DEVONthink To Go

VERSION 4.2.3 Chandra

DOCUMENTATION

© 2001-2026 DEVONtechnologies

TABLE OF CONTENTS

GETTING STARTED **4**

Use Cases 4
DEVONthink To Go Simplified 5
The Interface 7
Building Your Database 9
AI Explained 12
More Resources 15

INTERACTIONS **16**

Customize the View 16
Select Items 17
Organize Your Documents 18
Get Information About an Item 18
Search 20
Sync Your Data 21
Context Menus 21
Get Help 24

DOCUMENTS **25**

General 25
Document Linking 27
AI and Your Documents 28
Plain and Rich Text 30
Markdown Documents 30
PDF Documents 31
HTML-Based Formats 32
Sheets 33
Images, Audio, and Video 34
Emails and Other Formats 34
RSS and Atom Feeds 34

IN & OUT **36**

Widgets 36
Creating Items 37
Convert Items 38
Clipping Data 38
Scanning Paper Documents 38
Sharing 39
Using the Document Provider 40
Use Drag-and-Drop 41
Using Siri 42
Using News Feeds 42
Use the Finder for Batch Imports 42

SYNC **43**

Sync Explained 43
Sync Setup Basics 45
Everything or Just the Metadata 46
Sync: Bonjour 48
Sync: iCloud 49
Sync: Dropbox 50
Sync: WebDAV 51

SETTINGS **53**

About 53
License & Account 53
Help 54
Tips 54
Log 54
Privacy 54
Notifications 55
Sharing & Spotlight 55
Synchronization 55
Interface & Chat 56
AI 56
Data 58
Annotations 59
Versioning 59
OCR 59
Documents 60
Text 60
PDF 60
Markdown 61
Feeds 62
Web 62
WikiLinks 63
Backup 63

FAQ & TROUBLESHOOTING **65**

Security 65
Spotlight 65
Sync 66
Sync: Troubleshooting 66
Contacting Us 67

APPENDIX **69**

Glossary 69
Iconology 71
Tagging 72
Search Operators 73
Item Links and Paths 76
Shortcuts Actions 77
URL Commands 78
Utility URL Commands 81
Supported UTIs 82

READ ME **84**

What's New 84
About Us 100
Legal 100
Credits 100

OTHER PRODUCTS **101**

Overview 101
DEVONthink 101
DEVONthink To Go 101
DEVONagent 102
DEVONsphere 102
Needful Things 102

GETTING STARTED

IN THIS CHAPTER

Use Cases	4
DEVONthink To Go Simplified	5
The Interface	7
Building Your Database	9
AI Explained	12
More Resources	15

Welcome to DEVONthink To Go — a powerful document and information management application that "runs in the palm of your hand". Leveraging the flexibility of your mobile device for immediate access to your documents, it also supports creating and capturing documents. So you can build your own database, wherever you are for whatever your need. Capable enough to run as a standalone application, it also acts as a companion to our desktop application DEVONthink. With the performance and expanded range of features in DEVONthink, you have an incredible combination to create a truly portable library of the documents and information important to you.

This manual will help get you familiarized with the software's concepts, interface, and use. From the basic elements of your databases, to the variety of document and capture types, to every day usage, we hope it's a useful reference for you. And for those who need a bit deeper topics, the Appendix covers some of those as well.

Remember: you build your databases, not someone else's. While it can be useful to glean details from how others do things, how you organize, whether you use tags or custom metadata, what file format you prefer to write in, etc., follow your instincts and find the way that makes sense to you. If you can organize and work with your databases effectively, you're on the right path. We hope this manual provides information and insight to help light the way for you.

Warmest Regards, The DEVONtechnologies Team

Now let's get into it...

USE CASES

DEVONthink To Go is about information: capturing, organizing, locating, and analyzing it. No matter the topic, whether general or specific, it is built to contain your information in a consolidated, easily accessible location. With this application, you can carry all this information and have it at your fingertips.

If you're wondering if you could use our applications, we have people in all walks of life using them. Here are a few examples: doctors, lawyers, business owners, members of the clergy, educators, students, painters, writers, musicians, woodworkers, travelers, sports enthusiasts, moms and dads, and many, many more. With that list, you can imagine many ways you could create and organize databases. A teacher could have

a database per class, with one group per student. Writers sometimes make databases for a book and another for resources they find. Many people keep a database about their equipment and appliances, including manuals, receipts, warranties, etc. We even have people researching and gathering information on all phases of life: birth, raising children, staying healthy, through elder care and end of life documents. No matter what the topic or project, build the database(s) YOU need, organized to suit how you think and work.

DEVONTHINK TO GO SIMPLIFIED

DEVONthink To Go is a powerful but conceptually simple application, with only a few component parts. Beyond the interface, the building blocks of your "library" are just: databases, groups, and documents.

DATABASES

The database is the basic unit of DEVONthink To Go. This is akin to a book in a library, with material relevant to its topic contained inside it. As you create your own "library", you'll likely add new databases, no matter how broad or narrow the topic.

You will always have at least one database: the *Global Inbox*, a special database and a core feature of DEVONthink To Go. It is most often used for transient or unfiled data. For example, you may clip some web content but don't want to properly file it right away. The global inbox provides a place to hold the data until you find time to curate it. When you clip or share an item to DEVONthink To Go, the global inbox is available for importing such items. Also, when you create a new item from the databases screen, it is placed by default into the global inbox.

Top-Level Groups: In each database, there are four core elements: an Inbox, a root, a Tags group, and a Trash.

- **Inbox:** Similar to its real-world counterpart, the *Inbox* is a place to store unfiled items or items you need to deal with before filing. When you clip or share items to DEVONthink To Go you can import them directly into the Inbox of the chosen database.
- **Root:** When you first navigate into a database, you are in its root. It is essentially the secondary filing location outside a database's Inbox. Any items you add to your database, whether documents or groups, are either located somewhere in the Inbox or the root of a database.
- **Tags:** The *Tags* group contains tag groups for all tags applied to files in a database. When you add a tag to a file, a reference to the file is stored in the specific tag group. You can view tags on an item via its Info popup. To see all items that have that tag assigned, go into the Tags group of the database and select the specific tag.
- **Trash:** Every database has its own *Trash*, containing all trashed items from the database. If you find an item in the trash and want to return it to its place in the database, select the *Put Back* option from the Actions menu, the return arrow icon in the left-swipe options, or the context menu. To remove the trashed files, go into the database's trash and press the *Empty Trash* button in the bottom toolbar.

GROUPS

Like folders you're already familiar with applications like Files.app or the Finder on a Mac, groups are the core organizational component in DEVONthink To Go. These can be singular groups with a mixture of items or a deeply nested structure. How to approach it is up to what makes sense to you. But there are also a few specialized groups as well.

Group Tags: Group tags are a specialized way of tagging, set per-database. Go into the Info popup for a database and disable *Exclude Groups from Tagging*, the groups in the database become group tags, indicated by an icon of three stacked tags. This applies the name of a group as a tag to the items it contains. For example, if you have a group named "Taxes" all the groups and documents inside it will have a tag of "Taxes".

These are dynamically assigned tags, so moving items between groups also changes the tags. This can be used to assign certain states to items. If you have a group per-department, putting a document will assign a tag for the department. Moving the document to another department's group will assign a tag for that department instead.

You may not want every group to function as a tag. Open the Info popup for a specific group and enable *Exclude from Tagging*. This removes the tag for that group but only for that group, not its subgroups.

Smart Groups: Covered in more detail in the In & Out chapter, smart groups are essentially saved searches, similar to the Finder's smart folders on a Mac. These display items that match criteria you assign. For example, you may often search for PDF documents added to a database in a given year. A smart group lets you view those matching documents quickly without having to repeatedly search for them.

DOCUMENTS

As you may have anticipated, the third core component of DEVONthink To Go are: your documents. Indeed, information is only transient unless it's captured in some form, whether in rich text or as tabular data in a sheet, etc. your databases are only hollow shells until they contain documents. DEVONthink To Go can hold many different file types, even creating and editing certain ones, all discussed in the Documents chapter. For more information on getting documents into your databases, check out the In & Out chapter.

Duplicates and Replicants: While not a file type, one concept you should understand is item duplication and replication. Both are ways of "duplicating" an item, but with very different outcomes.

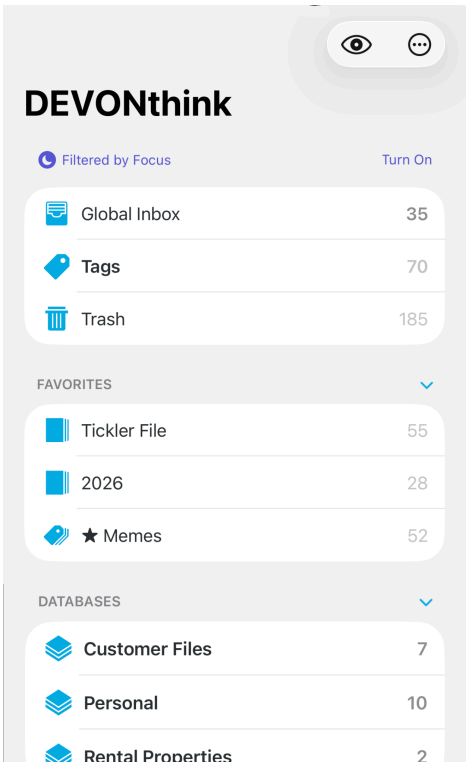
- **Duplication:** When you duplicate an item, you are creating a copy of it. This copy is separate and can be modified as needed.
- **Replication:** Replication is similar to duplication with one major difference: it never creates a new item. Instead, it creates what is called an "instance" of the item. This looks and acts exactly like the original but consumes no more space than the item. So if you make a change to one instance, it affects every instance. Also, you can delete any and all but one instance without affecting the others. Once all

replicants are deleted, the last item is no longer a replicant.

In the Info popup for an item, in the *Instances* popup, you can see the duplicates or replicants for an item listed. Each shows the group containing those items. Also, if you enable *Color duplicates & replicants* in the Interface settings, the name of duplicated items are shown in blue, replicants are in red, and items both duplicated and replicated are shown in violet type.

> Note: Replicants can only be made in the same database. This is why you'll never see other databases listed when replicating via the Organize > Replicate menu.

THE INTERFACE



The interface of DEVONthink To Go follows the lead of many mobile applications, e.g., Mail. The window is constructed of three simple panes, each with their core functions: access, organization, and interacting with documents. Here is an overview of the parts of the interface and the common buttons you'll see. We've also noted any differences between the iPad and the iPhone.

SIDEBAR

The leftmost pane is the sidebar. Also called the databases screen or databases list, this pane is focused on access: to your databases, smart groups, and settings.

Controls: At the top of the sidebar you'll see a few buttons. Use the *Unify* button to toggle showing the *Inboxes* and *Tags* for all open databases. The second button leads to other controls.

- **Add:** opens the item creation menu to create several types of items.
- **Sync:** forces a manual synchronization.
- **Activity:** opens the *Activity* popover, displaying certain long-running activities, e.g., indexing or sync progress.
- The opens the settings to handle a wide range of controls, including synchronization, the interface, etc.

Lastly, if you're on an iPad, there is a *Sidebar* button to open and close the sidebar.

The sidebar is also composed of individual sections.

Globals: The top section is the globals section showing inboxes or tags or just the Global Inbox, depending on the Unify button or what you choose in the Interface settings. The *Trash* for all databases is always shown.

Favorites: The next section shows your *Favorites*, giving you quick access to commonly used items, no matter their location in the databases.

Databases: The next section is where you access all your open databases. Tap one to navigate into it. If you want to reorder them, long-press and drag one into its new position and release.

Smart Groups: Next are the global smart groups — predefined groups that show any matching items in all open databases. We've included a few commonly used ones to get you started, including ones to show all your PDF documents or recently modified files.

Reading List: A special smart group is the *Reading List*. It provides a place to temporarily store files you'd like to read at another time. The Reading List only shows documents, not groups, as logically only documents can be read. It also is able to sync with your other devices running DEVONthink or DEVONthink To Go, provided you are syncing the Global Inbox between them.

You can add items to the favorites and the *Reading List* via the *Actions* or context menu. Removing them is done via the same menus or left-swiping an item and choosing remove.

The numbers inside the rows indicate how many items are in the database, excluding the Trash or Tags group, or smart group. For the global inbox all items minus the contents of the *Tags* and *Trash* groups are counted. For smart groups other than *Tags* and *Trash* all items are counted. An additional dot signifies that the database contains unsynced changes.

Search Field: Lastly, if you're on an iPhone, the search field is shown at the bottom of the sidebar.

ITEM LIST

The aptly named "item list" is where you'll see your groups and documents listed. Navigate into a database or global smart group and you are in the item list. This is where you will spend a lot of time navigating, organizing, and accessing with your documents.

At the top of the item list are a few buttons.

- The Edit button is used for selecting items.
- On the iPad, use the *Search* button for database searching.
- If you navigate into groups, use the *Back* button to navigate back through the parent groups.
- If the sidebar is hidden, tap the *Sidebar* button to temporarily show it.

At the bottom of the item list, the leftmost button changes, depending on your selection. If nothing is selected, the *Add* button is where you can create new items. If one or more items are selected, you'll see the *Actions* button with a variety of other commands. In addition, you'll see:

- A toolbar with three user-definable buttons. Adjust these buttons to suit

your needs, e.g., chatting, quick access to Favorites, etc.
- On the iPhone, next you'll find the the 🔍 *Search* button.
- At the right, the ☰ *View options* button for sorting and filtering the item list.

Item Markers: The number next to databases and groups in the sidebar or item list shows how many items are contained in them. For the Global Inbox, this accounts for all the documents. For other databases, the number is the count of items in their Inboxes. Note, the total doesn't include the Trash or Tags groups though those can be viewed individually. If name and number is in bold, the number is the number of unread items. Once all items are read, the number shows the total items. Also, if you see a dot next to a database's name, that means there are unsynced changes in it.

For smart groups, the number indicates how many items are matched by the criteria.

VIEW/EDIT PANE

The main area where you view documents or a group's content in Grid view. As this pane is mainly used for document viewing and editing, it is discussed in the Documents > View/Edit section.

MENUS AND WINDOWS

On the iPad, DEVONthink To Go has a menu bar at the top of the screen, just like its desktop counterpart. There are many commands accessible via the menus, as well as many keyboard commands. Here is an overview of the menus:

- **DEVONthink:** Access DEVONthink To Go's Help.
- **File:** Print your documents.
- **Edit:** Contains a range of commands, including: undo/redo, copying and pasting links, in-document search
- **Data:** Holds a variety of controls, like image creation, shortcuts to database searches, changing document states, e.g., locking, as well as grouping, duplicating, or trashing items.
- **Format:** Control the fonts and formatting while you edit your documents.
- **Tools:** Get information on an item, open the Chat assistant, or capture selected text as a new document. There are also some specific controls for editing Markdown documents and sheets.
- **View:** Show or hide the sidebar or item list, reload or close a document.
- **Go:** Navigate through your groups or quickly jump to specific global smart groups.
- **Window:** Control and open new windows, including tiling or switching to open windows.
- **Help:** Search and use the menu commands.

DEVONthink To Go also supports iPadOS' window system. Now you can resize and reposition windows, tiling them side-by-side, etc.

BUILDING YOUR DATABASE

Now that you know the elements of databases and the interface, let's briefly discuss building your database.

Go to the sidebar, tap the ⊙ *Actions* button, then ⊞ *Add*. Choose *Database*. Logically, you'll need to provide a useful name for the

database. (Note we recommend limiting punctuation to hyphens, underscores, dots, and spaces and not using emoji.) If you now tap the *Create* button, your database is created, ready to use. But let's go over the two other options here.

SPECIALIZED DATABASES

Protect with Password: Due to the differences in filesystems between Mac and mobile, the encrypted databases in DEVONthink aren't supported. This option lets you set a username and password for the database. However, this is only used in synchronization, just as it is in the database properties in DEVONthink. With these set, a database can only be imported from a sync location if they enter the credentials for the database.

In a single-person situation, this may not be needed. However, in multi-person environments, you can limit who can import and sync a database by providing the credentials to only specific people, departments, etc.

But the credentials can also be used for another very specific purpose...

Revision-proof: The second available option is *Revision-proof*, a specialized type of database used for archiving or when needing to survive an audit. Such databases can receive documents, i.e., you can't create documents in it. However, once the documents are in the database, they are locked and read-only, prohibiting any editing. You can change properties like a color label, rating, or tag but you cannot change metadata like creation or modification dates. You can move documents around the database or even delete them. It's also possible to rename a document. However, there is an internal index, inaccessible to you, tracking changes. For example, if you rename a document its original name is stored. So not only are the documents protected from being changed, changes to the database are being tracked. Note you can create groups for organizing and smart groups for repetitious searches in a revision-proof database.

While the internal index is locked away, there is a special command on the databases screen. Long-press a revision-proof database and choose *Export Audit Report*. Using Apple's File Provider, choose a location, e.g., in iCloud Drive, and a report is saved in `.csv` format.

To make a revision-proof database, use the Add button mentioned above. Enter a name. Enable *Revision-proof* and *Protect with Password* will be enabled automatically. Enter the desired username and password then press *Create*. The database will appear as a custom icon with a shield in the corner and you can start importing your documents and organizing them, as needed.

Please bear in mind, these databases are intended for very specific circumstances. Also, the credentials will not "lock your database from access" in DEVONthink To Go.

Lastly, if you are syncing with DEVONthink, you will be required to enter the credentials when importing the database on your Mac. But you will also need to define the maximum size the database can grow as well as the encryption key before you import the local

copy. Consider the size very carefully as you are setting a limit for the database on both Mac and mobile.

> Note: You must remember or store these credentials in a safe location. If you are mobile-only, there is no way to look up or change the credentials.

BUILDING CONSIDERATIONS

While building your databases, mobile tends to build much more slowly as Apple has limited the ability to move and share large numbers of documents en masse. This often leads to having a more finely curated database. But if you are using our desktop application, with its ability to ingest large amounts of data, you may have or be working toward building very large databases.

Since you are obviously working on mobile as well, how you're building databases on the desktop should be done with consideration toward mobile. This may mean making smaller, more focused databases (something we generally recommend anyways). Or you may have certain databases you sync and use in DEVONthink To Go. Regarding mobile, here are some things to think about:

- Consider the amount of space on your device. While there are some ways to add external storage to a mobile device, they can't be used to house your DEVONthink To Go data.
- If you're running our desktop and mobile apps, think about what you really need to carry with you. Especially if your mobile device is older and has a smaller capacity, you want to carefully consider how you build your database for mobile use. Think of the Mac as your house and mobile as your auto. You don't want to try to put everything in your home into your car.
- While mobile devices are more powerful than ever, they are still limited compared to Macs. Remember, you can't close databases in DEVONthink To Go to relieve device resources like you can on a Mac.
- If you're syncing your databases, keep in mind: the larger the database, the longer the sync times when importing.

While the decision is ultimately yours, we do recommend smaller, more focused databases — on both Mac and mobile. This can be more easily accomplished if you focus on topical databases. Most often, a monolithic, singular database is less performant and less effective in searches. Having your financial documents in your database with recipes, health information, your cryptid research, blog posts you're writing, travel itineraries, etc. makes e.g., searching for documents added last July more cumbersome to look through. Even a simple binary split, like a work and a personal database, is a better option. But if you split even further, you can improve the speed of access and searching for specific items.

Try starting in reverse. Should you make a database about the American avocet? It's certainly possible. But maybe it should include other avocets. Or should you add all shorebirds, birds native to your country, or just all birds. How granular you want the database to be is up to you. And combining groups and tags to add more context to your documents can help separate or relate things within the database. In any case, when you

want to search for documents about the Loggerhead Shrike, you won't be finding ones about Loggerhead Sea Turtles.

ORGANIZATION

When it comes to how you organize your databases, there are two essential mindsets: collaboration or individual use. When working collaboratively, how things are organized needs to be understood and agreed upon by the group. This is especially true if you're syncing databases, as changes made on one device affect the others. But if you're working alone, follow your instincts. Would you naturally file things in deeply nested groups, like `Finances > 2024 > Receipts > Auto > Jim's Mazda > Oil Changes`? Or use more shallow groupings and avail yourself of the search feature? While it's good to be open to others' ideas, don't feel you have to force yourself to follow a system that causes more friction than success. A successful database is not just one you can add documents to; it's one you can effectively find and use what you already have in it.

CASE STUDY: BILL'S DATABASE FARM

Bill DeVille, formerly DEVONtechnologies' Evangelist, worked in a number of scientific areas. Bill's main database covered environmental science and technology topics, with related interests in science and technology exchanges with developing nations. The database even contained some projects dealing with graduate education in environmental sciences and engineering. He created an interdisciplinary database with broad topical relationships, including chemistry, toxicology, statistics, risk assessment, engineering, economics, legal, regulatory, and policy issues. While his main database was large, it served as the core for his professional life.

Bill also wisely created separate databases covering other topics of interest, including one dedicated to the Apple Newton. Using focused databases like this allowed him to control the growth of his databases and make for more effective searches in any of them.

Remember that creating databases isn't an immutable commitment. They can be modified and refined as you work with them. Ideas may spark new approaches which can easily be tried and adopted or discarded. The best organization method for your databases is the one that makes sense to and is effective for YOU.

AI EXPLAINED

Once the stuff of science fiction, artificial intelligence (AI) is now a commonplace thing to hear about. With the advent of publicly accessible large language models (LLMs), we certainly took notice. After a long time of discussion and testing and refinement, our desktop application debuted with access to some of these AI services. And now, as those interactions mature, DEVONthink To Go also opens up to them as well. This section is intended as an introduction to what AI is as well as making clear what to expect so you can approach it in an informed way.

AI BASICS

If you're new to AI, perhaps having heard people talking on forums, the news, etc., but you don't know much about it, here's a very simplified intro.

How does chat work?: At a very simplified level, your prompts are broken into words, then into pieces called tokens. The AI looks into its database looking for matches and what token likely comes next. It puts the match in place then continues searching and matching tokens to create the words and sentences in its reply.

Parts of a query: There are three parts to making an AI query. Two are mandatory; the third, optional but useful.

- **AI model:** The chat engine handling your inquiries. By default, the one chosen in the *AI* settings.
- **Prompt:** This is your question or command, e.g., "For the selected document, record the highest rates of change in a table." The more specific the prompts, the more specific the responses.
- **Role:** An optional but sometimes useful component, a role can define a persona to help direct the responses. This could be for yourself like, "I am in an undergraduate calculus class..." or for the AI engine such as "You are presenting an introductory workshop on woodworking..." The chat responses will be tailored to be appropriate for the role and setting.

We have also included some relevant terms in the Glossary > AI section of the Appendix.

Choosing an LLM: Remember that using AI is entirely optional. However, since you're reading this you are at least curious about it. So the first step is choosing an LLM. If you look at the *AI > Chat* settings, you will see where you set a default *Chat* provider. These are the currently supported options, with no specific advocacy for any:

- **ChatGPT:** OpenAI's breakthrough LLM, ChatGPT is a fast and powerful general purpose model but can also handle more technical inquiries.
- **Claude:** Created by Anthropic, Claude is a privacy-focused LLM that provides excellent conversational responses to a variety of requests.
- **Gemini:** Google's Gemini LLM is a fast, no-nonsense responder, often just producing results with little excess commentary.
- **Mistral:** Mistral is from a French AI company traditionally focused on open-sourcing many of its models. Their models are broadly useful, from document analysis or code snippets to more general inquiries.
- **Perplexity:** Beginning as a search-based AI engine similar to Google, Perplexity offers reasoning and self-branching searches with its Deep Research to gather and assess before responding.
- **OpenRouter:** With literally thousands of AI models available, we can't hope to support them all. An OpenRouter account provides access to multiple AI models, even very large ones you couldn't run locally. Note: If you have an API key for a commercial model, e.g., Google Gemini, also accessible

via OpenRouter, you should choose that as your *Chat* model, not OpenRouter.

- **Local LLMs:** LMStudio, and Ollama are two applications that allow running an LLM downloaded to a Mac. When running as a server, they can be accessed in DEVONthink To Go.

THOUGHTS ON CHOOSING AND USING AI

As we've mentioned, adding AI capabilities was no trivial thing to investigate, discuss, and implement. And while we have come to terms with the areas of concern we could control, on a personal (or professional) level, there are still topics that you must consider and decide on for yourself.

Privacy: We are firm believers in data-privacy and we do whatever we can to keep things in your control. However, when dealing with a commercial AI service, your questions and potentially documents go to servers controlled by that service. Do a little research on how your AI conversations are stored and used.

DEVONthink To Go doesn't allow AI to have uncontrolled access to your data and databases and takes several steps to safeguard your privacy. Here are a few things we do:

DEVONthink To Go never sends your original document to an AI engine, taking these steps to keep things private:

- Image files are scaled, recompressed, and sent without the original metadata.
- For PDF documents without a text layer, a certain number of page are sent, dependent on the AI model you're using.
- Text-based documents only send raw text with no metadata.
- In case of audio and video files, any available transcription or still images from video would be sent when chatting about them. Also, when using a remote transcription model like OpenAI's Whisper, the audio track is extracted and recompressed before it's sent for recognition.
- To improve results and enhance privacy, links in content, including email addresses, are anonymized. This can also reduce token usage.
- When using commercial AI models supporting tool calls, data is only sent on demand, never in advance.

Lastly, DEVONthink To Go doesn't come with AI access enabled and running. Again, it's always optional so it's up to you to set up and choose the options you want to use.

Expenses: While some AI providers may offer a free tier, the usage is limited and you may have to agree to share your chats for training their models. For the best experience you will be purchasing tokens, again "bits of words", either in bulk or running up a tab as they're used. While they're typically relatively inexpensive per-token, heavier use of AI will deplete your reserves or increase your bill faster. As a courtesy, we've included property icons in the *AI settings* denoting if a particular chat model is known to be expensive.

Another thing to be aware of is the difference between using a chat agent, e.g., talking to ChatGPT, and using their API. An API is how third-party applications programmatically

access services and data provided by a company. To use commercial AI services, you will need to create an API key for the service and enter it in the Chat > API Key settings. Check with your AI provider how to generate a key and any involved costs.

Here are some general recommendations that may help curb costs:

- For everyday tasks and automation, use the cheapest model, e.g., Claude Haiku. Choose more expensive models if the lower-tiered model fails to produce a useful answer or you need the features of a higher model, like reasoning.
- The *Usage* dropdown changes the amount of tokens used in a chat. *Auto* strikes a good balance for general use. You can always temporarily change this for certain situations.

Quality of results: These chat engines are doing incredible computational gymnastics to produce responses they also don't verify the answers unless specifically instructed to do so. Even commercial models can "hallucinate", i.e., returning inaccurate or irrelevant responses. Especially on questions of consequence, you should be checking the responses.

Also understand AI responses are not static. Responses are created every time you prompt it so using the same prompt multiple times will not return the same result unless your prompt is very specific.

The limitations of local AI: Not everyone wants to send their data to online servers outside their control. DEVONthink To Go can connect to local AI applications running on a desktop computer. But be aware there are serious limitations when compared to accessing a commercial service. While price and privacy are right, the performance and quality of results are usually drastically less. However, if you're inclined and curious — and your desktop hardware can support it — using local AI is certainly something you can explore.

WHAT CAN'T BE DONE WITH AI

While there are many things that can be done, there are still limits imposed by privacy concerns or technical considerations. AI has limited access to the current location or selected document, not all your databases. Also, it is not going to "process and connect" years of your documents and information in your database. You will still be able to chat about documents, but in a more limited way.

We believe it's important to approach AI in DEVONthink To Go with a good understanding of the possibilities and limitations (and yes, some things may change as technologies evolve). That all being said, we believe access to external AI in DEVONthink To Go brings new and exciting possibilities.

MORE RESOURCES

In addition to the documentation you're now reading, you can find information and tips on our company blog.

And if you feel like talking to other people using any of our applications, you'll find discussion, camaraderie, and almost two decades worth of information on our forums.

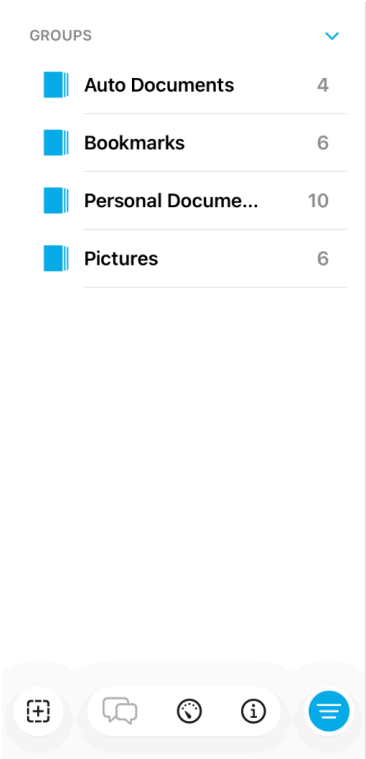
INTERACTIONS

IN THIS CHAPTER

Customize the View	16
Select Items	17
Organize Your Documents	18
Get Information About an Item	18
Search	20
Sync Your Data	21
Context Menus	21
Get Help	24

In this chapter we discuss the common things you'll do in DEVONthink To Go. These are things like how you can sort and select and search or get information about items. While much of the interface should be familiar, here we cover DEVONthink To Go-specific interactions.

CUSTOMIZE THE VIEW



When working in the item list, you may want to sort it by different criteria, e.g., by kind or date added. Or maybe you want to show only unread items momentarily. Tap the ≡ *View Options* toolbar icon to change the way DEVONthink To Go shows this group's content. Smart groups as well as the search have view options, too.

- **Sorting:** Sort the items by name, type, size, label, rating, URL, or date. Choose the same option again to change the sort order from ascending to descending and back. You can also show a group unsorted and rearrange its items manually by drag-and-drop (note that due to restrictions in how the database core handles sorting,

replicated items share a single manual sorting order). Search results can also be sorted by relevance.

- **Summary:** Choose if you want to see additional details like information about the item, an abstract, comments, tags, or the item's URL. Show or hide the row of property icons for each item. The summary can be between one and five lines long; choose *No Summary* to see only an item's icon and name.
- **Filter:** Apply filters to show only items matching certain criteria: only downloaded, flagged, labeled, pending, rated, tagged, or unread items, or items with a URL. You can combine multiple filters as needed. Groups and feeds that are filtered by unread items will also appear dimmed in item lists when they don't contain unread items.
- **View:** Show or hide special groups like the Inbox, Tags, or Trash groups. Check *Always Open in Icon View* to open the current group in icon view the next time you tap it in list view. Show or hide thumbnails for images, PDFs, and other document types.

View options are set per group. Child groups inherit their parent's view options individually unless you set them explicitly. The list of search results has its own set of view options too.

ICON VIEW

For the more visually inclined, DEVONthink To Go has a mode for showing the contents of a group as larger icons in the view/edit pane, called Icon view.

On the database screen or in the item list, long-press a database or group and choose *Open as Icons* to show its content in an icon view instead of simply navigating into it. A grid of thumbnails is shown in the view/edit pane with a preview if one is present. Tap a document to view it or tap a group to navigate into its subgroups, also displayed in icon view. Note items in icon view can be organized via drag-and-drop and there's also an edit more that lets you select and work on multiple items at once.

Hold the *Option* key and tap a database, smart group, or group in the item list to open it in icon view. To always open an item in icon view, check *Always Open in Icon View* in the item's view options.

The icon view also has its own set of view options including three different sizes of icon.

SELECT ITEMS

Selecting single items is as simple as tapping the desired item in the item list. If this is a group, it will now display the contents of the group in the item list. If it is a document, the document will be displayed in the view/edit pane. Selecting multiple items can be done in two ways:

Edit: Press *Edit* in the top toolbar of the item list. Tap each item you'd like to add to the selection. If you want to remove an item from the selection, just tap it again. Tap the button to select all items in the list and tap to deselect them all again.

Two-finger swipe: Lightly tap an item with two fingers to select it. Drag your fingers without lifting them to select a contiguous

range of items. Scroll with one finger then two-finger swipe to add non-contiguous groups of items. You tap or two-finger drag selected items to remove them from the selection. This is the standard iOS way for selecting multiple items in lists.

> Note: Edit mode and two-finger swipe are not available in search results.

With items selected, you can open the Info popup, use the Actions menu, or drag them. The context menu will be available but only act on a single item; this is standard iOS behavior.

Keyboard shortcuts: If you use a hardware keyboard, hold the *Option* key and tap a database, smart group, or group in an item list to open it in icon view. On the iPad, hold the *Shift* and *Option* keys and tap an item to open it in a new window. There are also many more keyboard shortcuts that are listed in the iPad's menu bar.

ORGANIZE YOUR DOCUMENTS

DEVONthink To Go has a specialized submenu for moving, duplicating, grouping, etc.

To organize a single item, long-press it in the item list to open the context menu, then choose from the *Organize* submenu.

For multiple items, select them in the item list, either individually or in groups, then tap the ⊙ *Actions* toolbar icon, then *Organize*, and choose the action you want to perform.

The actions in this menu are:

- **Move:** Move the item to a new group and/or database.
- **Replicate:** Create a replicant of the item in another group.
- **Duplicate:** Create a duplicate of the item.
- **Group:** Grouping creates a new group and places all selected items into it.
- **Ungroup:** Ungroups a selected group. Ungrouping an empty group or tag moves the item to the trash.
- **Save Version:** Manually creates a new version. New versions are normally created automatically as you edit documents.

GET INFORMATION ABOUT AN ITEM

You can reach the *Info* popover in many ways:

- By long-pressing a group or document and tapping the ⓘ button in the context menu. You can also open the *Info* popover for a database by using the context menu on a database in the database list.
- Selecting items and using the ⊙ *Actions* menu.
- If you added the custom *Info* button to the item lists or documents toolbars, by navigating into a group or opening a document and using the custom button.

> Note: For multiple items not all options are available in the *Info* popover.

The *Info* popover is divided into four tabs:

- **General:** General information about the item.
- **Annotations:** Add comments to the item or larger annotations that are stored in a separate annotations document.

- **Data:** Access all custom metadata fields that you have defined.
- **Versions:** List all stored versions of this document, go back to a previous version, or purge versions. See also p. 59ff

GENERAL

The *General* tab lets you view and change many details of an item.

Documents and groups: Tap the name to edit it. Add a URL to the item, add and remove tag (tap 🏷 to expand the tags field), and change metadata such as the 🏷 label, ⚑ flag, or ● unread mark. Lock 🔒 the item to prevent it from being accidentally deleted. Tap any star to set a rating from one to five stars or move your finger over the stars. Touch any of the stars and drag left to remove the rating.

Exclude documents from being used by the AI chat. Exclude groups or documents from turning up in a search, groups from being used as tags, or groups or documents from becoming WikiLinks targets. Databases can also be excluded from versioning.

View all instances of this document, replicants and duplicates. Add WikiLinks aliases to reference the item under multiple names. For RSS or Atom feeds, choose the article format.

Finally, the *General Info* sections lists all the other details about the document such as its kind, size, dates, and the geolocation associated with the item. You can change the creation and modification dates. Here you also find the item's original name, if any, including a menu to copy or restore it. Open the item's geolocation in Apple or Google Maps, update it to the current location, or edit it freely.

Groups: You can give groups and tags individual colors. Tap the color widget to choose a color from the color picker. Colors are synchronized between devices.

If you are not downloading files for a whole sync location, you can make sure that selected groups and the items they contain will be downloaded regardless of the sync location's setting. In the *Download* section, choose *Always* to keep the group content's files downloaded at any time or *On demand* to download them on demand. Tap the selected option again to unselect it; the group will use the setting from its enclosing group. This setting is either explicitly set for a group or, when not set, the enclosing group's setting is used. In this case none of the two options is selected.

Databases: Databases have some options exclusive to them. Set a username and password, if desired, which is used by DEVONthink To Go when initially downloading this database from a sync store and DEVONthink for Mac every time you open the database. You can also exclude a whole database from being used by the AI chat, set a database to ignore case when tagging, and let items inside groups inherit their enclosing group's tags. A database's *General Info* section includes info about versions and a list of what kinds of documents are stored in the database.

ANNOTATIONS

The *Annotations* tab lets you change the item's comment and add a longer Markdown-based annotation. Annotations are stored as separate, linked document but can be also edited here.

Use the annotation field's ⊙ menu to add or remove an annotation, open it in the view/edit pane, reveal it, or insert back links or paste texts as a quote.

DATA

DEVONthink To Go supports custom metadata fields that you can define and use freely. Switch to the *Data* tab to change the custom metadata of the item. To define which fields are visible here, visit Settings > Data.

VERSIONS

If versioning is enabled for the database, the *Versions* tab lists all stored versions of the document. Use a version's ⊙ menu to preview the version, restore the document to that version's state, or remove versions.

SEARCH

Tap the 🔍 button over the item list on the iPad or at the bottom on the iPhone.

Enter your search term and choose where you want to search, called the search scope: *All*, *Database*, *Group*, or *Here*.

While you type DEVONthink To Go returns first results based on document titles. Press ↩ *Return* to start the actual full-text search.

While a search is in course a progress bar appears below the search field. The results are sorted according to their view options which offer also sorting by relevance but no filters. If you need to filter search results use the appropriate search operators.

Search Results: In the search results, tap *Edit* to switch to edit mode and select multiple items. Alternatively, tap the ⊙ button to select all items in the list and tap ⊗ to deselect them all again. With items selected, use the ⊙ *Actions* to, e.g., mark the selected items as read or flagged, add to the Reading List, etc.

SEARCH ACTIONS

In the search field, tap the ⊙ *Actions* button for more commands. A few basic commands are:

- **Help:** Opens the search operators page in the help.
- **Recent Searches:** Display and choose some of your previous searches.
- **Ignore Diacritics:** Ignore diacritical marks, e.g., umlauts, in the search terms.

SEARCH ASSISTANT

If you have set up access to AI, you can use the Search assistant to create your search query with natural language. For example, you can ask, "Show me all Markdown documents made after Nov. 1 of this year." then press the ↩ Return key. The syntax will be shown under the prompt field. Press the reload button to generate a variation. Press the *Use* button to start the search.

ADVANCED SEARCH

One of the available options is the advanced search. This opens a criteria editor where you can visually construct a search. Here you select properties and desired values to find matching items. Each criterion is defined by the attribute, an operator, and a value. As an example, you may look for `Kind is Image`. As you make choices, the syntax will be constructed for you to see. Tap the Action button at the right to add more criteria. Use *Add Term* to add a new criterion. Tap *Add Compound* to add nested criteria. Imagine you want to look for both PDF documents and images made today. You would have a criterion of `Date Created is today` and a nested criteria of `Kind is PDF` and `Kind is Image`. Make sure to choose *Any* or *All*, as needed. When you're ready, tap the *Use* button. If you need to edit the criteria, tap the Action button and go back into the advanced search editor.

SAVE

Another option you'll see in the actions is *Save*. Use this to save the current search terms as a smart group. If you have chosen *Databases* as the search scope, this will create a global smart group. All other search scopes create a local smart group in your database. You can also read about another method of creating smart groups.

SYNC YOUR DATA

If you have enabled your databases to sync, you can pull down from the top of the sidebar or item list to initiate a manual sync. You can also tap the *Sync* button in the ⊙ *Actions* menu of the sidebar. When the sync is ongoing the sync progress is shown if you tap the ⊙ Activity toolbar icon.

If there are local, unsynced changes in any database the icon shows a dot next to the database's name. If the sync log contains sync-related messages, the ⊙ sync icon shows a triangle. Tap the icon to open the log. If the warnings have been addressed, press the *Clear* button to clear the log.

To learn how to set up sync, visit the Sync chapter.

> Note: Inside groups that contain news feeds, pulling down the item list will also refresh the feeds.

CONTEXT MENUS

Context menus are popup utility menus allowing quick interactions navigating your databases or getting information and organizing.

> Note: Some commands might be represented by a button, e.g. *Info*, *Sync*, *Copy Item Link*, or *Share*.

NAVIGATION

When you navigate into a database, on the left side of the top toolbar you will see a back arrow. Pressing this will move you one step back, into the parent group, database, or out to the database screen. However, if you long press the back arrow, a menu will appear displaying the chain of groups you're in, from the parents down to the database screen

marked as *DEVONthink*. Keep your finger pressed and you can select any location to quickly jump back to it.

GET INFO, SHARE...

Another context menu allows you to do things like get information, organize, convert items. While some of the commands are also available in the *Actions* menu, the context menus are also available in smart groups and search results where the *Actions* menu is not. The menu can be displayed by long-pressing individually selected items in the item list; the context menu never acts on multiple selected items which is currently a limitation of iOS.

In the item list, you will be presented with these options:

Info: Opens the *Info* popover for the selected item.

Share: Share the item via the Share menu.

Copy:

- **Copy Item Link:** Copies the unique URL, i.e., the item link, for the selected item to the clipboard.
- **Copy Item Link as Markdown:** Copies the item link for the selected item in Markdown syntax to the clipboard.
- **Copy ... Link:** Copies, e.g., an item link to a specific page, selected annotation, text passage, etc. These options are only available from the ⊙ Actions button in the document toolbar.
- **Copy URL:** Copies the URL of the file to the clipboard if one is detected in the item's metadata.
- **Copy Name:** Copies the selected item's name to the clipboard.
- **Copy File:** Copies the file to the clipboard.
- **Copy with Source Link:** If you have text selected in a document, this copies the text including a link back to the document (source link).

Reveal: Reveals the selected item in its current location. This can be used in smart groups and search results.

Enter Zen Mode: Opens the selected document in a distraction-free mode hiding all user interface controls. Tap the background of the document again to show the controls again, e.g., for leaving Zen mode.

Open as Icons: Opens a group as icons in the document area instead of navigating into it in the items list

Open in New Window: On devices supporting multiple windows, this opens the selected item in a new DEVONthink To Go window.

Open URL Externally: If the item has a URL in its metadata, this opens it in the default web browser or appropriate app.

Mark: Toggle some states like flagged, unread, and locked. Change the item's label and rating.

Add to:

- **Add to/Remove from Favorites:** Adds or removes the selected item from the favorites.
- **Add to Reading List:** Adds the item to the *Reading List*.
- **Add to Templates:** Adds the item to the templates for creating new documents.

Put Back: Returns a moved item to its previous location. You cannot undo a series of moves with this command.

Convert: Opens a submenu of conversion options appropriate to the selected document. In the case of images and PDFs, the *To Searchable PDF* option will perform OCR on the document.

Search in Document: This option is only available from within a document and opens the in-document search.

Merge: Merges the selected document into a new document. Only available from the ⊙ *Actions* toolbar icon and when multiple items of the same type are selected. You can also merge tags or groups.

Merge Groups: Merges the contents of selected groups into a single group. Only available from the ⊙ *Actions* toolbar icon and when multiple items of the same type are selected.

Create/Remove Thumbnail: Creates thumbnail for the selected item or removes it.

Download/Purge: Downloads the files of selected documents or all items contained in a group to your device. Documents are downloaded individually, downloading groups downloads all documents contained in the group and all its subgroups. Purge item contents to free space on your device. You can re-download the items again on demand. Not available if the containing group is set to download contents automatically. See also p. 46ff

Via Chat: The options in this menu are only available when you have provided an AI API key in Settings > AI.

- **Edit Image:** For images, opens the *Edit Image* popover that allows you to edit the image with AI.
- **Summarize:** Open the *Summarize* popover that creates AI summaries of the selected document.
- **Rename:** Renames the item to a name proposed by the AI.
- **Set Label:** Set the label to one proposed by the AI.
- **Set Rating:** Rates the item via AI.
- **Add Tags:** Adds tags suggested by the AI.

Move to Trash: Moves the selected item to the database's *Trash*.

Move All to Trash: Moves all instances the selected item to the database's *Trash*.

DATABASES

The context menu for databases offers a different set of options compared to other items.

Info: Opens the *Info* popover for the selected database

Copy Item Link: Copies to the clipboard the unique URL, i.e., the item link, for the selected database.

Sync: Synchronizes the database.

Open in New Window: Opens a new window for this database.

Add to Favorites: Adds the database to the favorites.

Verify & Repair: Checks the selected database for common problems and tries to repair them.

Remove Unused Tags: Moves unused tags to the trash.

Export to Files: Exports the selected database as a self-contained ZIP archive to DEVONthink To Go's Documents folder. It can be accessed in the Files app by navigating to *On My Device > DEVONthink*. Please note that only downloaded documents are part of the export and that metadata is not exported separately. Therefore, the export can be used to create an app-independent backup or for sharing complete databases with someone using a non-Apple device, but cannot replace the synchronization or backing up the device to, e.g., iCloud.

Delete: Deletes the database after you intentionally okay its removal.

GET HELP

Above the sidebar, then open the ⋯ *Actions* menu.

- Choose *About* to view information about how much space your databases use on your device and when DEVONthink To Go was last launched.
- Choose *Help* to view this documentation.
- Choose *Tips* to read constantly updated tips for using DEVONthink To Go. A dot on the menu command's icon shows that there are new tips available.
- Choose *Contact Us* to send an email to our support team.

DOCUMENTS

IN THIS CHAPTER

General	25
Document Linking	27
AI and Your Documents	28
Plain and Rich Text	30
Markdown Documents	30
PDF Documents	31
HTML-Based Formats	32
Sheets	33
Images, Audio, and Video	34
Emails and Other Formats	34
RSS and Atom Feeds	34

All the information in your databases are stored in documents of some kind. These may be a simple text file with a random thought, a long PDF on a topic of interest, etc. You can view many documents types from within DEVONthink To Go and some can be edited directly inside the app. Here are the controls you'll use.

GENERAL

Working with your documents is done in a large, ever-present pane with a variety of controls and options.

VIEW/EDIT PANE

When you select a document in the item list, it displays in the large view/edit pane on the right. This is where you'll do all your reading, annotating, and editing. You'll also see a series of controls at the top of the pane.

Fullscreen: If you want to maximize the view of your document, tap the fullscreen button to hide the item list and sidebar. Tap it again to show the item list.

Title Menu Commands: When viewing any document, its title appears at the top of the screen. Tap it to show a menu with document-related commands for renaming the document, printing it, revealing it in the item list, or saving a version.

Common Functions: Depending on the document type, one or more of the following toolbar options are available:

- Reload the document.
- Add as new document.
- Search text within the document.
- Show a menu similar to the context menu for the document.
- Show a menu with settings specific to the kind of the document.

Editing: For documents that are editable, tap the *Edit* button in the toolbar (iPad) or navigation bar (iPhone) to edit. Tap *Done* to end editing. Depending on the document format, DEVONthink To Go shows a toolbar with useful editing commands relative to the file format.

Settings: The settings offered by the button change the global settings for this document kind without requiring you to open the settings popover. For example, when using dark mode you can keep the light mode

appearance when viewing documents. Some document-type-specific options might also only be available here.

Zen Mode: You can switch documents into *Zen Mode* for a distraction-free experience. To exit Zen mode, tap the navigation bar area of the document again. You can enter Zen mode from the ⊙ *Action* menu or simply by tapping the document background when this option is enabled in the *Settings*. A custom Zen mode button is also available for the documents toolbar.

> Note: If the document's file is not yet downloaded from the sync store, you are presented with a thumbnail, if available, and the option to download the document. If you switched on the option to download pending documents automatically and the sync location is available, DEVONthink To Go tries to download the document.

CONTEXT MENU

If you long-press on certain types of documents in the view/edit pane, a context menu will appear. The commands available are dependent on the type of document but also what is selected. However, some commands you may see include:

- **Select All:** Select all the text while in editing mode.
- **Set Name As:** Change the name of the document to the selected text.
- **Lookup:** Searches for the selected words in Apple's dictionary.

If you tap the forward arrow on the right, more options appear, including commands to copy item links or search for the selected text online or translate it.

VERSIONING

While we work on our documents, mistakes or second thoughts often happen. You delete a section of text and now wish you hadn't. Or you think a previous wording may be better. DEVONthink To Go supports document versioning so you can review and restore a previous version of a document.

Versions are enabled on a per-database basis in the Info popover. As you make edits to a document in DEVONthink To Go then save it, a version is preserved. If you need to view or restore a previous state, you'll find them in *Versions* view. Tap the Action button next to the desired version and choose *Preview* to view it. If it's what you want, open the menu and tap *Restore*. You can also remove this or all document versions in this menu.

Be aware versions do take up space so the number you keep and their maximum size is important. Open the Versioning to set these limits as well as how long versions should be kept. If you are wondering how many versions you have in your database, their number and total space are listed in the *Versions* section of the Database Properties.

> Note: Versioning only applies to edits made in DEVONthink To Go, not those made in external applications. And if it has been less than two minutes between saves, a new version will not be produced.

DOCUMENT LINKING

Documents in DEVONthink To Go are independent items but often have contextual relationships with other documents in your databases. Efficiently creating and using these links is key in many peoples' use cases. DEVONthink To Go supports three types of links.

LINK TYPES

Relative and Absolute Links: Exclusively used in Markdown documents, these are links similar to what is seen in the source code of web pages; e.g., `/stylesheets/styles.css`.

WikiLinks: WikiLinks are a way to connect documents in your databases by text-based links. When enabled, DEVONthink To Go attempts to detect other items by matching the words you've typed in plain and rich text, Markdown documents, or formatted notes. Matched text creates a hyperlink to the detected item. For existing documents, these links are automatically detected depending on the method chosen in the *WikiLinks* settings. If a matching item isn't found, a new document will be created with the text as the filename and containing text as defined in the template in the settings.

Item Links: Many applications today have a URL scheme — a special URL that provides some extra functionality for that application. In DEVONthink To Go, every item in your databases has a unique URL called an item link, pointing only to that item. When used with in-application documents or in external applications that support URL schemes, the item link will open the linked document in our software. In some cases, the link may even contain certain parameters to do things like open a video to a specific time.

CREATING LINKS

Making links to other documents should be easy to do. However, working within the constraints of certain file formats sometimes requires different methods to create them. Listed below are the most common ways to add links between documents.

- **Copy Item Link:** Select an item in the item list or some text in a document and choose *Copy Item Link* from the context menu or Edit menu on an iPad. This captures the item's unique link to the clipboard so you can paste it into another document or even another application. Some other types of links can be captured, e.g., page links. Item linking methods specific to certain file formats are covered in their respective sections of this chapter.
- **Source Links:** A very powerful method involves selected text in a document. Select some text and choose *Copy with Source link* from the context menu or *Edit* on an iPad. This captures the text and a link to it. This can be pasted into other documents, potentially including documents in other applications. The complementary command is similarly powerful: *Paste with Source Link*. If text on the clipboard has a reference to its origin, use this command to paste into a document in DEVONthink To Go. You should get the selected text and a reference to the original document, if available.

AI AND YOUR DOCUMENTS

An LLM — Large Language Model — is designed and trained to work with text. As the core focus of DEVONthink To Go is documents, AI is an ideal match and brings powerful complementary features, including: document analysis, chatting, and document creation.

ANALYSIS

Summarization: One of the key uses of AI is to extract the essence of a document via summarization. With a document selected, choose *Via Chat > Summarize* from the context, Data, or Actions menus. Using the options you set in the AI > Summarization settings, AI will examine the document, returning the results in one of five formats: block text, bullet points, key points, a table, or a custom format. The custom format is defined with a special prompt in the settings. You can also choose a different format in the summarization popover, noting AI will re-examine the document when you do.

Tap the Action menu in the summarization popover for some additional commands.

- **Copy:** Copy the current summary to the clipboard.
- **Save:** Saves the summary in your chosen format to the location of the original document. Supports: plain and rich text, formatted note, HTML, Markdown, sheet, and JSON. Additionally, you can save the summary directly to an annotation file with a backlink to the original.
- **Reload:** Forces the AI to examine the document again and provide a new summary.

Metadata: Another way you can use AI is to modify a few types of metadata on your documents. Select a document, and choose one of the commands in the *Via Chat* submenu:

- **Rename:** Changes the name to one derived from the document's content.
- **Label/Rating:** Applies a color label or rating to the document.
- **Tags:** Examines the document and adds tags automatically. If you want to maintain more control over your database's tags, enable *Only use existing tags* in the AI > Tagging settings.

Analyzing Images: One of the surprising things some AI models can do is analyze images. The model needs to have vision support, marked with 👁 in the AI > Model settings. With these models you can ask it to describe the image. One interesting thing you can do is to ask it to translate the text in an image, e.g., a photo of a sign or perhaps a historical document.

CHATTING

Document analysis works on a set of predefined parameters but you often have your own questions to ask. This is done via the Chat assistant, accessible in two popovers where you can ask about the current document, items in the current location, or just general topics.

In-Document Chat Assistant: While viewing a document, open the in-document Chat popover via the Action menu at the top of the screen. The popover appears with your default AI model pre-selected and the prompt field ready for your commands. When

using this assistant, the AI is aware of the current document and responds relative to it. However, there's still no harm in adding a phrase like, "In this document…" to your initial prompt.

Click the Action menu in the popover for extra commands. These include the *Copy* and *Save* commands mentioned above but also has some chat-specific commands:

- **Clear:** Completely erases the current chat.
- **Resend:** Resends the last prompt. This is often used after changing the AI model.
- **Model selector:** Change the AI model to any ones available to you, even mid-chat.
- **Search:** Change where the AI searches for information.
- **Usage:** Adjust the usage settings for the AI model.
- **Documents:** Manage how the AI in this chat accesses documents.
- **Speak Chat Responses:** If you have a need to hear the responses from AI, enable this option.

Global Chat Assistant: Regarding your documents, the global chat assistant lets you talk about the selected document too. But it also allows you to discuss documents in the current or selected group. To get started you need to enable the *Database* option in the AI > Search settings. This gives AI restricted access to the current location, i.e., the group you're in. To AI, this location is "your database".

In the toolbar at the bottom of the item list, open the global chat popover and type in your prompt. Alternatively, you can also select multiple documents and ask the AI about them collectively.

The Action menu in the popover includes the same options as the in-document chat assistant.

CREATION

Documents: Not only can you save the chat responses and summaries, but it's often possible to generate documents. Include instructions in your prompt to save the document in a specific format, even for a specific audience. Currently, the formats are limited to plain text, Markdown, and HTML. On a side note, some AI models have a bit more artistic flair than others. If you have access to more than one AI provider, you can try the same prompt to see if one suits your taste more than others.

Images: If you have access to a generative image model in the AI > Images settings, you can ask chat to create images as illustrations or just for fun. Bear in mind, image generation is usually charged per-image. As it's easy to get lost in asking for variations, just remember the meter is running. The more specific your description, the fewer changes you'll usually need.

If you long-press the image in the assistant, a menu appears with options to share the images, save it to Photos, copy the entire image, or even have Apple's built-in AI identify the subject and copy it. And if you have agile fingers you can long-press and lift the image with one finger, tapping the close button with another finger, and drop it into your database.

PLAIN AND RICH TEXT

You can view and edit plain text and Markdown documents.

Plain Text: The most basic format, with only text and no formatting or links, this is still one of the most broadly used file types in the world. DEVONthink To Go supports these as text files.

RTF and RTFD: Rich text documents use the proprietary RTF format with good but not 100% compatibility to, e.g., DEVONthink for Mac. You can also use the RTFD format supporting attachments of images, Apple Pencil drawings, embedded PDFs, as well as audio and video. On compatible devices you can also use scan-to-text to directly insert text by using the device's camera. Additionally, these rich text files support WikiLinks.

You can find all commands for changing formatting or inserting elements in the toolbar that appears in editing mode. Tap the *Edit* button to enter editing mode and tap the circled cross in the toolbar to leave it.

ITEM LINKING

When you copy an item link from plain or rich text, a paragraph link is created, linking directly to the selected text.

STATISTICS

To see a pararaph, word, and character count when working on text documents, choose *Show Statistics* from the document's view options. The statistics are shown as a movable widget.

MARKDOWN DOCUMENTS

Markdown Documents: Markdown documents are plain text documents. Using simple-to-use formatting rules Markdown documents can be both easily read as they are or graphically rendered like a web page. DEVONthink To Go shows Markdown documents properly rendered when not in edit mode. DEVONthink To Go supports MultiMarkdown 6, highlighting in Obsidian, iAWriter, and Roam formats, checkboxes, and more.

You can reference images and link to items from Markdown documents using either item links, downward-relative, or absolute paths (starting with a forward slash). See the appendix for more information about item links and local paths. Markdown and text documents also support WikiLinks.

Markdown metadata: One of the features of MultiMarkdown is metadata headers. These allow you to add non-displaying information about the document, like authors, dates, and even linked stylesheets. To use the feature, format the first line of the document with a colon, e.g., `Author: DEVONtechnologies`. This must be the first line of the document. Other metadata fields you wish to add must follow immediately after this first line.

> Note: However, if you would like the first line of your document to contain a colon, perhaps adding notes like `Developer: A. Edwards` and `Re: OCR`, just add a single blank line at the top of the document and the subsequent lines will be treated as normal paragraphs.

Additional Markdown CSS: To style the rendered Markdown output to your liking, visit the Markdown settings and enter CSS style definitions for, e.g., `<H1>` or `<P>` HTML tags. Your favorite web page about Markdown has more about how Markdown syntax is converted to HTML for rendering.

Additional JavaScript: You can also inject JavaScript code into the rendered Markdown output, e.g., to modify the created HTML beyond what can be done with CSS. The *Markdown* settings also allow you to add popular JavaScript-based extensions such as *MathJAX* or *Mermaid*.

ITEM LINKING

When you copy an item link from text selected in the Markdown source, a paragraph link is created, linking directly to the selected text. Due to limitations in web views, rendered Markdown does not add a source link to copied text. Use the *Copy with Source Link* command instead.

PDF DOCUMENTS

You can view PDFs, search them, and add and edit annotations.

Navigating a PDF is done by scrolling up and to down or left and right, depending on the *Scroll direction* option in the settings. Scrolling will stop at each page unless the *Continuous scrolling* setting is enabled. Pinch to zoom in and out. When the *Continuous option* option is enabled, the current magnification will be preserved as you scroll. Otherwise, each page will return to a fit-to-width state when visited.

VIEW AND EDIT

There are some special viewing options available for PDFs, viewing page thumbnails, editing the page, order, etc.

Page Editing: Shown as this mode allows you to modify the PDF's pages, including moving, rotating, deleting, exporting, or adding (blank) pages. Tap to select pages or tap and drag to select a range of pages. Reorder pages or drag them to the item list to create a new PDF of the selected pages. Exporting exports selected pages to any destination reachable via the Files app. When finished, press the check mark at the top.

Search: If the PDF is searchable, tap the magnifying glass icon to search inside the PDF document. The results will be displayed in a menu with the search hits highlighted. Tap a result to quickly jump to the page and found text.

Outline: Tap to show the PDF's table of contents, if one is available. Tap a section to jump to it quickly.

Thumbnails: Tap to display a grid of page thumbnails for a more visual navigation of the document. Tap a page to jump to it.

Thumbnail Bar: Tap the currently displayed page to show a bar of thumbnails across the bottom of the page. Tap to jump to a page or tap and drag to scroll through the document quickly. Use the left and right arrows to jump back and forth in the list of visited pages; long-press any of the two arrows to show a menu listing the visited pages. Tap the page again to hide the bar.

ANNOTATING

You may want to add annotations to PDFs while you read them. DEVONthink To Go provide many annotation tools for many needs.

When viewing a PDF, touch the *Edit* link in the toolbar to switch to edit mode. A toolbar will appear at the top of the page or at the last place it was displayed. Place the bar left, right, or over the toolbar by dragging it with the ≡ move bars. Hide the annotation bar by ending edit mode or tapping the ⊗ close icon.

You can also modify already existing annotations without switching to edit mode. The changes will be automatically saved. Use the annotation tools to add, edit, or delete annotations:

- Highlight text, underline, squiggle, strikethrough.
- Add notes.
- Add text or callouts.
- Add a signature.
- Draw with a pencil or use magic ink that automatically turns into geometric shapes.
- Mark something with a semitransparent felt pen.
- Erase something you've drawn.
- Add geometric shapes like lines, arrows, rectangles, etc.
- Add images.
- Save annotations for reuse by copying them first and pasting them into this popover.
- Select multiple annotations with a rectangular lasso.
- Choose whether you want to use the Apple Pencil for annotating or not.

Use ⮌ and ⮎ to undo or redo your changes.

ITEM LINKING

PDF documents support a few specialized item links created via commands in the context or Action menu.

- **Copy Page Link:** Creates a link to the current page.
- **Copy Selection Link:** Creates a link to the selected text.
- **Copy Annotation Link:** After tapping an annotation on the page, this creates a link directly to the annotation.

HTML-BASED FORMATS

DEVONthink To Go supports formatted notes, bookmarks, and HTML documents, though the latter is not editable.

Depending on your Web settings, DEVONthink To Go opens bookmarks in an internal viewer, in an encapsulated Safari view, or in your default browser. Opening bookmarks internally uses the app's own navigation and tools, the Safari view is safer but less intergrated.

Internally: Tap links in the web pages to follow them just as you would in any browser. Tap the < caret to navigate back. Long-tap page elements to show additional options, e.g., copying the item's URL or sharing the item. You can even open the tapped link in Safari or add it to Safari's Reading List. A

star ★ indicates the current web page is one you've navigated to, not the document in your database.

Formatted notes: Based on HTML, formatted notes are 100% compatible to DEVONthink for Mac and can also be rendered using any web browser on any platform. Formatted notes are fully self-contained with their images embedded instead of linking to external resources.

You can find all commands for changing formatting or inserting elements in the toolbar that appears in editing mode. Tap the *Edit* button to enter editing mode and tap the circled cross in the toolbar to leave it.

> Note: Due to memory constraints in iOS, the maximum file size of a formatted note is 64 MB. Bear this in mind when adding unscaled images to a note.

ITEM LINKING

Selected text in web-based formats only support the *Copy with Source Link* command.

SHEETS

Sheets are a tabular format, similar to what you see in Excel or Numbers. Since this is just a table, it lacks advanced functions like formulae, but they are still very useful for creating tables of data. BibTeX files are also shown as sheets.

When you create a new sheet, you will need to specify the column headers you'll be using. Then provide a name and your sheet will be created.

Tap the *Edit* link in the toolbar to display the editing tools and enable editing the cells in the sheet. The toolbar can be dragged to the left or right of the screen or left at the top of the page. Double-tap a cell to add or modify its content. If you are using a keyboard, you can can press ↩ *Return* to edit the cell. You can press *Tab* to move to the next cell and *Shift-Tab* to cycle backward through the cells.

When you enter edit mode, there are four default tools available: *Toolbox*, *Row Editor*, *Column Editor*, and the *Column Header Editor*.

Toolbox: This option provides tools for cutting, copying, and pasting contents in the sheet's cells.

Row Editor: This option allows you to: add rows above or below the current row, duplicate the current row, select the entire row, or delete the current row.

Column Editor: Similar to the row editor, this option also allows adding, selecting, duplicating, and deleting columns. Note if you add columns, they will appear as new columns with no header. You can select the empty header and press Return to add a new header. Duplicated columns can be similarly renamed.

Column Header Editor: Tap this to open a popup displaying the current column headers. Add, rename, remove, or reorder the column headers, as desired.

Tap ⊗ to finish editing the sheet.

ITEM LINKING

Sheets have one special kind of item link: *Copy Row Link* which links to a specific row in a sheet.

IMAGES, AUDIO, AND VIDEO

Images can be viewed as they are in other iOS applications. Pinch to zoom in and out. Press the *Edit* link to rotate the image or apply a predefined image filter.

You can play movies and listen to audio files. DEVONthink To Go offers the standard media player controls, and audio will continue to play when you switch to another app.

ITEM LINKING

Images have no specialized item links, however audio and video files have the *Copy Playmark* command. This links directly to the precise time in the playback.

EMAILS AND OTHER FORMATS

DEVONthink To Go allows you to add a variety of document types to your database. This extends the possibilities when building your databases. Two of note are:

- **Emails:** Emails can be imported into your database. They are indexed so you can also search for them e.g., with the `author` or `content`. If the email has attachments, you will see an Attachments button, appearing as a paperclip. Click on it to show or save the attachments. Bear in mind, Apple has not provided good sharing options from mobile Mail. Email imports, especially en masse, are still best done on the Mac and synced to DEVONthink To Go.
- **EPUB:** You can read `EPUB` files in DEVONthink To Go. For documents with chapters, click the outline button in the top toolbar to jump between them. Be aware it is not possible to highlight these files.

Quick Look: Some documents you add will not be editable directly in the application but may still be viewable. In these cases, DEVONthink To Go uses iOS' Quick Look to display otherwise unknown document types, when possible.

Unknown Types: If DEVONthink To Go encounters a file type it doesn't recognize, it will be listed in a *Documents* section when the item list is set to *Kind*. Each file will be listed with its file extension, e.g., *.scap Document* under the file's name.

RSS AND ATOM FEEDS

RSS and Atom feeds are not documents but special groups that automatically update themselves by downloading new articles from a feed URL. When DEVONthink To Go checks for updates, it fetches the feed and adds any new articles as individual items inside the feed group. Each article is stored in the format you define in the Feeds settings.

To add a feed to your database, paste or type the feed URL into the URL field when creating a new item and choose *Feed* as the type. DEVONthink To Go will immediately fetch the feed and populate it with its current articles.

Updating Feeds: You can refresh a feed at any time by selecting it and choosing *Update Feed* from the context menu.

Alternatively, pull down the item list in a group that contains feeds; DEVONthink To Go first updates all feeds in that group, then syncs. Also, DEVONthink To Go checks feeds automatically in the background at the interval set in Settings > Feeds. Note that iOS has the final say on how often background refreshes actually occur.

Article Format: New articles are stored in the format chosen in the Article format setting. The available formats are automatic (HTML or bookmark), RTF, formatted note, Markdown, web archive, and PDF. When *Use clutter-free layout* is enabled, DEVONthink To Go tries to strip ads and other surrounding content, keeping only the main article text.

Managing Articles: Old articles can be removed automatically according to the rules in the Remove Articles settings. Locked articles and articles in locked feeds are never removed automatically. You can lock an article via its context menu to keep it regardless of the removal rules.

IN & OUT

IN THIS CHAPTER

Widgets	36
Creating Items	37
Convert Items	38
Clipping Data	38
Scanning Paper Documents	38
Sharing	39
Using the Document Provider	40
Use Drag-and-Drop	41
Using Siri	42
Using News Feeds	42
Use the Finder for Batch Imports	42

DEVONthink To Go is not an island. Put widgets on your home screen. Open documents in your database from other apps or save data directly to DEVONthink To Go using its Files app integration. Clip data from other applications using the Clip to DEVONthink share extension. Finally, the *Share* command in the ⊙ menu or the custom Share button ⍐ lets you send documents to other apps, print them to any AirPrint-enabled printer.

WIDGETS

Get the number of items in any of your inboxes or unread articles in your RSS feeds at a glance. Access your most used favorites and top reading list items.

To add a widget, long-press on the home screen and tap the + button. Scroll down to find DEVONthink To Go in the list of apps, tap it, then choose the desired widget and size. Tap *Add Widget* to add it to your home screen.

The following widgets are available:

- **Unread Articles:** Shows the number of unread items in your RSS feeds.
- **Recent Feeds:** Shows the top items in your RSS feeds.
- **Inbox Items:** Shows the number of items in your global inbox and the inbox of any of your databases. You can choose which inbox to show.
- **Favorites:** Shows the top items in your *Favorites*.
- **On the Reading List:** Shows the number of items in your *Reading List*.
- **Reading List:** Shows the top items from your *Reading List*.
- **Recently Viewed:** Shows the four most recently viewed documents.

In addition to the home screen widgets, DEVONthink To Go also provides two control widgets that you can add to the Control Center or your lock screen.

- **New Note:** Opens DEVONthink To Go and lets you directly create a new note.
- **New Scan:** Opens DEVONthink To Go directly into the scan interface.

CREATING ITEMS

DEVONthink To Go allows you to create documents or import files via consolidated popup menu. With it you can quickly begin and save that new idea as a Markdown file, capture a voice note, or grab a video of the sunset, all directly into your database. You can also create some other items, like groups and tags.

Tap the ⊞ *Add* toolbar icon to create a new item. Choose the desired option. For some file types, DEVONthink To Go opens a popover where you can supply additional details. Here are the supported document formats:

- **With Clipboard:** This menu option creates a new document based on the clipboard contents.
- **Text:** Tap this and select the desired format to start. If *Text > Assistant* is checked in this menu, creating new text document opens a popover. Add your content and title, including any metadata like tags, and save the document. If the assistant is unchecked, the document is directly created and opened for editing.
- **Bookmark:** Enter or paste a URL and a bookmark is created, properly titled when possible.
- **Sheet:** Create a new sheet for tabular data by defining the columns and their type.
- **Media:** Tap this to open a submenu with several options. Capture a *Voice Note*, a *Video Note*, import an existing photo, or use the device's camera to take a new one. You can also create new images using generative AI.

See the Documents chapter for more information about available document types.

Also note some specialized options you may see:

- **Smart groups, groups, and tags:** Quickly create any one of these items when you're in a database.
- **Database:** Create a new database via the *Add* submenu of the ⊞ menu of the sidebar.
- **From Template:** You can save documents as templates and use them for creating new documents. Manage stored templates with *From Template > Manage*.

If you create an item, e.g., a group, on the database screen, it will be created in the Global Inbox. When used in a database, the items will be created in the active database.

SMART GROUPS

One of the specialized items are smart groups, i.e., saved queries. They can exist inside a database, like regular groups, to find and present items from that database. But they can also exist on the database list to show matching items from all databases, called global smart groups.

To create one from scratch, navigate into a database then tap the ⊞ *Add* toolbar icon then choose *Smart Group*. Enter a name and the criteria editor appears. Tap the *Search in* field to choose the database or group to search. Activate *Exclude subgroups* or *Ignore diacritics*, if they fit your needs. Now you need to add the criteria to match.

- **All or Any:** Choose whether all or any of the criteria needs to be matched.
- **Attribute:** Choose the property of an item you want to match, e.g., the name, content, date created, etc.
- **Operator:** Choose the operator for the attribute, e.g., `is`. The available operators change with the chosen attribute, e.g., choosing `Date Created` has operators like `on or before`.
- **Matched value:** Enter or choose the specific value you want to match.

If you need to add more criteria, tap the ⊙ Action button and choose *Add Term* to add another. if you want to add subcriteria, choose *Add Compound* and define the subcriteria you need. When you're done, press *Save* and the smart group is ready for use. If you need to make edits, long-press it and choose *Edit* or select the smart group and choose the command via the Action button.

As an aside, you can also create smart groups by saving a search or from the ⊙ *Action* menu of the database list.

CONVERT ITEMS

Not every document is created from scratch. Sometimes you need a document in a different format. DEVONthink To Go has some options for converting documents between editable formats. The available options depend on the format you're trying to convert. For example, you can convert a searchable PDF to plain text to inspect the text layer. Convert documents via the context or ⊙ *Actions* menus. And you can convert multiple selected items if all of them offer the same set of conversions.

CLIPPING DATA

In any application that supports the iOS share sheet, tap the ⎙ *Share* tool and choose *Clip to DEVONthink*. Most commonly used in mobile browsers, the extension uses whatever data the host app provides and fills in the title and content fields, if possible. Choose the location where you want to file it, including specific groups. In bespoke applications like Photos.app, the file type will be detected automatically. In your browser, select your desired document format, e.g., Markdown. Optionally add other metadata such as tags, ratings, etc. When you're ready, tap the *Done* button and the file will be added to your database.

SCANNING PAPER DOCUMENTS

To scan paper documents, tap the ⊞ toolbar button and choose *Scan*. This opens the iOS default scan interface. The camera algorithms will attempt to detect the page boundaries. Tap *Auto* on the iPad or the *Shutter* button on the iPhone, if you want the camera to take the photo automatically, otherwise you can manually take it. When manually taken, you can adjust the page boundary and either keep it or retake it. The images stack up until you press the checkmark button to save them as a PDF document.

Searchable PDFs: Of special note is DEVONthink To Go's built-in optical character recognition (OCR). Use it to convert images or PDF documents with no text layer to

searchable PDFs. OCR always produces a new document and the original can be kept or deleted.

To make a searchable PDF document, you have two options:

- **Convert:** Select the PDF document in the item list and choose *Convert > To Searchable PDF* from the ⊙ *Actions* or context menus.
- **Global OCR:** Go into DEVONthink To Go's Settings > OCR > Text recognition and enable *Make scans searchable.*. This will perform OCR on every document you scan.

Third-party Scanning: Of course you can also use any other scan app for iOS that can save finished scans to the Files app. As DEVONthink To Go integrates with Files you can directly save scans to your databases. If your scan app didn't run OCR on the scan to make it searchable you can use DEVONthink To Go's own text recognition after import.

Settings: You will find the controls for OCR in Settings > OCR. There you can set the *Quality*, whether to retain existing annotations on a PDF, whether to keep the original file or move it to the database's trash, or set any secondary languages to use.

> Note: The built-in OCR is based on the Tesseract 5 engine and the Apple Vision Framework.

SHARING

In iOS, exchanging data is often done through the *Share* menu. For example, you can share a picture from the Photos application to DEVONthink To Go through this menu.

To share a document, long-press the document in the item list and choose *Share* from the context menu. Alternatively, open the document and choose *Share* from the ⊙ *Actions* menu, or tap the Share button in the document's toolbar.

AirDrop: The top part of the sheet lets you send data to other individuals or devices via AirDrop. e.g. for bookmarks it sends the URL.

Open In and Sharing Data: The row of icons lets you send data to the share extensions of other apps. Tap to share or long-press to show a context menu with one or two options: *Share with app* or *Open in app*. The share option copies data or the file to the receiving application or shares a URL pointing to the document (item link), depending on the settings. Any changes to the file in the external application have no effect on the file in DEVONthink To Go. Note, when sharing data, the receiving application is responsible for how it interprets the incoming data.

The *Open in* option allows the receiving application to open the file in place without generating copies. This allows you to edit a file in an external application without having to search for it first in the file provider within the other application. Edits made in the external application should be shown in DEVONthink To Go when you switch back to it.

In both cases above, be aware the receiving application must support the sharing options and not all applications accept every kind of shareable data. If you don't see the application or desired option, contact the developer to inquire if they'll support sharing in these ways.

> Note: Shallowly synced items, i.e., those whose contents haven't been downloaded, cannot be shared.

Actions: Under the application row in the Share menu, there is a list of actions that act directly on the document. You can, e.g., print it or copy its item link. Some actions will allow copying a file to another application. Other actions may be Shortcuts you have created or installed. Here are some example actions you may see:

- **Print:** Prints the document to AirPrint-enabled printers.
- **Capture:** Captures the displayed web page.
- **Copy Item Link:** Copies a URL for the document that you can use to link to the document from other apps. For PDF documents it links to the currently displayed page.
- **Copy URL:** Copies the URL from the document's *Info* popover.
- **Open URL:** Opens the URL from the document's *Info* popover in the default browser.
- **Reply by Email:** Creates a new email as reply to a selected email document.

> Note: You can customize which share extensions and activities are listed here. So if you're missing DEVONthink To Go or another app or would like to hide a rarely used activity, tap *More* at the right end of the row of app icons. Note that not all apps accept all types of data.

USING THE DOCUMENT PROVIDER

DEVONthink To Go has long supported Apple's Document Provider. This provides access to your databases via the Files.app or other compatible applications, notably e.g., Pages, Numbers, Word, and more.

Once DEVONthink To Go is enabled in the *Locations* on the *Browse* screen in Files, you can open documents, drag them to other apps if your device supports it, copy them to other file services, or annotate PDFs using the built-in tools supplied by Files. You can also import files or folders from other sources by dragging or saving them to your DEVONthink To Go database in Files. However, here are some things to note:

- Groups set as favorites in Files appear in the *Favorites* section in DEVONthink To Go.
- Tags set for items in Files are added as tags in DEVONthink To Go.
- Items without their contents downloaded in DEVONthink To Go can't be manipulated in Files.
- Smart groups do not work in Files.

Security: Be aware, if you are using DEVONthink To Go's Privacy > Security settings, the interval you set determines how long before other applications can access your databases. For example, if you have it set to three minutes, you must act within that time frame or access will be locked again. If you have this set to `Immediately`, you will not be able to access your databases externally.

> Note: Files tries to be as nice as possible to the remote service and uses a lot of caching. Therefore you might notice some delays when navigating your databases. Also, databases and groups are shown as 'folders' because that is what Files understands. And finally, in DEVONthink To Go items can be present in multiple groups (replication); Files doesn't support this. DEVONthink To Go always presents items in their 'primary parent' in Files.

USE DRAG-AND-DROP

You can drag items from the item list as well as from the grid view to other places inside DEVONthink To Go and to other apps that accept the dragged data. You can also drop files from, e.g., the Files app or data like text or web addresses into DEVONthink To Go.

In an application that supports it, long-tap an item, drag it, then lift your finger to release it. While you are dragging an item, you can tap on other items with a free finger. This will add them to the selection you're dragging and a badge will appear showing the number of items being dragged. This way you can drag multiple items at once.

DRAGGING IN DEVONTHINK TO GO

If you are dragging and dropping within DEVONthink To Go, long-tap an item. When the context menu appears, move your finger away from the menu. Move the item without lifting your finger. Lift your finger to release, i.e., drop it in its desired location. These are the actions you can do:

- **Onto another group:** Drag the item onto a group in the list view to move it to the group. Drop onto a group to move the item into that group or hover over the group for a moment to navigate deeper before dropping, if desired.
- **Into the list view:** Drag the item into the empty parts of the list view to move it to the group whose content is shown in the list view.
- **Onto another item:** In grid view, drag the item onto another item to group the two. If the other item is a group, the dragged item is moved into it; if the other item is a document, both are placed into a newly created group.
- **Onto the back arrow:** Drag and pause over the back arrow in the top toolbar to navigate to a higher level from the current location.

If you use a hardware keyboard, hold down the *Option* key to copy the items instead of moving them.

IMPORT AND EXPORT

Contrary to macOS, interactions between different apps on iOS are more challenging. Importing and exporting is usually done via the *Share* menu in apps that support it. On devices that support multiple windows, it's possible to drag items into and out of DEVONthink To Go to and from another app.

Open DEVONthink To Go and a second application, e.g., the Files app, in two windows. Long-tap, drag and drop from one application to the other. This can be especially handy with Apple's Mail application

as it doesn't support the *Share* menu. With this method you can drop email messages directly into your database.

> Note: The ability to exchange files via drag-and-drop requires the other application to support receiving files. Also, the receiving application will interpret the dropped data, so we cannot ensure what the result will be. Consult with the developer of the receiving application if there's an unexpected result.

USING SIRI

Go into iOS' *Settings > Siri > DEVONthink* and make sure *Use with Siri requests* is enabled. You can use Siri to:

- Create new plain text notes
- Search for documents
- Say, "Hey, Siri" and speak the name of an Apple shortcut

To find out how to ask Siri to perform these tasks check out Siri's own help which lists sample phrases for DEVONthink To Go.

USING NEWS FEEDS

DEVONthink To Go can act as an RSS feed reader. You can use it to subscribe to news feeds and have the articles automatically downloaded to your database. To add a feed, tap the ⊞ toolbar button and choose *Feed*.

Enter the feed URL and tap *OK*. The feed will be added to your database and the latest articles will be downloaded.

To manage when articles are downloaded, in which format, and how long DEVONthink To Go should keep them, go to Settings > Feeds. You can also choose the article format on a per-feed basis in the feed's *Info* popover.

USE THE FINDER FOR BATCH IMPORTS

If you have a larger number of documents to import from a Mac, synchronizing is the way to go. However, if you don't use DEVONthink on the Mac (but you should, really) or your desktop computer is a Windows PC then there's another way to batch-import files:

- **1:** Connect your iOS device via USB to your Mac or PC and authorize trusting the computer.
- **2:** Select the iOS device in a Finder or Explorer window.
- **3:** Navigate to your device's area, then to *Files*.
- **4:** Drag your files into the *DEVONthink 4* folder.
- **5:** Bring DEVONthink To Go on your device to the foreground.

DEVONthink To Go will import everything that is not one of the default items (`DB5.plist`, `Console.log`, `Sync.log`) into the Global Inbox database.

SYNC

IN THIS CHAPTER

Sync Explained 43
Sync Setup Basics 45
Everything or Just the Metadata 46
Sync: Bonjour 48
Sync: iCloud 49
Sync: Dropbox 50
Sync: WebDAV 51

Given the ubiquity of services like iCloud Drive and our multi-device lifestyles, a question we field almost daily is, "Can I get my databases on both my Mac and mobile device?". If you have a Mac running DEVONthink or another iOS device running DEVONthink To Go, you can have a copy of the same databases on each device. The DEVONthink line of applications has its own sync engine allowing you to keep your chosen databases in sync on or off your local network.

This chapter answers several questions, explains the controls you'll use to sync, and the simple step-by-step instructions for the supported sync types. And as a side note: this chapter isn't longer because sync is complicated; it's longer since we offer more sync options than other applications.

SYNC EXPLAINED

Let's start off with a simple explanation of how sync works.

CHOOSING A SYNC METHOD

Choosing a sync method requires assessing your needs while being aware of technical considerations. Regarding syncing, the first question you need to ask yourself is, "Do I need a remote sync option?". Consider these questions...

- Do you need to sync between machines — especially desktop Macs that aren't easily relocated, unlike laptops — in different geographic locations?
- Do you have a colleague, assistant, significant other, etc. that needs frequent updates to synced data?
- Are you using a shallow sync, i.e., `Download Files: On demand` in DEVONthink To Go?

If the answer is no to these questions, a local sync on your network is suggested.

For the optimal experience, you should use a remote sync option when you need to. Just having a Dropbox, iCloud, etc. account does not make it an optimal solution for all situations. This doesn't mean you can't successfully use a remote solution. It just means there are some stumbling blocks that can occur when using them, blocks caused by the conditions mentioned below that can inhibit proper syncing. If you do need a remote sync option or just want to pursue that avenue for syncing, you need to understand and accept the potential pitfalls involved:

- Network conditions - local and remote
- Remote server reachability and response times
- Maximum concurrent connection limitations imposed by the service
- Bandwidth throttling measures employed by cloud services

COMMON QUESTIONS

There are many questions we get over and over, so here are some important things to understand as well as clarifying some of the terminology.

What is a sync store? : A sync store is a special folder on a server or service (the 'sync location') that DEVONthink To Go uses to store sync data for your syncing databases. Give it a name made only of alphanumeric characters. A concatenated name, e.g., `Research_01` can be used. Note this folder is only for use by our sync engine.

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

What is an encryption key? : All sync methods allow you to specify an optional (but recommended) encryption key for a sync location. The key is an alphanumeric string of your choice and length used to "scramble" or "descramble" the sync data (AES-256).

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

Can I use more than one sync method at the same time? : Indeed this is supported behavior. For example, you may want to set up a Bonjour sync on your local network and a remote sync option for syncing when you're out and about. However, if you want to sync via two cloud-synced services, e.g., Dropbox and iCloud, you should not sync the same databases via two different methods.

Should I use one sync store per database? : This is either a personal choice or a requirement of your specific situation. A sync location can be used with one, several, or all databases. Multiple sync stores can be employed for different sync situations and/or different devices, e.g., to synchronize specific databases via one sync store for personal use and sync others via a second sync store for business purposes.

And while this shouldn't be the first consideration, if you'd like to use one sync store per database or for a subset of them, it may lessen the time troubleshooting a sync issue with a particular database.

How quickly will it sync?: There is no definitive answer here as there is a lot of variability in the situation. For example, if a remote server isn't responding in a timely fashion, transmitting your sync data is slower. Also, DEVONthink To Go's sync does not run constantly. On the automatic schedule, a sync will start up to 45 seconds after a change is saved in a database and every 4.5 minutes of idle time. And while DEVONthink To Go supports background app

refresh, that is a process controlled by the operating system. It allows certain apps to run periodically for a very short time before the process is terminated.

SYNC SETUP BASICS

As DEVONthink To Go can synchronize your data over a number of very different transport channels, setting it up might be a bit more than just tapping a single button. However, the setup is still simple. Here are the basic concepts of getting started with syncing.

SYNC COMPONENTS

No matter what method you ultimately choose, you will revisit the same settings and be presented with many of the same choices. From the simplest iCloud setup to the "complex" WebDAV setup, at most you still will only have a handful of choices to make. Here are the component parts of a sync:

Sync Settings: In DEVONthink To Go you find the sync settings in Settings > Sync by choosing *Settings* in the ⚙ menu in the sidebar/the database list. No matter if you're adding, removing, changing options, or selecting databases to sync, these operations will all be done in these settings.

Sync Locations: The *Locations* list is where you add, remove, or access your sync locations. When you initially set up a sync location, you will see some predefined options, like *iCloud (Legacy)* in the *Locations* list. Select the option you wish to set up. If you have already set up a sync location and are adding an additional one, tap the *Edit* link to display these choices again. You will also edit the *Locations* list if you want to remove a sync location.

Sync Location Settings: When you add a location, it will open the sync location's options. Here you set the specific options for that location, like whether to sync labels and colors. If you'd like to edit the options for an existing location, tap the ⚙ button for the location and choose *Edit* from the menu. Fill out the options available for that type of location. Here are the options you may see, depending on the method you've chosen:

- **Sync Store:** Set the name of the container for your sync data. It's best if you use only alphanumeric characters here. If you are adding an existing sync location, you must enter the same exact sync store name. If you used an encryption key when you initially synced to this location from another device, you must enter the encryption key each time you set up the location on a new device. However, using multiple sync stores could be useful if you are syncing with others, e.g. for business and private, for friends and colleagues, etc.
- **Username/Password:** Enter the appropriate credentials for, e.g., CloudMe or other WebDAV servers you have access to sync to.
- **Key:** Set an optional encryption key. This is a string of your choice used to encrypt the sync data AES 256-bit so it is stored in an encrypted state. This can provide peace of mind if you are using a cloud service for which you have privacy concerns. If you are setting up an existing sync location, you must use the same value you used when

you initially synced. If you didn't use one, you must leave these fields empty. You cannot just add or modify the key after the first sync.

- **Download Files:** Set whether to download contents and metadata (a full sync) or metadata only with the option of downloading content on demand (a shallow sync). See also p. 46ff
- **Labels and colors:** Set whether to sync label names and colors. You may want to disable this if syncing with others.
- **Reading positions:** Set this to sync, e.g., the current page of PDFs between devices.
- **Verify uploaded items:** Set this to add some additional checks to try and ensure sync data has been transmitted properly. This adds some overhead to syncing but can be used if you have a location that seems unreliable at times.
- **Save:** Tap *Save* to finish creating or editing the sync location.

Please find a short glossary about sync-related terminology in the Appendix.

Syncing databases: Whether you're using a new or existing sync location, you will tap the location in the *Locations* list after setting it up. This will list any databases local to DEVONthink To Go or available to merge or import. Any databases that only exist locally, i.e., with no sync data in the current location will be listed as *Local*. Any databases that are not in DEVONthink To Go but are available to import will be listed as *Remote*. And any local databases that have detected but unsynced data with be marked to *Merge*. Flipping the switch next to each desired database will either upload, import, or upload and merge the database.

> Note: If there is a username and password entered for a database in DEVONthink's *File > Database Properties* or the *Info* popover for a database in DEVONthink To Go on another device, you will be prompted to enter these credentials when you try to import the database. This allows you to add a second layer of security for syncing.

Basic steps: The basic steps for setting up syncing are as simple the following steps. Some additional specific information can be found below.

- Visit the sync settings.
- Add a location, if needed, and choose its options as noted above.
- Tap the desired location and toggle databases you'd like to sync.

So no matter if you need to add a location, change options, or toggle syncing a database, you will always return to the sync settings to do so.

EVERYTHING OR JUST THE METADATA

As disk space especially on iOS devices is limited, DEVONthink To Go offers two synchronization modes to let you hand-tailor its sync behavior to your needs. DEVONthink To Go either downloads everything to your device or it just downloads the information about your documents but not the files themselves. The documents show as 'pending' as long as their content has not been downloaded to the device.

- **Download files: Always:** Also referred to as a 'full sync', both metadata and content files are synchronized to the device.
- **Download files: On demand:** Also referred to as a 'shallow sync', only metadata is synchronized to the device; content files are downloaded on demand.

COMPARISON

Both modes have their own advantages and disadvantages. When you choose *Download Files: Always*, you have everything with you offline, metadata and contents, even when you are without an internet or intranet connection. You are independent of network availability. However, this will also obviously consume more space on the device.

When you choose *Download Files: On demand*, the amount of data stored on your device is significantly less and you can carry larger databases with you even on a device with less internal drive space.

You can work with your documents, browse, rearrange, or even trash them. Accessing documents is slower, however, as they need to be downloaded on demand. Also, when you are without a network connection you cannot download the contents of documents until you're back on an active network.

GRANULARITY

DEVONthink To Go lets you fine-tune which content files are synchronized to your device on multiple levels. Here they are in order of their level of control:

- **Sync location:** Open the sync settings, tap *Edit*, and choose the sync location that you'd like to edit. This is the highest level of control. If you set this to *Always*, you will not be able to set databases synced with this location to *On demand*. If you anticipate wanting to use a shallow sync for any database, set this to *On demand*.
- **Database:** Navigate to the top level of the database, then tap the ⓘ button to open the *Info* popover Here you can set an entire database to a full or shallow sync. This can be done on a per-database basis provided the sync location it's syncing with is set to *On demand*.
- **Group:** Navigate to the group, then tap the ⓘ button to open the *Info* popover Set any group to a full sync in a shallowly synced database. This can be useful if there are groups you need to contents to always be synced while other groups can be downloaded as needed. This requires the database to also be set to *On demand*.

> Note: If you are using a shallow sync and set up a new sync location, you will see a warning about the database not having contents to upload. Leave the old sync location active as it contains the contents for the database and tap *Proceed*. Sync will download the necessary content from the old location to be uploaded to the new location. If you are setting up an existing sync location that contains the contents, you can also proceed.

PURGING

Purging removes only the data file of a document. You still see a purged document listed, it's searchable, and you can manipulate it. Purging does not delete the document itself, it just turns it into a 'ghost'.

Manually: You can at any time remove contents to free disk space. Select items in the items list and choose *Purge* in the *Actions* menu.

Automatically: Alternatively you can let DEVONthink To Go choose the documents you haven't used recently, and purge them for you. Choose how many files should have their contents kept on the device in the Settings.

Automatic purging keeps track when documents have been downloaded or accessed so that it only removes the least used contents. It also does not purge documents that have not yet been synchronized to some other location, that are protected by their enclosing group, or that have been downloaded in the past hour. Documents only synchronizing with a direct connection are also never automatically purged.

SYNC: BONJOUR

A Bonjour sync is a direct connection between devices. One device acts as a server, the other a client to that server. There is no intermediary location where data is stored. This is much faster than uploading all data to some server on the internet and downloading it again on another device. It is also much more private since your data remains in your control at all times.

TECHNICAL CONSIDERATIONS

A Bonjour sync is simple but these things need to be considered first:

- The devices must be on the same local network, noting it will not work over VPN.
- You must be on your own network or one that allows Bonjour traffic or non-standard ports. Public, corporate, and academic networks sometimes disallows these.
- If you're running a firewall or network monitoring software, you must add exceptions for DEVONthink To Go's traffic.
- The devices, one acting as the Bonjour server, the other as the Bonjour client, must be on and running DEVONthink To Go or DEVONthink, with the sync databases open.
- There must be only one device acting as the Bonjour server for a set of databases. If you enable it on one mobile device, you should not be enabling it on another device, neither mobile nor Mac.
- Our applications must have local network access, mandated by Apple. On iOS/iPadOS, enable DEVONthink in *Settings > Privacy & Security > Local Network*.

SETTING UP THE SERVER

Here are the steps to setting up DEVONthink To Go as a Bonjour server to be accessed by other devices running our mobile or desktop application.

Step 1: Go into the Synchronization settings and tap *Bonjour*.

Step 2: Enter a mandatory password. This is used by client devices connecting to this one.

Step 3: Tap *Enable incoming connections*.

You can leave the *Port* empty and DEVONthink To Go will pick a random unused port. However, if you have a specific port you'd prefer to use, you can enter that before enabling incoming connections.

DEVONthink To Go is now running as the server of its databases on the local network, visible to your other devices.

SETTING UP A CLIENT

And here are the steps to connect DEVONthink To Go as a client to one of your devices acting as the Bonjour server.

Step 1: Go into the Synchronization settings. You should see the Bonjour server device listed in the local section, whether Mac or mobile. Tap it to display the sync settings.

Step 2: In the sync settings, enable the options you want and set the *Download Files* option. Then press *Save*.

Step 3: When you save the sync location, enter the Bonjour password you created on the server device. If accepted, it will report the location is connected.

Step 4: Tap the sync location to show the databases list and enable databases to import and sync between the devices.

SYNC: ICLOUD

As most Apple devices are already logged into your Apple ID, setting up an iCloud sync is the simplest method of all. Enable it then the databases you want to sync.

TECHNICAL CONSIDERATIONS

There are two iCloud sync methods available in DEVONthink To Go. Both technically behave a bit differently in terms of how the sync data is handled, but they both use the same setup steps. But be aware, you must use the same type of iCloud sync on your syncing devices, e.g., if you start with a Legacy sync, your other device must be doing a Legacy sync.

- **iCloud (Legacy):** With Legacy syncing, initially the sync is done locally. After sync is finished, iCloud uploads to Apple's servers, then to devices using your Apple ID. This means databases may not be immediately available to sync on the other devices. The initial sync requires patience, as DEVONthink To Go has no control over the speed and reliability of iCloud's process.
- **CloudKit (iCloud):** Connecting to the same active iCloud account, the CloudKit option offers a single-stage sync interacting directly with Apple's servers. This can appear to be a bit slower than the legacy option, but once the sync is finished the files are already uploaded without having to wait for iCloud to sync on its own. This also conserves space as no sync data is temporarily stored on the local machine's hard drive.

Note, while the iCloud methods have worked well for many people, there have also been many reports of issues. This is not only specific to our applications but other applications as well.

SETTING UP A NEW ICLOUD SYNC

If you're setting up sync for the first time, follow these steps:

Step 1: Go into the Synchronization > Locations settings.

Step 2: Tap the *iCloud (Legacy)* or *iCloud (CloudKit)* location to open its settings.

Step 3: In the sync settings, enable the options you want and set the *Download Files* option. Enter an encryption key, if desired. Then press *Save*.

Step 4: Tap the sync location to show the databases list and enable databases to import and sync between the devices.

SETTING UP AN EXISTING ICLOUD SYNC

If you have already synced, including from our desktop application, follow these steps, remembering you must use the same method, Legacy or CloudKit:

Step 1: Go into the Synchronization > Locations settings.

Step 2: Tap the *iCloud (Legacy)* or *iCloud (CloudKit)* location to open its settings.

Step 3: In the sync settings, enable the options you want and set the *Download Files* option. If you used an encryption key, enter and confirm it in both fields. Then press *Save*.

Step 4: Tap the sync location to show the databases list and enable databases to import and sync between the devices.

SYNC: DROPBOX

Dropbox was the first supported cloud service and over time, has been a reliable performer for many of our customers. While there are a few technical details you need to be aware of, it's easy enough to set up and sync.

TECHNICAL CONSIDERATIONS

Authentication: Since the Dropbox sync connects and syncs directly with the Dropbox servers, you are required to authenticate the connection. When you first enable a Dropbox sync location in DEVONthink To Go your default web browser will open asking if DEVONthink To Go can access the `DEVONthink Packet Sync` folder. This will need to be done on other devices the first time you set up a Dropbox sync location. Once the authentication is allowed, you subsequently can add and remove other Dropbox sync locations in DEVONthink To Go.

API Restrictions: There are a few things Dropbox' API doesn't allow DEVONthink To Go to do:

- You can't sync between Dropbox accounts, e.g., between yours and a colleague's account.
- You can't connect DEVONthink To Go to more than one Dropbox account at a time.
- You can't share the contents of the `Apps` folder in your Dropbox account, where DEVONthink To Go stores your sync data.

SETUP A NEW DROPBOX SYNC

If you're setting up sync for the first time, follow these steps:

Step 1: Go into the Synchronization > Locations settings.

Step 2: Tap the Dropbox location. The Dropbox application or website will open requesting you to approve DEVONthink To Go's access to your account. After approval, you will be returned to your sync setup.

Step 3: In the sync settings, you'll see the account you're logged into. Give the *Sync Store* a name, ideally with only alphanumeric characters, hyphens, or dashes. Enter and confirm an encryption key, if desired. Set your *Download Files* choice and other options, then press *Save*.

Step 4: Tap the sync location to show the databases list and enable databases to import and sync between the devices.

SETUP AN EXISTING DROPBOX SYNC

If you have already synced, including from our desktop application, follow these steps:

Step 1: Go into the Synchronization > Locations settings.

Step 2: Tap the Dropbox location. Authenticate, if prompted, and you will be returned to your sync setup.

Step 3: In the sync settings, you'll see the account you're logged into. In the *Sync Store* field, tap the down button and choose the existing sync store. Enter and confirm the encryption key, if used when initially synced. Set your *Download Files* choice and other options, then press *Save*.

Step 4: Tap the sync location to show the databases list and enable databases to import and sync between the devices.

SYNC: WEBDAV

We often get requests about supporting other cloud services, e.g., OneDrive. However, it's no trivial task to add and support more and more services. To open up sync opportunities, DEVONthink To Go supports WebDAV, a well-known file transfer technology used across the globe. Some possible options for using WebDAV are: the commercial CloudMe service, using services on a network attached storage device (NAS), or running software like OwnCloud. Note these options can provide more technical challenges in setup and administration beyond the scope of our support. Check the manufacturer or service's support pages for information on setting up a WebDAV server.

TECHNICAL CONSIDERATIONS

Remember WebDAV is a server, so connecting to it is just like connecting to a website using its web address, its URL. Here are important details you need to know:

- **Credentials:** In order to log into the server, you will need to enter your *Username* and *Password*.
- **URL:** In order to connect to a WebDAV server, you need to its URL. The appropriate URL is something you need to get from the cloud service or manufacturer's documentation. For a commercial service, the URL likely is simple. If you're running your own server, it may be more extended.
- **Port:** When using WebDAV with an NAS, you will likely need to enter a *Port* number. This is typically brand-specific, e.g.,

Synology uses `5006`, but can be modified by you, if needed.

- **Path:** You generally cannot write directly to the root of the server, but instead need to use a shared folder. It is best if there are no spaces or punctuation other than hyphens or underscores. A name like `Home_Sync` or `uniSyncData` would work well. Most importantly, the folder name is case-sensitive, so `devonsync` is not `DEVONsync`.

So your URL could look similar to: `https://devoncrew.local:5006/DEVONsync`.

Remote Access: If you're running your own WebDAV server, accessing and syncing to it on your local network is trivial. However, access it from outside your network will require instruction beyond the scope of our help. Check the documentation for the device to see how to set it up.

SETTING UP A NEW WEBDAV SYNC

If you're setting up sync for the first time, follow these steps:

Step 1: Go into the Synchronization > Locations settings.

Step 2: Tap the WebDAV server detected on your network to see its settings.

Step 3: In the sync settings, enter the correct *URL*. Enter the *Username* and *Password*. Give the sync store a name, ideally with only alphanumeric characters, hyphens, or dashes. Enter and confirm an encryption key, if desired. Set your *Download Files* choice and other options, then press *Save*.

Step 4: Tap the sync location to show the databases list and enable databases to import and sync between the devices.

SETTING UP AN EXISTING WEBDAV SYNC

If you have already synced, including from our desktop application, follow these steps:

Step 1: Go into the Synchronization > Locations settings.

Step 2: Tap the WebDAV server detected on your network to see its settings.

Step 3: In the sync settings, enter the correct *URL*. Enter the *Username* and *Password*. Tap the down button in the *Sync Store* field to choose the existing sync store. Enter and confirm the encryption key, if used when initially synced. Set your *Download Files* choice and other options, then press *Save*.

Step 4: Tap the sync location to show the databases list and enable databases to import and sync between the devices.

SETTINGS

IN THIS CHAPTER

About 53
License & Account 53
Help 54
Tips 54
Log 54
Privacy 54
Notifications 55
Sharing & Spotlight 55
Synchronization 55
Interface & Chat 56
AI 56
Data 58
Annotations 59
Versioning 59
OCR 59
Documents 60
Text 60
PDF 60
Markdown 61
Feeds 62
Web 62
WikiLinks 63
Backup 63

Adjust all of DEVONthink To Go's settings directly inside the app without visiting the *Settings* app. Access the settings from the ⋯ menu in the sidebar/the database list.

ABOUT

Check DEVONthink To Go version and build number here. To contact our customer support, tap *Contact us*. This creates a new email via the standard email composer including attached log files that might help us find out more about the issue.

In addition, this screen lists how much disk space DEVONthink To Go's data store consumes, how many items it contains, and when the app was launched the last time.

LICENSE & ACCOUNT

Handle your licensing or connect to your DEVONtechnologies account.

License: View the current license, subscribe, or register your device.

Account: Sign into your DEVONtechnologies customer account to see your available DEVONthink license. Required to register the device with a DEVONthink for Mac license. You can safely log out after registering though staying logged in makes it easier for DEVONthink To Go to verify your license from time to time.

Here are the current licensing options:

- **Subscription:** Choose a monthly or yearly subscription.
- **Register via DEVONthink:** If you have an active DEVONthink Pro or Server license, sign in via the *Account* settings. Your license now will be listed in the *License* settings. Tap the checkmark button next to your license information, enter a unique name for the device, and tap *Register*.

DEVONthink To Go is now fully registered for use.

> Note: Your DEVONthink Pro license gives you five mobile seats, DEVONthink Server 25. Each mobile device you register consumes a seat. However, if you delete and reinstall DEVONthink To Go and register the device again, it will consume another seat. Due to how Apple implemented the operating system for privacy, when you delete the application you remove any unique identifier so when reinstalling and registering the device again, the application has no record of being previously registered.

HELP

This is where you find DEVONthink To Go's documentation. If you are reading this text inside the app, you've found it already.

TIPS

Here you find a the tips and tricks for using DEVONthink To Go that we regularly publish on our blog. A dot on the icon for this section indicates new tips are available.

LOG

DEVONthink To Go presents warnings and errors, depending on their urgency, as alert dialogs or silently adds them to the *Log*.

If there is anything in the log that you need to be aware of, DEVONthink To Go shows the button with a small triangle (if you have added it to your toolbar).

Tap *Clear* to clear all entries.

> Note: In case of problems with this software DO NOT CLEAR THE LOG but contact DEVONtechnologies' support instead. Use the *Contact us* button on the *About* screen. The log is automatically attached for you and helps the developers find out what has happened.

PRIVACY

Secure your data and decide if you are okay with sharing anonymous usage data with DEVONtechnologies.

SECURITY

Protect your data from prying eyes with a passcode and, if your device supports it, Touch ID or Face ID.

Use passcode: Switch this on to enable mandatory passcode protection. This is the main switch for all security.

Use biometric authorization: When switched on DEVONthink To Go will first try to authenticate with Touch ID or Face ID. Should this fail it will ask for the passcode. When this option is switched on and you have already authenticated with your device in the last 30 seconds DEVONthink To Go will not ask you to authenticate again.

Ask again: Set a time period in which DEVONthink To Go will stay unlocked when you put it into the background, e.g., for working with another app.

> Note: When DEVONthink To Go is locked no documents will be available through the Files app. To access your documents externally set an unlock time or disable the passcode protection.

ANALYTICS

Simple, anonymized analytics that let us learn a bit more about which features you are using most. Disable sending any data here if you do not want to do this. Learn more about what kind of data we send in our Privacy Policy.

NOTIFICATIONS

Verbosity: Choose how many notifications you would like to receive:

- **Everything:** All notifications including informative ones.
- **Warnings:** Only warnings and errors.
- **Errors:** Only errors.

Badge: You can also customize the number that DEVONthink To Go shows on its app icon:

- Unread items
- Flagged items
- Labeled items
- None

The app badge always signifies the number of matching items from the global inbox.

SHARING & SPOTLIGHT

Share as: Choose how you would like to share documents: as file, as item link, or as item link ready-to-use in Markdown documents.

Spotlight: Enable integration with Spotlight to make your documents in DEVONthink To Go searchable from Spotlight.

> Note: This option adds to the space used by DEVONthink To Go on the device. Disable it to limit this effect or to avoid private documents turning up in a search outside the app.

SYNCHRONIZATION

Locations: Tap *Locations* to manage your sync locations. An activity indicator next to the button shows that DEVONthink To Go is currently synchronizing. Activate or deactivate any location to keep it from being used for synchronization, e.g., when you're in an environment where synchronizing is not advisable. For more information on syncing, see the Sync chapter.

Use the menu to edit a sync location, to verify it, or to clean it. Verifying makes sure the data in the sync store is intact; verifying thoroughly also attempts to download all files and check them for integrity. Cleaning a sync location removes all data from it.

Bonjour: Tap *Bonjour* to switch on and configure the built-in Bonjour server that allows you to connect to your device from other iOS devices or Macs running DEVONthink To Go or DEVONthink for Mac.

Conflict strategy: Choose whether, in the case of a sync conflict, the newest change wins or DEVONthink To Go keeps both versions.

Schedule: Choose if DEVONthink To Go should synchronize automatically, in a certain interval, or just on demand. Pull down in any database or item list to start the synchronization at any time. DEVONthink To Go will also sync when you switch away from it to another app if you choose to synchronize automatically.

If you choose to synchronize automatically iOS will also wake up DEVONthink To Go from time to time and let it sync. As the time for the background refresh is time-limited, not all databases might get synchronized at a time. You can check when the last sync happened below the *Sync* item in the main settings list.

Retain: If you don't download files automatically, choose whether you want DEVONthink To Go to automatically purge contents and keep only the most recently downloaded or used ones. This does not delete the document record itself but only the underlying content file. Unsynced documents or documents in databases synchronizing not to web-service based locations like iCloud, Dropbox, or WebDAV will never be purged.

INTERFACE & CHAT

In this area you customize the user interface of DEVONthink To Go to your needs.

Toolbars: Both the toolbar of the item list and the document toolbar are partially customizable. Item lists have three custom toolbar buttons, documents two.

Keep groups on top: Enable this option to keep groups always on top in item lists.

Color duplicates & replicants: When enabled, replicants are colored red, duplicates blue. Items that are both replicated and duplicated appear in violet.

Labels: Change the names and colors of the seven available labels that you can assign to items. Names and colors are synchronized between devices as part of the global inbox.

Unify inboxes: Enable this option to display all inboxes in an *Inboxes* section of the database screen. Disabling it displays each database's inbox in its item list.

Unify tags: Enable this option to display the Tags group for each database in a *Tags* section of the database screen. Disabling it displays each database's Tags group in its item list.

Databases show: Select whether the database list shows the number of items in database inboxes or the number of unread items in databases.

Chat text size: Adjust the *Chat* popover text size.

Return key sends message: By default the Chat assistant supports multi-line prompts. Enable this option to use the ↩ *Return* key to send your chat message. If you are using an external keyboard, you can use ⌥↩ to use multiple lines.

AI

If you want to use generative AI in DEVONthink To Go you need to provide it with the necessary credentials or connect it to an AI instance running locally, e.g., on your Mac.

CHAT

Choose your AI model and settings specific to it, as needed. Also set from where the model can get information, if it can effect changes to your database, and what kind of summaries you'd like it to return.

Chat Setup: Specify what large language model (LLM) you want to use and set up any required parameters for it. Note several of the controls here are dynamic and the options will change depending on what LLM you've chosen.

- **Chat:** Choose from the list of supported chat engines, e.g, ChatGPT, Anthropic's Claude, or even one you are running locally.
- **Model:** Choose from the list of models for a specific LLM. Each model may show one of several icons showing its capabilities: 💡 for reasoning, 👁 for vision, ⚙ for tooling, and $ for cost, with the icon's boldness indicating higher or lower costs.
- **API Key:** Enter the personalized key you were provided by your AI service provider.
- **API URL:** Enter the URL of a locally running LLM server. This option will only appear as needed.
- **Usage:** Choose an option to balance cost and quality of results, from fewer tokens with less precision to more tokens but a higher chance of useful results.
- **Context window:** This is the number of tokens at a time the LLM can process and "remember" in a conversation. A larger context window means more data is passed or remembered. However, if you're trying to run a local LLM, larger context windows use more RAM. This also displays how many tokens have been used, sending and receiving responses.

ASSISTANT

Certain AI models have access to "tooling" and may be able to accept DEVONthink To Go-related commands. You need to decide whether to allow it to perform certain behaviors on your Mac and with your databases.

- **Allow property & content changes:** Decide whether the chat assistant can make changes to your database, e.g., add tags to a document or create a new one for you.
- **Allow screenshots:** Allow the AI assistant to capture and examine a screen capture of DEVONthink To Go's window for use in queries. Requires a compatible AI model, e.g, Claude Sonnet.
- **Allow image generation:** Allows the AI assistant to create images, e.g., asking `What does the Eiffel Tower look like?` This utilizes the text-to-image engine chosen in the *AI > Images* settings.

SEARCH

Choose from where you would like the chat assistant to search for information: on the *arXiv*, *PubMed*, or *Wikipedia* websites, on the *Web*, or in your databases.

Select also whether DEVONthink To Go shall conduct web and Wikipedia searches or use search engines such as Perplexity or Exa.ai. External search engines require an API key.

SUMMARIZATION

Choose the model and summary format you'd like in response to asking chat to summarize a document. The choices are:

- **Text:** Gives you a brief synopsis in a few paragraphs.
- **List:** Returns a list of the main points.
- **Key Points:** Provide a distilled response of the main topics.
- **Table:** Create a table of columns and rows, often used for correlating pages or links to text.
- **Custom:** Provide a summary defined by a template you define.

Custom: Create your own prompt defining what kind of response you'd like, including how you'd like the summary to be structured. Use `%@` to refer to the information being summarized.

IMAGE GENERATION

Choose and set up a text-to-image AI model. These controls are dynamic and their options change depending on the model you choose.

- **Model:** Choose a supported text-to-image model, e.g, DALL-E or Flux.
- **Aspect Ratio:** Choose a predefined aspect ratio for the images.
- **Quality:** Decide whether to generate *Standard* or *HD* images, if available.
- **API Key:** Enter the API key you received from the image generation provider, e.g., Replicate.com for the Flux generator.

TAGGING

Set which model you want to use for tagging. Define whether AI can create new tags on your behalf or only use existing tags.

CHATS

DEVONthink To Go remembers your chats. No matter if you're using the global Chat window or chatting about the current document, DEVONthink To Go knows the global AI chat that you can open from the custom toolbar button or the ⊙ menu in the sidebar/the database list, as well as individual chats that are 'attached' to the document you opened them from. This allows you to get back to the same chat every time you work on a document.

Check how many chats DEVONthink To Go has kept and, if desired, clear them.

> Note: DEVONthink To Go remembers up to 100 chats as well as all chats active within the last three months.

DATA

DEVONthink To Go allows you to define your own metadata fields. Use them to spice up your documents with additional information like author names, reference links, ISBNs, or just anything you can think of. You define your metadata here and you use it on the *Data* tab of the *Info* popover.

Use the ⊙ menu to add and remove fields. You can also disable fields to hide them from the *Info* panel without actually deleting them and associated data.

Fields are also typed. Most of the available types are self-explanatory. Some notes:

- **Boolean:** Technically, true or false, this appears as a checkbox.
- **URL:** Add any URL, including URL schemes.
- **Item Link:** Add item links to other documents in your databases.
- **Set:** Define a list of distinct values to choose from.
- **Countries:** Lets you choose from a list of countries.
- **Languages:** Lets you choose from a list of languages.

ANNOTATIONS

Besides the comments field in the *Info* popover you can add longer Markdown notes to any document. These annotations are stored as separate documents linked to the annotated document.

SAVE

Choose where the annotation documents are created: in the same group as the document or in a shared *Annotations* group in the top level of the database.

OPTIONS

- **Move automatically:** Switch on to move annotations when you move the original document.
- **Rename automatically:** Switch on to rename annotations when you rename the original document.
- **Open in edit mode:** Switch on to open annotations in edit mode.

VERSIONING

Using the built-in versioning, you can keep multiple versions of a document and go back to a previous version if needed.

Keep versions: Set how many versions of a document you want to keep.

Maximum size: Set a maximum document size. DEVONthink To Go will only save versions for documents up to that size to save storage space.

Remove after: Adjust when to purge older versions.

OCR

Enable, set languages, and options for OCR.

OPTIONS

Retain annotations: Preserve existing annotations in the output file.

Automatically correct orientation: Let DEVONthink To Go try to automatically correct the page orientation or disable this option.

Move original to the trash: After OCR is finished, the original file will be moved to the database's trash.

QUALITY

Choose a percentage of quality in the image of the output file. Higher values equal larger file sizes; lower values produce smaller files but at a loss of image quality.

LANGUAGES

Enable the languages used by the OCR engine. Install additional languages from the list of available languages as needed. Only enable the minimum number necessary for best OCR results.

DOCUMENTS

GENERAL OPTIONS

- **Use dark background:** Choose *Always light* if you prefer documents to appear in light mode. Or choose *Automatic* to honor the system setting. This option may not be supported by all document formats. Disable the dark background for PDFs in the PDF settings when you don't want images to be shown inverted.
- **Enter Zen mode on tap:** When enabled, tapping a non-interactive area of a document opens switched to a distraction-free mode hiding all user interface controls. Tap the navigation bar area of the document again to show the controls again, e.g., for leaving Zen mode.
- **Automatically mark as read:** Choose if you want documents that you viewed are automatically marked as read.
- **Automatically download:** Switch this setting on to automatically download pending documents when you navigate to them. Logically, the sync location needs to be available.

> Note: Some document types allow quickly changing settings while you're viewing them. In the document's toolbar, tap the button, if available, to access the available settings.

ATTACHMENTS

- **Remote images in emails:** Load images when displaying emails.
- **PDF attachments of RTFs:** Render PDFs attached to RTFD documents or formatted notes inline.

AUTHOR

Enter any name here to be used as author for new PDF annotations.

TEXT

Choose how DEVONthink To Go behaves when editing text.

- **Open immediately for editing:** When enabled, text documents open directly in editing mode.
- **Line height, font, and text size:** Set the line height, font, and text size for plain text documents, Markdown documents in edit mode, and RTF and formatted notes.
- **Automatic caps:** Automatically capitalize words where appropriate.
- **Spelling correction:** Correct spelling automatically.
- **Data detectors:** Automatically detect dates or addresses as live items in text content.

PDF

Choose how to scroll through PDFs and whether to adjust PDFs to dark mode or always show them with their real colors.

OPTIONS

- **Use dark background:** When enabled, PDFs are adjusted to dark mode (if the *Automatic* setting for all documents is enabled). When it is disabled, PDFs are always shown in their real colors.
- **Show quick navigation:** When enabled, tapping a PDF shows a thumbnail bar at the bottom of the screen for quickly navigating to another page. Tapping again hides the thumbnail bar again. Disable this setting if the thumbnail bar frequently gets into your way.
- **Open immediately for editing:** When enabled, PDFs open directly in editing mode.

PAGES

- **Fit:** Adjust pages either always to their full width or let DEVONthink To Go choose an appropriate zoom factor (useful, e.g., for PDFs with a mix of portrait and landscape pages).
- **Pages:** Show two PDF pages next to each other when room is available or only display single pages.
- **First page single:** Show the first page as a single page, if desired, when reading PDFs as two-page spreads.

SCROLLING

- **Scroll direction:** Scroll through PDFs horizontally or vertically.
- **Continuous scrolling:** View PDFs page-by-page or scroll continuously. When enabled, the current magnification is preserved across pages. When disabled, each page turned to is set back to fit to window.

MORE OPTIONS

- **Allow JavaScript:** Enable this option to allow JavaScript in PDFs. This may be required for some interactive PDFs but can be a security risk. Only enable it if you trust the source of your PDFs.

MARKDOWN

Choose how DEVONthink To Go behaves when rendering Markdown. Use additional packages when rendering Markdown.

OPTIONS

- **Force line breaks:** Enable to treat line breaks in Markdown documents are hard line breaks.
- **Syntax highlighting:** Mimics the rendered appearance of certain items, e.g., headings, blockquotes, etc. while editing the source.
- **WYSIWYG images & links:** Enable this to display URLs or image links as hyperlinks or the actual linked image.
- **Open immediately for editing:** When enabled, Markdown documents open directly in editing mode.

EXTENSIONS

- **MathJax:** Use the MathJAX package for rendering mathematical notations.
- **Mermaid:** Use the MermaidJS package for rendering flowcharts and diagrams.
- **Prism:** Use the PrismJS package for syntax highlighting.

CUSTOM CSS AND JAVASCRIPT

Enter CSS style definitions to adjust the rendered Markdown output to your liking. Add additional JavaScript that executes when DEVONthink To Go renders Markdown to modify the rendering even further.

FEEDS

Choose how DEVONthink To Go handles RSS and Atom feeds.

UPDATE FEEDS

- **Update feeds:** Set how often DEVONthink To Go checks for new articles in your RSS and Atom feeds. This also happens in the background but iOS has the final say on the background refresh interval.
- **Convert categories and hashtags:** When enabled, DEVONthink To Go converts categories and hashtags in articles to tags in the database.
- **Skip identically named articles:** When enabled, DEVONthink To Go skips downloading articles with the same title as an already existing article in the feed.
- **Notify about new articles:** When enabled, DEVONthink To Go posts a notification when new articles are downloaded from feeds.

REMOVE ARTICLES

- **Remove articles:** Choose when DEVONthink To Go removes old articles. It will never remove locked articles or articles in locked feeds.
- **Remove immediately:** When enabled, DEVONthink To Go removes articles immediately instead of moving them to the trash.
- **Also remove unread articles:** When enabled, DEVONthink To Go also removes unread articles. Otherwise, only read articles are removed.

ARTICLE FORMAT

- **Article format:** Choose the format for downloaded articles: automatic (HTML or bookmark), RTF, formatted note, Markdown, web archive, or PDF (one page or paginated).
- **Use clutter-free layout:** When enabled, DEVONthink To Go tries to extract the main content of an article and remove ads and other clutter.

WEB

Choose how you would like to use bookmarks and whether cookies and caches should be kept or deleted on app launch.

LINKS

- **Open links:** Choose whether you'd like to open bookmarks and links internally (like a document), in an encapsulated Safari view (safer but separated from the in-app navigation), or externally in your default web browser.
- **Open universal links:** When this option is enabled, DEVONthink To Go opens universal links, e.g., `drafts://`, in their associated app.

COOKIES & CACHE

- **Delete cookie on launch:** When enabled, all cookies are deleted the next time DEVONthink To Go launches.
- **Delete cache on launch:** When enabled, the web cache is emptied the next time DEVONthink To Go launches.

> Note: Cookies and cache are deleted on app launch, not when quitting it, as with the iOS model of terminating apps in the background, it is more reliable to clean up on launch. Switching away from DEVONthink To Go and bringing it back to the foreground does not equal 'launching'. To force a full app launch, quit the app in the app switcher and open it again.

WIKILINKS

WikiLinks are a convenient way to link words in, e.g., a formatted note or Markdown document to other documents in your database. You can choose between multiple styles and define a template for new documents. It is used when you define a word as WikiLink, say by enclosing it in two opening and two closing brackets, but no document is available that matches it. Tap the not-yet-connected WikiLink and DEVONthink To Go creates a new document for you from the template.

MATCHING

- **Automatically:** The master switch. When this option is on, words in, e.g., formatted notes or Markdown will be automatically wikiLinked if another item with a matching name is present in the database.
- **MashedWords:** Matches document names based on joined words, means: leaving the spaces out and capitalizing the beginning of each word and lowercasing the rest. Example: To link to a file named "Demo CSS File" type `DemoCssFile`.
- **Square brackets [[...]]:** Matches words placed into two opening and two closing brackets.
- **Names and aliases:** Matches documents based on their name or any aliases defined in the *Info* popover.

OPTIONS

- **Kind:** Choose whether to match only documents, groups, or both.
- **Case-insensitive linking:** Matches names and aliases case-insensitively.
- **Separators:** Enter the characters you want to use as separators for aliases in the *Info* popover. By default, commas and semicolons are used.

TEMPLATE

Enter a template for new documents created by tapping a WikiLink that has no corresponding document. Insert placeholders via the context menu. Use `%@` as the placeholder for the WikiLinked word.

BACKUP

Export your data for archiving in a safe location. Enable iCloud backups to let Apple back up everything in this app for you.

Export: Tap *Export to Files* to export all downloaded documents of all databases as files-in-folders to Files > On My Device > Export. Please note that only downloaded documents are part of the export and that metadata is not exported separately. You can export individual databases by using the context menu.

Backup data to iCloud: Enable or disable the iOS backup of your databases. Databases are stored outside of the regular application container to make them accessible to the Files app. Unfortunately iOS doesn't count them as part of the app's data size and doesn't allow you to disable backing them up from the system-wide settings. Visit the *About* screen to check the real size your databases use on your device.

FAQ & TROUBLESHOOTING

IN THIS CHAPTER

Security 65
Spotlight 65
Sync 66
Sync: Troubleshooting 66
Contacting Us 67

Get answers to frequently asked questions about DEVONthink To Go.

SECURITY

How secure is my data on my device? DEVONthink To Go relies on iOS' built-in encryption so all data is always stored encrypted and can only be read after your device was unlocked after a restart, e.g. using Face ID, Touch ID, or your passcode. Therefore DEVONthink To Go does not implement any additional encryption for storing the data.

How safe is my data during a sync? If you set an encryption key for a sync store all data is AES 256-bit encrypted before leaving the device and is stored in an encrypted state in the sync location. It can only be retrieved using the correct key. The same is true for direct connections where all data is encrypted using the password set in the Bonjour options.

In addition, if you specify a username and password in the *Info* popup for a database, those credentials must be entered when importing the database to another device running DEVONthink or DEVONthink To Go via sync. The database cannot be imported without entering the correct credentials.

How safe is my data in an iCloud backup? In general, Apple encrypts the backups stored in iCloud. There are, however, countries that require Apple giving them access to the backups in case law enforcement requests it. As of this writing, only the United Kingdom does this but there might be others. You may want to check with your home country's laws.

SPOTLIGHT

What data is available in Spotlight? Spotlight receives the name, the first 16 KB of text content, the comment, and the tags for each item as well as metadata like the item's type, its icon, and the creation and modification dates.

Why only 16 KB of text? This seems to be the internal limit of Spotlight.

What if Spotlight shows no results from DEVONthink To Go? Check DEVONthink To Go's settings in the Settings app and make sure that *Search & Siri Suggestions* is switched on. Check also DEVONthink To Go's *Settings*. Then try to search for terms that you know that occur in the document, e.g. in its title. If still no results show up rebuild the Spotlight index.

SYNC

Do I have to sync whole databases? No. DEVONthink To Go always syncs the metadata for whole databases but you can select for the location, the database, or individual groups if you want to sync their content files too. If you sync only the metadata you can download the actual content later on demand. See also p. 46ff

I have lost my encryption key. Can you recover it? In the case you are only running DEVONthink To Go, not DEVONthink on the Mac, the answer is unfortunately, no. The encryption key is never shared with DEVONtechnologies. And if we could recover your encryption key anyone else could do this too. We're also using strong encryption to ensure that your privacy (at the time of this writing) can't be cracked without substantial computing power, if at all. It is wise to employ a password manager or some other tactic to store the encryption key.

If you are also successfully syncing DEVONthink on a Mac to the sync location in question, contact us for instructions on looking up the key on the Mac.

Are multiple Dropbox accounts supported? No. The official Dropbox API only pairs with one account at a time.

Can I sync between multiple iCloud accounts? No. An iOS or macOS device is always only paired with one account at a time.

Does the sync work with OneDrive, Google Drive, etc.? Not yet. If you would like to use DEVONthink To Go with a service that is not yet supported, let us know. We might add support for it in a future release.

What do I do if I cannot get it to work? First check out our troubleshooting section. If you still cannot get it to sync, contact us.

SYNC: TROUBLESHOOTING

The synchronization was designed to run in self-maintenance mode so there should be little for you to do to make it work. If, however, it does not work as expected, please try the following steps before contacting our user support:

- Check your network connections.
- Restart this device.

If you experience that DEVONthink To Go does not finish an initial sync of a larger database make sure that your device does not go to sleep. DEVONthink To Go already asks to stay awake but in doubt set iOS' auto-lock setting to 'never' temporarily.

ICLOUD

For iCloud sync check the following:

- Check if iCloud is correctly set up for your device in the device's *Settings*.
- Check that you have entered the encryption key correctly.
- Check that your device has a working internet connection.

WEBDAV OR DROPBOX

For WebDAV or Dropbox locations, check the following:

- Check if the service you're trying to connect to is reachable.
- Check that your service uses HTTPS. Unencrypted HTTP is no longer supported by iOS.
- Check that you have entered your user credentials correctly.
- Check that you are connected to the right WebDAV or Dropbox account.
- Check that you use the same sync store name and encryption key.

In some circumstances, our support may tell you to verify or clean the sync location or database.

- **Locations:** Visit *Settings > Locations: Edit locations*, then left swipe on the sync location.
- **Databases:** Visit *Settings > Locations: Edit locations*, select the sync location then, left swipe on the database.

The swipe actions let you verify locations and databases either quickly or thoroughly, or clean them. Cleaning removes the content of the sync location or database in the sync store. It does not, of course, delete the database from this or other devices.

BONJOUR

For direct connections also check the following:

- Restart the other Mac or iOS device.
- Restart your router.
- Check if this device is connected to the same WiFi network as the other side.
- Check if both devices are on the same subnet.
- Check if there are any routers or switches involved. The more switches and routers the less reliable the connection due to port filtering, conflicts, or other unknown factors.
- Check the port number on the server side. Best practice is to leave the field empty and let DEVONthink To Go choose the port number for you. If you activated serving Bonjour on more than one device every device MUST use a different port number. See also p. 48ff
- Check that the port number used on the server side isn't blocked by your firewall or your router's security.
- Check that you have entered the same password that you have set in the other side's Bonjour options.
- Check if the firewall or Little Snitch enables incoming connections to DEVONthink.
- Check if DEVONthink is running on the other Mac or iOS device.
- Check if the databases you want to synchronize are open on your Mac. To open them automatically, visit *Preferences > Sync* in DEVONthink on the Mac, click *Bonjour Options* and activate the option *Open databases automatically*.

> Note: If your router offers multiple networks, e.g. a slower and a faster one, make sure both devices use the same network. Restarting any device could make them connect to a different network.

CONTACTING US

To get in touch with us visit our user forum, check out our Support page, or send us traditional email.

How can I provide data for debugging? If our customer support ever asks you for device logs there are a few ways to provide information to us:

- Use the *Contact us* option in Settings > Help. A draft email will be created with info and logs attached. Add a brief description of the issue you're reporting, then send the email.
- Alternatively you can connect your device via USB to a Mac or PC. Open a window for your device in the Finder, then navigate to *Files > DEVONthink*. Here you'll find the `Console.log` file that you can download to your computer and send to us.
- If you are experiencing a crash, locate the logs in iOS' *Settings > Privacy > Analytics & Improvements > Analytics Data*. Send us the most recent `DEVONthink(…).ips` file.

APPENDIX

IN THIS CHAPTER

Glossary	69
Iconology	71
Tagging	72
Search Operators	73
Item Links and Paths	76
Shortcuts Actions	77
URL Commands	78
Utility URL Commands	81
Supported UTIs	82

The appendixes give additional information to help you getting familiar with DEVONthink To Go, e.g. a glossary of commonly used terms and a search operator cheat sheet.

GLOSSARY

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

INTERFACE ELEMENTS

- **Share menu:** System-provided menu with commands for sharing documents or opening them in other apps.
- **Context menu:** The menu that appears when you long-press some elements, similar to the context menu on the Macs.
- **Database screen:** The first screen in DEVONthink To Go's hierarchy that lists databases and smart groups.
- **View/Edit pane:** The right-hand side part of the screen where document contents are shown. On iPhone this view appears via push navigation.
- **Item list:** A list of items stored in the database. Items can be documents or groups.
- **List view:** The left-hand part of the screen where databases or items are listed.
- **Actions menu:** A menu that lets you, e.g., move, replicate, trash, etc. documents or groups.
- **View options:** Settings that define e.g. the sort order per group.

DOCUMENTS & GROUPS

- **Database:** The collection of all documents.
- **Content:** A document's data file, e.g. the actual image. A document synchronized from a sync store can be present but have no content; you can download the file on demand when you need it.
- **Document:** A file in the database, e.g. a PDF.
- **Group:** A collection of documents or other groups inside a database.
- **Global Inbox:** The one inbox that collects it all.
- **Inbox:** A special group for data coming in to a database.
- **News Feed:** A news feed is like a web page, but split into multiple newsbits. A feed reader or web browser can split the feed "page" into its parts and show each of them as a separate news item and/or store it in a local database. DEVONthink To Go stores feeds in a database and displays them like a group; contents are updated live from the internet as the connected feed changes.

Older news bits are kept, while fresh news bits are added and marked as unread.

- **Reading List:** A global list of documents or URLs that you are planning to read. The Reading List is synchronized betweem all devices taking part in a sync. The reading list appears as a smart group on the database screen.
- **Replicant:** An item that appears in more than one place in the database. Like two phone book entries for the same person.
- **Sheet:** A table of data, like a simple spread sheet.
- **Smart group:** A 'saved search' that appears like a group. You can create smart groups by doing a search and saving it.
- **Tags:** A special group storing tags.
- **Trash:** Stores all trashed items until you empty it.

TAGS

A tag is a different visual representation of a group. Technically groups (folders) and tags are exactly the same; groups are just shown as 'containing' the item while tags are 'attached' to it. DEVONthink To Go treats both the same. Add a tag to an item and it'll be added to the *Tags* group of the database. Open the *Info* popover and both the groups containing the item and the attached tags are listed in the *Tags* field. See also p. 72ff

- **Group tags:** Tags represented by a regular group.
- **Ordinary tags:** Tags created by adding a tag to a document.

ITEM PROPERTIES

- **Flagged/Unflagged:** Items can be checked or unchecked for your personal use, e.g., for creating a to-do list, maintaining a shopping list, or writing a list of project tasks.
- **Locked/Unlocked:** Items can be locked to keep them from being unintentionally deleted (groups, documents) or modified (documents).
- **Read/Unread:** Items can be marked read or unread, which is useful for documents that you want to read later.
- **Rating:** Items can have a rating from zero to five stars. Use them to your liking.

You can quickly find flagged, unread, or rated items using search.

SYNCHRONIZATION

- **Sync location:** Sync locations are used to keep your databases on all your devices in sync. They summarize all information about which databases to sync through what kind of connection (e.g. direct connections to DEVONthink on a Mac, iCloud, WebDAV, CloudMe, Dropbox etc.) and with which sync store.
- **Sync store:** Server-based locations, e.g. WebDAV or Dropbox, can contain multiple 'sync stores'. Technically a sync store is a folder on the server volume. Use multiple sync stores to e.g. sync both your personal and your business databases at the same location but keeping them separate nevertheless. Sync stores can be encrypted and each sync store at a location can have a different encryption key. iCloud sync uses a single, predefined sync store.

- **Direct connection:** A sync location that doesn't store its data on a server but directly connects to a Mac running DEVONthink or DEVONthink To Go respectively. When this device is not on the same WiFi network or DEVONthink/ DEVONthink To Go is not running the direct connection is disabled and listed as offline.
- **Local database:** A database that exists on this device.
- **Remote database:** A database that exists at the sync location, e.g. on Dropbox, but is not yet downloaded to this device.

AI

- **AI model:** The specific model from an AI provider used to process your chat, e.g., Claude 4 Sonnet
- **API Key:** This is a personal key provided by an AI provider, e.g., OpenAI, that lets you access and use their servers and data to chat with. You enter this into the *AI > Chat* settings.
- **Context window:** The context window is how much information an LLM can process. This can include the content of previous queries. Consider it the short term memory of an LLM. The larger the context window, the more information it can use to generate appropriate responses.
- **Hallucination:** An incorrect or irrelevant AI response. This is much more common when trying to run a local LLM with a small model.
- **LLM:** The acronym for Large Language Model, focused on text processing and generation. ChatGPT and Claude are LLMs.
- **Prompt:** This is the question or command you set to your AI model.
- **Role:** A "persona" sent to the AI used to direct the responses, either on the part you or the AI.
- **Tokens:** Tokens are how your chats are processed by AI. Chats become words, then tokens to be matched and rebuilt into words then responses.
- **Tools:** AI capable of accepting DEVONthink To Go-specific commands, e.g., document creation, database searching, etc.
- **Reasoning:** AI using a deeper, recursive approach to responding to a question, often returning a preamble of its "thinking".
- **Vision:** AI capable of analyzing images, e.g., summarizing an image.

ICONOLOGY

Additional icons below item names show e.g. that items are flagged or unread. Icons are only shown if *Show details* is switched on in the group's view options.

- Item is labeled; the icon is colored in the label's color.
- Item is flagged.
- Item is unread.
- Item is locked.
- Item is encrypted (applies only to PDFs).
- Item has an attached annotation.
- Item has an attached chat.
- Item has comments.

The following icons show if items are replicated or have been recognized as a duplicate. Replicants are items that are located simultaneously in more than one group but physically only present once; duplicates are items that are physically present multiple times and have the exact same content.

- Item is replicated.
- Item is a duplicate.
- Item is both replicated and duplicated.

TAGGING

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

INTRODUCTION

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

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

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

- **Assign a tag:** The item is replicated to the *Tags* group.
- **Remove a tag:** The item's replicate in the *Tags* group is deleted.
- **Adding an item to a group:** The group's name and the names of all groups containing the group appear as tags attached to the item.
- **Moving an item:** The new group's name and the names of all groups containing it appear as tags attached to the item.
- **Replicating an item:** The new group's name and the names of all groups containing it appear as tags attached to the item, too.

Tags represented by a regular group are called 'group tags'; tags created without an existing group are called 'ordinary tags'. See also p. 70ff

THE TAGS GROUP

Every DEVONthink To Go database contains a top-level group named *Tags*.

When you add a tag to an item, e.g., through the *Info* popover, DEVONthink To Go creates a group for the tag in the *Tags* group and replicates the item to it.

When you rename a group inside the *Tags* group, all items tagged with it will show the change, too.

Use the *Tags* group to find all documents tagged with a specific tag or use the *Tags* smart group on the database screen to list all tags in all databases.

SEARCH OPERATORS

DEVONthink To Go allows you to use prefixes, Boolean operators, and parentheses to fine-tune your search.

WORDS, TOKENS, AND QUERIES

- **Word:** A sequence of letters delimited by white space or a punctuation character.
- **Token:** DEVONthink To Go stores its full-text index as tables of tokens. Usually a token equals a word.
- **Phrase:** An ordered sequence of tokens either concatenated by + signs or enclosed in double quotes.
- **Query:** One or more tokens connected by operators and grouped with parentheses.

Words containing non-alphanumeric characters are split internally into a phrase, e.g. `1234/5678` will technically be searched as `"1234 5678"`.

CASE

Tokens are case-insensitive; operators have to be entered in all caps. You can capitalize tokens in your query but DEVONthink To Go will ignore case when interpreting it.

WILDCARD

- `*` Matches exactly one character.
- `?` Matches none, one, or multiple characters.
- `~` Preceding a token with `~` is equal to `*token*`.

> **Example:**
> `devon*`
> `~devon`
> `devon*`

The first form matches all documents which name, content, or comment contains at least one word that begins with `devon`. The second finds the word `devon` also inside of words. And the last form matches all words ending in `devon`.

PREFIXES

The scope buttons below the search field let you narrow results to only the current database or even just the current group. To further narrow down your search by searching e.g. only by name or in the comments, use the following prefixes:

- **name:** Searches only in item names
- **comment:** Searches only in comments
- **content:** Searches only in contents
- **tags:** Searches only in tags

Search prefixes consist of the prefix followed by a colon. They only apply to the next token, not phrases or queries. Add a prefix before every token within a query.

> **Example:** `name:devon* content:eric tags:blue`

Finds all documents with names containing words starting with `devon`, content containing the word `eric`, and being tagged with `blue`.

When searching the `tags:` prefix, enclosing the tag in double quotes finds an exact match (case-insensitive). The following search finds only items tagged with a tag named `fiction` but no items tagged with, e.g., `science fiction`.

> **Example:** `tags:"fiction"`

FILTERS

Like search prefixes, filters can be used to narrow down the search results by certain criteria. Some can be entered just like prefixes: as a word followed by a colon and one or multiple parameters. Others, like size or date filters, require an operator like < or >.

Here's a list of filters you use with a colon:

- `kind`: Filters results by kind
- `extension`: Filters results by file name extension
- `filename`: Filters results by file name. Use the `?` (one character) and `*` (0 to any number of characters) wildcards anywhere in the parameter.
- `aliases`: results by an alias. Provide a partial alias name after the colon or use quotes to search exactly.
- `label`: Filters results by labels, numbered from 0 (no label) to 7.
- `rating`: Filters results by rating from 0 (no rating) to 5.
- `url`: Filters results by returning only items with a URL containing the search words following the colon.
- `additiondate`: Filters the result by addition date, e.g., `additiondate:last week`). Accepts also `addition:`.
- `modificationdate`: Filters the result by modification date. Accepts also `modification:`.
- `creationdate`: Filters the result by creation date. Accepts also `creation:`.
- `openingdate`: Filters the result by the date an item was last viewed.

The following filters take the form `key [operator] value` with operators being <, <=, =, >=, >:

- `wordcount`: Filters result by word count, e.g. `wordcount > 250`
- `charactercount`: Filters result by character count, e.g. `charactercount > 20000`
- `size`: Filters results by file size, e.g., `size >= 10 MB`
- `width`: Filters images and PDFs by their width.
- `height`: Filters images and PDFs by their height.
- `item`: Filters, e.g., by flag, read/unread status, and more

Kind: Possible, self-explaining values that you can use with the `kind:` prefix are: `any`, `audio`, `bookmark`, `document`, `email`, `feed`, `formattednote`, `group`, `html`, `image`, `markdown`, `pdf`, `rtf`, `script`, `sheet`, `smartgroup`, `tag`, `text`, `video`, `webarchive`, `xmlfile`, `zip`.

> Note: `kind:any` is a synonym for `kind:document`. Filtering for `kind:tag` does not honor group tags excluded individually from tagging.

Item: You can use the following, self-explaining values with the `item:` filter: `downloaded`, `duplicated`, `flagged`, `indexed`, `locked`, `pending`, `read`, `replicated`, `tagged`, `unflagged`, `unlocked`, `unread`.

Another set of possible values fall into the "contains" category: `aliased`, `annotated`, `chat`, `commented`, `data`, `metadata`, `thumbnail`, and `url`.

> Note: Not supported are the values `reminded` and `scripted` which are Mac-exclusive at this time.

You can also use the special value `favorite` to recreate the no longer existing *Favorites* global smart group. The special value `chat` lists all documents with associated chats (you cannot use this value in local smart groups).

Dates: You can use standard date formats, e.g., the reverse European notation like `2021-07-01`, or relative dates from the following list: `today`, `yesterday`, `this week`, `last week`, `this month`, `last month`, `this year`, `last year`, `this quarter`, `last quarter`, `this hour`, `last hour`.

> Example:
> `devontechnologies kind:pdf item:flagged item:downloaded modificationdate:this quarter`

The first example above finds all PDFs containing the word "devontechnologies", the second one all flagged documents that you have downloaded to your device, and the first one all items modified this quarter.

CUSTOM METADATA

In addition to the default fields you can also search for internal and custom metadata. Internal metadata keys include:

- `md_annotationscount`: Filters by number of annotations.
- `md_attachments`: Filters by number of attachments.
- `md_language`: Filters by language.
- `md_area`: Filters by geolocation area.
- `md_country`: Filters by geolocation country.
- `md_locality`: Filters by geolocation locality.
- `md_zipcode`: Filters by geolocation zip code or postal code.

You can look up the prefixes for the metadata fields you have defined in Settings > Data.

BOOLEAN OPERATORS

The operators (often called Boolean operators) are words or symbols that establish logical rules for the queries in the search query.

Operators have to be entered in capitals. If no operator is given between phrases or `NEAR` groups, DEVONthink To Go assumes `AND`.

The available Boolean operators are:

- `query1 AND query2`: Contains `query1` AND `query2`
- `query1 OR query2`: Contains `query1` OR `query2`
- `NOT query`: Does not contain `query`
- `"query1 query2 ..."`: Matches the queries `query1` and `query2` etc. in exactly this order and with no other tokens between them.

Besides the classic Boolean operators, DEVONthink To Go allows you to use `NEAR` to find documents containing phrases (not whole queries) in a specified proximity of each other. DEVONthink To Go supports two syntaxes.

- `phrase1 NEAR phrase2`: `phrase1` appears 10 words or less before or after `phrase2`
- `phrase1 NEAR/n phrase2`: `phrase1` appears n or less words before or after `phrase2`

When evaluating the query, DEVONthink To Go processes the queries using the following rule of precedence (high to low):

- `AND`
- `OR`
- `NOT`

You can override the default behavior by using curly braches and the `any:` and `all:` compound operators:

> **Example:** `Steve NEAR/2 Jobs {any: iMac {all: iPad MacBook}}`

This query looks for documents that contain the words `Steve` and `Jobs` more than two words away from each other, as well as either the word `iMac` OR the words `iPad` and `MacBook`.

SYNTAX DESCRIPTION

> Note:
> The following describes the syntax in Backus-Naur form.

```
<phrase> := [*| string [*]
<query> ::= [<colspec> :] <phrase>
<query> ::= [<colspec> :] <neargroup>
<query> ::= {all: <query> }
<query> ::= {any: <query> }
<query> ::= <query> AND <query>
<query> ::= <query> OR <query>
<query> ::= <query> NOT <query>

<colspec> ::= colname
<colspec> ::= { colname1 colname2 ... }

<neargroup> ::=
<phrase> NEAR[/N] <phrase>
```

ITEM LINKS AND PATHS

Using a custom URL scheme you can link to items in your databases from other applications. Place an 'item link' into the notes field in OmniFocus or or any other software that allows you to add URLs.

LINKING TO ITEMS

Use the context menu to obtain a universal link for the item. You can use this link in any application that lets you use URLs, e.g. Calendar, OmniFocus, etc. Tap an item link to open DEVONthink To Go and show the linked item. In addition, you can use item links for images or links in Markdown and HTML documents.

Item links look like this:

```
x-devonthink-item://<UUID>[?page=<number>]
```

The UUID is a string of letters and numbers separated by hyphens that represents the universally unique identifier for the item. You can use the UUID of a group also as destination in a bookmarklet URL. In addition, DEVONthink To Go recognizes some special values for directly linking to smart groups (see below).

The 'page' parameter is optional. Use it to directly refer to a specific page of a PDF.

> Note: Text in <angle brackets> means that its variable; text in [square brackets] means that the part is optional.

> **Example:**
> `x-devonthink-item:// AA1891E1-40B5-40BE-9DB7-AC8B56FA6B80? page=6`

USING PATHS

In Markdown and HTML documents you can use absolute and downward-relative paths to link to images and other documents saved in your DEVONthink To Go database.

To add an image named `Illustration` and located in the group `Images` at the same level as the Markdown document, you'd use e.g. the following code:

```
![Illustration](Images/Illustration)
```

In an HTML document linking to the image would look like this:

```
<img src="Images/Illustration" />
```

An absolute path would look like this when the Markdown document is located in the group `CoolStuff` in the top level of the database:

```
![Illustration](/CoolStuff/Images/
Illustration)
<img src="/CoolStuff/Images/
Illustration" />
```

> Note: Relative paths only work down the group tree. It's not possible to use '..' to travel up. So for relative paths to work the item needs to be located in the same group as the Markdown document or a subgroup of it.

SHORTCUTS ACTIONS

In addition to its URL scheme, DEVONthink To Go has its own set of Shortcuts actions. String together a series of actions to do a variety of things: find, create, update, and organize items in your databases.

ITEMS

Shortcut actions work with 'items', which are objects representing databases, groups, and documents in DEVONthink To Go. You obtain items by using, e.g., the `Get Item` or `Find Items` actions. Access their properties and use them in any way Shortcuts allows.

ACTIONS

The available actions are:

- **Create Item:** Create an item in a specific location. This supports creating bookmarks, plain text, Markdown documents, groups, and files. you can also set basic metadata such as a url, label, a comment, etc. when the file is created. The `file` option requires setting a proper unique type identifier (UTI).
- **Find Items:** Search for items in a location specified by the `scope`. Search prefixes are supported in the query.
- **Get Content of Item:** Get the content of a item as a file.
- **Get Item:** Get an item by it's UUID or item link.
- **Get Items of Group:** Get items in a group.
- **Get Selected Item:** Get the items last recently selected in the app.
- **New Note:** Opens DEVONthink To Go and lets you directly create a new note.
- **New Scan:** Opens DEVONthink To Go directly into the scan interface.
- **Move Item:** Move an item from one group to another.
- **Open Item:** Open an item in DEVONthink To Go. For example, this can be used for displaying a newly created file.

- **Trash Item:** Move an item to the Trash of its parent database.
- **Update Content:** Update the content of a file with data from the clipboard, the current date, or the results of previous action. This works only with plain text and Markdown documents.
- **Update Item Metadata:** Update the metadata of an item, e.g., changing the title, label color, adding tags, etc.

Some parameters in the actions will allow you to search for and choose an item in your databases, e.g., the `query` parameter in `Find Items` action.

In conjunction with the other available actions, some quite sophisticated automated processes can be achieved.

URL COMMANDS

DEVONthink To Go allows you to execute certain actions by opening links, URLs, that begin with `x-devonthink:` or `x-devonthinktogo:` instead of, e.g., the well-known `http:`. You can add these links to other apps, e.g., OmniFocus, or even paste or type them into the address bar of Safari. Instead of opening a web page they activate DEVONthink To Go and make it do something.

URL schemes can still be used for actions in DEVONthink To Go, but many actions are now more easily done with our Shortcut actions. URL schemes may still be useful in other instances, e.g., working with external applications. Be sure to check out the Shortcut actions before committing to a URL scheme.

For Shortcuts and other automation tools, DEVONthink To Go supports the x-callback-url protocol. Many commands listed below can be used either directly or as x-callback-url command.

A URL command for DEVONthink To Go is constructed as shown:

```
x-devonthink://<cmd>[?
<par1=value1>[&<par2=value2>...]]
x-devonthink://x-callback-url/<cmd>[?
<par1=value1>[&<par2=value2>...]]
```

All parameter values have to be percent-encoded. If you are manually building URL commands, you can use online tools like urlencode.org to encode the values.

By default x-callback commands that return data send it in the `text` parameter with the `input` parameter set to the string `text` (required e.g. by the Shortcuts app). If needed for your workflow you can provide your own parameter name here via the `retParam` parameter.

ADDING DATA

- **clip:** Opens the New Document Assistant, pre-filled with the provided data.
- **createbookmark:** Creates a new bookmark.
- **createdocument:** Creates a new document from UTI and file data.
- **creategroup:** Creates a new group.
- **createhtml:** Creates a new HTML document.
- **createformattednote:** Creates a new HTML-based formatted note document.
- **createimage:** Creates a new image.
- **createmarkdown:** Creates a new Markdown document.
- **createtext:** Creates a new plain text document.

- **createwebarchive:** Creates a new webarchive.
- **import-clipboard:** Imports data from the clipboard to the global inbox.

Depending on the command you have to provide additional data via parameters:

- **destination:** The UUID of a group or database where the item shall be created. If not given the global inbox is targeted.
- **title:** The title of the item to be created.
- **comment:** A comment to be added to the item.
- **location:** The URL linking to the content, e.g., the URL of the website for the bookmark or the image. Required for web archives and images.
- **source:** Base64-encoded file data for `createimage` and `createdocument`, raw HTML data for `createhtml` and `createformattednote`.
- **tags:** Comma-separated list of tags to be attached to the created item.
- **text:** The text content for text documents.
- **uti:** The UTI for the document (only used for and required by `createdocument`).
- **flagged:** Marks (1) or unmarks (0) the item as flagged.
- **unread:** Marks (1) or unmarks (0) the item as unread.
- **label:** Sets the item's label (0-based index or name of the label).

> Note: If the `destination` parameter is not specified the item is created in the global inbox. You can find the UUID of a group by getting its item link and cutting the UUID out of the URL (the long alphanumeric string after `x-devonthink-item://`).

> **Examples:**

```
x-devonthink://createbookmark?
location=http%3A%2F
%2Fwww.nytimes.com&title=New%20York
%20Times
x-devonthink://x-callback-url/createtext?
title=Robotic+manta+ray&text=Building+a
+robot+is+easy.+But...
```

MODIFYING DATA

You can modify content and metadata of existing items using URL commands.

- **update:** Updates an existing item.
- **append:** Appends text to an existing plain text or Markdown document.

You need to provide the following parameter to reference the document that you want to modify:

- **uuid:** The UUID of the item, e.g., derived from an item link (see above).

In addition, the commands optionally take one or more of the following parameters (`append` only uses and requires `text`):

- **destination:** The UUID of a group or database where the item shall be moved to. You can only provide one destination; if the item was previously replicated to more than one group it will be unlinked from all of them and placed into the new group.
- **title:** A new title for the item.
- **comment:** A comment to be set in the item's metadata.
- **location:** A URL to be set in the item's metadata.
- **source:** Base64-encoded file data to be set as the item's new content.
- **tags:** Comma-separated list of tags to be added to the item. If the item was already

tagged the previous tags are removed and the new set of tags is added.

- **text:** Text content to be set for or appended to the document (required by `append`).
- **flagged:** Marks (1) or unmarks (0) the item as flagged.
- **unread:** Marks (1) or unmarks (0) the item as unread.
- **label:** Sets the item's label (0-based index or name of the label).

At least one of these parameters has to be given as otherwise there's nothing to modify. The `source` and `text` parameters are mutually exclusive with `source` taking precedence if both are present.

> **Examples:**
> `x-devonthink://x-callback-url/update?uuid=50EA48F6-D528-4512-B528-B9F24F46185F&title=New%20York%20Times&location=http%3A%2F%2Fwww.nytimes.com`
> `x-devonthink://x-callback-url/append?uuid=50EA48F6-D528-4512-B528-B9F24F46185F&text=Building+a+robot+is+easy.+But...`

RETRIEVING DATA

You can retrieve metadata about a document or even the document content (up to 10 MB in size) using the following two commands. As they deliver raw data they only work when called with the x-callback-url protocol variant.

- **item:** Returns selected metadata of a document as JSON object.
- **content:** Returns the content of a document as base64-encoded data.
- **list:** Returns a JSON array describing the contents of a group.
- **get-itemlink:** Returns the item link for the currently selected document.

The commands `item` and `content` take the following parameters:

- **uuid:** The UUID of the document, e.g., derived from an item link (see above).

The data is sent back in the following parameters of the x-success URL:

- **text:** The base64-encoded document data or the metadata as JSON object.
- **input:** `text` (for Shortcuts).
- **uti:** The UTI of the document (`content` command only).

> **Example:**
> `x-devonthink://x-callback-url/item?uuid=50EA48F6-D528-4512-B528-B9F24F46185F&x-success=workflow%3A%2F%2Frun-workflow%3Fname%3DItemMetadata`

SEARCHING

Search your databases.

- **search:** Search DEVONthink To Go and show or retrieve the results.

The command takes the following parameters:

- **query:** The query to use for the search.
- **scope:** The UUID of the database or group to search. Optional; if not set DEVONthink To Go searches all databases.

When called in the regular form the command navigates to either the database or group given as scope or to the global inbox. It then shows the search field, sets the scope button, and enters your query.

When called in the x-callback-url form DEVONthink To Go executes the search and sends the results back:

- **text:** The results as JSON array of objects.
- **input:** `text` (for Shortcuts).

> **Examples:**
> `x-devonthink://search?query=devonthink+AND+%28mac+OR+ios%29`
> `x-devonthink://x-callback-url/search?query=devonthink+AND+%28mac+OR+ios%29&scope=50EA48F6-D528-4512-B528-B9F24F46185F&x-success=workflow%3A%2F%2Frun-workflow%3Fname%3DSearchResults`

EXPORTING DATA

Export your databases as files-in-folders to the Files app. You'll find your exported archives in `On My Device > DEVONthink > Export`.

> Note: Shortcuts actions are not allowed to use as much memory as required for the export, therefore these two commands are only available as URL commands.

- **exportdatabase:** Exports a single database.
- **exportdatabases:** Exports all databases.

For the `exportdatabase` command you need to provide the following parameter to reference the database that you want to export:

- **uuid:** The UUID of the database to export.

> **Examples:**
> `x-devonthink://exportdatabase?uuid=50EA48F6-D528-4512-B528-B9F24F46185F`

UTILITY URL COMMANDS

DEVONthink To Go has a special group of URLs that are used in troubleshooting situations. These are typically only used when suggested by our support team but they can certainly be run at any time if you encounter the conditions described.

PERFORMING SERVICE TASKS

- **fix-favorites:** Removes all Files app favorites. [Execute]
- **fix-databaseorder:** Resets the database sorting order. [Execute]
- **fix-ocrqueue:** Clears the OCR queue. [Execute]
- **fix-templates:** Re-adds the default templates, e.g., for annotations. [Execute]
- **reindex-metadata:** Marks all items in all databases for metadata reindexing. Use this command, e.g., when searching does not find items by their name, comment, or tags. [Execute]
- **reindex-spotlight:** Clears and rebuilds the Spotlight index in the background. Use this command, e.g., when searching for known item names or content via Spotlight does not produce any results. Please note that Spotlight only indexes the first 16 KB of text per document. [Execute]
- **reindex:** Marks all items in all databases for full reindexing. Use this command, e.g., when searching does not find items by their content. Attention: Some documents that only DEVONthink for Mac can index might not be searchable after reindexing. [Execute]

- **resync:** Deletes the current sync status so that the next synchronization will fully sync everything again. Use this command when the synchronization seems incomplete, missed to apply some changes, etc. [Execute]
- **show-help:** Opens the build-in help. Anchors added after a # hash character can be used to directly jump to a known page (usually provided by our technical support). Alternative syntax `showhelp`. [Execute]

To run a hidden command tap *[Execute]* above or type the complete command URL into Safari's address bar and press the ↩ *Return* key. Usually you'll be advised by DEVONtechnologies' staff to use these commands in a support situation.

CHANGING SETTINGS

There are a few settings in DEVONthink To Go that you cannot change in the *Settings* but only with the *preference* URL command in the following form (example):

```
x-devonthink://preference?
key=DTTGDebugCoreData&value=yes
```

- **DTTGHideFocusFilterBar:** Hides the focus filter bar.
- **DTTGIndexRawMarkdownSource:** Enables or disables indexing of Markdown metadata.
- **DTTGMarkdownUseNewRenderer:** Enables or disables the modern Markdown renderer.
- **DTTGDebugLog:** Enables additional console logging.
- **DTTGDebugCoreData:** Enables additional console logging related to the database core.
- **DTTGDebugCoreDataIntegrityCheck:** Enables a low-level check of the database core on app launch.
- **SyncDebugLog:** Enables additional console logging related to the database core.

> Note: You can use `yes/no`, `on/off`, or `true/false` as parameter values. These hidden settings are not an official feature and could be changed or removed with any update.

SUPPORTED UTIS

DEVONthink To Go uses universal type identifiers (UTIs) to refer to the type of a document, e.g., for choosing which viewer/editor to use, in Shortcuts actions, or when sharing data with other apps. Below you'll find a list of all UTIs currently support by this app. Apple has also more info on the UTI concept in general and on the UTIs supported by the operating system.

```
com.adobe.pdf
com.apple.applescript.script
com.apple.applescript.text
com.apple.coreaudio-format
com.apple.finder.pictclipping
com.apple.finder.textclipping
com.apple.iwork.keynote.key
com.apple.iwork.numbers.numbers
com.apple.iwork.numbers.sffnumbers
com.apple.iwork.pages.pages
com.apple.iwork.pages.sffpages
com.apple.mail.email
com.apple.protected-mpeg-4-audio
com.apple.quicktime-movie
com.apple.rtfd
com.apple.web-internet-location
com.apple.webarchive
com.apple.xml-property-list
com.compuserve.gif
com.devontechnologies.think.feed
com.devontechnologies.think.formattednote
com.devontechnologies.think.group
com.devontechnologies.think.smartgroup
com.microsoft.excel.xls
com.microsoft.powerpoint.ppt
com.microsoft.word.doc
com.microsoft.word.wordml
com.mindnode.mindnode.mindmap
com.topografix.gpx
net.daringfireball.markdown
```

```
org.idpf.epub-container
org.oasis-open.opendocument
org.openxmlformats.presentationml.presentation
org.openxmlformats.presentationml.presentation.macroenabled
org.openxmlformats.spreadsheetml.sheet
org.openxmlformats.spreadsheetml.sheet.macroenabled
org.openxmlformats.wordprocessingml.document
org.openxmlformats.wordprocessingml.document.macroenabled
org.textbundle.compressed
org.textbundle.package
org.webmproject.webp
public.aiff-audio
public.audio
public.avi
public.comma-separated-values-text
public.file-url
public.heic
public.html
public.image
public.jpeg
public.movie
public.mp3
public.mpeg-4
public.mpeg-4-audio
public.plain-text
public.png
public.rtf
public.source-code
public.svg-image
public.tab-separated-values-text
public.tiff
public.url
public.vcard
public.xml
public.zip-archive
```

READ ME

IN THIS CHAPTER

What's New	84
About Us	100
Legal	100
Credits	100

Put your notes, text documents, images, and bookmarks into your pocket with DEVONthink To Go. Have them always at hand even when you are not connected to your office network or the internet.

WHAT'S NEW

New Improved Fixed Removed Known Issues

VERSION 4.2.3

This maintenance release fixes a few issues including a crash on iOS 27.

- On iPhone, selecting a PDF in the search results crashed the app on iOS 27. Fixed.
- Deleted databases could still appear as locations when clipping or sharing to DEVONthink To Go, and show up in the Files app and in Shortcuts, until their removal had finished in the background.
- Indexing could keep coming back to the same items without ever finishing them. Fixed.
- Manually started OCR jobs could get stalled in the *Activity* popover. Fixed.

VERSION 4.2.2

This maintenance release gives the selected item in the sidebar better contrast and no longer shows actions as icons if there's just one action in the row. It also improves sync robustness and fixes a range of issues and crashes.

- Menu icon rows containing only a single action show the action as a regular menu item instead of as a compact icon.
- The selected row in the sidebar uses a darker, more contrasting background color.

- **Sync** — Retrieving databases for sync is slightly more efficient.
- **Sync** — Updating the sync status is more robust.

- The menu and shortcut for switching between rendered and edit mode was missing. Fixed.
- Opening a document from a search that contained no usable search words opened the in-document search with the full query. Fixed.

- Opening the in-document search bar right after a document appeared could crash the app. Fixed.
- The search and replace fields of the in-document search popover did not use Liquid Glass styling. Fixed.
- The in-document search popover could get the wrong height when switching to find-and-replace. It also used wrong background colors. Fixed.
- The item count of selected rows in the sidebar used a wrong text color. Fixed.
- Clearing a document's chat left the document with an empty but still existing chat. Fixed.
- Opening Markdown documents could crash the app. Fixed.
- Resizing the text view by expanding the sidebar crashed the app. Fixed.
- Sending chat enquiries could stall the app. Fixed.
- After installing a new build, the built-to-build migration tasks ran the tasks for the previous build again. Fixed.

VERSION 4.2.1

This maintenance release focuses on stability and performance. Item counting is faster and sync downloads data more quickly by matching the Mac's concurrent connection count. We have also fixed a range of crashes and smaller issues.

- Item counting is faster.
- Resolving item links fails more gracefully if the destination item is not found.
- When following a link in a document to another document, that other document is selected in the item list if it is located in the same group.

- **Sync** — DEVONthink To Go uses the same number of concurrent download connections as DEVONthink for Mac and so downloads data faster.

- *Set Name As* was missing from the text editor context menu. Regression. Fixed.
- The *Format* context menu was available in plain text documents and other document types when not in edit mode. Fixed.
- The *Instances* button in the *Info* popover could flicker. Fixed.
- Entering existing group tags into the *Info* popover, e.g., by choosing them from the suggestions, created ordinary tags instead. Fixed.
- The global *All Inboxes* smart group showed a wrong item count. Fixed.
- Some menu commands ended in ellipses but shouldn't. Fixed.
- The popover presenting major version highlights did not always appear reliably. Fixed.
- The *Contact Us* link in the *About* panel did not use the app tint color. Fixed.
- State restoration into large groups could crash the app on launch. Fixed.
- The names and aliases cache could crash the app. Fixed.

- Rotating the device or resizing the window on iPad so that it changes from multi-column to collapsed column mode, could crash the app. Fixed.
- Dismissing a popover as a direct transition to another popover could crash the app. Fixed.
- Checking the validity of an item link could crash the app. Fixed.
- Handling keyboard shortcuts could crash the app in rare circumstances. Fixed.
- The temporary file "OCRJobQueue.archive" could get imported into the global inbox. Fixed.

- **Sync** — Setting a group to *Download: Always* in the *Info* panel did not immediately attempt to download the contents. Fixed.
- **Sync** — During sync, versions could get deleted despite a setting that says otherwise. Fixed.
- **Sync** — Downloading pending documents from a Bonjour location tried over and over when the location was available but the database wasn't. Fixed.

VERSION 4.2 CHANDRA

This release introduces Zen mode for distraction-free reading and editing, a redesigned icon view, and an updated OCR engine with improved accuracy and language support. Create new images or edit existing pictures with the new AI image creation popover, and add notes or scan documents right from the Control Center.

Quickly navigate your databases with your favorites right on the databases list. Color groups and tags — all synchronized with the Mac — and order documents manually if needed. The chat can highlight text passages and ignores documents from databases you exclude.

> Note: We're naming this release after the Chandra X-ray Observatory, NASA's flagship X-ray telescope launched in 1999 and itself named after the astrophysicist Subrahmanyan Chandrasekhar (1910–1995). Chandrasekhar determined the mass limit above which a white dwarf star cannot support itself against gravitational collapse, laying the groundwork for our understanding of neutron stars and black holes. His work reminds us that perseverance can reveal truths about the universe even long before anyone has the means to observe them.

Zen ModeView and edit documents distraction-free. DEVONthink To Go hides all interface elements and shows them again on tap. Choose how Zen mode activates in Settings.AI Image CreationCreate new images from the Add menu, or edit existing ones. Adjust model, aspect ratio and quality right in the popover.Redesigned Icon ViewEnjoy the redesigned Icon view with three icon sizes and multi-selection support.Updated OCR EngineConvert scans to searchable PDFs with improved accuracy and performance. The updated OCR module adds automatic language detection, engine selection, and parallel page processing.Control WidgetsCreate a new note or scan a document right from the lock screen or Control Center. Both actions are also available as Shortcuts actions.

- You can view and edit documents in distraction-free *Zen mode*. On activation, DEVONthink To Go hides all interface elements, and shows the navigation bars and toolbars again on tapping the navigation bar area. A new preference lets you choose whether you want to activate Zen

mode when tapping the background of a document or only intentionally via the ⊙ *Action* menu. You can also choose a *Zen Mode* button for your documents toolbar.

- Create new images from the *Add > Media* menu or select an image and choose *Via Chat > Edit Image…* from the context menu. You can change all options ad-hoc in the popover, including model, aspect ratio, and quality.
- Set a default font for text, Markdown, rich text, and formatted notes documents. You can also adjust the line height.
- Text-based documents have a character, word, and paragraph count.
- The redesigned grid view, now named *Icon* view, includes support for three different icon sizes and multi-selection.
- A new *Favorites* section on the databases list gives you access to your favored groups and documents. Use the context menu to remove items from the favorites or open groups in icon view (iPhone only).
- You can add smart groups from the database list's ⊙ *Action* menu.
- Groups got a new sorting order: unsorted. Note that due to restrictions in how the database engine handles sorting, replicated items share a single manual sorting order.
- You can give groups and tags a color. You can set the color in the *Info* popover. Colors are synchronized with the Mac.
- Control widgets let you create notes and quickly scan documents. Both can be added to the Control Center or the lock screen. In addition, both actions are also available as Shortcuts actions.
- We've updated the OCR engine to Tesseract 5 with improved accuracy, performance, and support for various languages and scripts. It better recognizes the languages used in a document, selects the OCR engine (Vision or Tesseract) automatically, detects multi-column layouts, and processes pages in parallel.
- Searching now also supports most of the Mac's *contains* set of values for the `item:` key, like `aliased`, `annotated`, `commented`, etc. It does not (yet) support `reminded` and `scripted`.
- You can edit labels in *Settings > Interface & Chat > Labels*, including changing their color. Changes are synchronized as part of the global inbox.
- A new setting lets you choose what to show as database item counts: number of items in the inbox or unread items in the database.
- You can read our regular tips about DEVONthink To Go directly in Settings > Tips.

- Transclusion of sheets into Markdown documents uses a Markdown representation.
- Inline footnotes in Markdown preserve embedded links.
- Anchors in Markdown section headings are compatible with the MultiMarkdown implementation.
- Tables in Markdown can be headerless.
- The Markdown parser better supports styling in image links, including CSS units for scaling.

- DEVONthink To Go renders alt text in an image link as an image caption and supports standard Markdown styling or linking, e.g., `![*Polar Bear*](/Animals/polarbear.png)`.
- All CSS files use `@layer` to clearly separate their rules from manually added ones.
- You can convert Markdown documents to HTML.
- The Markdown parser/renderer is generally more reliable and performant.
- The document title menu has a command for saving a new version.
- You can share web pages opened by following links from a document, open them externally, and activate the new Zen mode.
- When creating a new smart group, the dialog for naming the smart group shows a switch for creating a global smart group also on iPhone.
- Trashes have a view options menu and can be sorted or filtered.
- The option to clear all view filters is now named *Deselect All* and is disabled when no filters are active.
- When pulling down in groups containing feeds, DEVONthink To Go first updates the feeds, then syncs.
- Tapping the *Unread Articles* or *Recent Feeds* widgets opens the last used feed.
- Tapping the *Favorites* widget itself opens the app and shows the database list to give quick access to the favorites. Similarly, tapping the *Recently Viewed* widget opens the app at the root level for quick access to the global smart groups.
- The search predicate editor uses `:` and `:!` for `item:` queries instead of `==` and `!=`.
- The search predicate editor better handles search queries of the form `{any: tags:a;b}`.
- Searching for `item:chat` finds documents with attached chats. This term cannot be used in local smart groups.
- Search accepts the alternative syntax `created:==2026-05-10`.
- Search also accepts the keywords `addition`, `modification`, and `creation`.
- The search button is now located in the navigation bar.
- You can directly open the *About*, *Help*, and *Tips Settings* panels as well as contact us by email from the database list's ⊙ *Action* menu.
- When entering tags, the button for showing suggestions appears immediately and lets you choose from your most recently used tags.
- *Settings > Sync* and *Settings > AI* have buttons that open the corresponding help pages.
- The help front page contains a link to the Handbooks & Extras page where you can download the help as PDF or EPUB.
- The *About panel* shows the major version name.
- Informative notifications no longer appear while you are actively interacting with the app.
- The popover showing the highlights of a new major version uses smaller fonts and has a button for showing the full release notes.
- We have updated many icons in menus all throughout the app and renamed some command titles for consistency.

- The OCR engine recognizes the document layout and characters in some scripts with higher accuracy.
- When adding feed articles, DEVONthink To Go more reliably handles some ISO 8601 date variations.
- When *Verify & Repair* finds documents with missing files, it gives you the option to trash or delete the documents so that they can no longer potentially block the synchronization.
- The log messages for repaired empty files, missing files, and broken documents are more informative.
- When running *Verify & Repair* on a single database, log entries contain the name of the database.
- If the OCR queue becomes unresponsive, you can now clear it with a new URL command `x-devonthink://fix-ocrqueue`.
- Opening the *Reading List* via URL handle is more reliable.
- Updated German localization.
- Checking whether the device is connected to a network is more reliable.
- Many background operations are more efficient and less energy-consuming. Maintenance tasks are scheduled smarter, searches run faster. DEVONthink To Go also checks for the available disk space less often to save battery.

- **Sync** — New sync locations are set to download-always by default.
- **Sync** — Synchronizing feeds uses persistent GUIDs of news to avoid duplicates.
- **Sync** — Synchronizing only keeps the system from switching the display off when the sync was initiated by you.

- **AI** — The chat can highlight text passages in text, Markdown, RTF, formatted note, PDF, and HTML documents.
- **AI** — The chat also redacts IBANs.
- **AI** — The chat displays images returned by Perplexity Sonar models.
- **AI** — You can open a chat with multiple selected documents.
- **AI** — Databases can be excluded from chat. Newly created audit-proof databases are excluded from chat by default.
- **AI** — Chat-based actions like renaming, setting labels or ratings, or tagging also work for bookmarks.
- **AI** — You can set a separate model for tagging in *Settings > AI*.
- **AI** — The *Summarize* popover caches the generated or retrieved text when you switch between summary styles.
- **AI** — The AI search assistant requires fewer tokens and is both more reliable and faster.
- **AI** — Editing images with Flux 2 Pro or Max retains the original image's size, if possible.
- **AI** — DEVONthink To Go uses an improved description of the query syntax for the chat's database search tool, making searching more reliable and precise.

- **AI** — Improved tagging of documents via chat retains the spelling of existing tags if the option *Settings > AI > Use only already existing tags* was enabled but the AI returned, e.g., lowercase or uppercase.
- **AI** — Batch tagging in case of some models, e.g., Magistral, is more reliable.
- **AI** — DEVONthink To Go sanitizes Gemma 4 responses via Ollama.
- **AI** — Ollama can serve as a search engine provider.
- **AI** — You can access the `Chat.log` in *Files > On My Device > DEVONthink*.
- **AI** — Added support for Xiaomi models via OpenRouter.
- **AI** — Added support for GPT 5.5 Pro via OpenAI.
- **AI** — Added support for reasoning effort via LM Studio 0.4.8 or later.
- **AI** — Updated Claude Opus to version 4.8, via Anthropic and OpenRouter.
- **AI** — Updated OpenAI GPT 5 Nano and Mini to version 5.4, all higher models to 5.5. The new models are much more expensive, but the standard model also supports a context window of up to one million tokens.
- **AI** — Updated Mistral Medium to version 3.5 (via Mistral and OpenRouter). The latest version supports reasoning, has a context window of 256k tokens but is 3.75 times more expensive.
- **AI** — Updated Mistral Small to version 4, which has a context window of 256k tokens (instead of 128k) and supports reasoning. Note that the model is now more expensive.
- **AI** — Improved support for OpenAI's GPT-OSS model via LM Studio or Ollama.
- **AI** — Improved support for Qwen 3.x, Gemma 4 and Mistral Small 3/4 (both locally and via OpenRouter).
- **AI** — Improved support for Nvidia's Nemotron 3 models.
- **AI** — Replaced GPT-Image-1.5 with GPT-Image-2. Note that *HD* quality produces larger images.
- **AI** — Updated the Recraft image generation model. Note that it no longer supports styles.
- **AI** — Updated Flux models to Flux 2 Klein/Pro/Max. All models support standard and HD quality and image editing but do not support styles.
- **AI** — Nano Banana 2 uses the commonly available gemini-3.1-flash-image model.

- The Markdown parser incorrectly detected an indented horizontal line with spaced characters, e.g., `* * *`, following a list in Markdown as a heading. Fixed.
- The Markdown parser had an issue with multiple `$` characters followed by digits in a line. Fixed.
- Callouts and blockquotes beginning with lines similar to MultiMarkdown metadata didn't parse and render correctly. Fixed.
- The Markdown parser didn't parse emboldened text following punctuation, e.g., `note:`. Fixed.
- Markdown blockquotes separated by one empty line merged into a single quote. Fixed.
- Markdown in WYSIWYG editing mode rendered with varying line heights. Fixed.
- The Markdown parser didn't allow CSS declarations containing spaces in YAML frontmatter. Fixed.
- Resolving relative paths to, e.g., CSS documents used partial matching. Fixed.

- The Markdown HTML `doctype` language defaulted to English rather than the language of the text within the document. Fixed.
- Some feed articles were rendered too wide on small screens. Fixed.
- PDFs had an additional top inset that left an opaque band in the transparent navigation bar. Fixed.
- In sheets, the languages and countries menu in edit mode didn't work correctly. Fixed.
- When editing a multi-line cell in the sheet editor, you could enter tab characters. Fixed.
- Sheet titles were not saved after changing them in the header cell. Fixed.
- EPUBs did not offer an ⋯ *Action* menu. Fixed.
- The image editing pane had some spacing issues at the bottom. Fixed.
- Some text documents had too much white space above the text when not in edit mode. Fixed.
- New text documents created without using the assistant couldn't be edited immediately after creation. Fixed.
- Ordinary tags couldn't be excluded from tagging. Fixed.
- Moving, replicating, or duplicating items via the context menu of items in icon view didn't show the group selector. Fixed.
- Deleting a global smart group did not automatically deselect it in item lists. Fixed.
- Local smart groups did not have an item count. Regression. Fixed.
- Tapping items on the *Reading List* that linked to a specific page of a document didn't open on that page. Fixed.
- When the device was not connected to a network, DEVONthink To Go unnecessarily disabled the *Activity* button. Fixed.
- Opening, e.g., the *Reading List* via URL handler or widget with the app not yet launched just opened the app and did not navigate to the actual destination. Fixed.
- The icons for the shortcuts in the app icon menu were too large on iPhone. Fixed.
- The negation operator for `item:` queries didn't work. Fixed.
- Custom metadata fields of type *date* appeared in the date section of the advanced search editor but shouldn't. Fixed.
- DEVONthink To Go tried to import PDF attachments that did not resolve to a valid PDF. Fixed.
- Autorotating OCR documents didn't work with large page sizes. Fixed.
- OCR incorrectly autorotated some vector PDFs. Fixed.
- The German localization of the OCR languages wasn't complete and consistent. Fixed.
- Unnecessarily updating internal caches could cause UI delays. Fixed.
- In case of, e.g., a network or backend error, *Settings > License* could show an enormous number of apparently free seats. Fixed.
- Rendering formatted notes without both `<head>` and `<style>` elements crashed the app. Fixed.
- Creating new items, e.g., a new scan, could stall the app. Fixed.
- Editing images could crash the app. Fixed.

- After adding a column to a sheet, the app could crash. Fixed.
- Using the ⇥ key in sheets crashed the app. Fixed.
- Viewing a group with mixed content types could crash the app when a category appeared or disappeared. Fixed.
- Processing downloads, e.g., from the decluttering service, could crash the app. Fixed.
- Many concurrent widget updates could crash the app in the background. Fixed.
- Updating the database list after a change could crash the app in rare circumstances. Fixed.

- **AI** — In the ⊙ *Action* menu, chat-based actions were available even when no AI provider was set up. Fixed.
- **AI** — It wasn't possible to get a summary for a bookmark. Fixed.
- **AI** — In *Settings > AI*, the icons for DEVONthink and Exa in the search provider menu did not render correctly in dark mode. Fixed.
- **AI** — In the *Info* popover, the *Exclude from Chat* switch was not properly disabled if an enclosing group was already excluded from chat. Also, changing a group's or database's *Exclude from Chat* property did not immediately enable or disable the *Chat* toolbar button. Fixed.
- **AI** — The placeholder text in the chat's text field was too long. Fixed.
- **AI** — Letting the chat query the database could stall the app. Fixed.
- **AI** — On rare occasion, web searching with AI could cause a crash in the chat. Fixed.
- **AI** — Empty or broken messages received from AI could crash the *Summary* popover. Fixed.
- **AI** — Editing images with some models could stall or crash the app. Fixed.
- **AI** — Google's Nano Banana 2 and Pro could fail due to being asked for the wrong type of output. Fixed.
- **AI** — Evaluating which items to exclude from chat could crash the app in recursive group structures. Fixed.
- **AI** — DEVONthink To Go endlessly logged models which are not available anymore. Fixed.

- Checking if an item could be moved to another location during a sync could crash the app. Fixed.

- The hard-coded *Favorites* smart group is now obsolete. You can manually recreate it by adding a global smart group with the query `item:favorite`.

- **AI** — Chat-related image generation options from *Settings > AI*.
- **AI** — Obsolete diffusion style support from image generation.
- **AI** — Support for the Google Imagen models (Google will discontinue them soon).
- **AI** — Support for the Flux 1 model.
- **AI** — Support for the GPT 4.1 models from OpenAI and OpenRouter.
- **AI** — Support for the GPT 5 Nano/Mini models from OpenRouter, use the new version 5.4 instead.
- **AI** — Support for GPT O3 and O4 Mini models from OpenAI and OpenRouter.

- **AI** — Support for various GPT 5.1 and GPT 5.2 models via OpenRouter (also in script assistant). Use the latest 5.4 and 5.5 models instead.
- **AI** — Support for Mistral Small 3.2 and GLM 4.7 Flash from OpenRouter. Use Mistral Small 4 and GLM 5 Turbo or GLM 5V Turbo instead.
- **AI** — Support for Mistral Medium 3.1 from OpenRouter as the latest version 3.5 is now available.
- **AI** — Support for Gemma 3, GLM 4.6 and GLM 5 from OpenRouter. Use Gemma 4 or GLM 5.x instead.
- **AI** — Support for Xiaomi MiMo-V2-Flash/Omni/Pro, DeepSeek 3.2 and DeepSeek 3.2 (Speciale) from OpenRouter. Use MiMo-V2.5, MiMo-V2.5 Pro, DeepSeek V4 or DeepSeek V4 Flash instead.
- **AI** — Support for Kimi K2 2.5 and Qwen 3.5 Plus, Qwen 3.5:27b and Qwen 3.5:9b from OpenRouter. Use Kimi K2 2.6 or Qwen 3.7 Plus instead.
- **AI** — Support for all Qwen 3.5 models from OpenRouter. Use the version 3.6 and 3.7 models instead.
- **AI** — Support for Grok 4.20 from OpenRouter. Use the latest version 4.3 instead.

VERSION 4.1.3

This maintenance release gives the integrated help pages a visual overhaul and resolves a number of issues, including a crash in the chat, UI delays, and deadlocks. It also fixes unformatted dates in feed articles and syncing bundle documents.

- The *integrated help* pages got a visual overhaul.

- In *Settings > Help*, help pages appeared partly under the navigation bar. Fixed.
- Some RSS feeds returning dates with time zones showed the raw ISO date in articles. Fixed.
- The chat could crash the app due to a missing file. Regression. Fixed.
- Under certain circumstances, opening a popover could crash the app. Fixed.
- Updating some internal caches could cause UI delays. Fixed.
- Less likely deadlocks caused by concurrent read operations.
- Updating the data store from data received by the Files app could crash the app in the background. Fixed.

- **Sync** — Syncing bundle documents didn't work. Regression. Fixed.

VERSION 4.1.2

This maintenance release adds emergency notification support so we can reach you quickly if a critical fix is held up for some reason. It also fixes a range of issues, including ones related to item counting, wrong RSS article dates, and non-functioning chat exclusion controls.

- We can post emergency notifications if necessary, e.g., when an important bug fix is held up for some reason.

- Markdown with emphasis was rendered with a too large font in WYSIWYG mode. Fixed.
- Feed articles showed a wrong date in their article text. Also, some feed articles showed the raw ISO 8601 date in the article when the provided date contained fractional seconds. Fixed.
- Some feed articles were rendered too wide on small screens. Fixed.
- Rendering formatted notes without both `<head>` and `<style>` elements crashed the app. Fixed.
- On iPhone, the action button of the group selector animated weirdly when navigating into and out of groups. Fixed.
- The item counts of databases counted also versions. Fixed.
- Calculating the item statistics for a database could crash the app in case of items with undefined type. Fixed.
- Searching for `kind:ordinarytag` or its negation crashed the app. Fixed.
- Changing a group's *Exclude from Chat* property did not immediately enable or disable the *Chat* toolbar button. Fixed.
- In the *Info* popover, the *Exclude from Chat* switch was not properly disabled if an enclosing group was already excluded from chat. Fixed.
- Opening a shallowly synced document with the Bonjour destination unreachable showed an endlessly spinning activity indicator. Fixed.
- Updating the sync status while a database was being deleted could crash the app. Fixed.
- Deleting a database could potentially deadlock the app. Fixed.
- Creating thumbnails could potentially cause slowdowns or deadlocks. Fixed.
- Updating widgets could cause a crash when the app was in the background. Fixed.

VERSION 4.1.1

This maintenance release improves database verification and repair. Creating new documents without giving them a title now uses a unified generic name. The update also addresses several issues, including broken sharing to third-party apps and a vanishing sidebar button.

- *Verify & Repair* also repairs items with broken metadata or missing view options.
- Creating documents without titles, e.g., by clipping or pasting, uses a unified generic name.

- Markdown documents with superfluous, unbalanced opening transclusion markers didn't render properly. Fixed.
- HTML entities in the titles of feed articles were not resolved. Fixed.
- When editing a PDF, the button for showing and hiding the sidebar vanished. Fixed.
- After closing the PDF editing toolbar, editing mode did not reliably end. Fixed.

- When importing email attachments, items that did not resolve to a valid PDF could still be imported. Fixed.
- PDF attachments in RTFs could overlay text when zoomed. Fixed.
- Documents created without using the assistant couldn't be edited immediately after creation. Fixed.
- Multiline fields in sheets were not editable. Fixed.
- Sharing groups to, e.g., WhatsApp or Google Drive didn't work. Fixed.
- Opening databases in grid view didn't work at all. Also, the *Open in Grid View* context menu command was available on iPad but shouldn't have been. Fixed.
- The OCR quality slider didn't retain its setting. Fixed.
- The progress bar and the activity indicator of the reload button when loading web pages were awkwardly positioned after the changes for Liquid Glass. Fixed.
- *Go* menu and keyboard shortcuts were not updated after reordering global smart groups. Fixed.
- When opening the *Info* popover for a group from the toolbar button and then scrolling up, buttons loaded with a visible delay. Some also briefly showed 'Button' before updating to their proper title. Fixed.
- The *Download* control for groups flickered when the group was updated while the *Info* popover is visible. Fixed.
- In the overflow menu, the *Activity* toolbar button had no title. Fixed.
- Selecting a document that is currently displayed in the detail view made the title disappear. Fixed.
- *Verify & Repair* always reported repaired favorites when there were favorites set via the Files app. Fixed.
- Custom metadata created via AppleScript on the Mac could have no title. Editing field definitions on iOS could therefore remove these fields. Fixed.
- Checking for groups excluded from tagging could crash the app in case of recursive tag structures. Fixed.
- Converting documents, e.g., from clipped data, could crash the app. Fixed.
- Purging old feed articles could stall the UI for a brief moment. Fixed.
- Clipping documents without giving them a name could crash the extension or application. Fixed.
- Processing downloads, e.g., from the decluttering service, could crash the app. Fixed.
- Monitoring changes by the Files app could crash the app due to a deadlock. Fixed.
- Updating the database list after a change could crash the app in rare circumstances. Fixed.
- Many concurrent widget updates could crash the app in the background. Fixed.

VERSION 4.1 LAGRANGE

DEVONthink To Go now supports RSS feeds including automatic updating in the background. Home screen widgets give you quick access to inbox counts, unread RSS items, top reading list entries, your most-used favorites, and recently viewed documents.

A brand-new Markdown renderer replaces MultiMarkdown 6 and delivers more reliable previews and broader syntax support. DEVONthink To Go also adds support for BibTeX documents, and you can now merge multiple images into a single PDF document.

Other improvements include the option to open certain documents directly in editing mode, an enhanced group selector, and new actions for geolocations in the *Info* popover.

> Note: We're naming this release after the mathematician Joseph-Louis Lagrange (1736–1813) who made significant contributions to the fields of analysis, number theory, and both classical and celestial mechanics. Lagrange's work has had a profound impact on our understanding of celestial mechanics and has practical applications in space exploration.

RSS FeedsRead your favorite news and blogs on the go. Feeds are updated automatically, if desired. Choose your favorite article format.WidgetsGet the number of items in any of your inboxes or unread articles in your RSS feeds at a glance. Access your most used favorites and top reading list items.New Markdown Parser & RendererReplaces MultiMarkdown 6 and combines the most popular features of MultiMarkdown, CommonMark, GitHub Flavored Markdown, and more. It supports all popular features of modern flavors.New SettingsAdjust the sync schedule more granularly. Let DEVONthink To Go open documents automatically in editing mode and disable JavaScript for PDFs if needed.

- Added support for RSS feed updates, including new feed settings. You can add new feeds, choose their preferred article format, and set how often DEVONthink To Go should update them. Feed updates also happen in the background. You can find all feed-related settings in *Settings > Feeds*.
- Added home screen widgets. They show item counts for any inbox, unread feed articles, top *Reading List* items, the four most used *Favorites*, and the four most recently viewed documents.
- DEVONthink To Go uses a new and more reliable custom Markdown renderer that replaces MultiMarkdown 6. It combines the most popular features of e.g. MultiMarkdown, CommonMark, and GitHub Flavored Markdown, like callouts, nested task lists, definition lists, tables with captions, Display Math, inline footnotes, abbreviations, citations, smart quotes, and improved CriticMarkup support. The new parser is also more compatible to AI output, e.g. math. It is enabled by default but you can disable it using a hidden preference.
- In the *Info* popover, geolocation details now have an *Action* menu. Use it to open the location in Apple Maps or Google Maps, update the geolocation to the current location, or open an editor to set the geolocation manually.

- You can open text-based documents and PDFs directly into editing mode. New options for text, PDF, and Markdown documents are available in the *Settings* and in the document options menu.
- For documents with a web URL in their metadata, the *Action* menu offers a command to open the URL externally.
- You can disable JavaScript in *Settings > PDF*.
- Added support for merging multiple images into a PDF document, including TIFFs.
- The *Clip to DEVONthink* destination selector also lists the favorite groups.
- Added support for BibTeX documents. DEVONthink To Go displays them as sheets, like on the Mac.
- A new popover shows the main new features of major new versions.

- **AI** — Set your preferred search engine for web and Wikipedia searches in *Settings > AI*.
- **AI** — Change the search options, usage mode, and content mode directly in the chat's *Action* menu.

- The group selector is more efficient to use and has a search field. With a hardware keyboard attached, it supports keyboard navigation. ⌘F also activates the search field, ⌘↩ executes the selected action.
- The *Activity* toolbar button now shows a triangle when log entries are present. Tapping it always opens the *Activity* popover. A new button in the popover opens *Settings > Log*.
- When clipping bookmarks in *Clip to DEVONthink*, the last active field is now used as the initial field.
- You can open links in *HTML documents* externally via their context menu.
- Improved text previews in the *item list*.
- All groups that are filtered by unread appear dimmed in item lists.
- Documents with chats now show a chat icon in item lists. Items with comments show a comment icon.
- You can exclude groups and feeds from search.
- RSS articles in HTML format now use better styling.
- When adding a new version manually, you can name it. You can also rename versions via the *Info* popover.
- The *Info* popover's *Versions* pane now uses the same date formats as DEVONthink on the Mac. Manually created versions use the same formats.
- The *Original Name* field in the *Info* popover shows two dashes if the name was never changed and disables its action menu.
- The icons in the *Settings* appear in Liquid Glass design in dark mode.
- On iPad, the *Settings* popover is dynamically adjusted to the actual screen size.
- Opening files from, e.g., the *Files* app imports them and also opens them for viewing.

- DEVONthink To Go identifies itself now as "DEVONthink" (without version number) for, e.g., nicer notifications.
- The release notes no longer open automatically for maintenance releases but simply add an entry to the *Log*.
- Reduced the number of notifications.
- Improved overall performance and reliability.

- **Sync** — In the *Settings*, the same values for the sync schedule are available as on the Mac. For simplicity, DEVONthink To Go previously only offered *Manually* and *Automatically* as choices.
- **Sync** — In the *Settings*, the last sync date also uses 'yesterday'.

- **AI** — The *Chat* assistant shows images returned by Perplexity Sonar models.
- **AI** — Added support for Xiaomi models via OpenRouter.
- **AI** — Updated GPT 5 Mini and Nano to version 5.4. Note: The new models can be up to four times more expensive.
- **AI** — Updated Mistral Small to version 4.
- **AI** — The *Summarize* popover strips email addresses before sending them to the AI model.

- Converting a Markdown document with images to a paginated PDF failed to include images. Fixed.
- Feed articles in web archive format showed an error message. Fixed.
- In dark mode, web pages viewed internally showed a white toolbar. Fixed.
- Locking PDFs didn't prevent editing. Fixed.
- After dismissing the PDF editing toolbar, in some occasions tapping the *Edit* button didn't bring it up again. Fixed.
- When selected, a group's or feed's item count was barely visible in dark mode. Fixed.
- When swipe-editing an item, the list was unnecessarily put into editing mode temporarily. Fixed.
- With view options set to show text previews, groups showed "--" as details for a brief moment before updating themselves. Also, smart groups and other document formats without text previews briefly showed a placeholder. Fixed.
- When marking an item read or unread, its title was only updated after a delay and not always reliably. Fixed.
- The height of the property icons row for documents in the item list wasn't always updated correctly. Fixed.
- Restoring the last state could show empty item lists if the to-be-restored groups no longer existed or the restore data was invalid. Fixed.
- Grouping groups or feeds opened the resulting group in grid view. Fixed.
- In certain search queries, secondary properties were not evaluated. Fixed.

- The *Info* and *Summary* toolbar items were enabled for document-less web pages, e.g., opened by tapping links in another document. Fixed.
- It was possible to rename non-user-created versions but that change wouldn't have any effect. Also, it was possible to try to add versions for groups. Fixed.
- In the *Info* popover, the *Instances* row's button showed the title 'Button' for a brief moment. Fixed.
- Scrolling the *Info* popover all the way down and bouncing it caused the *Original Name* row to reload visibly. Fixed.
- The *Settings* > *Backup* icon had the wrong color. Fixed.
- The *Settings* > *Data* header had a wrong padding. Fixed.
- In *Settings* > *Sync* > *Locations*, the text for rows for new locations was not correctly centered vertically. Fixed.
- When an activity in the *Activity* popover started without details, it never showed details later on. Fixed.
- The *Cancel* button of activities in the *Activity* pane wasn't Apple-Pencil-aware. Fixed.
- Changing what to show as app badge didn't update the badge immediately. Fixed.
- Item counting was sometimes not reenabled after returning from the background. Fixed.
- Item count prioritization could lead to counting getting stalled until, e.g., a completed sync restarted them. Fixed.
- The *Clip to DEVONthink* extension could crash on opening when the data store was not immediately available. Fixed.
- Converting a formatted note with images to Markdown could crash the app. Fixed.
- Looking up associated documents such as linked images or transcluded documents could stall the detail view. Fixed.
- Mass updates caused interface stalls on iPad due to unnecessary checks. Fixed.
- Mass updates with many changes to an item list could crash the app. Fixed.
- Item counting could crash the app. Fixed.
- Deleting sync data from the previous app generation could take a moment, potentially long enough that the app was terminated on launch by the system. Fixed.
- Initializing placeholders could crash the app. Fixed.

- **AI** — The chat didn't reload if necessary after switching away from the app and returning. Also, after closing the popover with a request running and returning, the request was resent multiple times. Fixed.
- **AI** — The AI cost details in *Settings* > *AI* did not update when changing the AI provider or model. Fixed.
- **AI** — An empty chat response for the summary popover could crash the app. Fixed.

- **Sync** — Databases with no items in their inbox showed no indicator for unsynced changes in the database list. Fixed.

- **Sync** — HTML documents were synced as formatted notes. Fixed.
- **Sync** — When editing a sync location and scrolling fields out of sight, the entered data could get lost. Fixed.

- **AI** — Removed GPT 5 Nano and Mini from OpenRouter; use GPT 5.4 instead.
- **AI** — Removed GPT 4.1 models from OpenAI and OpenRouter.
- **AI** — Removed Mistral Small 3.2 and GLM 4.7 Flash from OpenRouter.

OLDER VERSIONS

Older release notes removed for legibility.

ABOUT US

In the 21st century people are drowning in information. Email, instant messaging, news feeds, and of course the web. A small group of developers has taken up the fight: us.

We are developing apps that tame the information flood. We all are Mac users by heart and are writing solely on the Mac and for macOS and iOS.

Visit our website to learn more about us and our products.

LEGAL

Please read our license agreement and privacy policy using the following links:

- End User License Agreement
- Our Privacy Policy

CREDITS

cCSVParse: © Michael Stapelberg and contributors. michael.stapelberg.de

FMDB: © Flying Meat Inc. github.com/ccgus/fmdb

icons8.com: Icons used under the Creative Commons Attribution-NoDerivs 3.0 Unported license from icons8.com.

KissXML: © Robbie Hanson github.com/robbiehanson/KissXML

MDSpreadView: © Mochi Development, Inc. mochidevelopment.com

PSPDFKit: © Nutrient nutrient.io

ZipZap: © Pixelglow Software github.com/pixelglow/ZipZap

OTHER PRODUCTS

IN THIS CHAPTER

Overview	101
DEVONthink	101
DEVONthink To Go	101
DEVONagent	102
DEVONsphere	102
Needful Things	102

Besides DEVONthink To Go, DEVONtechnologies publishes a number of other commercial, shareware, and freeware applications and services that might be helpful for you.

OVERVIEW

DEVONtechnologies is focused on developing innovative applications for finding, storing, and organizing information. We make the latest, complex technologies easy to use, and fast.

- DEVONthink
- DEVONthink To Go
- DEVONagent
- DEVONsphere

We also publish some freeware apps and services.

NEWSLETTER & COMMUNITY

Would you like us to keep you informed about updates and new product releases? Visit our blog and subscribe to our free newsletter.

If you have a moment feel free to visit our lively user community. Here, users of all skill levels meet to discuss our applications, talk about our technology, and exchange tips and tricks for DEVONthink To Go & Co.

DEVONTHINK

Built on core concepts: capture, organize, search and utilize, DEVONthink is your document and information management solution. Efficiently, capture and organize your documents. Find your documents with lightning-fast searches and share those documents to other apps. And use it's built-in AI or access external AI to make connections and queries about your documents. For any project or topic, large or small, DEVONthink can be the center of it all.

- Learn more about DEVONthink
- Check your upgrade options if you want to upgrade to a higher edition

DEVONTHINK TO GO

Carry a library of your documents in the palm of your hand with DEVONthink To Go. Make databases for any need, filling and organizing them for quick access and searches. Create, edit, and annotate documents wherever you are. Use access to external AI to ask questions and gain insight into your documents. And keep your databases in sync with other mobile devices or DEVONthink on your Mac.

Learn more about DEVONthink To Go.

DEVONAGENT

Your Internet search assistant, DEVONagent Pro is a professional-grade, web-focused search application. Choose where to search, even multiple sites at once, and let it search and filter the results, returning the most relevant matches. Create search sets that will run on a schedule, delivering its findings via email, directly to DEVONthink, or archive them for later. Its related utilities, DEVONagent Express and Lite, run as menubar application for quick and simpler web searches.

Learn more about DEVONagent Pro.

DEVONSPHERE

Our answer to Spotlight, DEVONsphere Express is your Mac-based search utility. Using a simple but powerful search syntax, locate documents in the locations you choose, even ones in your DEVONthink databases. Also, its unique See Also function detects what's in your frontmost application and tries to find related items for you.

Learn more about DEVONsphere Express.

NEEDFUL THINGS

Search files on your hard disk, watch web cams, create thumbnails, or access all your files and apps from the menu bar. Reformat paragraphs in your favorite word processor or do little calculations anywhere you can type in text. Your network connection lets you down or you want to know if a remote server is still alive or already swimming belly-up? All for free.

Learn more about our freeware apps and services.