates writing, running, and debugging scripts (although other, more advanced scripting environments also exist).

An app that can be controlled by AppleScript is said to be *scriptable*, and DEVONthink is scriptable in the extreme, exposing 90 verbs (commands) and more than a dozen nouns (objects that can be acted on), each with various properties (parameters).

However, you needn't know any AppleScript to start using these capabilities. DEVONthink includes over 100 preinstalled AppleScripts, which can perform an astonishing range of useful activities as they stand—and can also be used as models when creating your own scripts. These scripts can be used without any special knowledge, in most cases simply by choosing them from a menu—so it's like having 100 extra features to play with!

> **Tip:** DEVONthink's AppleScripts are installed automatically when you first run the app, but you can reinstall them if needed by choosing DEVONthink 3 > Install Add-ons, checking Additional Scripts, and clicking Install.

I encourage you to try them out, and then if you're interested, open a few of them in AppleScript Editor to see how they work.

Included Scripts

DEVONthink's preinstalled scripts fall into several broad categories:

- **Menu scripts:** These scripts appear on DEVONthink's Script menu only when DEVONthink is running, and thus are intended to be used from within DEVONthink. This is the largest category, with over 70 scripts. The script files themselves are stored in `~/Library/Application Scripts/com.devon-technologies.think3/Menu` (and its subfolders); if you add your own script to that folder (or even to a subfolder you create yourself), they'll appear on the menu too. A few noteworthy examples:
    - *Images:* Among the scripts on this submenu are ones that can rotate or flip an image, or scale it to various sizes—handy since DEVONthink itself can't resize graphics, only zoom in or out when viewing them.
    - *Reminders:* These scripts create an event or to do in Calendar (or various third-party programs, such as OmniFocus and Things) based on the selected item in DEVONthink—including a link to the item.
    - *Sheets:* Although I said earlier that DEVONthink's sheets can't do calculations, as spreadsheets can, these scripts add a couple of rudimentary spreadsheet features, such as summing and averaging rows or columns.

> **Note:** DEVONthink has its own Script menu, which appears to the left of the Help menu. You may *also* have a system-wide Script menu on the right side of the menu bar that is available in all apps. (You can enable or disable this menu in Script Editor > Preferences > General.) The scripts above appear on DEVONthink's Script menu; the Application-specific scripts described later in this list appear on the system-wide Script menu.

- **Smart rules scripts:** A smart rule, discussed earlier in this chapter (see Work with Smart Rules) can trigger an AppleScript to run when the rule's criteria are met. DEVONthink includes a number of prewritten scripts for smart rules, stored in `~/Library/Application Scripts/com.devon-technologies.think3/Smart Rules`; again, you can add your own scripts to this folder.
- **Reminders scripts:** These scripts are available as actions that run when a reminder's alarm is triggered (refer back to Use Reminders). Only one example is included: Open

Document (which, as the name suggests, opens a specified document when the alarm goes off). These scripts are stored in `~/Library/Scripts/Applications/Application Name`, and you can add your own if you like.

- **Toolbar Scripts:** You can customize a DEVONthink toolbar to add buttons that run specific AppleScripts. Although DEVONthink includes no prewritten toolbar scripts, you can add your own to `~/Library/Application Scripts/com.devon-technologies.think3/Toolbar`. You must then quit and reopen DEVONthink, and then choose View > Customize Toolbar to add your custom script to the toolbar.

- **Application-specific scripts:** DEVONthink includes numerous scripts that appear on the system-wide Script menu in other applications (such as DEVONagent, Mail, Outlook, and Safari), enabling you to import content of various kinds and formats into DEVONthink. These scripts are stored in `~/Library/Scripts/Applications/Application Name`.

  A few examples for Safari:

  - *Add linked images to DEVONthink:* This script looks for thumbnails on a webpage that link to larger images, and downloads the full-size image files into DEVONthink.
  - *Add links to DEVONthink:* Similar to the last script, this one looks for links on the current webpage and adds each one to DEVONthink as a bookmark.
  - *Add tabs to DEVONthink:* This script adds bookmarks for all open Safari tabs to DEVONthink.

- **Folder Action Scripts:** These scripts (located in `~/Library/Scripts/Folder Action Scripts`) are designed to be attached to folders such that when anything new appears in the folder, DEVONthink automatically imports it (with or without OCR) or indexes it.

DEVONthink 3 also offers a feature called “triggered scripts,” which lets you attach a specially written AppleScript to any item in your database and have that script run whenever you select that item. These scripts can be stored anywhere on your Mac, and DEVONthink 3 does not include any prewritten examples. I can’t think of any action I’d want to trigger automatically upon merely *selecting* an item in DEVONthink, so I won’t say more about this except to mention that you can find details in the documentation (search for “triggered scripts”).

Extra Scripts

Besides the automatically installed AppleScripts, DEVONthink includes 12 optional AppleScripts in the Support Assistant—choose Help > Support Assistant and click the Install Extras link at the bottom of the window to see and install them.

Writing Your Own Scripts

The best way to figure out how to automate something in DEVONthink using AppleScript is to open a related example script in Script Editor and see how it's constructed. To view the complete list of AppleScript commands available in DEVONthink, in Script Editor, choose File > Open Dictionary, select DEVONthink 3, and click Choose. The most interesting terms are in the DEVONthink 3 Suite.

To learn more about using AppleScript generally, including tutorials and example scripts, visit MacOSXAutomation's AppleScript page or the MacScripter website. DEVONthink's documentation also has helpful information about getting started with DEVONthink-specific AppleScripts; see the "Basic AppleScript Terminology" topic. For more on scripting DEVONthink specifically, try the Scripting category within the DEVONtechnologies discussion forum.

Note: DEVONthink 2 supported Automator as well. Although DEVONthink 3 no longer has direct Automator support, you can still embed AppleScript in Automator workflows, giving you a way to control DEVONthink from Automator.

Use Smart Templates

Earlier, in Template, I described how to create documents from prebuilt templates and edit those templates or create your own. I also mentioned a variant called a smart template, which also appears in the Data > New from Template submenu but is composed of AppleScript rather than a simple document with placeholders. I'd like to say a bit more about smart templates here.

Smart Templates enable you to perform any number of complex automated actions in the course of creating a new DEVONthink document. For example:

- The Daily Journal smart template (in Data > New from Template > Productivity) creates a document that includes a quote (fetched from a web service) and the day's news headlines (fetched from another web service).
- The Project smart template (in the same submenu) creates a group tag hierarchy, which can include contact information selected from the Contacts app and a project name that you're prompted to provide.

A smart template can be interactive, asking you to supply information that it then uses when creating your new document(s), tag(s), or group(s); it can also use logic to analyze or process

information and behave differently depending on any of numerous variables, including information found online.

However, unlike smart groups, smart rules, and conventional templates, smart templates are *not* easy to create. They're built almost entirely in AppleScript, and so unless you have a fair bit of facility with the language, creating a smart template that works just the way you want may be challenging.

I suggest, as does the DEVONthink documentation, that you start by opening, examining, and modifying (copies of) some of the existing smart templates to see how things are done. You can find these in subfolders of `~/Library/Application Support/DEVONthink 3/Templates.noindex`; they're the packages with the `.templatescriptd` extension. Right-click (or Control-click) one of these, choose Show Package Contents from the contextual menu, and examine the files inside—especially `Contents/Resources/Scripts/main.scpt`.

Sync DEVONthink Databases

If you have multiple Macs—or a Mac and one or more iOS/iPadOS devices—you'll probably want to use DEVONthink on each one, and that in turn almost certainly means you'll want your data to stay in sync across your devices. We've all become accustomed to near-instant syncing of data such as email, contacts, and calendars. In addition, cloud services like Dropbox and iCloud Drive enable us to keep files and folders in sync everywhere. You can have that same experience with your DEVONthink data.

Although DEVONthink has excellent sync capabilities, they work differently from other apps and services you may have used, and the configuration is a bit unusual. If you're setting up syncing for the first time, there are a few things you'll have to know, but after the initial setup, syncing should be nearly transparent.

> **Tip:** If your goal in syncing DEVONthink data between two Macs is less about having the data on two Macs and more about giving another person access to the data, see the sidebar later in this chapter, Choosing a Sharing Strategy, for tips on different methods of making your DEVONthink data available elsewhere.

Understand Sync Basics

Before you jump in and set up syncing, you should be aware of the numerous choices DEVONthink offers and how they compare. It's worth taking a few minutes to think through your options in advance in order to achieve your desired results.

External vs. Built-in Syncing

As I explained in How and Where Databases Are Stored, even though DEVONthink stores all your documents as individual files on disk, it also keeps a great deal of information in a proprietary database; the database and the files together are kept in a *package*—a folder that looks like a single file. Because of the way databases work, syncing is tricky and dangerous if you try to do it *outside* DEVONthink (for example, by using a sync app such as ChronoSync to sync files over your local network, or by storing your database in a folder that syncs via a cloud service). Making even a small change to a single document changes not only the corresponding document file but also various parts of the database. As a result, if the data is synced externally while the database is open in more than one place, errors and data loss could occur.

However, using DEVONthink itself to perform the syncing is another story altogether. DEVONthink can sync any or all of your databases with any number of other Macs and

iOS/iPadOS devices, and it's safe to make changes with the database open on more than one device—DEVONthink knows how to merge your changes quickly and intelligently.

Sync Locations

Any database can sync to one or more locations (or none, which is the default); you can choose whichever combination best meets your needs. Conceptually, the various destination choices fall into two categories: *direct*, in which a database syncs between two copies of DEVONthink running on different devices; and *indirect*, in which each copy of DEVONthink syncs independently with a *sync store*—a copy of the database stored in central location, such as a file server or cloud service.

Each method has certain implications:

- For direct Mac-to-Mac (or Mac-to-iOS/iPadOS, or iOS/iPadOS-to-iOS/iPadOS) syncing to work, DEVONthink must be running on both devices, which must also be on the same network. If this arrangement is possible, direct syncing is the fastest and most efficient option, and has the lowest risk of conflicts.

- Indirect syncing lets any copy of DEVONthink sync at any time, without regard to whether another copy of DEVONthink is running. As long as each device can reach the sync destination, the devices need not even be on the same network. But because each Mac or iOS/iPadOS device syncs independently, it becomes *slightly* more likely that a given document could change in more than one location between syncs, resulting in a conflict (see Set Syncing Options).

- With either method, you can sync more than two devices. However, each sync operation occurs between a single pair of locations. As a result, in order for any particular change to propagate from one device to another, two sync operations may be required (depending on the timing of the syncs).

DEVONthink uses the term *location* to refer to a sync endpoint, which can be another Mac or iOS/iPadOS device on your local network (if you're doing a direct sync) or the cloud storage destination for your sync store (if you're doing an indirect sync). Here are the location types you can choose, and what you should know about each:

- **Bonjour (direct connection):** This option lets you sync directly with a copy of DEVONthink running on another Mac or iOS/iPadOS device on your local network (or even over a USB cable; see How to Sync by Wire). Although the syncing is bidirectional, one device effectively acts as a server and the other(s) as client(s). You must set up a password on the server and then authenticate with that password on your other devices; this prevents unauthorized users from syncing with your databases.

- **Local sync store:** The desktop versions of DEVONthink can sync a database to any folder you can navigate to in the Finder; typically, you would choose a folder on a local

network server, although you could also use an external hard drive, flash drive, or other storage. After you've synced one copy of DEVONthink to this folder, copies running on other Macs can optionally sync with that same location. Unlike a direct (Bonjour) connection, this requires making a separate copy of your sync data; on the other hand, it also permits syncing when one or more of the devices is offline.

- **Dropbox account:** If you have a Dropbox account with enough free space to hold your database, you can sync to it. You can then sync your other devices to the same Dropbox account. Keep in mind that you can't sync to a Dropbox folder someone else has shared with you; for security reasons, DEVONthink can read and write files only in a single, specific location in your Dropbox. When you set up Dropbox syncing the first time, DEVONthink asks for your Dropbox credentials to authorize access.

- **iCloud:** Assuming you have sufficient storage space in your iCloud account, DEVONthink can use iCloud to hold your sync store, making it accessible to your other devices. Unlike Dropbox, setting up iCloud requires no additional authentication steps. On the other hand, iCloud syncing is sometimes slower (due to Apple's design decisions—that's out of DEVONthink's control), and your initial sync with iCloud may temporarily require lots of extra disk space. Be sure to read Database Size Considerations, ahead, to understand how this works—which may not be what you expect!

- **WebDAV Server or CloudMe:** You can sync your database to a WebDAV server on your local network or on a remote network. You'll have to specify the server address, the path to the desired location on the server, a Store Name (the filename you want to use on the server), your username, and your password. (DEVONthink uses HTTPS and/or a custom port if those are included in the URL.) Because the cloud storage offered by CloudMe is accessible over WebDAV, you can use those as locations for a sync store, and DEVONthink even offers shortcuts to set up those services.

> **Note:** You may have noticed that this list does not include many other cloud providers, such as Google Drive, Amazon Cloud Drive, and Microsoft OneDrive. Even though such services can sync folders on your Mac's disk, that type of external syncing (see External vs. Built-in Syncing) is not reliable for DEVONthink data.

Regardless of how you choose to sync your databases, DEVONthink strongly encrypts your data using AES-256. For direct connections, DEVONthink encrypts the data in transit. For all indirect connections, the sync stores are encrypted as long as you enter an encryption key when setting them up (see Configure Syncing), which I recommend.

Database Size Considerations

As I mentioned earlier in the sidebar How Many Databases Do You Need?, DEVONthink's performance can suffer if a single database grows too large. That applies to syncing

performance too. Although there are no hard limits on database size, depending on variables such as the bandwidth of your internet connection, the sync method you use, and the kinds and sizes of files in your database, databases over a few gigabytes in size (give or take) might sync much more slowly than you like on their initial upload or download—or if you routinely add very large files. If you have large databases and are frustrated by the pace of syncing, splitting them into smaller databases may help.

But syncing *speed* isn't the only thing to worry about when it comes to database size—you should also bear in mind disk space requirements. Direct connections and WebDAV/CloudMe connections don't use any extra space on your Mac for syncing, and local sync stores are typically on network volumes or other external storage. But iCloud does require extra storage on your main disk, at least temporarily—however large your DEVONthink databases are, you'll need that much space *again* for your initial sync, though that space will free up again afterwards. (Dropbox sometimes needs extra space too, but we'll get to that in a moment.) If you have loads of empty space on your disk, there may be nothing to worry about. But if you're highly constrained in your storage space, this fact may affect your choice of sync method.

When you select Dropbox as a sync location, DEVONthink initially copies all your data to Dropbox's servers, and then—assuming you have the Dropbox app installed—the Dropbox app copies all that data *back* to the `Apps/DEVONthink Packet Sync` folder inside your Dropbox. Afterwards, every time you sync, changes in your DEVONthink database—still stored in its original location—are sent to the copy in your Dropbox, while any changes in the Dropbox copy of your database are absorbed into your main copy. The direct connection between DEVONthink and Dropbox means it works even if you *don't* have the Dropbox app installed on your Mac. And it's faster and more reliable than letting Dropbox sync the files externally.

If you leave it at that, the amount of hard disk or SSD space on your Mac used by DEVONthink will double: the original copy of your DEVONthink database will still be in `~/Databases` or wherever you put it, and a second copy will be in your Dropbox folder. (The same goes for any other Macs that use the same Dropbox account.) But you can avoid the storage hit by turning on Dropbox's Selective Sync option for your DEVONthink data, as I explain in Add an Indirect Connection, ahead. This feature lets you pick and choose which of your Dropbox folders are stored locally on any device.

With iCloud, DEVONthink makes local copies of all your files in the iCloud Drive folder; then, after they sync (which may take longer than with Dropbox, as it's handled by macOS), DEVONthink deletes those local copies. Although it isn't quite like Dropbox's Selective Sync, you do get approximately the same end result—but only after syncing is complete. That means you'll need to have at least as much free space on your disk as the size of your database for your initial sync; and afterwards, the amount of storage space used will rise and fall as files are synced and then the extra copies are deleted.

In sum, if you have very little free space on your Mac—or if you want the best syncing performance—you might find Dropbox to be a better choice than iCloud.

Choose Your Sync Method(s)

Which option is best for you? That depends on numerous factors, such as database size (as I just described), which services you have accounts with, and personal preference. I've had the best results personally using direct connections and Dropbox. Although I prefer iCloud Drive to Dropbox is some respects, the current design of the two services makes Dropbox a more flexible and efficient choice for syncing my DEVONthink databases.

Once you've chosen one or more sync destinations for a given database, you can optionally configure DEVONthink to sync automatically, manually, or on a recurring schedule.

Choosing a Sharing Strategy

Suppose a colleague or family member needs access to all or part of your DEVONthink database from time to time. You can accomplish this in numerous ways. Which one is best? It depends on your needs:

- **Sync the databases directly:** If both people have licensed copies of DEVONthink—running on Macs or iOS/iPadOS devices on the same network—and if the other person needs full access to an entire database on a regular basis, then a direct device-to-device sync is most efficient.
- **Sync the databases indirectly:** If both people have DEVONthink but are on different networks, or if you can't guarantee that both copies will be running at once, syncing to a mutually accessible location (such as cloud storage, a shared network volume, or a WebDAV server) is the easiest way to ensure full access to a database.

This chapter covers these first two types of syncing, both of which can also be used with DEVONthink To Go (see Use DEVONthink To Go). However, depending on your needs, a different method of sharing DEVONthink data might work better for you:

- **Use the built-in web server:** If the other person mainly needs to view documents in your database or occasionally create or upload new ones (but not modify existing documents), or when it doesn't make sense to use the disk space and network bandwidth required to sync an entire database to another location, you can Use DEVONthink's Web Server (which requires DEVONthink Server).
- **Share or export the data:** When the other person needs only a single document, or only a handful of documents—and it's not crucial to have access to updated versions of these documents later—you can send them via email (select one or more documents and choose Send by Email from the Actions ⚙ menu), Share Data using the Share pop-up menu, or Export Data and then share it over a network or on physical media of some kind.

Configure Syncing

Syncing is quite easy—it takes much longer to explain it than to set it up! The procedure requires three quick steps: Add a Location, Select or Import Your Database(s), and Set Syncing Options. You must go through these steps on each device you want to sync.

Note: DEVONthink To Go uses the same sync mechanism as the Mac version of DEVONthink, but I don't go into detail about setting up syncing on an iOS/iPadOS device in this chapter. For that, see Configure and Sync DEVONthink To Go in the next chapter.

All the following steps take place in DEVONthink 3 > Preferences > Sync, which initially looks like **Figure 82**.

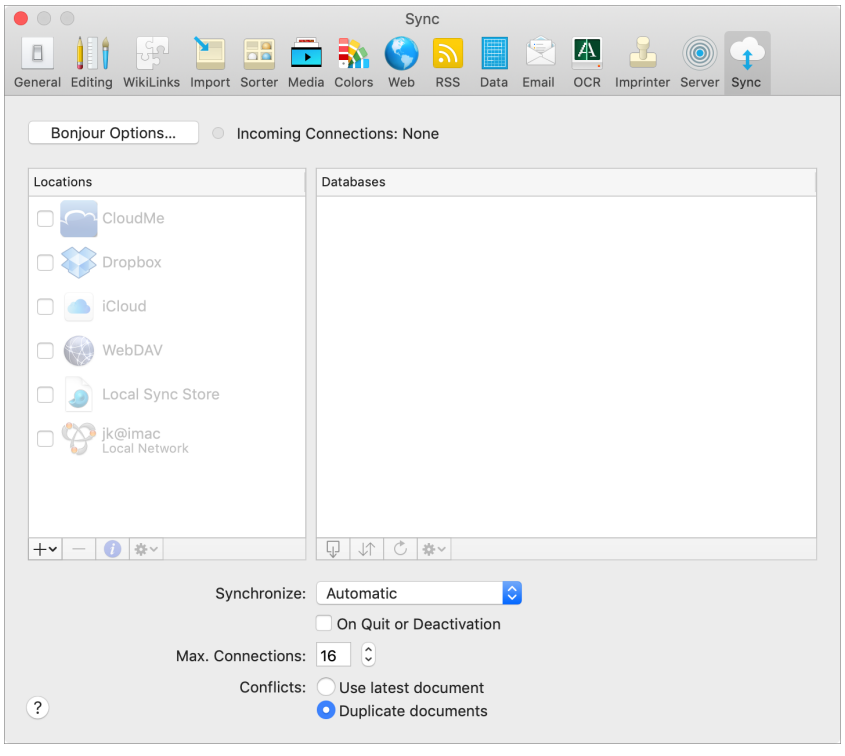


Figure 82: DEVONthink's Sync preference pane looks like this before you configure syncing.

Add a Location

The Locations list on the left side of the Sync preference pane shows all the locations to which you can sync DEVONthink. The list includes any Macs on your local network that are running DEVONthink and configured to accept incoming Bonjour connections, and one instance each of the various other account types. (You can add more, if need be—for example, you can have multiple CloudMe accounts, multiple WebDAV accounts, and so on, though only one iCloud account. You're also limited to one Dropbox *account*, though that account can contain multiple sync stores.)

To add a location, select its checkbox and fill in the relevant details in the dialog that appears. Each location asks for slightly different information, and in particular, the details differ significantly between direct connections (discussed next) and indirect connections such as Dropbox, iCloud Drive, and WebDAV (see Add an Indirect Connection).

Add a Direct Connection

For direct connections, there's not even a checkbox to select until you set up one of your Macs to function as a server (see Set Bonjour Options, just ahead). However, once you've done so, connecting from another device requires little more than entering your password (see Connect to a Local Mac).

Direct connections are different from all the other location types in that you're not syncing all devices to a central location; instead, one device (a Mac, for the purposes of this chapter) functions as a server and your other devices function as clients. Whichever Mac is going to be the server has to be set up before any of the clients. Syncing works the same way regardless of which Mac you choose as the server. If you have one Mac that's on and connected to your network all the time, that one would be a better choice for a server than a Mac that spends a lot of time turned off, asleep, or offline. Other than that, the choice is pretty arbitrary.

Once you've chosen a Mac to function as the server, you must set its Bonjour options (as described next). Then, on the *other* Macs on your network, follow the steps under Connect to a Local Mac.

Set Bonjour Options

On the Mac you want to function as a server, click Bonjour Options and fill in the dialog that appears (**Figure 83**).

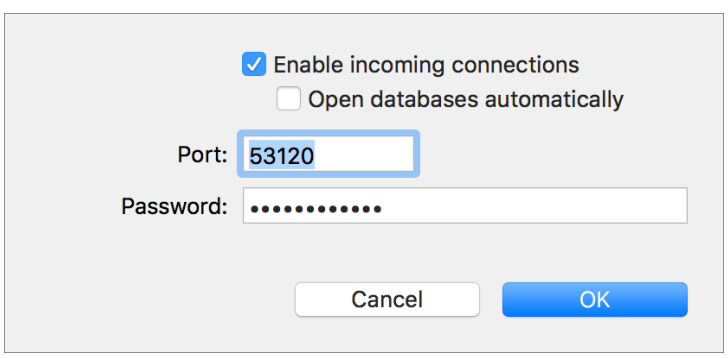


Figure 83: Set up incoming connections in this dialog.

Here are the options:

- **Enable incoming connections:** Select this to permit DEVONthink on this Mac to accept connections from DEVONthink on other devices on your local network. (If this is deselected, then regardless of your other settings, this Mac cannot function as a server.)

- **Open databases automatically:** Once you've set up syncing and selected databases from this Mac on another device, you might (accidentally or intentionally) close one of those databases on this Mac, which would prevent it from syncing to your other devices. To avoid that problem, select this checkbox, which permits clients to request that this Mac open any databases previously set up for syncing when a sync is required.

- **Port:** This is optional. If you leave it blank, DEVONthink picks a random, high number—and that's fine for most users. However, if you want to use a specific port number (perhaps because of a firewall configuration on your network), enter the port number here.

- **Password:** A password is mandatory; it enables DEVONthink to encrypt your data while it's in transit over your network, and prevents eavesdropping.

After you've filled in a password and at least selected the first checkbox, click OK. Once you've done that, this Mac appears in the Locations list as an option for other Macs and iOS/iPadOS devices on your local network. On those devices, you can then proceed to the next topic.

Connect to a Local Mac

Once you have a server set up to receive connections, go to your next Mac, open DEVONthink 3 > Preferences > Sync, and select the checkbox next to the first Mac's name in the Locations list. In the Password alert that appears (**Figure 84**), type the password you set up on the server Mac. (You don't even need to press Return or click OK!) That's it—you're connected. Proceed to Select or Import Your Database(s).

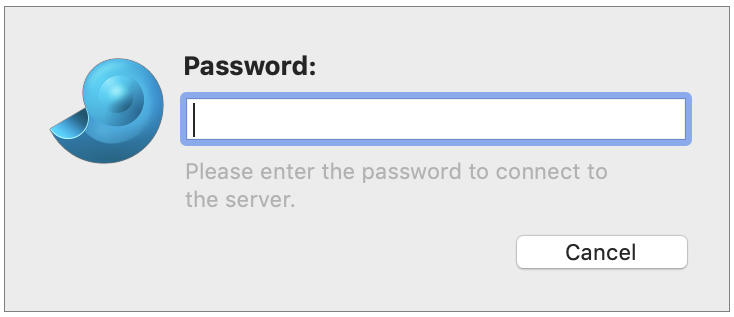


Figure 84: Enter the password you set up on the server Mac here.

Don't Do Mutual Syncs

Let's say you've set up Mac A as a server (by selecting "Enable incoming connections" in Bonjour Options), and you've set up Mac B to be a client (by selecting Mac A in Mac B's Locations list). You may be tempted to do the reverse, too—enable incoming Bonjour connections on Mac B, and select Mac B as a sync location on Mac A. Don't do that!

All syncs in DEVONthink are bidirectional. So it's unnecessary—and indeed, a bad idea—for two Macs to function as both server and client *for each other*. Doing so won't solve any problems, but it will decrease performance, and may increase the likelihood of sync errors.

Add an Indirect Connection

For indirect connections (all locations other than direct connections), after you select the appropriate checkbox in the Locations list, you must specify account and sync store settings in a dialog (**Figure 85**).

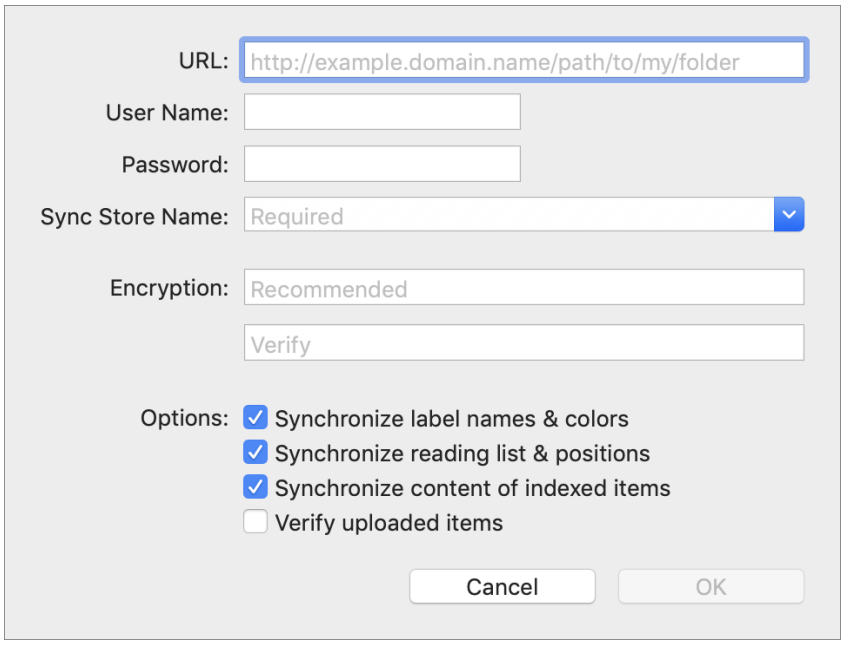


Figure 85: This dialog appears after you select WebDAV in the Locations list. (Other locations display variations on this dialog with fewer controls.)

The fields and controls in this dialog vary somewhat from one location to another. You may see the following:

- **URL:** For WebDAV locations only, enter the server's full URL. (For local sync stores, in place of a URL, a standard file selection dialog appears; use its menu to select a location.)

- **User Name and Password:** For WebDAV locations, enter the credentials you use to log in.

- **Sync Store Name:** Enter a name for the sync store—that is, the package that's stored in your Dropbox, on a local server, or wherever you choose—that serves as the central repository for syncing between this Mac and other devices. (For local sync stores, the field is labeled Save As.)

  What sort of name should you enter? Well, the sync store can hold sync data for multiple databases if you like, so you may not want to name it after a particular database. It can also sync data from many devices, so you shouldn't name it after your Mac. In fact, the only reason the name might matter is if, for some reason, you wanted to set up multiple sync stores in the same location. So, enter anything you like here, though for compatibility reasons, it's safest not to include spaces or punctuation other than hyphens and underscores. (I named mine HomeDepot. As in, you know, a store where you can buy sinks. Because that's how I roll.) Once you've set up a sync store for one device, you should enter *exactly* the same name when setting up additional devices.

- **Encryption:** If you want your sync store to be encrypted—*and you absolutely do!*—enter and verify a password in the fields provided.

- **Options:** The bottom of the dialog has a series of checkboxes that let you specify sync options for this sync store:

- *Synchronize label names & colors:* Choose whether to sync label names and colors (see the sidebar Using Labels and Flags) using this sync store. It's optional because this is a global preference, not a database-specific preference, and you may want different copies of DEVONthink to use different label names or colors.

- *Synchronize reading list & positions:* Select this to synchronize reading and playback positions along with document contents. (This applies to PDF, plain text, rich text, Markdown, audio, and video files.)

- *Synchronize content of indexed items:* By default, DEVONthink syncs the content of any indexed items (that is, items whose original files are not stored within your DEVONthink database), so you can view and work with the files on your other devices. However, if you deselect this checkbox, DEVONthink syncs only their metadata, not the original files themselves.

Note: This option must be selected if you'll be syncing your data to a mobile device running DEVONthink To Go.

- *Verify uploaded items:* Select this checkbox to make DEVONthink verify the integrity of each file after it has uploaded to another device. This option is usually unnecessary (and may slightly increase the amount of time each sync requires), but if you experience missing or corrupted files during syncing, you can enable it to confirm that each transfer took place correctly.

Once you've filled in the dialog with all required information, click OK. DEVONthink copies your sync store to the location you selected.

You can then move on to Select or Import Your Database(s)—*unless* you added a Dropbox location, in which case you should complete a few additional steps first:

1. If your web browser opens automatically to a sign-in page for Dropbox, enter your Dropbox username and password, and click Sign In. (If your browser does not open automatically, skip to step 5.)

2. If you have Dropbox's two-factor authentication enabled (always a good idea, though not a requirement to sync with DEVONthink), you'll be prompted to enter your authentication code. Do so and click Submit.

3. Click Allow to give DEVONthink access to its own folder (and no other folders) in your Dropbox.

4. Your browser should return you to DEVONthink to finish the setup process; if it doesn't, you can switch back manually.

At this point, DEVONthink begins copying your sync store to Dropbox—but you aren't done yet. I strongly recommend that you use Dropbox's Selective Sync feature to avoid storing a local copy of the synced data, as I described in Database Size Considerations. To do this, continue with the remaining steps.

5. Go to the Dropbox menu on the menu bar.
6. Click the tiny down arrow in the upper-right corner of the Dropbox popover next to your account photo, and choose Preferences from the pop-up menu.
7. Click Sync, then "Choose folders to sync" under Selective Sync.
8. Navigate to Apps and deselect the DEVONthink Packet Sync checkbox (**Figure 86**).

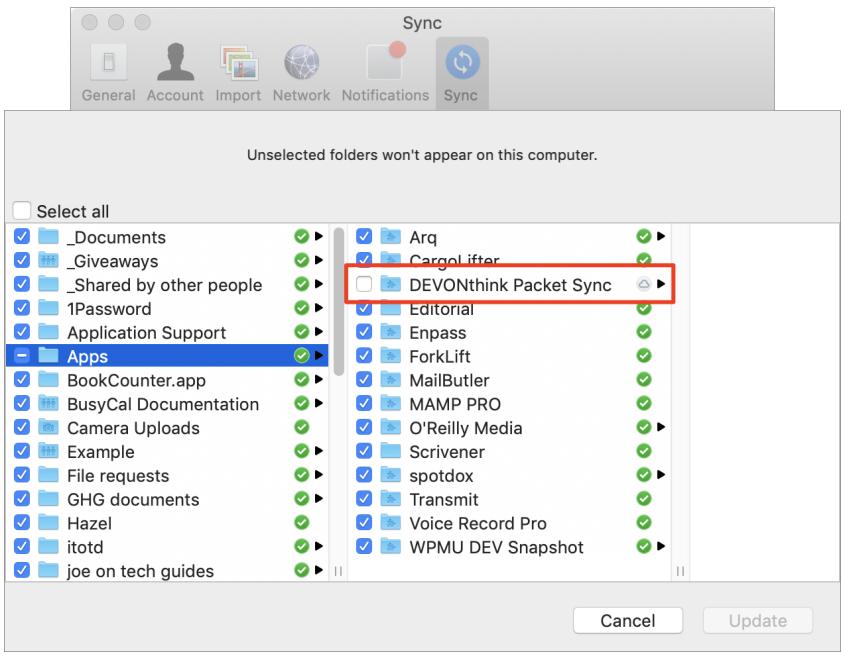


Figure 86: Deselect the DEVONthink Packet Sync checkbox to avoid making a duplicate copy of your sync data on your Mac.

9. Click Update.

Dropbox may take several minutes to remove the local copy of that folder.

Note that even though this procedure removes the sync folder from your Mac, it's still stored on the Dropbox servers, so you'll need to be sure you have enough storage space in your account to hold it. And, you'll have to repeat this procedure on each of your Macs.

Note: For most users, a single sync location is adequate. However, if you need to add more than one account of a particular type (as in, two Dropbox locations), you can click the plus button on DEVONthink's Sync preference pane and choose the desired account type from the pop-up menu.

Select or Import Your Database(s)

Now that you have a location (or more than one) configured, you must next determine which databases will sync to that location. You can sync all your databases to the same

location, each to a different one, or certain databases to each of several locations—whatever you like. The most common scenario is to sync any given database to just one location.

With your location selected in the Locations list on the left, look in the Databases list on the right. (**Figure 87** shows the list as it might appear for a direct connection.)

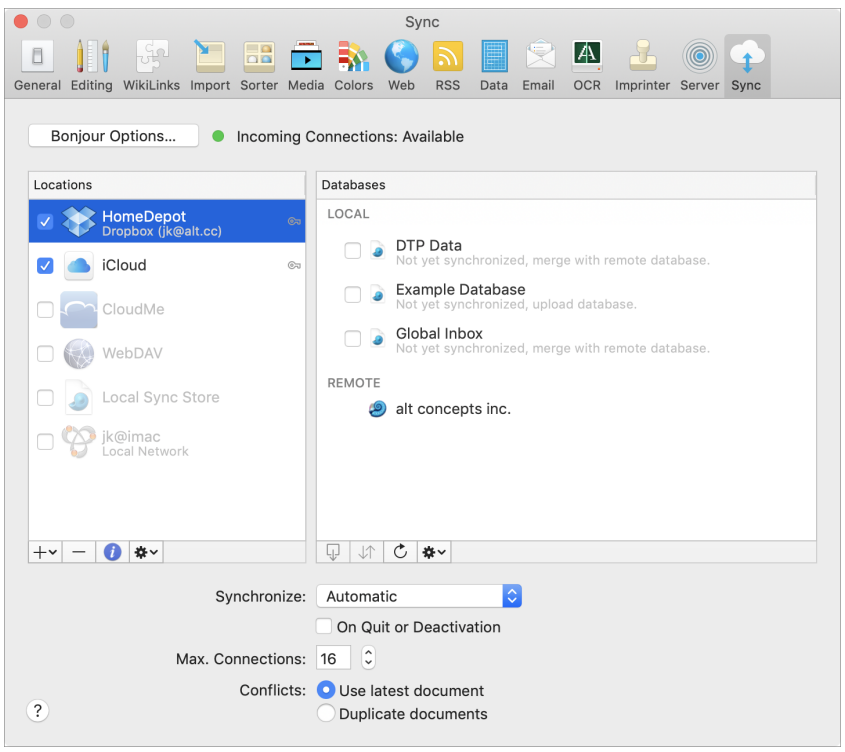


Figure 87: With a location selected (that is, not just checked, but also highlighted) on the left, select which databases to sync with that location on the right.

The LOCAL portion of the Databases list contains the databases currently open on this Mac. In the REMOTE portion, for direct connections, you'll see databases open on the other Mac that can be imported (or opened, if they already exist on your Mac but are closed); for indirect connections, you'll see databases in the sync store that do not already exist on this Mac. (If you previously synced a database between these two Macs in some other way—using file sharing, an external sync utility, or the previous version of DEVONthink's syncing capability, for example—and it's open on both Macs, it appears in the LOCAL section.)

Sync a Local Database

To sync a database in the LOCAL category, simply select its checkbox. If the location is anything but a direct connection, DEVONthink immediately begins uploading your data to the sync store (or, if the database already exists in the sync store, merging it).

> **Note:** Because DEVONthink treats your global Inbox as a separate database, you must select Global Inbox separately from any other databases.

Sync a Remote Database

To sync a database in the REMOTE category, you must import it, thus creating a local copy. To do so, double-click the database in the REMOTE portion of the list. Leave the database's name as it is in the remote location, navigate to where you want it to be stored, and click

Create. DEVONthink imports the database, enables syncing, and begins the sync process immediately.

> **Tip:** To import a remote database as an *encrypted* database, instead select it in the REMOTE portion of the list, right-click (or Control-click) it, and choose Import Encrypted Database from the contextual menu.

Use Additional Sync Controls

Under the Databases list are two additional icons you may find useful:

- **Sync now:** Click the Force Sync ⇵ button to force an immediate sync, if syncing is not set to Automatic (see just ahead).
- **Refresh:** If the list of databases on this Mac, on the remote Mac, or in the sync store changed recently and the current selections don't appear here, click the Refresh ↻ button to refresh the view.

Set Syncing Options

The final three syncing options can be set at any time (including before setting up locations and databases). These settings, at the bottom of the Sync preference pane, apply to all locations and databases:

- **Synchronize:** When this pop-up menu is set to Automatic, the default, DEVONthink frequently checks for changes in both remote and local copies of each database and syncs them with the other location soon after they occur. If you prefer to sync on a fixed schedule, you can instead choose "Every minute," "Every 5 minutes," "Every 15 minutes," "Every 30 minutes," Hourly, or Daily from this menu. Or choose Manually to sync only when you Click the Force Sync ⇵ button. If you also want DEVONthink to sync when you quit the app, even if it's not otherwise time to do so, check On Quit or Deactivation. (This can avoid surprises of last-minute changes that weren't synced, though it also prevents DEVONthink from quitting instantly.)
- **Max. Connections:** DEVONthink can open up to 16 multiple, simultaneous connections to any location (8 for Dropbox), enabling it to copy multiple documents at the same time. If you suspect that DEVONthink is slowing down your network because it has too many connections active, you can reduce this number.
- **Conflicts:** If a document changes both locally and remotely between syncs (a rare occurrence when Synchronize is set to Automatic and you have a fast network connection), this set of controls determines what will happen. If you select "Use latest document," the more recently changed document will overwrite the older one. If you select "Duplicate documents," both copies sync in both directions—preventing data loss,

but forcing you to manually sort out, later on, which version of each document you want.

Use DEVONthink To Go

If you have an iPhone, iPad, or iPod touch, you can take your DEVONthink data with you and work with it when you're away from your Mac. For that matter, you can use the majority of DEVONthink's features on the go even if you don't have a Mac at all! To do this, you'll need an iOS/iPadOS app called DEVONthink To Go, which costs $14.99. (An optional in-app purchase for $7.99 adds Pro features, including metadata-only syncing; support for viewing email messages, sheets, and `.csv` or `.tsv` documents; and annotating PDFs.)

Although even DEVONthink To Go (at version 2.7.7 as of publication time) doesn't have all the features that the desktop versions of DEVONthink do, it does have a surprisingly rich range of capabilities for viewing, creating, capturing, and managing information directly on your iOS or iPadOS device.

If you have no iOS or iPadOS device, or if you're not interested in taking your DEVONthink data with you, there's nothing to see here—move on to the next chapter, Get Information Out of DEVONthink. Otherwise, keep reading to learn about using this extremely handy tool.

Get to Know DEVONthink To Go

Just as DEVONthink for Mac is a complex product, DEVONthink To Go is quite deep, with a huge number of features that may not be obvious at first glance. Detailing all those features would require its own book, and I can offer only an overview in this chapter. I do, however, suggest you download the user handbook for DEVONthink To Go, which is available in PDF, EPUB, and Mobipocket formats.

So, what can DEVONthink To Go do? It appears to have, at a rough estimate, about 75% of the capabilities of the desktop versions of DEVONthink. For example, here's a *partial* list of what you can do in DEVONthink To Go:

- Sync data from DEVONthink for Mac (or DEVONthink To Go running on other iOS/iPadOS devices) via Dropbox, iCloud, CloudMe, WebDAV, or a Bonjour connection over Wi-Fi
- View any document type supported by iOS/iPadOS
- Capture data from other apps (such as bookmarks, PDFs, text, and images) to a specific database or your global Inbox
- Create new databases, groups, and tags

- Create and edit documents in plain text, rich text, Markdown, and formatted note formats; rotate and apply filters to graphics; annotate PDFs; and convert (most) documents to other formats
- Move, duplicate, replicate, group, tag, or delete items
- Use complex search criteria to find your documents
- Share documents using the share sheet

However, you should also be aware of some limitations compared to the desktop versions of DEVONthink. Among the features DEVONthink To Go *does not* include are the following:

- Indexing documents stored elsewhere on your iOS/iPadOS device
- Creating new smart groups, or using smart groups created on your Mac (but you can tap Edit on the home screen to use any of 18 built-in smart groups)
- Editing RTFD documents (RTF with graphics)
- Performing OCR on photos or scanned documents
- Splitting or merging documents
- The Concordance feature

In short, DEVONthink To Go lets you view and manage your DEVONthink databases effectively with an iOS/iPadOS device, and can also function as a standalone tool for gathering and organizing information—but if you're a power user, you'll most likely find that it can't replace the desktop versions of DEVONthink.

Configure and Sync DEVONthink To Go

Assuming you want to use DEVONthink To Go mainly to store copies of documents from your desktop version of DEVONthink, you should configure syncing, and perform your first sync, before doing anything else.

As in the desktop versions of DEVONthink (see Sync DEVONthink Databases), sync configuration involves three elements—first add a location, then select databases, and finally (or whenever you prefer) set syncing options.

Add a Location and Select Databases

To add a location and select databases to sync in that location:

1. If you're not already on the home screen (where the global Inbox, smart groups, and databases live), tap the arrow in the upper-left corner of the screen until you get there.

2. Tap the Settings icon.

3. In the Sync section, next to Locations, tap Edit Locations.

> **Note:** You can also set up your iOS/iPadOS device to be a sync server; tap Bonjour > "Enable incoming connections" to do so. This feature works similarly to the equivalent Mac version; see Set Bonjour Options.

4. Tap the green plus icon next to the location type you want to add. (If you already have a location specified, tap Edit to see the list of locations.) For Dropbox accounts, follow the prompts to authenticate; for direct connections, enter the password when prompted.

5. For indirect connections (such as Dropbox, iCloud, and WebDAV), enter the requested information, including the sync store name and password; and, if applicable and desired, turn on Verify Uploaded Items. If you already set up a sync store on another device, use its name and encryption key. (Refer back to Add an Indirect Connection for details on these options.)

6. If you've enabled the Pro features of DEVONthink To Go, tap Always to download full copies of every document, or On Demand to sync only metadata (with full documents available at a tap).

> **Note:** If you choose On Demand here, you can override that setting for a given database or group, so that just that subset of your files sync all the time; see the sidebar On-Demand Syncing, ahead.

7. Select whether you want to sync "Labels and Colors" and/or "Database Properties" (both on by default; again, see Add an Indirect Connection).

8. Tap Save.

At this point, your location has been created, and you need only select which databases to sync in that location:

1. Tap the location name.

2. Turn on the switch for each database in this location that you want to sync.

DEVONthink To Go starts syncing your data. While that's happening, you can tap outside the location window to perform other activities in DEVONthink To Go.

> **Tip:** If you're using an iPhone or an iPad with a cellular radio, you might want to prevent DEVONthink To Go from syncing over a cellular connection. To do so, go to the main iOS/iPadOS Settings app, tap DEVONthink, and turn off Cellular Data.

Set Sync Options

Either before or after you set up locations and select databases, you can configure sync options, which are similar to those in the desktop versions of DEVONthink (refer back to Sync DEVONthink Databases):

1. If you're not already in the Settings window, go to the home screen of DEVONthink and then tap the Settings icon.

2. Set the following options as you prefer:

    - **Conflicts:** Tap an option to choose what happens if a document changes both locally and remotely between syncs. If you select Newest, the more recently changed document overwrites the older one. If you select Duplicate, both copies sync in both directions—preventing data loss, but forcing you to manually sort out, later on, which version of each document you want.

    - **Schedule:** Tap Automatic (the default) to make DEVONthink watch for changes and upload or download new or changed documents automatically (at least once per minute in the case of iCloud). Or tap Manually to sync only when you tap the Cloud icon or swipe downward to initiate a sync.

    - **Keep:** This slider is applicable only if you have enabled Pro features; and even then, only in cases where you've selected On-Demand Syncing. If it's set all the way to the right ("Keep all"), DEVONthink To Go keeps local copies of all downloaded files. If you want DEVONthink To Go to purge the contents of less-recently-used files (keeping only the metadata, so you can re-download the files as needed), move the slider to the left (to "Keep 100 items," "Keep 250 items," "Keep 500 items," or "Keep 1000 items"). DEVONthink purges the contents of any older files over that number.

3. Tap the X icon to close the Settings window.

Your new sync options apply immediately.

On-Demand Syncing

If you've enabled DEVONthink To Go's Pro features, you have the option to sync only the metadata for your files rather than all their contents (saving a great deal of storage space and making syncing go much quicker). Once you've done this, when you select a document that hasn't yet been copied to your mobile device, you can tap a Download link to download a local copy immediately.

You may want to use on-demand syncing as a default setting for your location but override it for particular databases or groups that you want to sync all the time. (However, if an entire location is set to Always, you can't override that setting for individual databases or groups.) To change your on-demand sync settings:

- For a *location*, tap Settings > Locations > Edit and tap the Edit icon next to a location name; then tap Always or "On demand" and tap Save.
- For a *database* or *group* open the database or group, and at its top level, tap the Info icon. Then tap Always to keep everything in that database or group synced or "On demand" otherwise.

Find Your Way Around

Like most iOS/iPadOS apps, DEVONthink To Go has a predictable, hierarchical interface, which reconfigures itself depending on the size and orientation of your device's screen. You should be able to navigate it without much difficulty. However, I would like to bring a few less-than-obvious things to your attention.

The Home Screen

The home screen (the top level of DEVONthink To Go) is special—that's where you find your global Inbox, smart groups, and databases; and it's also the only place where you see the Settings icon. If that's where you want to be, tap whatever text is in the upper-left corner of the screen until you get there.

On the home screen, tap Edit in the upper-right corner to display additional smart groups, reorder smart groups, or delete databases.

List Views

In other list views (that is, the top level of a database, or the contents of any group), tap the View Options icon to display options for sorting the list (by name, kind, date [tap repeatedly to cycle among Added, Created, Modified, and Visited], or size—ascending or descending), filtering it (displaying only flagged and/or labeled items), and toggling the display of details and hidden items.

Tap Edit to reveal controls you can use to select one or more items. Having selected them, you can click the Organize icon to move, replicate, duplicate, group/ungroup, or delete them; or, if a *single* item is selected, tap the Share icon to display the share sheet. (Note that the item must be downloaded to your device before you can share it, duplicate it, or move it to another database.)

Searching

To search for a document in DEVONthink To Go, look for the search field at the top, and if you don't see it, swipe downward on the list to reveal it (just as in Mail for iOS/iPadOS). Enter the text you're searching for. If you're anywhere other than the home screen, you can tap "All databases," "This database," or "This group" to narrow your search to that location.

> **Note:** Just as in the desktop versions of DEVONthink, you can use parentheses, quotation marks (to search for a phrase), Boolean operators (`AND`, `OR`, and `NOT`), and the word `NEAR` when constructing your searches. You can also add an asterisk `*` at the end of a partial word as a wildcard to find matches that begin with the characters you entered. (The asterisk is implied for partial matches while typing, but must be entered explicitly to aid in matching after you tap Search.)

You can also search within the text of an open PDF document (sorry, other formats aren't supported) by tapping the Search icon.

Add Items to DEVONthink To Go

In addition to items you've synced from your Mac or a different iOS/iPadOS device, you can add items of many kinds to DEVONthink To Go right on your iOS/iPadOS device. The two most common approaches are creating a new document (or group, or other item) within DEVONthink To Go (discussed next) and adding content from other apps using the Clip to DEVONthink extension (see Use Clip to DEVONthink).

Create and Edit Content

To create a new document or other item in DEVONthink To Go, navigate to the location where you want the document to be stored and tap the plus icon. A panel appears, which may show just a list of item types (on smaller screens) or item types plus an editing area (on larger screens). Select an item type from the list of choices, and then use the editing view to fill in the details. Your choices are:

- **Text:** Create a document in plain text, rich text, Markdown, or formatted note formats. Fill in the title and body of the document, and optionally apply metadata (see Apply Metadata, ahead, for details). Then click the tiny right arrow › in the upper-right corner of the editing view, tap the name of the format you want to use, and tap Done.

> **Note:** If your clipboard already contains text copied from another app, DEVONthink prefills it in a Text document. If you don't want to use it, then on an iPad, just tap a different document type followed by Delete. On an iPhone, tap the left arrow › icon in the upper-left corner of the panel followed by Delete; then tap a different document type.

- **Media:** Tap New Photo (to take a photo), Existing Photo (to add a photo already in your Photos library), Photo from Clipboard (only if there already is a graphic on your

clipboard), Last Photo Taken, Video Note (to record a new video), or Voice Note (to record audio).

- **Bookmark:** Enter a name and URL for the bookmark, and optionally apply metadata.
- **Sheet:** Assuming you've made the in-app purchase of the Pro features, you can add and edit sheets. After tapping Sheet, tap the Add Heading ⊕ icon and type a name. Press Return and repeat as needed. Then click the tiny right arrow › in the upper-right corner of the editing view, enter a name for the sheet, and tap Done. DEVONthink To Go creates a new, empty sheet in that location; tap it to open it. To edit a table, tap Edit. You can then double-tap a cell to change its contents, or use the controls on the floating toolbar to select, add, and delete columns and rows, among other actions.

> **Note:** The current version of DEVONthink To Go provides no way to change column types or formatting, as the desktop versions of DEVONthink do (see Sheet).

- **Tag:** Type a tag name. (Normally, you create tags in the process of applying them to existing items, but if for some reason you need to create a standalone tag, this is how you do it.)
- **Group:** Type a group name and optionally apply metadata.
- **Database:** Type a database name. To protect the database data during syncing with a password, turn on Protect with Password, tap Proceed after reading the warning, enter a username, and enter and confirm a password. This does not encrypt or lock the database; it only encrypts data in transit during syncs.

After filling in the required information, tap Done.

You can also edit plain text, rich text, formatted note, and Markdown files, plus (to a limited extent) graphics—whether or not you created them in DEVONthink To Go. To do so, select the document and either tap in the document body or tap Edit at the top of the screen. When you're finished making changes, tap Done. (Note that, for graphics, your only options are to rotate the image and apply filters using the icons at the bottom of the screen.)

It's All About Location

When you create any new document in DEVONthink To Go, the document can automatically record your geographic location—where you were when you created it—as metadata. (In order for this to work, you must have agreed to let DEVONthink To Go know your location when it asked—if you're unsure, open the Settings app, tap DEVONthink > Location, and make sure While Using the App is checked.) You can later see this location by opening a document, tapping the Info ⓘ icon, and looking in the Geolocation field.

Use Clip to DEVONthink

In iOS and iPadOS, Clip to DEVONthink is a system-wide extension that can add an icon to the share sheet in nearly any app. By tapping that icon, you can capture information from elsewhere on your device and add it to DEVONthink.

Before you use Clip to DEVONthink, you should make it more easily accessible—this step is mandatory in iOS 12 and optional (but a good idea) in iOS 13/iPadOS 13:

1. Open a document or webpage in any app that supports share sheets (such as Safari).
2. Tap the Share icon, swipe the row of app icons (that is, the top row of icons in iOS 12) toward the left, and tap More.
3. Enable the extension:
    - In iOS 13/iPadOS 13, tap Edit. Then scroll down until you find DEVONthink. Make sure its switch is turned on, and tap the plus icon to add it to the Favorites list at the top.
    - In iOS 12, find Clip to DEVONthink in the list and turn it on.
4. Use the handle on the right to drag it closer to the top (which means it will appear closer to the left in the list of icons in the future).
5. Tap Done.

Once you've done this, you can use almost the same procedure to capture information:

1. While viewing content you want to capture in to DEVONthink To Go, tap the Share icon.
2. Tap the DEVONthink (or Clip to DEVONthink) icon. (In iOS 13/iPadOS 13, if you did not add DEVONthink to your Favorites list, you can instead swipe to the left, tap More, scroll in the list until you find DEVONthink, and tap it.)
3. In the panel that appears, you can optionally edit the document's name and metadata. The Database line indicates which database the item will be stored in; to pick a different one, tap the database name and then select a different database or Global Inbox.
4. Tap the right arrow icon.
5. Tap the format in which you want to capture the document—Bookmark, Web Archive, Web Archive (clutter-free), Markdown, or Markdown (clutter-free)—and tap Done.

The extension puts the document in the inbox of the selected database (or in your global Inbox).

Importing PDFs from Other Apps

Neither the Clip to DEVONthink extension nor browser bookmarklets can send documents to DEVONthink To Go in PDF format (as they can on a Mac). However, there are a couple of easy workarounds.

One way is to use the Make PDF shortcut in the Shortcuts app. Tap Share followed by that shortcut to make the PDF; then tap Share again followed by DEVONthink or Clip to DEVONthink. (I talk about other ways of using Shortcuts with DEVONthink ahead in the sidebar Use Shortcuts with DEVONthink To Go.)

Another way is to tap Share followed by Print. Then pinch out to expand the thumbnail at the bottom of the page so it fills the whole screen. Now tap the Share icon again followed by DEVONthink or Clip to DEVONthink. This extra step causes the document to be sent to DEVONthink as a PDF.

Manage Documents

Once you have documents in DEVONthink To Go—whether you synced them from your Mac or added them manually on your iOS/iPadOS device—you can do quite a few things with them. Here are some of the most useful examples.

Organize Files and Groups

With a single document or group open—or with one or more items selected in a list view in Edit mode—tap the Organize icon to display a popover (**Figure 88**) with the organizational options available. (Not all options apply to every item.)

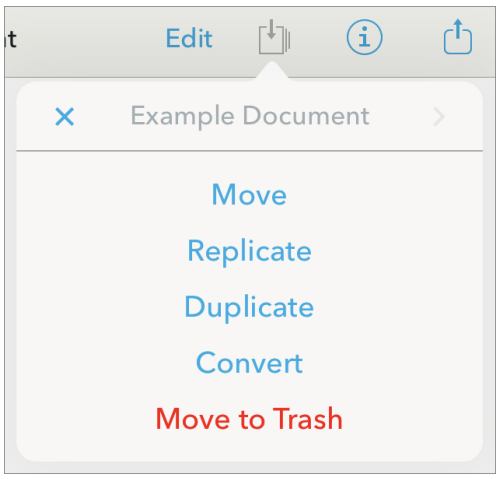


Figure 88: This popover displays whichever organizational commands are relevant to the selected item(s).

Your potential choices are:

- **Move:** Navigate to the location where you want to move the item and tap Move.

Note: Move and Duplicate require the documents to reside locally on your device.

- **Replicate:** Navigate to the location where you want to create the replicant and tap Replicate.

- **Duplicate:** Navigate to the location where you want to copy the item and tap Duplicate.
- **Convert:** Tap Convert followed by the format you want to use. (The options are Formatted Note, Markdown, Plain Text, or Rich Text—but not all formats apply to every source document.) DEVONthink To Go makes a copy of the document in the same location, but with the new format. (If you were editing the document, the original version remains open.)
- **Share:** This option appears only on small-screen devices, where the regular Share icon doesn't fit on the screen; it opens the share sheet.
- **Download:** For documents in groups, databases, or locations configured to use on-demand downloads, tap this to download the document.
- **Move to Trash:** Move the item to the Trash.

Tip: In any list view, you can swipe left on an item's name to reveal buttons for Trash, Flag, and More (which brings up the Organizer popover)—this is much like the comparable gestures in Mail for iOS/iPadOS.

Use Grid Mode to Organize Documents

On an iPad or a larger-screen iPhone, while in any list view, you can tap the blue number to the right of a group name (which indicates how many item the group contains) to display the group's contents as a grid of thumbnails.

You can then touch and hold an item and drag it to a new location. If you drag a file onto another file, DEVONthink To Go makes a group containing those two files. (In other words, this is much like moving and grouping apps on the Home screen.)

Apply Metadata

Any document or group in DEVONthink To Go can have various kinds of metadata, just as in the desktop versions of DEVONthink. To apply this metadata to the currently open group or document, tap the Info icon or press ⌘-Shift-I to open the Info popover (**Figure 89**).

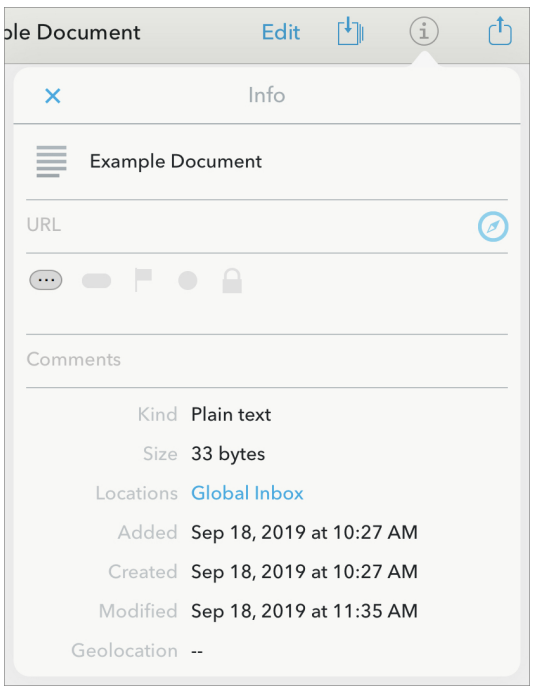


Figure 89: Apply metadata such as tags and labels in this popover.

You can then specify or edit the following:

- **Name:** Tap to edit the document or group name.
- **URL:** If the item is a URL, this field holds the bookmark's location. For all other item types, you can optionally fill in any URL that's relevant to it. Tap in the URL field to type or paste the URL. To open the URL in Safari, tap the Safari icon.
- **Tags:** Tap the Tags icon, then type one or more tags. (After you type at least three characters, suggestions for matching tags may appear.) After typing a tag, tap Return; this turns it into a token recipe.
- **Label:** Tap the Label icon and then use the selector that appears to apply a predefined label (such as To Do, Done, or Important). The Label icon then assumes the color of the corresponding label: .
- **Flag:** Tap the Flag icon to flag the item. The icon then turns orange: . Tap it again to remove the flag.

> **Note:** For more on labels and flags, see the sidebar Using Labels and Flags.

- **Unread:** Tap the Read icon to mark the item as unread. The indicator then turns blue to show that it's unread; tap it again to mark it as read.
- **Lock:** To make the item read-only, tap the Lock icon, which then turns magenta: . Tap it again to unlock the item, making it editable.
- **Comments:** To add a comment, type in the Comments field.

Annotate PDFs in DEVONthink To Go

The Pro package adds PDF annotation features to DEVONthink To Go. (If you haven't already purchased the Pro package, you can do so by navigating to the home screen of DEVONthink To Go, tapping the Settings icon, and then tapping Manage next to Premium Features.)

With a PDF open in DEVONthink To Go, tap Edit. A narrow vertical toolbar appears at the left with icons for various types of annotation actions (much like those in the desktop versions of DEVONthink):

- **Text Highlights:** Touch and hold Highlight and then tap an icon to select a tool with which you can add a background color, underline, wavy underline, or strikethrough to text that you drag over with your finger.
- **Annotations:** Touch and hold Text and then tap an icon to select a tool with which you can add a text annotation, callout, or signature.
- **Note:** Tap the Note icon and then tap in the document to add a note.

> **Note:** Depending on screen size and orientation, some of these icons may be grouped with others (in various configurations); touch and hold any icon with a tiny arrow in the lower-right corner to see other tools.

- **Pen:** Tap the Pen icon to draw with a pen on the PDF.
- **Highlighter:** Tap the Highlighter icon to draw with a highlighter on the PDF.
- **Shapes:** Tap and hold Shapes and then tap an icon to select a tool with which you can draw arrows, lines, squares, circles, and other shapes.
- **Photo:** Tap Photo and then tap either Camera or Photo Library to insert a graphic on top of the PDF. Or, tap and hold Photo and then tap an icon for media, stamp (like "Approved" or "Sign Here"), clipboard, link, or audio recording.
- **Erase:** Tap Erase to activate the eraser tool, with which you can wipe away annotations you made with the pen or highlighter.
- **Select:** Tap Select to draw a selection rectangle, which selects any existing annotations.

In addition to all these tools, you can select text in a PDF to display the standard iOS/iPadOS pop-up toolbar with additional options.

Use Shortcuts with DEVONthink To Go

The Shortcuts app in iOS and iPadOS offers powerful automation capabilities, and DEVONthink To Go can interact with Shortcuts in a variety of ways. For some ideas to get you started, visit the MacStories Shortcuts Archive and search on that page for "DEVONthink."

Examples of shortcuts provided there include DEVONmenu, which gives you an easy way to import a wide variety of files; DEVONimage, which lets you save images from various places into DEVONthink To Go; and DEVONsearch, which lets you search your database from a shortcut.

To learn much more about using Shortcuts, read *Take Control of Shortcuts* by Rosemary Orchard.

Configure DEVONthink To Go Settings

You can adjust the behavior of numerous DEVONthink To Go features. To do this, navigate to the home screen of DEVONthink To Go and tap the Settings icon. There, you can change the following:

- **Premium Features:** If you haven't already purchased the Pro package, tap Manage to do so.
- **Security:** Optionally require a passcode (possibly along with FaceID or Touch ID) to access your DEVONthink To Go data, and configure how long the app should wait before requiring it.
- **Sync:** See Set Sync Options, earlier, for a description of these settings.
- **Groups:** Turn on "Keep on top when sorting" to put all groups higher on lists than individual documents.
- **Documents:** The following options are available:
  - *Plain Text Size:* Drag the slider to set the font size for plain text documents.
  - *PDF scrolling:* Tap an icon for left-right or up-down scrolling while in PDFs.
  - *Continuous:* Turn this on to scroll PDFs continuously; turn it off to scroll a full page at a time.
  - *PDF pages:* Tap Automatic to let DEVONthink To Go display two PDF pages side-by-side if space permits; tap Single to view only a single page at a time.
- **Editing:** Turn on or off the following text editing features:
  - *Automatic Caps:* Capitalize the first letter typed after a period and a space.
  - *Spelling Correction:* Use the iOS/iPadOS spelling correction feature as you type.

    - *Data Detectors:* Look for, and highlight, text that might be dates, phone numbers, addresses, and so on (for ease of adding the information to Contacts, Calendar, and the like).

- **TextExpander:** If you have TextExpander touch installed, tap Update to make any recently added snippets available in DEVONthink To Go.

- **Backup data to iCloud:** Enable this to make a backup of your database that's accessible to the Files app.

In addition, there are a few system-level settings you can adjust in Settings > DEVONthink; there may be more or fewer options here depending on your device and how you've used DEVONthink To Go so far:

- **Location:** To enable DEVONthink To Go to record the location where a document was created, make sure this is set to While Using the App. To keep DEVONthink To Go from knowing your location, set it to Never.

- **Photos:** Turn this on to give DEVONthink To Go access to your photos.

- **Siri & Search:** Use these switches to specify in what ways, if any, Siri and the iOS/iPadOS system-wide search tools can interact with DEVONthink To Go and its data.

- **Notifications:** Configure the ways in which you would like DEVONthink To Go to be able to get your attention.

- **Background App Refresh:** Turn this on to enable DEVONthink To Go to perform certain tasks (such as syncing and indexing) even when the app isn't open. This capability is entirely controlled by iOS/iPadOS, however—it's not under DEVONthink's control.

- **Cellular Data:** For iPhones and iPads with cellular radios, turn this off if you want to prevent DEVONthink To Go from syncing over a cellular connection.

- **Language:** Choose DEVONthink To Go's default language here. Unless you specify otherwise, it uses the language you set for your device in Settings > General > Language & Region > *Device* Language.

Get Information Out of DEVONthink

Ordinarily, you'll interact with the data in your DEVONthink database using DEVONthink itself. However, in some cases you may want to copy or move documents out of DEVONthink to send to other people or use in other apps. DEVONthink lets you copy, share, or export static information from DEVONthink in a dizzying array of formats to suit almost any need. (If you want to give other people on your local network *live* access to your database, see the next chapter, Use DEVONthink's Web Server.)

> **Tip:** If you're setting up a DEVONthink-based web server in order to share your data with others, read the sidebar Choosing a Sharing Strategy, earlier, to make sure you are aware of your sharing options, just in case one of the others is a better match for your needs.

Copy Data

The simplest way to get a document out of DEVONthink is to drag it to your desktop (or any other convenient folder). You can also drag documents into other appropriate places—for example, you can drag a document into a Mail message to add it as an attachment, drag a graphic into Photos to import it, or drag a text file onto the BBEdit Dock icon to open it for editing in BBEdit.

Another option is to select one or more documents and choose Edit > Copy (⌘-C), then switch to the Finder or another app and choose Edit > Paste (⌘-V).

> **Note:** Although some metadata is preserved when you copy it from the app (for example, DEVONthink tags become Finder tags), metadata that's exclusive to DEVONthink (such as star ratings and custom metadata) won't be included, unless you use File > Export > Files and Folders and then import that data into another DEVONthink database.

Share Data

If you want to send one or more documents to another person, or to another app on your Mac, select the document(s), click the Share icon, and choose a destination from the pop-up menu.

This menu is the same as the one that appears in other Mac apps that support Share extensions. (See Use the Share Extension for more about DEVONthink's Share extension.)

Export Data

If neither copying nor the Share feature meets your needs, you can export your data in many different formats. You might do this, for example, to save documents in a different format

(exporting can convert file formats at the same time), or to create a standalone website from a portion of your database.

All the export commands live on the File > Export submenu, and there are lots of them! (However, not every document format can be exported in every other format—for example, you can't export a graphic as a text file.) Here are your options:

- **Document:** Saves the selected item in its original format, with the option to add tags in the process.
- **Files and Folders:** Saves selected items in their original formats, preserving any group hierarchy as folders. It's safest to store exported files and folders in a new folder, rather than intermixing them with existing documents.

> **Note:** The next eight commands combine all selected documents into a single file in the selected format. With Rich Text (RTF and RTFD), Text, and Word formats, you can optionally select the "Include names of documents" checkbox in the Save dialog to include individual document names in the file.

- **as OPML:** Exports the selected groups and documents as an Outline Processor Markup Language (OPML) file, suitable for importing into most outliners.
- **as PDF Document:** Exports the selected documents as PDF.
- **as Rich Text (RTF) Document:** Saves selected documents as a single rich text file, including styles but omitting graphics.
- **as Rich Text (RTFD) Document:** Saves selected documents as a single RTFD file, including styles *and* any graphics.
- **as Text:** Saves selected documents as a single plain text file (that is, without styles); you can optionally specify the encoding using the Text Encoding pop-up menu.
- **as Unix mailbox:** Exports selected email messages (applies only to documents in `.eml` or `.emlx` format) as a Unix `.mbox` file, which many email clients can import.
- **as Word Document:** Saves selected documents as a Word (`.doc`) file, including styles but *not* including any graphics.
- **as Website:** Saves the selected items as a set of HTML file(s) and linked media, in the process converting non-web-friendly file formats to PDF.

  "Website" in this context means a collection of files and folders; by default, DEVONthink doesn't create an index page. If you want such a page (with links to each of the other documents), click Options in the Save dialog and then select Create Index Pages. This export option can be useful if you have a collection of, for example, rich text

documents with embedded graphics and you want to convert it to a format that will display in a webpage (which requires that graphics be stored as separate files).

- **as Template:** Saves the current (single) document as a template in `~/Library/Application Support/DEVONthink 3/Templates.noindex`, adding it to the Data > New from Template submenu (for more information, see Template).

- **Database Archive:** Saves a copy of the entire selected database, compressed as a Zip file; see Back Up and Restore from Backup.

Use DEVONthink's Web Server

The Server version of DEVONthink has a built-in web server that lets you share your database live on a network. This is useful for giving yourself (or other family members) access to your data from other computers in your home, or for running an internal website that provides shared information for all the employees of a small company. It also makes it possible to add new information to your database from a web browser. Although the web server was present in DEVONthink Pro Office, the version in DEVONthink Server has been redesigned with a new look and feel, improved security, and granular per-user and per-database access controls.

I want to emphasize, though, that this is not a full-blown database server, and it's not suitable for running a public website. Compared to standalone servers, DEVONthink lacks many standard logging, performance, and customization features. So it's good at what it does—but just bear in mind that what it does is limited.

Note: By default, unless the Mac on which you're running DEVONthink has its own publicly routable IP address, your database will be visible only inside your internal network. It's possible to work around this by using techniques such as port forwarding, but that's beyond the scope of this book. Consult your router's documentation.

To set up the web server, follow these steps:

1. Go to DEVONthink 3 > Preferences > Server (**Figure 90**).

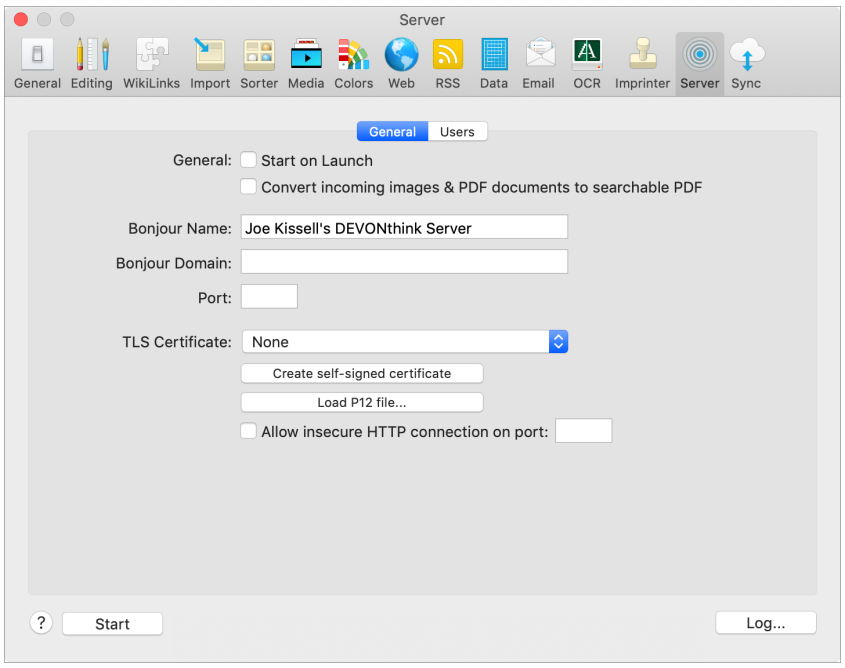


Figure 89: Set up DEVONthink's web server here.

On the General tab, edit any or all (or none) of the following fields to taste:

- **General:** Check Start on Launch if you want to activate the web server automatically when you open DEVONthink. Check “Convert incoming images & PDF documents to searchable PDF” if you want DEVONthink to perform OCR on all images and PDFs uploaded via the web interface.
- **Bonjour Name:** Enter the name your DEVONthink web server will have on the local network.
- **Bonjour Domain:** If your local network contains more than one Bonjour domain (an unusual situation), enter the domain name at which your database will be reachable (to enable proper generation of relative links). Most people can ignore this setting.
- **Port:** Enter the number for the port on which the server should listen (if blank, DEVONthink chooses a random, high port number such as 60149).
- **TLS Certificate:** These controls enable DEVONthink to communicate via an encrypted HTTPS connection. If you already have a TLS certificate for your Mac installed (for example, one obtained from Let’s Encrypt), you can choose it from the pop-up menu. If you don’t have an externally managed certificate, however, click “Create self-signed certificate” to make your own and select it, all in one step. (Self-signed certificates are just as secure as those provided by certificate authorities, but visitors to your site may receive a warning that the connection may not be private because the certificate is not trusted.) If you have a P12 file rather than a TLS certificate, click “Load P12 file,” navigate to the file, and click Choose.
- **Allow insecure HTTP connection on port:** If, despite having HTTPS enabled, you want to enable insecure, HTTP connections, check this box.

2. On the Users tab, set up accounts and permissions for each person who will connect to DEVONthink via the web server. Starting with DEVONthink 3.5, a guest user is included by default (and you can set up that user’s preferences to your liking), or you can add other users, as follows:

    a. Click the plus + button, type a name, and press Return.

    b. In the Password field, enter the password that user will type to log in. (A password is mandatory; if this field is left blank, the user will be unable to log in.)

    c. For each database (including the global Inbox), select the checkbox(es) for the activities that user is permitted to do via the web interface: Read, Download, Add, Write, Organize, and Delete.

Note: You can change users and permissions at any time, but if the server is running, you must stop it to make these changes, and then restart it.

3. Click Start. (You can also choose Tools > Start Server, which is useful when the Preferences window is closed.)

   The web server starts, and DEVONthink displays, at the bottom of the window, the address at which it can be reached—in both Bonjour format and as a numeric IP address (such as `http://iMac.local:60150`, `http://172.16.85.1:6015`).

The web server is now running. To turn it off later, click Stop, choose Tools > Stop Server, or quit the app.

To visit your database, open a web browser (on the same Mac, an iOS/iPadOS device, or another computer on your network), enter the address DEVONthink gave you in step 3, and enter the username and password for one of the users you set up in step 2. You should then see something like **Figure 91**.

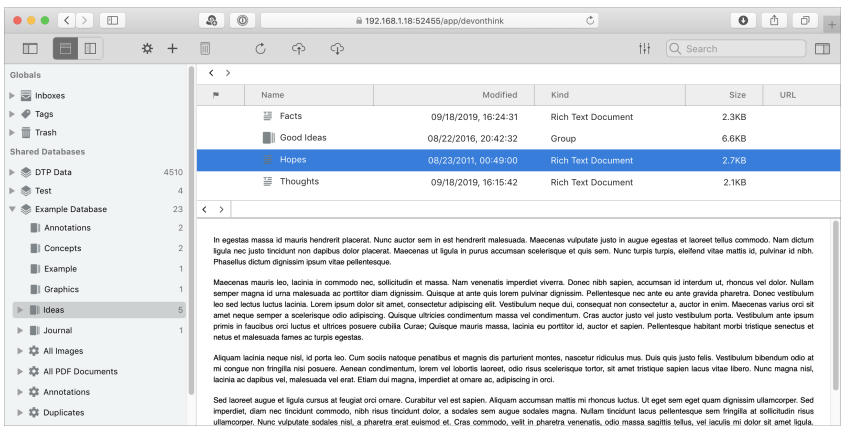


Figure 90: Your database looks something like this in a browser.

Because the controls available on this webpage are so simple and largely self-explanatory, I'll refrain from detailing each one. But I do want to point out just a few key features (which are dependent on the permissions of the currently logged-in web sharing user):

- **Uploading and downloading:** Remote users can add new documents to the database (tagging them in the process) and retrieve entire files in their original formats.
- **Creating and editing:** Remote users can add bookmarks, plain text notes, formatted notes, and Markdown documents to the database (again, including tags) from the browser, and can edit existing documents in those formats. Remote users can also add feeds and groups.
- **Search:** Use the full-featured Search field on the right side of the toolbar to search either the current database or all databases.
- **Organization:** You can move, copy via drag and drop, and rename documents. You can also use the actions ⚙ pop-up menu on the toolbar to apply labels or star ratings, or to mark them as (un)flagged/(un)read/(un)locked.

In addition, the browser interface has buttons to delete and refresh, switch between Standard and Widescreen views, change the language between English and German, hide or

display the sidebar and inspector (which supports editing custom metadata and includes a See Also view), or log out.

If you're wondering about another favorite feature, chances are it's simply not there—sorry! The web server is great for basic access, but it makes no attempt to replicate all of DEVONthink's functionality.

DEVONthink and Mobile Devices

If you connect to a DEVONthink web server with an iPhone, iPod touch, or iPad, you may be pleasantly surprised to see that the page is optimized for the device's small screen. Even so, this method of getting at your database may be problematic if you need access when you're away from your local network, and the user interface is still somewhat cumbersome to work with. A much better solution for iOS devices and iPads is to Use DEVONthink To Go.

Dig Deeper

Although I can't cover every last DEVONthink feature, I want to wrap up this book with a brief discussion of a few key features that are a bit more obscure or advanced than what the average user may need on a daily basis. I hope you'll use this information as a starting point to explore and experiment with the app on your own.

Maintain Your Databases

In certain situations, your DEVONthink databases can become corrupted. For example, if a system process DEVONthink depends on crashes while data is being written, the files may not be stored correctly or completely. Disk errors and other random events having nothing to do specifically with DEVONthink can also cause problems with your databases. If you begin noticing problems—weird error messages; missing documents, groups, or tags; or anything else that's out of whack—you can use any of several techniques to fix them. (And, it doesn't hurt to use these from time to time as a preventive measure, even if you haven't noticed any problems.)

Verify & Repair Database

The File > Verify & Repair Database command checks the selected database for errors, and if it finds any, it fixes those it can. So choosing this command is a quick and easy way to solve many common problems.

During the repair process, if DEVONthink finds any files in its package on disk that don't have corresponding entries in your database, it (re)imports them and puts them in a new group, at the top level of your database, called Orphaned Files. You can then move these newly adopted documents to the group(s) of your choice. DEVONthink also reports any missing files in Window > Log.

Optimize Database

Over time, as you add, delete, and modify items, your database can become less efficient in the way it stores your data, leading to decreasing performance. DEVONthink offers an easy way to reorganize your database's internal structure behind the scenes—it won't look any different afterward, but it may work better. (You needn't do this often, perhaps every few months if the app feels a bit less zippy than usual.)

To optimize a database, select it and choose File > Optimize Database. DEVONthink creates an extra backup of your database behind the scenes and then rebuilds its structure. Normally this takes just seconds, even with a huge database. To optimize *all* open databases

at once, go to DEVONthink's Script > Data submenu and choose Verify & Optimize Databases (⌘-Control-Option-Y).

Back Up and Restore from Backup

You should, of course, back up your DEVONthink databases by including the `~/Databases` folder (or whatever folder you store them in) in your regular backups—for example, those you make using Time Machine, Carbon Copy Cloner, or Backblaze. (For extensive advice on backups, see my book *Take Control of Backing Up Your Mac*.) However, in addition to whatever ways you may back up your database outside DEVONthink, the app backs up its own data internally once a week (assuming you open it at least once a week).

If you're experiencing problems with DEVONthink that the Verify & Repair Database is unable to fix, you can try restoring DEVONthink's internal backup, *which affects only your metadata, not the documents themselves*. To do this, hold down Option and choose File > Restore Backup. Select a backup (DEVONthink stores two, and usually the most recent one is the logical choice), and click Open. DEVONthink reverts to the version of the metadata and index stored in that database. It doesn't hurt, after doing this, to choose Tools > Verify & Repair again, just in case your backup was also damaged. But keep in mind that if you've made further changes to your DEVONthink database since that backup, they may not be reflected in DEVONthink after you restore your backup.

If you want to create an extra, manual backup of your full DEVONthink data (which you can then copy to the media of your choice), choose File > Export Database Archive, select a location, and click Save. DEVONthink stores the backup as a Zip file.

Rebuild Database

If all else fails (namely, you still see error messages or weird behavior even after Verify & Repair and Restore from Backup), your best course of action may be to ditch your index and rebuild it from the raw documents. Doing so generally preserves your group and tag structure, although some metadata may be lost.

To rebuild your database, choose File > Rebuild Database and click OK. DEVONthink exports and then re-imports all your documents.

Link DEVONthink Documents to Other Apps

You can also access particular documents in your database *from another application on your Mac*. Select any item and choose Edit > Copy Item Link (⌘-Control-Option-C). This puts a specially formatted URL on your clipboard. Go to that URL from anywhere else on your Mac and it opens the selected item in DEVONthink.

Tip: In a PDF, you can also link to a particular *page*: if the Content inspector is open with Thumbnails selected, select a thumbnail, hold down Shift, and choose Edit > Copy Page Link (⌘-Control-Option-Shift-C). In a rich text document, you can link to a particular paragraph by selecting text, right-clicking (or Control-clicking), and choosing Copy Paragraph Link from the contextual menu. In a video, you can link to a particular frame by clicking the gear icon in the video's control area and choosing Copy Frame Link from the pop-up menu.

Why would you want to do this? I'll give you a quick example. Calendar has a URL field for each event. If you put the link to a DEVONthink item in one of these fields, you can jump to that item—say, a report related to a meeting, or a research document you need to present at a conference—directly from Calendar. (DEVONthink's included Reminders scripts do just this; see Included Scripts.)

Tip: DEVONthink also works with a terrific third-party app called Hook, which lets you link any document to one or more other documents, anywhere on your Mac. For complete details, see this Hook support page.

Appendix A: Keyboard Shortcuts

Many of DEVONthink's menu commands have corresponding keyboard shortcuts, and you can see those easily enough by looking at the menus. However, some keyboard shortcuts—particularly those involving a combination of keyboard and mouse—aren't apparent from looking at the screen. In addition, DEVONthink adds a number of menu commands to locations outside the DEVONthink app itself, and although you can see those on the relevant menus, you may not think to look for them. So, in this brief appendix, I've compiled a list of the most useful yet non-obvious DEVONthink keyboard (and keyboard-plus-mouse) shortcuts.

Keyboard-and-Mouse Combinations

The following shortcuts within DEVONthink occur with a combination of keyboard and mouse usage:

- **Duplicate to another location:** Option-drag.
- **Replicate to another location:** ⌘-Option-drag.
- **Create compound predicate (Smart Group or Advanced Search):** Option-click the plus ⊕ button to the right of any criterion, which then becomes an ellipsis ⋯ button.
- **Select a rectangular region of text in a PDF:** With the Text tool selected, Option-drag.
- **Display a contextual menu:** Right-click (or Control-click).
- **Resize all columns in Column view:** Option-drag any column divider.
- **Select multiple contiguous documents, groups, tags, etc.:** Shift-click.
- **Select multiple discontiguous documents, groups, tags, etc.:** ⌘-click.
- **Open a link in a new background tab:** ⌘-click.
- **Open a link in a new foreground tab:** ⌘-Shift-click.
- **Create a link from one DEVONthink document to another (rich text) document:** ⌘-Option-drag the first document into the desired spot in the second.

In addition, you may want to use these keyboard shortcuts in the Finder on occasion:

- To display the `~/Library` folder, hold down Option and choose Go > Library.

- To move items into DEVONthink (that is, import and then move the original to the Trash), hold down ⌘ while dragging the items to DEVONthink.
- To index (not import) items when dragging into DEVONthink (including to the Sorter and the system-wide global Inbox), hold down ⌘-Option while dragging the items.

Other Shortcuts

Several other miscellaneous shortcuts exist:

- **Sorter:** The commands Take Note, Copy Selection, and Clip to DEVONthink have no keyboard shortcuts by default, but you can define hotkeys for them in DEVONthink 3 > Preferences > Sorter.
- **Apple Mail:** The shortcut for Message > Add to DEVONthink 3 is ⌘-Control-Option-M. You can also add the entire selected mailbox to DEVONthink with ⌘-Control-Option-Shift-M.
- **Services menu:** DEVONthink optionally adds several commands to the system-wide Services menu, such as Take Plain Note and Add to DEVONthink 3. Some of these may be disabled by default. You can enable them, change existing shortcuts, or add missing shortcuts; see Use the Services Menu.

Learn More

You can learn more about DEVONthink by consulting any of the following resources:

- DEVONthink User Handbooks: The official documentation from DEVONtechnologies (available in PDF, EPUB, and Mobipocket formats) covers other features that didn't fit into this book.
- DEVONtechnologies User Forum: Share your tips and experiences with other DEVONthink users, get problem-solving advice, and learn new ways to accomplish tasks in the User Forum.
- Devonian Times: To keep up with news about DEVONtechnologies, its products, and more, read Devonian Times, a blog by DEVONtechnologies employees (including the company president, Eric Böhnisch-Volkmann).

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Joe Kissell is the author of more than 60 books about technology. In 2017, he also became the publisher of Take Control Books, when alt concepts inc.—the company he runs along with his wife, Morgen Jahnke—acquired the Take Control series from TidBITS Publishing Inc.'s owners, Adam and Tonya Engst.

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