DEVONthink

VERSION 4.4.1

DOCUMENTATION

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GETTING STARTED

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

This manual is meant as a handy reference, not as a series of mandates on how you must use it. DEVONthink can be used very simply or in very complex ways and each person brings their own personal approach to using it. With the flexibility and capabilities built-in, the possibilities are seemingly limitless. To that end, it's impossible for this guide to be exhaustive. But we strive to provide a guidebook of the core concepts, philosophy, and the controls of this application.

Conventions: To reduce redundancy and assist in connecting sections in this manual, we make use of links throughout the content. These links will help direct you from concept to concept, introduction to description, from general to specifics. As you read, you should notice certain typographical conventions.

- **Interface Links:** Shown in blue italic text, these links point you to sections in the manual describing specific parts of the interface you'd interact with, e.g., the menu command *DEVONthink > About DEVONthink*.
- **Interface Elements:** Shown in black italic text, these are also parts of the interface. But as there are often several references to the same elements in a section, for example, the *Global Inbox*, generally the first instance uses an interface link while subsequent mentions display as an interface element.
- **Document Links:** Displayed in blue non-italic text, these are links to parts of the documentation covering more conceptual things. For example, automation is not something you click on in the interface but is a topic covered in its own section in the documentation.
- **User Input and Paths:** To set apart user input or choices, they are presented in a lighter monospaced font. You will see this for script commands (`get chat response for message`), examples of search syntax (`kind:any text:taxes`), smart actions chosen (`Scan Text`), Markdown syntax (`!`

`[](img/turtle.jpg)`), etc. We also use this convention for file paths, e.g., the default directory for your databases is `~/Databases`.

Pro+ Features: There are some features only available in the Pro and Server editions of DEVONthink. The text for these features will appear in blue in the downloadable PDF or EPUB documents. In the built-in *Help* viewer, those selections are marked in blue with a *Pro* or *Server* badge.

Style: Lastly, to aid in readability we try to use less formal language for some interface items. For example, we will use a shorted form like "the *Tags* inspector" versus "the *Tools* > *Inspectors* > *AI* > *Tags* inspector", when possible. However, for certain items like multi-tabbed settings, we will typically include the parent setting's name, e.g., " the *General* > *Appearance* settings" as the specific setting isn't immediately visible when opening DEVONthink's settings.

We hope our efforts in providing solid information and our mindfulness in trying to avoid information and link overload makes this an approachable, and possibly even enjoyable, resource for you.

Warmest Regards, The DEVONtechnologies Team

Now let's get into it…

FIRST AND LAST STEPS

INSTALLING

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

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

> Note: DEVONthink should be installed in the */Applications* directory to properly work with macOS Services and DEVONagent. Also, while a logout/login or a restart isn't required, it is recommended.

MACOS PRIVACY OPTIONS

With continued changes in Apple's security policies, you are now required to explicitly grant permissions for many actions your applications perform. Regarding DEVONthink, here are options you always should allow in macOS' *System Settings* > *Privacy & Security*, noting these allowances already had been granted for years preceding Apple's changes:

- **Full Disk Access:** Provides access to the filesystem, including your Desktop, Documents, Downloads, mounted volumes, items in your user Library, as well as Safari bookmarks and history.
- **Automation:** Several features in DEVONthink interact with other applications, including the Finder. Press `Allow` when prompted "DEVONthink want to control application X"

- **Local Network:** Starting with macOS Sequoia, you need to give DEVONthink access to devices on your local network, e.g., a multifunction scanner/printer. This is also required for syncing to devices on your network, e.g., via Bonjour or local WebDAV services.
- **Contacts:** Provides access to your Contacts, used when importing contacts or handling emails.

Some of the features of the *Sorter* require specific permissions. Enable DEVONthink for these settings:

- **Device Control and Data Access:** To use the *Copy Selection* function. In macOS 26 Tahoe and earlier, this is called "Accessibility".
- **Screen & System Audio Recording:** To use the *Screen Capture* function.
- **Camera:** To use the *Video Note* function.
- **Microphone:** To use the *Audio Note* function.

LICENSING

Now that you've got DEVONthink installed and given it permissions, you want to activate your license on this Mac. A purchase or upgrade comes with two seats so you can install on two Macs, say a desktop and a laptop. Do this on each Mac for which you want to use a seat….

- **Step 1:** Log into your DEVONtechnologies customer account online.
- **Step 2:** Click the edition you purchased in the "Your Licenses" section.
- **Step 3:** At the top of the page, click the "Activate" button. Okay opening DEVONthink, if prompted by your browser.
- **Step 4:** In DEVONthink's *License* dialog, which should be populated with your information, press the *Register* button and you should be ready to go!

UPDATING

Updates to DEVONthink are done per the schedule set in *Settings > General > General > Check for Updates*. If you'd like to check manually, choose *DEVONthink > Check For Updates*.

> Note: When checking for updates no information is uploaded from your computer to the DEVONtechnologies server. DEVONthink only downloads a file containing a list of the current versions to compare with your installed version.

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

UNINSTALLING

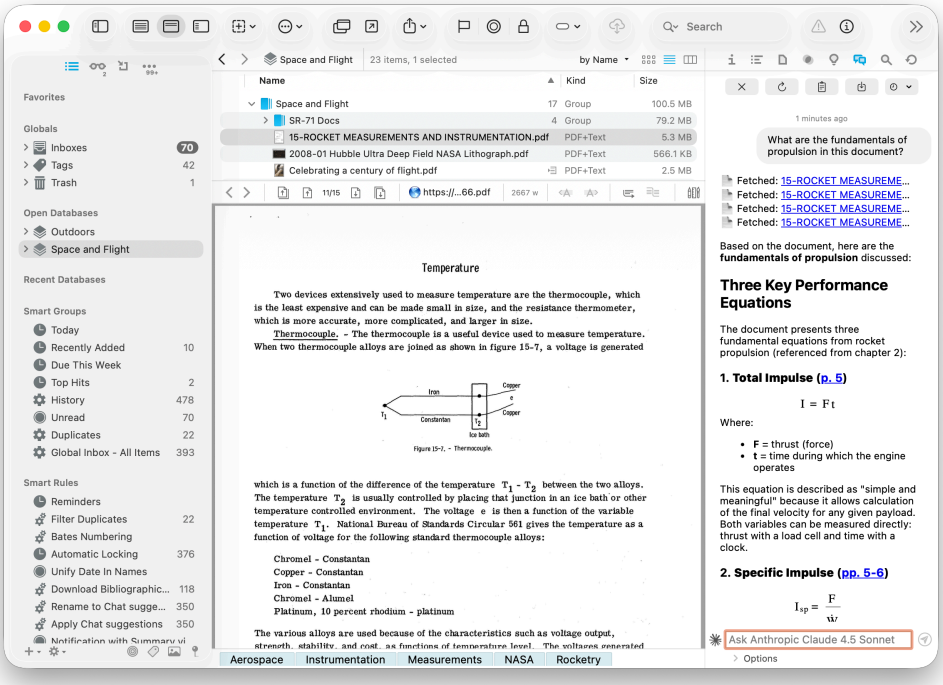
If for some reason you need to fully uninstall DEVONthink from your Mac, trash the following files and folders (~ stands for your account's home folder):

- The DEVONthink application
- `~/Library/Application Support/DEVONthink`

- `~/Library/Application Scripts/com.devon-technologies.think`
- `~/Library/Preferences/com.devon-technologies.think.*`
- All DEVONthink-specific scripts in `~/Library/Scripts`
- All DEVONthink-specific workflows in `~/Library/Workflows/`
- All DEVONthink-specific scripts in `~/Library/PDF Services/`
- Excluding Safari, uninstall the DEVONthink browser extension, following the uninstallation process for the particular browser.
- Bookmarklets from your web browser
- The alias to the Global Inbox folder in the Finder's sidebar
- Keychain entries containing `devoncloudy` in the name

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

DEVONTHINK SIMPLIFIED



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

INTERFACE

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

Similar to the Finder, DEVONthink supports different ways of viewing your items, e.g., in lists or as icons, navigating and viewing details about your documents, etc. Unlike the Finder, you can also import new content in a variety of ways, annotate documents, process documents from email to invoices, run (and create) automations, and much more, all within one application. As we move through this manual, we'll cover more specifics about the interface, e.g, types of windows and what the inspectors are for.

DEVONthink also has a powerful suite of tools found in its menus. Many of these are also found in the context menus when Control-clicking items. And to fine-tune your experience, it also has extensive settings.

DATABASES

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

> Note: Throughout the documentation, we use *item* to represent both groups and documents. Things that only apply to one or the other will use the appropriate term. We also distinguish between *groups* in DEVONthink and "folders" in the Finder. This importance of this distinction becomes more evident in the In & Out chapter.

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

When you create a database, it is made as a self-contained package in the Finder. (Package files are technically folders that are handled like single files by the Finder.) This makes your database a simple, portable unit that can be backed up or transferred as a singular file.

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

In a similar fashion, open databases appear in DEVONthink's sidebar and behave in much the same way.

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

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

The *Global Inbox* is also special as it is the only database you can add a shortcut to in the Finder's sidebar. This allows you to save a file into the *Global Inbox* from other applications, even adding items to it while DEVONthink isn't running.

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

GROUPS

One of the two basic items are groups. No different than the folders and groups found in many other applications, they merely

serve as ways to keep certain bits of data together. But within the DEVONthink groups are a few variations. They are all simple to recognize and understand, but they bear being introduced individually.

Ordinary Groups: Displayed as , these are analogous to folders in the Finder. Except for underlying technology, groups operate in the same fashion. Groups are the simplest way to segregate data. Creating, adding and removing contents, and deleting are all essentially the same. DEVONthink allows you to create deeply nested hierarchies or simple shallow groups, whatever you need to keep things organized in a way that makes sense to you.

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

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

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

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

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

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

tagged with "taxes". You could then create another smart group with items tagged with "taxes","business", and "2018".

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

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

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

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

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

DOCUMENTS

The second basic item in DEVONthink are documents. No different than the Finder, documents are any files you add or create in your databases. Perhaps you are importing spreadsheets for work, or PDFs for your thesis. Maybe some photos from your vacation you want to link to in a Markdown document you're working on. They're all just documents.

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

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

Duplicates: Displayed with ⧉ to the right of a document's name or the name optionally shown in blue type, there are two ways to get a duplicate in your database. Firstly, just as you'd expect in the Finder, select a file and press ⌘D: a duplicate is made. Secondly, if DEVONthink examines the contents and determines it has another file with the same content, it will mark them as duplicates. Making changes to the content of one will usually remove its duplicate status. But if documents have sufficiently similar content, they will be marked as duplicates of each other. For example, if you have pay stubs in a database and the only changing content is the date, the content is essentially "the same". The more text in the document that's the same, the more likely it will be detected as a duplicate. Five words in a document with 100 words is a large proportion of the text.

Five words out of 10,000 words is a much smaller proportion and likely to be considered a duplicate. If you want only exact duplicates to be marked, enable the *Files > General > Stricter recognition of duplicates* setting.

Replicants: Displayed with to the right of a document's name or the name optionally shown in red type, replicants are conceptually similar to aliases in the Finder. Replicants are one file showing up in more than one location, called instances. However, they consume no more space than a single file. Since they are clones, changes made to any instance of a document apply to all instances. This makes them useful when you want to file a document in more than one location, but don't want to have to update each document individually. It can also be useful if you have larger files you want filed in more than one group. A 10 MB PDF, replicated in ten different groups, would only use 10 MB of space in the database.

It's even possible to have a document that is both replicated and a duplicate. This will display this icon to the right of the name:

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

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

THE DETAILS

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

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

BUILDING YOUR DATABASE

Now that we've discussed the philosophy and core elements of DEVONthink, let's discuss actually making one.

CHOOSING THE TYPE OF DATABASE

As you've read, a database is the core element you work with in DEVONthink — the place where you store, organize, find, and access your documents. But not every database has the same purpose or requires the same level of privacy and control. So DEVONthink offers several types of databases from which to choose.

Database (unencrypted): The most commonly used type, an unencrypted database is used for any purpose, from personal to professional. Easily created and able to grow as large as needed (and your

internal disk space allows), these are the core type used by many people. The file extension in the Finder is `.dtBase2`.

Encrypted Databases: If you have databases containing sensitive or private information you want to lock away when not in use, create an encrypted database. This is specialized AES-256 encrypted disk image with a file extension of `.dtSparse` when closed. The mounted disk will not appear in the Finder's sidebar or on your desktop when it's open. To further enhance security, quitting DEVONthink or closing the database unmounts the disk, again locking its contents away. This means you are always required to enter the password to access it. To help visually identify it, an encrypted database will display a key property icon to the right of the database's name in the *Navigate* sidebar.

Revision-Proof Database: If you have mandatory requirements to store documents that can't be edited, e.g., for tax or legal reasons, an revision-proof database fulfills this goal. Revision-proof databases are archival and intended to be compliant with legal or financial standards. They are not working databases, but ones in which you store and "lock away" important documents. As such, they are inherently very limited in what you can do with them.

You can create groups or smart groups and you can import documents to the database. For long-term storage compliance, you can convert PDFs to PDF/A before you add them to your database. Once you add a document to the database, it is read-only and cannot be edited. The limitations also prohibits using actions like services or adding files via automation to add files. OCR and imprinting documents is also prohibited. If you open a document in an external application and attempt to edit it, you will be warned it's locked. If you make a change, it will not persist. Your only option is to duplicate and save a new version outside the database.

Every item added to the database is stored in an uneditable internal log with the metadata like the name, content hash, and filesystem dates. If you rename a document, the original name is still preserved. Dates cannot be changed. And even if you delete a document, the deletion is also recorded. All these interactions can be audited for selected documents or you can export an audit report for the whole database.

An revision-proof database can be synced like any other database. However, it can only be imported to another Mac as an revision-proof database.

As preserving the security and integrity of the documents is paramount, there are also filesystem safeguards in place. For example, the *Path* in the Generic inspector does not display the document's file path, nor can you reveal the file in the Finder or copy its path. If you attempt to rename the database file in the Finder, it cannot be opened. And any attempt to modify the internals of an open revision-proof database will result in irreparable damage to it.

These databases are clearly not for casual use and should be utilized when your situation requires it.

> Note: Revision-proof databases are completely incompatible with DEVONthink 3.x.

Technically similar to encrypted databases and mounted in a protected disk image, the file extension when closed is `.dtArchive`. In the Navigate sidebar, each revision-proof database has a icon to the right of its name.

When you create an encrypted or revision-proof database, you need to provide a few extra pieces of information:

- **Encryption key:** Enter an encryption key that locks the database when it's closed. Bear in mind, you must remember or take note of this key. It is not stored in any accessible location. And it cannot be changed. So if you forget it, your data will be forever locked out of your hands.
- **Size:** Since these databases are contained in secure disk images, you must specify the anticipated maximum size, in megabytes or gigabytes, it will grow to. We recommend you determine a maximum size and add 20 to 30 percent to it. This allows for unanticipated future growth.

Spotlight Indexing: For all types of databases, you have the option to let Spotlight index its contents. However, the Spotlight index is stored locally and isn't encrypted so Spotlight is typically disabled for encrypted databases. Otherwise, someone potentially could see a document exists via a Spotlight search. However, they wouldn't be able to open and access the database without the proper key. Spotlight indexing can be enabled and disabled per-database in the *Database Properties*.

Tech Note: In macOS Tahoe and later, encrypted and revision-proof databases are housed in APFS formatted disk images. These newer encrypted databases cannot be opened in earlier versions of macOS. As a workaround, on an old machine you can use *Import Encrypted Database* in the Action menu of the *Sync* settings to create a OS-compatible version. The older format, HFS+, still works on the modern operating systems. However its use in an encrypted form on newer versions of macOS will likely be ending soon.

DATABASE LOCATION

Ideally, databases are stored in the `Databases` folder in your home directory, as that folder is: quickly accessible, not synced via iCloud, and generally part of a standard backup. Alternatively, you can store it on a connected external hard drive, if your internal drive space is low. You can put the database on an NAS but we only recommend this if you're on a hardwired gigabit Ethernet connection or better. That being said, you cannot create or store a database in a cloud-synced folder, e.g., iCloud Drive or Dropbox. This is not data-safe so the behavior is explicitly disallowed. If you try to open a database in one of these locations, you will be prompted to let DEVONthink move the database, or reveal it so you can manually relocate it.

You may think it is a clever idea to store your databases on an SD card; a portable database on hyper-portable media. However, this is not a good idea as this type of media are not robust or made for long-term storage. (Consider how quickly pro photographers

offload their SD cards to other drives.) We would caution you about thumb drives as well.

Once you've determined what type of database you need, select *File > New Database* and select the type. Give your database an easily recognizable name, set any type-specific options as mentioned above, then choose where you want to save it.

ADDING YOUR FILES

Adding items to a database is often a simple matter of dragging and dropping files into your database. And we've covered many other options in the important In & Out chapter. But the question is: What should I put in it, everything or…?

While you may be tempted to dump every file on your hard drive into DEVONthink and sort it out later, you're best off being more selective in what you add (especially in the beginning). Consider this: On your Mac are hundreds of thousands of files, including in your User Library. Many of those files are never seen or accessed by you. Putting your entire user account in a database only adds an incredible amount of useless data. And weeding these unwanted files out after-the-fact is both time-consuming and frustrating. DEVONthink is not a Finder nor a Spotlight replacement and having a database filled with 90% useless documents is no practical benefit to you. Also remember, DEVONthink has to index the metadata and contents of any compatible files. Indexing unnecessary files bloats the index of a database and leads to imprecise search results and false positives.

However, if you are working in your Documents folder, that would be more useful to add. Or if you are working on separate topics in that folder, perhaps storing your dissertation files in one folder and bookmarks and PDFs about kayaking in another, you could add each folder individually, or even to its own database.

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

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

Database Size: When it comes to database size, there are many variables that can limit the size or performance. Obviously, you need available disk space to grow the database. And you should always keep at least double the space free in case you require virtual memory or maintenance. But the file size of a database is not the critical factor; it's the number of words and amount of RAM available to DEVONthink. The reason is this: When you open a DEVONthink database, the index is loaded into memory. This makes search and classification lightning-fast! But the more words in your database, the larger the index. The larger the index, the more RAM is required to avoid using the hard drive as virtual memory. Look at the number of unique and total words for a database in the *Database Properties* window and use these soft-limits as a guideline:

- **Total Words:** 400 million total words
- **Unique Words:** 4 million unique words
- **Total Items:** 250,000 items

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

You should also have as much RAM as possible. In fact, this should be a deciding factor when purchasing a Mac: the more RAM, the better. Choosing a machine with 8GB RAM may be functional but can also be less performant as your databases grow. With more powerful machines having much more RAM, the stated figures can be exceeded. However, staying within these limits helps keep things running smoothly.

ORGANIZING

Database organization depends on the parties involved. For collaborative work, you'll want to organize it in a manner that's agreed upon by all parties using it. This is especially important since our sync technology is a mirroring sync, meaning changes to one copy of the database gets synced to the other copies. If one person decides to reorganize things, it affects everyone. For personal work, just set up your database in a manner that makes sense to you. There is no right or wrong way to organize it. This is something you've likely already been doing in the Finder, making folders and filing things in them. Apply the same personal choices to DEVONthink.

You will likely see various organizational methods proclaimed as "this most effective". DEVONthink isn't built to accommodate any of them. Its flexibility just allows people to adapt these methods in their databases. Feel free to explore these options if you'd like, but the best method is the one that makes sense and is efficient and effective for YOU.

CASE STUDY: BILL'S DATABASE FARM

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

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

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

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

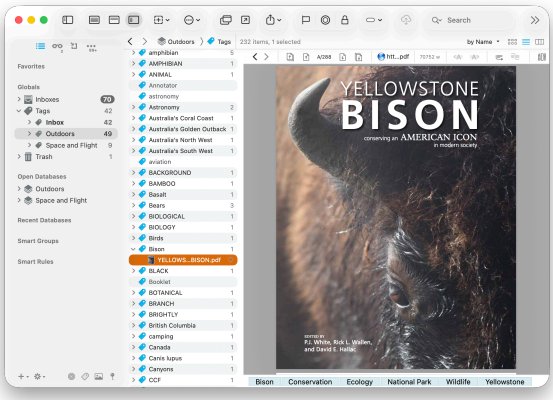
If you'd like to follow Bill's method, start by creating a database with some collections of files that interest you, but don't be afraid to create other databases that contain "different" material as your interests, and main your database, grow. And if you need to search across databases, simply open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

Remember that creating databases isn't an immutable commitment. Create and destroy them as you see fit. Start with one way of organization, see how it works for you, and decide later to re-organize, if needed. You can keep multiple databases open simultaneously, easily moving documents from one database to the other at any time. As you work with your databases, new ideas may spark new approaches which can easily be tried and adopted or discarded. Remember this: The best organization method for your databases is the one that makes sense to and is effective for YOU.

TAGGING

Tagging is a common method of creating context relationships between documents. For example, you can apply a "hobby" tag

to a woodworking article and a sewing machine PDF manual. You would then find both documents when searching for the "hobby" tag. Used in the Finder and many other applications, DEVONthink also supports tagging in your databases (including optionally preserving Finder tags on imported and indexed items). Tags are either ordinary tags or group tags, each discussed below.



ORDINARY TAGS

Similar to tagging methods used in other applications, ordinary tags are added to items by you. Each database has its own *Tags* group and is accessed in the item list or the Tags section of the Navigate sidebar. The item count of a tag shows how many items it has been applied to. If there are unread items in a tag, the tag's name will appear in bold type. If there is a mixture of read and unread items, the count in the item list will be displayed as "unread items/total items".

Creating tags: When you add a new tag to an item, a tag group is automatically created in the *Tags* group for the database you're working in. However, you can also create tags to be used later. Create them in the database's *Tags* using the *Data > New > Tag* command or the *New > Tag* command in the context menu or *New* toolbar button.

Applying tags: When you apply a tag to an item, a reference to that item is created in the appropriate tag group. You will have an item reference in each tag you apply to it. So if you add three tags to a document, you will see a reference to the document in each of the three tags.

Ordinary tags are most commonly manually applied by these methods:

- Type tags into the Tag bar under a document's *view/edit* pane.
- Type tags into the *Tags* section of the *Info* inspector or the *Info* popover for a document.
- Add tags via the commands in the *Data > Tags* submenu.
- Add tags via the *AI > Tags* inspector by double-clicking suggested tags, related tags in the Tags graph, or manually entering them.
- Drag items in your database to the desired tag in the *Tags* section. Be aware dragging an item to a tag in another database will move it to the receiving database.

You can tag multiple selected items via the *Info* inspector, *Info* popover, or the *Tag* bar.

> Note: While importing directly into a tag, e.g., via drag and drop, is supported, it is not generally recommended. If you do this, an item reference is made in the tag but the original item will be located in the Inbox of the receiving database. Importing then tagging is suggested.

Modifying and Merging Tags: You can rename an existing tag in the *Tags* of a database as simply as renaming any other item. The change will instantly apply to all the items using that tag. If you have similar tags but would like to consolidate them into one, e.g., having tags of `apple` and `Apple`, select them in the *Tags* group, then choose *Tools > Merge n Tags*. The tags and their item references will be merged into one tag, preserving the topmost tag's name. Again this change is applied immediately.

A tag can be dragged and dropped into another tag to create parent/child tags. But please read and understand the *Nested Tags* subsection below before proceeding.

Deleting Tags and Tag Groups: Deleting individual tags from items is done via the same methods you apply them, e.g., in the Generic Info inspector. Deleting tag groups is done in the *Tags* group of the database. Simply select the unwanted tag and choose *Data > Move to Trash*. This immediately removes the tag from all them items it was applied to. And only the item references are moved to the Trash, not the original items in the database.

Applying, modifying, or removing tags can also be done by more automated means, e.g., scripting, smart rules, and batch processing. see the Automation chapter for more information.

FINDER TAGS

Finder Tags: DEVONthink supports reading and writing macOS' Finder tags. If tags are present on an imported or indexed files, they will be preserved in the database. When tagging imported files, tags are not written to the filesystem. Instead the tags are recorded in the Spotlight metadata when the *Create Spotlight Index* option is enabled in *Database Properties* popover. This allows searching for tags in Spotlight using the `tags:myTag` syntax. If you export or drag and drop files to the Finder, macOS tags will be written to the exported file. When tagging indexed files, the tags are immediately written in the filesystem and searchable, just as they would be if you tagged them directly in the Finder.

You can change whether Finder tags should be imported or exported in the *Files > Tags* settings. Bear in mind these options are global.

TAGGING SOURCES

Beyond the tag exchange with the Finder, tags can come from several other sources. The following options in DEVONthink's *Files > Tags* or *RSS* settings control other tagging mechanisms. Tags from these options can also be manually applied via the *Data > Tags* submenu and the context menu in the item list.

RSS: In the *RSS* settings, the *Convert categories and hashtags to tags* option converts categories detected in the feed articles or hashtags in the contents into tags. In conjunction with the previously mentioned Finder tags or Spotlight data, this can lead to a large number of macOS tags being added automatically in the Finder.

Hashtags: Popularized in social media, hashtags are a type of tag prefixed by a `#`. If enabled in the *Tags* settings, DEVONthink can detect hashtags in the contents of

text-based files and convert them to tags for the file automatically. Removing the hashtags from the content will remove the tags from the file. Hashtags do not support spaces in them and they should be listed on a separate line. They will not be detected within existing paragraphs. Of special note, hashtags supports creating nested tags as noted here. The first tag just needs to be prefixed with the # to be detected as a hashtag..

Keywords: When enabled in the *Tags* preferences, DEVONthink will convert the keywords of PDFs and rich text documents into tags.

Properties: Also found in the *Tags* preferences, DEVONthink will attempt to convert certain properties to tags, e.g., the names and email addresses of the sender and recipients of emails.

Geolocation: Enable *Convert location to tags* in the Import preferences to convert the applied geolocation of a file into tags. The *Geolocation* can be viewed in the *Info* inspector.

Assign existing tags: DEVONthink attempts to classify the document based on existing tags. If it can't, it examines the contents and title to find words matching tags and applies those it finds.

Add Vision suggestions to images: This option uses Apple's Vision framework to recognize items in images add subject matter tags to the document. These tend to be more generic identifiers.

Add Chat suggestions to documents: Uses your chosen *Chat* provider to examine the document and add tags. Optionally, you can have it only apply tags that already exist. These are often more specific, e.g., `snow leopard` versus `feline`.

NESTED TAGS

Sometimes referred to as "hierarchical tags", nested tags are a series of related ordinary tags, combined under a parent tag. When you add a child tag, the item automatically inherits the parent tags. In the example shown below, adding a tag of "Casper" to an item would automatically add the "Wyoming" and "US" tags.

A special mechanism in DEVONthink allows you to create nested tags automatically: enter the tags separated by a forward slash. For example, type a tag of `software/productivity` to create a parent tag of `software` with a child tag of `productivity`. Use this option in the places where tags are entered, e.g., the *Tags bar*, *Tags* field of the *Info* inspector and *Info* popover, and the *Tags* column in the item list.

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

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

> **Example:**
>
> ```
> US
>         Wyoming
>                 Casper
>                         Restaurant
>         Minnesota
>                 St. Paul
>                         Restaurant
> ```

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

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

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

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

GROUP TAGS

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

> **Example:**
> Imagine you have a work database with groups for different stages of a project: *Unreviewed*, *Assigned*, *In Progress*, *On Hold*, and *Done*. At the beginning of the process, you'd put the item in the *Unreviewed* group and it would be tagged as such. After reviewing, you could move the file into the *Assigned* group and the previous tag would be removed and replaced with *Assigned*. As the project moves through the staging groups, the tag would change.
>
> And of course you can use ordinary tags, e.g., *Reviewed* or a client identifier, on these items. Those tags would be preserved no matter where you move them in the databases.

Groups tags are applied by DEVONthink automatically. But you can also do some automatic filing by entering existing group tags manually. If you enter the name of an existing group that is not excluded from tagging into the *Tag* bar or an *Info* panel or

popover, the item will be replicated to the appropriate group. You can also drag an item to a group tag in the *Tag Cloud* at the bottom of the *Navigate* sidebar.

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

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

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

AUTOCOMPLETION

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

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

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

SEARCH AND GATHER

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

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

- **Search field:** The search field at the top of every main window allows you to search for tags by using the advanced options for a search. You can also search for tags using a simple `tags:` prefix. Multiple tags can be specified, separated by semicolons. You can also use `tags!:` to exclude tags.
- **Tag cloud:** The *Tags Cloud* allows you to filter the current list of files by clicking on available tags. As you click, only related tags are shown so you can fine-tune the items displayed in the item list.
- **Tags inspector:** The *Tags inspector* not only shows tags on the current document but also existing tags that may apply. Additionally, select a tag and the Tags graph will show other related tags.

Gathering similarly tagged items is powerfully achieved with Smart Groups. Smart groups allow you to use the smart group editor controls to set criteria to be matched. Included and excluded tags can be added as criteria. Files matching the parameters of the smart group are shown, regardless of their

location in the database. This way you can leave your files where they are and create virtual folders for specific purposes.

AI EXPLAINED

Artificial Intelligence (AI) has been the stuff of science fiction writers and tech evangelists for decades. Slowly and quietly, technology evolved as hardware improved and knowledge was gained. But in November of 2022, a company called OpenAI released a Large Language Model (LLM) called ChatGPT. Within a month, it was one of the most talked about technologies in the world, sparking everything from excitement to fear to puzzlement, becoming synonymous with the term "AI". Since then, we have seen a technological arms race to make it better, faster, more powerful and, well… more intelligent. Where this all leads, no one truly knows, but just as fire can be destructive it can also provide warmth and utility when handled properly. And while many companies rushed to be "first to market" with some kind of integration, our commitment to privacy and the safety of your data dictated our direction and investigations. After countless hours of development and testing, to the drawing board and back, we have created controlled ways for AI to be accessible, useful, and safe in your databases. We appreciate the patience and understanding from all of you as we journeyed down this path.

DEVONTHINK'S AI

To clarify, an AI model is the technology used by services like ChatGPT, etc. In contrast, DEVONthink's AI predates these LLMs by 20 years and was built by us using an entirely different set of methods, methods that are still as powerful and functional today as they've always been. For example, the *See Also* inspector, the *Tags* and *Graph* inspectors, as well as commands in the *Data* menu are still controlled by our internal AI. The remainder of this section is about external AI services, like ChatGPT.

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 chat questions are broken down into bits and pieces, called "tokens", which are processed by AI. It examines a token then looks into its huge database of parameters trying to identify it and the most likely token that would follow it. It puts the best match in place then moves on to the next token. This process is repeated over and over again, mathematically constructing the tokens into words, then sentences returned to you as a response.

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 you're asking questions of. Obviously, you need to send the question somewhere. The *default model* you choose will handle those inquiries, though you can also choose others if you have access to them.
- **Prompt:** This is your question or command. These can be simple, e.g., "Tell me about sea turtles." or "For the selected document,

suggest three possible filenames." However, the more specific the prompts, the more specific the responses. You can include directives about how the response should be delivered, what level of explanation, etc. It's even possible to request certain types of formatting like asking for content returned in a Markdown table instead of a list.

- **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. The role can be added as a part of your prompt. If you have a specific role you want to use with automation and templates, you can add a default role in the *AI > Chat* settings.

> **Example:** You are a biologist providing research data for government reporting. Provide a Markdown list of the last ten years of counted leatherback sea turtle eggs compared to hatchlings. Include columns for the number and percentage of increase or decrease. Include a prologue section to the document with an assessment of last years numbers. Include an epilogue with a forecast for this year's anticipated numbers.

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* model. 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. It also can handle more technical inquiries. It does tend to provide more commentary, so you may want to add `No chatter.` to your prompt if you need to curb the excess.
- **Gemini:** Google's Gemini LLM is a fast, no-nonsense responder, often just producing results with little excess commentary. This can be especially useful in information gathering and document construction.
- **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 from the US, Perplexity offers self-branching searches with its Deep Research to gather and assess before responding. It also offers reasoning models. Deep Research is only intended for use with the Chat assistant.
- **Apple Intelligence:** Available on macOS Tahoe, Apple's Foundation model is supported but very limited in its capabilities. With a tiny context window and no support for advanced functions like

vision or tool calls, it's mostly suitable for simple tasks like tagging or summarizing. Note that Apple Intelligence needs to be enabled in *System Settings > Apple Intelligence & Siri* before you can use it in DEVONthink.

- **Local LLMs:** LMStudio and Ollama are two bespoke AI applications that allow running an LLM downloaded on your Mac or accessible on a network.. DEVONthink also supports using other AI application, provided they use an OpenAI compatible endpoint. These applications tout privacy and offline use and can sometimes produce excellent results. However, performance and responses are often limited by your hardware and the size of the model you can run.
- **OpenRouter:** Similar to how WebDAV syncs provide other sync options, OpenRouter provides access to some AI models that aren't officially added. Currently accessible models are from: Amazon, Anthropic, Google, Meta, Microsoft, Mistral, OpenAI, Perplexity, xAI, Baidu, Deepseek, Moonshot AI, and Qwen. But note we aren't providing access to beta, preview, experimental, outdated, or distilled models. The available capabilities depend on the models.Also, if you already have an API key for a specific supported provider, e.g., ChatGPT, we recommend using it instead of accessing it via OpenRouter.

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. We don't advocate being paranoid about using such a service, but it's good to know about and feel comfortable with whom you are sharing some of your data. However, you may wish to opt-out of having your AI "conversations" being used to further train their AI.

DEVONthink doesn't allow AI to have uncontrolled access to your data and databases but takes several steps to safeguard your privacy. By default, using the Chat assistant or any AI assisted automation only uses selected documents. When the database search option is enabled in the settings, only the selected items, items matched by smart rules, or the group selected in the *Navigate* sidebar, i.e., the current location, are accessible to AI, further limiting its reach.

DEVONthink also 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 *thumbnails* 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 doesn't come with AI access enabled and running. It's up to you to set up and choose the options you want to use. So using external AI is completely optional, not a requirement, and not using it may be exactly the level of privacy you want.

Expenses: "There's no such thing as a free lunch." This applies to using a commercial LLM as well. While they typically offer a free account of some kind, it's very limited and made for familiarizing yourself with the process and responses. Once you determine this is something you want to use more often, get out your credit card. 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. DEVONthink automatically chooses the cheaper models for certain tasks, e.g., chatting with the *Help viewer*.
- In the *Usage* dropdown are three options for broadly adjusting the number of tokens being used. This obviously affects your AI costs. While you can experiment with the settings, *Auto* strikes a good balance and is one less thing to think about. You can always temporarily change this for certain situations. Chatting about a document will use more tokens the longer the document. In this case, you could try setting the *Usage* to *Cheapest*.
- 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 "thinking". The *Chat assistant* or AI-based smart actions, like the `Chat - Query` action, let you temporarily switch models.
- When generating images, use very specific image prompts to avoid endlessly iterating through pictures that aren't what you're envisioning. While it can be fun to see

what it comes up with, image generation is usually a more costly use of AI.

Quality of results: As we discussed previously, these chat engines are doing incredible computational gymnastics to produce responses but don't have any actual knowledge to draw from. It has no way to verify its answers in the way a human can. Earlier on they were known for "hallucinating", i.e., returning responses that were complete sentences but made no sense or had little to no relevance to the question asked. Things have certainly improved, and likely will continue to, but it is still possible to have incomplete or inaccurate responses. So while you may get a reasonable response, be aware the result isn't guaranteed to be accurate. Especially on questions of consequence, you should be checking the responses.

The limitations of local AI: No one wants to share their data. No want wants to pay for AI. We certainly understand those things. While there is an ever-growing list of "Run the AI of your choice on your Mac now!!" applications, let's take a realistic look at running your own AI:

- **Performance:** AI requires a lot of computing resources to run well. Similar to how DEVONthink loads a database's index into memory for lightning-fast searches, classification, etc., an AI engine loads its model into memory. The larger the model, measured in the number of parameters, the more memory is required to effectively run it. However, many Macs have very limited RAM. Even a "good MacBook" with 16GB RAM, would only be able to run a small model of 6-8 billion parameters, given other apps and the operating system are also using machine resources. Those are very small models. Running larger models may be possible but they will be slower to the point of being inefficient.
- **Quality of responses:** With the aforementioned limitations imposed by machine resources, you may feel a small model is just fine for you. While it may actually run, the responses you receive are almost certainly going to be from less accurate to hallucinating. Consider the disparity in knowledge between a child and an adult. Ask both, "Why is the sky blue?". A child would have a small number of "parameters" to drawn from to answer the question. But the adult, especially one with more specialized knowledge, would have a vastly larger set of parameters to respond from.
- **Context window:** The context window is like the short term memory of AI, and it is a finite resource. The smaller the context window, the sooner AI will lose track of the "thread of the conversation". For commercial LLMs, this is large enough for ad-hoc inquiries but the size can be a limiting factor when trying to process longer documents, e.g., a scientific PDF. For locally run AI, the context window is much smaller. And using larger context windows locally consumes more resources.

However, if you're inclined and curious — and your 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. For example, AI has access to the current location in a main window, not all your databases. It also isn't going to operate like an automaton, creating databases, constructing its group structures, downloading and filling those groups, then examining and issuing reports on it all. It is an "assistant" in your labors, not your replacement.

Another critical thing to be aware of, AI is not going to "process and connect" years of your documents and information in your database. The way AI is hyped by many makes this sound feasible, but it actually is not. Will you be able to process documents in a useful way? Of course, but on a much more limited scale. So while we understand the hope, actually accomplishing this would be time and cost-prohibitive for most people and require sharing all those documents with third-parties.

We believe it's important to approach AI in DEVONthink with a good understanding of the possibilities and limitations (and yes, some things may change as technologies evolve). That all being said, we believe you'll find many uses for the extended abilities of AI in DEVONthink. In the next section, you'll find an overview of where AI is integrated, some practical use cases, and an important tip on how to use AI more effectively.

AI IN PRACTICE

In the previous section, we introduced AI concepts and considerations as related to DEVONthink. Here we'll cover: where AI is integrated, some ideas for practical uses, an explanation of one of the important settings, controlling AI's access, and a few tips on getting better responses.

ASSISTANTS

Though it is possible to have a chat with AI, DEVONthink isn't merely a front-end to an AI provider. It has been integrated into several aspects of the application, providing new or improved functions, complementing our own internal AI. For non-automated functions, you interact with AI via several assistants and a specialized server.

Chat Assistant: Many of your interactions will happen in the *Chat inspector* or *Chat popover*. Whether you're asking an impromptu question or chatting about the selected document, the assistant is made just for these things, all shown in a familiar message-style interface. And if you want to keep a record of the "conversation", you can easily save it as a reference for later. If you become a frequent AI user, you'll likely chat via the assistant often.

The *Chat inspector* inspector and the *Chat popover* have the same functionality but operate independently. When they open, they use the same default AI engine. However, each can use a different model and each conversation is isolated. So you could have a discussion in the inspector and issue commands in the popover, without losing continuity in either discussion.

Note the Chat inspector belongs to a window. So if you have an active chat in a main window and open a separate document window, it will not retain the previous chat. Also, the Chat popover is persistent, retaining its contents across relaunches of the application.

Search Assistant: When doing a toolbar search, press the *AI* button to open the *Search assistant*. This lets search with more natural language, e.g., "Show me PDF documents with more than 10 annotations." The AI processes and shows the raw search syntax, `kind:pdf md_annotationcount>10`.

Help Assistant: Instead of reading through DEVONthink's built-in help, you can open the *Help* assistant and ask questions. The AI model is given access to the documentation and may be able to provide answers and links to related parts of the documentation.

Script Assistant: If you want to create DEVONthink scripts but don't know how, AI can assist in drafting a script for you. Choose *Data > New > Script* to open the *Script Editor* window, choose a model, explain what you want, and let the AI code something for you.

MCP Server: An MCP server is an internal AI server allowing you to connect to and work with your databases while outside our application, but still in a controlled and safe manner. There are a wide variety of commands available encompassing many practical features, like: creating and modifying documents and getting information about them, document format conversions, searching databases, classifying and filing documents, transcribing speech-to-text or text recognition, performing online searches, file imports and exports, etc. Used in conjunction with MCP-capable applications, e.g., Claude Desktop, this expands the ways you can work with your data.

Once the server is set up, you will be able to ask questions and give instructions like, "Get this document's DOI. Then find the document online and download it to my Bibliography database with full CrossRef metadata."

One distinction to make between the *Chat* assistant and the MCP server is: prompt versus skills. In a chat you usually discuss things in a more impromptu manner. With MCP, you can create a range of connected commands and consolidate them into a skill to accomplish repetitive tasks. You define a generic set of MCP actions for AI to follow when the situation requires it. So instead of telling AI to file a particular email, give it examples and parameters to process and file future emails. Or create a system you run daily that examines and builds a report of things recently finished, due soon, or overdue. When run in conjunction with other MCP servers, you can create and run some very complex workflows.

And all DEVONthink's MCP interactions are done with your privacy and data-safety in mind. For a deeper dive on the topic, see the *Appendix > MCP Server* section.

CAPABILITIES

The possible uses of AI are extensive and as you work with it, you're likely to stumble onto new ways of using it. But here are a few common, broad functions.

Document Processing: Summarize the document you're reading, or transform selected text via two buttons in the *Navigation Bar*. Or use AI to change metadata like label, ratings, etc. Or have it examine the contents for tagging, renaming, etc.

Media and Image Processing: Process and transcribe audio and video files and examine images with machine learning. You can generate a transcript from audio or video files in your databases. Let AI determine the subject, transcribe text on signs, menus, etc. In both cases, the text is stored in one of a few ways. With one setting this can even happen automatically when adding the files to your database.

Document/Image Generation: Create documents with AI, both text-based and images. DEVONthink provides some AI templates made for creating text documents. Or use *Data > New > Generate Image* command to open the *Generate Image* window where you can describe an image and have AI create it for you. Additionally, some chat inquires can create new documents. You can read more about this in the AI and Your Documents section.

Database Searching: You can ask AI to look for documents as you talk with the *Chat* assistant, the *Search* assistant, or the *MCP server*. For example, you could ask for it to find your espresso machine manual or a receipt for your telescope purchase.

Automation: Using chat queries and responses in smart actions like `Chat – Query` and the chat-based placeholder `Query Response`, present new automation possibilities for everyone. Additionally, there are new AI-driven commands available in AppleScript and JavaScript.

PRACTICAL USES

The preceding section presents a more general view how you interact and broad uses. Let's look at a few example use cases and methods:

AI Renaming Files: It's not uncommon to get a document with a less than useful name. Select it and tell the Chat assistant to `Add the filename to the finder comments of this document then rename it with a reasonable name`. This lets you preserve the original name, if needed, but also gives you something easier to find at-a-glance or in searches. Alternatively, you could tell it to `Add only the filename as an alias on this document`....

Another option is to use *batch processing* to rename selected files based on their content. These could be any type of file. Select a few documents and choose *Rename to Chat Suggestion* in the *Tools > Batch Process* submenu. Your default AI engine will attempt to examine each document and rename it. Note you can choose another engine by clicking the ↕ button.

AI Tagging Assistance: While it's possible to automatically tag documents on import, you may want to handle tagging on a case-by-case basis. Select a document and ask Chat, `What tags would you recommend for this document?`. If you like some of the suggestions but don't want to add specific ones, you could tell it to add them, e.g., `Add three broad and two specific`

`tags from that list`. Or if this was in a recipe database, you could tell it to `Add the ingredients as tags`. And don't miss the AI commands *Data > Tags > Add Chat Suggestions to Documents*, *Add Vision Suggestions to Images* or the same commands in the Tags smart action.

AI Documents from Web Content: If you have a bookmark selected in DEVONthink and want to gather specific information from it, you can ask Chat to create a document for you. For example, if you were reading about how to build a birdhouse, you could use `Add the instructions on how to build a birdhouse on the selected page`. You could also try a less specific prompt, like `Capture the instructions on the selected page`. The default format will be Markdown but you can request plain text, Markdown, or HTML documents from Chat. However, it is possible for the AI to respond with a format it decides.

Here's another example: Imagine you're shopping for a car and looking at a bookmark in DEVONthink. You get some results you like but just want to extract some specific information separately. Tell Chat to `Capture the two cheapest cars newer than 2014 with less than 100,000 miles from this page`. With some AI engines, you may get the document and also some commentary about them as well.

AI Searches: With AI, you can do "semantic searches", essentially looking for things related by concept instead of specific terms. As an example, ask Chat to look for `documents that talk about vehicles` and watch it generate its own query, e.g, `searching for car* OR boat* or plane*`.... Logically, you can be more specific, as needed. In a database of PDFs from car manufacturers, you can ask for `documents about Italian vehicles` without mentioning a brand, and it will return documents about or that mention Italian vehicles.

One thing you may be surprised by is how natural a chat can be. Say you're gathering information for a local animal shelter and want to locate some of your documents on different breeds. You ask Chat, `What documents discuss Manx cats?`. You then ask, `What about collies?`. Then you ask very naturally, `ferrets?`, without repeating the full question, and get results. Using an AI with a large context window, the previous discussion is considered when replying to subsequent questions.

AI SEARCH SCOPE

The data stored for AI models is usually quite extensive, especially for commercial services. This means some questions can be answered directly from its own dataset. However, no service will have all the information needed for every reply and the training data stops at a certain point in the past. Due to these conditions, providing answers requires accessing data outside its own boundaries. This not only may provide more current information but can also reduce hallucinations.

Inside DEVONthink, AI has the ability to initiate a toolbar search. This is nothing more than an automated way of entering search

terms. On its own it won't necessarily create an optimal search, e.g., using search prefixes, but it may produce some useful results.

Beyond the toolbar search, the options in the *AI > Chat > Search* settings come into play. These control where AI can search for information when creating a response for you. Note these aren't options it must use; they are ones it could use. If the LLM can't answer from its own data, it will try any of the options you've enabled. The options are: *arXiv*, general *Web* searching, *Wikipedia*, *PubMed*, or *Database*. The last option controls whether AI can examine the contents of documents in your database. If disabled, AI may use DEVONthink's toolbar search to display items but it can't access the contents of documents directly. If enabled, the AI can examine documents' contents in a toolbar search, in selected groups or documents in the item list, or selected locations in the *Navigate* sidebar. Next we'll cover how to use this "safely".

CONTROLLING AI'S ACCESS

Your databases likely contain private documents and information, things you may not want accessible to AI. When you're using the Chat assistant to search your databases with the *Database* search option enabled, it's important to understand how AI's access works. It's a simple and controllable concept that helps you limit its reach.

Selection: The AI firstly sees a selection as everything it has access to. This includes a selected document, even if it's not currently displayed in the *view/edit* pane. When you search, it will report it's "Searching the database", however it is only searching the selected item. If you have a group selected, AI will search the documents in that group and its subgroups. So selecting a document or a group gives you very strict control. And yes, if you select multiple groups, they will be all be used as the limits of AI's reach.

Location: On the next level, is the current location. If you're in a group with four unselected documents, AI considers the group and its documents as "the database". Whatever you ask it to search for will only involve those four documents. But not every group has only ungrouped documents. In this case, AI will search documents within the groups and subgroups of the location. If we follow the logic, this means as we ascend through parent groups, we are extending the range of groups AI can search while still confining it to the current location. And if we select the database in the *Navigate* sidebar, we are giving it access to all the documents in the root of the database. So if you're not quite sure what specific group you may need to search, you can go up as far as you're comfortable and the subgroups will be searched.

Extended Locations: To open up some other possibilities, select a local smart group in your database. AI also sees this as "the database" to be searched. If you want an even wider range, you can select a global smart group. And for more impromptu uses, AI will treat your database search results as the only place it can search. So you can use these dynamic items as ad-hoc locations, searching documents no matter where they are.

Additional Control: Now that we've seen how much access we can give, there may still be places we want AI to ignore. AI honors the same setting as our internal search engine, *Exclude from Search*, but also the explicit *Exclude from Chat & MCP*. Select a document or group and open the *Generic* inspector or the *Info* popover, and enable the exclusion. If this is a group, it will hide all its contents as well, so think about what you're excluding. You can even exclude an entire database from AI in the *Database Properties*.

GET TO KNOW YOUR AI

As AI engines aren't all the same, what you ask about and how you phrase things can vary. Also, their capabilities depend highly on the selection and the settings. So how do you know what is possible and how to talk to your AI engine? Open the *Chat inspector* or *Chat popover* and ask questions like these:

- **Create a table of your capabilities:** This produces a list of what the AI can do within DEVONthink. You may be surprised at what it is capable of. This one is the most important to get a real understanding of what's possible.
- **Create a table of the properties you can get and set:** If the AI can access or modify the properties of an item, it's good to know which ones.
- **How can I effectively ask you to search for something?:** It's important to know the terms and phrasing an AI model understands. Asked this way, it usually provides examples as well.
- **How can I effectively tell you to create an item?:** Following suit, you can determine how best to have AI create items, if it reported it can.
- **How can I effectively tell you to update an item:** If the AI reports it can update existing documents, it's good to know this phrasing too.

These questions can be especially useful if you're trying to decide which engine to use. Ask your questions, choose a different model or engine, and ask it the same ones. For future reference, you can save the chat or even tell the assistant to put its responses in a new document.

Another handy tip if you're testing, or even just curious about, how models respond to the same prompt. In the *Chat* assistant, choose a model and use it as your normally would. Then choose a different model or AI engine in the selector popup and click the ↻ button. The newly selected engine will respond to the last prompt you gave to the previous model. This can be useful when you're testing responses from specific models or AI settings.

TIPS AND CONSIDERATIONS

Finally, here are a few tips to help you potentially get better results from AI…

Focusing with metadata: Tags, *Finder comments* and other metadata may play a factor in AI's searching. A PDF about canoes may not contain the word "hobby" but if you add it as a tag, it's more likely AI will find it. Adding it to Finder comments may improve the chances of being found. However, as noted in the next tip, precision is helpful. If you ask about documents regarding `hobbies`,

the AI will likely look only for that plural term, not assuming you want it to consider `hobby` as well.

Phrasing and clear and specific prompts: Your phrasing can affect the method of searching. For example, if you say, `Find documents about hiking`, a toolbar search may be initiated. But if you instead say, `What documents mention hiking?`, the AI may examine the contents of available documents to find matches. If you are having problems getting an expected response, try rephrasing your prompt.

Providing clearer and more specific instructions is going to produce better responses. Consider the prompt about a selected document: `Translate this document to Spanish`. This will almost certainly result in the document's content changing, just as requested. But if you want to preserve the text, ask `What is the Spanish translation of this document?` This should return the translated text. But now what to do with it? You could save the chat or be even more specific in your prompt: `Translate the text of the selected document to Spanish and save it as a Markdown document. Include the original text in italics at the end of the new document. Preserve the document's original filename in the Finder comments.`

We hope these last two sections gave you a clearer understanding of the complementary, but powerful, role of external AI in DEVONthink. You'll find other passages threaded throughout other chapters, e.g., AI and Your Documents or the AI Assisted Automation section. As it is a feature of the higher editions, keep your eyes open for blue sidebars or sections of blue text as you read.

A WORD ABOUT BACKUPS

As the old adage goes, "Expect the unexpected." and being prepared for an emergency provides peace of mind when the unexpected eventually happens. Despite Macs being well-crafted, they are still machines which can (and do) fail. Your hard drive will fail (it's not a matter if, but when). Any sudden flux in power could corrupt the files on your hard drive. Beyond electromechanical issues, your laptop could be dropped, lost, or stolen. And a catastrophe, like a house fire or flood, could claim your computer and data as a victim.

How important is your data? For many users, the value of the data is much greater than the value of the computer that hosts it. If your data is critical to your business, education, life, etc., back it up.

INTERNAL BACKUPS

DEVONthink does not do file backups. That is the job of backup applications, as we discuss next. However, for your databases, it keeps an internal backup of each one's internal metadata. This is a rolling weekly backup, maintaining two internal backups inside the database package. These are only used for troubleshooting in very specific circumstances.

FILE BACKUPS

When it comes to backups, there are a few critical things to consider:

- **Do not put your databases in the cloud:** This may seem like an obvious thing to do, but you should never put your DEVONthink databases in any cloud-synced location, e.g., iCloud Drive, or you could irreparably damage them.
- **Sync is not a backup:** As noted in our FAQ, *sync is not a backup*, neither advertised nor advocated as such. While database restoration may be possible with sync data, it is not meant to be relied upon or used in lieu of proper primary backups. Backups should be application-agnostic; sync is not. And backups preserve previous versions to restore; sync does not. So you can't recover files from the past.
- **Snapshot-style backups:** When considering backup applications or online backup services, you should not use a feature that claims continual or "real-time" backups. Instead, you want to use a snapshot-style backup that backs up the machine on a schedule, at a particular point in time.

Backup Options: Concerning how and where to create your backups, there are several options to consider. Generally, we do suggest having a local backup as your primary as it's the quickest and easiest to access, unaffected by network conditions or online services.

- **Local:** Backing up your files is simply done and often only requires connecting a hard drive. Apple's Time Machine or similar application like Carbon Copy Cloner and an external drive makes backups as simple as connecting an external hard drive, giving Time Machine permission to use it, then letting it do its thing. And with the low cost of portable external drives, it's even feasible to take a multi-terabyte drive, small enough to fit in your shirt pocket, for backups when you're out and about.
- **Time Machine Snapshots:** Other than being free, already installed, and very simple to use, another benefit of using Time Machine is local snapshots. If you have backed up your Mac with it just one time, Time Machine will create local snapshots of the internal drive even if your backup drive isn't connected. This happens once per hour, keeping each snapshot for 24 hours. While it may not allow you to recover something from a month ago, it can certainly help you restore something within the last hour or day. So regardless if you ultimately end up using another backup application, we strongly recommend doing a full backup with Time Machine, especially when you're first setting up a new machine.
- **Backup Archive:** Specific in DEVONthink, another available backup option is creating an optimized and compressed copy of the whole database that you can then save on a server or other media. Use *File > Export > Database Archive* or *Scripts > Export > Daily Backup Archive* to create a ZIP file of the database. The former option allows you to choose a folder to save to; the latter uses a *Backup* folder in your home folder.
- **Local Networked Volumes:** It may be possible to do a backup on a file server (NAS) on a network. This may be done via a backup application supporting backups to remote volumes or possibly backup software provided by the NAS

manufacturer. In either case, you should again ensure it's using a scheduled snapshot, not continuous backups. Also, some routers allow you to connect an external hard drive. This too may be used for backups. Bear in mind, backup performance to a networked volume of any kind will be better when your Mac is connected via Ethernet.

- **Online:** Backing up your data to the cloud is also possible, either as an alternative or a secondary backup. Arq Backup is well known to work well with DEVONthink's databases. Check the support pages for a service to see if it uses scheduled backups.
- **Offsite:** Considering the potential for unforeseen events, like fires, earthquakes, tornadoes, etc., having an off-site backup is widely considered an important part of a full backup strategy. A full backup can be performed periodically and stored at a secure, off-site location such as a bank safe. You can also put database archive ZIP files of your database in your cloud account to provide another online backup.

Redundant Backups: There is a common method of backing up files, known simply as the "3-2-1 backup". This means: 3 copies of a file, on 2 separate types of media, with 1 backup offsite. Of the three copies, one is the working copy, in DEVONthink, this is the database you're working on. The other two copies are backups. Of the two media types, one is typically an external hard drive. The second could be another external hard drive, an online backup, or even specialized media like a tape drive used in corporate situations. And ideally, you should have at least one offsite backup as previously mentioned. While using this method isn't a requirement, it may be something you want to consider.

Test Your Backups: Lastly, and something many people don't consider: you should periodically test your backups. Anything in life can fail at some point, so yes it is possible to have a bad backup. Generally, it's not something to be overly concerned about. However, every 4 to 6 months, you could restore a database to a separate location and open it. DEVONthink verifies a database when opening it and reports if there is anything wrong. If all is well, delete it and repeat with other databases, if desired. If there is an issue, close and delete the restored copy. Then do a *File > Verify & Repair Database* on the current database in DEVONthink to ensure it's healthy, fix things up if it's not, then initiate a manual backup. You may want to add a calendar event or even in the *Comment* in the database's *Database Properties*, noting the date of the verified backup.

TUTORIALS, TIPS, AND MORE

In addition to the documentation you're now reading, there are specific tutorials in the Support Assistant. There you'll also find extra scripts, smart rules, and templates that extend DEVONthink's functionality.

For a great resource of tips, promotions, and release announcements, check out the Extras sidebar or 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.

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

TASKS

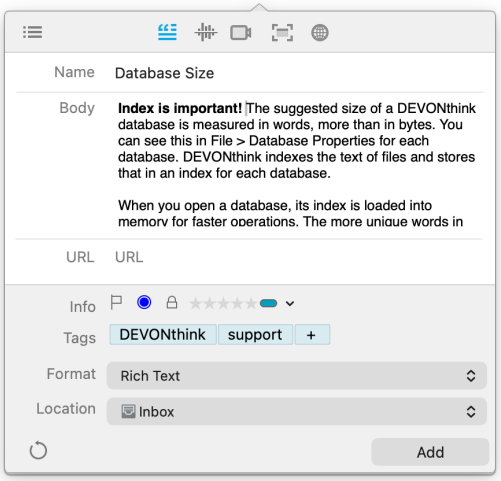
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The number of possible uses for DEVONthink is nearly endless. In this chapter we present a brief view of the core activities, and some use cases, for daily life and work.

WRITING

If you need to take notes or write longer documents, you can do both in DEVONthink while working directly in your databases.



If you need to write a quick note, open the *Take Note* view of the *Sorter*, type it up, and quickly add it to your selected location. You can compose in plain or rich text, Markdown, or formatted note formats. You can open this view with *Data > Take Note* or the command in the *Dock* menu. Add a hotkey in the *Sorter* settings so you can open the *Sorter*, type your note, and tap the ↩ Return key for very efficient note-taking. And all these notes can be further edited directly in DEVONthink.

If you need to write some longer form documents, you can easily create a document via the *Data > New* menu in one of several formats including plain or rich text, Markdown, etc. These options are also available in the *New* toolbar button and the context menu in the item list. No matter your need, you can likely find a format that suits it.

If you're researching a topic with a PDF reference, you can create a document called an annotation file. This is a separate but

linked document where you can write as many notes as you need. Insert selected text as quotes, add links to certain pages, and even add an AI summary right in the document. If you're taking notes on a video, you can add timestamps in the annotation file and take notes on it. And when the video is paused, you can add a screen capture of the current frame into the document.

Using DEVONthink's powerful templates feature, you can quickly create a new copy of often-used documents. One example is our Phone Note template. When you answer a phone call, use it to record the essence of your conversation, and fill in the details about who called. You'll notice it's already timestamped for you too so you have an accurate record.

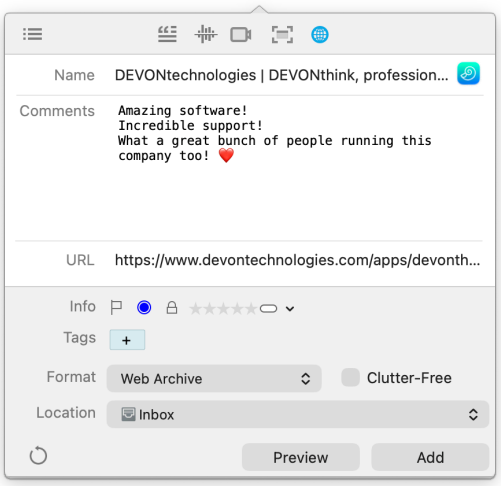
Possible uses:

- Write down ideas before they're forgotten
- Take quick phone messages
- Keep project notes, meeting minutes, journal, and more

Continue to read here:

- Create new documents
- Use annotation files for note-taking about certain documents
- Revise notes and documents using the built-in rich text editor

CAPTURE DATA FROM THE WEB



Increasingly, information is provided not on paper but directly through web sites, blogs, online news sites, social media, and user forums. Clipping is just another tool you can use to build your "library".

DEVONthink has several mechanisms for clipping web contents. A browser extension, including a Safari-native one, bookmarklets, useful when using a browser with limited extension support, the macOS Share menu, and services. Capturing content in several formats, e.g., bookmarks, Markdown, formatted notes, rich text, etc. is fast and efficient. And for a more future-proof capture, or sometimes for problematic paywalled sites, you can also capture to PDF. And these formats are editable right in DEVONthink. So not only can you capture data, you can edit and annotate those captured documents too.

Possible uses:

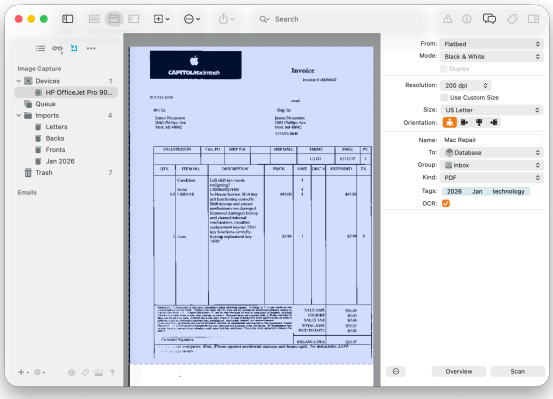
- Capture important news, research, hobby and pastime information
- Collect related links and documents in a fully searchable database

Continue to read here:

- Clip web pages directly from your browser
- Capture selected content using services
- Capture data with bookmarklets or browser extensions
- "Print" any web page or document as PDF to your database

GOING PAPERLESS

DEVONthink is the "paperless office" solution for the Mac, a central hub for all your paper and electronic documents.



In addition to the steady inflow of emails, we still have and receive many printed documents. While it's a good idea to keep more recent hardcopies, we can't keep everything forever. Using the integrated scanner support you can scan documents, make them searchable through OCR (optical character recognition), and file them all directly in DEVONthink. You can scan single documents, including double-sided ones, multi-page documents, and scan multiple small documents like receipts. There is even a job queue where you can add information about several documents you need to produce, and have it run in a more unattended fashion.

In addition to the internal scanning, you can send scans into DEVONthink from third-party scanning applications, e.g., ScanSnap Home. And if you have a collection of scans you need searchable in your database, you can add them via the *Import > Images (with OCR)* command that will add a steady stream of searchable documents into your database.

Lastly, with a little setup between the Finder and our application, it is possible to use smart rules to add scans to a Finder folder and have DEVONthink detect, import, and OCR them automatically!

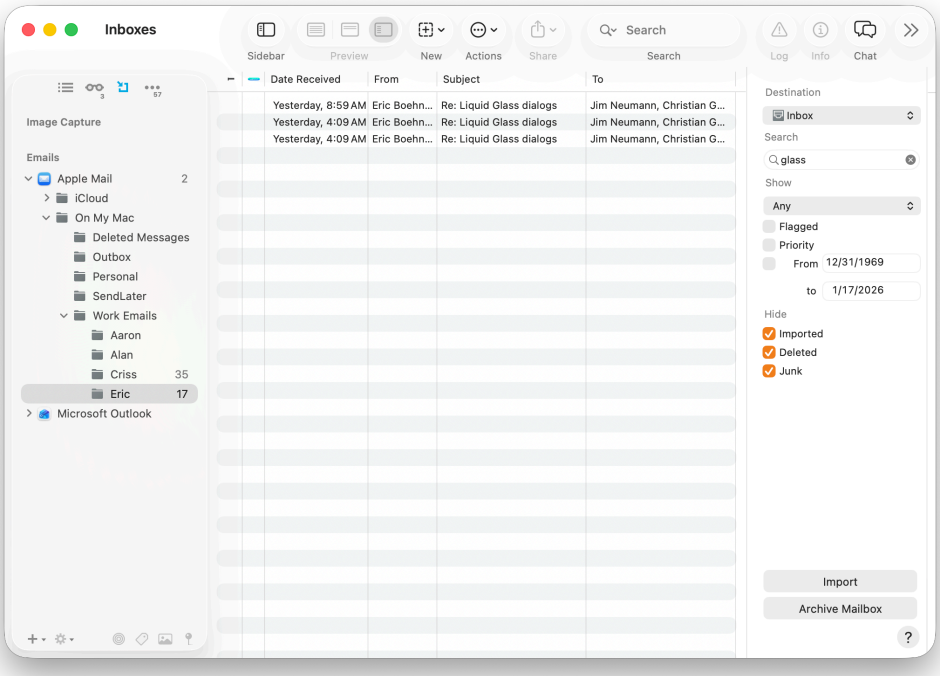
Possible uses:

- Store your important documents, both personal and professional
- Archive invoices, offers, purchases, or software licenses
- Keep accurate records for legal and financial purposes

Continue to read here:

- Scan paper documents
- Using smart rules for OCR on-the-fly
- Create a compliant revision-proof database for critical information

HANDLING EMAILS



DEVONthink lets you archive emails or send documents via email directly from your databases.

Get your emails into DEVONthink from Apple Mail, Microsoft Outlook, or any email applications using standard Unix mailboxes, e.g., Thunderbird. You can even *set a hotkey* to archive messages and mailboxes while in Apple Mail and Outlook. With its hierarchical groups structure, *classification* feature, and powerful search engine, DEVONthink is perfectly suited for adding, sorting, and finding emails in your databases. And attachments can be imported automatically or on demand.

You can also use the *Send by Email* command in the *Data* or context menu to create a draft email with a selected document attached, provided you're using a compatible email applications. And of course, you can drag and drop from your database into an email you're composing.

Possible uses:

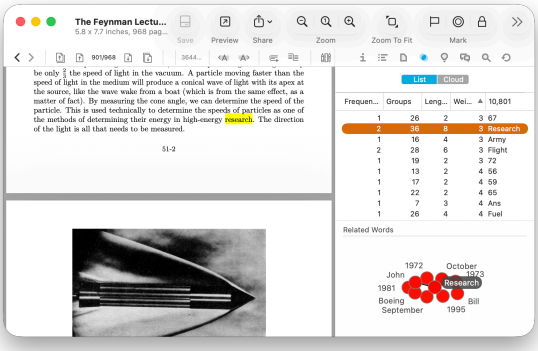
- Archive invoices, offers, purchases, or software licenses
- Gather personal emails for posterity
- Keep project-related emails and other documents together

Continue to read here:

- Import emails or archive mailboxes
- Email documents or reply to archived emails

DOCUMENT RELATIONSHIPS

With its built-in artificial intelligence (AI) functions, DEVONthink can be used to analyze the documents in your databases as show you information and suggestions about them. There are more AI-driven functions than shown here but here are a few highlights...



DEVONthink has long had its own internal AI, the brain of the application, working in the background, indexing and analyzing the content and locations of your documents. Every time you add documents, make changes to them, reorganize them, it updates its internal knowledge. This knowledge is used to offer a few things: suggestions where an item could be filed, what group it best belongs in, and what documents seem to be related to it. These recommendations can be viewed in the *See Also* inspector. So as you work with your database, the AI takes note and adjusts with those changes, essentially training itself based on what YOU do.

In the *Tags* inspector, the AI displays the tags on a document. But using its internal knowledge of your tagging practices, it also makes suggestions about other tags that you may want to add to the document. Adding and removing tags is as simple as two clicks.

In addition, a network graph of a selected tag illustrates the relationship between a tag and others in your database.

Lastly, the *Graph* inspector also shows connections between documents. But in this view you can see how a document is linked to by other documents via item links or WikiLinks. Or examine what documents mention each other. While this information is also found in other specific places, this graph can be helpful in visualizing the relationships in one consolidated view.

Possible uses:

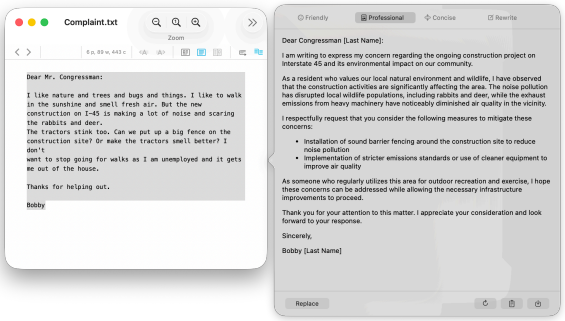
- Analyze the complexity and focus of a specific document collection
- Helps make tagging decisions and apply those tags
- View the interlocking relationships between documents, their tags, and links

Continue to read here:

- Get an insight into the tagging possibilities for a document
- Get recommendations on where to file your documents
- Examine the word distributions of your documents

LEVERAGING AI

As a complement to DEVONthink's built-in AI, you can use an external AI engine to process, and in some cases, create documents in your database.



You can leverage many of the capabilities of third-party AI services with your documents and databases in a few ways. Your boss sent you a few PDFs but you don't have time to read it now. The *Summarize Documents via Chat* command can produce a document with summaries of them for you to read the key points. If you need to add an image to a document you're working on, describe it and save the image when you see one you like. Or imagine writing an email to a government representative proposing an idea, but you aren't sure it sounds "professional". Use *Edit > Transformations > Transform text via chat* to get a suggested rewrite. You can also ask questions of a chat engine, requesting specific output, e.g., "Create a Markdown list of the 15 best vacation spots in the continental US for a family with kids. Provide a single paragraph summary as to why each is included and add links to the Chamber of Commerce of each place, where available." and you should shortly have a document in your database.

AI also plays a part in other aspects of DEVONthink. Select the toolbar search field, tap the ↩ Return key, and press the *AI* button. Briefly describe what you're looking for and AI will show you the DEVONthink-specific search syntax or launch the search for you. For automation enthusiasts, there are new AppleScript commands as well as placeholders and smart actions that integrate with AI. Now you can utilize AI in your automations to produce more customized results.

Do bear in mind, the capabilities are relative to the AI engine you're using, as well as any associated costs of using a commercial AI service.

Possible uses:

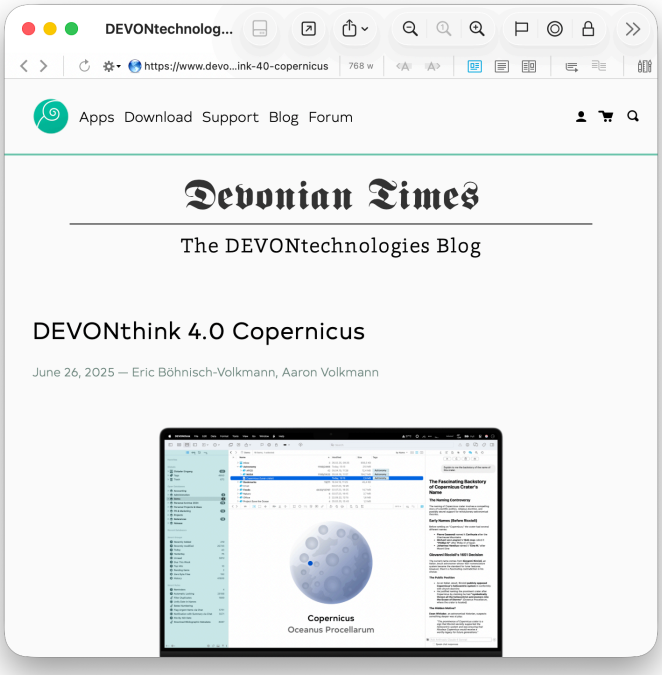
- Get overviews and essential concepts of documents
- Get creative with AI generated images and story outlines
- Ask impromptu questions, further refine via chatting, and save the conversation or results

Continue to read here:

- Analyze and create documents with AI
- Get recommendations on rewriting your text
- Create a smart rule using AI to affect the results

BROWSE AND BOOKMARK

In additions to being a knowledge and information database, DEVONthink has built-in web browsing capabilities. This allows you to browse and capture online information directly in a database.



Whenever you select a bookmark, DEVONthink loads the online content in the *view/edit*. You can navigate between pages and sites, just as you do in your browser. However, unlike your browser, you can immediately clip and capture to your database. From the *Tools > Capture* menu or the ⚙ button, choose the format of your choice and the document will appear in the current group. You can also use DEVONthink's Clip to DEVONthink just as if you were in an external browser. You can also select, then drag and drop content from the loaded page directly into your groups, the *Sorter*, etc.

In the *Scripts > Tabs* menu, you will find the *Open Google* script. This opens a new window or tab with Google loaded and ready to search. Where you go from there is up to you.

Since this is an actual browser view, another powerful option is accessing online cloud accounts. For example, you could log into your Dropbox account and manage things without leaving the application. That includes adding files to it. Grab a file in the Finder, then drag and drop it into the loaded page in DEVONthink. And to extend that idea even further, leave the browser open, switch to another DEVONthink window, then grab a document and drag and drop it between DEVONthink windows to upload it!

With its integrated, document-based web browser, DEVONthink can also be used as a bookmark manager. Organize your bookmarks wherever they're needed, from a collection of them to grouping them with other documents. You can even import bookmarks from some of the popular browsers.

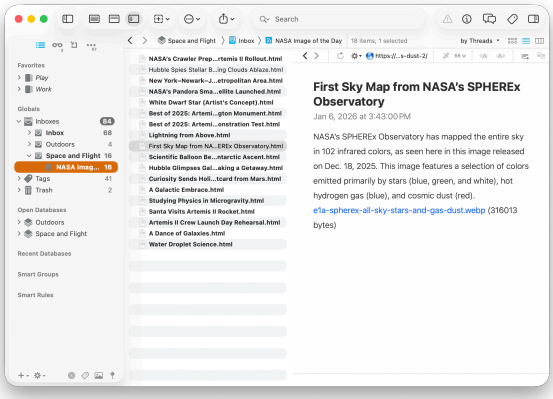
Possible uses:

- Build a library of bookmarks right inside DEVONthink
- Visit frequently visited web sites, including paywalled sites, in a convenient interface
- Capture and clip content from web sites and store it in DEVONthink
- Access your cloud services, like iCloud or Dropbox

Continue to read here:

- Create a new bookmark
- Capture data from the Web
- Integrate news feeds with your data

READ NEWS FEEDS



Keep up with your RSS news directly in your database.

DEVONthink comes with built-in support for news feeds, which makes it a reliable basic news reader. Add your favorite RSS feeds to your database. News comes in as HTML, typically linked to an original article. Jump to the linked article with a single command: *Complete News*. Clip the linked page to another format or select content and use our services to make a new document from it. You can also set a global feed format or a format for each feed, to gather information e.g., as PDFs.

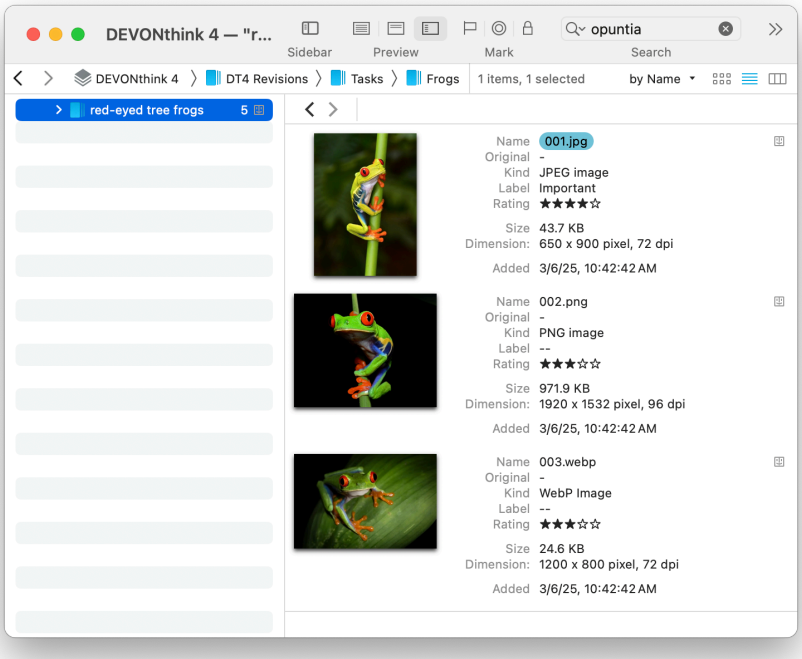
Possible uses:

- Read your daily news in a convenient interface
- Integrate "live" newsfeeds with your other documents
- Grab interesting information from linked pages and store it in DEVONthink

Continue to read here:

- Add a news feed
- Choose a specific per-feed format
- Create new documents with selected content

INDEX FILES ON YOUR HARD DRIVE



DEVONthink's databases are designed as portable, self-contained collections of documents and information, encapsulated in a single "file". However, some use cases require external access to some documents. But DEVONthink can accommodate that too.

If you have an existing folder structure that must be accessible by others but you still want to leverage DEVONthink's power with them, you may be able to index them. Indexing creates links to files outside the database and treats them as if they've been imported (copied). The database doesn't contain copies of the files, only links to them, so it will be smaller than an imported database. You retain the ability to search for and edit compatible files. Files can be opened in their external applications, modified, and saved as you normally would. Since you're acting on the actual files in the filesystem, the database is "updated" automatically. And yes, it's possible to have a hybrid database containing both imported and indexed documents.

Indexing is often used with cloud-synced folders, e.g., Dropbox but can be used with any accessible location. Bear in mind, performance can be affected if indexing networked volumes. Another option is to index media files, including on removable media. If you have a thumb drive of family photos, you can index those pictures and view them in DEVONthink while the drive is mounted. Or if you have assets on unmounted media, you could search for files on it and determine where they're located. In the case of text-based documents, this includes content-base searches. And though it's not a replacement for Apple Music or a

bespoke music player, you could index your Music library or a folder of audio files and play them when you wish.

IMPORTANT: While indexing seems like the best of both worlds, using it needs to be approached thoughtfully as you are dealing with the actual files in the filesystem. Please read and understand the In & Out > Importing & Indexing section before committing to it.

Possible uses:

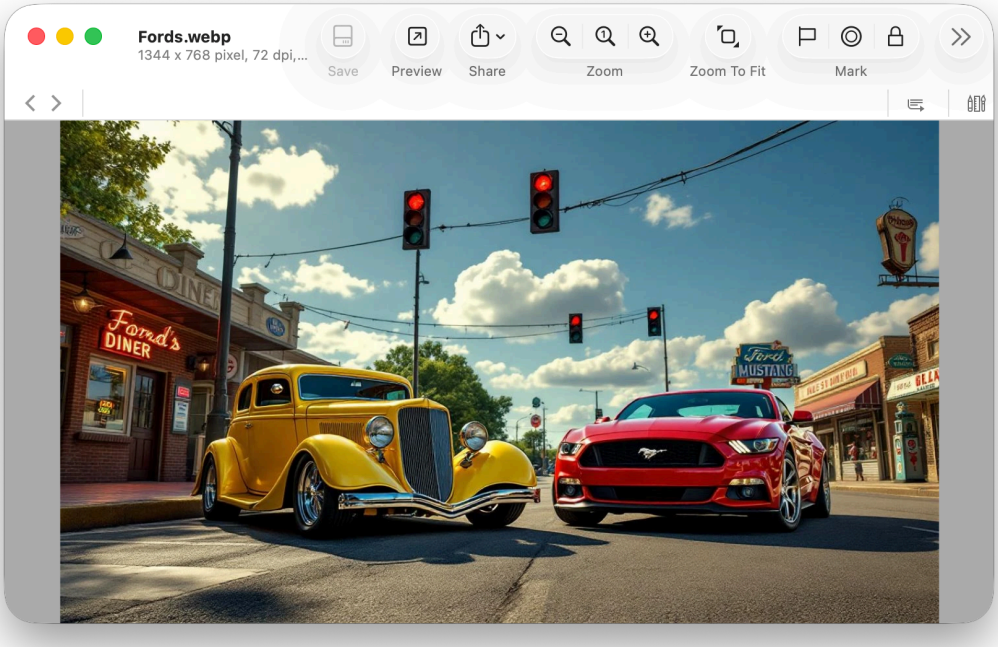
- Keep the folder structures you've created in the Finder, while allowing access to DEVONthink
- Create a front-end for your document collection
- Integrate indexed items with imported and items you've created in DEVONthink

Continue to read here:

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

WORKING WITH MEDIA FILES

While DEVONthink excels at handling text-based documents, it can also contain multimedia files such as images, audio, and video.



While not designed to replace Photos or Music, DEVONthink can be used as a repository for media files, whether for nostalgia, business, research, or any other project-related purpose. View and add images to documents, like rich text or

Markdown documents. For a more visually appealing view of images, you can use set the item list to *View > as Icons*.

You can play audio and video with Apple's familiar controls. Combine the audio-visual files with an annotation files and you can take notes as it plays back, including the ability to add timestamps for easy, future navigation in the playback. And yes, you can also just play a song in the background, if you'd like!

Two of the most powerful media features in DEVONthink are the integration of AI speech-to-text transcription and image analysis. Your audio or video files can be converted, automatically or on-demand, into a transcript of the text. So you can convert and read your sermons, lectures, speeches, sound bites, etc. With your images, you can ask your AI engine to tell you about an image, whether asking for a description of it, wondering what a foreign sign says, or requesting a story idea based on it.

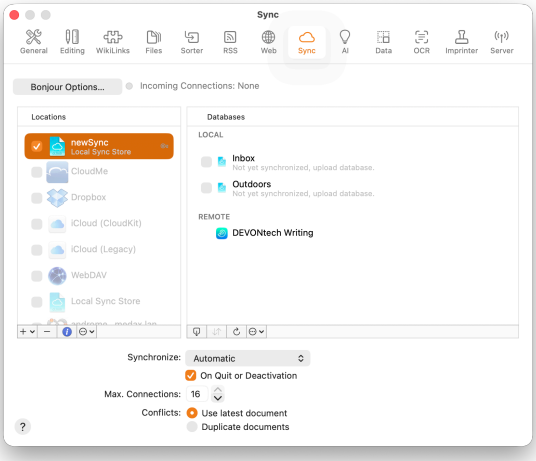
Possible uses:

- Create a dedicated database of images
- Create media rich documents
- Include project-related images, audio, and video in your databases
- Play your music from within your work environment

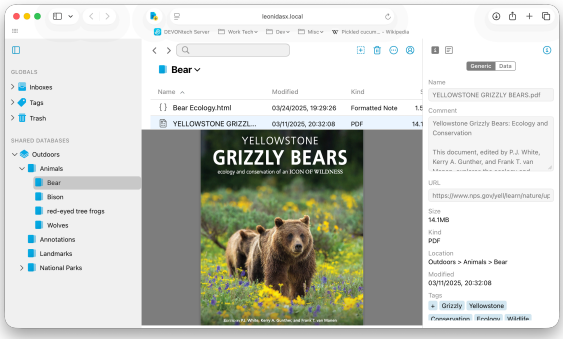
Continue to read here:

- Transcribe your audio-visual files
- Use your images, audio, and video

SYNC AND SHARE



Having multiple Apple devices is so common, it feels more unusual when someone has less than two. If you're running DEVONthink on more than one Mac, it's likely you want to access the same documents on both. DEVONthink helps keep a local copy of your database on multiple Apple devices in sync with each other. Changes made on one machine propagate to the others. The sync doesn't require using a cloud service, though that may be an option, but can usually be handled locally and privately. It also can include encrypting the sync data as it's sent and stored, adding one more layer of privacy.



In a business, academic, or even a group collaborative setting, you can share a DEVONthink database. With the built-in

web server, provide controlled, per-database access, even in a cross-platform environment. Ideal on a local network, with some technical know-how, you can even share over the Internet.

Possible uses:

- Use your database in a multi-device situation, having the same documents and metadata on each
- Use our mobile application, DEVONthink To Go, as a companion to DEVONthink
- Give other users access or collaborate on a database on other platforms

Continue to read here:

- Keep the database on your devices in sync
- Use DEVONthink's web server to share your database

DOCUMENTS

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As DEVONthink is an information and document management application, it supports importing many different file types. In this chapter we cover commonly used interface elements, how AI works with your documents, and specific details about the kinds of documents you can work with in your databases.

GENERAL

DEVONthink is made for documents. It's powerful internal AI, reads, indexes, analyzes, and stores information about each document added to your databases. But it not only provides solid storage and organizational features, it also lets you create certain types of documents directly in a database. While not intending to replace bespoke applications, like Pages, etc., for many people, in many situations, the convenience of integrated document creation makes DEVONthink a central hub for their work and lives.

Let's take a quick look at the parts of the interface you'll commonly use when viewing or editing your documents.

VIEW/EDIT PANE

The *view/edit* pane is where you can see or edit the current document (with compatible files). Whether you're journaling, annotating, planning, or even just reading, this pane is where you'll likely spend a lot of time.

NAVIGATION BAR

At the top of the *view/edit* pane, DEVONthink is the *Navigation bar* with information about the selected document. Which tools are available depends on the type of the document you are viewing. The options below are shown in the *Navigation bar* for most file types. Specific options are shown in the separate sections throughout this chapter:

- ‹ Navigates back to the last visited document after following a link.
- › Navigates back to the next visited document after going back.
- ↻ Reloads the displayed page in a web view. Only visible for, e.g., bookmarks.
- ⚙ Shows an action menu with options for opening the shown page in Safari, copy its address, or capture the page in a variety of formats.
- Shows if the document is locked or editable.

- Scrolls to the previous highlight, e.g., a search term occurrence.
- Scrolls to the next highlight, e.g., a search term occurrence.
- Scrolls to the next page of the displayed document.
- Scrolls to the previous page of the displayed document.
- Switches to *Text Alternative* mode. Useful for selecting text in uneditable formats, e.g., Word documents.
- Switches to *Best Alternative* mode. For Markdown documents, this is the rendered HTML view.

- **Word Count:** Shows the number of paragraphs, words, and characters of the displayed text.
- **URL:** Shows the URL associated with the displayed item, if one is present. If a PDF annotation is selected the URL field shows the associated URL if available. Click to launch the URL in its default application. Hold the ⌥ Option or the ⌘ Command key to open the URL in a new tab. Holding ⇧⌥ or ⇧⌘ opens the URL in a new tab and selects it.
- **Page Count:** Shows the number of pages as well as the page number of the currently displayed page. Click the page number in PDF or PostScript documents and enter a page number to jump directly to that page.

EDITING BAR

For some formats, e.g., rich text or sheets, there is another bar available: the Editing bar. If you click this icon , the editing bar will appear in place of the Navigation bar. This offers quick access to some editing tools related to the file type you're working on. See the appropriate file type section for more info.

TAG BAR

The Tag bar appears under the *view/edit* pane and shows all the tags associated with the document. Just click into the bar and start typing. Any potentially matching tags will be suggested. The suggestions come from the current database unless you're in the *Global Inbox* where suggestions come from all open databases. When you type the name of a tag, DEVONthink offers automatic completion. Choose an existing tag with the mouse or the arrow keys and press ↩ Return or Enter to accept it. Press ⎋ Escape to ignore the suggestion. Press ⇥ Tab to enter another tag. You can remove a tag by selecting it and pressing the Backspace or ⌦ Delete key to remove it. You can toggle the *Tag bar* on or off via the Tags toolbar button.

If you have multiple items selected, tags will only appear in the Tag bar if all items have all the same tags. However, it's still possible to add tags to all the selected items.

CONTEXT MENU ITEMS

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

appendix. Format-specific context menu commands are listed in their respective sections in this chapter.

TOOLBAR

In addition to creating documents via the *Data > New* or *Data > New from Template* submenus, you can also quickly make new ones via the New ⊞ button.

VERSIONING

As we compose our documents, things happen. We click on the ⌦ Delete key accidentally and wipe out several paragraphs. Or we may stop and wonder if an earlier edit sounded better or made more sense. Enter the *Versions* inspector, where you can jump back to a document's previous states without having to manually create a separate file on your own.

Versions are enabled on a per-database basis in the *Database Properties*. As you make edits to a document in DEVONthink then save it, a version is preserved. If you need to view or restore a previous state, you'll find them in *Versions* inspector. Selecting a previous version temporarily changes the contents in the *view/edit* pane. Restore it, choose another version, or click an empty area in the inspector to revert to the current state. You can also find these commands, and options to remove one or all versions in the context menu.

Make sure to open the *Files > General* settings to set the parameters for your versioning. Versions do consume space in your database so you'll want to make wise choices in the allowable number of versions per document, the maximum size each version can be, and the how long they're kept in the database. This is something you should be especially aware of when using an encrypted database. If you check out the *Database Properties* for your database, the number of versions isn't included in the various document counts. However, they are listed with their combined space in the database *Totals*.

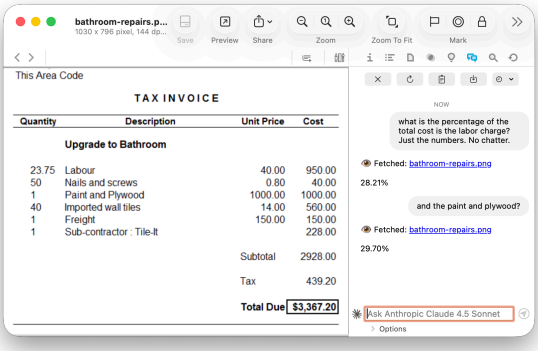
> Note: Versioning only applies to edits made in DEVONthink, not those made in external applications. Documents are automatically saved every five minutes after the last modification, when deactivating the window, or when quitting DEVONthink. And if it has been less than two minutes between saves, a new version will not be produced.

While every file format has its own strengths (and weaknesses), you can likely find a type suitable for your purposes. Each of the native types, and how DEVONthink handles other file types, are described in the subsequent sections in this chapter.

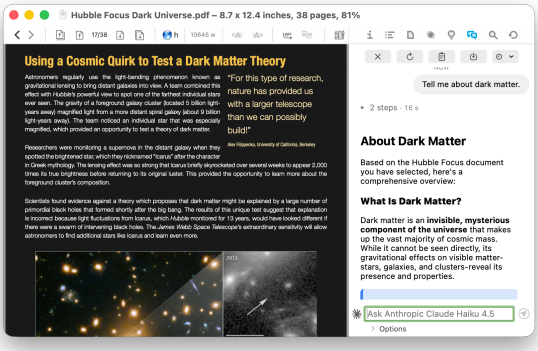
AI AND YOUR DOCUMENTS

DEVONthink is focused on document and information management. AI is all about document analysis and generation. These facts make for an excellent cooperative relationship between the two. While AI is implemented in several other aspects of DEVONthink, let's take a quick look at how it works with your documents, including some practical examples.

DOCUMENT ANALYSIS



Broadly speaking, if you have a document in your database, you can use AI to analyze it. This could be content in a PDF document or a selection of rich text files. Say you have an invoice and a tools-compatible AI engine, you can ask questions about the contents. For example, you can ask how many widgets were purchased. You can then ask for a breakdown of the cost per widget, their percentage of the total cost, or any other questions for which you need answers. If this was an anticipated order, you could ask for it to provide the cost for different quantities. As you progressively ask questions, the AI will take previous parts of your conversation into consideration when it answers.



Examining an invoice or receipt focuses very narrowly on its contents, typically requiring no outside information. But when generating responses about other documents, the AI engine may need to refer to other sources. To give you more control over where AI is getting its answer, you'll need to set permissions for what AI can access in the *AI > Chat* settings. For example, if you want it to use online searches, set it here.

Imagine you have a PDF about the Hubble Space Telescope and ask chat, `In this document, what happened in 1995?`. The response may include links within the document or it some extra commentary with interesting information. You could then follow up with a question like, `Using other resources, how does Hubble compare to the James Web Telescope?`. This "gives permission" to the AI to consult other sources, like Wikipedia or online searches, for its response. Utilizing both the document and online resources can prove to be a very powerful combination in research and learning about documents in your database.

"Translating" jargon or high-level language is another useful function. For example, say you have a PDF from PubMed but much of it is beyond your understanding. Select some text, open the *Chat inspector* and ask for an explanation in layperson's terms. And while it may not be wise to use this to make important decisions, e.g., medical or legal ones, it could help you understand the essence of the text.

> Note: The responses vary per AI engine, e.g., ChatGPT versus Claude, but can also vary per-model. Temporarily change to a different engine in the dropdown next to the query field if you'd like to try for a different response. Note the more

> expensive models sometimes produce more in-depth and thorough responses, but the Chat assistant always opens to the default model you've chosen in the *AI > Chat* settings.

SUMMARIZE AND TRANSFORM

Summarize: Summarizing is an excellent way to quickly get the essence, the core concepts, of a document. Using the *Edit > Summarize via Chat* command or clicking the button in the *Navigation bar* opens the *Summarize popover*. This provides a simple analysis of a selected document, which you can save directly into a Markdown or rich text document. You can also query multiple selected documents when using the *Summarize Documents via Chat* command, with the key points broken down by document. Additionally, you can use the `summarize content of` AppleScript command in your automations.

Transform: Logically, if you can edit the contents of a document in DEVONthink, you can also transform the text. Use this to rewrite content in a different style or tone. Select some text in a document then open the *Transform popover* via *Edit > Transformations > Transform text via chat* or press the button in the *Navigation Bar*. If you like the recommendation, you can replace the selected text with the click of a button.

TEXT DOCUMENTS

There are many options for creating text-based documents with AI. From the *Chat popover*, you can ask a question and tell it to save the results as a Markdown document.

Some AI engines, e.g., Claude, will often produce an appropriate document type on its own. For example, asking for a list of 25 European songbirds, including their common and scientific names, and notes about their migration patterns will likely result in a Markdown document. But you could also tell it to create a sheet, if that better suits your purpose.

You may also find use in one of our AI-directed templates. With the *Research Overview* template, provide a topic for AI to research and you'll get the response delivered in a document. Or select an image and use the *Story Assistant — Markdown* to generate a story outline based on the contents of the image.

Built with powerful automation features, DEVONthink can create documents with smart actions and AppleScript commands. Using your documents or queries as a starting point, you can use AI replies to create documents with more personalized and fine-tuned control.

IMAGES AND MEDIA FILES

Images have always been supported in DEVONthink but in more of a supportive role, e.g., as an illustration in rich text, etc. Within DEVONthink, AI has opened new possibilities for them.

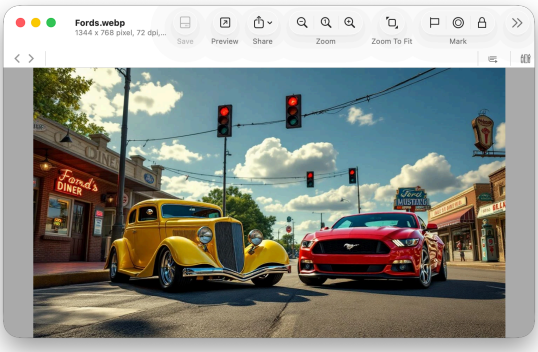
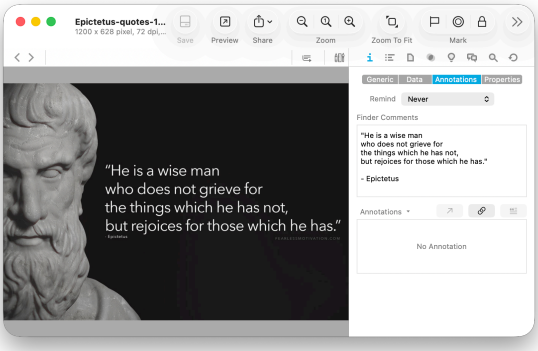


Image Generation: Open the *Generate Image* panel. Fill in a description of the image you want, including as many details as you have. Choose the generative image engine you have access to and let the AI create an image for you. Or perhaps you have a document with an outline or a synopsis of a story. Select it and choose the *Short Story — Illustration* from the *Data > New from Template > AI* menu. AI will "read" your document and create an image based on it. And if you're a scripter, there is an AppleScript command to create images with AI with more control in using the output, e.g., linking it to a Markdown document.



Analysis and Recognition: The *Edit > Summarize via chat* can analyze and provide a description of an image's contents, e.g., as bullet points or a paragraph. You may even be able to get information about the subject of an image. For example, use the *Chat > Geolocate Image* script on an image of the Eiffel Tower. Obviously this would work best with well-known or often photographed landmarks.

Images also can be converted to text via *AI transcription*. Using the *Recognition > Transcribe Text & Notes* command in the *Data* or context menu, AI can examine an image and extract the text much in the way OCR does, but utilizing either Apple's Vision framework or a vision-capable *AI model*. With an appropriate prompt and capable model, you can use this for a variety of purposes, including translating between languages.

Speech to Text: Another powerful AI recognition function in DEVONthink is speech-to-text capabilities used with audio and video files. Long ago, this technology was a niche (and expensive) process that progressed to providing conversion of short bits of audio directly on your Mac. Now, the technology is capable of fully transcribing long audio and video content, providing a written transcript for you to use as you need. And with Apple's Speech framework, this can even happen on your Mac.

After having set your desired options in the *AI > Transcription* settings, select an audio or video file and choose *Recognition > Transcribe Speech* command from the *Data* or context menu. This will process the audio and convert it into text. Logically, the longer the document, the more time is required to transcribe it.

When transcribing images and media, it may appear nothing has happened. However, you need to look at where the transcribed text is being saved. In the *AI > Transcription* settings, you will find these options:

- **Searchable Text:** This functions similar to Apple's Live Text feature in that it recognizes the text but doesn't modify the actual file. The transcribed text is stored in the database's index and associated with the file, allowing for toolbar searches and *See Also and classification*, just like OCR'd documents. And even though there is no embedded text layer, *in-document searches* are still possible.
- **Comment:** The extracted text is stored in the document's *Finder Comments*. While this can't be used for in-document searches, you can still use the `comment:` search prefix for toolbar searches. Using the Finder comment also lets you access the extracted text in a more visually intuitive manner. Bear in mind, the Finder allows a very limited number of characters in a Finder Comment. However, DEVONthink supports storing much more text internally.
- **Annotation:** Storing the recognized text in an external *annotation file* may be a useful way to examine the text isolated from the original image. The annotation file can be edited and used in whatever way you need to, but it remains associated with the original image.

Transcribed text may also contain timestamps, if you're transcribing to Finder comments or an annotation file. Timestamps can be toggled on or off via the *Add timestamps to transcriptions* setting.

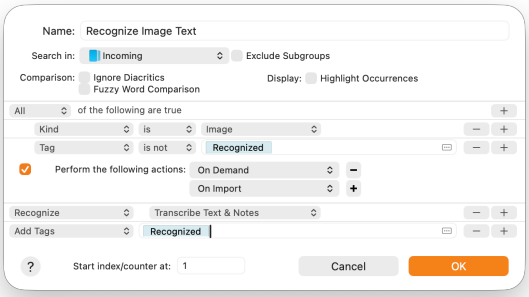
When transcribing to an annotation file, you can use them to jump to certain points in the playback. Be aware timestamps are inserted after short pauses in the audio, not periodically, so they may not always appear in a place you would put them.

> Note: The recognized text may not be 100% accurate, especially when using local Apple Speech but it may also be more than sufficient for your needs. However, you may not want to send video to Apple's or OpenAI's servers for processing.

TAGGING

Lastly, if you often use tags on your documents, AI can provide assistance with it. With the *Add Chat suggestions to documents* option in the *Files > Tags* settings, AI can examine files and tag them as they're added to your database. To keep your tags from getting out of control, you can require AI to only use already existing tags. You can also use Apple's Vision framework for tagging images, if you aren't using a vision-capable AI engine.

CONTROLLED RECOGNITION



As mentioned above, the option to recognize text in images may be very useful. However, the option in the *Files > Import* settings is

a global setting, meaning it will attempt to recognize text in every image you add. Not only may that not be necessary, it could incur a cost if you're using a commercial AI engine. However, we can exert a more control with a simple smart rule.

1: Select your desired database or location in the *Navigate* sidebar then click the + button at the bottom of the pane and choose *New Smart Rule*.

2: Enter a name and ensure the *Search in* dropdown is targeting the correct location.

3: Set criteria `Kind is Image` and enter another filtering criteria, e.g., `Tag is not AI Processed`. This latter criterion can help avoid reprocessing documents.

4: Click the + button to add an `On Import` event trigger. This is optional but adds some unattended automation to the database.

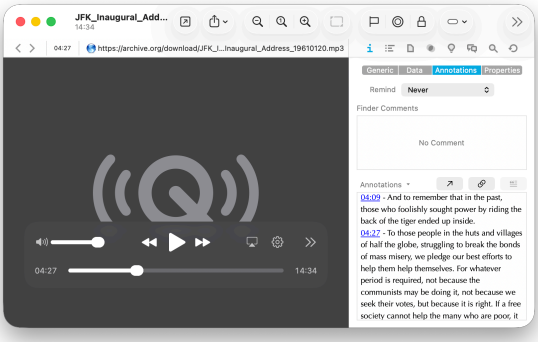
5: Choose the `Recognize` action and `Transcribe Text & Notes`. Following our example, add the `Add Tags` action and enter `AI Processed` as the Tag. Then press *OK* to close it.

6: Now drag and drop an image into the database. It should be transcribed automatically per the option you chose in the *AI > Transcription* settings.

Lastly, drag and drop an image into another database and you'll see it doesn't trigger the smart rule. You could also add other filtering criteria, e.g., `Name begins with screen` to only process screen captures you've taken. Now you have much more control over when transcription happens, saving computer resources and potentially some money.

PS: This same logic can also be applied if you want to use AI-assisted tagging on import.

SPEECH-TO-TEXT



On Location: Imagine you're in school listening to a lecture, in a house of worship, attending a seminar, etc. You wish you could record and read what's being said later. Here's a way you could accomplish that assisted by AI. The first two steps are only for setup. Once they're set, you can leave them alone and just start at step 3.

1: Open the *AI > Transcription* settings. Choose the transcription engine and how you want to store the transcribed text. We'll choose *Annotation* to create a separate annotation file.

2: Optionally, open the *Files > Import* settings and enable *Transcribe Audio Files*. We'll enable it for this example.

If you don't enable the option to transcribe on import, you can process the saved audio file later via the *Data > Recognition > Transcribe Speech* command or the context menu.

3: Open the Sorter's *Voice Note* view and start recording.

4: When finished, stop the recording. Choose the destination, modify any metadata, e.g., the name or tags, and press ⌘S or the *Add* button to save the audio to your database. The transcription engine should automatically start processing the audio.

5: Navigate to the destination and check the results, if finished. Note the length of the audio determines how long it takes to process, so be patient.

On Demand: If you have a pre-recorded audio file, you can process it even more simply. Assuming steps 1 and 2 are set as needed, drag and drop the audio file into your database. It will be processed in the same way.

> Note: Recording may not be allowed, or it may even be illegal, in certain locations.

We hope this provided a bit of insight, direction, and perhaps inspiration, into how AI can be effectively used with your documents.

DOCUMENT LINKING

Documents in DEVONthink 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 supports three types of links.

LINK TYPES

Relative and Absolute Links: Almost 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`. It is possible to manually add these links to an HTML document, but that is certainly less commonly done in DEVONthink. In regards to Markdown, you can read more about linking in the Markdown section of this chapter.

WikiLinks: WikiLinks are a way to create interconnected documents in your databases. When enabled, DEVONthink attempts to detect other documents matching the words you've typed in plain text, rich text, or Markdown documents. This creates an active hyperlink to the detected item, allowing you to quickly jump to it by clicking the link in the document. WikiLinks can be used in plain text, rich text, and Markdown documents. Use them to link to existing items or create documents on-the-fly. For existing items, these links are automatically detected depending on the method chosen in the *WikiLinks* settings. If a matching document 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. If you enable *Update name of WikiLinks in square brackets automatically* in the settings, the link text in a document will update if you change the name of a WikiLinked item.

Square bracket WikiLinks support using a description as an alternate name in Markdown. The description comes after a pipe `|` character, e.g., `[[fw4.pdf|W4 Tax Form]]` displays as "W4 Tax Form" but links to the "fw4.pdf" file. They also support section anchors following a hash symbol `#`, e.g., `[[Choosing a`

`Mac.html#workrequirements]]` jumps to a "Work Requirements" section in the linked document.

Note WikiLinks are not item links, which are discussed next.

Item Links: Many applications today have a URL scheme — a special URL that provides some extra functionality for that application. In DEVONthink, every item 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.

Item links are either incoming and outgoing links. The two types of links function as sides of one operation. If you create an item link to an image, the file will have an outgoing link detected. The image you have linked to will have an incoming link detected since the file has a link pointing to it. Documents with these links will have a special property icon displayed to the right of the filename in the item list. You can display a sortable *Incoming Item Links* and *Outgoing Item Links* column in the headers of the item list in List view. There also are incoming and outgoing item link criteria usable in toolbar searches, smart groups, smart rules, and AppleScript.

Similar to the behavior of WikiLinks, the link text in a document can be updated automatically when you rename a linked document. Enable the *Update name of item links automatically* in the *WikiLinks* settings. If this is disabled, you can use the *Tools > Item Links > Update Name of Item Links* command to manually update a document. To switch from WikiLinks to item links in a document, use the *Tools > Item Links > Convert WikiLinks to Item Links* command.

> Note: Item links also have some utility in automation, discussed in the Automation > Item Links section of this help.

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.

- **Crosslinks:** Item links added in documents are also known as crosslinks. You can very quickly insert them into plain/rich text or Markdown documents by typing >> followed by the beginning letters of an item's name. Note this will only match items in the current database, whereas the Insert Link popover can link to documents in any open database.
- **Make Link:** In rich text files, you can select words and choose *Format > Make Link* to create an active hyperlink of the selected words. Clicking on the hyperlink will generate a new WikiLinked document.
- **Add Link:** For text in rich text and formatted notes, you can select words and choose *Format > Add Link*. You can then add a URL, including an item link, to create an active hyperlink of the selected words.
- **Insert Link:** *Edit > Insert > Item Link* opens the Insert Item Link popover, allowing you to add an item link to a document.

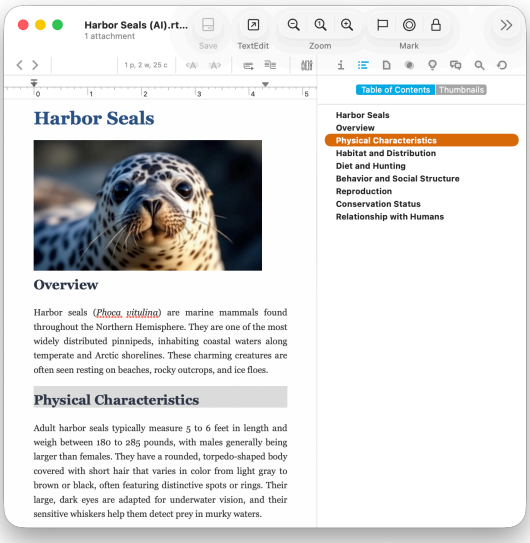
- **Drag and Drop:** You can Option-Command-drag and drop a file into a compatible document to insert an item link. This is an efficient way to insert links into rich text or Markdown documents.
- **Copy and Paste:** Select an item in the item list and choose *Copy Item Link*. This captures the item's 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 *Edit > Copy with Source Link*. This captures the text and a link to it. this can be pasted into other documents, potentially including documents in other applications. The opposite command is similarly powerful: *Paste with Source Link*. If text is on the clipboard and has a reference to its origin, use this command to paste into a document in DEVONthink. You should get the selected text and a reference to the original document, if available.

VIEWING LINKS

If you want to view the links in a document, open the Document > Links inspector. Outgoing links show item links from the current document to other documents or other URLs, e.g., to web pages. If you're viewing the source of a Markdown document, WikiLinks are not listed as outgoing links. If you want to see what documents are linking to the current document, those are listed in the *Incoming Links* section at the bottom of the pane. This section does include WikiLinks pointing to the active document.

Another inspector, the *Graph* inspector, can also show links between documents, including both WikiLinks and item links.

PLAIN AND RICH TEXTS



PLAIN TEXT

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

Plain text files can be created via *Data > New > Plain Text*. While they don't support formatting, they are often an ideal format for rapidly recording thoughts with less distraction. They are cross-platform,

including on mobile, and can be opened in dozens (if not hundreds) of applications. Another benefit of plain text is it can be easily processed in automations.

There are a large number of plain text file formats in the world. DEVONthink recognizes many of them and they should be editable just like standard `.txt` files. However, if you have a format that is not recognized, you can add the extension to be recognized as a plain text format. See the *Hidden Preferences* section of the Appendix on how to accomplish that.

RICH TEXT

Word processing applications brought us text with flair. Need some bold and italic text? How about adding a photo to the page? And color? These applications were providing it all. But their formats are proprietary so if you don't have the creator application, you can't open the file or you'll have to convert it first. The rich text format provides a useful text format that supports formatted text. These files are generally cross-platform compatible and editable in many applications. DEVONthink uses the same text engine found in Apple TextEdit, so it's an easy transition if you're already familiar with it.

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

Outlining: If you need to may lists in your rich text documents, there is a built-in "mini outliner" is a built into the text engine. On any blank line in a rich text document, type ⌥⇥ Option-Tab to create a bullet point (macOS shows dashes instead of bullets). Type something then press ↩ Return to create the next line item, and so on. Additional ⌥⇥ will increase the indentation; ⇧⇥ will outdent the line. Press ↩ multiple times to exit the list. Lists use a hyphen by default but you can change this via the *Format > List* dialog on a selected level of the list.

Annotating: Part of the popularity of rich text is the speed of composition but also being able to format with highlights, underlines, etc.

Sections: Another powerful feature of rich text is the ability to create sections and subsections. Especially useful in long-form documents, set a solitary line in bold and it will be detected as a section. A single line underlined acts as a subsection. But note these lines must be standalones and not mixed styles.

INTERFACE

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

Edit the formatting of a list.
Edit parameters of a table.

- Increase the size of the font.
- Decrease the size of the font.
- Set characters to be subscript.
- Set characters to be superscript.
- Adjust the line spacing of selected text.
- Set bold on the text.
- Set italic on the text.
- Set underlines on the text.
- Set strikethrough on the text.
- Highlight selected text. This uses the currently selected highlight color.
- Add or edit a link applied to the selected text.
- Convert selected text into an active link. This can be used to dynamically create Wiki documents.
- Show or hide the ruler. Place tab stops with the mouse, then remove them by dragging them off the ruler. Drag new tab stops (left aligned, centered, right aligned, or decimal aligned) from the repository at the right side to their desired positions on the ruler. Use the mouse to adjust the left and right margins and indent.
- Show the *Fonts* panel.
- Show the *Color Picker*.

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

- **Styles:** Select a predefined text style from the pop-up menu. To define your own styles, choose *Other* to open the standard macOS style editor. In the style editor, navigate back and forth through the styles of your document or the stored favorite styles. (Use the radio buttons to switch between document and favorite styles.) Click *Select* to select all occurrences of text with the displayed style in the document, click *Apply* to apply the style to selected text, or click *Done* to leave the style editor. To add a style from your document to the favorites, click *Add To Favorites*; to remove a favorite, click *Remove From Favorites*.
- **Font Controls:** Displaying three dropdown menus for, choosing the font face, font weight, and font size.
- **Colors:** Two buttons are available for setting the text and background color.
- **Basic Styling:** Allows you to choose bold, italic, or underlines.
- **Alignment:** Align the current paragraph (the one with the insertion caret inside) left, centered, justified, or right by clicking the according alignment buttons in the ruler.
- **Spacing:** Choose the desired spacing for the current paragraph from the *Spacing* pop-up menu. Choose *Other* to enter values other than the ones shown.
- **Lists:** Make the current paragraph a list (indented and with a bullet or numbered) by choosing the desired list style from the *Lists* pop-up menu. Choose *Other* to define your own list style.

Context Menu: In addition to the context menu items available with text selections, rich text files also feature these specific commands:

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

Inspectors: The usual inspectors work with both plain and rich text files, but there are a few inspectors that work with rich text:

- **Properties:** The *Info > Properties* inspector can display metadata on rich text files, like *Keywords*, the *Author*, or *Organization*.
- **Table of Contents:** If you read above about creating sections and subsections, the *Table of Contents* inspector is where you can view and navigate these sections.
- **Annotations:** Rich text supports highlighting, underlining, strikethrough, etc. You can view and access these in the *Document > Annotations* inspector.

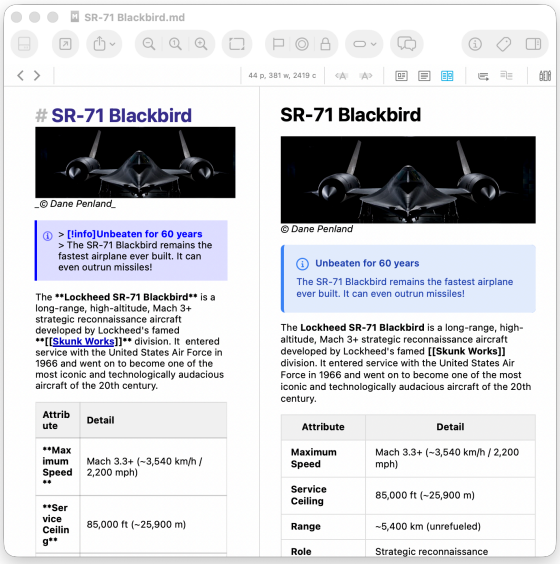
ITEM LINKING

In addition to the document's standard item link, plain and rich text files support this alternative item link:

- **Paragraph Link:** Link to the paragraph of the selected text.

Alternate item links are available in the context menu in the view/edit pane or when holding the Shift key while viewing the *Edit* menu.

MARKDOWN DOCUMENTS



Markdown is a simple formatting language invented by John Gruber and has only gained in popularity. It allows you to write in plain text, using some easily learned control characters, to produce nicely rendered HTML output. Created via *Data > New > Markdown text* or added from external sources, with some styling and ingenuity, you can create many kinds of documents.

EDITING

While there are many Markdown applications available, DEVONthink's editor is full-featured enough for many peoples' needs. Here are some modern functions to make your writing more pleasant and efficient.

As you're writing you can switch easily between three views, all chosen in the *View > Document Display* submenu. *Source* displays a plain text view for editing. *Preview* shows the rendered view of the page. And *Side-by-Side* displays the source and preview in two

connected panes. If there is a view you prefer, you can set it as the default in the *Files > Markdown > Markdown Display* dropdown.

Syntax Highlighting: When editing the source of the Markdown, DEVONthink's hybrid source rendering will display many types of formatting or elements as you type. For example, typing `**important**` will display the plain text in bold; `` `{"name":"Audrey Hepburn"}` `` will display as a code block, etc. If you'd prefer to never see formatting in the source code, you can disable *Syntax Highlighting* in the *Files > Markdown* settings.

WYSIWYG Editing: Another feature of syntax highlighting is live previewing of tables, images, links, and MathJax equations. This displays these items in the source code, similar to how it will be rendered in the preview. An example of this is shown in the image at the top of this section, where you can see a WYSIWYG image, link, and table. You can enable this globally in the *Files > Markdown* settings or toggle *Format > WYSIWYG Editing* on a document-by-document basis. Note this feature requires syntax highlighting to be enabled in the application settings.

In WYSIWYG mode, you still can edit these live elements in the source. Some even support click-to-edit, so you click, make a change, then the element dynamically renders again when you click away from it. Here are the current methods:

- **Image:** Control-click and choose *Edit Image*. Modify or remove the caption, change the image by modifying the URL, or add optional parameters, e.g., `width=250px`.
- **Link:** Click next to the link to display and edit the raw Markdown link's text or URL. Alternatively, Control-click and choose *Edit Link* or select the text and use *Format > Edit Link* to modify the URL but not the link's text.
- **Tables:** Click in a cell to edit the contents. Click directly under the rendered table and you can add another row. Or Control-click anywhere in the table and choose *Edit Table*. The raw Markdown table is shown.
- **MathJax:** Click an equation in the text to display and edit the raw MathJax/LaTeX Math equation.

Typewriter-like Scrolling: A feature used by some other writing applications is typewriter-like scrolling. This keeps the current line you're editing in the middle of the page.

Linking Documents: To create links in your Markdown documents, you can use linking methods described in the Document Linking section, e.g., WikiLinks, cross-links, etc. But there are also special behaviors when you drag and drop or copy and paste documents in your database into Markdown:

- Adding an image automatically inserts a valid Markdown link, e.g., `![piglet](piglet.png)`, depending on your

application settings or the location of the image.
- Copy a document in your database. Pasting it into your document yields a valid Markdown link with an item link.
- Drop MP3, MP4, or PDF documents to insert a playable multimedia link via a special transclusion link, discussed below..

Organizing Your Linked Images: If you are including images in your Markdown documents, keeping them organized can require creating groups to contain them. There is a function in the settings to help make this easier and more automatic. In the *Files > Markdown* settings, enable *Import images to group*. Below that is a text field with *Assets* as the name. Now images you drag and drop or copy and paste images into the document will be automatically filed in an *Assets* subgroup in the same group as your documents, all properly linked. (For many years, this has been a tried-and-true filing method for web content.) If you clip documents as Markdown, downloaded images will also be filed in this group. You can change the name in the settings, as needed. And if you want to create the group in a different location, you can read about the link syntax in the Appendix > Markdown Explored > Linking section.

File Transclusion: A special feature of *DEVONthink Markdown* is file transclusion. This creates a special link to display the contents of one file inside the contents of a Markdown document. This supports displaying the contents of: plain text, rich text, HTML, formatted notes, sheet, or more commonly, other Markdown files. For example, imagine you wrote several chapters of a book in individual Markdown files. Using transclusion you can view and arrange them as if they're one document, all without needing to merge or copy and paste content between files.

To use transclusion, just enter the desired document's name or item link between double braces, e.g., `{{Chapter 1}}`. Transclusion supports filenames with and without extensions, relative and absolute links, as well as item links. It also supports the Obsidian syntax, e.g., `![[Chapter 2.md]]`.

Markdown Extensions: To support some features in Markdown that aren't built in, DEVONthink supports a handful of known and widely used extensions. The first option below requires no user interaction. The following three can be enabled in the *Files > Markdown* settings: Mathjax for rendering equations and formulae, Mermaid for creating diagrams, and Lea Verou's Prism for syntax highlighting code.

LaTeX Exports: LaTeX is a typesetting engine very commonly used in scientific and academic circles for creating documents in a very precise and controlled manner. With a Markdown document selected, choose *File > Export > as LaTeX Document* to create a `.tex` file, the native LaTeX format, to be used elsewhere. Links are preserved, any linked images are exported to the same location as the document, and metadata such as title, author, and date are retained.

If you need to create a finished document, export *as PDF Document (LaTeX)*. The document includes images and active hyperlinks, ready for submission. Exporting multiple Markdown documents yields a

combined final PDF document. Note you will need to have `pdflatex` installed in order to export to PDF. A local installation of MacTeX will put the required pieces together to effectively use this export option.

> Note: If you're interested in composing in Markdown, the Appendix > Markdown Explored section will help you get started. While not exhaustive, it covers a wide range of elements supported in *DEVONthink Markdown*.

INTERFACE

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

Editing Bar: The Editing bar is only available when editing the source. It has a subset of the tools used in rich text editing, e.g., *Highlight*, *Bold*, etc. However, there are also some specialized buttons for handling Markdown lists and tables.

- Create a list at the cursor or from selected text. Supports ordered (numbered), unordered (bullets), and to do lists. You can also change the list type dynamically or clear the list markers from the text.
- Create a new table at the cursor location by dragging in the grid picker, defining the rows or columns needed.
- Insert a new row in a table below the current one.
- Duplicate the current row in the table.
- Delete the current row in the table.
- Insert a new column in the table to the right of the current column.
- Delete the current column from the table.

Inspectors: These inspectors provide navigation or a view into the resources in Markdown documents:

- **Table of Contents:** You can view and navigate your Markdown sections in the *Table of Contents* inspector.
- **Annotations:** Markdown highlighting, underlining, strikethrough, etc. are shown in the *Document > Annotations* inspector.
- **Links:** Excluding WikiLinks, many types of outgoing links are shown in the *Document > Links* inspector, including item links, web URLs, other URL schemes like `mailto:`, etc.
- **Attachments:** Images added to the Markdown document are listed in the *Document > Attachments* inspector.

Context Menu: Markdown documents support the same context menu items available with text selections in the document source. But there are a few special commands available both in the source and preview:

- **Copy/Reveal/Edit…:** Copies or reveals a linked document or opens it for editing.
- **Set as Thumbnail:** Use a Control-clicked image as the document's thumbnail.

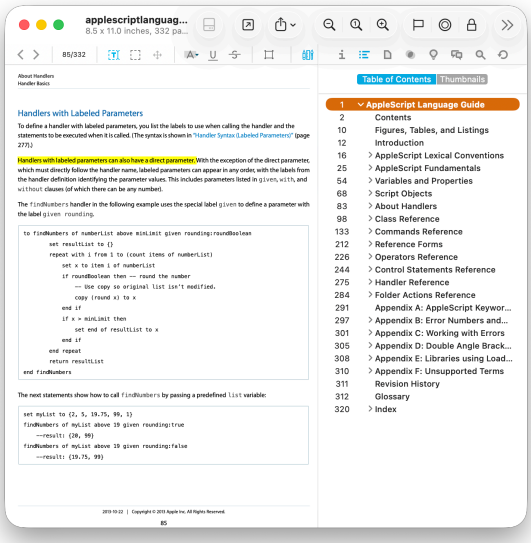
ITEM LINKING

In addition to the document's standard item link, Markdown documents support this alternative item link:

- **Section Link:** Links to the section, e.g., an `h1` header, of the selected text.

Alternate item links are available in the context menu in the view/edit pane or when holding the Shift key while viewing the *Edit* menu.

PDFS



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

Beyond importing and indexing, PDF files can also be created by capturing web content, directly in DEVONthink or via our browser extension, *Clip to DEVONthink*. You can also print a paginated PDF with the Save PDF to DEVONthink in the *PDF* dropdown of the print dialogs of most macOS applications.

PDFs often come directly from text sources, like word processing or page layout applications. The content of these files should be indexed and searchable when added to your database. But there are also times when a PDF only contains pages of images, e.g., PDFs made from scans of old books. In a process similar to Apple's Live Text, DEVONthink will detect and index the text transparently, allowing you to search for these documents. However, you will not be able to use the *Search* inspector and see occurrences of search terms in the found documents as there is no actual text layer present.

OCR: Even if PDF text is detected internally, we strongly recommend you use OCR to create properly searchable documents. OCR adds a text layer to the document, allowing search hits to be shown in the *Search* inspector. That text layer is a permanent part of the document, so it is preserved when using it outside of our application, or even across platforms. For scanned PDFs without a text layer, you can *do OCR* directly in DEVONthink when needed.

Viewing PDFs: When you view a PDF it will display as single or two side-by-side pages. Choose the desired option in the *View > PDF Display* options. When the document opens, the pages are viewed as the entire

page or magnified to the width of the view/edit pane. You can choose how the document is displayed in the *View > Zoom* submenu. If you'd like to always view PDFs with a specific *Zoom* option, you can set a default in the *Files > Multimedia > PDF Display* preferences. Enable *Automatically resize* then choose a single or double page option. The *Zoom* option used is controlled as shown below:

- **Continuous:** Zoom to Width
- **Non-Continuous:** Zoom to Fit

INTERFACE

Navigation Bar: Not only containing the typical properties like word count, with PDFs the Navigation bar shows the current page folio along side the total number of pages in the document. Clicking on this navigation bar item opens a *Go to page* function so you can quickly jump to a specific page. In addition, there are buttons to move to the first, previous, next, or last page. Also, you will see an icon if the document is encrypted. Also, if the document is read-only and cannot be edited, for whatever reason, you will see this icon.

Editing Bar: The navigation bar for PDF files includes the *Editing Bar*, providing access to editing and annotation tools. Click this and the editing bar will replace the navigation bar. You can also access them in the *Tools > Annotate* menu. The available tools are:

- Select text for copy or highlighting.
- Select annotations on the page. Double-click an annotation to edit its properties. Press the Delete key to remove the annotation.
- Move or scroll the current page.
- Underline selected text in the document.
- Strike through selected text in the document.
- Apply or remove highlighting on selected text. The highlight color will be the color selected in *Format > Highlight Color*. Alternately, click and hold to select another color.
- Add a link to a selected area. Click and drag over an area to establish a hotspot for the link to be active. For the *Link Type*, choose *Link within PDF*, navigate to another page and click *Set* to create a link between pages within the same PDF. Alternatively, choose *URL* and enter a URL to an external item. This can be a web site address, or drag files from the Finder or your DEVONthink databases into this field.
- Add a rectangle annotation.
- Add an oval annotation.
- Add a line annotation.
- Add a note annotation.
- Add a text annotation. Drag to create a text box. To change the font, choose *Format > Font > Show Fonts.*. Note only one font can apply to each text annotation.
- Rotate the current page left (counter-clockwise).
- Rotate the current page right (clockwise).
- Add a new blank page before the current page.
- Delete the current page.
- Reverse the page order of the document.

When using certain annotation tools, e.g., *Note* or *Link* annotations, the *Annotations panel* will open. You can set type-specific properties in this panel. The settings here will be retained for subsequent uses of each type of annotation.

Context Menu: In addition to many common context menu items, there are also a few PDF-specific commands:

- **Add to Reading List/Favorites:** Add the current page to the *Reading List* sidebar or the *Favorites* section of the *Navigate* sidebar.
- **Add to Table of Contents:** Adds the current page as a bookmark to the *Table of Contents*. This command is also available in the *Document* > *Thumbnails* inspector.
- **Automatically Resize:** When checked, the zoom factor adjusts to the width of the view/edit pane or document window.
- **Delete Annotation:** Deletes the selected annotations.
- **Single Page/Two Page (Continuous):** Displays the PDF as single or double pages. Use the *Continuous* option to allow quick scrolling through the pages as one continuous document.
- **Previous/Next Page:** Jumps to the previous or next page.
- **Rotate Left/Right:** Rotates the current page 90 degrees in the selected direction.
- **Insert Blank Page:** Insert a new blank page before the current page.
- **Delete Page:** Delete the current page.
- **Reverse Page Order:** Reverses the order of the pages in the entire document.

Inspectors: There are a few inspector panes with information specifically pertaining to PDF documents: *Info* > *Properties*, *Content* inspectors, and *Document* > *Annotations*.

- **Properties:** The *Properties* inspector displays PDF metadata from some third-party applications, e.g., Adobe Acrobat. It will display things like a title, copyright, author, and keywords, if available.
- **Content:** The *Table of Contents* inspector displays a PDF's table of contents, if one exists. You can navigate through the document with the section markers in it. The *Thumbnails* inspector displays page thumbnails of the PDF currently displayed in the view/edit pane. You can navigate the document via the thumbnails. You can also drag to rearrange the pages or even drag them out of the inspector to export them. Alternately, drag other PDFs into the inspector to merge one document into another. Commands for deleting or inserting blank pages are found in the *Tools > PDF* submenu. And the *Split Document* command becomes available in the *Tools* and context menus when you've selected a page thumbnail.
- **Document:** If you are annotating your PDFs, the *Document > Annotations* inspector is where you can see and manage the document's annotations. Edits made with the annotation tools mentioned above will appear here. You can also selectively delete annotations in this inspector. While not specific to just PDFs, the *Document > Links* inspector displays links detected in the content.

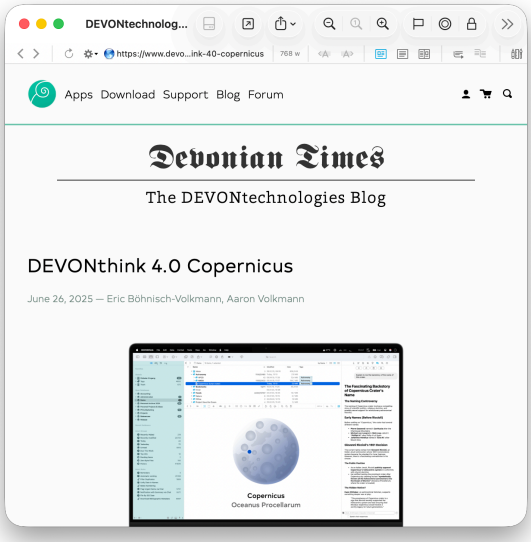
ITEM LINKING

In addition to the document's standard item link, PDF documents support these alternative item links:

- **Page Link:** Links to the current page.
- **Selection Link:** Links to selected text.
- **Annotation Link:** Links to a selected annotation.

Alternate item links are available in the context menu in the *view/edit* pane or the *Thumbnails* inspector. The alternate links are also accessible when holding the ⇧ Shift key while viewing the *Edit* menu.

HTML-BASED FORMATS



HTML-based files in DEVONthink include bookmarks, web archives, formatted notes, and RSS articles. These are formats that are viewable in web browsers and are also mobile-native, so they will work nicely in DEVONthink To Go too!

BOOKMARKS

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

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

> Note: If you import your bookmarks from a browser, this is a copy operation not a sync, i.e., if you modify bookmarks in your browser, this will have no effect on DEVONthink's contents. However, you can do another import to add the new bookmarks to your database without duplicating the previous ones.

One special feature available with bookmarks is the Reader view. Oftentimes popular news or informational sites have an article buried in a sea of advertisements, banners, and other distracting elements. Once such a page loads in DEVONthink, click the icon in the *Navigation Bar* and DEVONthink will load an isolated view of the article with the distracting elements removed by its Readability mechanism. If you want to capture the page, choose the desired format from the ⚙ button or the *Tools > Capture* menu.

FORMATTED NOTES AND HTML

Formatted Notes: Formatted notes are a simple web-based note format, like a mobile rich text format. These files can be viewed with most web browsers. Similar to their text-based counterparts, they support adding images and formatting text, though the range of formatting options is

smaller than that of rich text. You can find all available formatting commands in the *Edit* and *Format* menus. Newly created formatted notes use the font set in *Editing > Format > Rich Text & Note Font*. Captured or imported formatted notes, e.g., from Evernote, use the font set in *Settings > Web > Standard Font*

Images are embedded directly into the HTML code so that formatted notes are completely self-contained. However, the resulting file size can grow large very quickly. Resizing images before adding them is encouraged. The HTML code is also cleaned from unnecessary tags and an identifying meta tag is inserted that lets DEVONthink distinguish formatted notes from normal HTML pages. Form tags, e.g., for checkboxes and input fields are not removed and the status of checkboxes and form fields is retained.

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

HTML Files: HTML files are similar to formatted notes, however they do not preserve the state of certain elements, e.g., checkboxes and form fields. You also cannot add images by dragging them into the live editing view. However, you can edit the underlying HTML code using the *Source* and *Side-by-Side* modes found in the navigation bar. HTML files can be created via *Data > New > HTML page* or clipped.

Formatted notes can be created via *Data > New > Formatted note*. When using the *Notes from Evernote* or *Folders & Attachments from Notes* options in the *File > Import* menu, the imported notes are formatted notes.

WEB ARCHIVES

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

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

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

You can't natively create web archives files in DEVONthink. They are the result of web clipping, either in DEVONthink or using our browser extension.

RSS

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

RSS feeds are treated as a special type of group. Feed articles are downloaded to the feed and saved in a format you specify in DEVONthink's *Settings > RSS > Feed Format*. The default is *Automatic* and saves summary files as HTML. When using an option other than *Automatic* as the feed format, DEVONthink must download the linked content and convert it to the appropriate format. The styling of the HTML articles is controlled by an internal CSS stylesheet specified in *Settings > RSS > Feed Style Sheet*. Other formats will get their styling from the source they're downloaded from.

Add a new RSS feed via *Data > New > Feed*. Just provide a URL and an optional title. If you don't enter a title, DEVONthink will attempt to detect and use the feed's title.

INTERFACE

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

- Increase the size of the font.
- Decrease the size of the font.
- Set characters to be subscript.
- Set characters to be superscript.
- Set bold on the text.
- Set italic on the text.
- Set an underline on the text.
- Set strikethrough on the text.
- Highlight selected text. This uses the currently selected highlight color.
- Add or edit a link applied to the selected text.
- Show the *Fonts* panel.
- Show the *Color Picker*.

Context Menu: In addition to the context menu commands available with text selections in a document, HTML based files often include these items:

- **Capture ...:** Captures the Control-clicked frame, image, link to the inbox of the current database.
- **Capture Page:** Captures the current page in the selected format to the inbox of the current database.
- **Copy ... Address:** Copies the frame URL of a Control-clicked frame, image, page, or video to the clipboard.
- **Insert > ...:** Inserts checkboxes into the document.
- **Open ... in New Tab:** Opens a Control-clicked image, page, or video in a new DEVONthink tab.
- **Open Image in PhotoStickies:** Opens the image in PhotoStickies.
- **Open Page in Browser:** Opens the current page in your default web browser.
- **Open Page in DEVONagent:** Opens the current page in DEVONagent Pro.
- **Reload:** Reloads the page from the Internet.
- **Update Bookmark:** Updates the URL of this document to the current one, e.g., after navigating to a sub-page.

- **Update Captured Archive:** Updates the contents of a web archive file with the live version on the Internet.

- **Add Page to Downloads:** Adds the page address to the Download Manager.
- **Download Video:** Downloads the video using the Download Manager.

Inspectors: Beyond the standard inspectors, a few others have specific utility with these formats:

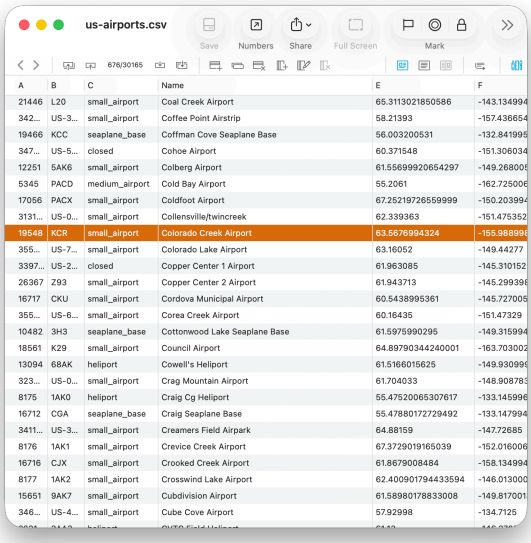
- **Links:** The *Document > Links* inspector is a great place to check out (and interact with) links in the documents.
- **Annotations:** If you are annotating any of these formats, the *Document > Annotations* inspector lets you see, select, and even delete annotations.
- **Properties:** For clipped content, certain attributes may be shown in the *Info > Properties* inspector, e.g., *keywords* or the page's *description*.

ITEM LINKING

Web-based formats support two specialized link types.

- **Selection Link:** Link to the paragraph of the selected text on a document, e.g., formatted note. This displays as highlighted text when the link is used. Note this is a cosmetic effect and not an annotation.
- **Copy Link With Highlight:** Available in the context menu for selected text when viewing bookmarks in DEVONthink, the passage is shown highlighted on the web page when the link is used.

SHEETS



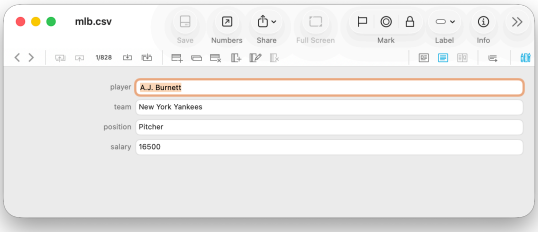
Sheets are a specialized format used to store and display tabular data. For example, a sheet could contain a table of peoples' name, title, and department, your software titles and licenses, or the bibliographic information about research papers you're working with. Sheets are made up of records, defined by parameters you specify, and displayed as a form or columns.

Sheets are created via *Data > New > Sheet*. If you import tab or comma-delimited files, e.g., CSV or TSV files, they will be imported and displayed as sheets. With these imported documents, you may need to define column headings, which you can modify at any time.

When you create a sheet or edit the columns via the *Column Editor*, you will specify the column name and their type. An explanation of these data types can be found in the Data section of the appendix.

Sheets can be displayed as a table or a form via the *View > Document Display* menu or using the and buttons in the navigation

bar. The table view is similar to standard spreadsheet views. Form view is similar to the record view e.g., in FileMaker. You can set the default view for sheets in the *Files > Sheets* settings.



Editing sheets works a bit differently than other formats. In Table view, click a cell to edit its content. To move to the next column, press the ⇥ Tab key. To finish editing and begin a new record, tap the ↩ Return key. This can make editing sheets a very quick process. In Form view, tabs and returns work more like other text-based formats. Add new and remove selected rows using the *Add Record* and *Remove Record* commands in the *Tools > Sheets > Add Record* menu.

When working with a sheet, columns with links are handled differently. For cells containing a *URL*, hold the ⇧⌘ keys and click the link to open it in an external application while switching to it. For cells using an item link, the same keys open the linked document in a new tab or document window, depending on the *General > Interface* settings.

INTERFACE

Navigation Bar: Above the view/edit pane, the Navigation bar displays the current record and the total number of records in the sheet. Clicking on this information opens a *Go to record* function so you can quickly jump to a specific record in the sheet. In addition, there are options to go to the first, previous, next, or last records.

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

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

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

Context Menu: There are a few sheet-specific context menu items available when you're Control-clicking in a sheet.

- **New Record:** Creates a new record in the sheet.
- **Duplicate Record:** Duplicates a selected record in the sheet.
- **New Column:** Creates a new column in the sheet.
- **Edit Columns:** Displays the *Column Editor* to allow editing and managing the columns.
- **Delete Records/Columns:** Deletes the selected record(s) or selected column(s).
- **Copy Item Link:** Copies the unique link to the document.
- **Add To:** Add the document to the *Favorites* or *Reading List*.

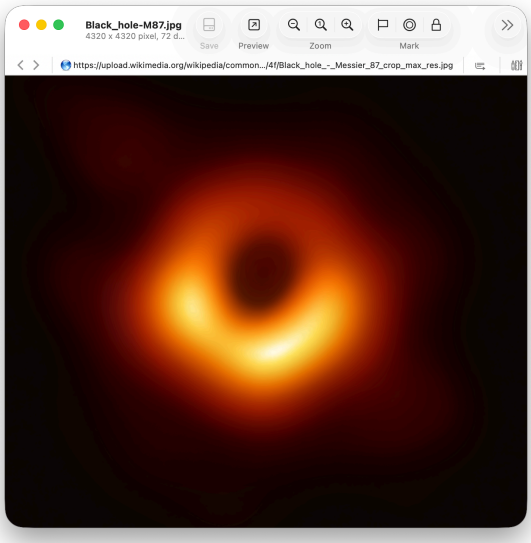
In *Table View*, there are also *Cut*, *Copy*, and *Paste* commands. Pasting always adds as the last record in the sheet.

ITEM LINKING

Sheets currently support no alternate item links.

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

IMAGES, AUDIO, AND VIDEO



While DEVONthink's strengths lie in text-based content, you certainly can add images, audio, and video files to your databases. You can even add new media documents via the *Sorter's* *Audio Note*, *Video Note*, and *Screen Capture* features.

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

INTERFACE

Navigation bar: The Navigation Bar has no special controls options for images. But for audio and video files, it displays the playback time. If you click the time it shows a *Go to time* function so you can quickly jump to another time in the playback.

Editing Bar: When viewing an image, the *Editing Bar* offers some editing tools:

- **Markup Tools:** Add marks to your image with the *Rectangle*, *Circle*, *Line*, and *Text* tools.
- **Rotation:** Rotate left or right 90 degrees or a full 180.
- **Flip:** Flip the image on its horizontal or vertical axis.

To the left are *Select* and *Move* tools so you can select and modify the image annotations or scroll the image. But be aware, these annotations will be flattened into the image when you save or deselect the image. They can't be removed at a latter time.

Edit pane for images: In addition to the Editing Bar's tools, double-clicking opens an edit panel with three tabs. The *Adjust* tab allows you to do some basic image editing, like adjust exposure, saturation, adding a sepia tone, etc. The *Effects* tab provides some simple pre-defined image effects. The *Details* tab displays metadata about the image, including EXIF metadata and a map of the geolocated origin of the file.

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

- **Rotate Left/Right:** Rotate the image left and right.
- **Flip Horizontal/Vertical:** Flip the image on the chosen axis.
- **Edit:** Opens the Edit panel for images.
- **Copy Image:** Copies the image or current video frame to the clipboard. When this command is used with an image, a `.tiff` file is created on the clipboard. These files can be quite sizable but are also lossless.
- **Set As Thumbnail:** Use the current frame as the thumbnail of the video while playback is paused.

ITEM LINKING

In addition to the document's standard item link, audio and video files support this alternative item link:

- **Frame Link:** Link to the current time of paused media.

Alternate item links may be available in the context menu in the view/edit pane or via the Action menu (gear icon) while the media is paused. The alternative command is also accessible while holding the ⇧ Shift key while viewing the *Edit* menu.

> Note: We sometimes get inquiries about including entire photo libraries in DEVONthink, e.g., from Photos, Lightroom, etc. While it's certainly possible to include images in your databases, please understand DEVONthink is not a digital asset management application. If you want to include some images on a per project basis, perhaps for journaling or genealogy, etc., that works fine. If you are trying to have an image archive, searchable by media-specific metadata, you'll be better off using an application built for this specific purpose.

OFFICE DOCUMENTS, EMAIL, AND OTHERS

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

EPUB

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

Navigate an `.epub` file in the *Content > Table of Contents* inspector or choose the *View > Document Display > Text Alternative* view.

When searching an EPUB file, the *view/edit* pane will switch automatically to the *View > Document Display > Text Alternative* view to display the search hits.

OFFICE DOCUMENTS

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

- Apple Pages (`.pages`), Numbers (`.numbers`), and Keynote (`.key`) from Apple's iWork suite
- Word (`.doc(x)`), Excel (`.xls(x)`) and PowerPoint (`.ppt(x)`) from Microsoft's Microsoft Office suite.
- Files from supporting applications, like the OpenOffice or LibreOffice suites.
- Files from the popular macOS Mellel word processor.

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

EMAIL

Imported email messages (`.eml`) have their contents indexed. This makes them searchable and a valuable asset, whether you're archiving email for personal or professional reasons. If the email contains indexable attachments, e.g., a rich text file or PDF document with a text layer, the content will be indexed and treated as part of the content of the email document. You can confirm this in the *Concordance* inspector. Note attachments like images, audio/video files, and PDF documents without a text layer will not be indexed nor processed, e.g., transcribed, as part of the import process. But they can be processed separately, as we'll see next.

Dealing with attachments: Attachments are included as part of the email; they are embedded and add to the file size. Separating the attachments allows them to be used independently, but be aware they will also consume twice the space – in the email and as a separate document. However, when separated they can then be made searchable or transcribed as needed. If you want to import them separately, do this:

- **Drag and drop in DEVONthink:** Select an email with attachments, then drag and drop an attachment to the item list while using the *View > Document Display > Text Alternative* view.
- **Drag and drop from an email client:** If you're not importing the email but only want the attachment, select it in the email, then drag and drop it to your database, the *Sorter*, DEVONthink's Dock icon, etc. This will work for Apple Mail and Outlook and will likely be allowed in several other email clients.
- **Import attachments automatically:** Enable the *Files > Emails > Import attachments* setting and the attachments will be

imported along side their containing emails. Note this will not group the email and its attachments. Be cautious with this as the global setting means ALL attachments will be imported from all emails being imported.

- **Import on demand:** If you want to control what attachments you want to import from specific emails, select an email and choose the *Tools > Import Email Attachments* command.
- **Mail Scripts:** In Apple Mail and Legacy Outlook, select an email with an attachment. Then in the global Scripts menu at the top of your screen, choose `Add attachments to DEVONthink` to import only the attachments or `Add message(s) & attachments to DEVONthink`. The latter command will group the email and its attachments together.

For more information on email importing see the In & Out > Handling Emails section.

OTHER FORMATS

You may be reading through this section and thinking, "Well, there are many more kinds of files than you've listed here. What about those?!" That is indeed true and the fact is you can likely put any kind of file into your database. But there are a few things to think about.

The first thing is whether there's a real benefit to putting certain files into DEVONthink. For example, it is possible to put `.zip` files in a database but they serve no functional purpose in they aren't indexed or searchable. It may make sense if it's just for archival purposes, but it would make less sense in an active database. The same would apply to build files, log files, temp files, etc.

The second thing to consider is whether you have two per-format components on your Mac: a QuickLook plugin and a Spotlight importer. These components come from third-parties, typically the developer of the format or an application that can edit it.

The QuickLook plugin generates a preview of a file and DEVONthink can use this to display the file. If there isn't a plugin loaded on your Mac, you will see a generic file icon.

If there is a Spotlight importer available for the file format you're adding to your database, DEVONthink may be able to use it to gather some information about the document. The kind and amount of information is dependent on how the importer was developed.

Two ways to improve the chances of getting at least a preview are: run native macOS applications and make sure the compatible application is installed on the Mac and has been launched at least once. That way a QuickLook plugin or Spotlight importer, if available, should be registered for specific formats on the machine.

TEXT AND BEST ALTERNATIVE

For some document formats, e.g., email messages or Word documents, DEVONthink only allows you to select and copy text in the *Text Alternative* view. If DEVONthink is able to interpret and convert the document format, you can use the  and  buttons in the navigation bar to switch between a

view that allows you to select, copy, and drag text or the Quick Look view showing a more "accurate" view of a file.

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

INTERFACE

Context Menu: Context menu items aren't available in Quick Look views, e.g., Control-clicking in a PowerPoint file. Also, when using the *Text Alternative* mode for these files, some but not all context items related to text selections are available. [](#appendix-contextual)

ITEM LINKING

No alternate item links are available for non-native formats.

LINKED FILES

On occasion we get an inquiry about importing files with linked assets, like Adobe Illustrator or InDesign files. While it's certainly possible to import these, the links will be broken if you try to import a folder structure containing the links. Groups in DEVONthink do not exist in the file system, so the groups that are created when you import a folder structure from the Finder don't exist as real folders in the database. The files inside the folders are imported into the internal structure of the database, so their paths are not pointing to the groups in the database.

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

IN & OUT

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DEVONthink is not an island. It integrates with the rest of your Mac and iOS devices in a variety of ways to make it easy for you to add data to DEVONthink. There are even some options that allow you to share your data with friends and colleagues. The first part of this chapter will discuss the various ways to get documents into your databases. This is followed by a section on the exporting options, with the remainder of the chapter discussing sync, in philosophy and practice.

IMPORTING & INDEXING

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

IMPORT

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

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

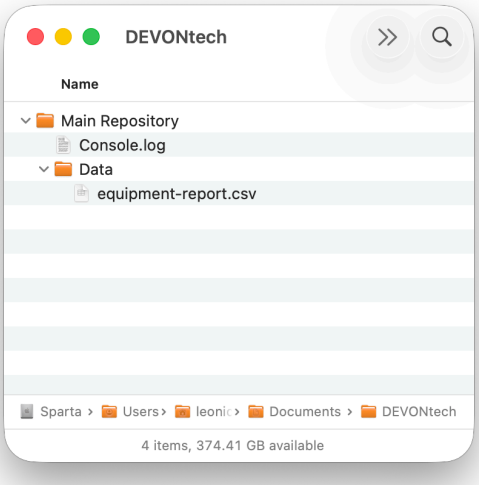
If you hold the ⌘ Command key when you drag into DEVONthink, the file will be moved, not copied, into the database. If you are using *File > Import > Files and Folders*, you can click the *Options* button and enable *Move Originals to Trash*.

INDEX

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

items. Do note while indexing doesn't copy the contents of the files, the full text of text-based documents is stored. This can still take up a considerable amount of space.

Finder files and folders can be indexed using *File > Index*. You can also hold ⌥⌘ while dragging and dropping into your database. When you do, you will see a curved arrow on the cursor while dragging, indicating the items will be indexed. Indexed items will have a small square Finder icon to the right of the item's name.



INDEXING AND THE FILESYSTEM

Indexing is not the default option for getting files into your databases. This is not only because importing creates a singular, portable database, but also due to some technical things that must be considered when indexing. Here are a few behaviors you should know and understand before indexing.

With indexing, the integration with the filesystem is very tight. When you rename a file in DEVONthink, the file's name changes in the Finder. If you rename in the Finder, the change should be automatically reflected in the database. DEVONthink tries to keep the group in the database and the folder in the Finder in the same state. Also, if you move a non-indexed file into an indexed group or create a new file in an indexed group, the file will be moved to the external indexed folder, a process we call "deconsolidation".

When indexing items into DEVONthink, you can index a file, a folder, or a parent folder containing subfolders. In the image shown, the "DEVONtech" folder is the parent folder and could be indexed with all its contents included. You could also index an individual folder, e.g., the "Data" folder, which would be treated as a parent folder for its contents. Or you could index individual files. Each of these options has specific behaviors you should be aware of, covered below.

Updating indexed files: In general use, DEVONthink can usually detect filesystem changes of indexed folders and will update the indexed group in the database. However, there are two things to be aware of regarding automatic updating of indexed files.

- **Files synced by other applications:** If you are indexing files in a folder synced by another application, e.g., iCloud or Dropbox, you may need to use the *File > Update Indexed Items* command to manually update the indexed group. DEVONthink does this to avoid causing a discrepancy in the data for the other

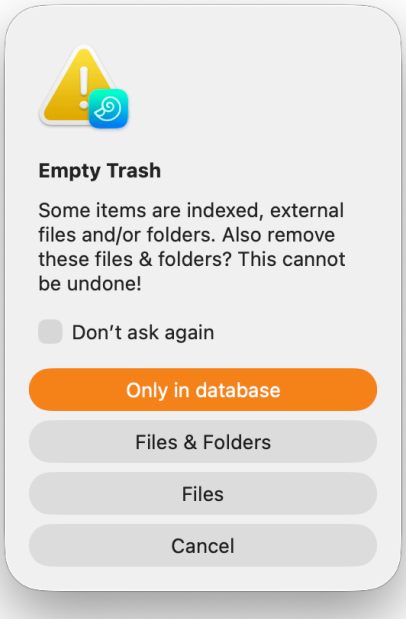
application. Also, a particular process may not generate a filesystem event for DEVONthink to detect a change has occurred.

- **Individually indexed files:** While it's certainly feasible to index individual files, be aware these files won't always be updated automatically. If you have an indexed file selected in DEVONthink and make external changes, the file will not show the changes in the view/edit pane automatically when you return to your database. In this case, use *File > Update Indexed Items* or reselect the document. You should then see the updates.

> Note: In the *Appendix > Hidden Preferences*, you will find some settings specific to indexing: *DisableAutomaticUpdatingOfItems*, *DisableFileSystemEvents*, and *DisableFileCoordination*. If you'd like to control whether DEVONthink automatically moves indexed files into a database (consolidation) and moves items to the external Finder folder (deconsolidation), see the *Files > General > Indexed Items* settings.

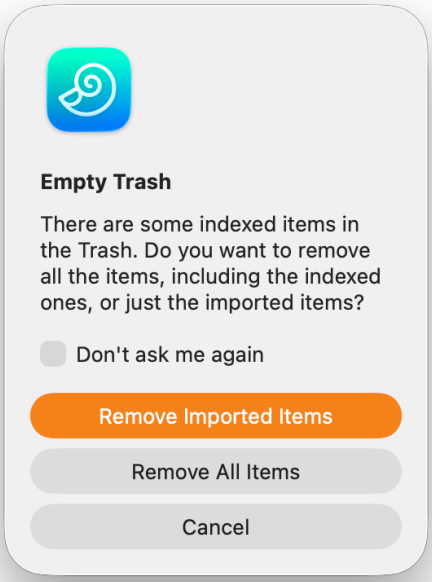
Moving Indexed Items: DEVONthink stores individually indexed items by its absolute path in the filesystem. If you move an individually indexed file or folder, it will disappear when the database updates or be reported as missing. This is because the item no longer exists in the indexed location, so the absolute path points to nothing. If you move a file or subfolder inside an indexed parent group, the change should be reflected in the database or the Finder. The parent folder still exists in the same location and DEVONthink can adjust for the changed relative paths within it.

While it's generally best to index fairly static locations, i.e., ones that you won't be relocating or renaming, sometimes it becomes necessary to do some housekeeping. Perhaps you are running low on space on the internal drive and need to move an indexed folder to a connected external drive. Open the *Tools > Inspectors > Generic Info* inspector, you can click the down arrow next to the *Path* title, choose *Select*, and select the parent folder in its new location. DEVONthink should update the stored paths to point to the Finder folder and its contents in the new location.



Deleting Indexed Items: When deleting indexed items, you will see one of two warnings when you empty the database's trash, depending on how you've indexed the item. With individually indexed files or

an indexed parent folder, you will see the warning above prompting you to choose whether to delete the item from the file system or just the reference in the database. In this instance, DEVONthink is prompting you to make sure you aware of the potential removal of a top level indexed item.



If you delete a subgroup or file in an indexed group and empty the database's trash, you will be shown a warning there are indexed items detected in the trash. You can choose to *Remove Imported Items* which will not delete indexed files. Choose *Remove All Items* to remove both indexed and imported files when emptying the trash. Indexed files will be moved to the system trash from their location in the Finder. In this situation, DEVONthink is modifying the content of the indexed parent to ensure both the Finder and database's contents match.

Duplicating Indexed Items: When you duplicate an indexed item, the behavior depends on if you're duplicating within a database or between databases. if you duplicate the item in the same database, a copy will be created in the Finder in anticipation of potential changes. If you duplicate the item into another database, no copy will be created in the Finder. However, changes made to the item - in either database - will affect both databases as the indexed item is pointing at the same item in the Finder.

> Note: While you cannot replicate files between databases, the duplication of an indexed file across databases can provide you with a similar behavior. However, the files will not be marked as duplicates since duplicates are not detected across databases.

Replicating Indexed Files: Replicating indexed files within a database, individually or within parent folders, has no effect on the files in the Finder. Replicating only adds a record of another instance of the file. However, if you delete a replicant of an indexed file and empty the database's trash, this will have no effect on the files in the Finder. They will remain intact.

Indexing Cloud-synced Folders: One of the common uses of indexing is to keep a local folder in a cloud-synced location, e.g., Dropbox, and have access to the files within DEVONthink. While this is certainly supported, be aware that changes made to the local folder, especially when the cloud service syncs, they may not always be detected by DEVONthink. In that instance,

you can manually update the indexed group by selecting and hoisting it via the disclosure triangle or choosing the *File > Update Indexed Items* command. Also, you should only index local data, e.g., on the local hard drive or connected drives. DEVONthink doesn't support indexing data that resides only in the cloud.

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

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

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

DRAG & DROP

The Mac has always been an environment with rich drag-and-drop support. DEVONthink is a well-behaved citizen in this regard. In fact, on a Mac your first instinct should be trying a drag and drop. Here are a few useful scenarios to consider:

IN

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

- Drag files from the Finder into a database. Holding certain command keys will allow you to copy, move, or index them. See also p. 81ff
- Drag files from the Finder to DEVONthink's dock icon. Files will be sent to DEVONthink's default destination.
- With applications supporting drag-and-drop, you can drag data between them and DEVONthink. For example, you can drag messages from Apple Mail into your database or DEVONthink's dock icon.
- Inside DEVONthink, you may be able to drag content from a file into the database. If you have an email message with an attachment imported into your database, you can drag the attachment out as a separate file.
- With some file types it's possible to select text and drag it out to create a new file. DEVONthink will attempt to create the most appropriate file type.

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

OUT

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

- For email applications lacking good automation support, drag a document onto its dock icon or into a draft email to attach it.
- Drag documents or groups to the Finder as a quick export option. When you do this,

DEVONthink may export Finder tags on those documents, *if enabled*.

- If you need to upload a document to a website, drag the document directly from your database just as you would in the Finder. If you need to upload a group of files, you'd need to drag the group to the Finder first, likely compress it, then upload to the site.

INSIDE

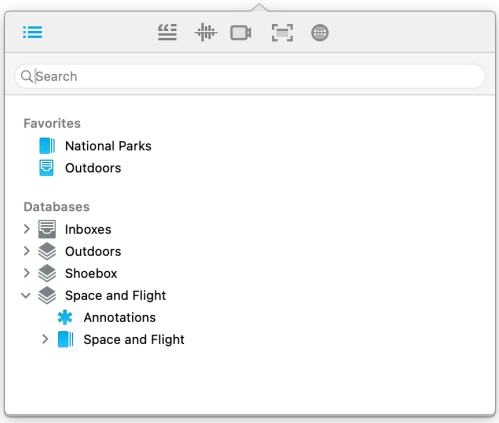
And obviously DEVONthink allows dragging database items inside itself for reorganization.

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

SORTER

The *Sorter* is a multi-purpose utility built into DEVONthink providing options for adding files and creating various types of notes. When enabled in Settings > Sorter, it is found in the menubar at the top of your screen — displayed as *DEVONthink* or the nautilus icon — or docked to the side of your window. Details about the views and controls of the *Sorter* are covered in the Sorter section of the Windows chapter.

> Note: Due to very tight integration, DEVONthink must be running in order to use the *Sorter's* functions.



Navigation: The first view of the *Sorter* is the *Navigation* view. If you are in another application and want to quickly add a document to your database, this is the view you will use. When it opens you will see databases and groups you can drag and drop to. If you have a group you frequently use, add it to the *Favorites* section of the *Navigate* sidebar and it will also appear in the *Sorter*. If you have a particular group in mind, you can use the search field to quickly locate it. Start typing part of the name and matches will appear as you type but bear in mind this doesn't support wildcards, like `*tech*`. While DEVONthink is running, it will retain the search. Beyond adding files, you can double-click a group or database to open it in its own window. Alternately, you can choose to *Open* or *Reveal* the group in a new window via the context menu.

COMMON NOTE CONTROLS

In the note-taking views, you'll find a set of controls in every pane: *Name*, *Info* containing property metadata like ratings, label, etc., and *Tags*. There are also familiar buttons you'll see: *Add* and the *Reset* button to clear the

pane and start afresh. You can press ⌘S to add a document or the ⎋ Escape key to reset the pane.

One item to note is the *Location* dropdown, i.e., choosing where to save the document. If you want to create a new group, it's the first option in the dropdown. If you want to change the database, choose it first, then open the dropdown again and choose *New Group*. And the last used location is remembered, so you can quickly create notes in the same location.

NOTE CREATION

Take Note: If you ever just needed to jot down a thought, you likely have gone in search of some utility to help with that. And while there are some apps built just for that purpose, they don't directly integrate with DEVONthink.

You can quickly open the Sorter and switch to this view or use a hotkey you specified as mentioned above. A quick tap of the hotkey and you can compose a note in plain or rich text, formatted note, or Markdown. It supports formatting for the specific types, e.g., bold, italic, Markdown headings, etc. If you're not finished with your note, the content is saved for later, even across application relaunches. Set tags, ratings, labels, etc., as needed. When you're finished, save it directly into your database.

The *Take Note* view also responds to the *Copy Selection* hotkey, allowing you to clip selected text.

Voice Note: If typing isn't an option, the *Sorter* can also record audio. Open the view, press the record button, and make your note. After you stop recording, you can play it back then add it or reset the pane and record again. When done, add your metadata, if needed, and add it to your database.

Video Note: Using your Mac's built-in camera or webcam, you record video notes in the *Sorter*. Open to the *Video Notes* view and the camera turns on, showing you a live preview. Click the record button and create a video to be saved directly into your database.

When you're done recording, you can play back the video before saving it. Scrub through the video with the slider to move quickly to certain parts. You can trim the video by pressing the scissor icon then dragging the end points then press the *Trim* key. You can re-trim the file until you save it. When you're satisfied with the result, enter any metadata, if it's needed, and add it in your chosen location.

Screen Capture: Similar to note taking, many people have a screen capture app, even if it's just the built-in commands from Apple. As a convenience, DEVONthink has this function built-in for quick and simple captures directly into your database. Open the view and click your option: *Screen*, *Window*, or *Selection*. While using the windowed or selection modes, you can still switch applications via macOS' ^⇥ or Mission Control spaces, if the need arises. After the clip, you can change the name and metadata and add the image, or reset the pane and do another screen capture.

On a side note, there is a small suite of markup tools for images so you can add some emphasis to the screen captures after the fact.

Web Clip: The *Web Clip* is for clipping content from browser, acting as the interface to our *Clip To DEVONthink* browser extension. In these scenarios, the *Web Clip* view opens, pre-populated with the page title and URL.

- You are using your favorite compatible-browser and want to capture the current page. Click the our extension button or use the *Clip to DEVONthink* hotkey you defined.
- You are reading in a document, an email, or even a message, that has a link in it. Control-click the link and choose *Copy Link*. Open the *Web Clip* view and choose *URL on the clipboard*.
- Perhaps less commonly used, but if you know the URL you want to clip, you can choose *Enter manually* and type it in yourself.

And just as you've read about the other views, reset the pane or add the document to your database.

GOING PAPERLESS IN DEVONTHINK

Scanning is an integral part of many workflows, at home, on the road, or in the office. DEVONthink has built-in scanning controls to interface directly with your databases. Combined with the internal OCR, it makes for a much more efficient workflow.

If you are using a Ricoh (Fujitsu) ScanSnap scanner, see the next section.

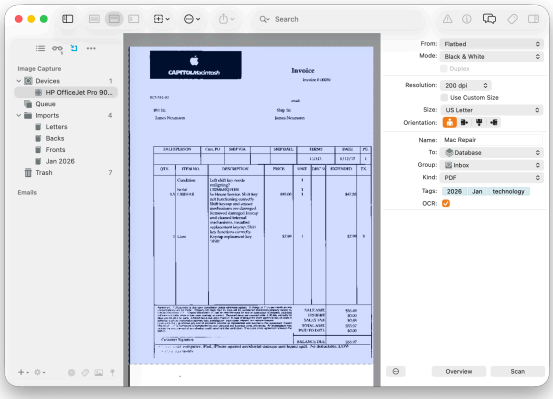
TECHNICAL CONSIDERATIONS

If you have a scanner or are shopping for one, you should check the details of the specific product. It should firstly be compatible with the version of macOS you're running. This is especially true if you're buying a used or older scanner. Secondly, and more importantly, make sure it supports Apple's Image Capture Architecture. Search for the scanner's downloadable drivers and look for `ICA` drivers not TWAIN. The ICA driver should work with Apple's Image Capture application and also DEVONthink.

> Note: Hold a sheet of paper in your hand. Technically, it is one leaf with two sides: a front and a back. So if you have a single leaf with printing on both sides, you have two pages to scan, not one. This distinction is important to understand when scanning double-sided or multi-leaved documents.

All of DEVONthink's internal scanning functions are done in the *View > Import* sidebar. Here we will look at simple step-by-step instructions for the types of scans you may need to do. So start by opening the *Image Capture* section.

SINGLE PAGE SCANS



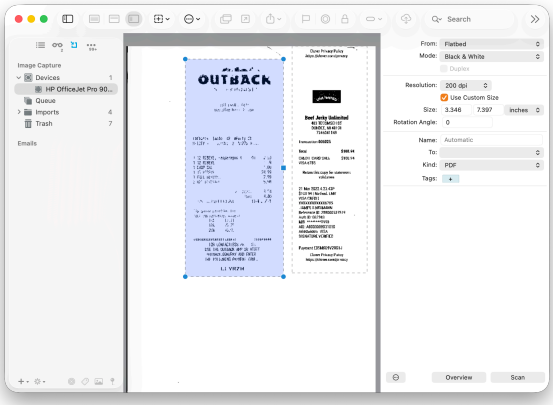
Single page single-sided documents are very common, e.g., receipts or invoices. Fortunately, they're also very quickly and easily scanned.

1. Select the scanner: Choose your scanner listed in *Devices*. DEVONthink will connect with the scanner. If *Flatbed* is chosen, an overview of the scanning area will be shown. If no document is on the flatbed, add one and press the *Overview* button to refresh the preview.

2. Set the scanning options: There are a small number of options to choose, many of which will remain as defaults, e.g., the resolution. These are described in the Windows > Sidebar: Image Capture section. However, for a quick reference, here are a few you may change per-document:

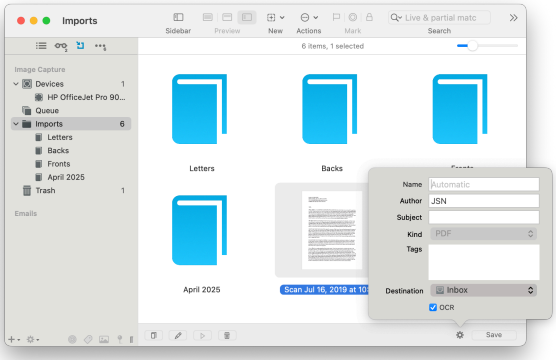
- **Name:** Enter a specific name for the resulting document. Otherwise a timestamp will be used.
- **To:** Choose a location in a database under the *DEVONthink* option where the final document should be saved, e.g., in the Global Inbox.
- **Tags:** Add any per-document tags, if needed, e.g., *receipt*.
- **OCR:** Choose whether to use OCR to create a searchable document.

3. Load and scan: Put your document on the flatbed or in the document feeder. The press the *Start* button in DEVONthink's scan window. You should now have your finished document in your chosen location. If you aren't entering a specific name and are scanning to the same location, put in a new document and continue scanning.



Ganged Scans: A variation on single-page scans is ganged scanning: scanning multiple smaller documents on a flatbed scanner. Imagine you have five receipts from a business night out. Lay them out on the scanner fairly squarely and not overlapping. Enable the *Use Custom Size* option. Click and drag the handles of the purple overlay to encompass one receipt. Click away from the overlay when it's sized correctly. Now click and drag over the next receipt to add an overlay for it. Continue adding overlays for each individual item on the scanner. When ready, press the *Scan* button and each will be scanned to individual documents, saved to the destination you chose.

DEFERRED SCANNING



In some scenarios, you may need to scan multiple documents without immediately producing a final PDF. This may be rapid-fire scanning receipts to be collated later. Or you may have a partial set of documents scanned but await the arrival of more to add to a final document. To do this, follow the same steps as multi-page scanning.

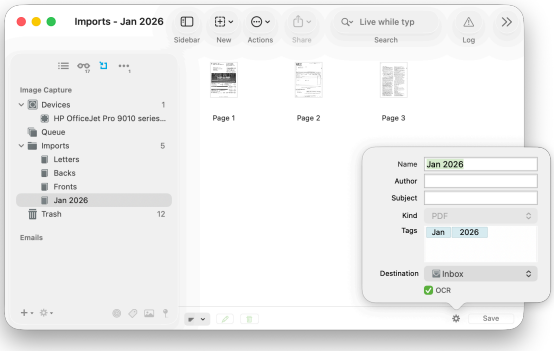
Binders: A binder in DEVONthink is similar to its real-world counterpart: a temporary holding place for documents. You can choose a binder or create a new one in your scan settings. In the *Imports* section, select a binder to see the current scans it holds. Within a binder, there are some specific tools for working with the documents:

- Double-click a page to edit it. For PDF pages, you can rotate to correct the orientation. For image pages: double-click the loaded image to adjust the color, drag a marquee and press the *Crop* tool to remove unwanted border areas.
- Drag and drop to manually reorder the pages.
- Click the Organize button at the bottom to reverse/shuffle the pages or to merge two binders into one.
- Click the ⚙ button to set metadata like the *Author* and *Subject*, as well as set the *Destination* to save to.

When you have all your scans in the binder, organized as needed, press the *Save* button to process it into the finished document.

Imports: Scans in the *Imports* section are ungrouped and can be modified individually. Or select and gather them into an existing binder via drag and drop or into a new binder via the context menu. When you're ready, you can press the *Save* button to process a loose scan or a binder into a finished document.

MULTI-PAGE SCANS



Many documents are double-sided or have multiple pages that need to be collated into a single document. This requires scanning into a binder you'll save when you're finished scanning pages belonging in one finished document. These steps begin in the same way as single-page scans.

1. Select the scanner: Choose your scanner listed in *Devices*. DEVONthink will connect with the scanner. If using a flatbed scanner,

choose *Flatbed* and remember you'll have to manually turn over the page to scan the back. If using a document feeder, check *Duplex* if needed.

2. Set the scanning options: There are a small number of options to choose, many of which will remain as defaults, e.g., the resolution. These are described in the Windows > Sidebar: Image Capture section. However, for a quick reference, here are a few you may change per-document:

- **Name:** Enter a specific name for the resulting document. Otherwise a timestamp will be used.
- **Tags:** Add any per-document tags, if needed, e.g., *receipt*.
- **OCR:** Choose whether to use OCR to create a searchable document.

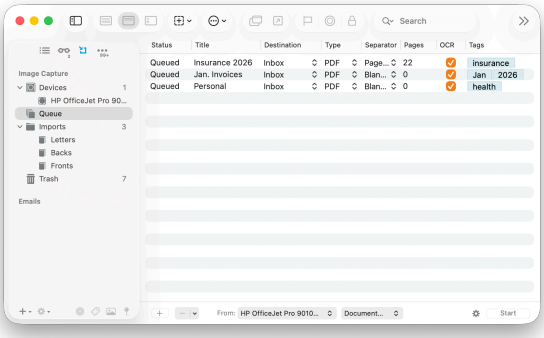
3. Select or create a binder: In the *To* dropdown, choose *Create New Binder* or choose an existing one.

4. Choose the destination: Set where the final multi-page PDF should be saved.

5. Load and scan: Put your document on the flatbed or in the document feeder. The press the *Start* button in DEVONthink's scan window. After the page is scanned, you will see a report section appear in the scanner window. This displays the name, the number of scanned pages, the estimated size of the finished document, and the chosen destination. Continue scanning the remaining pages. When done, press the *Save* button to process and save the final PDF.

After a binder is processed, the pages are sent to the scanner's *Trash*. It's recommended to periodically empty this trash with a quick Control-click then *Empty Trash*.

QUEUED SCANS



The scanning queue is where you can set up scan jobs to expedite scanning a group of separate documents. Each document, e.g., a twenty page insurance benefits package, is a separate job that will produce a single document. This is used more effectively with scanners having a document feeder.

1. Select the Queue: Instead of selecting the scanner in the Devices, select *Queue*.

2. Select the scanner: In the dropdown at the bottom of the window, choose your scanner.

3. Select the input type: Choose whether to use the *Flatbed* or *Document Feeder*, if available.

4. Set the scanning options: Click the ⚙ button and set the *Mode*, *Resolution*, *Size*, and *Duplex* if the pages are double-sided.

5. Add a scan job: Click the + button to add an entry for your first document. Fill out the parameters for the job.

- **Title:** If you want the document specifically named, enter the *Title*. Otherwise, a timestamp will be used as a default name.
- **Destination:** Choose the location in which to save the finished document, e.g., the Inbox of a specific database.
- **Type:** Choose the type. For multi-page documents, you must use *PDF*.
- **Separator:** Choose how DEVONthink's scanner can differentiate one document from the next. If you choose *Blank Page*, insert a blank sheet of paper at the end of each document in your stack, including one as the very last page. Otherwise, choose *Page Count* and fill out the next parameter.
- **Pages:** If you chose *Page Count*, enter the number of scanned pages in the document. See the note above regarding the difference between leaves and pages.
- **OCR:** Choose whether to use OCR to produce a searchable document. This is enabled by default.
- **Tags:** Optionally, enter any per-document tags, e.g., *health insurance*,*2025*, etc.

6. Load and scan: Now prepare your documents, remembering to insert blank pages between each if you chose the *Blank Page* separator. Put them in your scanner then press the *Start* button in DEVONthink's scanning window. Each job will be scanned one after the other until all are finished. Note the queue may pause if there are jobs to process but nothing in the document feeder. Add more documents to it and press *Start* again.

Finished jobs will show in the queue. Press the dropdown next to the minus button and remove sent (processed) jobs or all of them.

GOING PAPERLESS (OTHER OPTIONS)

If you don't have an ICA-compatible scanner, you likely can still get your scans into DEVONthink. And if you already have a collection of images you want to put in your databases, there are options to process those images as well.

SCANSNAP SCANNERS

A veteran in the scanning industry and considered solid and reliable, ScanSnap scanners are a good choice. They can't be directly controlled by us but with a proper scanning profile in the ScanSnap software, DEVONthink can receive and process those scans. Here's how to properly set up a profile in the ScanSnap Home (SSH) software:

1. Install the software: Download the SSH application from the link above and install it.

2. Set up a scanning profile: In the SSH application, create a scan profile following these proven steps:

- Select *ScanSnap Home* > *Scan Settings*.
- Select *Profile* > *Add new profile* and select the *ScanSnap Home* profile.
- Change the profile name to *Scan to DEVONthink*. In the *Managing* options, set the *Type* to *Mac (Scan to file)*. Leave the *Save to* field as-is.
- You need to establish a connection between SSH and DEVONthink. Click the dropdown menu for *Application* > *Send to* and choose *Add or Remove*. Press *Add*, locate DEVONthink, and add it as a destination. Enter a name, e.g.,

DEVONthink. Leave the other options as-is and press *OK*. Then select *DEVONthink*

- Now that these parameters are all set up, press the *Add* button to save the profile.

3. Load and Scan: Choose your new profile to scan to. Put a document into the scanner and scan it normally. The files will be sent to DEVONthink, either to the Global Inbox or a location you choose, depending on what you've set in *Settings > Files > Import > Destination*. Just make sure this is the chosen profile to send scans to your database.

ScanSnap Home also has OCR built-in. If you prefer to use it, click the *File format > Option* button in your scanning profile and enable *Convert to Searchable PDF*. Then set DEVONthink's *OCR > Convert Incoming Scans* settings to *No action*. Otherwise, use DEVONthink's OCR. You should not enable OCR in both applications.

USING AN UNSUPPORTED SCANNER

If you have a scanner with only a TWAIN driver, you may still be able to use it with DEVONthink. Open the settings of the scanner's application's and look for a *Open With* or *Send To* option that allows you to open or send the finished scan to another application. Set DEVONthink as the receiving application. If you're not running the Pro or Server editions of DEVONthink and the scanning application has OCR capabilities, enable it and set DEVONthink's *OCR > Convert Incoming Scans* settings to *No action*.

Load a document into the device and scan it as you normally would. The document should be sent to DEVONthink.

If the scanning application isn't OCR-capable, DEVONthink knows the identifiers of many scan applications and will convert the incoming scan to a searchable PDF if possible. If DEVONthink does not recognize your scan application, please create a Zip archive of the application and send it to us so that we can add its identifier to a future release of DEVONthink.

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

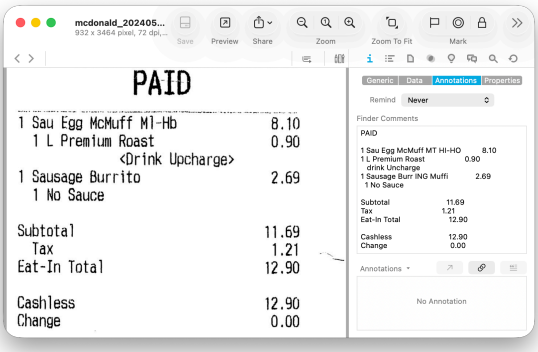
IMPORTING WITH OCR

If you already have an archive of scanned documents without OCR, you can import them while applying OCR.

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

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

AI ASSISTED TRANSCRIPTION



AI provides a power function for processing incoming images: Image Recognition. Using Apple's built-in Vision framework or a vision-capable AI engine, images can be examined and converted into text. That text can be stored in the database's index, as an annotation file, or a *Finder Comment* on the document. While not a replacement for OCR, the recognized text is immediately for various purposes.

Transcribing images can be done manually via the *Recognize > Transcribe Text & Notes* command in the *Data* and context menus. If you'd like to have this happen on every image you import, enable *Transcribe Text & Notes in images* in the *Files > Import* settings.

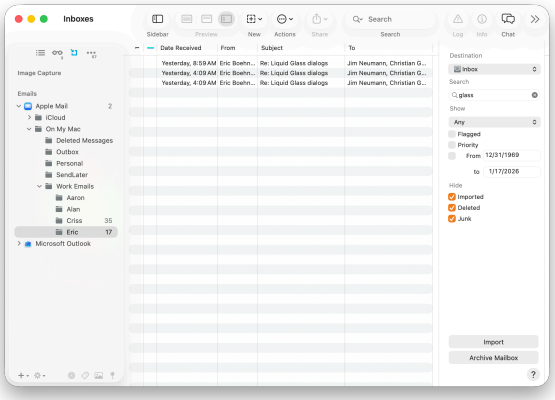
If you'd like to exert more control over transcribing images, don't enable the setting and instead implement a smart rule targeting a specific database or group and using the `On Import` event trigger.

HANDLING EMAIL

Email is an important item in many situations, both professional and personal. Imported email messages are saved in their original, uneditable file format (`.eml`) and are displayed using QuickLook or as an *text alternative* view. Some metadata, e.g., the "read" and "flagged" status of email messages will be preserved, when possible. Take some time to review the *Files > Emails* settings as well as a breakdown of the interface in the *Sidebar: Email* section of this document.

To address the need to store and search for emails, and to work around limitations of some email clients, DEVONthink supports several methods of importing emails. Let's look at the options…

IMPORT TO DEVONTHINK



Importing emails from Apple Mail or Microsoft Outlook can be done directly in DEVONthink.

1. Open the Import sidebar: Open the *View > Import* sidebar.

2. Select the email application: Open the appropriate email client, *Apple Mail* or *Microsoft Outlook* in the *Emails* section on the left.

3. Choose a mailbox: Select the desired mailbox. DEVONthink will communicate with the email application and begin building a list of available emails in the mailbox. Building this list takes more time with larger numbers of unimported emails.

4. Choose where to import: Choose or verify the target database in the *Destination* dropdown.

5. Archive the mailbox or import emails: Press the *Archive* button to archive the entire mailbox or select some emails and press the *Import* button. Repeat with other emails or mailboxes, as needed.

When you need to import emails while in DEVONthink, return to this sidebar and import or archive again. Also, don't forget the suite of controls on the right hand side are available to filter down to specific emails, e.g., from a particular person.

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

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

Import Via Hotkey: If you find yourself more actively working in Apple Mail or Outlook, you can archive a mailbox or selected emails with a hotkey. Set your desired key combinations in DEVONthink's *Files > Emails* settings. For longtime users of DEVONthink, you can set the familiar hotkeys previously used with our mail plugin: ⌥⌘M for messages; ⌥⇧⌘M for mailboxes. Go to the email client, select a few emails, then press your hotkeys. They will be imported based on your preferred import destination set in*Files > Import > Destination*.

> Note: Due to changes made by Microsoft, the Legacy interface is required for these commands to work. If you switch from the New Outlook to Legacy, please make sure to click the button to let them know it's important for them to continue supporting inter-application communication on Macs.

OTHER OPTIONS

Here are some alternate ways for you to get emails into DEVONthink. But bear in mind, the possibilities depend on the what your email application supports, e.g., scripting.

Drag and drop: Drag to the Finder then into DEVONthink, into the *Sorter*, into the *Global Inbox*, or directly into a database.

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

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

Mail Scripts: In scriptable email applications, e.g., Apple Mail, you can run application scripts from the global Scripts menu. There are a few provided for Apple Mail and Outlook but you are free to add your own if you have another email application that supports scripting.

Mail Rule Scripts: Apple Mail rules support running AppleScripts in their mail rules. We have provided a few for you to use or modify.

COPIES AND CONVERSATIONS

Importing copies of emails: Briefly discussed in the Appendix, a UUID is a value given to each item in DEVONthink. It is unique to each item and more than one item can't have the same UUID. When email messages are imported, they are given such an identifier based on metadata from the actual email. This means you can't import the same message into a database more than once, as that would result in more than one file having the same UUID. When you try, the *Log window* will show an error about "n emails already imported".

All that being said, it's not unusual to store an email in the more than one mailbox. But an import of your mailboxes may appear to be missing some emails as the copies won't import separately. To allow for this, enable *Previously imported will become replicants* in the *Files > Emails* settings and the copies will be imported into the same database as replicants.

Conversation threading: Depending on the settings in Files > Emails > Conversations, DEVONthink can attempt to import complete conversations and optionally group them. But be aware, email threading is not an exact process. A lack of standards and decades of legacy emails can inhibit the ability to fully detect a conversation. DEVONthink will attempt to thread the conversations, but cannot guarantee all related emails will be detected.

REPLYING AND SENDING

To reply to an archived email message in DEVONthink, select it and choose *Data > Send Reply* or Control-click it and choose the command from the context menu. A draft message will be composed in your default email application.

If you need to email a document to someone, select it, then choose *Send by Email* or Control-click it and choose the command from the context menu. This should create a draft email in your default email application with the document attached. Alternatively, many macOS applications support dropping files on their dock icon. For an email app, this usually creates a draft with the dropped file attached.

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

You can read a bit more about emails in DEVONthink in the Documents > Office Documents, Email, and Others > Email section. And if you're having issues archiving emails, please see the Troubleshooting > Email Import Issues section for assistance.

EXTENSIONS AND BOOKMARKLETS

DEVONthink provides a macOS sharing extension, a web browser extension, as well as bookmarklets, for conveniently clipping information from other applications into your DEVONthink database.

BROWSER EXTENSIONS

Browser extensions add functionality to your favorite web browser. DEVONthink's *Clip to DEVONthink* extension usually appears as a nautilus icon in the web browser's toolbar. When clicked, the *Clip to DEVONthink* will identify data about the current page in the browser and open the Web Clip section of the *Sorter* so you can quickly store references to web pages in your databases

Installing: *Clip to DEVONthink* is a native Safari extension but due to security changes made by Apple, you may need to enable it in Safari's *Settings* > *Extensions*. The extensions for Firefox and Chrome can be installed from our Extras download page. You can also access these pages via the DEVONthink > Install Add-Ons panel. Note there is no direct support for other browsers though some allow you to install Chrome extensions. This may allow you to install our extension in those browsers as well.

Another thing to consider is the security settings of browsers. When you clip content, you may see messages about allowing our extension to work on site A, then on site B, then site C, etc. You may also see multiple prompts asking to allow using our URL scheme. Those are messages from the browser, not our extension. These things can

change over time, usually becoming more and more restrictive. Check with their developers about supporting URL schemes.

BOOKMARKLETS

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

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

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

PDF SERVICES

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

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

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

- Select *File > Print*.
- In the appearing print dialog window, click the *PDF* button at the lower left corner and select *Save PDF to DEVONthink* from the menu. A PDF will be printed and sent to DEVONthink. Depending on your choice for the *Files > Import > Destination* setting, files import into the *Global Inbox* or lets you choose the destination group.

OTHER SOURCES

Beyond manually adding or creating documents, there are a variety of other contributors available in DEVONthink.

THE SHARE MENU

The macOS Share menu lets applications "share" data with other applications, Airdrop, etc. When you access the *Share* menu in a compatible application, you should see

an option, *Add to DEVONthink* that allows you to send data from the application to DEVONthink.

Installing: Depending on what version of macOS you're running, you may need to manually enable our sharing extension. Open *System Settings > Extensions > Sharing* and enable DEVONthink. It should now be available in any sharing-enabled application's *Share* menu.

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

THIRD-PARTY APPLICATIONS

Another source of new documents comes from special considerations for some third-party applications.

- **Apple Notes:** You can import your Apple Notes via the *Files > Import > Folders & Attachments from Notes* command. Imported as editable formatted notes, DEVONthink will also attempt to preserve folder structures in Notes. Be aware this is not a sync with Notes and subsequent imports will generate duplicates.
- **Evernote:** From Evernote, you can import exported `.enex` files. This can be done via the *File > Import > Files and Folders* command or by dropping the file on DEVONthink's dock icon. The notes are imported as editable formatted notes. This also is not a sync with Evernote and subsequent imports will generate duplicates.
- **Bookends:** A very popular bibliographic application is Bookends. Using the *File > Import > References from Bookends* command, you can import Bookends references as rich text documents with a back link to the original item. If you run this command again, existing rich text documents will be updated instead of reimported as duplicates.
- **Tinderbox:** Copy notes in Tinderbox and choose *Data > New > With Clipboard* to create plain or rich text copies of the notes in DEVONthink including backlinks and tags.

AI

Chat: When using *AI*, you can also generate documents. For example, chatting with certain AI engines like Claude, often automatically return responses as Markdown documents. These documents can easily be identified by the `(AI)` suffix at the end of their names. In fact, you can create a smart group with the criterion `Name ends with (AI)` to show all AI-generated documents.

Transcription: If you are using a *speech-to-text AI engine* to transcribe audio or video files, you can generate annotation files from the output. This often includes some timestamps from specific points in the playback.

Images: If you have access to a *generative image AI engine*, creating an image can be done via the *Data > New > Generate Image* panel. It's also possible to request an image during an *AI chat* and to copy or capture the image via the context menu.

TEMPLATES

Another way to create new documents is via Templates. Accessed in the *Data > New from Template* submenus, these are special files and smart templates that generate new documents on demand. These can be simple documents, like a phone note or more complicated documents, like a journaling document. Some of them are even AI-powered.

We also periodically publish additional templates via the *Support Assistant*.

AUTOMATION

DEVONthink is well known for it powerful automation features including the ability to create documents via scripting. We also make additional scripts available via the *Support Assistant*.

Application Scripts: Application scripts are those that run via the global Script menu while in another application. For example, while in Safari, you could run a script to generate bookmarks of all the tabs in the frontmost window. Our offerings are discussed in the Application Scripts section. Our Mail rule scripts are another example of application scripts.

Your scripts: If you are inclined to automation, or even just learning, you can write scripts to create documents. See the AppleScript section for more information on getting started with scripting.

URL Commands: As discussed in the URL Commands section, DEVONthink has a URL scheme that can be used to create certain kinds of documents. While they're less powerful and less commonly used, they are yet another tool available to making new documents via automation.

Bookmarklets: And just to make note of it, the bookmarklets discussed earlier in this chapter are also a type of automation that generates new documents for you.

DEVONTHINK SERVICES

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

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

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

DEVONagent Pro, and other Mac-native web browsers.

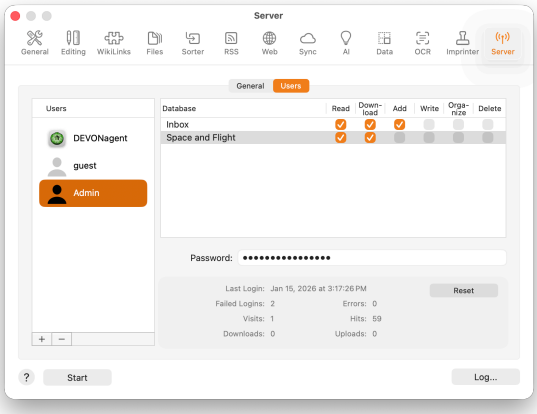
- **Append Plain/Rich Note/Markdown Note:** Adds selected text as plain text, rich text, or Markdown to the last note taken using the DEVONthink *Services* menu items.
- **Lookup:** Opens the search pane in DEVONthink with the selected text copied as search term.
- **Summarize:** Creates a new note in DEVONthink's inbox with a summary of the selected text using AI.

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

WEB SHARING

DEVONthink allows you to give others on the local network access to your databases using a standard web browser on any operating system (including Windows and Linux). Perhaps you're running DEVONthink in a corporate situation and want to give workers controlled access to some databases you have. In an educational setting, classroom resources could be available to students. Academic or creative collaborators contribute to a common database, even if they're not all Mac users.

The embedded web server in the Server edition provides an interactive web interface that allows your users to interact with the shared databases. Here are the steps to getting started using this powerful feature.



SETTING IT UP

DEVONthink's web server runs on macOS inside our application. It is not a separate process. This means you need to install and run it on a Mac that is on and awake when people need access to it. Many times this is a dedicated Mac mini. Regarding databases, it only makes available databases you have open, though you can control who has access to them. Fortunately, getting things up and running is typically a fairly simple thing.

1. Open your databases: Whatever databases you need to make available, open them. Don't imagine you need to open and close certain ones for certain people. That is managed in the settings.

2. Set up the server: The *Server > General* settings are not complicated, though administered networks, e.g., corporate/academic networks, may require IT's

involvement. However, this is typically a one-time setup, unless changes are required in the future.

Two things to consider are setting a specific *Bonjour Name* and *Bonjour Port*. The name just makes things more easily identifiable to the end user, though it's not critical if you're sharing an IP-based URL. We do recommend specifying a port number. This makes for a consistent point of access for your users. If you don't specify one, a random unused port will be used every time the server launches.

Certificates: Another thing to think about is the TLS certificate, assuring the server is legitimate to your end users . Where you obtain one is up to you but you need to obtain a file you can import via the *Load P12/PFX file* button.

Self-signed: While we don't advocate one way or the other, there is the possibility of creating a certificate directly in DEVONthink. Click the *Create self-signed certificate* button then select `DEVONthink Server` in the certificate dropdown.

Self-signed certificates will often show warnings in a browser that a certificate is unknown or invalid. But you can manually set the trust level to avoid the warning:

- **1:** Open `/Applications/Utilities/Keychain Access`.
- **2:** Click *login* in the sidebar, then *My Certificates*.
- **3:** Search for `devonthink` to locate our certificate.
- **4:** Double-click it, open the *Trust* section, and set *When using this certificate* to `Always Trust`. Close it, okaying the change when prompted.
- **5:** With the certificate selected, choose *File > Export Items* and save a `.p12` file you could share with an end-user. Note the `.p12` file is typically used on Macs (non-Windows machines) and the format exported from Keychain Access.

3. Add users: First decide who needs access and how granular that access is. For example, it could be sufficient to have a department account, e.g., *Shipping* with a single login and password. Or you could set up individual logins, say for the head of Human Resources.

Secondly, you decide what permissions on what databases these users have. For example, a student may have read-only access to a classroom database while the teacher has all permissions. Additionally, if no permissions are granted to an individual for a certain database, it won't be visible in the web interface. Also, be aware no one will have permissions to *write* to, i.e., modify file contents, in an revision-proof database.

4. Start the server: Once all the users and their permissions are established, press the *Start* button. You can also select the *Tools > Start Server* command or choose the *Start Server* command in DEVONthink's dock icon. If the server is running, these will display *Stop* instead.

At the bottom of the *Settings* window you will see two URLs: one is IP-based, the other uses the Bonjour name. We don't dictate which to use and both give the same access.

5. Invite the users: You will need to share the URL to any user who needs access. How you disseminate that is up to you and the channels of communication you feel are appropriate. You can click and open the URL in a browser, Control-click it in the *Settings* window and either copy or share it, or you can drag and drop it into other applications. Also, you may need to provide a certificate to them as well.

We recommend the end-user adds the URL as bookmark in their browser so they can quickly access it in the future, as needed. This is also why setting a specific port is a good idea.

Now the users should be able to login with their provided credentials and use the databases they have been granted access to. And during normal operation, the only steps you as the administrator may need to do occasionally is stopping and starting the server to add, remove, or modify users.

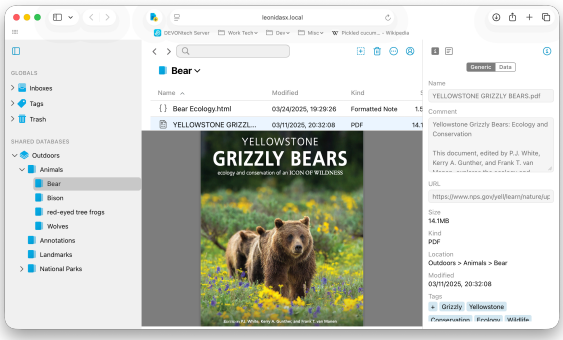
> Note: We believe in data privacy and hope you do too. Browsers may present options to save login credentials. Some may even save the credentials by default. We are cautious of the first and not a fan of the second. If the user is on a shared computer, consider what access other users could have if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

COMMON QUESTIONS

How many licenses am I going to need?: This may be surprising but the answer is: one. The only license you need is for the Mac running the Server edition. You don't need to purchase per-user licenses.

How many people can connect?: The built-in web server is not designed to become a user-facing portal on the Internet for thousands of daily users. It is ideally used on a local network with the possibility of remote connections (see below). There is no stated maximum number of concurrent users.

Is there feature parity with the desktop app?: The answer is no as it's technologically infeasible. The web interface is limited by web technologies in a browser and a browser is also no match for the heavy-lifting our desktop app does daily. That being said, it is very functional for many groups of people across the world.



USING THE WEB INTERFACE

The interactive web interface imitates the look-and-feel of DEVONthink in many ways, but in a condensed form. Contrary to a static web site, it only loads once; clicking buttons or links does not reload the whole page but dynamically updates it. While a simpler interface than our desktop application, it provides useful access in many situations. You can also find descriptions of the controls in the Web Sharing section of the Windows chapter.

Similar to the DEVONthink, the web interface is divided into panes: sidebar, item list, and view/edit pane, etc. However, some operations, e.g., deleting or organizing items, are logically dependent on the per-user permissions.

Sidebar: The sidebar is where you can navigate the databases' inboxes, groups, tags, and trashes in the sidebar. You can drag items from the item list to reorganize things. Control-clicking an item here gives you the option to make a new group or RSS feed, delete or rename a group, or empty the Trash.

Item List: Selecting items in the sidebar will display the contents in the item list. The list can be sorted by clicking the column headers. While they can't be reordered, you can enable or disable them in the context menu of the headers. If you move your cursor between the section headers, a separator will appear. Click and drag it to resize the columns.

Double-click groups to display their contents in the item list. For quick navigation, press the < arrow to go back to previously visited locations. Click to select items or hold the ⌘ Command key to select multiple items. This applies to contiguous and non-contiguous selections. Selected items can be dragged and dropped, e.g., into groups in the item list or in the sidebar. You can also access commands in the context menu when you Control-click in the item list. This is a quick way to add a new file.

View/Edit pane: Displayed below the item list, this pane will display the contents of compatible files. Due to the limitations of browser technologies, some file types can't be displayed. Clicking and dragging the divider bar allows you to resize the pane. A select number of file types, e.g., plain text, formatted notes, and Markdown files can be viewed and edited in this pane.

Search: Searching the viewable databases can be done in the search field. Enter search terms, including using search prefixes to focus the searches. For example, you can do a search for `text:housing tags:government`. You can filter where you're searching by selecting a different scope in the location dropdown, e.g., *All Databases* or a specific database to search in.

Toolbar: In addition to the search field, the toolbar has a few other options. The new document menu lets you create a new native document or upload one from the Finder. Quickly move a selected item to the database's Trash with its own button. The *Action* menu lets you do a few things: copy the item link or URL of a selected item, open the Generic info inspector with *Get Info*, download the document to your device, or move it to the Trash. The *User* menu allows you to switch between English and German language, from light to dark mode, and also provides a *Log Out* option. Lastly, click the *Info* button to open the inspectors.

Info Inspectors: The *Generic* inspector on the right displays basic metadata about the selected item, with certain attributes being editable, e.g, *Tags* or *Label*. The *Data* inspector lets you view and edit *custom metadata* applied to the selected document.

See Also: The next view is the See Also inspector, displaying potentially related files in the current database you are viewing. Clicking on a match displays it in the view/

edit pane. Note the original document is always the top match, so you can return to the original document by clicking it at the top of the inspector.

ACCESSING YOUR DATA OVER THE INTERNET

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

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

If everything goes well, you will be able to access your database using an address like: `http://xxx.xxx.xxx.xxx:port`, where `xxx.xxx.xxx.xxx` is your current public IP address. (Note: This is your router's address on the internet, not your Mac's.) Next, `port` is the outside port number leading to your published database.

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

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

the public port in step 4. If you are in doubt about how you configure your router to do port forwarding, you need to consult the manual that came with your router. It is usually done through a web-based interface or custom-built administration application.

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

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

EXPORTS

The first part of this chapter focused on getting your documents into your databases. Here are some of the export options for getting your documents (and groups) out.

DRAG & DROP

The simplest, and most macOS-native way, to export items is via drag and drop. This is something you do in the Finder all the time and there's no need to vary your behavior with the documents in your databases. Groups export as Finder folders and include their contents. When dragging out documents, there is no conversion of the dropped file just as there is no conversion when importing them. The only change to the file is the inclusion of Finder tags or custom metadata.

One of the common misunderstandings about using your documents with third-party applications is that they are "locked away" in your database. This causes people to try and get into the internals of the database to use them. You should not do this and there is absolutely no need to. With few exceptions, you can drag and drop a document from your database into another application. This includes dropping into a Save panel, e.g., when uploading to a website using a *Choose File* button.

Remember, the receiving application controls whether they accept dropped data and how it is handled. If you do run into an issue, you can try dragging and dropping to the Finder first, but this should be a rare exception.

EXPORT COMMANDS

In the *Files > Export* submenu, there are a variety of commands for exporting data. A range of options are available, including some commands to export an aggregate file from a selection of documents. For example, if you have multiple rich text files selected, you can export to a single document from this menu. This is in contrast to using the *Data > Convert* command, which produces one PDF per document.

Beyond drag and drop, you can use the *File > Export > Files and Folders* command on a selection of items in your database. When you use this command, it's a good idea to export to a newly created folder to keep the exported items separate from unrelated files. You may see a DEVONthink export produces a support file, a `DEVONtech_Storage` file, used for future reimporting. If you're not reimporting, these files can be removed.

If you are serious about backups (and we hope you are!), the *Export > Database Archive* command creates an optimized and compressed ZIP archive of a selected database, perfect for a secondary backup. The ZIP can be safely archived to an external disk or even a cloud service. Note this is a full backup, so it takes longer to backup and requires more disk space as your database grows.

AUTOMATION

For those that like to script, there is a specific `export record` command. Just provide a `record`, including a selection, and specify where to export with the `to` parameter. If used with a group, the group and its contents will be exported to the specified location. This command also produces the storage file mentioned above, but you can disable exporting this file with a `without DEVONtech_Storage` parameter.

Now finally, let's discuss syncing...

SYNC EXPLAINED

In this section, we will clarify what sync is (and isn't) and how to make an informed choice about the method you choose. In the subsequent pages we will discuss technical considerations and the basic setup of each type. But let us clarify: this section isn't long because sync is complicated. It's long due to the variety of options available.

SYNC SIMPLIFIED

Sync is an incredibly simple and logical concept. You have a database on Mac A. You want that database on Mac B. On Mac A, you upload the database to a sync location accessible to both machines. On Mac B, you access the same sync location and import the database. Now both Macs have a local copy of a database. When anything changes on either Mac, they are transmitted to each other via the sync location. The only variation is if Mac B already has a copy of the database, it will be able to merge with the sync data in the sync location. That's it: simple.

And every sync is conceptually the same, following the same essential pattern shown here:

- Enable a location (with or without an encryption key) on Mac A.
- Upload a database to the sync location.
- Enable the same location in DEVONthink on Mac B, making sure to use the same encryption key, if specified.
- Import the database or merge with the existing sync data.

So you're essentially only using steps 2 and 4 when you want to sync new or unsynced databases, something that likely won't happen often. In fact, the only practical difference is, a Bonjour sync transmits directly between the devices so you wouldn't use step 2.

INDEXING AND SYNC

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

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

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

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

That all being said, here are the sync methods available in DEVONthink:

Bonjour: Bonjour is a direct connection sync between two Macs that are on the same local network. It is fast, private, and generally reliable with no intermediary sync location.

- It requires devices to be on and our app running
- It only works on LANs permitting Bonjour or non-standard port traffic and does not work over VPN. Firewalls and networking apps must allow exceptions for DEVONthink's traffic.

Local Sync Store: A local sync store syncs to a specialized folder residing on a commonly accessible location, like a drive on your network. It can also be stored on a connected external drive or thumb drive. It is generally very fast and very private.

- It can be located on an external drive or a shared resource, like an NAS. And it doesn't require other Macs to be up and running.
- Only for Mac-to-Mac syncing. It also requires access to the volume or machine where the sync store is located.

Dropbox: A Dropbox sync transmits and stores sync data directly on Dropbox' servers.

- Generally reliable and doesn't unnecessarily use local disk space and bandwidth when set up properly.
- As a remote location, you could experience slow/unresponsive servers, limited maximum connections, and bandwidth throttling.Questions of privacy can be offset by using an encryption key.

iCloud: There are actually two iCloud syncs: a *iCloud (Legacy)* sync and a *CloudKit (iCloud)* sync. Both transmit and store sync data on Apple's servers.

- Easy to setup. *CloudKit (iCloud)* syncs directly to Apple's servers.
- Like any remote service, the same pitfalls apply. Some people experience stalls or temporary outages, but this is not true for everyone.

WebDAV: A WebDAV sync transmits and stores sync data on a WebDAV server, whether locally, e.g., on an NAS or via a commercial cloud provider.

- Offers potentially more sync opportunities. When hosted locally, provides a fast, generally reliable, and private sync. This is especially true on Ethernet.
- The reliability of a local setup may vary and may require more technical expertise to set up and administer. If accessing WebDAV remotely, the same remote pitfalls have to be considered.

> Note: If you intend to sync with DEVONthink To Go on an Apple-mobile device, a local sync store cannot be used.

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 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.

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

What is an encryption key? : Regarding the privacy of your synced data, 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. This key is used to "scramble" or "descramble" the sync data using AES-256 encryption and the data is stored in an encrypted state. All databases synced to a location using an encryption key will sync encrypted data. Bear in mind, if you specify a key when syncing, you must use the same encryption key when setting up the same sync location on other devices running DEVONthink or DEVONthink To Go.

If you get a message in the *Log* window or popover about an `invalid encryption key`, please check out the Sync troubleshooting section.

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

What are the Local and Remote sections for? : As noted above, a database must be local to the machine so it must either be open in DEVONthink or imported from the sync location. For a non-Bonjour sync location, *Local* section of the Databases list displays all local open databases. For a Bonjour location, the Local section displays databases that are open both on the local machine and the Bonjour server machine. In both cases, the *Remote* section displays any databases that aren't open locally or those that have never been imported to the local machine. Remember this: You cannot sync to a remote database. It must be imported locally, then you work with and sync the local copy.

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 or a local sync store for syncing 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. Doing so could cause conditions where one cloud-service's

sync data would be out of date, causing conflicts with syncing. Each sync location is updated independently so changes may not be received in one location before it syncs. Additionally, unnecessary duplicates might be caused, especially if the *Conflicts* setting in Sync preferences is set to *Duplicate documents*. Lastly, syncing a database to multiple remote locations may waste space and bandwidth in some cases.

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. In situations where you need to sync certain databases to certain individuals, you can use one sync store for each subset of databases.

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? : DEVONthink's sync does not run constantly. To balance performance and reduce unnecessary network noise, it syncs on an interval. While the interval can vary by sync method, a good standard to consider is: sync will initiate up to 45 seconds after a change is saved in a database and every 4.5 minutes of idle time when set to *Automatic*. You can set a different interval, noting a longer interval, e.g., *Hourly*, can help lessen the resource load.

Another consideration with a remote sync is the quality of the network and server responses. If your network is slow or poor quality or the remote servers are slow, not responding quickly, or bandwidth is being throttled, the speed of the sync will be affected. Syncs on your local network, e.g., Bonjour, are much less likely to be affected.

Sync is my backup: If you've spent any time on our forums, you will have heard this before. Sync is neither advertised nor advocated as a backup method. A proper backup:

- is application-agnostic, meaning the files in the backup are accessible in the filesystem or by other applications. Our sync data is only usable in DEVONthink and DEVONthink To Go.
- ideally stores files in their native state so you can easily restore individual items as needed. Our sync data is not storing your files. You can't go into a sync location and find a PDF of your 2020 taxes, nor can anyone. And when including encryption on your sync location, there is nothing recognizable to anyone.
- provides access to the past state of files. Our sync engine continuously updates the sync data, not preserving any previous states.

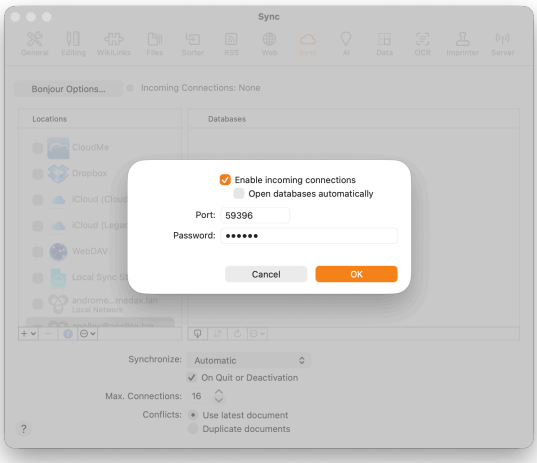
Sync fulfills none of those criteria. For a discussion on proper backups, see A Word About Backups in the opening chapter of the help.

I'll just put my databases in (name your cloud service): This is not data-safe and never has been. The mechanisms used by cloud services are not compatible with package files, like our databases. Due to the number of broken databases we've seen over the years, DEVONthink will neither sync nor open databases stored in these locations. We suggest keeping them in a folder in your home folder, like `~/Databases`.

I want to access my databases from one location: To clarify, you can't store your databases in the cloud. They must be stored locally, whether that's on the internal hard drive or a connected external drive. As NAS is possible but you should do this only if you're on gigabit Ethernet or better.

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

SYNC: BONJOUR



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

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 like Little Snitch, you must add exceptions for DEVONthink's traffic.
- The devices, one acting as the Bonjour server, the other as the Bonjour client, must be on and running DEVONthink or DEVONthink To Go, 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 Mac, you should not be enabling it on another device, neither Mac or mobile.
- Our applications must have local network access, mandated by Apple. On macOS Sequoia, you must enable DEVONthink in *System Settings > Privacy & Security > Local Network*. On iOS/iPadOS, enable DEVONthink in *Settings > Privacy & Security > Local Network*.

SETUP

In a typical Bonjour setup, the most active Mac is the Bonjour server. For the smoothest process, this is also where you will make new databases, when needed. Here is how to set up the server and a client Mac.

Setting up the server Mac:

- **Step 1:** Open DEVONthink's *Sync* settings and click the *Bonjour Options* button.
- **Step 2:** Check *Enable Incoming Connections*.
- **Step 3:** If you have a known port to assign, enter it in the *Port* field. Otherwise, leave it empty and an unused one will be assigned at launch.
- **Step 4:** Enter a mandatory *Password*, used to authenticate client devices.
- **Step 5:** Leave DEVONthink running and awake.

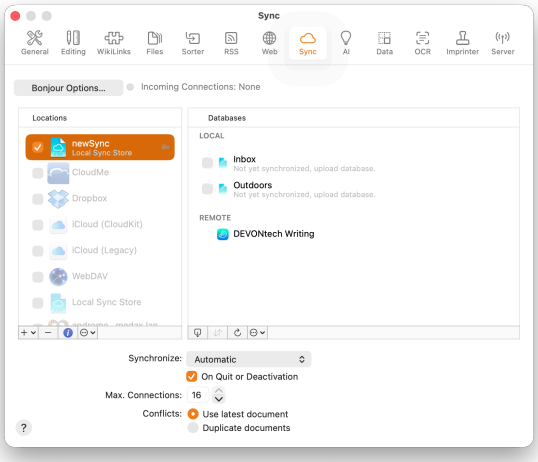
Setting up a client Mac:

- **Step 1:** Open DEVONthink's *Sync* settings. In the *Locations* list, you should see the server Mac available as a sync location.
- **Step 2:** Enable the checkbox next to the server Mac and enter the Bonjour password you specified. If entered incorrectly, you will be prompted to enter it again. If entered correctly, the sync location will become active.
- **Step 3:** Select the sync location. In the *Databases* list on the right, you will see databases that are open on both devices, e.g., ones you copied over manually. In the *Remote* section, you will see databases that either aren't open or haven't been imported.
- **Step 4:** If you have a matching *Local* database, check the checkbox to merge with the server Mac's copy. Repeat with others as needed.
- **Step 5:** If you need to import a remote database, Control-click it in the *Remote* section and choose the appropriate import

option, ideally saving to the `~/Databases` directory. Repeat this step as needed.

You are now syncing a local copy of the database between the two Macs, with changes made on either propagating to the other.

SYNC: LOCAL SYNC STORE



A local sync store is a specialized folder containing sync data on your local machine or connected drives and servers. This is a very fast, reliable sync, and very private method for Mac-to-Mac syncing. You can use one sync store to sync multiple databases or create more than one, e.g., one for a particular group of databases.

TECHNICAL CONSIDERATIONS

There are very few technical limitations to local sync stores. To be used with multiple Macs, they are ideally located on a file server or networked volume. It's even possible to create a sync store on an external drive that gets ejected and connected to other Macs, back and forth. For example, if you have a computer at home and the office or a vacation home, this would be an incredibly private way to shuttle databases changes between locations.

> Note: Local sync stores cannot be used with DEVONthink To Go.

SETUP

Setting up and using a local sync store is a simple thing to accomplish. It is created on one Mac then accessed and added on others. On the first Mac...

Setup a new Local Sync Store:

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

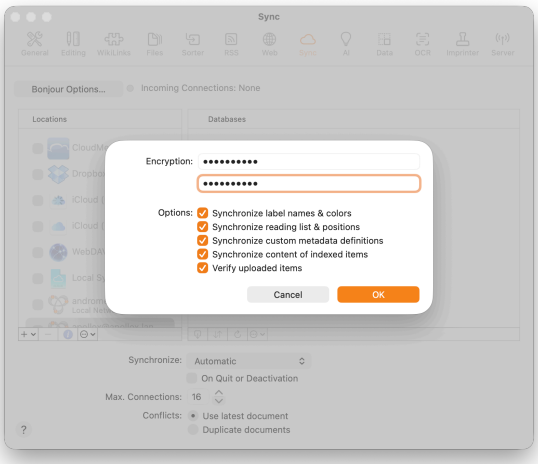
On a second Mac, you have to access the location of the sync store. You will not be creating a new one; you will be adding an existing one.

Setup an existing Local Sync Store:

- **Step 1:** Locate the local sync store (.dtCloud) file in the Finder.
- **Step 2:** Double-click the sync store or drag and drop it into the *Locations* pane in the *Sync preferences*.

- **Step 3:** If an encryption key was used when the sync store was created, select the it in the *Locations* list and press the *Info* button. Enter the appropriate encryption key in both fields, then click away to dismiss the popup.
- **Step 4:** Select the sync location. In the *Databases* list on the right, you will see databases that are open on both devices, e.g., ones you copied over manually. In the *Remote* section, you will see databases that either aren't open or haven't been imported.
- **Step 5:** Enable any *Local* databases you want to sync. If you need to import a remote database, Control-click it in the *Remote* section and choose the appropriate import option, ideally saving to the `~/Databases` directory. Repeat this step as needed.

SYNC: ICLOUD



As most Apple devices are already logged into your Apple ID, iCloud is the simplest method to set up.

TECHNICAL CONSIDERATIONS

There are two iCloud sync methods available in DEVONthink. Both technically behave a bit differently in terms of how the sync data is handled, but the both use the same setup steps.

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 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.

SETUP

Setting up the iCloud sync is the simplest method of all, as you merely enable it and the databases you want to sync. However, whatever option you choose you must use the same method on the other devices,

e.g., you can't set up a Legacy sync on one machine and expect it to sync with a CloudKit sync location on another. On the first Mac…

Setup a new iCloud sync:

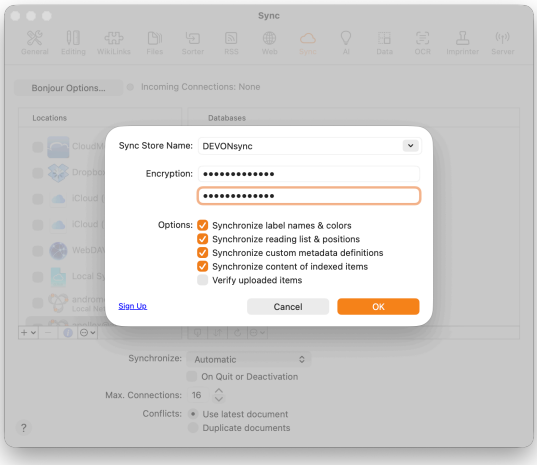
- **Step 1:** Open the Sync settings and enable either the *iCloud (Legacy)* or *CloudKit (iCloud)* option.
- **Step 2:** Enter an optional encryption key and choose the options you want to use. Then click outside the popup to dismiss it.
- **Step 3:** Select the sync location and enable the databases you want to sync in the *Databases* list on the right. If you already synced from another machine, double-click a database in the *Remote* section, saving it to a safe location, e.g., `~/Databases`.

On a second Mac, the setup is essentially the same but you must make sure to choose the same sync method.

Setup an existing iCloud sync:

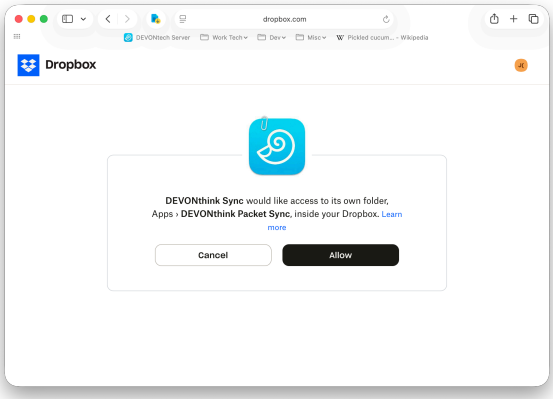
- **Step 1:** Open the Sync settings and enable the iCloud sync option you initially used, either *iCloud (Legacy)* or *CloudKit (iCloud)*.
- **Step 2:** In the sync info popup, if you used an encryption key when you first set up the location, enter it in both fields. Otherwise, leave them empty. Then click outside the popup to dismiss it.
- **Step 3:** Select the sync location. In the *Databases* list on the right, you will see databases that are open on both devices, e.g., ones you copied over manually. In the *Remote* section, you will see databases that either aren't open or haven't been imported.
- **Step 4:** Enable any *Local* databases you want to sync. If you need to import a remote database, Control-click it in the *Remote* section and choose the appropriate import option, ideally saving to the `~/Databases` directory. Repeat this step as needed.

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.

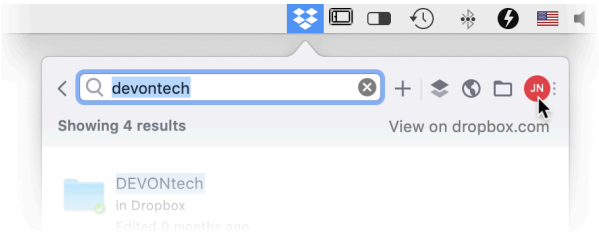
TECHNICAL CONSIDERATIONS



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 your default web browser will open asking if DEVONthink 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.

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

- You can't sync between Dropbox accounts, e.g., between yours and a colleague's account.
- You can't connect DEVONthink 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 stores your sync data.



Exclude Local Sync Data: Also, DEVONthink works directly with Dropbox' servers. It does not sync to the local Dropbox folders on your Mac. In fact, you don't even need the Dropbox application installed to sync DEVONthink with it.

In order to not waste bandwidth and disk space, you need to explicitly change a setting in the Dropbox application's settings.

- **Step 1:** Click the Dropbox icon in the menubar at the top of your screen, then click the account icon and choose *Preferences*.
- **Step 2:** Select the *Sync* tab and click the *Choose folders to sync* button.
- **Step 3:** Select the `Apps` folder, and uncheck the `DEVONthink Packet Sync` folder.
- **Step 4:** Click the *Update* button and okay the removal of the local data.

SETUP

Setting up and using a Dropbox sync is simple but requires specifying or choosing a sync store in the setup. On the first Mac…

Setup a new Dropbox sync:

- **Step 1:** Open Settings > Sync and enable the *Dropbox* option. As noted above, you will be required to authenticate access the first time you set up a Dropbox sync.
- **Step 2:** In the sync setup sheet, enter the *Sync Store Name*, an optional encryption

key, and set any options you need. Then press *OK*.

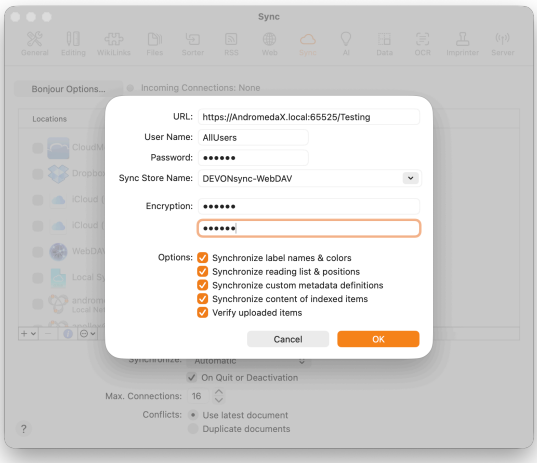
- **Step 3:** When the location is created, select it and enable the databases you want to sync in the *Databases* list on the right.

On a second Mac, the setup is almost the same and you will need to authenticate access to Dropbox once. Make sure you are logged into the same Dropbox account. Remember: you will be adding an existing sync location, not creating a new one.

Setup an existing Dropbox sync:

- **Step 1:** Open Settings > Sync and enable the *Dropbox* option.
- **Step 2:** In the sync setup sheet, click the *Sync Store Name* dropdown and choose the existing sync store. If you used an encryption key when you set it up, enter it in both fields, otherwise leave them empty. Set any options you need then press *OK*.
- **Step 3:** Select the sync location. In the *Databases* list on the right, you will see databases that are open on both devices, e.g., ones you copied over manually. In the *Remote* section, you will see databases that either aren't open or haven't been imported.
- **Step 4:** Enable any *Local* databases you want to sync. If you need to import a remote database, Control-click it in the *Remote* section and choose the appropriate import option, ideally saving to the `~/Databases` directory. Repeat this step as needed.

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 supports WebDAV, a well-known file transfer technology used by many companies, universities, and individuals across the globe.

Cloud services: If you want to explore the options, you can find lists of WebDAV providers online. One we specifically support is a European cloud service, CloudMe.

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

For some, setting up a WebDAV server may be too daunting a task but it's possible to run one directly on your Mac. While we don't develop or offer support for it, this application lets you set up a simple WebDAV server on a Mac: WebDAVNav Server. Choose a folder for your sync store, set up credentials, set up security with a certificate, then start the server. This would be ideal on an always-on Mac mini, but could be used on any Mac.

One technical note: When using this application, you do not need to include the folder path in the *URL* of the sync setup.

TECHNICAL CONSIDERATIONS

Remember WebDAV is a server, so connecting to it is just like connecting to a website using its web address, its URL. And similar to websites that require you to log in with user credentials.

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`.

Credentials: In order to log into the server, you will need to enter your *Username* and *Password*.

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 you're network will require instruction beyond the scope of our help. Check the documentation for the device to see how to set it up.

SETUP

Setting up and using a WebDAV sync requires entering the address of the server, your login credentials, and specifying or choosing a sync store. On the first Mac…

Setup a new WebDAV sync:

- **Step 1:** Open Settings > Sync and enable the *WebDAV* option.
- **Step 2:** In the sync setup sheet, enter the *URL*, *Username*, *Password*, and a *Sync Store Name*. Add an optional encryption key and set any options you need. Then press *OK*.
- **Step 3:** When the location is created, select it and enable the databases you want to sync in the *Databases* list on the right.

On a second Mac, the setup is almost the same but you'll be choosing an existing sync store. Remember: you will be adding an existing sync location, not creating a new one.

Setup an existing WebDAV sync:

- **Step 1:** Open Settings > Sync and enable the *WebDAV* option.
- **Step 2:** In the sync setup sheet, enter the same *URL*, your *Username* and *Password*. Click the *Sync Store Name* dropdown and choose the existing sync store. If you used an encryption key when you set it up, enter it in both fields, otherwise leave them empty. Set any options you need then press *OK*.
- **Step 3:** Select the sync location. In the *Databases* list on the right, you will see databases that are open on both devices, e.g., ones you copied over manually. In the *Remote* section, you will see databases that either aren't open or haven't been imported.
- **Step 4:** Enable any *Local* databases you want to sync. If you need to import a remote database, Control-click it in the *Remote* section and choose the appropriate import option, ideally saving to the `~/Databases` directory. Repeat this step as needed.

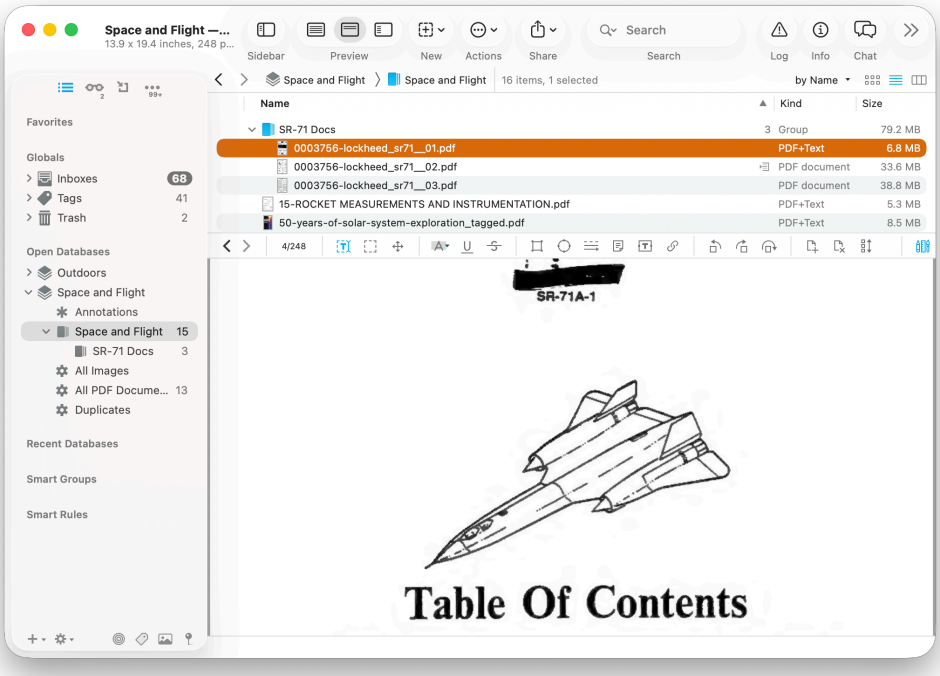
WINDOWS

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DEVONthink uses a number of windows to present information. These windows are used for displaying and manipulating groups and documents, finding information, editing metadata, analyzing text, and changing the properties of your database. This chapter is focused on the different types of windows and descriptions of their components. For more practical uses, please check out the In & Out chapter.

MAIN WINDOW



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

ITEM LIST

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

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

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

- **Icon:** For the more visually inclined, we have the *Icon* view. This displays the thumbnails of the documents with just their name. If you enable *View > Show Details*, it will display some additional metadata about the documents. This is normally used in a *Standard* view or with the View/Edit pane hidden. You can change the size of the thumbnails with

the slider in the information bar below the toolbar. However this will affect the amount of metadata shown as well if the details are shown. Double-clicking groups behaves just as double-clicking a Finder folder, displaying the contents in the current or a new window, depending on the *Double-click opens groups in a new window* checkbox in General > Interface settings.

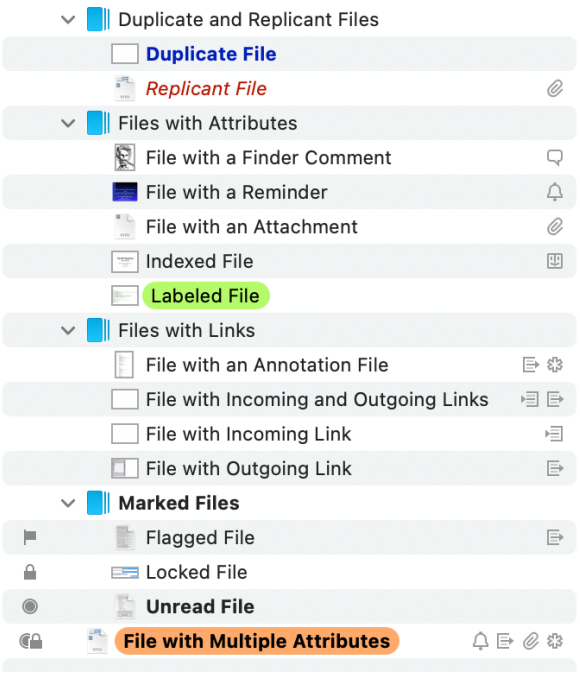
- **List:** Behaving much like Finder's *List* view, the ≣ *List* view shows a list view of the items with metadata columns. Sort them by clicking the column headers, switching between ascending and descending each time you click. Drag the columns left and right to reorder them to your liking. Add and remove columns by Control-clicking and choosing headers or toggling them in the *View > List Columns* submenu.
- **Columns:** The ⫼ *Columns* view functions in the same way as the Finder, displaying sibling items in columns. For example, selecting a group shows its contents in the next column. If you use *View > Show Details*, a column appears to display metadata and the document's thumbnail. You can resize the width of columns by dragging the separator line between them. Double-clicking the separator expands the column to the width of the widest title and holding the ⌥ Option key expands all columns. To make this easier you can set macOS' *System Settings > Appearance > Show scroll bars* to *Always*. This view typically works best with a preview in *Standard* layout as the item list's width in *Widescreen* usually only shows the current column.

All these views can be easily changed in the *View > View* options, as well as the trio of icons ⁘ ≣ ⫼ on the right-hand side of the Information bar.

Sort: In addition to sorting the item list by clicking column headers or using the *View > Sort* menu, you can also choose a sort method in the *Sort* dropdown menu in the information bar. The default is sorting *by Name*. If you feel there are too many options available, choose *Customize Metadata* in the *View > List Columns > Customize Metadata*, the context menu, and this button. A panel opens listing all the available properties. Toggle the options you want to be able to choose as a sort method.

VISUAL CUES

DEVONthink provides some visual cues applied to items in the item list. These are also described in the Iconology section of the Appendix.



Duplicates and Replicants:

- **Duplicates:** Display their name emboldened in blue or with the icon, depending on your setting in *Settings > General > Mark duplicates and replicants in color*.
- **Replicants:** Display their name in red italics or the icon, again depending on the preference setting.

Files with Attributes:

- **Finder Comment:** Displays a small speech bubble property icon.
- **Reminder:** Displays a small bell property icon.
- **Attachment:** Displays a paperclip property icon. Generally seen on email and RTFD files.
- **Indexed:** Displays a small Finder property icon.
- **Labeled:** Displays a chosen color on or near the filename depending on the *Label* option chosen in Settings > General > Appearance.

Files with Links:

- **Annotation File:** Displays an asterisk property icon as well as an outgoing link icon.
- **Incoming Link:** Displays a property icon of a lined square with an arrow pointing inward from the right.
- **Outgoing Link:** Displays a property icon of a lined square with an arrow pointing outward to the right.
- **Incoming and Outgoing Links:** Displays both the incoming and outgoing link property icons.

Marked files are ones with item attributes found in the *Data > Mark* menu. In *List* and *Columns* views, the property icons will not be shown unless the *Flag* option in *View > List Columns* is enabled.

Marked Files:

- **Flagged:** Displays a flag property icon.
- **Locked:** Displays a lock property icon.
- **Unread:** Displays a dot property icon and the name in bold. Groups containing unread items will also display their names in bold.

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

As illustrated above, DEVONthink displays special property icons to the right of item names for attributes like Finder Comments, reminders, etc. A key of the property icons is in the Iconology section of the appendix.

Context menu: The available context menu commands depend on the current selection in the item list. As there are many commands, they are described separately in the Context Menu > Item List section of the Appendix.

> Note: To maintain visual consistency and make some functions more broadly accessible, item lists are used throughout DEVONthink's interface, so you'll see them in some other places, e.g., the *AI > See Also* inspector.

VIEW/EDIT PANE

When You launch DEVONthink you will see an empty pane at the bottom of the window reading *Nothing Selected*. This is the *View/Edit* pane, a core element in the interface you will likely use very often. This pane is where you can view documents and edit compatible formats, e.g., rich text. You can also view the documents in a selected group if you have *Behavior: Preview group content* enabled in the *General > Interface* settings. You can can toggle the pane's position or visibility in the *View > Preview* menu or via a toolbar button. The menu options are:

Layouts:

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

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

TOOLBAR

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

The toolbar comes pre-installed with a handy default set of buttons, including the search field (see below). It can be customized via *Tools > Customize Toolbar* command or in the context menu of the toolbar. Add, remove, and reorder these items to suit your particular needs. On a side note that also applies to Finder windows, if you want to quickly reorganize items on the toolbar, hold the ⌘ Command key and drag the item to its desired location, or off the toolbar to remove it.

If you're looking for a little more space for your toolbar, or even a little less, you can choose to display the toolbar as *Icon and*

Text, *Icons Only*, or *Text Only*. If you choose *Icon Only*, the current selection's database and name will not appear. And if you want to go fully minimal, *View > Hide Toolbar* hides the it completely.

You will find a list of the available toolbar items is available in the Toolbar section of the appendix.

SIDEBARS

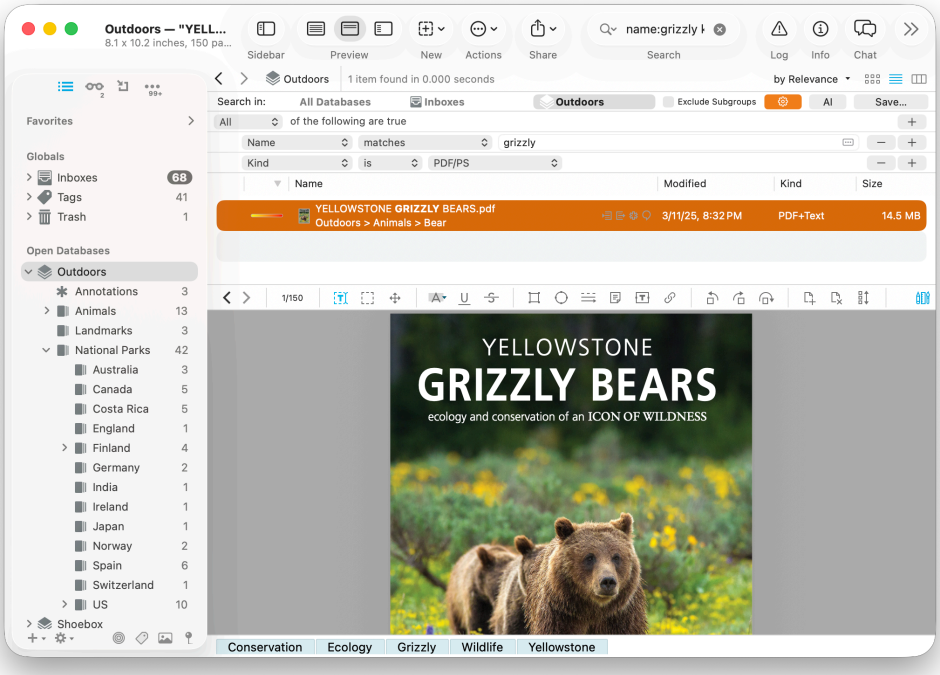
Seen in scores of applications for many years, a sidebar is a top level organizational structure, typically found on the left side of an application window. The Finder or Apple Mail sidebars are perfect examples of this. Looking at them, you should see the immediate similarities with DEVONthink. However,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

INSPECTORS

In some applications, extra information about files is shown in a pane on the right side of a window. DEVONthink has several inspectors providing a wide range of information and commands, separated into related views. For example, data about the name, tags, type, etc. of a selected file are available in the *Generic Info* inspector. The various inspectors are gathered into one pane displayed on the right side of main and document windows alike, especially helpful on smaller screens.

The inspectors are individually discussed in the Inspectors chapter.

SEARCH PANE



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

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

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

- **Live while typing:** Enable this option to search while typing or disable it to search only when you press ↩ Return.
- **Partial matches while typing:** This option assumes an asterisk wildcard at the end of the last search term. That term is only matched as the beginning of a word. For example, typing "sync" is used as `sync*`, matching "synchronize" or "syncing" but not "resync". Enabling this option also activates *Live while typing* so the results dynamically change as you type. Press the ↩ Return key to treat the last term as a complete word.
- **Ignore Diacritics:** Ignores special marks on letters, like umlauts or accents.
- **Fuzzy Word Comparison:** This uses fuzzy-logic to expand the possible matches DEVONthink makes, typically misspelled words. For example, `hello` and `hullo` would be matched.
- **Related Words:** Attempts to match documents that are contextually related

to the search terms, as is shown in the *Related Words* section of the *Concordance* inspector. For example, if you have several documents about different types of fish and searched for `text:fish` the matching documents would likely also highlight various species mentioned. Note this option will not work with *Partial matches while typing* and *Fuzzy Word Comparison* enabled. Also, smart groups do not support this option.

There is also a hidden preference, EnableSearchFieldAutocompletion, to allow DEVONthink to try to automatically complete words you're typing. However, this option only works when the search options *Live while typing* and *Partial matches while typing* are disabled.

Search prefixes: Anything you type into the search field will be treated as searching in all possible attributes. However, if you want to focus on specific attributes, e.g., file types or tags, the search field supports prefix operator searches, similar to Spotlight. Common examples are searches like `name:DEVON` or `tags:tech;sync`, separating multi-valued attributes like tags with a semicolon. There are a wide variety of prefixes available, as well as different prefix operators. A complete list of these items is included in the Search Prefixes section of the appendix.

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

Search scopes: After you've done a search, you will also see a bar above the search results allowing you to choose the scope of the search. The scope specifies "where" you're searching. You will be shown *All Databases*, *Inboxes*, the name of the current database, and the name of the current group, if you're currently viewing one. Choose one to expand or limit where DEVONthink is searching. For quickly switching scopes with a keyboard, hold the ⌥^ Control keys and press `1` through `4` while a search is active. If you are searching in a particular location and want to ignore possible matches in the subgroups, enable the *Exclude Subgroups* checkbox, as needed.

Advanced searching: To the right of the search scopes, click the ⚙ button to open the *predicate editor*, similar to what is used in *smart groups* and *smart rules*.

If you have done a search you'd like to use again, press the *Save* button. Enter a name and DEVONthink will create a smart group for you. If your search scope is in a group, the smart group will be created there. If you are searching a specific database, the smart group is created in the root of the database. Searching inboxes or all databases creates a global smart group, shown in the *Smart Groups* section of the*Navigate sidebar*.

AI: The *AI* button opens the *Search Assistant*. This popover lets you describe your search naturally, as if you're talking to someone. For example, "Show me markdown documents that mention turtles." This will be processed with AI and provide the DEVONthink-specific raw search syntax, e.g., `kind:markdown text:~turtles`. This popover requires an active *AI* model in order to it.

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

PATH BAR

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

Each item in the crumb trail is a live link, so you can click it to jump to any parent group or back to the top level of the database. Long-press a group to show its sibling groups. Or open the context menu via a Control-click an item to access them but also an *Open* button to open the group in a new main window or *Reveal* to open a new window with the group selected.

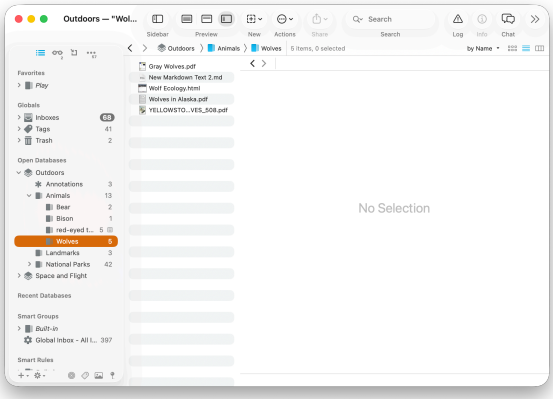
This bar also has < and > buttons so you can navigate back and forth between locations you've visited in this window. Bear in mind, these buttons only relate to the history of the specific window. If you open a new window, it will have no history so the buttons will not function until you've navigated to some locations. As an added feature, click and hold one of these buttons to be shown a list of previous locations you've visited, just like in a web browser.

INFORMATION BAR

Another specialized bar, the *Information Bar* displays the number of items selected and the total number of items in the current location. As mentioned previously, this bar also hosts the *Sort* dropdown and the view icons.

SIDEBAR: NAVIGATE

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



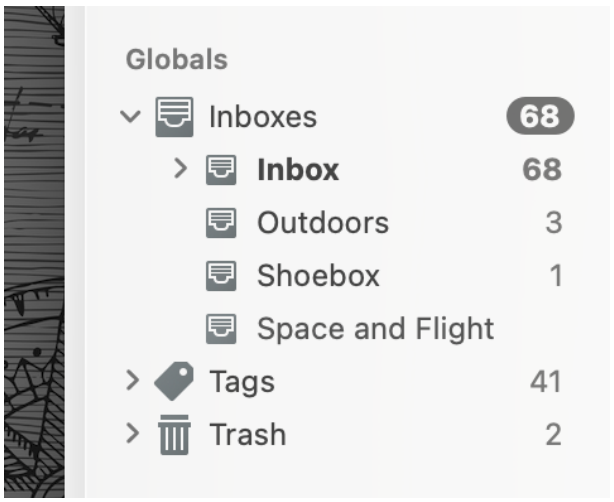
Each section in the Navigate sidebar has its own specific purpose: giving you access to frequently used files, navigating database groups, or viewing a list of similar files. The sidebar will only show databases and groups. Selecting one of these items will display its groups and files in the item list. This allows a clear view of the group structure in the sidebar, while still allowing you to interact with the contents in the item list. Alternatively, you can view the group hierarchies directly in the sidebar. Excluding smart groups and smart rules, selecting multiple items will show a union of their contents in the item list.

The sections in the Navigate sidebar can be dragged to reorganize them as desired. Sections you don't need to use as often can be collapsed to reclaim the space or to provide a bit of privacy.

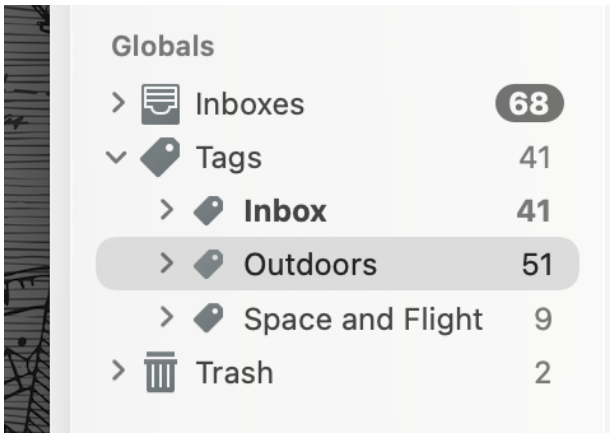
UNIFIED ELEMENTS

By default, specific parts of databases are shown gathered in specific sections, similar to how Apple Mail displays the inboxes of all accounts in the same section.

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



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



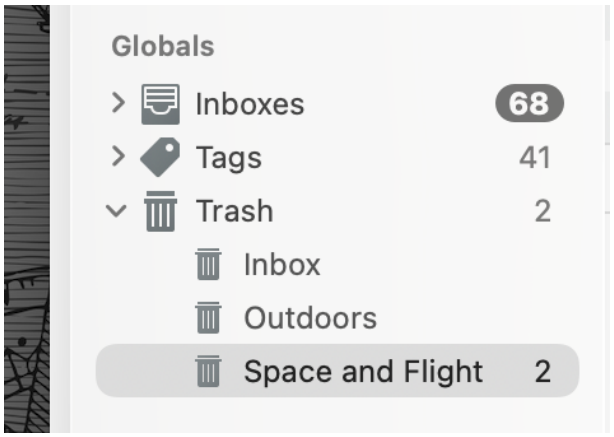
Tags: The *Tags* section provides quick access to all the tags you are using or tags within individual databases. If you click the top level tags, the item list will display all the tags you've created. Open this group and click on a database's name to show its tags. If you like to create nested or hierarchical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

Typically you will use the *Tags* bar in the *View/Edit* pane or the *Info Inspector* or *Info* popup to apply or create tags. You can also drag items in your database to the individual tags. When you create a tag it will automatically appear in the *Tags* group of the database you're in. If you want to create new tags to be used later, select the *Tags* group for the database and choose *Data > New >*

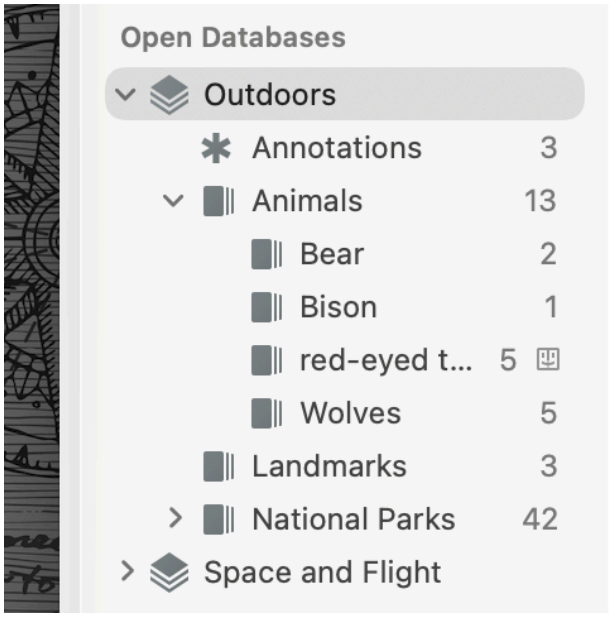
Tag. Or from the context menu, Control-click the database's top level *Tags* group or an existing tag and select *New Tag*.

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

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



Trash: Every database has its own individual trash. This allows you to see, and potentially retrieve, items you've deleted from your individual databases. Just as with the real-world trash bin, we do suggest you empty your databases' trash regularly. It is not meant as another filing location, and items marked as *missing* will still register as a problem for a database. Select the trash, the top level or individual database's trash, and choose *DEVONthink > Empty Trash*. The command is also available in the context menu, when Control-clicking a trash. Trashed files are not deleted completely from the machine but are put into the system trash.



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

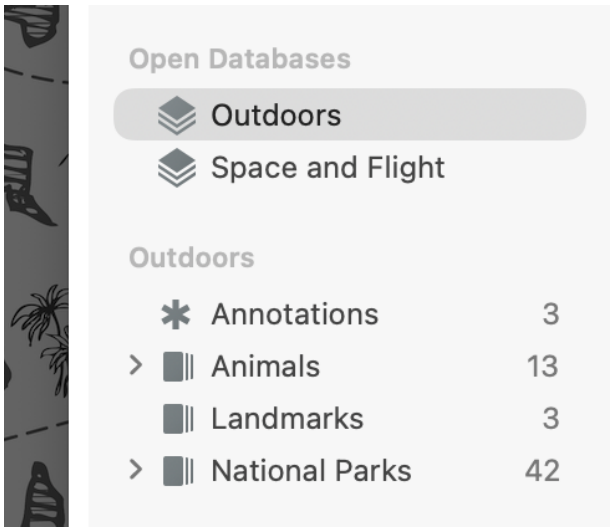
NON-UNIFIED ELEMENTS

As the unified views may be less comfortable for some people, DEVONthink allows you to decide what database elements you want to unify. Controlled by options in Settings > General > Sidebar, you can enable or disable unifying: *Inboxes*, *Tags*, or *Databases*.

Inboxes: If you disable unifying the inboxes, only the Global Inbox will be shown in the *Globals* section. The inboxes of individual databases will be shown in the item list when the database is selected.

Tags: Similar to the inboxes, disabling this option will display the Tags group with other elements in the selected database.

> Note: With Unify Inboxes and Tags both disabled, the database's contents will appear similar to how DEVONthink 2 displayed databases.



Databases: When disabled, DEVONthink displays a database's name in the *Open Databases* section of the sidebar but the contents will be shown in a separate section. The current database will be marked on the left by an asterisk `(*)` and its groups will be shown in a separate active database section in the sidebar. This creates an isolated view of that database regardless of the number of databases that are open. Interacting with elements in the active database section displays contents in the item list, similar to the Three Pane view from DEVONthink 2.

For switching between active databases, select another database and the active database section will display only the groups and smart groups of that database. Also, there are *Previous Database* and *Next Database* commands in the *Go* menu.

When using the keyboard, hold the Command key and press the up and down arrows to view the contents of another open database in the item list while showing the contents of the previously active database in the active database section. Press ⇧-↩ to change the active databases section to the currently selected database.

FAVORITES

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

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

Favorited groups behave just like normal groups, so you can drag items into a one for quick filing. Use the ⌥ Option key and ⌘⌥ keys to duplicate or replicate items while dragging and dropping to them.

RECENT DATABASES

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

SMART GROUPS

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

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

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

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

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

For more information on editing smart group properties, global or local, see the *Smart Group Editor* section of this chapter.

SMART RULES

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

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

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

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

- **Bates Number:** A specialized rule that adds the current database's name and a Bates number to a filename. The original name is preserved as a document alias.
- **Download Bibliographic Metadata:** Examines a PDF document and attempts to extract metadata based on it's Digital Object Identifier (DOI). The document will be renamed per its title and various bits of metadata may be added, e.g, ISSN, Journal, etc., if found.
- **Filter Duplicates:** Automatically puts duplicated items in a database's trash when you import them.
- **Reminders:** Displays the name of a document and plays the system "glass" sound when a reminder on a matched item triggers.
- **Unify Names in Dates:** Detects dates in a filename, retrieves the filename without the date, the renames the file prefixing the filename with the detected date as `YYYY-MM-DD`.

- **Apply Chat Suggestions:** A template smart rule applying certain AI-derived values, e.g., tags, title, or some custom metadata. Duplicate and modify this to suit your own needs.
- **Notification with Summary via Chat:** When used with the event trigger, newly received RSS articles are examined for urgency and if so, they are summarized in up to 10 words. The summary is then displayed via the macOS Notification Center.
- **Rename to Chat Suggestion:** Uses a document's text passed to your default AI model to rename the file with a suggested title.

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

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

In the context menu for a smart rule, notice there is also a smart rule-specific command: *Apply Rule*. This runs the clicked command on any matching files. This means it will performs its actions, even if the event trigger is not set to *On Demand*. Be cautious about using this command unless you are certain you want to affect all matched items. There is also an option to copy the item link for a smart rule by choosing *Copy Rule Link*.

Also when you Control-click a selected smart rule, you will see a *Disable Actions* or *Enable Actions* option, depending on the state of the selected rules. Use this to toggle the active state of any selected rules. This can be useful in debugging situations.

There are two commands in the Tools menu related to smart rules:

- **Tools > Apply Rules:** This runs the actions of a chosen rule on selected items, but only ones matched by the smart rule.
- **Tools > Perform Rules:** This performs the chosen rule as defined, not acting on the selection.

Drag and Drop: Lastly, you can drag and drop items onto smart rules to apply their actions to them. Dropped items will be acted on, ignoring the location and criteria specified in the smart rule. For example, you may have a smart rule to add the date to the beginning of the name of images imported into your Global Inbox. However, you could drag and drop a rich text file from a separate database on to the smart rule and the date would be prefixed to the name, even though the location and file type do not match the rule.

For more information on editing smart rules, see the *Smart Rules* section of the Automation chapter.

ORGANIZING YOUR CUSTOM ITEMS

As you add more and more favorites, global smart groups, and smart rules, you may want to organize them for clarity and efficiency. Control-click anywhere in each section and choose *New Group*. The group is created and ready to be named. Now you can drag and drop the items into their respective groups to more logically group them and minimize visual clutter.

CONTEXT MENU

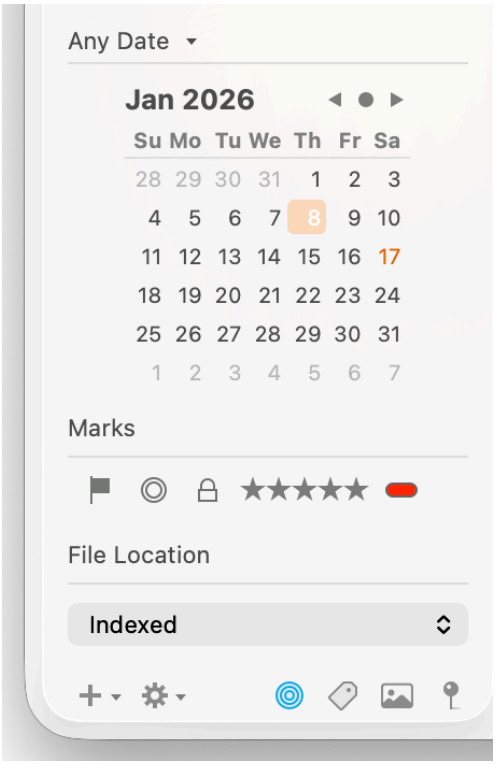
As there are many commands in the context menu of this sidebar, please see the Context Menu > Navigate Sidebar section in the Appendix.

SIDEBAR: FILTERS

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

INFO

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



Dates: Click the *Date* dropdown to choose the type of date you want to filter on: *Added*, *Created*, *Modified*, *Opened*, or *Due*. Click on a date in the calendar display to only show files related to the day and type of date

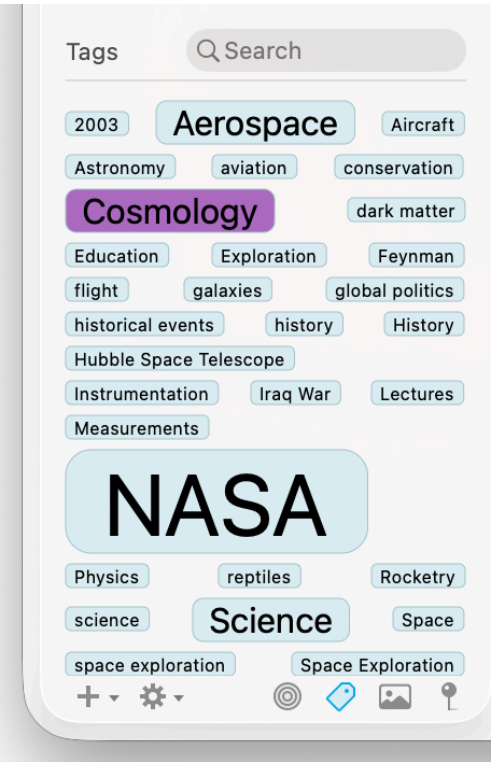
you selected. Use the small arrows to move backward and forward through time, and click the circle between them to quickly return to the last selected date.

Marks: Choose the type of mark, or a combination of them, on which you want to filter. For example, you can click the flag and a rating of 3 to show only those files. You can filter on these attributes: *Flagged/Unflagged*, *Read/Unread*, *Locked/Unlocked*, *Rating*, or *Label*.

File Location: Click the dropdown to choose whether to display *Imported*, *Indexed*, or both with *Any*.

TAGS

Choosing the *Tags* filter via *Tools > Filter > Tags* displays a tag cloud derived from the tags applied to items in the current location. This makes it easy to identify commonly used tags.



To filter the files, click any tag. You will immediately see the tag cloud reduce in number and only related tags are shown. This allows you to drill down into files that share common tags, but also exposes tags that have been used with the previously selected tags. If there are no tags on the files in the current item list, *No Tags* will be displayed.

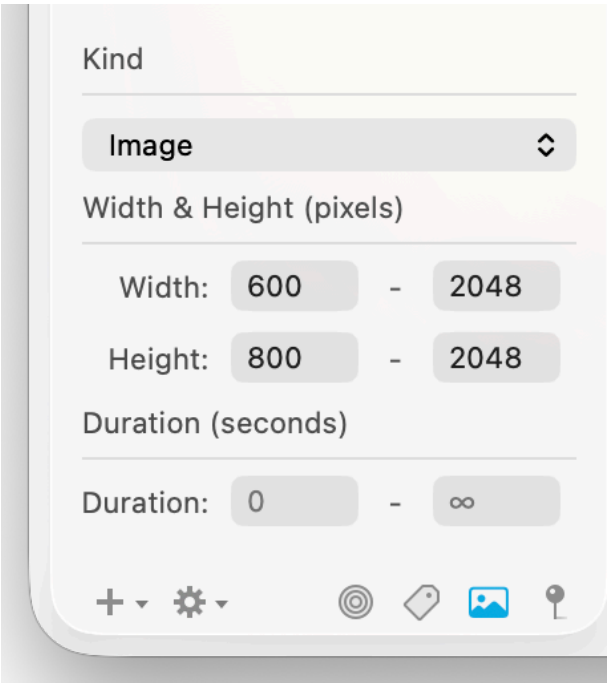
> Note: The tags you choose will also be shown in the *Information* bar above the item list. Hovering over one of these tags displays a ✕ close button at the right side of the tag. Click it to stop filtering on that tag. You can also press the *Reset* button to clear all filtered tags.

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

- **Reveal Tag:** Displays the tag in the database's *Tag* group.
- **Remove Tag:** Removes the tag from database's *Tags* groups and also from any document it was applied to.
- **Related Tags:** Displays the top two tags most commonly used with this tag. Selecting a tag from this list filters the files on that tag.
- **Sort:** Allows you to sort the tags by name or count.
- **View>:** Allows you to switch between cloud and list view. In cloud view, the size of the tag indicates a higher or lower number of documents with that tag. The more items with a given tag, the larger it displays.

MULTIMEDIA

Open the *Multimedia* filter via *Tools > Filter > Multimedia* to present options for filtering out multimedia files, e.g., images, audio, and video in the current location.

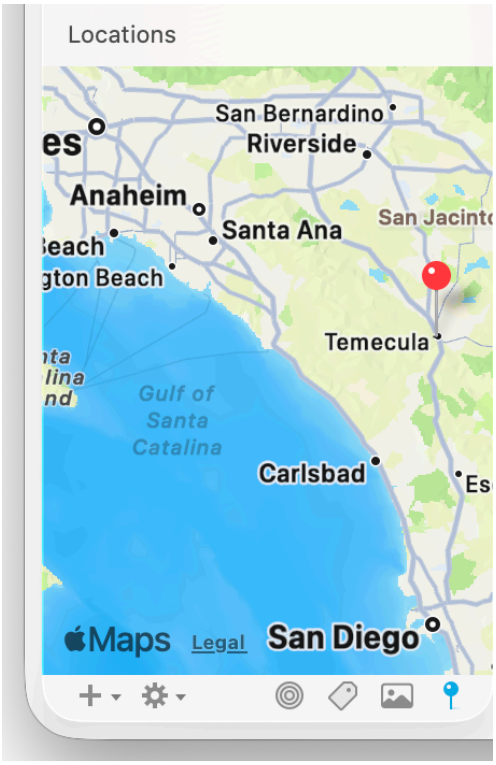


To assist in filtering, these controls are available:

- **Kind:** Select the kind: *Any*, *Image*, *Video*, or *Audio*.
- **Width & Height (pixels):** Set a minimum and/or a maximum pixel dimension for the width or height of images. Selecting and pressing the Delete key in a field will reset it to zero or infinity (no maximum specified).
- **Duration (seconds):** Set a minimum or maximum length of a video or audio file, defined in seconds, e.g., `900` for 15 minutes (15 minutes x 60 seconds).

MAP

Utilizing geolocation data from your files, the *Maps* filter shows documents related by their location.

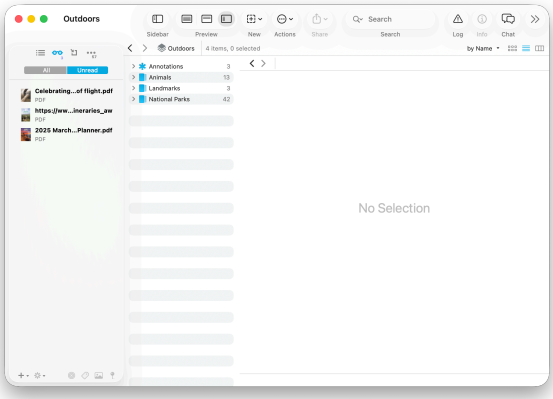


Open this filter pane via *Tools > Filter > Maps*. By default, the data used is based on where a document was created. However, this can be modified. See the *Geolocation* field in the *Info Inspector* for more information on this.)

The map functions similar to Apple or Google Maps, allowing you to use familiar pinch gestures or double-click or Option-double-click to zoom in and out, panning, etc. The map shows pins for all documents with geolocation data in the selected location in the Navigate sidebar. Selecting a pin in the map displays the files with that geolocation data in the item list.

SIDEBAR: READING LIST

With the seemingly perpetual growth of our databases, we often add more items than we can reasonably process at the moment. Similar to the sidebar section found in Safari (and many other browsers), DEVONthink's *Reading List* provides a place to access documents you've "set aside" for later consideration.



There are two views in this sidebar: *All* and *Unread*. The latter lists only unread items and purges items from the view as soon as they're viewed in the *Reading List*. The former lists every regardless if they've been viewed or not.

A simple way to set aside a document is via drag and drop when the sidebar is visible. If it's not open, you choose the *Data > Add to > Reading List* menu item. This command may also be available when Control-clicking items in other places, like the item list. Newly added items are displayed at the top of the list in the *Unread* view.

Items in the *Reading List* function like the items they're pointing to. This means they can be moved to other locations by dragging them to other locations. This includes duplicating or replicating while holding the ⌥ Option key or ⌥⌘, respectively.

CONTEXT MENU

The context menu displays these item-related commands:

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

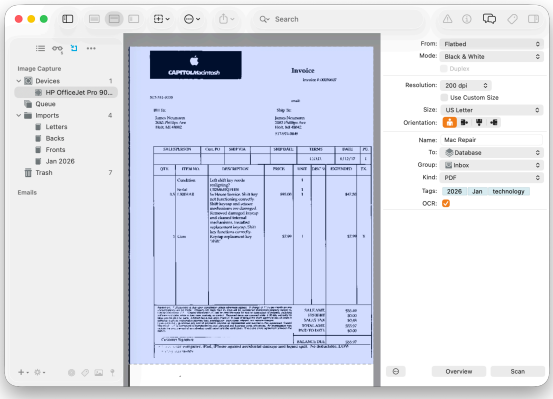
There are also two commands specific to the *Reading List*, noting these items can't be undone:

- **Remove Item:** Removes an item from the *Reading List*.
- **Clear All Items:** Removes all *Reading List* items.

For those interested in automation, you can use the special item link `x-devonthink-item://readinglist` to open the *Reading List*.

SIDEBAR: IMAGE CAPTURE

The *Import* sidebar pane gives you access to two common sources of external data: scanning and email. Each section in this sidebar provides controls to import from any supported scanner or a compatible email client, e.g., Apple Mail or Outlook. This makes DEVONthink a reliable companion at home, in an office, in the hands of an archivist, and many other scenarios. We will cover the scanning controls in this section. We have also provided a more practical overview in the Going Paperless in DEVONthink section.



Scanning documents is an important function in many situations. The *Image Capture* section of this sidebar provides a variety of scanning controls to help you create a searchable, paperless archive of your documents.

SCANNING CONTROLS

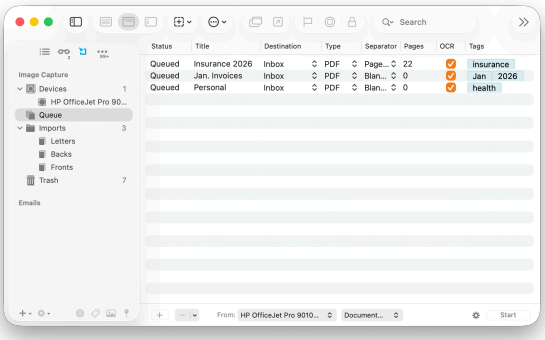
The *Devices* section allows you to choose and control a non-ScanSnap, Image Capture-compatible (ICA) scanner.

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

- **Overview:** The overview of what's being scanned. When using a *Custom Size* you will define the scan area in this pane.
- **From:** Choose where you'll be inserting the paper into the scanner, *Flatbed* or *Document Feeder*.
- **Mode:** Choose the color type: *Black & White*, *Grayscale*, or *Color*. For text only documents, black and white is a good choice.
- **Duplex:** Enable double-sided scanning, if available on the scanners.
- **Resolution:** Set the desired resolution of the scan. 200 dpi is sufficient for most cases.
- **Size:** Choose a pre-defined page size e.g., *A4*, or check *Custom Size* and manually resize the scan area in the overview. It is possible to drag multiple scan areas on the same scan. You can also enter specific measurements. Note switching to a pre-defined size will clear any custom scan areas.
- **Orientation:** Change the orientation of the final document, portrait or landscape.

- **Name:** Enter a name for the final document. If left empty, a date stamp will be used as an automatic name.
- **To:** Choose where to send the document: *Imports*,create a new binder or use an existing one, or a group in a specific database.
- **Destination:** The chosen location in a database will be shown here. You can also choose a location to send binders to when saving.
- **Kind:** Choose the format for the final document, e.g., *PDF* or *TIFF*. Multi-page scans must use *PDF*.
- **Tags:** Enter optional tags to be applied to the document.
- **OCR:** Enable OCR for the scan, if desired.

QUEUE



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

- **Scanner:** Choose an available scanner.
- **Flatbed/Document Feeder:** Choose where you'll be inserting the paper into the scanner.
- **Job List:** Scan jobs and their parameters are listed here.
- **Add/Delete:** Add or delete scan jobs.
- **Remove Sent/All:** Remove already processed or all scan jobs from the list.
- **Configure:** Set the global options for the color type, resolution, page size, and duplex scanning.

IMPORTS

This section contains individual scans or binders, collections of scanned pages. Process existing scans, create new binders, or modify existing binders.

- **Document List:** The main view of the imports displaying a thumbnails of scanned images and existing binders.
- **Create new Binder:** Click to create a new empty binder.
- **Properties:** Press to change properties of a selected scan or binder, e.g., where the scan will be sent, the title, type, tags, and optionally enabling OCR. You can also add a *Author* or *Subject* for PDF output.
- **Edit:** Click to change the page orientation or make image modifications on a selected non-PDF scan. If the scan is an image, double-click it to display the image modification pane. Press Revert or Done, as needed.
- **Delete:** Press to delete selected scan(s)
- **Save:** Processes selected scans or binders into their final documents.

Select a specific binder in the sidebar to show a thumbnail view of the pages it contains. Rearrange the pages by drag-and-drop or drag pages from one document to another. Press the ☰ button to use these options:

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

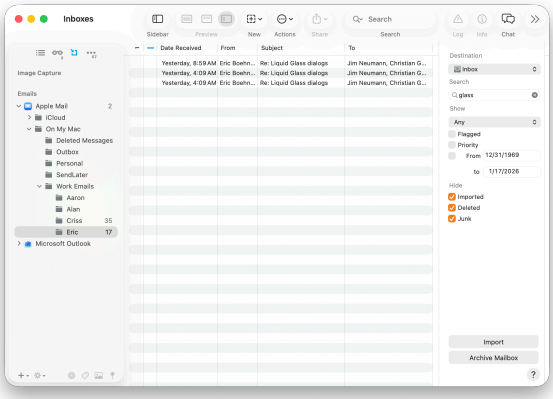
TRASH

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

SIDEBAR: EMAIL

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

Open the *pane* pane by choosing *View > Import*. Here we discuss the controls used in this section.



ACCOUNTS AND MAILBOXES

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

Mailbox View: When you select a mailbox in a specific account, the window will display more controls for filtering and importing messages from that mailbox. The central view shows the contents of a chosen mailbox. This is where you can select individual messages to import, if desired. This view is separated into columns that can be sorted by clicking the column headers. The basic columns include *From*, *To*, and the *Subject*. If you are choosing to show already imported messages, there is a special column showing those items. For emails marked as high priority, the flagged column will also show two exclamation points and the subject, etc. will show in red. Control-click in the this view to refresh its contents or import selected emails.

FILTER AND IMPORT

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

Destination: Choose the destination database for the imported messages or mailboxes. Note: You can choose a specific group in a database when using the *Import* function. However, you can only choose a specific database, and not a group, when using the *Archive Mailbox* function. Emails are archived into a special *Emails* group at the root of the specified database.

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

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

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

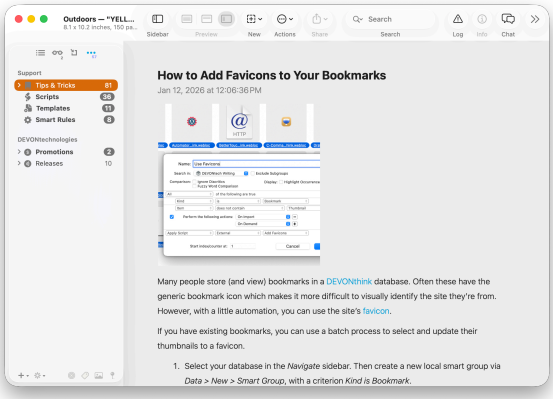
Hide: Use these controls to hide certain items from the mailbox view. All these options are enabled by default, but can be selectively disabled, if needed. However, when these options are enabled it makes it easy to see only new messages, ready for import.

- **Imported:** Enabled by default, this hides messages you've already imported into the current database. As you can't import the same message into a database multiple times, changing the *Destination* changes what messages are displayed when this option is enabled. If you disable it, already imported messages will show a checkmark next to their name
- **Deleted:** Hide messages you've put in the account's trash.
- **Junk:** Hide messages moved to the account's junk mailbox.

The last two items are buttons for importing selected emails from the *Mailbox* view or archiving the currently selected mailbox. For a practical overview of the email archiving process, check out the Archiving Email section of the In & Out chapter.

SIDEBAR: EXTRAS

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



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

- **Tips & Tricks:** This shows recent blog posts of handy tips about all things DEVONthink, presented in a RSS feed style. To read the full article, click the article's title.
- **Scripts and Smart Rules:** From time to time, we publish publicly available scripts and smart rules. You will see a brief description and a link that allows you to install the script directly from this section.
- **Templates:** We also offer templates for a broad audience. This section lists recently published ones. As with the scripts and smart rules, a description and installation link is provided.

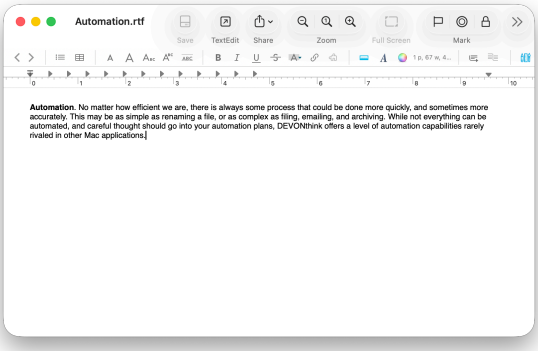
If you'd like to quickly mark all items as Read, Control-click and select the *Mark All as Read* from the context menu.

For another view of the available scripts, rules, and templates, as well as easy installation and uninstallation, see the *Support Assistant*.

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

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

DOCUMENT WINDOW



If you want to focus on a specific document, you can use a document window. Double-click a document in the item list to open it in a document window. Alternately, choose *Data > Open* or the *Open* command from the context menu. The document opens in its own window, isolated for editing, reading, etc.

These windows are great for concentrating on a single document but are also convenient for split screen work, allowing you to view individual documents easily at the same time. And document windows support Inspectors so you can access specific tools like the *Thumbnails* inspector while reading a PDF, for example.

Bear in mind, many documents can be displayed in document windows but that doesn't mean they're editable. However, you can still view and potentially *search* such documents in one document window while editing another in a separate window. For more information on what formats are natively editable, see the Documents chapter.

Toolbar Items: Similar to a main window, a document window has a toolbar at its top. The default toolbar buttons may vary, depending on the type of file being viewed in the window. You can customize the toolbar via *View > Customize Toolbar*, but note there are fewer options than you have with a main window. A list of available toolbar items is available in the Toolbar Items section of the appendix.

If the title is displayed in the toolbar, Command-clicking it shows the document's location, including the database it's stored in. Use this to jump out to a containing group or just to quickly determine the document's location.

THE SORTER

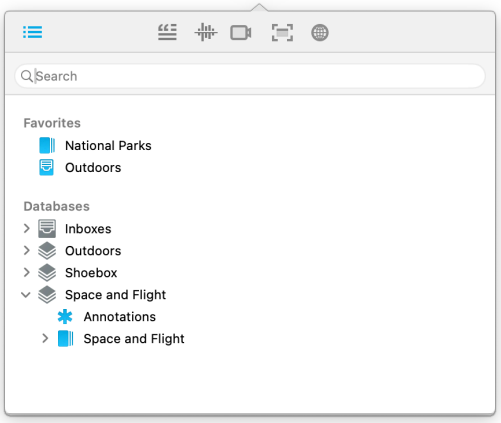
The *Sorter* is a multi-purpose popup that allows you to quickly add content to your databases, even when DEVONthink isn't the active application. Depending on the option you choose in *Settings > Sorter*, it will appear in the menubar at the top of your screen or docked to the left or right side of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

The *Sorter* can be opened manually or you can jump directly to certain views via hotkeys you set in the settings. For example, setting a hotkey for *Copy Selection* opens the *Take Note* view with the selected text already added. Once the *Sorter* is open, you can switch between these views by clicking the icons at the top of the pane. Alternately, hold ⌥⌘ and press 1 through 6 to quickly open a specific view, e.g., pressing 4 opens the *Video Note* view as it's the fourth view available. Below we cover the different views the *Sorter* provides for quickly capturing data.

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

NAVIGATION

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



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

- **Search Field:** Use the search field to help quickly locate specific groups. This uses substring matching, so you can enter parts of words to find matches. The view updates while you type for efficient searching.
- **Favorites:** Provides a convenient list of the groups you've added to the *Favorites*

section of the global sidebar. Drag items onto your favorites to import them. Control-clicking a group or database gives you the option to *Reveal* or *Open* the item. You can also double-click an item to open it in a new window.

- **Databases:** Provides a list of open databases and access to their groups. Behaves in the same way items in your *Favorites* do.

Hotkeys: The Navigation view supports these keyboard navigation with these keys:

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

CREATING FILES

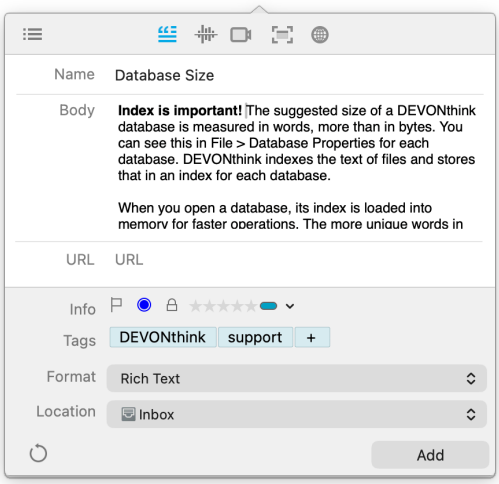
The remaining views are focused on creating documents, whether that's a simple plain text file, a screen capture of an application's window, recorded video, or clipping web content. Every view supports these options:

- **Add:** Saves the file in the specified format in the chosen location. You can also press ⌘S to save the current content.
- **Reset:** Displayed as a ⟲ backward pointing circular arrow, click it to clear the view to its default settings.
- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.
- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Location:** Choose the location to save your file from the dropdown list. The location of the last saved file will be preserved for the next note you create.

And whenever these controls are shown you can move the cursor forward between fields, e.g., between the body and URL, by pressing ^⇥. Hold the ⇧ Shift key to cycle backwards through them.

TAKE NOTE

The *Take Note* view is for those times when you just need to quickly write a note but don't want to go back into your databases just to create a new file. And to make your note taking a little faster, define a *Take Note* hotkey in the *Sorter* settings.



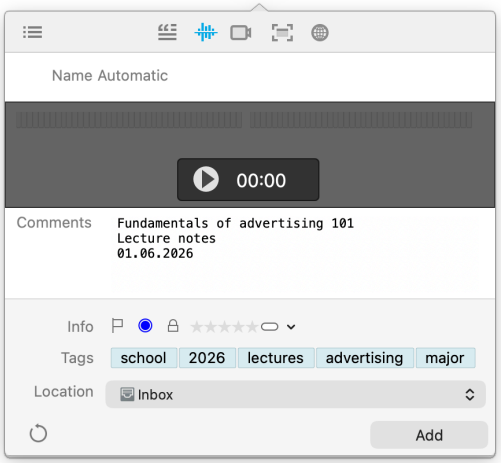
Allowing you to write notes in several formats, the editing behavior depends on the format you've chosen. Also, the appearance of the text depends on the your choices in the *Editing* settings. This view supports these specific attributes:

- **Name:** The title of your file. If left as *Automatic* DEVONthink will attempt to create a title from the first sentence of the body.
- **Body:** Enter your note text here.
- **URL:** If there is a URL you'd like to associate with the file, perhaps a link back to a source, enter it here.
- **Format:** Choose the format of the saved note. Choose from: plain text, rich text, formatted note, and Markdown.

If the Sorter is set to *None* in *Sorter* settings, it will appear as a separate floating panel having the same functions described above. However, it has the added feature of hovering over any open windows.

VOICE NOTE

Use this view to record a voice note directly into your database. This creates recording in `.m4a` format, saved to the location of your choice. With simple controls, it's easy to record impromptu audio.



This view has a few simple sections:

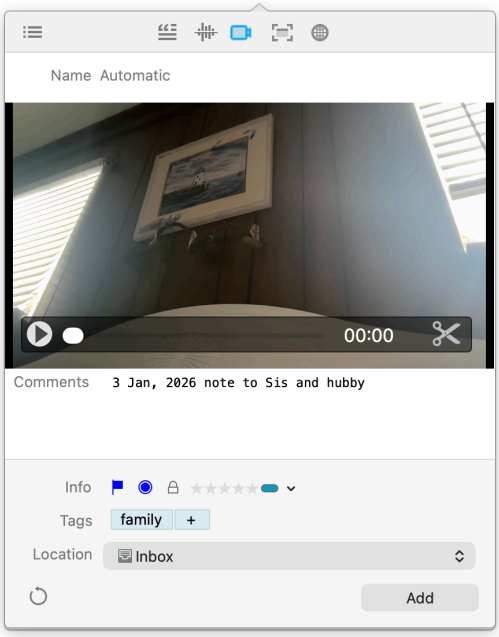
- **Audio Levels and Timer:** At the top is a sound meter to help visualize your audio level as you record. The elapsed time is shown as it records, convenient for projects like rehearsing a presentation.
- **Begin/Stop Recording:** Press the red circular button to begin recording. Press the black square button to end recording.

When you've stopped recording, you will be shown these view-specific options:

- **Name:** Enter a name for the audio file. If no name is provided, a date and timestamped name will be automatically given.
- **Playback and Volume:** Playback your audio to ensure it's good before you save it. Press the *Reset* button to clear the audio and record again.

VIDEO NOTE

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



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

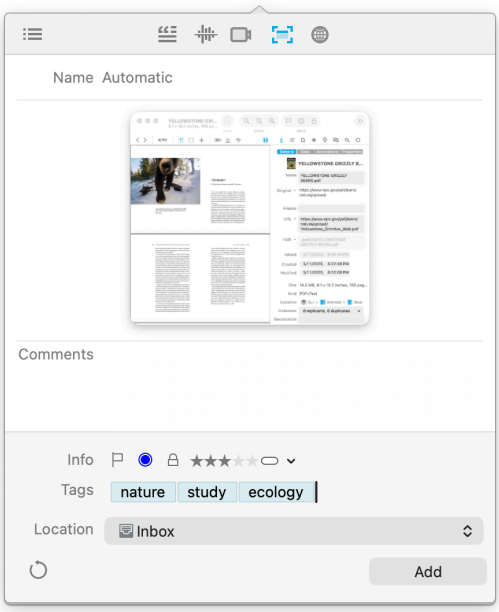
- **Begin/Stop Recording:** Press the red circular button to begin recording. Press the black square button to end recording.
- **Source:** Choose the video and audio source in the small downward facing caret next to the record button. Any attached compatible audio-visual devices should be available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

When you've stopped recording, you will be these view-specific options:

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

SCREEN CAPTURE

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



This view has one simple section with three options, also accessible via shortcuts:

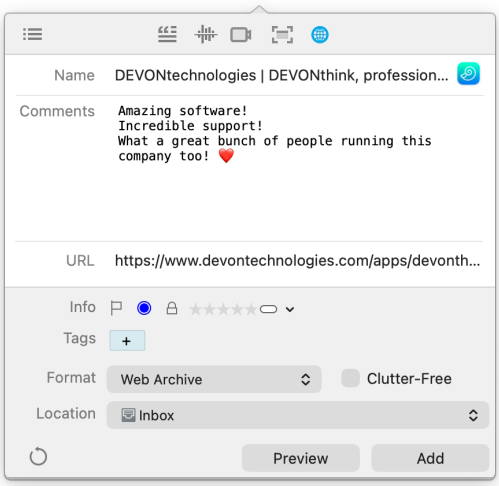
- **Screen:** Capture your entire screen (⌘1).
- **Window:** Capture a specific window (⌘2). Hover over a window and it will be highlighted in blue. Click once to capture it.
- **Selection:** Capture a specified area by dragging a bounding box around the desired area (⌘3). To reposition the area, hold the space bar. To stop the capture action, press the ⎋ Escape key.

After making the capture, these view-specific options are shown:

- **Name:** Enter a name for the screen capture. If no name is provided, a date and timestamped name will be automatically given.

WEB CLIP

Use the *Web* Clip view to quickly clip the current web page, a URL from your clipboard, or enter a URL manually. Each option is also accessible via shortcuts.



- **Default Browser:** Displaying the icon of your default browser, click this to capture the current page. This shows the same options as the Clip to DEVONthink browser extension. (⌘1)
- **Clipboard URL:** If you have copied a URL, click this option to detect and capture it (⌘2).
- **Manual:** Click this to manually enter a URL to capture (⌘3).

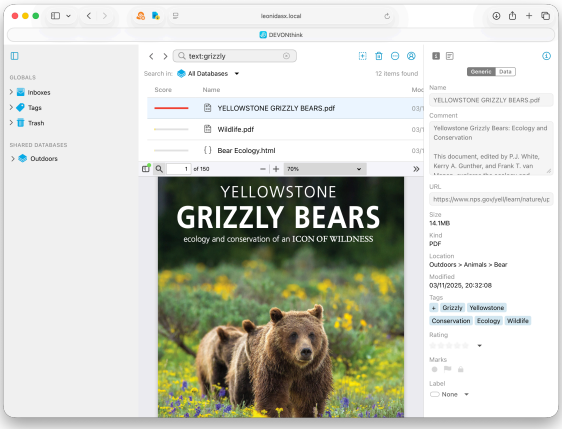
Before saving the clipping, you will see these view-specific options:

- **Name:** The name should be automatically populated from the title of the web page, but it can be changed manually, if needed.

When using the default browser option or the Clip to DEVONthink extension, click the *Preview* button and DEVONthink will attempt to display a preview of the intended capture. This can be helpful in trying to determine if a capture will be successful. And if you hold the ⌘ Command key, you will see the shortcut keys for the *Add* and *Preview* buttons.

WEB SHARING

DEVONthink comes with a built-in server for broadcasting your databases on a network. While the operation is covered in the In & Out > Web sharing chapter, here we cover the interface shown when accessing shared databases in a browser window.



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

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

SIDEBAR

A condensed version of the *Navigate* sidebar found in DEVONthink's main windows, this provides access to the contents of any shared databases. Some basic context menu items, e.g., *New Group*, *New Feed*, *Rename*, *Move to Trash*, and *Empty Trash* are available when Control-clicking in the sidebar. At the top is a button to show or hide the sidebar.

ITEM LIST

The item list behaves in many ways similar to DEVONthink, showing the groups and documents in the current location. All these items can be selected and reorganized by drag-and-drop, to groups in the sidebar ones in the item list. Switch locations by navigating the groups in the sidebar or double-clicking a group in the item list. At the top, the name of the current location is shown. Clicking on it opens a popup displaying the parentage of the current group, going back to the database itself. Click any parent in the dropdown to navigate directly to it. To navigate back and forth through locations you've visited, use the ‹ and › buttons in the path bar.

When dragging and dropping files into the websharing interface, drop them on top of existing documents in the group. If the group is empty, drag and drop to the group in the sidebar. Or click the ⊞ button at the top of the item list and choose *Upload Document*. Drag and drop a file onto the dialog or click *select* and choose one. Make any changes you need to and upload it directly to the current group. To delete an item, select it and press the 🗑 button.

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

- **New:** The submenu allows you to create new items: *plain text*, *formatted note*, *Markdown*, *Bookmark*, *RSS feed*, and *groups*.
- **Get Info:** Shows the *Inspector* pane for the selected file.
- **Mark:** Toggle the *Flagged*, *Unread*, or *Locked* state of a selected file.
- **Rating:** Adjust the rating for a selected file.
- **Label:** Apply or remove a color label to a selected item.
- **Upload Document:** Use this to upload a new document to the database.
- **Download Document:** Download the currently selected file.
- **Move to Trash:** Move the selected item to the database's Trash.

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

VIEW/EDIT PANE

When an item is selected in the item list, a preview of any compatible file will be shown here. The DEVONthink-native formats and some non-proprietary text-based formats can be displayed. You can even edit plain text and Markdown documents. Just click in the *view/edit* pane and begin editing.

Editing bar: The Editing bar above the view/edit pane shows for certain types of files. If the document can be edited in web sharing, available tools will be shown. The bar also allows you to move back and forth through previously viewed files via the ‹ and › buttons.

Of special note is the behavior of formatted notes, a web-based format. Tap the edit button on the right of the Editing bar to access some editing options, like adding bold or italic type. You can also select text and create a hyperlink with it. Lastly, you can choose an image to insert into the document.

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

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

INSPECTORS

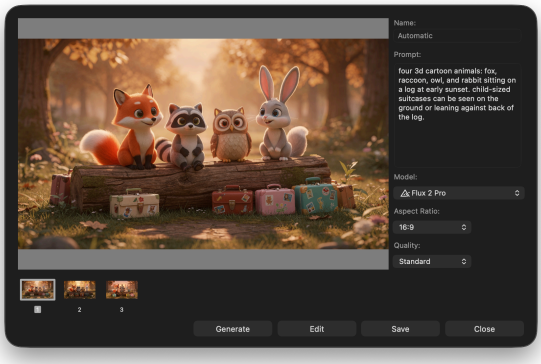
Info: There are three inspectors available in web sharing. Shown by clicking the ⓘ button, you will find a condensed version of the *Generic* and *Data* inspectors. If you have permissions to make changes to the current database, it is possible to change some of the metadata, like ratings or labels. You will also find a See Also inspector showing suggestions of potentially related documents. Clicking on an item in the results will display that document in the view/edit pane. The document selected in the item list is always listed at the top, so you can return to it easily.

TOOLBAR

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

- **Show/Hide Sidebar:** Toggles the visibility of the sidebar.
- **Search:** Search for files in the open databases by entering search terms. Search prefixes are supported so you can use, e.g., `kind:pdf name:manual`. When you do a search, a *Search in* scope dropdown will appear so you can choose to search the current location, current database, or all available databases.
- **Add:** The submenu allows you to create new items: *Plain Text Note*, *Formatted Note*, *Markdown*, *Bookmark*, *New Feed*, and *Group*. You can also add items via the *Upload Document* command.
- **Action:** Displayed as ⋯, this menu shows options similar to the context menu in the item list.
- **Move to Trash:** Put the selected item in the database's trash.
- **User:** Set the *Appearance* (Light, Dark, or Automatic), *Language* (English or German), or *Logout*.
- **Show/Hide Inspectors:** Toggle the Inspectors panes.

GENERATE IMAGE



Generate Image is a resizable panel where you can create AI generated images based on a description you provide. Enter your prompt, choose your AI model and settings, press *Generate*, and wait for your image. Images will be shown but also displayed in a slide strip of thumbnails under the main image. Click on each to view and compare them. If your AI model supports editing, e.g., the Flux models, you can select a thumbnail, enter changes for the image in the prompt field and press the *Edit* button. The image will be processed and changed per your instructions. And if you have an existing image you want to modify, copy it to the clipboard, open the Generate Image window, click the display area, and paste it in. Now enter your new instructions and edit the image.

The controls on this panel are simple to use.

- **Name:** Provide a name for the image. If none is entered, the prompt will be used as the name.
- **Prompt:** This is the description of the image you want created. Be as specific as you need to be.
- **Model:** This is the generative *AI model* you specified in the settings.

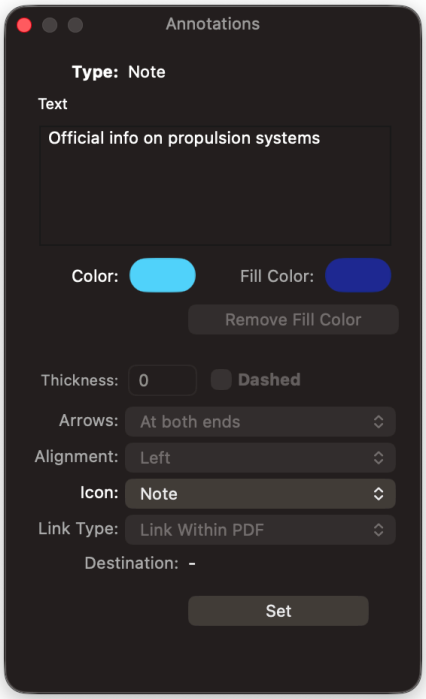
- **Aspect Ratio:** Choose from predetermined aspect ratios. Supported sizes are: `1:1`, `16:9 (9:16)`, and `4:3 (3:4)`. The size of the resulting image is controlled by this setting, the generative model, and optionally, the quality setting.
- **Quality:** Choose whether to create a *Standard* or *HD* image. Not supported by all models.

At the bottom of the panel are buttons to *Generate* (⌘G) a new image, *Edit* (⌘E) to edit the current image, *Save* (⌘S) the document, or *Close* and dismiss the image.

Take some time to craft your prompt to avoid to much back and forth interaction. The more specific you are, the more you can help steer things toward what you imagine.

> Note: This requires an API key for a text-to-image generative *AI model*.

ANNOTATIONS PANEL



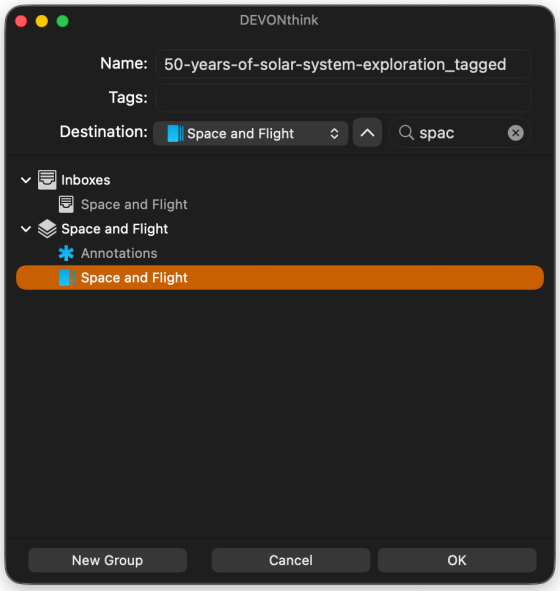
When annotating a PDF, a dark window will appear for non-highlighted annotations. Here you can edit certain properties of an annotation. Choose the *Tools > Mode > Annotation Selection* tool and double-click an annotation to reopen this panel.

- **Type:** Displays the specific type of annotation, e.g., *Rectangle*.
- **Text:** Shows the content of Text and Note annotations.
- **Color/Fill Color/Remove Fill Color:** Set the border and background color or remove the background.
- **Line Tools:** Set the thickness, dashes, or arrows on Line annotations.
- **Text Tools:** Set the *Alignment* for Text Annotations, e.g., *center*.
- **Icon:** Choose the icon for Note annotations

- **Link Type:** Set whether a Link annotation points to an external location, e.g., a web address, or a page in the same document.
- **Destination:** The URL or page number being linked to.

See the section on PDFs for more information on annotating PDFs.

GROUP SELECTOR



If you have set *Files > Import > Destination* to *Select group*, this panel will appear when importing items in certain ways, e.g., when dropping files onto DEVONthink's dock icon or importing via scripts with no specified destination.

- **Name:** Displays the name of the file being imported. Edit, as needed.
- **Tags:** Add optional tags.
- **Destination:** Choose where to import the document. This includes recently used destinations as well as any *favorited groups*.
- **Toggle Mini panel:** Expand or collapse displaying the databases list.
- **Search:** Do a case-insensitive search for the name of a specific group. This supports substring matches, so you can find groups much more quickly. For example, a search with the first letter(s) of words, `dt m` would match a group named `DEVONthink Manual`.
- **New Group:** Create a new group in the selected location in the databases list. When using the mini panel, this command is the first item in the *Destination* dropdown.

This panel remembers the last used location, so if you're repeatedly importing to the same location, you only need to tap the ↩ Return key to immediately import an item.

Read more about getting files into your database in the In & Out section.

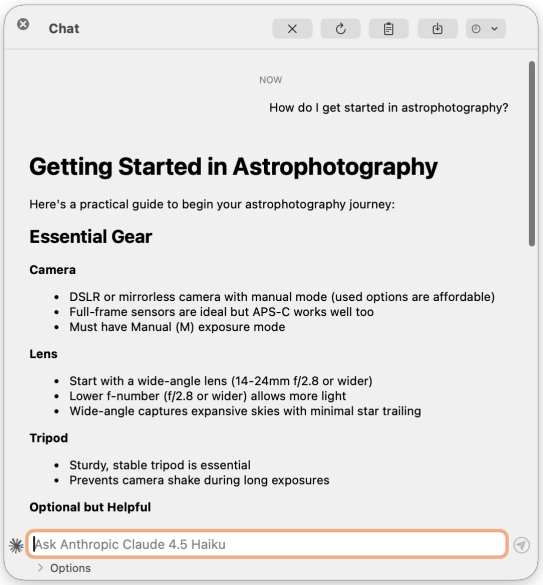
POPOVERS

Popovers are a specialized panel that appears on command and disappears after interacting with it. These are usually used for quickly viewing information about a selected item but can also be used in some other ways. For example, *Database Properties* is an information popover you may already be familiar with. Here we discuss a few more DEVONthink offers, starting with information popovers and followed by utility popovers.

One special feature of some of the popovers is the ability to float above other windows. When the popover is open, click and drag at the triangular point of connection to the window and tear it way. You can then move it around as an independent panel. This will be noted for the ones that support it.

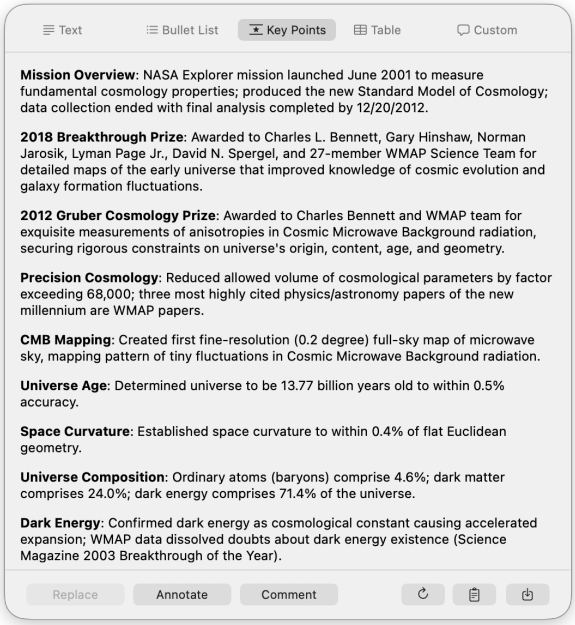
AI POPOVERS

There are three AI-based popovers in DEVONthink providing summarizing and transforming content or giving you access to chat with your AI engine. Another one transforms natural language queries into DEVONthink's search language.



Chat: This tear-off popover gives you quick access to interact with your chosen *AI* model. Opened with the button or *Tools > Chat*, this provides the same functionality as the *Chat* inspector. However, it functions independently from the inspector, remembering its own conversations. Ask impromptu questions or make inquiries about the selected document in the text field at the bottom of the pane. You can press the send button or press the ↩ Return key. The text field displays the default chat model but you can click the dropdown next to the it to choose an alternate available chat model. Enable *Speak chat responses* if you have a need to hear the chat replies.

At the top of the popover are three buttons, some having hotkeys for quicker use: *Clear* (⌘K), *Copy*, and *Save* (⌘S). So if you want to start a new chat, copy the current response, or save a transcript of the chat, you have those options.



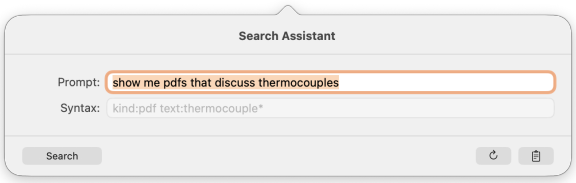
Summarize and Transform: This popover is used with a document displayed in the *view/edit* pane. This popover can be opened via the button in the *Navigation Bar* or the *Summarize Documents via Chat* command in the *Tools* or context menu. When opened, the current document's text will be processed according to the *Summaries* section of the *AI > Chat* settings, e.g., as *Bullet Points*. If you choose another option, the text will be processed again to match the chosen output.

Another option you may be surprised to find is you can summarize an image! If you are using a vision-capable *AI* engine, the image will be analyzed and a description will be shown in the popover. If you want to vary the amount of detail, you can modify the number of tokens in the *Usage* dropdown

in the settings. This obviously changes the token expenditure, up or down, based on your choice, but it may be used to fine-tune the summary.

If you instead press the button in the *Navigation Bar*, the document's text will be assessed and you'll see a recommendation for rewriting the text in a specific tone, e.g., *Friendly*. This often works well with selected text. And be aware that processing entire documents will increase the token expense.

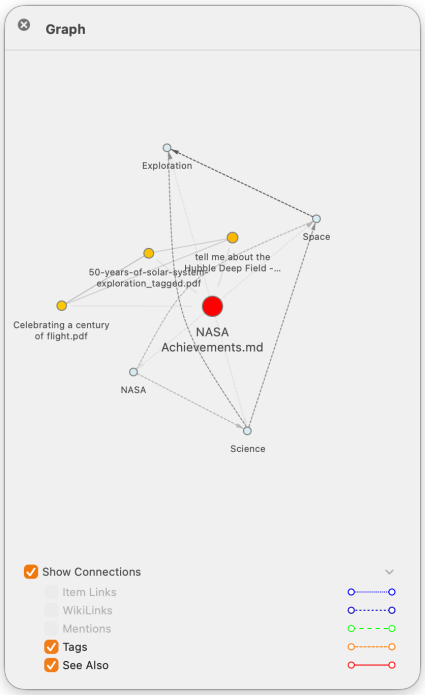
At the bottom of the popover are keys to *Replace* currently selected text in text-based documents, *Clear* (⌘K) the summary, *Save* (⌘S) the summary as a separate document, or *Retry* (⌘R) generating the summary.



Search Assistant: Finally, this detachable popover lets you enter a search query in natural language and AI will convert it to DEVONthink's search syntax. Put your cursor in the toolbar search field, press the ↩ Return key, then click the *AI* button in the search options to open the popover. Type in your query, like "What PDF files mention sync and have ticket in the name?" may yield `kind:pdf text:sync name:~ticket`.

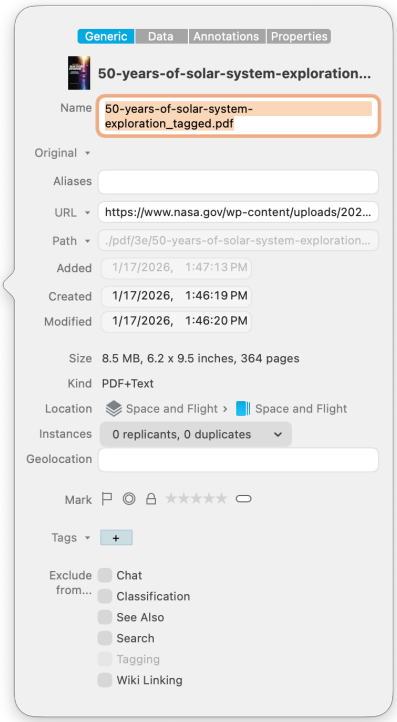
Click the button (⌘C) to put the suggested syntax on the clipboard. Press *Search* (⌘F) to run the search using the recommended search terms. If you want to generate a new suggestion, press the button (⌘R).

Be aware the syntax generated by AI may not be exactly optimal for your search. However, it often can be used as a useful starting point. Also note the default AI engine and model affects the suggested syntax. You set another model in the *AI > Chat* settings, e.g., Claude's Haiku versus Sonnet, to see how the results may differ.

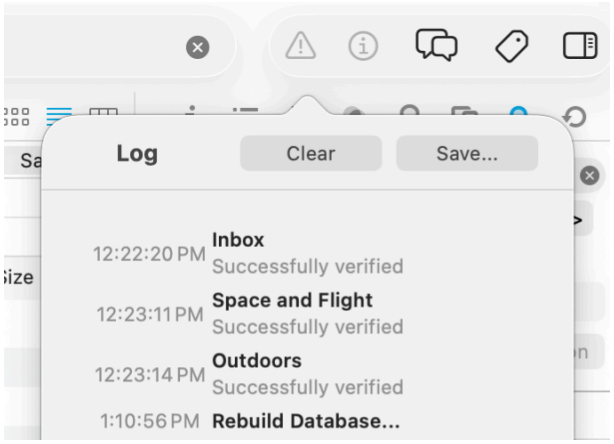


Graph: Utilizing DEVONthink's internal AI, the *Graph* inspector can also be opened as a tear-off, resizable popover for a more convenient view of the document's various connections to tags and other documents in your database. When detached, this size and position of this popover will be remembered across launches and when using workspaces.

INFORMATION POPOVERS



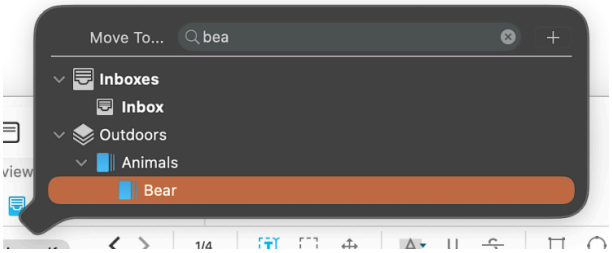
Info: This tear-off popover displays information about the currently selected item. However, it is also dynamic, updating the information as the selection changes. It displays the contents of the Generic, Data, Annotations & Reminders, and Properties inspectors. Open this popover via *Tools > Get Info*, ⇧⌘I, or pressing the ⓘ toolbar button.



Log: The tear-off popover is the minimized version of the Log window, providing a quick way to glance at application messages without having to open a separate window. Open this popover via the ⚠ toolbar button. Note this button will only be enabled if there are messages available to be viewed. You can clear the log or press the *Save* button to save the log, usually to send to our support team.

UTILITY POPOVERS

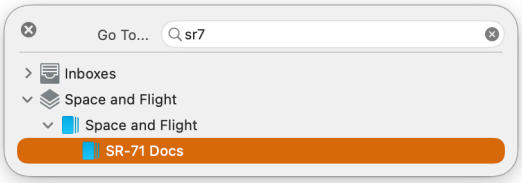
The utility popovers provide extra functions for moving files, navigating databases, or linking documents. Each popover has a search field at the top for helping to narrow the results. You can use an abbreviated search syntax matching the beginning of words to help speed the process. For example, if you are looking for a group named "Household Expenses" you could type `hou exp` to find matches. After searching, double-clicking a result will move the file to the selected location. For keyboard navigation, you can press ⇥ Tab to put the focus in the results list then navigate with the arrow keys. Pressing ↩ will accept the choice and close the popover automatically. There is also a plus (+) button for creating a new group in the current location when needed.



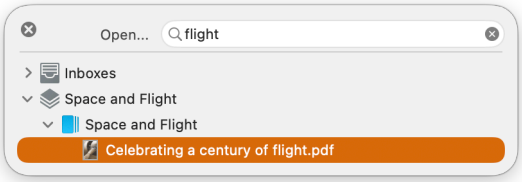
Move to: This popover allows you to organize selected files quickly. Open this popover via *Data > Move To* or pressing ^⌘M.

The default behavior of this popover is moving files. However, the behavior can be changed using command keys. Hold the ⌥

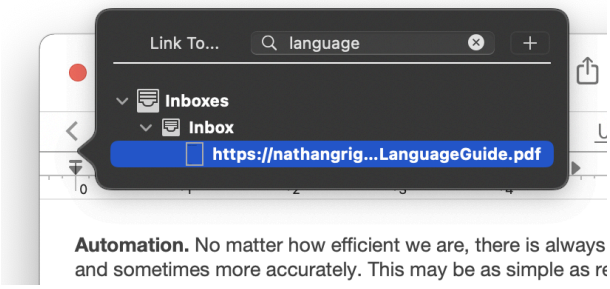
key to duplicate files to a selected location. Hold ⌘-⌥ to replicate the files to a selected location within the same database. Note the text in the popover will change to reflect the kind of operation will take place.



Go to Group: This popover allows you to quickly jump to another location. Open this popover via *Go > To Group* or ^⌘G. One special property of this popover is the ability to act as a floating pane. Open the popover then click and drag it away from the toolbar. It will remain open as a searchable floating pane you can use for quick navigation. You can also drag and drop files to it, similar to the Navigation view of the Sorter.

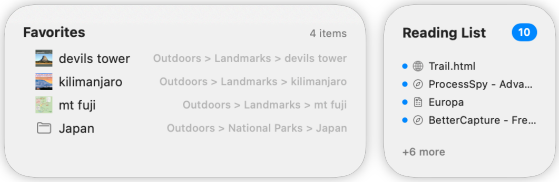


Go to Document: This popover allows you to quickly navigate to a specific file. Open this popover via *Go > To Document* or ^⌘O. Note this popover does not support abbreviated syntax, i.e., matching substrings or non-contiguous words, as the fuzzy matching would lead to far too many results. Given a filename of `DEVONthink sync timing tests.md`, `timing tests` would match; `DEVONthink timing` would not.



Insert Link: Used when editing text-based documents, e.g., rich text, this popover allows you to search for and quickly insert a link to that file in the current document. The type of link inserted will be appropriate to the current document type, e.g., a Markdown document will have a properly formatted Markdown link. Open this popover via *Edit > Insert > Item Link*, the *Insert > Item Link* context menu command, or ^⌘E in the context menu while editing a compatible document.

WIDGETS

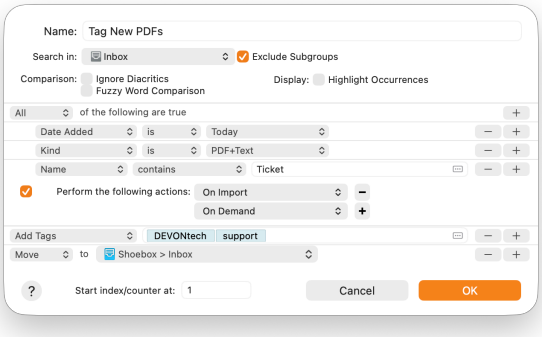


For those old enough to remember, OS X had a feature called the Dashboard where you could install widgets, the precursors to the widgets Apple introduced later on their mobile operating systems. With macOS Tahoe, Apple brought application-specific macOS widgets to the desktop and DEVONthink comes with a small contingent of them.

In the Finder, Control-click your desktop and choose *Edit Widgets*. Scroll to *DEVONthink* in the widget directory to view the available options including: the *Reading List*, *Favorites*, a tip from our blog, or view or load one of your *Workspaces*. Click the green plus button or drag and drop a widget to install and position it. For widgets you don't need to see all the time, you can add them to the Control Center and popup it open, as needed. Once installed, you can change a few of the options. Control-click the widget and change the size, from small to extra large. Choose *Edit…* to bring up the configuration options. For example, the *Reading List* widget lets you choose between viewing from all the entries or just the unread ones.

Not only do widgets let you see things, but also open them. Click on a favorited item to open it in DEVONthink. Or tap a workspace to quickly load that set of databases and windows.

PREDICATE EDITOR



The Predicate editor allows you to create a set of criteria for matching items. When you create or edit a smart group or smart rule, this window is where you set criteria to match and for smart rules, what actions to take with any matched files. And while displayed in a sheet instead of a separate window, the Advanced search supports creating predicates in a similar way.

SEARCH OPTIONS

When used with a smart item, the top section of the editor contains a mandatory name and search location, as well as a few optional items.

- **Name:** Enter a name for the smart item.
- **Search in:** Select the location you want this smart item to search.
- **Exclude Subgroups:** Enable this to ignore items in subgroups of the location selected in the *Search in* dropdown.
- **Ignore Diacritics:** Check this to treat letters with diacritics, e.g., umlauts or accented characters, the same as their regular counterparts.
- **Fuzzy Word Comparison:** Check this to apply fuzzy logic to contents-based criteria, ignoring simple typos so that instances of "hello" and "hallo" are both found.
- **Highlight Occurrences:** When used with contents-based matching, this will highlight the terms in the text of selected search results, if possible.

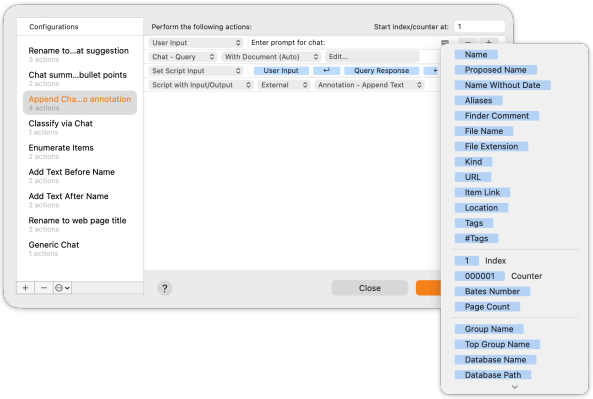
PREDICATES

The other section of the editor shows the search predicates . The predicates are built as a series of logical steps. At the top, define whether *All* (Boolean AND) or *Any* (Boolean OR) of the contained predicates need to be true for an item to be matched. If you need to create a more complex match, hold the ⌥ Option key and click a … button to

create a "compound predicate" also called "branch". Each branch also has its own *All* or *Any* option as well. This allows you to create very targeted searches.

Criteria may be content- or attribute-related. These contain the attributes you want to match. For example, searching for a specific word in PDF documents added this week would require three criteria: `Content`, `Kind`, and `Date Added`. Each criterion is made up of three parts: the attribute to be evaluated, e.g., `Content` or `Date Modified`, an operator like `begins with`, and the value to be matched. When using text-based criteria, a placeholder will indicate if booleans and wildcards are supported. Use the + and - buttons to add more criteria to your smart group or to delete them. Add as many criteria as you need noting it's better to as specific as possible to avoid false positives. Criteria can be rearranged with drag-and-drop, if needed.

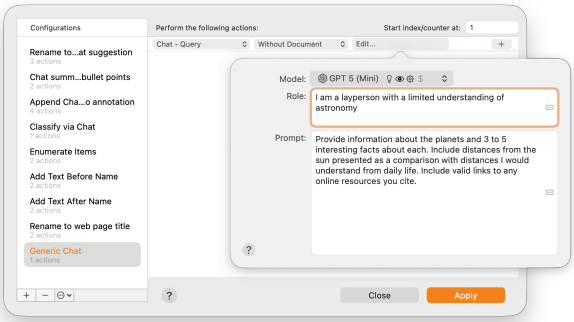
> **Example:** To find all Microsoft Excel files use the condition *Extension ... is ... xslx*. To find items created in the last 7 days use the condition *Date created ... is ... Last Week*.



Placeholders are a powerful option in predicates, whether it's in a search, smart rule, or batch configuration. A placeholder can be used to get a document's item link, the year and month of the current date, or even the response from a Chat prompt. When the search, rule, or batch configuration runs, the placeholder is replaced dynamically. You can access placeholders in the context menu but at the right end of text fields for certain criteria in the predicate editor, you may see an ellipsis in a rectangle. This is the placeholder popup where you can browser and quickly choose the attributes you need.

> Note: Full regular expressions are not supported in criteria.

BATCH PROCESSING



If you need to make impromptu changes to documents in your database, DEVONthink's batch processing comes in handy. Opened via the *Tools > Batch Processing* command, you can build a collection of automations for a variety of use cases.

CONFIGURATIONS

The *Configurations* section is where you create or edit your batch processes. Select a configuration and press *Apply* to run it on selected items or edit and press *Close* to continue editing or run it for later. The configurations are all independent of each other, so you can reorder them via drag

and drop. Press the + button to add a new configuration or the – button to remove a selected one. For other configuration options, click ⚙.

- **New:** Create a new batch processing configuration.
- **Duplicate:** Copies the selected configuration.
- **Remove:** Delete selected configuration(s).
- **Rename:** Rename the selected configuration.
- **Import:** Import batch processing configurations, `.dtBatchProcess` files.
- **Export:** Export the selected configuration(s) for sharing, backup, or archiving.

These commands are also available in the context menu of the configurations.

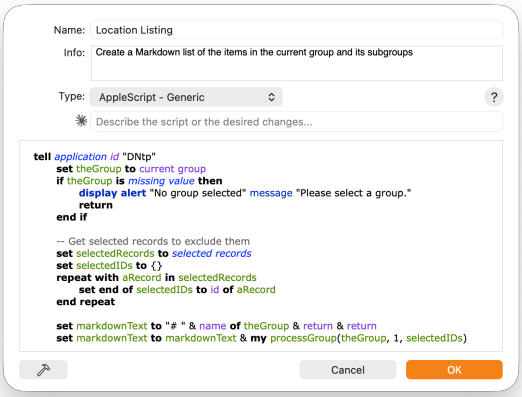
ACTIONS EDITOR

On the right side of the window is where you construct the actual batch process, adding actions to affect the changes you want to make. When you create a new batch process, one action is added by default. Click the dropdown to choose the appropriate action and fill out any required information. Press the + button to add more actions. Press the – button to remove an action.

At the top of the actions section, there is a numeric field, *Start index/counter at*. That is used with the `Counter` and `Index` placeholders. This is not a global value, but is specific to the selected batch process. This can be very useful if you are using a separate numbering scheme for different projects. Just create a configuration for each project and assign its own starting number.

Read more about the available smart actions that work with batch processing in the Smart Rule Events and Actions section as well as the available placeholders.

SCRIPT EDITOR AND ASSISTANT



For those interested in scripting, a specialized scripting interface is now included in DEVONthink. With it you can draft a variety of scripts in both AppleScript and JavaScript (JXA). Covering the types of scripts used in-application, you can start creating scripts and open them in an external editor, as needed.

The Script Editor window can be opened via *Data > New > Script* as well as the context menu of the item list and the Action menu. The window is composed quite simply. You have a mandatory *Name* field. Following that is an optional *Info* field where you can include a description or instructions, appearing as comments in the script. Next is the *Type* dropdown where you choose one of the types of scripts found in DEVONthink. The supported types are:

- **Generic:** This is a generic script containing the boilerplate code for handling a

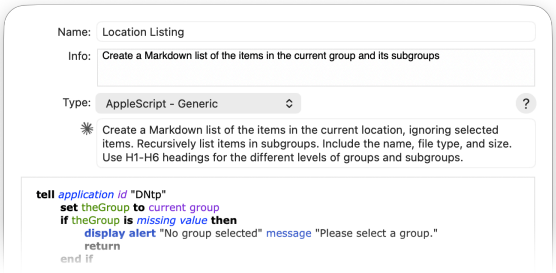
selection of items. It can be used for many purposes.

- **Reminder:** This creates a draft reminder alarm script in the *Annotations & Reminders* inspector. The appropriate handler is already included.
- **Smart Rule:** Used with the `Apply Script` smart action in smart rules and batch processing, this contains the appropriate handler and code to be used in smart actions.
- **Output:** Used in the `Script with Input/Output` smart action, the template code contains the handler ready to modify and use.

Finally, at the bottom of the window, is the editing pane where you can work on the code. As you work, you can press the *Compile* button, shown with a small hammer. This lets you check if your code has any syntax issues. And finally, the *OK* button will generate a script file with the code for you to open in an external editor, etc. Script files are saved as text-based `.applescript` files that can be edited in DEVONthink or opened externally, e.g., in Script Editor.

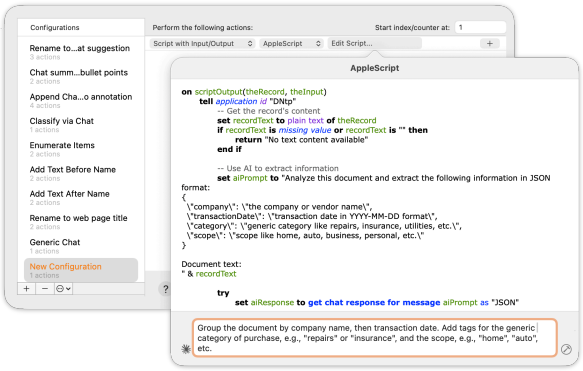
You can read more about the various types of scripts in the Automation chapter.

SCRIPT ASSISTANT



If you have set up access to external AI in the Pro and Server editions of DEVONthink, you may be able to use it to write or modify the code. Below are the places you can find the Script Assistant. Bear in mind, the code is a draft and the script may not work correctly in its initial form. However, the AI is aware of several common scripting errors and will attempt to correct them in its output. You can ask it to refine the code.

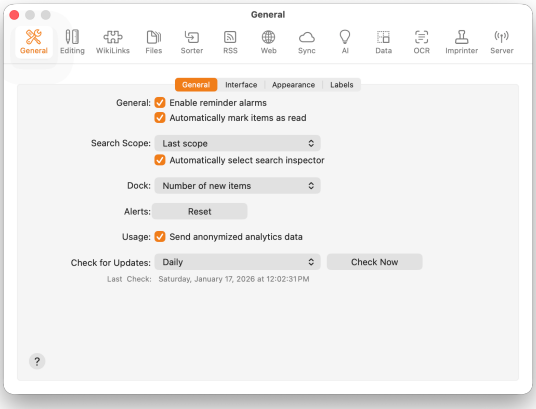
Script Editor: Below the Type dropdown in the Script Editor window is a field where you can enter a prompt to be used for a script. Click the icon to the left of the field and choose an available AI model that supports coding. After you write your prompt, press the ↩ Return key and AI will try and draft a script fulfilling the requirements you've set.



Smart Actions: Another place you can access external AI is when editing a smart item script in a smart action, i.e., `Apply Script` and `Script With Input/Output`. In a smart rule or batch processing configuration, edit the internal AppleScript or JavaScript. You will see the AI model button to the left of the Script Assistant field where you enter your AI prompt to compose or improve the script.

Reminders: When setting an reminder alarm on an item, you can add a reminder alarm script. For the alarm, choose `Execute AppleScript` or `Execute JavaScript`. Click the button to the right to open the script editor. Here you can directly compose a reminder script or again, use external AI to describe the script. Enter the prompt, press ↩ Return key, and let AI generate draft code for you.

SETTINGS



The *Settings* window, opened via *DEVONthink > Settings*, is where you can access a broad range of settings for customizing DEVONthink to your personal needs.

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

DATABASE PROPERTIES

The *Database Properties* popup provides information and some controls for a specific database. Select a database and open the properties popup using *File > Database Properties*. Here are the parts and controls you'll see.



General: This section provide per-database controls for Spotlight integration, versioning, and tagging.

- **Location:** Shows the location of the database in the filesystem. As the cursor moves over the path it exposes any hidden folder names. Double-click any part of the file path to reveal it in the Finder.
- **Encrypted:** This is enabled when using an encrypted or revision-proof database.
- **Revision-proof:** Enabled when the database is revision-proof.
- **Create Spotlight Index:** Check this option to write Spotlight metadata for this database. This allows you to use Spotlight in the Finder to search for documents in DEVONthink. If you are having issues finding documents in a Spotlight search, click the *Rebuild* button to recreate the metadata.
- **Exclude Groups from Tagging:** Disable this option to use group tags in the database. This is enabled by default.
- **Inherit Tags of Groups:** Enable this to apply a group's tags to its child items.
- **Case Insensitive Tagging:** Check this option to disallow tags with different capitalization.

Options:

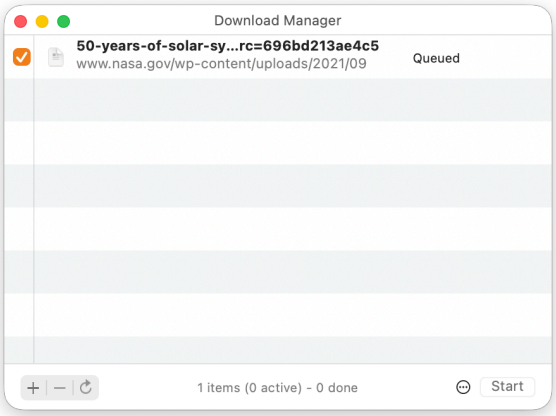
- **Name:** Edit the database's name. Be aware, changing the name here will also change the name of the database file in the Finder.
- **Comments:** Add comments about this database. These comments are only used in DEVONthink, i.e., not exported to the Finder.
- **Protection:** Click the padlock to add or change the *User* and *Password* on a database.

> Note: The user credentials on a database are not encrypting it nor is it locking the database from being opened. It is used when trying to import a database when syncing. Anyone trying to import the database from a sync location will need to provide these credentials. For a locally secured database, create an encrypted database via *File > New Encrypted Database*.

Statistics: This section displays some statistics about the contents of the database, e.g., counts of some different file types, total size of the contents, and number of words in the index of the database. Additionally, it reports the number of indexed or replicant items. And for an encrypted or revision-proof database, the space used and available is listed.

DOWNLOAD MANAGER

DEVONthink's *Download Manager* panel is a tool for downloading files or complete web sites. Offline archives can make a local copy of a site to use when your you're not connected to the Internet. This panel also supports URLs for local files, including POSIX paths, a `file://localhost/` URL, or a `file:///` URL. You even have the option to either store the information in your database or in a Finder folder.



PANEL ELEMENTS

Opened via *Window > Download Manager* opens, the *Download Manager* panel consists of:

- A list of a items to be downloaded
- A status bar at the bottom
- A + button for adding items to and a − button for deleting selected items from the list
- A ↻ reload button
- A Start/Stop button to enable or disable downloads.
- An ⚙ *Action* menu where you can set the download location and access options.

ADDING FILES

There are a few different methods for adding files to the *Download Manager*, one of which likely fits your use case:

- Drag and drop a URL from anywhere, e.g., from Safari's address bar.
- If you have copied URLs, from bookmarks, links in DEVONagent Pro, etc., you can paste them into the panel.
- Click the + in the panel and add the URL manually. Optionally, You can enter the *Referrer*, *Username*, and *Password*, if known and required. And if the *Automatic* option is enabled, DEVONthink automatically creates a referrer when downloading whole web sites.
- When browsing web content or viewing files with web links in DEVONthink, you can add URLs via the context menu.

ACTION MENU

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

- **Add:** Manually add a URL to the list.
- **Edit:** Edit the parameters of a selected URL in the list.
- **Retry:** Attempts to reload an item that failed to download.
- **Remove:** Removes the selected items from the list. Alternatively, you can press the ⌫ Backspace or ⌦ Delete key.
- **Enable/Disable:** Checks or unchecks the selected items. Only checked items will be downloaded.

- **Start/Stop Queue:** Starts or stops the download queue. Same as the *play/pause* buttons at the bottom of the panel. Note this will only pause queued items. Any in progress downloads will continue.
- **Purge Queue:** Manually removes all downloaded items from the list.
- **Only Added Files to Thumbnail Gallery:** Offers various predefined option sets (see below).
- **Download to:** Choose where the downloaded files are stored, either in a *Downloads* group in a chosen database or a Finder folder set in the panel's Options.
- **Options:** Opens the options dialog sheet, which allows you to specify in detail what to download, which links to follow, and where to store the downloaded files (see below).

Pre-defined Settings: For your convenience, DEVONthink comes with predefined option sets that you can directly select from the action menu.

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

OPTIONS

The options dialog defines which file types are downloaded, which links it follows, where it stores the files, etc.

- **Files:** Check all file types you want the *Download Manager* to download (plain texts, rich texts, Office documents and PDF files, style sheets and scripts, images, embedded images, multimedia files, mark-up language files, etc.) Use the *Follow Links* pop-up menu to define how far DEVONthink should follow links on the downloaded HTML pages (see below). Check *Overwrite existing* to update an existing archive.
- **Overwrite existing files:** Use this to update an already downloaded page.
- **Folder:** When you choose *Download to > Folder*, DEVONthink stores all downloaded items in the Finder folder you choose here.

Click *Set* then browse to and choose your preferred location in the Finder. Double-click any part of the location to reveal it in the Finder.

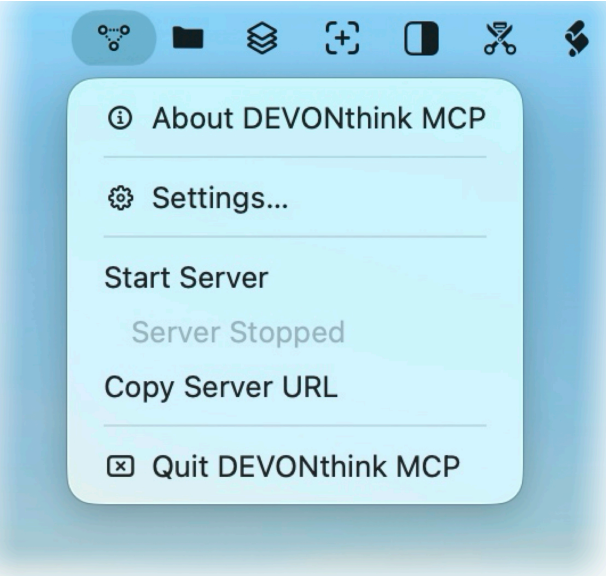
- **Download:** Define how many connections the *Download Manager* opens at the same time. We recommend leaving this at `4` unless you have a specific need to change it.
- **Automatically purge queue:** Removes successfully downloaded items during the process.

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

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

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

MCP MENU EXTRA



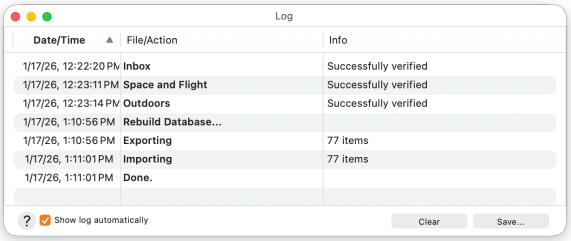
If you have enabled *Launch at login* in the *AI > MCP* settings, an icon appears in the menu bar at the top of the screen. Click on it to access information and controls for DEVONthinks' MCP server.

- **About DEVONthink MCP:** — the standard About panel.
- **Settings...:** Opens the *AI > MCP* settings.
- **Stop/Start Server:** Pauses and resumes the server without quitting it.
- **Server Running:** Shows the status of the server and the port while running.
- **48 Tools Available:** Lists the number of available MCP commands.
- **Copy Server URL:** Copies to the clipboard the URL to be used when setting up access to the server.
- **Quit DEVONthink MCP:** Stops the server and its processes.

You can read more about the MCP server in the Getting Started > AI in Practice and Appendix > MCP Server sections of this document.

LOG

The *Log* panel is an informational window. It displays a variety of messages, including things like the number of emails imported, warnings about database health, or errors from script actions in smart rules. The panel shows the date of the message, any affected files, and a little information about what happened. If you feel you are having sync issues, this panel is the first place to look. When doing any database or sync location maintenance, this is where the results are shown. You can also use this panel for your own purposes with the `log message` AppleScript command.

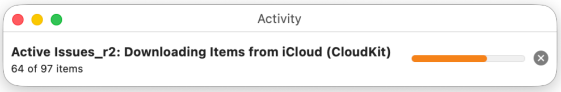


You can save the list to a text file with the *Save* button, and clear the log with the *Clear* button. To sort the log, click a column title to sort on that column, changing from ascending to descending each time you click it. If you Control-click individual log entries you will be shown options to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

The Log window will appear with any messages it has to show. If this becomes distracting to you, uncheck *Show log automatically*. You can always open the panel at any time using *Window > Log*. However, for important notifications, the log is always shown automatically, regardless of this setting.

ACTIVITY

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

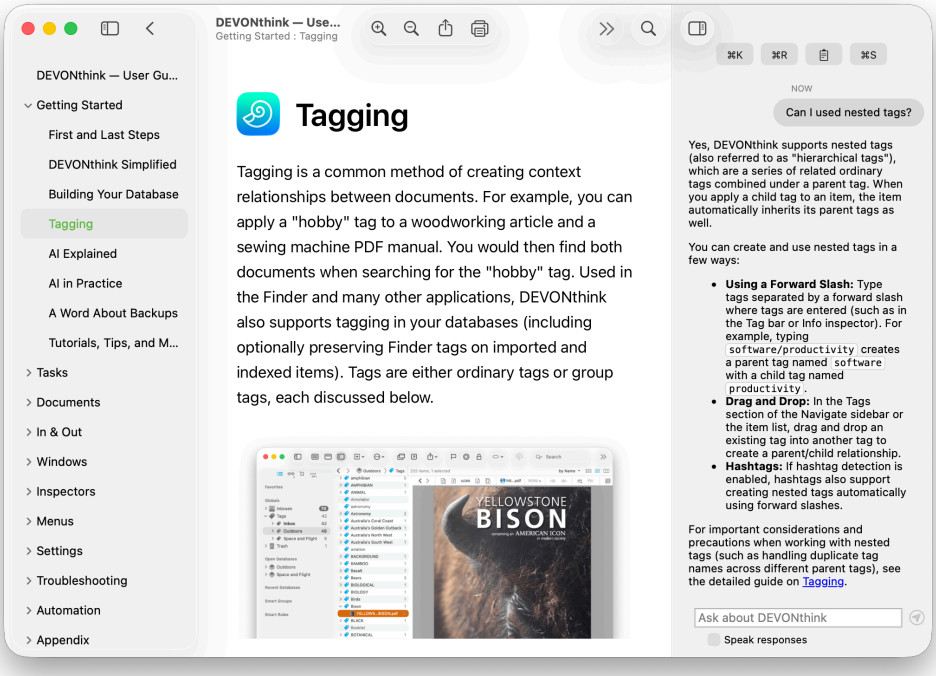


There is also an *Activity* pane at the bottom of the *Navigate* sidebar. Providing a less intrusive experience, this pane will appear and disappear quietly on its own.

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

HELP

DEVONthink's extensive documentation is available in its own window.



Opened via *Help > DEVONthink Help*, you can easily navigate through an alphabetical listing of its chapters and sections. You can also click the chapter headers in the sidebar, e.g., *Getting Started*, to read the introductory text and the section links for that chapter. Note the previous/next links in the section footers link to the defined structure of the documentation, not the alphabetical list shown in the sidebar. And for your convenience, the Help viewer remembers the last page you were viewing.

As you're reading and clicking links to jump to other parts of the help, you can navigate backward and forward through visited sections with left and right swipes. Zoom in and out with a double-finger tap or pinch-to-zoom. If you select text on a page, many services are available, including several of our own.

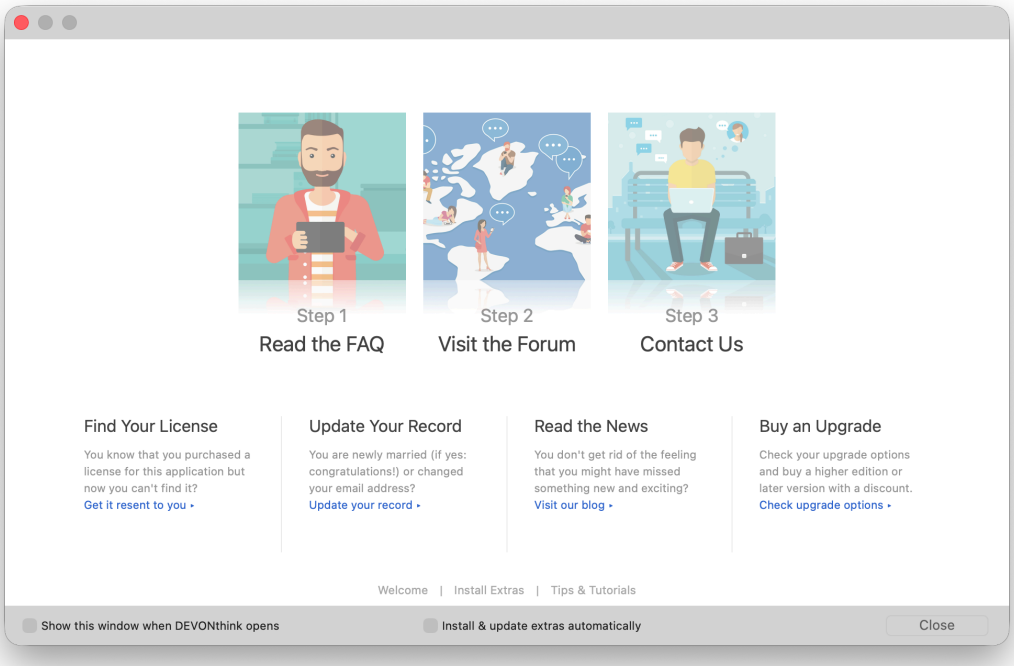
The toolbar of the Help window dynamically displays the current chapter and section. On the right, you have < and > buttons to navigate to and from pages you've visited. The toolbar also includes macOS *Share* and *Print* buttons so you can share or print the section you're currently viewing. You'll also notice a toolbar search field. Supporting wildcards and operators, do simple or complex searches of the help, e.g., `index* NEAR sync`. The sidebar will display a list of matching pages with a relevance indicator for each result.

Help Assistant: Of special note is the *AI* inspector on the right. Toggled via the button at the upper right, you can ask natural questions about the documentation. You can even ask for responses in another language. This feature uses your default *AI engine* to answer questions about the documentation. It can use commercial LLMs, e.g., ChatGPT and also OpenRouter, using GPT 4.1 Mini when

chosen. To minimize costs, the cheapest but still useful model from your provider is automatically chosen. For your convenience, the chat responses typically list links to the appropriate pages in the documentation so you can jump right to the desired pages. And if are in need of auditory responses, you can enable *Speak chat responses*.

SUPPORT ASSISTANT

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



WELCOME

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

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

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

FIRST LAUNCH ASSISTANT

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

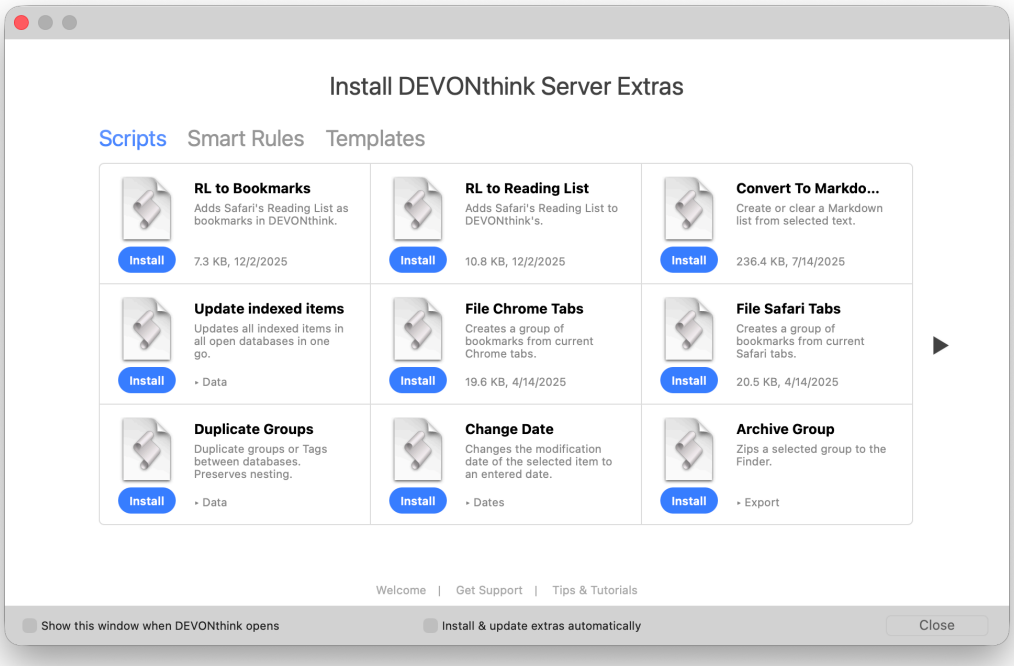
GET SUPPORT

The *Support* screen guides you through the three common steps for troubleshooting DEVONthink. In addition, you can update your details in DEVONtechnologies' customer database, or buy an upgrade or a second license.

INSTALL EXTRAS

On the *Extras* screen, DEVONthink lists all available extras that you can download and install from DEVONtechnologies' server. This includes scripts, *smart rules*, and *templates*.

Browse the list of extras and install them with the *Install* button. The last line of the description shows where in the *Scripts* or *Data > New from Template* menu the extra will show up after installation. Remove installed extras with the *Remove* button.



The extras are updated live from DEVONtechnologies' server so it's a good idea to check back from time to time. The latest extra is also always mentioned on the welcome screen. If you check the *Install & update extras automatically* checkbox at the bottom of the window, any updates to scripts or templates you've downloaded here will be updated as needed.

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

TIPS AND TUTORIALS

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

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

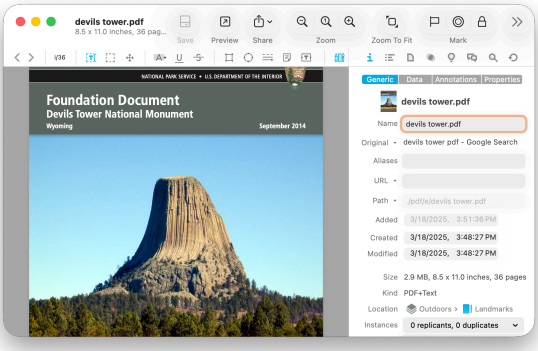
INSPECTORS

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

INFO PANE



The *Info* pane, just like its counterpart in the Finder, displays additional information about a selected document or group, from icon and name to comments and other metadata. Open the *Info* pane by selecting *Tools > Inspector > Info > …*.

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

GENERIC

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

- **Icon and Name:** Displays the name of the selected item. To change the icon of the item, select it and paste any image you want over it. To change the name of the item, use the *Name* field below.
- **Name:** Displays the name of the selected item. This is an editable attribute.
- **Original:** Displays the name of a document as it was originally imported or created. This cannot be changed. A popup menu has *Copy* and *Rename* commands, the latter resetting the current name back to the original name.
- **Aliases:** Displays any aliases for the selected item. Enter one or more words

here, separated by semicolons, as alternative targets for Wiki links. Generally, Wiki links refer to the name of contents, and aliases make this system even more flexible.

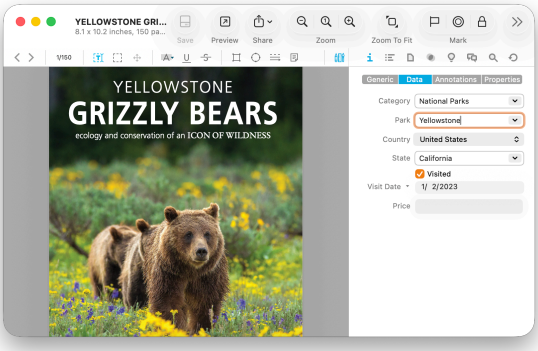
- **URL:** Displays a URL associated with the selected item. This is an editable attribute. While it is typically used for web addresses, it also may contain other types; e.g., file URLs, URL with custom schemes, etc. Click the down arrow and choose: *Launch* to open the URL, *Copy* to copy the URL to the clipboard, or *Remove* to clear the URL.
- **Path:** Displays the item's file's path in the Finder. This is not an editable attribute. Click the down arrow and choose: *Launch* to open the file in the system default application; *Show in Finder* to open a Finder window with the file selected, and *Copy* to copy the file path to the clipboard. If you are indexing files, there is a *Path* option that allows you to select a folder or volume. If you have moved indexed files to a new location, this option can be used to select the new location, provided you have not renamed any of the files before updating the path.
- **Attached Script:** Displays the name of a triggered script that runs when you select the item in the database. Click the down arrow and choose: *Select* to choose a triggered script to attach, or *Remove* to remove the script from the item.
- **Added:** Displays the date an item was added to the database. This is not an editable attribute.
- **Created/Modified:** Displays the date an item was created or modified. These are editable attributes. Click the calendar icon to choose a date and time. You can also select individual parts of the date or time and type or modify them with the up and down arrows. When typing, press the ⇥Tab key to commit the change.
- **Size:** Displays the size of the item. For groups and news feeds, this field shows the size of all contained items.
- **Kind:** Displays the kind of the selected item. For documents, the file type will be shown, e.g., Markdown.
- **Location:** Displays the location of the item in the database. This is an active item; hovering over items will display their full names and clicking them will navigate to the clicked group.
- **Instances:** Displays how many duplicates or replicants of the selected item are in the database. Click to show a pop-up menu listing all instances and duplicates and their enclosing groups. Select any item to reveal it.
- **Format:** For news feeds you can set the default format in which new articles are saved.
- **Color:** Set a color for a selected tag or group. Click the title *Color* for options to clear, copy, or paste an item's color.
- **Geolocation:** Displays geolocation data based on the creation origin of the file; i.e., the geographic location when the file was originally created. This is an editable attribute and can be changed if you'd like the location to be relative to something else, e.g., the site of a historic event.
- **Marks:** Displays these attributes for the selected item: *Flagged*, *Read*, *Locked*, *Rating*, and *Label*.
- **Tags:** Displays the tags applied to the current item. Click the + button to add a new tag. Tags will be suggested from the

existing tags in the current database or from all database tags if the document is in the Global Inbox. Click an added tag to reveal the Tag group, or remove it from the selected item.

Exclude From...: These checkboxes allow you to exclude an item from being used in various ways. For example, you can exclude temporary groups from classification to increase the accuracy of the built-in artificial intelligence. You can exclude an item from these operations:

- **Chat:** When enabled on any item, it will no longer be accessible via any external AI function, including database searches, batch processing and smart rules, summarizing documents via chat, etc.
- **Classification:** When enabled on a group, this will keep DEVONthink from suggesting or using the group as a possible filing location.
- **See Also:** When enabled on any file, DEVONthink will not include it as an item potentially related to the current file.
- **Search:** When enabled on any item, it will no longer appear in toolbar search results, smart groups, or smart rules.
- **Tagging:** Used with group tags and Tag groups, this inhibits the Tag from being applied to any item.
- **Wiki Linking:** When enabled on any item, it will not be detected by automatic WikiLinking.

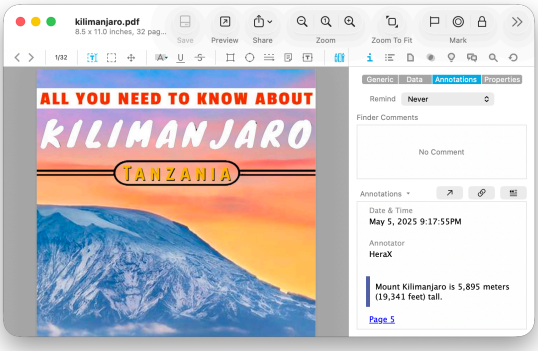
DATA



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

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

ANNOTATIONS & REMINDERS



This pane contains *Reminders*, *Finder Comments* and *Annotations*. It can be shown via *Tools > Inspectors > Annotations & Reminders*.

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

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

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

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

- **Bounce Dock Icon:** Bounce the icon in the dock. This will only occur if DEVONthink is not the active application.
- **Display Notification:** Displays a notification using the Notification Center, appearing at the upper right of your screen. The message shown can be a combination of static text and placeholder text. It defaults to the *Name* placeholder. Control-click and choose *Insert Placeholder* to add

additional placeholders. Note *System Settings > Notifications > DEVONthink* must be enabled for this alarm to display. Notifications are also only shown when DEVONthink is not the frontmost application.

- **Display Alert:** Displays an alert dialog when DEVONthink is or becomes the active application. If it's not frontmost, the dock icon will bounce until you switch to it. Like *Display Notification*, this contains static and placeholder text, and defaults to *Name*.
- **Speak Text:** Using the Mac's speech synthesis, this alarm will speak the specified static and placeholder text.
- **Play Sound:** Choose one of the system alert sounds found in *System Settings > Sound > Sound Effects*.
- **Send Mail With Item Link/Attachment:** Enter email addresses to which to send the matching items. This can be a comma-delimited list of addresses, names, or enter the name of a group you've defined in your contacts. The email contents will contain either an item link to the selected file or it will attach the file itself.
- **Add to Reading List:** Add the file to DEVONthink's Reading List.
- **Open:** Open the document in an a DEVONthink document window.
- **Open Externally:** Open the document in the system default application.
- **Launch URL:** Opens the URL associated with the document, if present.
- **Execute External Script:** Run a selected script. External scripts are stored in `~/Library/Application Scripts/com.devon-technologies.think/Reminders`. Add your own scripts to this location to make them available for use with reminders.
- **Execute AppleScript/JavaScript:** Run an ad-hoc script written for the current reminder. Press the … button to display a popup pre-populated with a core script in the chosen language. Edit this and press the compile button at the lower left. Embedded scripts are only available to the reminder in which they are created. If you want to use the same script with other reminders, consider using an external script instead.

As a bonus, reminder alarms will open databases containing the item when an alarm triggers.

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

If you are interested in the use of scripts in alarms, you can read more about them in the Reminder Scripts chapter of the Automation chapter.

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

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

Annotation Files: This pane displays or allows you to create annotation files for a selected document. Annotation files are separate files where you can store notes about a specific

document. These files can link back to the original file for quick access. Commonly used with PDF files, they can actually be used for making notes with any document in your database.

Above the annotation pane are a set of three buttons: ↗ to open the annotation file, 🔗 to insert a back-link to the current document, and 🔗 to insert selected text as a quote.

If an annotation file doesn't exist, you can make one with the commands from the down arrow in this section.

- **New from Template:** Opens a submenu containing three options: Create an Annotation file from the default template, choose a custom template added to DEVONthink's internal Annotations folder, or open the Annotations folder to access any custom templates you've added.
- **New from Clipboard:** Choose this option to create an annotation with content from the clipboard.
- **Open:** Open the annotation file.
- **Reveal:** Reveal the annotation file in its current location.
- **Insert Back Link:** This inserts a back link to the original file into a new annotation file. If no annotation file exists, one will be created with this command.
- **Insert Still Image:** Inserts a thumbnail from the currently viewed video associated with this annotation file. Playback must be paused to use this command. If you are using Markdown annotation files, we recommend you have enabled *Import images to group* in the *Files > Markdown* settings to store the thumbnail as a linked file.
- **Insert Quote:** This inserts both the selected text and a backlink to the page or paragraph in the original file. If no annotation file exists, one will be created with this command. This option is only supported by PDF, plain text, and rich text documents.

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

- **Insert Back Link:** Insert a link back to the original document in the current annotation file. With audio and video files, the back link will include the current playback time. With multi-page PDFs, the back link will include the current page. There is also a *Insert Back Link* button above the editing pane.
- **Insert Quote:** Inserts selected text an a link to the current page. This command also has an *Insert Quote* button above the editing pane.
- **Insert Summarized Annotations:** Inserts a summary of the document's annotations, similar to what is produced via the *Tools > Summarize Annotations* commands. The format of the summary is dependent on the format of the annotation file.
- **Export:** Exports the current annotation file to the Finder in one of these formats: PDF, rich text, plain text, or Word (.doc) formats.
- **Remove:** Moves the annotation file to the database's *Trash* and removes the reference from the original document.

- **Insert Summary via Chat:** Summarizes the current document or its selected text and allows you to insert the summary directly into the annotation file.
- **Insert Transcription:** Inserts recognized text from an image or speech from a media file. This is used when the text has been transcribed to *searchable text*.

Settings: There are a few annotation-specific options in the *Files > General* settings. Set whether annotation files are created in an shared *Annotations* group at the root of the database or in the same group as the referring document. Enable *Move annotations automatically* to have an annotation file "follow" the document it refers to if it moves to another database. And with *Rename annotations automatically* and *Update name of items links* in the *WikiLinks* settings, renaming the referring document instantly changes the annotation file's name and the backlink text.

Creating an Annotation File: DEVONthink has a built-in default annotation file in rich text format, suitable for general use. However, you can create your own custom template in plain text, rich text, or Markdown formats. These files can be created externally and added to `~/Library/Application Support/DEVONthink/Annotations.noindex` or created in DEVONthink and exported via *File > Export > as Template* to the `Annotations.noindex` folder.

To create backlinks to the original file, there are two placeholders for use in the body of your template:

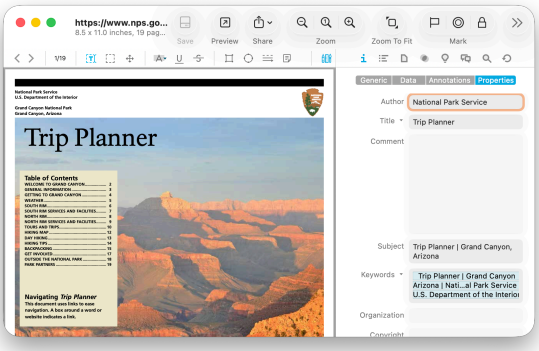
- **%documentName%:** Resolves to the name of the original document.
- **%documentLink%:** Resolves to the item link of the original document.

Rich Text: To create the backlink in a rich text template, use the `%documentLink%` placeholder and the document name will be added as the link's text.

Markdown: To create the backlink in a Markdown template, use the form: `[%documentName%](%documentLink%)`.

Plain Text: Since plain text files don't support live links, you can use *WikiLinks* to create a backlink. For example, if you are using the *Square Brackets* WikiLink syntax, you could use `[[%documentName%]]` in the body of the plain text.

PROPERTIES



The *Document Properties* section gives you access to certain format-specific metadata. Supported formats are: RTF, PDF, audio or video with metadata, or images. This metadata can include some of the following:

- Author
- Company
- Copyright
- Title

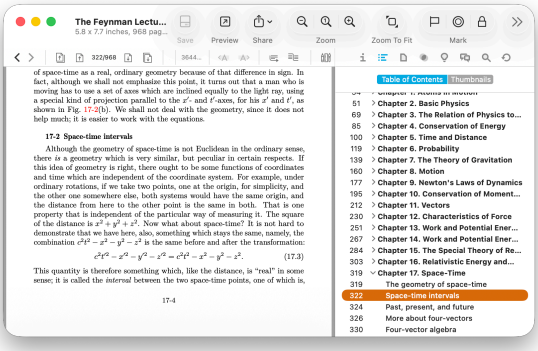
- Subject
- Keywords
- Comments
- Organization

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

There are two parameters supporting extra actions:

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

CONTENT



Navigating documents, like PDFs, can sometimes be difficult when you are just scrolling page after paragraph, paragraph after paragraph. Fortunately, the *Content* Inspector provides two views that make it easier to move through your documents: a *Table of Contents* for various types and *Thumbnails* for PDF documents.

TABLE OF CONTENTS

The *Table of Contents* shows an outline view of PDFs with an table of contents, chapters in `.epub` files, section headings of Markdown documents, or sections in rich text created with emboldened or underlined lines. Browse the outline as you would in outlining applications, expanding and collapsing sections to access the desired pages. This inspector also supports selecting multiple pages, which could be useful if you need to copy page links via the context menu.

For even quicker navigation, the table of contents can be navigated via keyboard, using the arrow keys to move around. Change pages with up and down arrows. Expand and collapse a section with the left and right arrows or hold the ⌥ Option key to fully expand or collapse sections.

When used with Markdown, rich text, and PDF documents, you can drag and drop sections and it will rearrange the text in the document.

Context Menu: The context menu commands available in this inspector depend on the type of document:

PDFs:

- **Show/Hide Page Number:** Toggles the page number of each section on or off.
- **Select/Deselect All:** Select or deselect all the sections.
- **Rename:** Change the name of a section in a PDF outline. This change is only for your

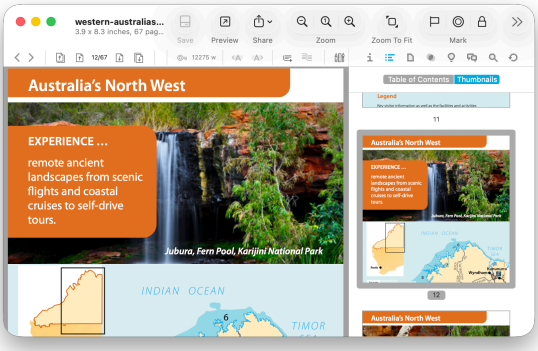
reference. It doesn't change the text in the document.

- **Delete:** Removes a section from a PDF outline. This does not remove content or pages from the document.

PDFs and supported types:

- **Copy Page/Section/Paragraph Link:** Copies the item link with the page number to the clipboard. PDFs and `.epub` files support page links. Markdown supports section links. Rich text supports paragraph links.

THUMBNAILS



Used only with PDF documents, the *Thumbnails* view show each page in a list of thumbnails. This allows for a more visual approach to moving through your document. By default, the thumbnails are shown in a single column but they can be displayed in multiple rows if the sidebar is widened. This view allows for actions like these:

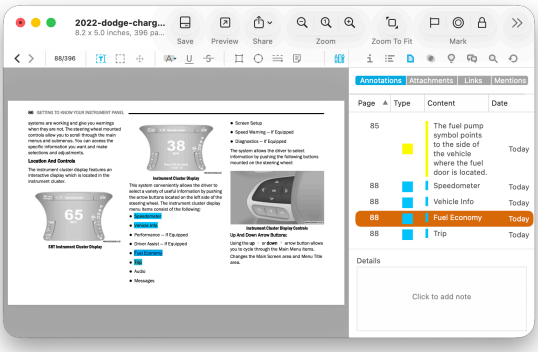
- Jump to or select any page by clicking on it. Extend a range of selected pages by holding the ⇧Shift key to select consecutive pages or hold the ⌃ Control key to select non-consecutive pages.
- To quickly remove unwanted pages, press the ⌫ Backspace key.
- If you want to reorder some pages, select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

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

- **Cut/Copy:** Cut or copy the selected page(s) to the clipboard.
- **Copy Page Link:** Copies the item link with a reference to the current page.
- **Add to Reading List:** Adds a reference to the current page to the *Reading List*.
- **Add to Table of Contents:** Adds an outline item to the table of contents.
- **Paste:** Pastes a copied PDF page into a document.
- **Split Document:** Splits the document at the current page. A new document is created from the preceding pages and removed from the current document. This item is unavailable when the first page of the document is selected. Also, note this action cannot be undone.
- **Reverse Page Order:** Reverses the page order of the document.
- **Insert Blank Page:** Insert a new blank page.
- **Delete Selected Page(s):** Delete the selected page(s).
- **Rotate Left/Right:** Rotate the selected page(s) left or right.
- **Select/Deselect All:** Select or deselect all pages in the document.

PDF Bookmarks: The *Add to Table of Contents* command mentioned above allows you to add bookmarks to specific pages. If there is no table of contents, one will be created. With the option of reorganizing and renaming items, you can create a very custom table of contents specifically for you.

DOCUMENT



The *Document* inspector provides specific information about the current document. This information is presented in four specialized views: annotations, e.g., highlights in a PDF, attachments like images in `.rtfd` files, links detected in the document, and a list of other documents mentioning the name or an alias of the current one.

ANNOTATIONS

This inspector displays a listing of the annotations in the current document, including PDFs, rich text, Markdown, and even web-based formats like formatted notes.

Each annotation is listed with the following metadata: *Page*, *Type* in color, *Content*, and the *Date* the annotation was added. In the case of highlights, Text, and Note annotations show the text in them. Rectangle annotations will show what is on the page under it. Oval and Line annotations display the *Author* set in Editing > General settings.

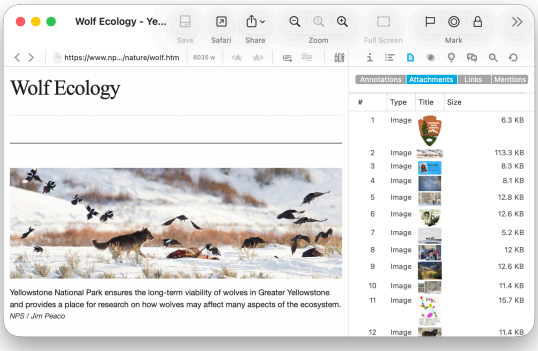
Easily navigate the document by selecting an annotation to jump to it. To reorder the list, click the desired header, e.g., *Type*, to sort on it. This makes it easy to navigate via the document's annotations.

At the bottom of the view is a *Details* section. This displays the content of *Note* and *Text* annotations and can be edited directly here. Details can be added to other annotation types as well, but only supports plain text entries.

Context Menu: The *Annotations* list offers the following commands:

- **Copy:** Copies the metadata and any text in the Details to the clipboard as unformatted text. This pastes as plain text or creates a new sheet via *Data > New From Clipboard*.
- **Copy Annotation Link:** Copies an item link pointing to the selected PDF annotation.
- **Copy Page Link:** Copies an item link to the current page in a PDF.
- **Copy Paragraph Link:** Copies an item link to the annotated paragraph in Markdown and rich text.
- **Delete:** Deletes the current annotation.
- **Select/Deselect All:** Quickly select or deselect the items in the list.

ATTACHMENTS

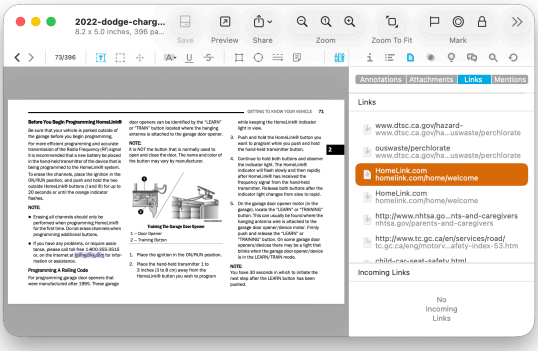


This inspector displays any attachments or embedded images in the current document. For example, in an imported email, you can see and access the attachments individually. Bookmarks and HTML-based files, e.g., formatted notes, display linked images. In Markdown, transcluded and locally linked, e.g., relatively linked, images show in preview mode; local, item, and WikiLinked images display in source mode. You can navigate the document by selecting an attachment, jumping directly to it.

Context Menu: Opening the context menu in the *Attachments* list offers a few commands. Some are only shown in certain circumstances:

- **Open In:** Opens images in viewed bookmarks in the system default browser.
- **Open in Tabs:** Opens each image in a tab in the current window.
- **Copy/Copy Name:** Copy the attachment as a file or just its name.
- **Delete:** Removes the attachment from the document, if the behavior is supported.
- **Open:** Opens the selected attachment in the system default application, e.g., Preview for images.
- **Select/Deselect All:** Quickly select or deselect the items in the list.
- **Add to Downloads:** Add the attachment to the Download Manager when viewing linked images in web content.

LINKS



This inspector lists links detected in the selected document. These may be web URLs, file URLs, item links, and even DEVONthink's WikiLinks. This provides a thorough list of links you can view and even use. (You may be surprised by the number of links in many documents.)

The top section of this inspector is the *Links* view, displaying a list of any outgoing links, i.e., links to other files, websites, etc.

Select a link in the list to show the link in the current document. But these links are active. If the link is to a document in DEVONthink, double-click a link to open it in a document window or an external application. Links to web pages launch in your browser. And if the link is a URL scheme, e.g.,

`mailto:support@devontechnologies.com`, double-click it and it will start an email in your default email application.

Context Menu: The context menu in the *Link* list offers the following options:

- **Open In:** Opens the link in the system default browser.
- **Open In DEVONthink:** If the link points to a document in DEVONthink, this opens it in a new document window.
- **Open in Tabs:** Opens the linked document in a tab in the current window.
- **Copy/Copy Name:** Copy the attachment as a file or just its name.
- **Delete:** Removes the attachment from the document, if the behavior is supported.
- **Open:** Opens the selected attachment in the system default application, e.g., Preview for images.
- **Select/Deselect All:** Quickly select or deselect the items in the list.

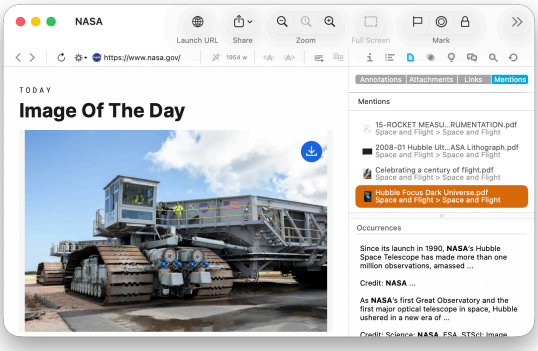
- **Add to Downloads:** Add the attachment to the Download Manager when viewing linked images in web content.

The bottom section of the inspector is the *Incoming Links* section. This shows DEVONthink documents containing links to the current one. Selecting a document here will display it in the view/edit pane. Double-click it to open it in a document window. You can actually select these documents and drag and drop them to another location. Be aware the default behavior is moving them but you can use hold modifier keys while dragging to duplicate or replicate them instead.

In the *Incoming Links* section, the context menu has these commands:

- **Open In DEVONthink:** Opens the document in a new document window.
- **Open in Tabs:** Opens each image in a tab in the current window.
- **Reveal:** Displays the document in it location in your databases.
- **Copy/Copy Name:** Copy the attachment as a file or just its name.
- **Select/Deselect All:** Quickly select or deselect the items in the list.

MENTIONS

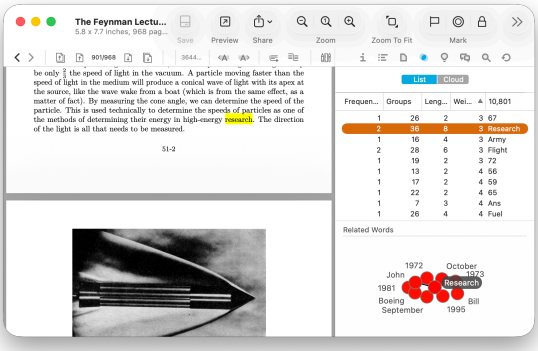


This inspector is similar to the *Incoming Links* pane of the Links inspector, however it works with something called "mentions". Imagine you have a document named "NASA". As you're writing about the Apollo 13 mission in another document, you include the word "NASA". You have just "mentioned" it. If you look at the NASA document, the Apollo 13 document is now listed in this inspector. Mentions also work with aliases on documents and powerfully includes mentions from any indexable file type, including PDFs.

Select a listed document to show a summary of the mentions in the lower pane. Double-click one to open it.

Context Menu: The *Mentions* section uses the suite of same commands as the Attachments and Links views, but also one special command: *Copy Summary*. This copies the text from the *Occurrences* pane for the clicked document. This can be used to create a new document or pasted as rich text.

CONCORDANCE



The *Concordance* pane, opened in the *Tools > Inspectors* menu, gives you a tool for analyzing the textual contents of documents. When the inspector is open, selecting different items will show varying results. If one or more documents is selected, the results will be inclusive of the text in all of them. If there is no selection, the results will be based on the text of documents in the current location, whether a group or a database. This also applies to selecting items matched in smart groups, both local and global.

These results are presented in two views: *List* and *Cloud*.

LIST

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

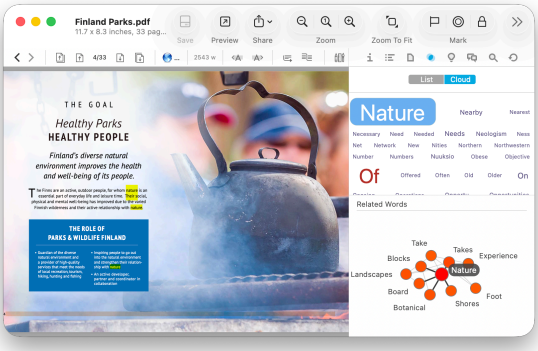
- Word frequency
- Number of groups with items containing a specific word
- Word length
- Word weight (relevance, depends on the contents of the database)
- Alphabetical listing

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

Context Menu: The following commands are available in the context menu of the List view:

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

CLOUD

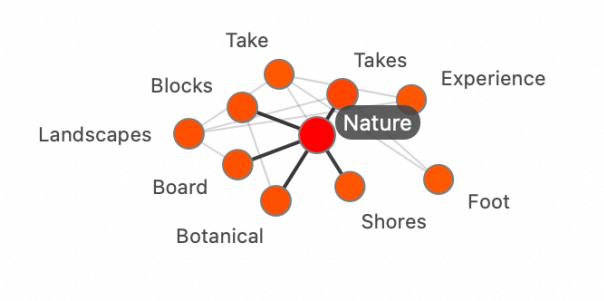


The *Cloud* view present the concordance as a word cloud. The size of the terms is relative to the frequency in the selection or database. Selecting terms highlights the occurrences in the current document.

Context Menu: The commands found in the List view are also found in the Cloud view, with two additions:

- **Export:** When used with the word list in the *Cloud* inspector, exports a PDF of the word list.
- **Sort:** Sort the word cloud *by Name* or *by Count*.

RELATED WORDS

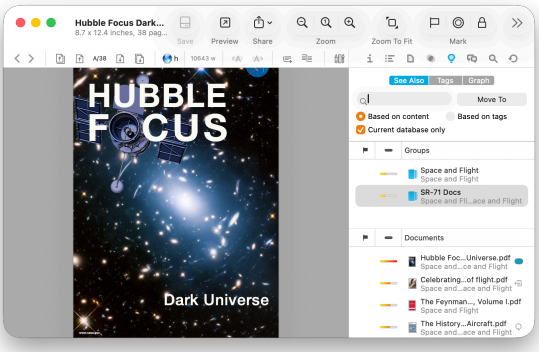


Of special note is the *Related Words* graph shown under the *List* and *Cloud* views. Select a word in the list or cloud and it becomes the central term in a graph of related words.

These are words found throughout your database. Double-clicking a node initiates a database-wide search. The context menu provides options for copying the word's information, as well as excluding the word. Additionally, use the *Export* command to create a PDF of the graph.

Context Menu: The context menu of this section contains a few of the same commands: *Copy*, *Add to Tags*, *Exclude/Include Word*, and *Export*. The last command exports a PDF of the graph as shown.

AI



We all have many documents in our databases and more seem to come in daily. For the incoming documents, efficient filing is often needed. For existing documents, we may need to locate related documents. These inspectors are driven by DEVONthink's internal AI, the "brain" of our application. It stays busy analyzing the contents and locations of all the documents in your databases and making connections between them.

SEE ALSO

Choose *Tools > Inspectors > See Also* to open this inspector. When the inspector opens, you will be presented with two sections, *Groups* and *Documents*, each containing suggestions to assist in filing the document or recommending other related documents.

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

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

Below the search field are two options to help focus the results presented in the two panes: *Based on content*, enabled by default, makes its suggestions based on content comparisons, while *Based on tags* uses only the documents tags for matching. Since results can be shown for all databases, *Current database only* restricts the suggestions to the active database.

On a related note, in the *Data* menu, you will find two menu items using these recommendations:

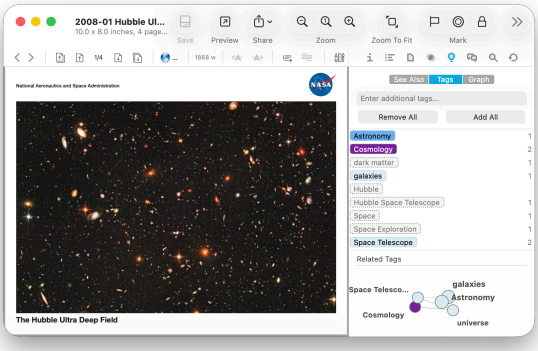
- **Move > Move to ... again:** Moves a selected document to the location last used by classification.
- **Classify to...:** Classifies the selected document to its top ranked suggestion shown here.

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

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

Context Menu: The context menu items available in these two sections are the ones used the item list.

TAGS

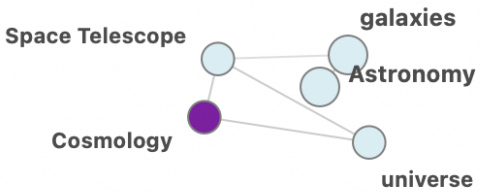


As mentioned in the Tagging section in this help, there are a variety of ways to apply tags to a document. You can also filter items by tag in the *Tags filter* pane. But knowing what tags to choose isn't always obvious. Driven by DEVONthink's internal AI, the *Tags* inspector lets you view and modify tags as well as view relationships between tags related to the current document.

Open this inspector via the *Tools > Inspectors > Tags* command. When the inspector opens, you will be presented with two sections: the *Tags list* and *Related Tags*.

Tags List: Select a document with this inspector open. The tags list in the top section displays: tags already applied, potential tags, or both. Applied tags are shown in blue; suggested tags in grey with a dotted border. If you want to add a recommended tag, double-click it. If you want to add all the suggestions, press the *Add All* (⌃A) button. Clicking the *Remove All* (⌃R) button will clear all the document's tags. And if you want to add tags not listed here, enter them in the Tags field at the top of the inspector. As you add and modify tags, the recommendations will often change. This helps fine-tune your tagging choices.

If you're working in the *Global Inbox*, the suggestions come from any open database. However, if you're working in a separate database, only its tags are considered.



Related tags: The bottom section shows the relationship between a selected tag and other related ones. Tags applied to the document are shown as light blue circles with a solid border connected with a line. Suggested tags are shown in grey with a dotted border. Related tags are shown in varying colors and sizes, depending on how strong a relationship they have to the central tag or the others. If a tag has been used with other tags, they are connected with a line. Double-click a tag to add it to the current document.

Context Menu: The context menu in the Tags list provides these commands, relative to what is selected:

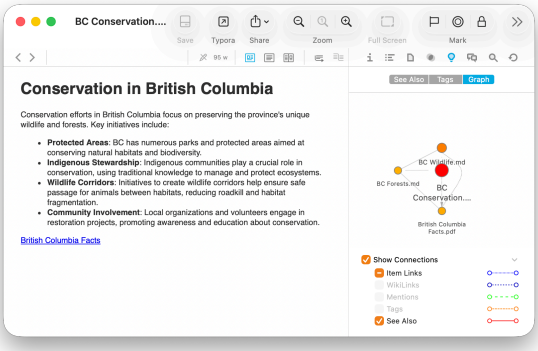
- **Get Info:** Display the *Info popover* for the selected tag.
- **Reveal:** Show the tag in the *Tags* group of its database.
- **Add/Remove All/Selected Tags:** Add or remove every listed tag or just selected ones.

- **Select/Deselect All:** Select or deselect all listed tags.
- **View as Cloud/List:** Show the tags as a tag cloud or list.
- **Sort by Count/Name:** Sort the tags by the number of documents in each tag or alphabetically, both ascending sorts.
- **Export:** Export a PDF of the listed tags as shown. The resulting document shows the tags just as they're shown in the inspector.

The context menu in the *Related Tags* section contains the *Get Info*, *Reveal Tag*, and *Export* commands.

> Note: As this inspector is driven by our internal AI, it doesn't suggest tags unless there is at least one tag already applied.

GRAPH



In DEVONthink, documents connect to other items in many ways but these relationships aren't always obvious. Links, content, and even tags create contextual relationships that may be important to you. While these are useful individually, you may want to see these connections in one place. This inspector examines a variety of connection types for the selected document and displays a network graph of how it is related to other documents.

Open this inspector with the *Tools > Inspectors > Graph* command. Now select a document. The main area of this inspector displays the network graph. The current document is at the center, shown in a red circle with related documents shown as satellite nodes. Click the central node and the connections (technically called edges) highlight. Direct edges highlight in blue. Connections between other nodes display in grey. Now select a satellite node to see its direct connections. Magnify the graph with two-finger tapping or pinch-to-zoom. If you want to jump to a certain item in the graph, double-click it. It will open in the current window with a new graph of its relationships. To return to the previous document, choose *Go > Back* or press ⌘[.

When you click on a node, the style of the connection line is based on the connection type. These types and styles of connection lines are shown in a collapsible *Show Connections* section at the bottom of the inspector. For reference they are:

Connections:

- **Item Links:** Documents containing items links to other documents are connected by a dotted line.
- **WikiLinks:** Documents detected dynamically as *WikiLinks* are displayed by short dashed lines.
- **Mentions:** Documents whose name is used in other documents, as shown in the *Mentions* inspector, are connected to the current document by loose, long-dashed lines.

- **Tags:** *Tags* applied to the document are shown with tight, long-dashed lines.
- **See Also:** Documents determined by DEVONthink's AI as being contextually related to the current document, as shown in the *See Also* inspector, are indicated by solid lines.

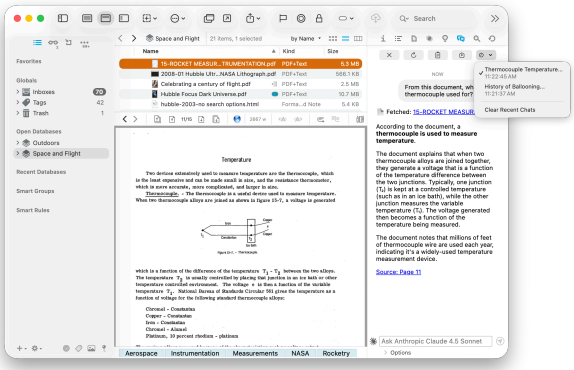
In the connections key, only available options are enabled. For example, if there are no tags applied, the *Tags* option will be disabled. For any enabled type, toggle them on or off, as needed.

Context Menu: If no node is selected, the context menu supports creating a PDF of the graph as shown via the *Export* command. But if a node is selected, you also have these options available:

- **Open:** Open the document in a new document window.
- **Open in Tabs:** Open the document in a new tab in the current window.
- **Show in Finder:** Open a Finder window showing the current file selected. Be cautious using this command with imported files.
- **Copy Item Link:** Puts the unique URL for the item on the clipboard.
- **Get Info:** Open the *Info popover* for the item.
- **Reveal:** Reveals the item in its current location.
- **QuickLook:** Displays a QuickLook preview of the item.

While network graphs like this are visually interesting, when they become too complex they lose practicality. DEVONthink strives to strike a balance between depth and utility so the graph can actually be used on a regular basis.

CHAT



This inspector provides a place to "talk" to your chosen AI provider. Make general inquiries or possibly even questions about the selected item or your database. And for tools-compatible models, it can accept some DEVONthink-related commands.

Open this inspector with the *Tools > Inspectors > Chat* command. The main area of this inspector is where your chat is shown, displayed in a style similar to Apple Messages. At the bottom is the query field where you ask your questions and commands. This displays the default AI provider you chose in the *AI* settings. To the left of this field is a dropdown menu where you can switch to a different model, if available.

At the top of the inspector are a quintet of buttons, each with a corresponding shortcut:

- ✕ Clears the current chat to start a new one. (⌘K)
- Copies the entire chat to the clipboard as tab-delimited text. This can be used in a

spreadsheet application or to create a new DEVONthink sheet.

↻ Resends the last prompt. This can be useful e.g., after changing chat models. (⌘R)

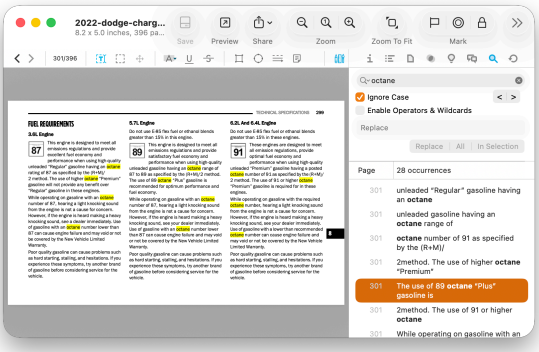
⇩ Saves the entire chat to the current location with a name and format you choose. Export formats include: *Plain Text*, *Rich Text*, *Formatted Note*, *HTML Page*, *Markdown*, *Sheet*, or *Messages (JSON)*. (⌘S)

◴ Displays a list of recent chats, segregated by date. Choose a previous chat to reload it and its settings in the inspector. Also. this will attempt to reveal or open the document associated with the chat.

Context Menu: The context menu in the search hits has these commands:

- **Copy Image/Subject:** Copies an image or the detected subject of an image to the clipboard.
- **Capture Image/Subject:** Save a document from the image or the detected subject of an image.
- **Copy/Save Chat:** Copy the current chat to the clipboard or save it as a new document in your chosen format.
- **Resend Last Message:** Resend the last prompt entered. Often used after changing models or for checking a previous response.
- **Save All Images:** Saves images from the current chat when multiple images exist.

SEARCH



The *Search* inspector provides in-document searching for any document whose content has been indexed. Accessed with the same familiar ⌘F hotkey you use in most macOS applications, you can not only search, but replace found words.

Search and Replace: The top section of this inspector is not only where you enter your search terms, but also has controls for how to match or replace words.

- **Search field:** Enter your search terms here. By default, substrings are matched, so searching for `board` will match `board`, `onboarding`, or `clipboard`. If you have multiple words, they must occur in the document in the specific order you enter and only the last word supports substrings, matched at the beginning of the word. You also can't use quoted terms or advanced options, like boolean operators..
- **Previous/Next Highlight:** Steps through the highlighted search hits.
- **Ignore Case:** Choose whether capitalization affects what words are matched.
- **Enable Operators & Wildcards:** Allow use of quoted terms and the advanced search operators and wildcards, like `NEAR`. If you enable this you can't match substrings,

so you'll need to enter exact words or use wildcards. If you use a proximity operator, e.g., `trouble* NEAR sync*` the first and second terms will show in yellow or green highlights in the preview.

- **Replacement text:** Enter a replacement for the terms for which you're searching. Click *Replace* to replace the current occurrence. Choose *Replace All* to replace all occurrences in the document. Press *In Selection* to replace words only in text selected in the view/edit pane.

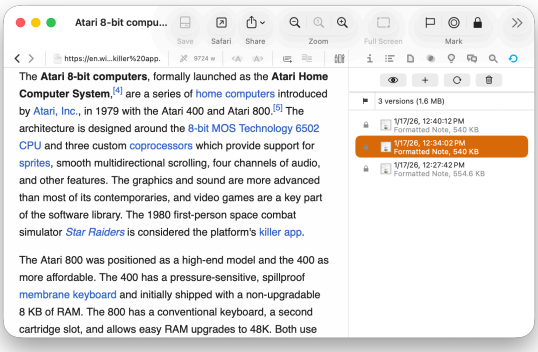
Search Hits: The results provide a convenient list of the found words. This includes the line number of each hit and the number of occurrences found. It also includes part of the surrounding text to help give some context to the found words. Click a search hit to navigate to and highlight the words in the view/edit pane. Select a search hit and copy it to the clipboard or drag and drop it to a database or other document.

Context Menu: The context menu in the search hits has these commands:

- **Copy:** Copies the selected search hit(s).
- **Copy Paragraph/Page Link:** Copies an item link pointing to the selected paragraph for rich text files or the page for PDF documents.
- **Capture with Source Link:** From a selected search hit, this creates a new document via the *Sorter* with the search term and a link to its occurrence in the current document.
- **Add to Favorites:** Adds the current document to the *Favorites*.
- **Add to Reading List:** Adds the current document to the *Reading List*.
- **Select/Deselect All:** Selects all or none of the items, respectively.

> Note: In-document searches only work on the document displayed in the view/edit pane.

VERSIONS



For those editing documents, versioning provides a backup mechanism for your edits. As you work and save a document, the current contents of the document is preserved as a separate version attached to it. If you make a mistake or want to return to a previous state of the document, you can preview and restore a version from this inspector.

As you work and save the document, including automatic saves, e.g., when switching to another document or application, a new version is added to the top of the list. Old versions move downwards and the oldest is purged if you exceed the maximum number of versions. To avoid generating too many versions, a new version is only generated if two or minutes have elapsed since the last save.

In order to use versioning, it must be enabled in the *Database Properties*. This is a per-database setting so make sure to enable it on any database you want to use the feature.

Open this inspector via the *Tools > Inspectors > Versions* command and select a document.

At the top of the inspector are two buttons working with a selected version:

- **QuickLook:** Opens a QuickLook window showing what the selected version looks like. This is useful when the view/edit pane isn't open. While this window is open, use the up and down arrow keys to view each version individually.
- **Add Version:** Manually create a new named version. Note named versions are retained, not purged when your maximum number of versions is reached.
- **Restore Version:** Replaces the contents of the document with the contents of the selected version.
- **Delete Version:** Deletes the selected version.

Beneath these buttons are the *Flag* column and versions info. The version info displays how many version exist for the document and the aggregate total space these versions use. Every version is locked by default. Select a version and click the ⚑ column to flag it.

The main area of the inspector shows the versions available for the selected document, listed from newest to oldest. Each version is listed with the data and time it was saved, but also the size of the document for that version. Versions contribute to the size of a database so you should thoughtfully set the number, maximum size, and how long they should be kept in the *Files > General* settings.

Context Menu: The context menu in this inspector contains the same commands as the suite of buttons at the top. But it also allows lets you clear everything via the *Remove All Versions* command.

MENUS

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

THE APPLICATION MENU

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



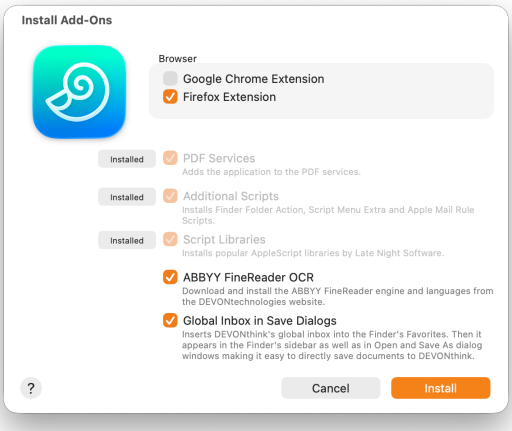
ABOUT & CHECK FOR UPDATES

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

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

ADD-ONS

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



The following options are available.

- **Google Chrome Extension:** Opens the Chrome Web/Store page in Google Chrome where you can install the browser extension. You have to do this manually and follow Google's rules.
- **Firefox Extension:** Opens the Mozilla Add-Ons page in Firefox where you can install the Firefox add-on (similar to the Safari extension). You have to do this manually and follow Mozilla's rules.
- **PDF Services:** Adds *Save PDF to DEVONthink* to the PDF menu of print dialogs. This allows you to print a PDF directly to DEVONthink.
- **Additional Scripts:** Installs the mail rule scripts for Apple Mail, Folder Action scripts , and Menu extra scripts.
- **Script Libraries:** Installs some popular third-party script libraries from Late Night Software: *CalendarLib EC*, *Dialog Toolkit Plus*, *PrefsStorageLib*, and *RegexAndStuffLib*.
- **Global Inbox in Save Dialogs:** Inserts DEVONthink's Global Inbox into the Finder's sidebar, making it accessible from any Open or Save dialog in any application on your Mac that can save a document.

  Note: The name of the inbox is "Inbox" regardless of your computer's language preferences.

- **ABBYY FineReader OCR:** Installs the ABBYY Finereader OCR for creating searchable content from images and PDF documents without a text layer.

> Note: The Safari browser extension is now installed by default, but you'll need to go into Safari's *Settings > Extensions* and enable it. Also while extensions for browsers like Opera, Vivaldi, and Brave are not explicitly available, it is possible to install them from the Chrome Web Store, while in those browsers.

SETTINGS, TRASH, CACHE

Settings: Opens the application *Settings*.

Empty Trash: Empties the contents of all open databases' trash to the system trash.

Empty Cache: Empties the web browser cache. This frees up space and makes sure that all data is freshly loaded instead of using a cached copy.

PURCHASE & LICENSES

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

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

SERVICES

Services: The *Services* submenu gives you access to special commands published by DEVONthink, other Mac applications such as TextEdit or Safari, or our own WordService or CalcService utilities.

Hide DEVONthink: Hide all DEVONthink windows.

Hide Others: Hide other application windows.

Quit DEVONthink: Quits the application.

THE FILE MENU

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

NEW & OPEN

New: Create new databases in your selected location. Read more about each type in the Building Your Database section.

- **Database:** Creates a unencrypted database.
- **Encrypted Database:** Creates an AES-256 encrypted database file at a user-specified size.
- **Revision-Proof Database:** Creates an archival database for storing information that cannot be subsequently modified. This creates a database that conforms to many governmental and legal policies.

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

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

New Window: Opens a new *main window* for a selected database.

IMPORT & EXPORT

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

- **Files and Folders:** Imports selected files or folders to the current location. Finder comments will be imported. Finder tags may be imported if enabled in the *Import > Tags* settings.
- **Bookmarks:** Imports bookmarks from: Brave, DEVONagent Pro, Firefox, Google Chrome, or Safari. Bookmarks are imported into a newly created group bearing the name of the chosen browser. Only new bookmarks are imported if you use this command again.
- **Bookmarks from HTML file:** Imports bookmarks from an HTML file, e.g., exported from the Orion browser.
- **Contacts:** Imports Apple Contacts addresses selected in the import dialog into a newly created group named "Addresses". Contacts can be imported as a sheet, as vcards (`.vcf`), or as bookmarks.

Previously created groups are reused. Tip: To import all addresses, select all addresses in the group "All" and import them. Address card bookmarks link to the original card in the Contacts application.

- **Folders & Attachments from Notes:** Imports your notes from Apple Notes.

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

- **Document:** Exports the currently viewed document in its native format. For images exported from a separately opened document window, DEVONthink lets you choose the desired file format or image quality. E.g., you can export a PNG file as a JPEG file.
- **Files and Folders:** Exports the selected documents in their native format. Groups are exported as Finder folders, preserving the group structure you have built in DEVONthink. DEVONthink tags are applied as Finder tags to the exported files. Internal metadata for the items is preserved in `.DEVONtech_storage files` in the exported folders. These files are used for reimporting into DEVONthink. If you will not be reimporting the exported files, you can safely delete those files. Be aware the addition date of reimported items will change, if that is a critical piece of metadata for your database.
- **as HTML Bookmarks:** Export selected bookmarks as an consolidated HTML file that can be e.g., imported into Safari.
- **as LaTeX Document:** Exports Markdown documents as LaTeX (`.tex`) files, preserving title, author, and date metadata, if available.
- **OPML:** Exports the selected items as one OPML file.
- **PDF Document:** Exports the selected items as a paginated PDF. Hold the ⌥ Option key to change allow the command to *PDF Document without Annotations*.
- **as PDF Document (LaTeX):** Exports Markdown documents as LaTeX formatted PDF documents, complete with embedded images, active hyperlinks, etc. Note this requires `pdflatex`, typically made available by installing MacTex or possibly the smaller BasicTex.
- **RTF/RTFD Document:** Exports the selected items as one merged rich text file without embedded items (RTF) or with them (RTFD).
- **Text:** Exports the selected items as one merged plain text file.
- **Word 2007/97 Document:** Exports the selected items as one merged Microsoft Word `.docx` (Word 2007) or `.doc` (Word 97) document. Converts LaTeX and MathJax equations when exporting from Markdown documents. For the best conversion, use the newer format.
- **Website:** Exports the selected items as standalone web site that you can upload to your web server and share with colleagues. In the presented dialog window, choose the desired template, text encoding, and whether DEVONthink should convert diacritics and accented characters to

HTML entities or not. Check *Create Index Pages* to create `index.html` pages with cross-links to all included documents. Markdown and formatted notes are rendered to HTML, other file types that cannot be displayed in a web browser, e.g., Pages files, are converted to PDF if possible. Cross-links are converted correctly. For the export templates are used that you can modify yourself.

- **HTML Bookmarks:** Export the URLs of all selected items and their children as an HTML bookmarks file.
- **Template:** Saves the selected documents as a template, which can then be used to quickly create new documents using *Data > New from Template*. Export multiple documents and/or groups at once to create e.g., a project template. *Data > New from Template > Open Template Folder* can be used to organize templates.
- **Database Archive:** Creates an optimized ZIP file of the current database in the selected location. This can be useful as a secondary backup strategy. Databases are exported in their original format, e.g., an encrypted `.dtSparse` file. For encrypted and revision-proof databases, you will need to provide an encryption key before exporting.
- **Metadata (JSON):** Export the metadata of the selected items as JSON data.

Share: This opens the standard Mac Share menu.

INDEX AND UPDATE

Index Files and Folders: Link to files in the Finder, leaving them in the current location. See the In & Out > Importing & Indexing section for important information on indexing.

Update or Refresh: This command dynamically changes, relative to what is currently selected.

- **Update Indexed Items:** Force DEVONthink to check for filesystem events and newer file dates on indexed items, and update them as needed. This is often used when indexing cloud-synced locations, e.g., folders in Dropbox, or when indexing items on networked volumes, as some volumes don't reliably support filesystem events.
- **Update Items:** Similar to *Update Indexed Items* but works with imported items. Sometimes used after editing documents in external applications when the application or the database is closed. It may also be needed when accessing a database stored on a networked volume.
- **Refresh Feed:** Manually refresh selected RSS feeds.

SYNCHRONIZE

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

Download Pending Files: Downloads the files of selected documents if they are available through one of the database's locations. Only necessary if none of the database's locations is set to synchronize indexed files.

DATABASE PROPERTIES & CLOSE

Database Properties: Opens the *Database Properties* popup for the current database. This panel presents a few options, statistics about the database, and allows you to change the displayed name, add comments, and add a username and password.

Close Database: Closes a selected database. If multiple databases are open, use *Close All* to close them all at once. If you'd like to keep the current database open but close the others, use *Close All Except*. Note that closed databases will not reopen on launch. Only databases that were open when DEVONthink quits will reopen on the next launch.

DATABASE MAINTENANCE

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

Verify & Repair: Verifies all database structures and repairs them if possible. By default, DEVONthink automatically verifies the database structure every time you open a database. If it finds significant errors, DEVONthink will advise you to run this command.

Use this command whenever you feel it is necessary. If you're a heavy user of DEVONthink, running a Verify & Repair once a week or more often is a good idea.

Check File Integrity: Verifies the stored checksum for each file in the database. The results are reported in the *Log* window or popover. Note: If you are indexing files and they have not been updated, they will report a checksum error. See also p. 82ff

Optimize Database: Creates an internal backup of the database and then optimizes the database structure. Optimizing removes unnecessary internal elements from the database and rebuilds the internal structure to optimize performance. DEVONthink also creates internal backups on a regular basis. Hold the ⌥ Option key to display the *Restore Backup* option. This allows you to roll back the metadata to a previous date. This option would only be used in troubleshooting situations.

Rebuild Database: Completely rebuilds the database by exporting all items to a temporary folder in the file system, creating an empty database, and reimporting all items. This removes any structural problems. Depending on the size of your database, this can take from a few seconds to several hours. This option is typically only used in a troubleshooting situation.

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

> Note: For more information on database issues, including reports in the Log window or popover, see the Repairing a defective database section.

PRINT

Page Setup: Sets your preferred page size and printer settings.

Print: Prints the current document or view.

PRO/SERVER COMMANDS

These commands are only available in the Pro and Server editions of DEVONthink.

Import

- **Images (with OCR):** Imports images and applies optical character recognition (OCR) to create a searchable PDF. This makes all written text searchable and available to DEVONthink's AI functions. You can change the setting in *OCR* settings.
- **References from Bookends:** Imports references from the Bookends application as rich text documents. These are stored in a *Bookends* group in the root of the current database. When run, you will have the choice to import the *selection* in Bookends or references from one of various collections. Several properties from Bookends are applied as *custom metadata*, e.g., the abstract, authors, DOI, etc., if available in Bookends. Keywords are imported into the *Keywords* field. Already imported references are updated, not duplicated.
- **Unix Mailbox:** Imports Unix mailboxes, like those exported from Apple Mail.
- **Website:** Opens the Download Manager and downloads a complete web page/site for archiving and offline viewing. By default, groups created by the *Download Manager* are excluded from tagging.

Export

- **Unix Mailbox:** Exports selected emails as a Unix mailbox, `.mbox` file, that can be shared or imported into many email applications.
- **Database Audit Report:** Exports a full report accounting for all the documents added to an revision-proof database. This includes the original filename on import, unique identifiers, deletions and their date of deletion, etc. Exported as a `.csv` file for use in other applications, e.g., Excel.

THE EDIT MENU

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

UNDO, CUT/COPY/PASTE, ...

Undo/Redo: Use these commands to undo or redo the last action, e.g., to undo deleting a file. *Undo* and *Redo* work for many actions.

Cut/Copy/Paste: Cut, copy, or paste as standard behavior.

Copy with Source Link: Copies selected text and a link to the current document. This text and link can be pasted into other applications.

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

Copy Item Link: Copies a DEVONthink-specific URL, called an item link, that links to the selected document or group. These links can be used to create a backlink to the item in your database in applications that support live hyperlinks. For certain file types, there are alternate item links that appear when

holding the ⇧ Shift key. These alternate links are discussed in the individual sections in the Documents chapter.

Paste with Source Link: When copying text from files in DEVONthink, use this command to paste the text in rich text and Markdown documents with a link back to the source document.

Paste and Match Style: Pastes text from the clipboard, matching the styles in the current document. This can also be used when pasting rich text into Markdown documents.

Delete: Deletes the selected piece of text.

Complete: Tries to auto-complete the partial word before the insertion caret. This standard Mac function uses the currently active dictionary, chosen in the language dropdown of the *Spelling and Grammar > Show Spelling and Grammar* panel.

Select All/Deselect All: Selects or deselects the complete content of the frontmost document. Hold the ⇧Shift key to reveal the *Deselect All* option.

TAGS, SET NAME

Tags: Quickly apply tags to the current document. This displays the *Tag bar*, if necessary.

Set Name As: Applies the selected text as the document's name.

FIND, SPELLING, INSERT

Find: This submenu contains standard Mac find commands, like those available in TextEdit. Searches on the current document are displayed in the Search Inspector. Two commands of note are:

- **In Database:** Puts the cursor in the *toolbar search field* of a main window.
- **Find:** Opens the *Search* inspector.
- **Find Next/Previous:** Steps through search hits in the document.
- **Use Selection For Find:** Uses the selected text as the search term in the *Search* inspector.
- **Scroll To Selection:** In long documents, this command scrolls the current document to selected text.

Spelling and Grammar: Provides the standard macOS functionality for checking text for spelling or grammar errors. To choose the language used for spell checking, or for auto-completion (see above), open the spell checker panel with *Edit > Spelling and Grammar > Show Spelling and Grammar* and choose your language of choice from the pop-up menu.

Substitutions: Shows the standard *Substitutions* settings panel where you can toggle the options on and off manually: *Smart Copy/Paste*, *Smart Quotes*, *Smart Dashes*, *Smart Links*, *Data Detectors*, and *Text Replacements*. *Data Detectors* analyze shown text and make context-sensitive actions available, e.g., when you hover the cursor over a phone number or postal address.

> Note: The *Spelling and Grammar* and *Substitutions* commands can be temporarily applied to the current document. If you'd like these to be persistent choices, you can make global changes in *Settings > Editing*.

Transformations: Use this submenu to change selected text to all lowercase or uppercase, or to capitalize every word.

Speech: Starts or stops speaking the selected piece of text.

Insert: Inserts items, like pictures, checkboxes, bulleted lists, etc. The options available are dependent on the current file type.

DICTATION & EMOJIS

Start Dictation: Starts the Mac's dictation function.

Emoji & Symbols: Shows the standard *Special Characters* panel for inserting characters and emoji that you cannot enter directly with your keyboard.

PRO/SERVER COMMANDS

These commands are only available in the Pro and Server editions of DEVONthink:

- **Summarize via Chat:** Opens the *Summarize and Transform* popover and processes the selected document or its selected text to present a summary. The default results are set via the *Summaries* dropdown in the *AI > Chat* settings.
- **Transformations > Transform Text via Chat:** This also opens the *Summarize and Transform* popover and processes the document or its selected text to present alternate styles.

THE DATA MENU

The *Data* menu contains all commands that deal directly with documents or groups. Here you'll find commands for creating, labeling, classifying or group new documents, and more.

NEW DOCUMENTS & TEMPLATES

New: This submenu provides access to the built-in items DEVONthink allows you to create.

- **With Clipboard:** Creates a new document based on the contents of the clipboard. Note: Some applications such as Microsoft Word put data in multiple formats into the Clipboard. DEVONthink tries to use the most logical data when creating a new document.
- **Take Note:** Opens the *Sorter* to the *Take Note* view. If the *Sorter* is not shown, it opens the *Take Note* window.
- **Plain Text:** Creates a new plain text document.
- **Rich Text:** Creates a new rich text document.
- **Formatted Note:** Creates a new formatted note.
- **Markdown Text:** Creates a new Markdown text document.
- **HTML Page:** Creates a new HTML page. You can use the built-in macOS WYSIWYG editor to edit the HTML page or switch to its source code (from the navigation bar) and edit it directly.

- **Sheet:** Creates a new sheet. Add columns to the new sheet by using the + button or by pressing the ↩ Return key. Name the columns and sort the sheets by dragging them with the mouse. Click *OK* to create the new sheet.
- **Script:** Opens the *Script Editor* window where you can draft scripts for various purposes: *Generic*, *Smart Rule*, *Reminder*, or *Output*. Supports both AppleScript and JavaScript (JXA). In the Pro and Server editions, AI can be used to help draft and potentially resolve some common scripting issues.
- **Bookmark:** Creates a new bookmark. Type the URL and optionally name it to create a bookmark, just as any browser does. If you don't type in a name, DEVONthink will set one automatically.
- **Feed:** Creates a new RSS feed document. The feed behaves like a special type of group that contains RSS entries published by the feed's author. Type the URL and optionally enter a name. If you don't type in a name, DEVONthink will attempt to set one automatically. You can change the URL later by selecting the feed document and changing the URL field in the Info inspector.
- **Group/Tag:** Create an empty group. This option appears as *Tag* if you are currently in the *Tags* group of a database.
- **Smart Group:** Opens the Predicate Editor to set up criteria for a local smart group.

New from Template: This submenu allows you to access any installed templates, including your own. There are two other commands to note:

- **Open Templates Folder:** Select this to open `~/Library/Application Support/DEVONthink/Templates.noindex` in the Finder. You can add your own documents to be used as templates here.
- **More Templates:** Opens the Extras section of the Support Assistant to install any available DEVONthink templates.

OPEN, LAUNCH, REVEAL, SEND

Open: Opens the selected document or group in a separate document window. This command opens a second main window for the selected group. If you have selected multiple documents, hold the ⌥ Option key to display the *Open in Tabs* command. If the View/Edit pane is visible, this opens the selected items in new tabs. If the View/Edit pane isn't visible, a new document window will open with each selected document in its own tab in the window.

Open with: Displays a list of applications compatible with the current file type. Opens the selected documents in the chosen application. If your desired application is not listed in the submenu, choose *Other* to browse for it.

Launch URL: Opens the file, folder, or internet location indicated by the URL field in the *Generic Info* inspector. The URL will be opened in the background if you hold the ⌥ Option key.

Reveal: Reveals the location of the frontmost document in either the same main window, if possible, or by opening a new one.

Show in Finder: Opens a new Finder window with the item selected. Note this only works for documents and indexed groups.

Send by Email/Reply: Creates a new message in the system default email application and adds the selected items as attachments. If the selected item is an email message, the command is *Send Reply* and a draft reply is created instead. Note attaching files requires having an email application that supports AppleScript.

SAVE AND REVERT

Save/Save All/Revert To Saved: Saves the frontmost document or all documents to disk. Hold the ⇧ Shift key to show the alternate menu item, *Save All*.

Revert To Saved: Restores the frontmost document to the last saved version.

FAVORITES, READING LIST, REMINDERS

Add To: Commands in this submenu add the currently selected documents to your *Favorites*, the *Reading List*, or the current PDF page as a bookmark to the *Table of Contents* inspector.

Annotate & Remind: A dual purpose submenu where you can set or remove a *due date* on a selected item or directly create an *annotation file* via a chosen template, linked to the currently selected item.

MOVE

Move to: The commands in this submenu let you quickly move items in your database and control imported and indexed files.

- **Move to…:** Opens the *Move To* popover.
- **Move to ():** Quickly move selected files to the last destination used in the See Also inspector.
- **Put Back:** Returns an item to its previous location, e.g., after accidentally moving something to the database's Trash. Note this only remembers the previous location, so you cannot undo multiple moves.
- **Move Into Database:** Use this command to move an indexed file into the database. Use this command with caution as it moves the file from its current location into the internals of your database. It does not copy the file.
- **Move To External Folder:** Use this command to move a non-indexed item, e.g., imported or created in DEVONthink, out to an indexed folder in the Finder.

DUPLICATE, GROUPS, AND CLASSIFY

Duplicate: Creates a duplicate of the selected items. The name of the new item ends in "copy", and because their contents are identical both items are marked with the icon for duplicates (or, depending on your preferences, show their name in bold and blue).

Group Items: Creates a new group containing all the selected items. This is similar to creating a new group and moving the selected items into it. The alternate command *Group Similar Items*, shown when the ⇧ key is held, will attempt to file selected items with similar content in groups.

Ungroup Items: The exact opposite of *Group Items*. Moves all items in the groups one level up and deletes the now-deserted groups.

Classify: Using DEVONthink's AI, this command will move selected files to an AI suggested location. If multiple locations are available, this will replicate the item to them.

MARK, RATING, LABELS, TAGS

Mark: Allows you to mark the item as flagged/unflagged, locked/unlocked, and read/unread.

Rating: Allows you to set a rating, from no stars to five stars.

Label: Allows you to mark the selected groups or documents with one of seven labels you've defined in the *General > Labels* settings.

Tags: This submenu offers special commands for tagging items.

- **Convert Hashtags to Tags:** Converts hashtags into DEVONthink tags. The hashtag must be prefixed with the # symbol and entered as a single word without spaces, e.g., `#software-rules`.
- **Convert Keywords to Tags:** Converts keywords, found in the *Document > Properties* inspector for PDF or rich text files, into DEVONthink tags.
- **Convert Properties to Tags:** Converts the *Author* property, found in the *Document > Properties* inspector for PDF or rich text files, into a DEVONthink tag.
- **Convert Geolocation to Tags:** Converts available geolocation data into DEVONthink tags.
- **Assign Existing Tags:** Using DEVONthink's internal AI to examine tags on similar documents, the selected document will have matching tags applied.
- **Add Vision Suggestions to Images:** Adds tags to selected images using Apple's machine learning technologies.

CONVERT, THUMBNAILS

Convert: This submenu contains commands for converting between some file formats, e.g., between rich and plain text. Note the options presented are dependent on the type of the selected document. Also, due to differences in the formats, any formatting in the source document may not be able to be perfectly preserved in the destination document.

To Flattened PDF/A (with Annotations burnt in): One of the available conversion options important in many legal or professional settings is the use of PDF/A. This is a type of PDF used for long-term document archiving and preservation. For example, contracts, land deeds, birth or death certificates, etc. would be good candidates for PDF/A. These can be used in any DEVONthink database, but would be perfect in an revision-proof database.

Thumbnails: Use these commands to add, remove, or update a thumbnail for the selected files.

MOVE TO TRASH

Move to Trash/Move All Instances to Trash: Moves the selected items to the trash. If you have selected a replicated item, hold the ⌥ Option key and choose *Move All Replicants to Trash* to move the selected item and all its replicants to the database's trash.

PRO/SERVER COMMANDS

These commands are only available in the Pro and Server editions of DEVONthink:

- **Group Similar Items:** Shown while holding the ⇧ Shift key, DEVONthink's internal AI will attempt to gather selected documents into groups based on their similarities.
- **Recognition:** Process images and media files to produce a transcript of any detected text. The output, e.g., to associated searchable text, is defined by you in the *AI > Transcription* settings. This also works with PDFs if the output is set to *Comment* or *Annotation*. *Scan Barcodes* detects barcodes in an image or PDF document and records it as *Info > Data* custom metadata, *Barcode*, on the document. You can see a list of supported barcodes here.
- **OCR:** This menu contains options for choosing an output format when doing OCR on a selected compatible document (JPEG, PNG, TIFF, PDFs with no text layer). The currently supported output formats are: *Searchable PDF*, *RTF*, *Word*, and *Web Archive*. Additionally, there are two special commands: *to Comment* and *to Annotation*, which sets the Finder comment or creates an *Annotation file* with the text. Neither command adds the text layer to the selected document.

New

- **Generate Image:** This opens the *Generate Image* panel where you can use AI to create images.
- **The Devonian Times:** Creates an HTML document with a summary of new items provided via AI.

Rating and *Label*

- **Chat Suggestion:** Examines the current document and applies a rating or color label to it.

Tags

- **Add Chat Suggestions to Documents:** Examines the selected document and applies tags relevant to its content. Specify if you only want to use existing tags in the *Files > Tags* settings.

THE FORMAT MENU

FONTS, STYLES, ALIGNMENT, RULERS

The *Format* menu contains the commands and options dealing with all aspects of text formatting. Here you'll find the standard font, alignment, and ruler commands, as well as very special DEVONthink commands.

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

Font: Access fonts, change type sizes, and copy/paste the style of selected text.

- **Show Fonts:** Opens the macOS Font panel.
- **Bigger/Smaller:** Increase or decrease the size of selected rich text by 1pt.
- **Copy Font:** Copies the font formatting of a selected piece of rich text.
- **Paste Font:** After using the previous command, applies the copied font to another selection of rich text.

Style: Control the formatting of selected rich text and also some higher-end font control like kerning and baseline shift.

- **Bold/Italic/Underline/Strike Through/ Outline:** Apply the chosen formatting to selected rich text.
- **Styles:** The *Styles* command opens the macOS styles editor. With it, you can step through all the styles used in the current document. If there's one you'd like to reuse, add them to your favorites. Use the pop-up menu to select a saved style and, if you don't need it any more, delete it. You can use saved styles from the ruler (see below).
- **Kern:** Modify the spacing between characters.
- **Ligature:** Choose whether to use conjoined characters, called ligatures, e.g., `fi`. This only works with fonts having built-in ligatures, typically classic serif fonts like Baskerville.
- **Baseline:** Shifts the selected text above or below the baseline, including sub- and superscripting.
- **Character Shape:** *Traditional Form* Dynamically shifts from Simplified to Traditional Chinese characters.

Alignment: Set the paragraph alignment: *Align Left*, *Center*, *Justify*, or *Align Right*. You can also set the *Writing Direction* for the current paragraph or selected text, if required.

Ruler: This submenu allows you to display the ruler above the preview of rich text documents. There are also two special commands:

- **Copy Ruler:** Copies the current ruler attributes (tabs stops, indents, etc.) of a selected piece of rich text.
- **Paste Ruler:** After using the previous command, applies the copied ruler attributes to another selection of rich text.

Make Plain/Rich Text: Converts a rich text document to plain text and vice versa.

HIGHLIGHTS

Highlight: In rich text documents, editable PDFs, and web archives use *Highlight* to highlight a selected piece of text just as you would using with a colored pen on a piece of paper. To remove highlighting, select the highlighted piece of text and choose *Highlight* again.

Highlight Color: Choose the desired highlight color. While highlighting, this remains the color used until you choose another.

LINKS, SPACING, LISTS, TABLES

Make/Remove Link: Converts the selected text into an active link, or disables the link. This command can be used to create WikiLinks quickly.

Add/Edit Link: Use this command if you want to add a specific link to some text. If the text is already linked, the menu will display *Edit Link*, allowing you to change or remove the URL. The behavior you'll see when clicking linked text depends on the target of the link:

- If the text was a valid URL, the URL will be the target of the link. Editing the link text later does not change the target. Use the

Edit Link command of the context menu to edit the link target.

- Otherwise, DEVONthink treats the link as a Wiki-style link. Clicking the Wiki-style link jumps to a document with exactly the same name as the linked text (or any document with a Wiki alias of that name). If there is no document of that name, clicking the link creates a new rich text document named after the linked text and pre-filled by the template you set in the *Settings > Editing*.

Spacing: This command allows you to adjust the line spacing of selected text in rich text documents. You can adjust the line height to an exact value or define a minimum and maximum height, adjust inter-line spacing, and define the space before and after a paragraph.

List: Inserts a list into a text document. Specify the *Prefix*, *Bullet/Number* style, *suffix*, and *Starting Number* as needed then click *OK*. As an example with the first three options, `Document`, `1 2 3`, and `:`, yields a list item of `Document 1:`.The *Prepend enclosing list marker* is used with nested lists and adds the prefix of the parent list to the sublist items. If the lists are using `1.`, the sublist would show `1.1.`.

Table: Inserts a new table into a rich text document and opens the table inspector panel. Use the table inspector to adjust the number of rows and columns, cell alignments, cell colors, border widths, and colors. Also, you can merge and split cells and create tables within a cell.

HYPHENATION, LAYOUT

Allow Hyphenation: Enables or disables hyphenation for the current rich text document.

Make Layout Vertical/Horizontal: Enables orienting and editing the document text vertically or horizontally.

Wrap Lines: Toggle whether to wrap a document's content to the width of the view/edit pane or document window, or let it exceed the width for sideways scrolling.

Typewriter-like Scrolling: Keeps the currently edited line in the center of the window or view/edit pane.

Wiki Linking: Toggles whether to display WikiLinks in the current document.

WYSIWYG Editing: Toggles the WYSIWYG view when editing Markdown documents.

BARS, COLORS, INVISIBLE CHARACTERS

Show Format Bar: Displays the Format Bar under the toolbar, providing access to rich text styles, font and paragraph attributes, etc.

Show Editing Bar: Displays the Editing Bar above the view/edit pane containing a suite of format-specific tools. For example, rich text formats display several common tools including highlighting, toggling the ruler, and displaying the color picker are shown. For sheets, tools to add/remove/duplicate records, as well as the column editor.

Show Colors: Shows the macOS color panel, e.g., for changing the foreground color of selected text in rich text documents.

Show Invisible Characters: Toggles display of invisible characters such as spaces, tabs, and line feeds. Shown invisible characters appear in light gray.

THE TOOLS MENU

The *Tools* menu provides tools to get more detailed information about your documents, as well as some specialized commands.

INFO & FILTERS

Get Info: Opens the *Info* popover displaying the views of the Info inspector.

Chat: Opens the *Chat* popover.

Graph: Opens the *Graph* popover which shows the *Graph* detached from a main window.

Inspectors: This submenu provides access to the various inspectors built into DEVONthink. You can also use *Show/Hide* to toggle the visibility of the Inspectors pane.

Filter: The commands in this submenu filter the list of files in the location you are currently viewing. As you select options in these panes, the list of files will change accordingly. The filters are also covered in the windows chapter.

- **Info:** Shows a pane with options for filtering on dates, flagged state, unread status, rating, or color label. When using the calendar, you can click *Any Date* to set which date you want to filter on: added, created, modified, opened, or due.
- **Tags:** Shows a tag cloud, with frequency-based sizing, i.e., more frequently used tags will be larger. Clicking on tags removes unrelated tags from the cloud, only showing tags that have been applied with the current tag.
- **Multimedia:** Displays options for filtering multimedia files - images, audio, and video - in the current location. Options for minimum and maximum pixel dimensions or durations are available.
- **Maps:** Shows a small map showing pins from geolocation data will be shown. Clicking on a pin will show you files created in that location. The behavior of this pane is similar to Apple Maps, e.g., pinch to zoom in and out, etc.

DOCUMENT COMMANDS

Annotate: This submenu provides access to the PDF and image annotation tools. Applicable to PDF documents you have: *Highlight Text*, *Underline Text*, and *Strike Through Text*. Next, the basic annotation types are available: *Oval*, *Rectangle*, *Line*, *Note*, *Text*, and *Link*. Note and link annotations aren't available with images. These tools are persistent, so you can select one and use it in that mode until you change to another tool.

Capture: This submenu provides options for capturing the current document to a new file in a few different formats: *Bookmark*, *Rich Text*, *Formatted Note*, *Markdown Text* *HTML Page*, *Web Archive*, and *PDF (One Page/Paginated)*. Captures are made to the current group. *Set as Thumbnail* will set a thumbnail for a currently viewed web page, useful to create a clean thumbnail, e.g., after dismissing cookie banners. There is also an option to use the *Clip to DEVONthink* command, just like in your browser. Also note,

the option *Clutter-Free Layout* will try to remove extraneous information before the document is captured.

> Note: The available options in the *Capture* menu are dependent on the type of the selected document.

Mode: The commands in this submenu switch between three modes of interaction in PDF documents: *Move*, *Text Selection*, and *Annotation Selection*. When viewing an image, *Move* and *Image Selection* are the available commands.

Rotate & Flip: This submenu provides a *Rotate* command for rotating an image or PDF page right or left, or by 180 degrees. You can also mirror images on their horizontal or vertical axes via the *Flip* commands.

Markdown: This menu works dynamically, with its commands changing based on the selection in a Markdown document. At the cursor location, create a new table by dragging in the grid picker, visually setting the required number of columns and rows, and the table is created for you. While the cursor is in an existing table, the commands in the menu change to modifiers. Insert, duplicate, delete, or shift rows. For columns, insert, delete, or shift them or set the column alignment. If you are editing in WYSIWYG mode, choose *Edit Source* to view the raw Markdown. For lists, create, modify, or clear a Markdown list, at the cursor location or with selected text.

PDF: This submenu provides options for modifying the structure of a PDF document: *Insert Blank Page*, *Delete Selected Page*, and *Reverse Page Order*.

Sheets: This submenu provides access to the following tools for editing a sheet: *New Record*, *Duplicate Records*, *Delete Records*, *New Column*, *Edit Columns*, and *Delete Columns*.

ITEM LINKS AND IMAGES

Item Links: For documents supporting item links and WikiLinks, there are three commands in this submenu:

- **Convert WikiLinks to Item Links:** Replaces detected WikiLinks with the appropriate item links.
- **Update Name of Item Links:** Scans the current document for item links and updates the link text for any files whose names have been changed. This only updates the names of item links.
- **Verify Item Links:** checks all item links in the document and logs those no longer pointing to a valid target, e.g., because the referenced item is no longer available in any database.

Import Online Markdown Images: Download and link to local copies of images from web content clipped as Markdown documents.

CREATE, SUMMARIZE, MERGE, SPLIT

Create Metadata Overview: Creates a sheet with records for each selected file. The columns contain data from the generic and custom metadata of each file.

Create Table of Contents: Opens a submenu to create a rich text or Markdown document with links to the currently selected documents.

Summarize Annotations: Creates a document with all annotated text passages of the currently selected documents. In case of items located in multiple databases the summary is created in the global inbox. From the submenu, choose to create the summary in a rich text document, Markdown document, or a sheet.

Summarize Mentions: Creates a new document containing a list of the documents mentioning the name or alias of the selected document. From the submenu, choose to create the summary in a rich text document or a Markdown document.

Merge Items: Merge the selected documents into one. This creates a new file, preserving the originals. Hold the ⌥ key to choose *Merge & Delete n Documents*, removing the original files after the merged document is created.

When merging documents, the order of the merge will be the order shown in the item list. The topmost selected document will be the first page with the pages beneath it following. The order of the documents can be controlled by the current sort method used in the item list. Also, the resulting file type of a *Merge* operation depends on the types of the selected files. Selecting mixed formats, e.g., a web archive and an image, usually results in an RTFD file being created.

Split PDF: Use commands in this submenu to split a PDF document into separate files. Use *into Chapters* on a PDF containing a table of contents to create separate per-chapter files. Use *into Pages* to 'explode' the PDF into individual single page files.

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

RULES

These commands allow you to set or run smart rule commands

- **Apply Rules:** Apply the selected rule on selected items that match the rule's criteria, including the location defined in the smart rule.
- **Perform Rules:** Run the selected rule at any time or in any location. This is not isolated to the documents in the current location.
- **Batch Process:** Open the *batch processing* window or run an existing configuration.

PRO/SERVER COMMANDS

These commands are only available in the Pro and Server editions of DEVONthink:

- **Chat:** Opens the *Chat* popover.
- **Imprinter:** Choose an imprint you have defined in *Settings > Imprinter* to apply it to the current image or PDF.
- **Import Email Attachments:** Parses selected emails and extracts the attachments as individual files. This is useful if you're not using the *Message Content: Import attachments* option in the *Files > Emails* settings.
- **Create Audit Report:** Creates a locked sheet with an itemized list of the properties of selected documents. This includes things like the name, original name, when the file was added, the content hash, etc.
- **Create Expense Report:** Creates a sheet summarizing custom metadata dates and

currencies of selected files. Totals for the amounts will also be included.
- **Summarize Documents via Chat:** Opens the *Summarize and Transform* popover and saves the summary in your chosen format: Markdown, rich text, as a Finder comment on the document, or an annotation file.
- **Start/Stop Server:** Use this command to start and stop the integrated web server.

Inspectors

- **Info > Data:** Opens the *Data* inspector.
- **Concordance > List/Cloud:** Opens the *Concordance* inspectors.
- **AI > Graph:** Opens the *Graph* inspector.
- **Chat:** Opens the *Chat* inspector.

THE VIEW MENU

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

SIDEBAR & LAYOUTS

Sidebar: The *Sidebar* view options allow you to switch between the four different sidebar views in a main window. You can toggle the sidebar's visibility by selecting the same option again.

- **Navigate:** Open the *Navigate* sidebar, giving you easy access to your databases, favorites, and global smart groups.
- **Reading List:** Open the *Reading List* sidebar where you can maintain a list of documents for later consideration.
- **Extras:** Open the *Extras* sidebar to read up on recent updates, announcements, and promotions or discover the latest tutorials, scripts, and templates.

View: Choose one of the following options to switch between different layouts for the item list in a main window. All these views are similar to options you find in Finder windows.

- **Icons:** Displays items as icons.
- **List:** Displays items in a list view with user-specified columns shown.
- **Columns:** Displays the item list as a set of columns.

Preview: These options allow you to control the position of the current document's preview, or dismiss it altogether.

- **None:** This creates a list only view.
- **Standard:** This shows a preview under the file listing.
- **Widescreen:** This shows the preview to the right of the file listing.

Quick Look/Slideshow: Opens the Quick Look panel for the selected items which can be useful for times when the view/edit pane isn't displayed. Holding the ⌥ Option key allows you to display the selected files in a Quick Look slideshow.

SHOW TAGS & DETAILS

Show/Hide Tags: Shows or hides the Tags bar.

Show/Hide Details: Switches between displaying icons only or displaying icons together with detailed information such as kind, label, size, word count, creation date, and modification date. Available in all windows using icon or column views.

Show Only Documents: When checked, this hides groups and smart groups in *List* and *Icons* views. Note this is a per-database setting, i.e., you can enable or disable it for each open database.

COLUMNS & SORTING

List Columns: This submenu lists all columns available to be displayed as column headers in the item list.

Sort: This submenu lists all the attributes that can be used to sort the current item list. Choose *Unsorted* to manually sort the items. DEVONthink remembers sort settings for every group separately and uses those settings when the group is displayed in its own main window

Customize Metadata: Opens a panel showing all the available metadata fields that can be enabled as List view columns or used to sort on. This includes all enabled custom metadata.

FULLSCREEN & ZOOM

Full Screen: Displays either the current document in a full screen mode optimized for reading and editing, or the frontmost window in full screen. There are two options available here:

- **Document:** Shows the current document in full screen. Note this is a distraction-free view, not the standard macOS fullscreen view.
- **Window:** Shows the current window in a standard macOS full screen view.

Zoom: Depending on the document type, you can zoom in or out of the document's preview:

- **Actual Size:** Displays the document at actual size, calculated using the resolution of the screen and the resolution information of the image or PDF.
- **All Pixels:** Displays the document at a 1:1 ratio so that one pixel of the image equals one pixel on the screen (PDFs and images only).
- **Zoom In/Out:** Zooms in or out of the document.
- **Zoom to Fit:** Displays the document so that it exactly fits either the height or the width of the window/preview pane (PDFs and images only).
- **Zoom to Width:** Displays the document so that its width fits the width of the window or view/edit pane (PDFs and images only).

DOCUMENT & PDF OPTIONS

Document Display: This submenu contains commands for displaying alternate views of some documents. Note there are alternate commands shown when used with sheets or HTML and Markdown files.

- **Best Alternative/Preview/Table View:** Shows a QuickLook view, or a rendered view for HTML-based and Markdown files, the Table view for sheets.
- **Text Alternative/Source/Form View:** Shows a text-only view of some file types, e.g., Word or email. Also shows the page source of HTML-based and Markdown files or the Form view for sheets.
- **Side-by-Side:** Shows a side-by-side view of the rendered view and source for HTML

and Markdown files. Note this does not apply to Formatted Notes.

PDF Display: This submenu lets you adjust the way PDF documents are displayed:

- **Single Page, Two Pages:** Shows a multi-page document as single pages or two pages facing each other (as in a magazine).
- **Continuous Scroll:** When checked, shows the pages of the PDF as one long scroll. When unchecked, only one page is shown at a time.
- **Book Mode:** When checked, facing pages start with one single page (the title page), then facing pages. When unchecked, they start facing.
- **Page Breaks:** When checked, pages are shown with a small break between the pages. When unchecked, the pages appear as a continuous document.
- **Crop Box, Media Box:** Crops the page to the crop or media box. By default, PDF pages are cropped to the crop box.

TOOLBAR

Hide/Show Toolbar: Hides or shows the toolbar of the frontmost window.

Customize Toolbar: Opens the toolbar configuration sheet so you can change the toolbar buttons of the frontmost window.

PRO/SERVER COMMANDS

These commands are only available in the Pro and Server editions of DEVONthink:

- **Import:** The *Import* sidebar gives you access to scanning and email archiving.

THE WINDOW MENU

Just like most every macOS application, the *Window* menu lists all open windows of the active application and gives you access to commands for managing them.

> Note: Some commands in this menu may be under the control of the operating system. For example, *Move to iPad X* is created and handled by macOS. Also, some commands may be present only in more recent versions of the operating system. These commands are not documented here.

WINDOWS & TABS

Close/Close All: Close the current window or all of them.

Zoom: Maximize the current window without entering fullscreen. Hold the ⌥ Option key to maximize all open windows.

Tile Window to Left/Right Side of Screen: Enter Split View and tile the current window to the chosen side. Hold the ⌥ Option key to move the window instead. With the affected window active, holding the ⌥ Option key will allow you to choose *Revert*.

Minimize: Minimize the current window to the dock. Hold the ⌥ Option key to minimize all open windows.

New Tab: Create a new tab in the current window, whether main or document windows.

Close Tab: Close the current tab in the active window.

Select Next/Previous Tab: Switch to subsequent or preceding tabs in the current window.

ACTIVITY, DOWNLOADS, LOG

Activity: Opens the *Activity* window to monitor the progress of processes, e.g., sync activity.

Log: Opens the *Log* window to view messages, warnings, and errors.

Bring All to Front: Gather any background windows with the front most one. Hold the ⌥ Option key to restore any windows minimized to the dock and tile all windows in the middle of the screen.

OPEN WINDOWS

Select any open window from the menu to bring it to the front. The current window is marked with a check mark; minimized windows with a diamond.

PRO/SERVER COMMANDS

These commands are only available in the Pro and Server editions of DEVONthink:

- **Download Manager:** Opens the *Download Manager* window to add or monitor downloading online assets.

THE GO MENU

For people who prefer to use the keyboard for navigation, the *Go* menu contains all commands for navigating the hierarchy of your DEVONthink database, all with keyboard shortcuts. Use these commands to go backwards and forwards through your documents, or to move back to the top level of the group hierarchy.

DATABASES

Previous Database: Selects the previous database in the Navigate sidebar.

Next Database: Selects the next database in the *Navigate* sidebar.

GROUPS

Top Group: Returns you to the top level of the database (also known as the "root").

Enclosing Group: Changes the view to the parent folder of the current group or document.

Selected Group: Changes the view to the currently selected group.

To Group…: After classifying or moving documents to a new location, use this command to quickly jump to the last used destination.

DOCUMENTS

First/Previous/Next/Last Document: Navigates to the first, previous, next, or last document of all documents in the current group. This is useful when you have opened a document in a separate window and want to move to another document in the same group.

To Group: Opens the *Go to Group* popover to jump to another location in your databases.

To Document: Opens *Go to Document* popover to quickly navigate to a specific document.

To Line/Page/Time: Allows you to jump to: a line in text-based documents, a page in PDF documents, or a time in video and audio files.

To Link: Opens a link directly following the cursor in plain text, rich text, and Markdown documents.

Back/Forward: Moves backwards and forwards through all documents/web pages you have visited by following cross-links or Wiki-style links.

Previous/Next Instance: Navigates backwards and forwards through all instances of a replicated document. Use these commands to find out where the other instances of a replicated item are.

Previous/Next Highlight: Navigates backwards and forward through highlighted passages in rich text or Markdown documents or search hits in the *Search* inspector.

Next Unread Item: Navigates to the next item with an unread status in the current database.

Complete News: Loads the article linked to in an RSS article.

MOVE FOCUS

The following commands allow you to quickly jump between the panes in a window, e.g., from the view/edit pane to the current inspector. The options available are dependent on the visible UI elements, e.g., if the inspectors aren't visible, the *Move Focus to Inspector* command will be disabled.

- **Move Focus to Sidebar:** The current sidebar, e.g., the Navigate sidebar will have focus. Note this command requires *Keyboard Navigation* to be enabled in the *General > Interface* settings.
- **Move Focus to View:** The item list will have focus.
- **Move Focus to Preview:** The view/edit pane will have focus.
- **Move Focus to Inspector:** The current inspector will have focus.

Favorites: Displays a submenu of items in the *Favorites* section of the Navigate sidebar.

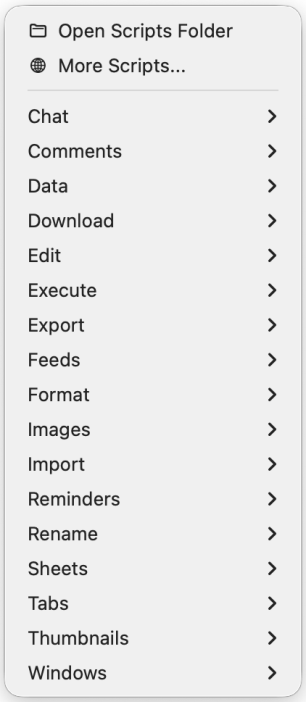
WORKSPACES

Workspaces: Workspaces allow you to save the state of your open databases, as well as the contents and positions of all open windows, so that you can restore them later. This is ideal if you are working with the same set of windows over and over again. Save these windows as a workspace and recall them whenever you need them again. From the Workspaces submenu you can:

- **Add:** Saves the currently open windows and open databases as a workspace.
- **Edit:** Opens a window that allows you to edit saved workspaces. Click on a workspace name to change it, reorder by dragging, and delete with the - button.
- **Update:** Updates an existing workspace to the current state of databases and windows.
- **Choose:** Choose a workspace from the list of saved workspaces to load it.

THE SCRIPTS MENU

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

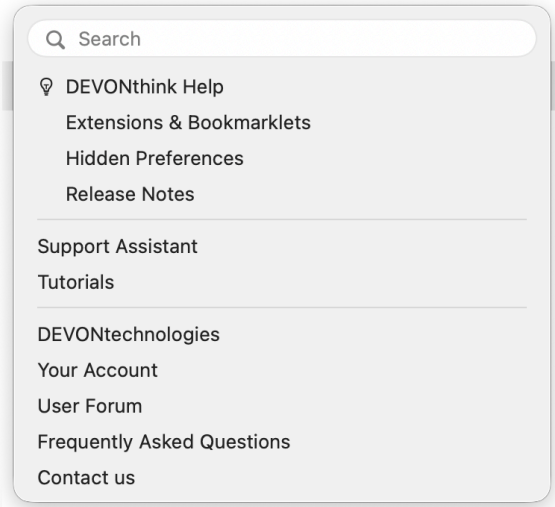


Some of the scripts work without having selected a document, while others require you to select the document you want the script to interact with. In general, the script will tell you what you have to do when you run it.

We also occasionally provide optional scripts for a variety of purposes. Select *More Scripts* to open the Support Assistant and install the ones you like. You can read more about the pre-installed scripts scripts in the appendix. If you're interested in scripting, check out the Automation chapter.

THE HELP MENU

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



DEVONTHINK

Use these commands to open the integrated help pages, get directions on installing the browser extension and bookmarklets, or access the list of changes to DEVONthink.

- **DEVONthink Help:** Opens the internal documentation.
- **Extensions & Bookmarklets:** Opens the *section* in the help with information about our browser extension and bookmarklets.
- **Hidden Preferences:** Opens the documentation to the section about hidden preferences.
- **Release Notes:** Opens the What's New section of the documentation so you can see what's new, improved, fixed, or removed in each release.

SUPPORT

Support Assistant: Opens the support screen of the *Welcome to DEVONthink* assistant with more direct links to the DEVONtechnologies website, tips, and tutorials. Note this function requires an Internet connection.

Tutorials: Opens the *Tips and Tutorials* screen of the *Welcome to DEVONthink* assistant. The tutorials help get you started by explaining everyday DEVONthink tasks in step-by-step detail. Note this function requires an Internet connection.

CONTACT

These commands take you directly to the corresponding pages on our website or send feedback directly us.

DEVONtechnologies: Quickly access our home page.

Your Account: Opens the login page for your DEVONtechnologies account where you can get information on your licenses and the devices they're registered to.

User Forum: Jump into our user forum.

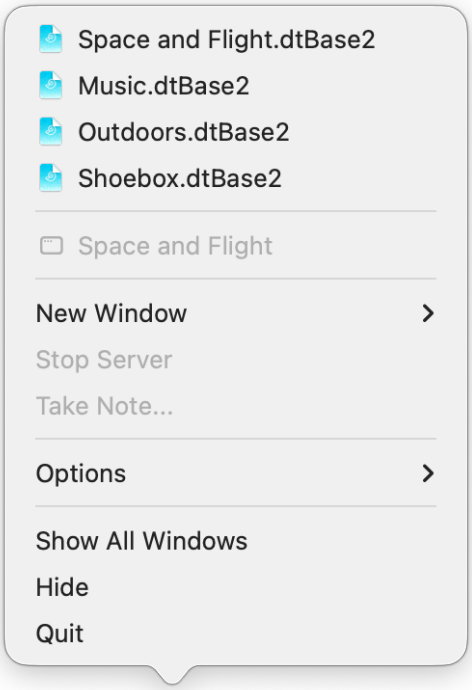
Frequently Asked Questions: Choose this option to access many often asked questions in the Questions & Answers section of our website, pre-filtered for questions about DEVONthink.

Contact Us/Report Bug: Use this to draft a general email to us. When you need to report an issue, hold the ⌥ Option key to show the *Report Bug*. This creates a new message in your default email client or Apple Mail containing the console log and all related crash logs in a ZIP archive, ready to be sent to our customer support.

THE DOCK MENU

The *Dock menu* appears when you Control-click *DEVONthink's icon* in the *Dock* or left-click it and hold the mouse button for one second or longer. When items are added to a database, *a badge* appears on this icon. Longer tasks, e.g., importing, indexing, or running scripts, may show a progress indicator on the dock icon.

It also contains the generic macOS commands and an *Options* menu common to all macOS applications. DEVONthink-specific items are listed below:



Recent Databases: Quickly reopen a closed database from this list.

Open Windows: Switch to any open window from this list. The active window is displayed with a checkmark next to it.

New Window: Open the selected database in a new main window.

Take Note: Opens the Take Note panel.

Start/Stop Server: Starts or stops the web server.

SETTINGS

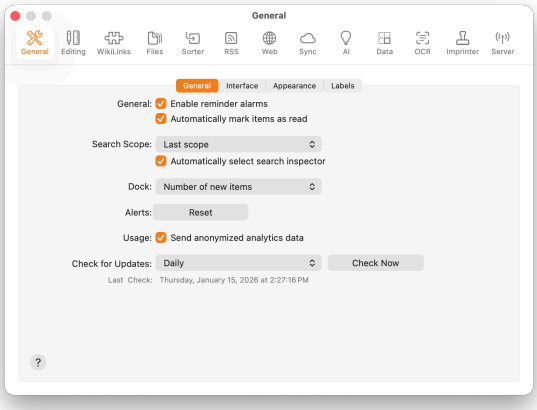
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The Settings window, accessed via the *Settings* command in the *application menu*, is where you find and change the global settings for DEVONthink. There are a wide variety of options available, from setting the default font for new rich text documents to how often RSS feeds should update or setting up syncing your database. Now you can fine-tune many aspects of the operations and customize your experience.

GENERAL

GENERAL



Use the *General* tabs to set application/interface appearance and behaviors as well as defining label colors and names.

General:

- **Enable reminder alarms:** Enable or disable using alarms with DEVONthink Reminders.
- **Automatically mark items as read:** Enable this option to mark viewed item as read, similar to applications like Apple Mail. Disable this option if you prefer to manually mark items as read.

Search Scope: Control the behavior of toolbar searches, e.g., where to search and coordination with the *Search* inspector.

- **Scope Location:** Choose where to begin the search: *Last scope*, *Current Database*, *All Databases*, and *Current Selection*.
- **Automatically select search inspector:** Switches to the *Search* inspector if the

view/edit and *inspectors* are already visible during a search.

Dock: DEVONthink's dock icon will show a number in a red circle. Choose what this number represents to you: *new items*, *unread items*, or *unread news*.

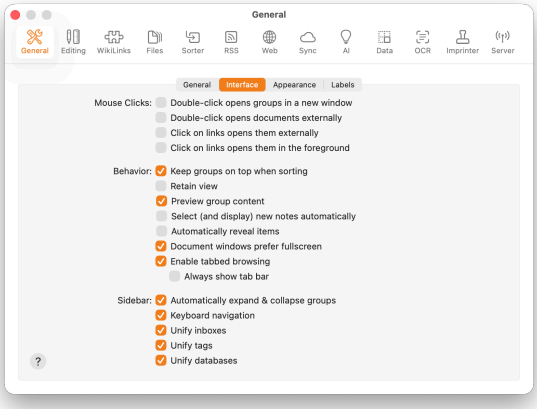
Usage: Enable this to send anonymized usage data.

Alerts: Press the *Reset* button to again display alerts previously dismissed with the "Don't show again" option in dialogs.

Send anonymized analytics data: Sends anonymous information about certain activities in DEVONthink, e.g, a key denoting an optional script you installed. See our company's Privacy page for more information on the data that may be sent.

Check for Updates: Choose how often you want DEVONthink to check if a new update is available or press *Check Now* to manually check for an update.

INTERFACE



These options influence interface behaviors for displaying and opening documents, settings for the *item list*, and controls for the *Navigate* sidebar.

Mouse Clicks: Control how groups, links, and documents are handled when double-clicked.

- **Double-click opens groups in a new window:** Open a new window for a double-clicked group. If unchecked, the group becomes the current location in the item list.
- **Double-click opens documents externally:** Open double-clicked documents externally in the system default application, e.g., TextEdit for RTF documents. If disabled, they will be opened and displayed in a separate document window. If you hold the ⌘ Command key, the document will open in the opposite way of this setting.
- **Click on links opens them externally:** Open URLs in document text with the system default application. Use ⇧-click to open and activate the default application. Note ⌘ or ⌥-clicks can be still used to open links in new tabs or to add them to the *Download Manager*, respectively.

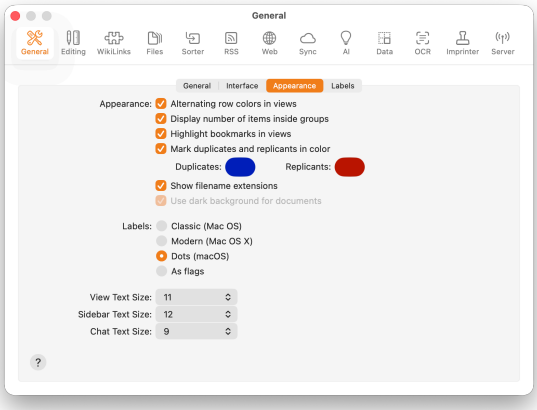
Behavior: Control the view of the item list and its interactions with the view/edit pane.

- **Keep groups on top when sorting:** Always display groups at the top of the item list, independent of the sort method, e.g., by Date Added.
- **Retain view:** Keep the current view settings in a main window, e.g., *Icons* in *Widescreen*, when switching to other databases. If you change the view, e.g, from *Icons* to *Column* view, that change is retained when switching. A database's original view settings will be restored after disabling this option.
- **Preview group content:** Display documents contained in a selected group via the view/edit pane.
- **Select (and display) new notes automatically:** Always make newly added documents the active document.
- **Automatically reveal items:** Always reveal the active document's location in the item list, for example when switching between document tabs in a main window.
- **Document windows prefer fullscreen:** Open document windows in fullscreen when opened from another fullscreen DEVONthink window.
- **Enable tabbed browsing:** Display documents in tabs instead of document windows. Check *Always show tab bar* if you'd like to view the document title in a tab bar even when only one document is open.

Sidebar: Control the Navigate sidebar.

- **Automatically expand & collapse groups:** Automatically expand databases in the Navigate sidebar and select the group for the active location in the item list.
- **Keyboard Navigation:** Enable keyboard navigation with type-ahead, and arrow key hoisting of groups in the Navigate sidebar.
- **Unify inboxes:** Gather the inboxes of open databases in the *Globals* section of the Navigate sidebar. When disabled, each inbox will be displayed in the root of its database.
- **Unify tags:** Gather the Tags group of all open databases in the *Globals* section of the Navigate sidebar. When disabled, each Tags group will be displayed in the root of its database.
- **Unify Databases:** Display each open database and its groups in the *Open Databases* section of the Navigate sidebar. When disabled, only the root of the open databases are displayed while the groups of the active database are shown in the section below bearing the database's name.

APPEARANCE



Appearance: Change the appearance of some of the interface elements, including the item list, the sidebars, and some of the inspectors.

- **Alternating row colors in views:** Color every other row in the item list.
- **Display number of items inside groups:** Show the number of items in each group, tag, or RSS feed.
- **Highlight bookmarks in views:** Display bookmarks in the item list as hyperlinks, in blue and underlined.
- **Mark duplicates and replicants in color:** Display duplicated and replicated items in your specified colors. When disabled, these instead display a property icon to the right of a document's name.
- **Show filename extensions:** Display a file type's extension at the end of its name in the item list, e.g, `devonthink manual.pdf`.
- **Use dark background for documents:** Display compatible documents, e.g., rich text, with the color scheme reversed when your system is using macOS' dark mode. When disabled, documents will display normally regardless of the system's mode.

Labels: Choose the appearance of color labels in the item list and *Navigate* sidebar. The supported options are:

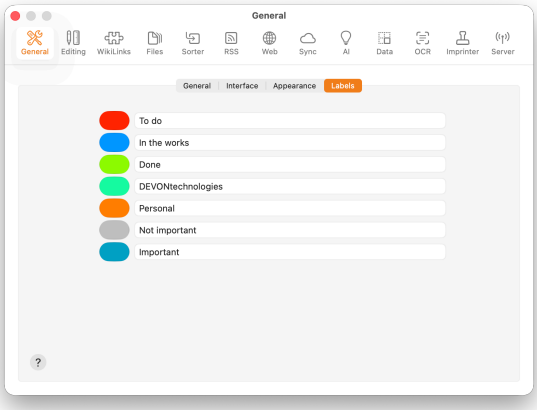
- **Classic:** Tints the item's icon (like on Mac OS 9).
- **Modern:** Displays the item's name in a colored bubble (like on older versions of OS X).
- **Dots:** Shows a colored bubble to the right the item's name (like on macOS).
- **As flags:** Displays a colored bubble in the *Flag* column of the item list or to the left of an item's name. In the Navigate sidebar, the bubble appears to the right like the *Dots* option.

Interface Font Size: To accommodate those with impaired vision or wanting a larger size font in some parts of the interface, the sidebars, and some of the inspectors, there are three font controls:

- **View Text Size:** Set the size for the text in the item list, the contents of sheets in table view, and the *Annotations* and *Attachments* tabs of the *Document* inspector. Supports from 10 to 24pt.
- **Sidebar Text Size:** Set the font size DEVONthink used in the sidebars. Supports from 10 to 24pt.
- **Chat Text Size:** Set the font size in various AI-directed elements, e.g., the *Chat inspector* or the *Summarize popover*. Supports from 8 to 15pt.

> Note: Currently, there are no controls for changing the font in the interface. However, there are two hidden preferences to switch to a monospaced font.

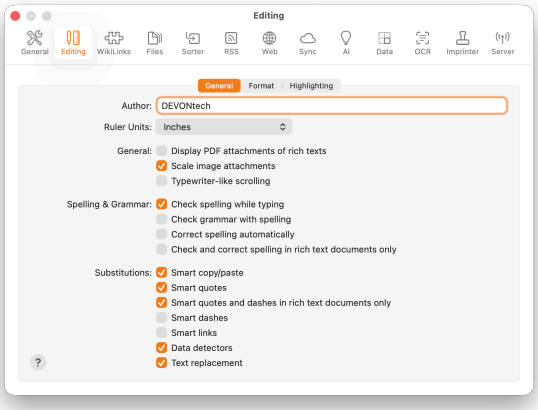
LABELS



Label: Set the name and color for color labels you can apply to the files and groups in your databases. Be aware these are global settings, i.e., you can't have different labels

for different databases. Also, following Apple's example, we only allow setting seven color labels.

EDITING



The Editing tabs define all options that fine tune DEVONthink's text editing behavior. Everything from default fonts to text and highlight colors as well as margins and automatic text transformations, like smart quotes.

GENERAL

Author: Enter the default name to be used for metadata, placeholders, etc.

Ruler Units: Set the units used for the *Format > Ruler* when editing rich text. Choose from: *Centimeters*, *Inches*, *Points*, or *Picas*.

Rich Text Attachments: Control the behavior of PDF and image attachments in rich text-based formats.

- **Display PDF attachments of rich texts:** Display a scrollable preview of an attached PDF in RTFD documents. When disabled, it will display the PDF's icon, filename, and the size.
- **Scale image attachments:** Visually scale large images to the width of the *view/edit* pane when attached to rich text documents and formatted notes. This does not effect the actual dimensions of the attached image.
- **Typewriter-like scrolling:** Keeps the currently edited line in the center of the window or view/edit pane.

Spelling & Grammar:

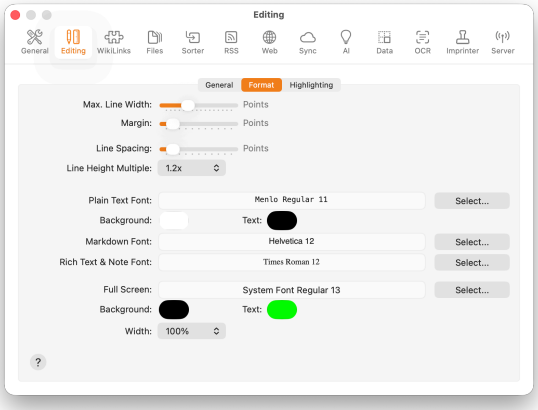
- **Check spelling while typing:** Spellcheck while you write.
- **Check grammar with spelling:** Check grammar as well as spelling while you write.
- **Correct spelling automatically:** Correct misspelled words automatically.
- **Check and correct spelling in rich text documents only:** Limit spellcheck and correction to rich text formats, including web-based formats like formatted notes.

Substitutions:

- **Smart copy/paste:** Insert or remove spaces before and after cut or pasted text.
- **Smart quotes:** Convert straight quotes ("inch marks") to typographer's quotes ("curly quotes") while you type.
- **Smart dashes:** Convert characters, e.g., two hyphens into a proper dash.
- **Smart quotes and dashes in rich text documents only:** Limit converting quotes and dashes to rich text formats, including web-based formats like formatted notes.
- **Smart links:** Detect web addresses and turn them into clickable links.
- **Data detectors:** Detect dates, times or addresses in text, and show possible

actions when the mouse cursor moves over them.
- **Text replacement:** Use the system-wide text replacements when editing text.

FORMAT



Define the visual settings for plain text formats, including Markdown source, and rich text formats, including formatted notes.

Plain Text: Choose the *Plain Text Font*, as well as the *Background* and *Text* colors. If you have a plain text document selected, the font and colors will dynamically update as you make changes. There are also two settings for controlling the width of the content:

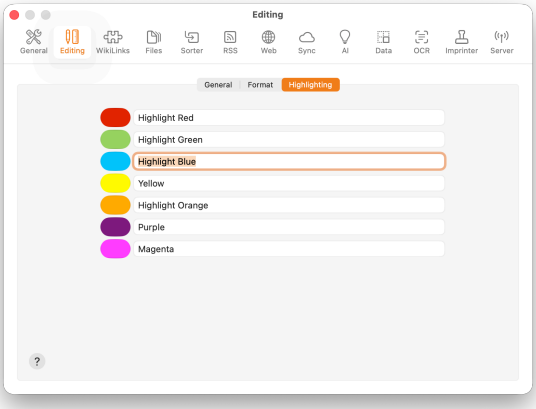
- **Max. Line Width:** Set the maximum width of the contents (in points).
- **Margin:** Set the document margins (in points).
- **Line Spacing:** Choose the spacing between lines of text in points.
- **Line Height Multiple:** Adjust the spacing between lines as a multiple of the line's height.

Rich Text & Note Font: Set the default font for newly created rich text-based documents. Changes do not apply to existing documents.

To change existing documents, use the commands in the *Format* menu while editing specific documents.

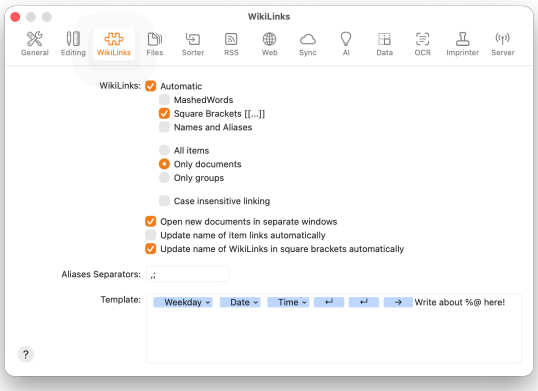
Full Screen: Choose the *Text* and *Background* colors to be used when editing a document in DEVONthink's *fullscreen* mode. These settings will override the colors in non web-based documents. The *Width* is a percentage of the screen's width, defining the width of the content in fullscreen view.

HIGHLIGHTING



Set the name and color for highlighting text in compatible file formats, like PDFs. Changing the colors will not change the highlight colors already applied in existing documents. Also, be aware these are global settings, so you can't have different highlight names and colors for each database.

WIKILINKS



Toggle using WikiLinks, choose the link detection method, what items can be linked to, and if link names should update when edited. Also, define template text to pre-populate newly created WikiLinked documents.

WikiLink Controls: To enable WikiLinking, check the *Automatic* checkbox and choose from the options shown here:

- **MashedWords:** Commonly used to avoid creating links from individual words, detect concatenated capitalized words, e.g, `DatabaseSecrets`.
- **Square Brackets:** Detect or use words in double square brackets, e.g., `[[Barcelona]]`.
- **Names and Aliases:** Matches documents based on the name or any aliases defined in the Generic Info inspector.
- **All Items/Only Documents/Only Groups:** Choose whether to match only documents, groups, or both.
- **Case-insensitive Linking:** Ignore capitalization when detecting or using WikiLinks. When enabled, `Global Economy` and `global economy` both would match.
- **Open new documents in separate windows:** Openly newly created WikiLinked documents in a new document window.
- **Update name of item links automatically:** Update the link text in documents containing item links when the name of the linked documents change.
- **Update name of WikiLinks in square brackets automatically:** Update the square bracketed link text in documents when the name of WikiLinked documents change.

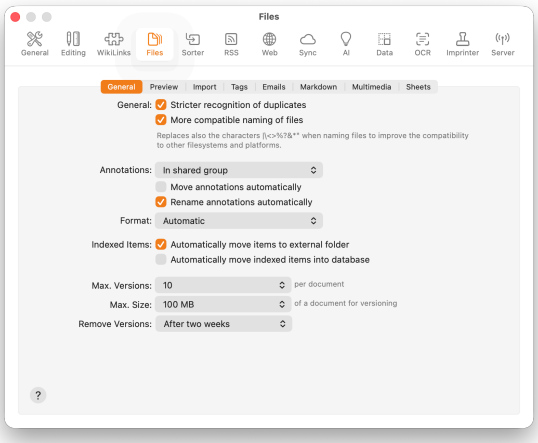
Aliases Separators: Set the delimiting character that separates multiple aliases applied to a document. The default is semicolon (;).

Template: Define template text used as the content of a newly created WikiLinked document. Add text and Control-click to use *Insert Placeholder* to insert a token that will be automatically replaced when the template is created. The default title contains several of these tokens already. Check out the placeholders section of the appendix for information on the available choices.

For more information on creating WikiLinks and other linking methods, see the Document Linking section.

FILES

The *Files* settings contains controls for a variety of things from imports to media playback, thumbnailing to Markdown extensions, and much more.



GENERAL

The *General* settings control some miscellaneous options, including filenaming, the behavior of annotation and indexed files, and versioning.

General: Control duplicate detection and filesystem naming.

- **Stricter recognition of duplicates:** Check to have DEVONthink use document contents, file type, file size, and the content hash of the document, when detecting duplicate files.
- **More compatible naming of files:** Replaces the characters `|<>%?&*"` when naming files to improve the compatibility with other filesystems and platforms, e.g., Dropbox or OneDrive. Forward slashes and colons are always replaced as these are reserved by macOS.

Annotations: Control where to save annotation files, if they follow when the referred file is moved to another database, and what file format they should be.

- **Location:** Choose where to save newly created annotation files: *In shared group* or *In same group*. The shared group is an *Annotations* group in the root of the current database.
- **Move annotations automatically:** Move annotation files along with their referred files when moved between databases.
- **Rename annotations automatically:** Changes the name of an annotation file and the backlink's text in its contents when the backlinked document's name changes.
- **Format:** Choose the format for newly created annotation files: *Markdown*, *Rich Text*, or select *Automatic* to use the same format as the referring file.

Indexed Items: Control the behavior when mixing indexed and imported items in indexed and non-indexed locations in your databases.

- **Automatically move items to external folder:** Force imported or created items to be moved to the Finder folder when placed into an indexed group.
- **Automatically move indexed items into database:** Indexed items moved to a non-indexed location in your database will be moved into the database. This removes the item from the Finder location.

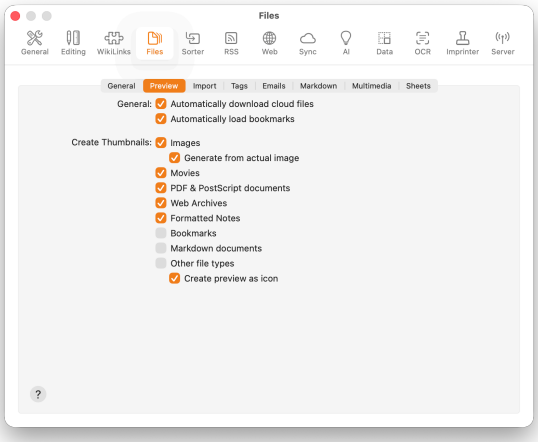
Versioning: Control the number, maximum size, and retention of document *versions*.

- **Max. Versions:** Set the maximum number of versions per-document from: *5*, *10*, *15*, *20*, *30*, *50*, or retain them all with *Unlimited*.
- **Max. Size:** Define how large an individual version can be, either: *1MB*, *2MB*, *5MB*,

10MB, *20MB*, *50MB*, *100MB*, *200MB*, or set no boundary with *Unlimited*.

- **Remove Versions:** Choose when versions should be automatically purged: *After one day*, *After one week*, *After two weeks*, *After one month*, *After two months*, *After one year*, or keep them forever with *Unlimited*.

PREVIEW



Control automatic loading of online data, including indexed files stored online, as well as what types of files should have thumbnails created.

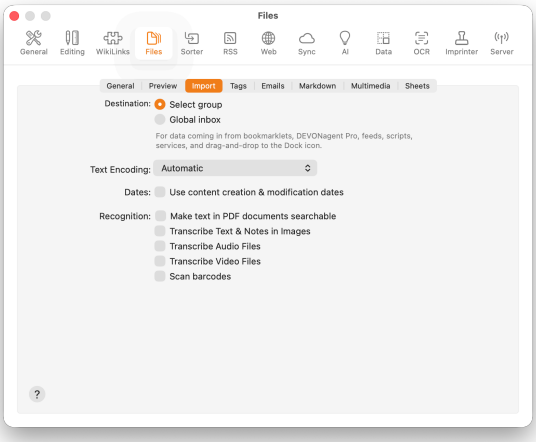
General: Control accessing online data, including indexed documents stored online..

- **Automatically download cloud files:** Download the content of indexed files whose contents are only stored online when previewing them.
- **Automatically load bookmarks:** Load bookmarks when viewing using the built-in web browsing functions. Disable this to avoid loading problematic pages, e.g., poor JavaScript, etc. When disabled, click the *Load Preview* button in the *view/edit* pane to load it.

Create Thumbnails: Choose the file types for which DEVONthink should create thumbnails or icons.

- **Generate from actual image:** Create thumbnails from image data, not an existing thumbnail.
- **File Types:** Choose the general file types that should have custom thumbnails: *Images*, *Movies*, *PDF & Postscript documents*, *Web Archives*, *Formatted Notes*, *Bookmarks*, *Markdown documents*, and *Other file types* viewable via QuickLook.
- **Create preview as icon:** Applicable to *Other file types*, the thumbnail is added as an icon visible in the Finder.

IMPORT



Choose the default import option for items added from external sources, e.g., drag and drop, dock icon drops, etc. Control the text encoding of certain file types and whether to use creation and modification dates from a document's contents. And lastly, decide whether to automatically transcribe text or detect barcodes from added documents.

Destination: Choose how DEVONthink decides where to file externally added items.

- **Select group:** Display the group selector to choose a specific destination group.
- **Global inbox:** Automatically store the added items in the Global Inbox.

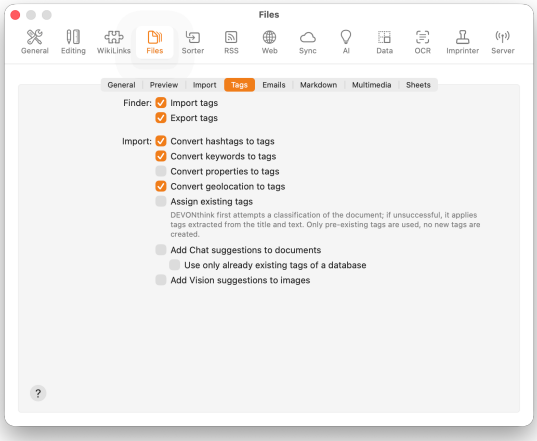
Text Encoding: Choose the default encoding used for plain text documents. Select *Automatic* to let DEVONthink choose the best encoding.

Use content creation & modificate dates: Choose whether to use the filesystem dates or dates detected in the content of a document, e.g., a PDF.

Recognition: DEVONthink can use AI to detect and save the content from certain kinds of files automatically upon being added to your database. Enable the options you wish to use. For images and media files, the AI provider and default output format are chosen in the *AI > Transcription* settings.

- **Make text in PDF documents searchable:** When enabled, PDFs without a text layer are automatically processed via the Vision framework. This is not doing traditional OCR so no text layer is added to the document.
- **Transcribe Text & Notes in Images:** AI processes images and extracts text from it.
- **Transcribe Audio/Video Files:** Detect and transcribe from audio or video files.
- **Scan barcodes:** Detect barcodes in PDF documents and images. If a barcode is detected, the value will be added to the document's *Barcode* custom metadata in the *Data* inspector.

TAGS



Decide how Finder tags are handled and what types of automatic tagging you require.

Finder: Choose whether to import Finder tags when adding files or export to Finder tags when tagging indexed files or exporting from DEVONthink.

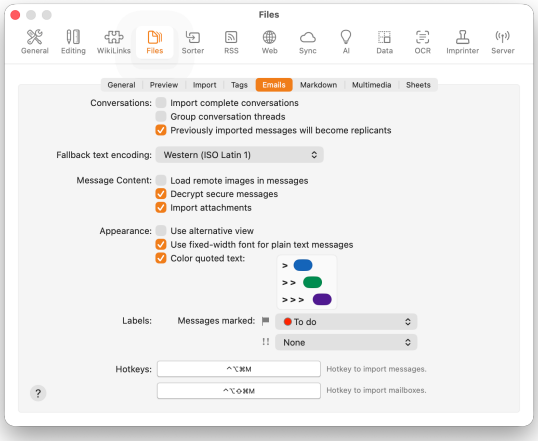
Import: Decide which automatic tagging options are appropriate for your situation.

- **Convert Hashtags to tags:** Convert document hashtags, e.g., `#DEVONtech`, to tags.
- **Convert keywords to tags:** Convert embedded keywords from PDF documents, RTF(D) files, and images to tags.
- **Convert properties to tags:** Convert embedded properties from PDF documents, RTF(D) files, and media files to tags.
- **Convert geolocation to tags:** Convert a document's geolocation names to tags, e.g., "Orlando", "FL", and "United States".
- **Assign existing tags:** Automatically tag a document based on the tags of similar documents or use the document's title and text.

- **Add Chat suggestions to documents:** Use AI to analyze and add tags to a document and choose whether they should be limited to existing tags.
- **Add Vision suggestions to images:** Add tags suggested by Apple's Vision ("Live Text") framework to a document.

Read more about tagging in the Tagging section.

EMAILS



Use these options to define how email is imported and displayed inside DEVONthink.

Conversation: Decide if DEVONthink should attempt email threading, grouping, and how to handle copies of already imported emails.

- **Import complete conversations:** Let DEVONthink scan the *Sent* mailboxes and include emails belonging to the same conversation.
- **Group conversation threads:** Combine emails in a conversation thread into their own group. This makes identifying conversations easier and automatically adds structure to the imported messages.
- **Previously imported will become replicants:** Import copies of emails as replicants when they've been previously imported, otherwise skip them.

> Note: Due to a lack of emails standards and decades of legacy emails, email threading is not a guaranteed process.

Fallback text encoding: Specify the text encoding to use for emails with no detectable encoding.

Message Content: Control loading remote images, decrypting emails, and whether to import attachments.

- **Load remote images in messages:** Load images when viewing emails in *Text Alternative* view. For more secure email viewing, this is disabled by default.
- **Decrypt secure messages:** Decrypt secure emails before importing. These emails will be stored in their decrypted state, accessible by search, potentially including Spotlight.
- **Import attachments:** Include attachments when importing emails.

Appearance: Set some basic controls for how emails display in DEVONthink.

- **Use alternative view:** Set the default view of emails to Text Alternative view. Otherwise, they will be viewed via QuickLook (Best Alternative).
- **Use fixed-width font for plain text messages:** Display plain text messages using a fixed-width font such as Courier in Text Alternative view. This is useful if

the messages contain tables or footers formatted with spaces.

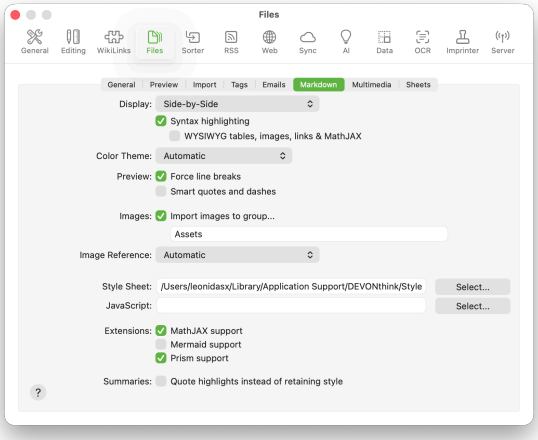
- **Color quoted text:** Display quoted text in color when viewed in Text Alternative view. Assign colors for each level of quoting by clicking the color wells.

Labels: Assign a color label corresponding to a flag or high priority on emails. As items can only have one color label, flags take precedence over priority.

Hotkeys: Specify hotkeys to import selected emails or mailboxes while in a compatible email application, e.g., Apple Mail. You can use the hotkeys previously used with our late Apple Mail plugin: ^⌥⌘M for importing messages, ^⌥⇧⌘M for importing mailboxes.

Read more about archiving email...

MARKDOWN



Choose options for the default mode when selecting Markdown files, styling, or any extensions to be used when rendering the Markdown.

Markdown Display: Specify a default view, whether DEVONthink should display formatting and images when editing, and if new lines should be assumed.

- **View:** Set the default display mode when viewing a Markdown document: *Edit Documents*, *Preview Documents*, *Side-by-Side*, or retain the previous view with *Last Used Display*.
- **Syntax highlighting:** Toggle the display of formatting and detected elements in the source code of a Markdown document.
- **WYSIWYG tables, images, links & MathJax:** Displays tables, the actual images, live hyperlinks, and equations in the source code instead of raw Markdown, e.g., `![](/img/piglet.jpg)`.
- **Color Theme:** Choose a color scheme for the rendered view. If syntax highlighting is enabled, the theme applies to the source code too. When set to *Automatic*, the *Markdown Font*, *Background*, and *Text* colors from the *Editing > Format* settings are used.
- **Force line breaks:** Enable this to treat a return as the end of a item without having to add two spaces explicitly at the end of the line.
- **Smart quotes and dashes:** Automatically convert straight quotes to typographer's quotes and two or three dashes to en- and em-dashes, respectively.

Import images to group: Specify a group to contain linked images, whether they're dragged and dropped, copied and pasted from outside DEVONthink, or from web content clipped as Markdown. See the Documents > Markdown > Linking Images section for more information.

Image Reference: Specify the type of link to be used with images pasted, dropped, or downloaded for Markdown documents.

- **Item Link:** Always link images via an item link.
- **Automatic:** Images will be linked with either item links or relative links, depending on the location of the image in the database.

Style Sheet: Choose a default global stylesheet to style your Markdown documents, if desired. Supports online URLs, item links to stylesheets in your database, or click the *Select* button to access stylesheets stored on your machine, e.g., in `~/Library/Application Support/DEVONthink/StyleSheets`.

JavaScript: Choose a default JavaScript file to be loaded with all your Markdown documents, if required. The JavaScript can be located anywhere, including an online script, if needed.

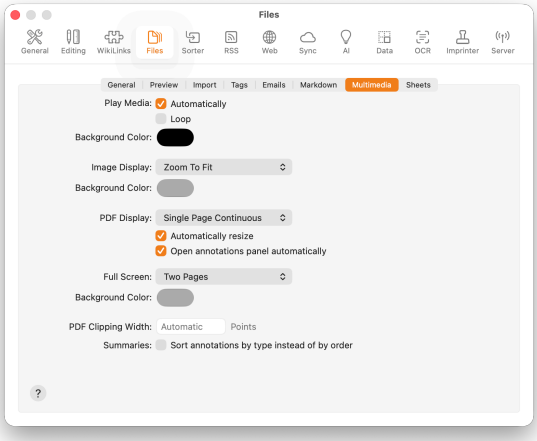
Extensions: Check the desired extensions you want to use in your Markdown documents:

- **MathJax support:** Supports rendering mathematical equations via the MathJax extension.
- **Mermaid support:** Supports rendering diagrams via the Mermaid extension.
- **Prism support:** Supports syntax coloring of rendered inline code and code blocks via the Prism extension.

Summaries: Use Markdown blockquotes instead of highlights when creating summary documents in Markdown via *Tools > Summarize Annotations*.

Read more about working with Markdown documents…

MULTIMEDIA



Choose options for media playback, display modes and magnification for PDF documents and images, the default width of clipped PDF documents, and annotation sorting in summaries.

Play Media: Play audio and video files *Automatically* when viewing them, if they should play on repeat via *Loop*, and their *Background Color*.

Image Display: Set the default magnification and background color for viewed images: *Actual Size*, *All Pixels*, *Zoom to Fit*, and *Zoom to Width*.

PDF Display: Choose how PDF documents are displayed in windowed and fullscreen modes, including the *Background Color*. Use *Automatically resize* to change the magnification when you view a document. Note there is a correlation between the display mode and the zoom option.

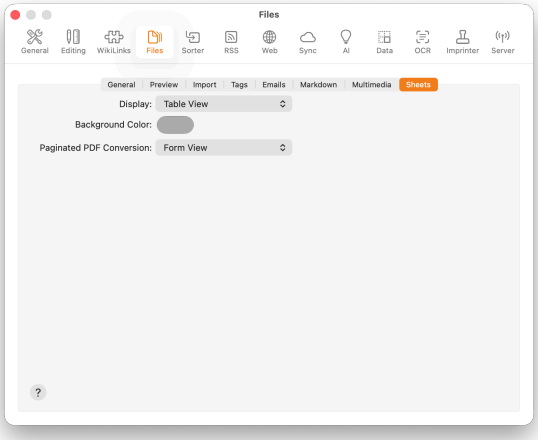
- **Single/Two Page:** Display one or two pages.
- **Continuous:** Display the document as a long scrollable document, zoomed to width.
- **Non-Continuous:** Display only one or two page(s), zoomed to fit. Scrolling up or down changes the pages without displaying previous or subsequent pages.

PDF Clipping Width: Specify a width in points for captured or clipped PDF documents. The default value is *Automatic*. Be aware the styling on specific sites could override this setting.

Summaries: Control if PDF annotations are sorted by type, e.g., highlights or underlined, in *Tools > Summarize Annotations* instead of their order in the document.

Read more about working with PDF and media documents ...

SHEETS



Choose the options for displaying sheets and converting them to paginated PDFs.

Sheet Display: Choose the default view when viewing a sheet: *Table* or *Form*. Form view is only available in the Pro or Server editions.

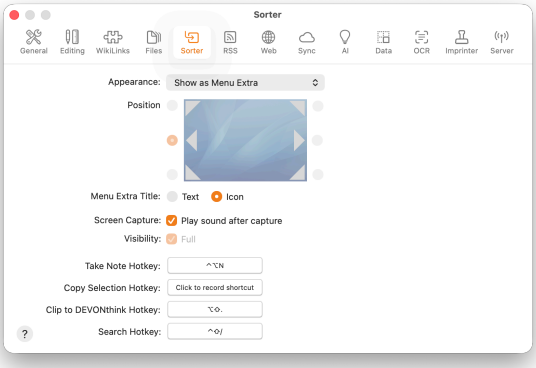
Background Color: Set the background color used in Form view.

Paginated PDF Conversion: Choose *Table View* or *Form View* for converting a sheet via the *Data > Convert > to PDF (Paginated)* command.

Form view is only available in the higher editions of DEVONthink.

Read more about using with sheets...

SORTER



Control the *Sorter's* location and assign hotkeys for note creation and clipping.

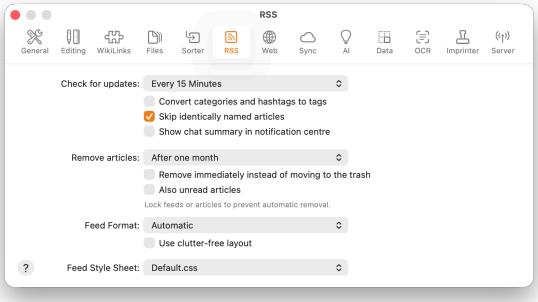
- **Appearance:** Display the Sorter in the menu bar, as a docked tab on the side of your screen, or not at all.
- **Position:** Choose the onscreen position when set to display as a docked tab.
- **Menu Extra Title:** Display DEVONthink or a nautilus icon when set to display in the menu bar.
- **Screen Capture:** Play the system default screen capture sound.
- **Visibility:** Display the Sorter at full or reduced opacity when docked.

Hotkeys: Set system-wide hotkeys for: *Take Note*, *Copy Selection*, *Clip to DEVONthink*, and *Search*. To change the hotkeys, click the *Click to record shortcut* button, then press the hotkey that you want to use. Press the ⎋ Escape key to cancel recording a new shortcut.

> Note: Modern versions of macOS require you to give explicit permissions for the behaviors of the hotkey functions listed above. You can read about this in the *Installing, Privacy Options, Updating, Uninstalling > macOS Privacy Options* section.

Read more about using the Sorter

RSS



DEVONthink comes with built-in RSS capabilities that enable you to add RSS feeds to your database and have DEVONthink update them automatically. Use these preferences to define how often DEVONthink checks for new articles, whether to skip duplicates when updating feeds, when to remove older articles, and which CSS style sheet to use for displaying the articles.

Updating Feeds:

- **Check for updates:** Set how often you want DEVONthink to refresh your feeds. Choose a time-based option from 5 minutes to hourly to once a day, when opening or after synchronizing a specific database, or checking manually.
- **Convert categories and hashtags to tags:** Some RSS articles have tag metadata to help people more easily navigate the publisher's site. Check this option to convert these to DEVONthink tags. Note this can add a great number of tags to your database.
- **Skip identically named articles:** The same article can be delivered when using multiple RSS feeds from one site. Enable this option to avoid downloading duplicate articles.
- **Show chat summary in notification center:** Display a AI-generated summary when new articles arrives.

Remove Articles:

- **Remove articles:** Set how often older articles are removed from the feed. Check *Also unread articles* to remove them, even if they're unread.
- **Remove immediately instead of moving to the trash:** Immediately delete the RSS articles from your database.
- **Also unread articles:** Remove all articles at the specified interval whether they've been read or not.

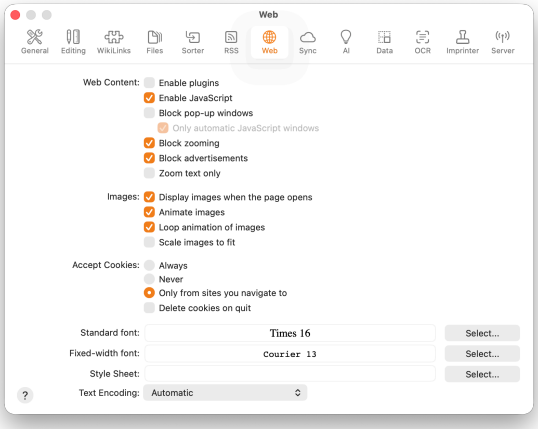
> Note: Feeds or articles locked via *Data > Mark > as Locked* will not be removed.

Feed Format:

- **Feed Format:** Choose a file format for the downloaded articles. (RSS articles are presented as HTML files, by default.)
- **Use clutter-free layout:** Remove extraneous items from web archive and single-page PDFs.

Feed Style Sheet: Choose a custom or built-in stylesheet for use with HTML articles (*Feed Format: Automatic*) articles. Store your own RSS stylesheets in `~/Library/Application Support/DEVONthink/StyleSheets`.

WEB



The web preferences resembles the settings of most web browsers. Use these preferences to define how DEVONthink's displays HTML-based documents browsing web pages.

Web Content: These settings define how DEVONthink treats special web contents:

- **Enable ...:** Check these options to use installed third-party plugins, Java applets, or JavaScript scripts used by a web page.
- **Block ...:** Check *Block pop-up windows* to block pop-up windows, which are often advertisements; check *Only automatic JavaScript windows* to block only pop-up windows opened by JavaScript. Uncheck this option if the web page you're visiting uses pop-up windows for actual content. (Some web content management systems do this.) Check *Block zooming* to keep web sites from automatically zooming windows to full size. Check *Block advertisement* to attempt to block advertisements when possible.
- **Zoom text only:** Magnify only the text, not the images when using the *View > Zoom* commands.

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

- **Display images when the page opens:** Check this option to display web pages with images. Just remember, if unchecked, you may miss some information.
- **Animate images, Loop animation:** Check these options to run web graphics animations and to run animated graphics in a loop.
- **Scale images to fit:** Check this option to scale (large) images to fit the current window.

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

- **Always:** Accept all cookies.
- **Never:** Don't accept any cookies.
- **Only from sites you navigate to:** Accept cookies, but only from web sites you

navigate to (not from other sites, such as ad trackers).

- **Delete cookies on quit:** Delete all stored cookies when you quit DEVONthink.

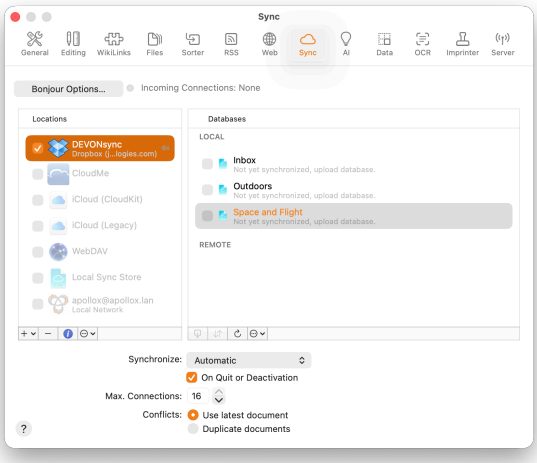
Fonts: Set the fonts you want to use for displaying web pages; set separately for variable-width and fixed-width text.

> Note: Hold the ⌥ Option key to restore the default fonts.

Style Sheet: Select a custom stylesheet to be applied to HTML-based content with no specified styling. Store your own stylesheets in `~/Library/Application Support/DEVONthink/StyleSheets`. Be aware this could lead to displaying undesirable styling in some cases.

Text Encoding: Select your desired text encoding for displaying web pages. *Automatic* tries to choose the best available encoding. If this does not work for you, choose a more appropriate text encoding for your language group.

SYNC



DEVONthink allows you to keep your databases in sync with multiple Macs and iOS devices running DEVONthink To Go. Set up your sync location, choose which databases are synced, and how often they're synced.

LOCATIONS

The *Locations* column lists all available sync locations, whether these are the built-in options, ones you've added yourself, or ones detected on your network, e.g., WebDAV services. Activate or disable sync locations via its checkbox. Inactive or inaccessible locations are shown in grey. And if a sync location is using encryption, 🔑 will appear to the right of the name.

Use the buttons below the Locations list for more options:

- **Add Location:** Add a new sync location with the + button e.g., to add another local sync store.
- **Remove Location:** Remove a selected sync location with the - button. It is generally

a good idea to clean the location before removing it.
- **Show Info:** Display a popup with editable details of the selected sync location.

The *Locations Action* menu also is used for information, troubleshooting, and removing chosen sync locations.

- **Reveal in Finder:** Opens a Finder window revealing a selected local sync sync store.
- **Verify Location:** Used in troubleshooting situations, this quickly verifies the integrity of the sync data of the chosen sync location. Hold the ⌥ key to select *Verify Location Thoroughly*.
- **Clean Location:** Also used in troubleshooting, this removes all the sync data in the selected location.

SYNC LOCATION OPTIONS

When setting up a sync location or editing the options on an existing one, you will see some of these options in the Info popup for the location. The options shown are dependent on the specific sync method:

- **Encryption:** The key used to encrypt the sync data (AES-256). This is not mandatory, but recommended. There are no length or character requirements.
- **Sync Store Name:** The name of the sync store, ideally with no spaces for broader compatibility, e.g., `DTSync` or `work_2025`. If you are setting up an already active sync location, e.g., you've already synced from another device, click the dropdown menu to choose from a list of existing stores.
- **Synchronize label names & colors:** Synchronize label names and colors using this location. Be aware, changes to the colors and names on any syncing machine will sync to the others.
- **Synchronize reading positions:** Synchronize reading and playback positions using this location. This can help you keep your place in PDFs you're reading or audio/video you're playing.
- **Synchronize custom metadata definitions:** Synchronize custom metadata definitions found in the higher editions of DEVONthink and actively used on items in your databases. If you are collaboratively syncing, you may want to disable this option to avoid the other party from receiving your specific metadata definitions.
- **Synchronize content of indexed files:** Synchronize the content of indexed files. If you uncheck this option only the metadata about the document will be synchronized. This is generally only used in special circumstances.
- **Verify uploaded items:** Verify all uploaded items to make sure the sync data is intact. Usually only necessary with unstable network connections/servers or in case you experience troubles with defective files.
- **URL:** The URL of a WebDAV server, often including a port and folder where the sync store is located, e.g, `https://herax.local:65501/DEVONsync`. The path is case-sensitive.
- **User name:** The user name for the service.
- **Password:** The password for the service.

DATABASES

With a sync location selected, the *Databases* column lists all currently open databases as well as all databases available remotely in the selected location. The *Local* section lists all open databases and a message about their sync status, e.g, the timestamp of the last sync. The *Remote* section lists all databases available for import or currently not open on the machine. When attempting to import the latter, the local database will be opened by DEVONthink.

Start and stop syncing a specific database to the selected location. Uncheck databases you want to discontinue syncing with the selected location, but be aware this does not remove the sync data. See the *Clean Database* command below.

Use the buttons below the Databases list for more options:

- **Import Database:** Select a remote database and click ⍐ to download the data of the database and save it locally. The database will be automatically configured to sync with this location. Alternatively, you can double-click a remote database to import it.
- **Synchronize Database:** Select a checked database and click ⇵ to manually sync the database with this location.
- **Refresh List:** Refreshes the list of remote databases available in the selected location.

The *Databases Action* menu also contains commands for importing, manually synchronzing, troubleshooting, and removing sync data.

- **Import Database:** Import a database in an unencrypted state. It is possible to import an encrypted database as an unencrypted one, if the situation warrants it.
- **Import Encrypted Database:** Import a database as an encrypted database. You will need to specify the maximum database size and an encryption key. This option also can be used when importing an unencrypted database.
- **Import Revision-Proof Database:** Imports an revision-proof database. This can only be used to import an revision-proof database.
- **Verify Database:** Used in troubleshooting situations, this quickly verifies the integrity of the sync data of the chosen database. Hold the ⌥ key to select *Verify Database Thoroughly*.
- **Clean Database:** Also used in troubleshooting situations, this removes the sync data for the chosen database from the current sync location.
- **Refresh List:** Manually update the Databases list.

Sync messages: Under each listed database in the Databases list, is a message about its sync state. You will see one of these:

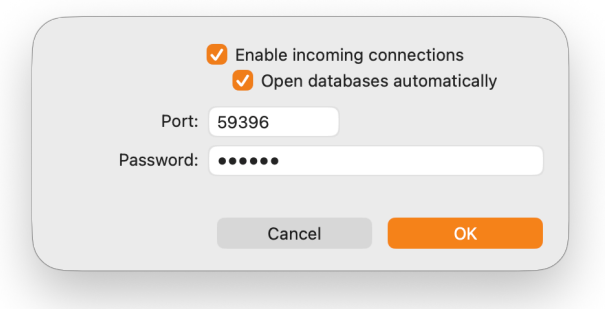
- **Not yet synchronized, upload database:** This database has never been synced to this location.
- **Not yet synchronized, merge with remote database:** This database has been synced to this location from another device, but not yet from this Mac.
- **Last Synchronization,…:** This database has been synced to this location at the time shown.

SYNC OPTIONS

Sync Options: The settings at the bottom of the pane control the behavior for all active sync locations, from how often to sync to how sync conflicts are handled.

- **Synchronize:** Choose if you want to synchronize automatically, manually, or in fixed intervals. Check *On Quit or Deactivation* to automatically synchronize when you quit DEVONthink or when you switch to another application.
- **Max. Connections:** Choose the maximum number of connections DEVONthink should open. The faster your internet connection the higher you can usually go. The recommended value is 16. Note the maximum number is controlled by the service you're using.
- **Conflicts:** Choose how to solve the conflict if an item was changed both locally and remotely before either device synced. *Use latest document* preserves the most recently changed document. *Duplicate documents* keeps both versions of the conflicting item and appends "copy" to the end of one's filename.

BONJOUR OPTIONS

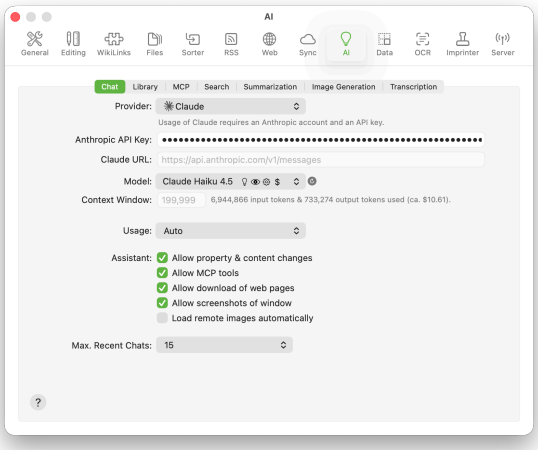


Click the button *Bonjour Options* to control if and how other instances of DEVONthink or DEVONthink To Go can connect to your Mac. Your Mac becomes the sync server, the other devices the clients.

- **Enable incoming connections:** Allow other devices connect to your copy of DEVONthink and synchronize.
- **Open databases automatically:** Open a database automatically when a client device requests syncing with an unopened database.
- **Port:** Set the port number used for incoming connections, if you need to assign a specific port. If not, leave this empty and DEVONthink will choose a random port for you.
- **Password:** Create a password to be used by client devices needing to connect to this Mac as a server. This password is mandatory. This password also encrypts the client-server connection at all times.

Read more about synchronization…

AI



From setting up your default chat engine and deciding what kind of permissions you give it when searching or working with your Mac, the *AI* view is where you set these options. For creating AI-based images, see the *Image Generation* view. And if you need to detect or convert speech to text in images and media files, see the *Transcription* view.

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.

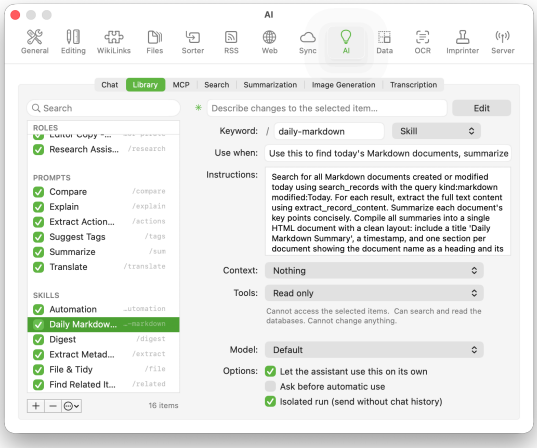
- **Provider:** Choose from the list of supported chat engines, e.g, ChatGPT, Anthropic's Claude, or even one you are running locally.
- **API Key:** Enter the personalized key you were provided by your AI service provider.
- **URL:** Enter the URL of a locally running LLM server. This option will only appear as needed.
- **Model:** Choose from the list of models for a specific LLM, e.g., Gemini Flash 8B. Each model may show one of several icons showing its capabilities: 💡 for reasoning, 👁 for vision, ⚙ for tooling, 🔍 for deep search, ⌨ for coding support, and $ for cost, with the icon's boldness indicating higher or lower costs.
- **Context Window:** This is the number of tokens 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. Bear in mind, this setting can be set per model as each has its own context window size.
- **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.
- **Role:** Define an optional default "persona" or instructions for the AI, e.g., "You are an undergraduate professor presenting to your class. Use Markdown formatting with sections and subsections but no lists. Include links to your sources." This is used in automation, like AI assisted scripting.

Assistant: Certain AI models have access to "tooling" and may be able to accept DEVONthink-related commands. You need to decide what behaviors you will allow it to use 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 MCP tools:** Give the Chat assistant access to DEVONthink's own MCP server.
- **Allow download of web pages:** Allow AI to download the content of web pages to examine as part of its querying process. This may be considered an insecure option.
- **Allow screenshots of window:** Allow the AI assistant to capture and examine a screen capture of DEVONthink's window for use in queries. Requires a compatible AI model, e.g, Claude Sonnet.
- **Load remote images automatically:** Control whether linked images in web content is downloaded for examination. This may be considered an insecure option.

Max. Recent Chats: Set the number of remembered chats you can revisit in the *Recent Chats* popup in the *Chat* assistant.

LIBRARY



This pane is where you can define your own custom repository of roles, prompts, and skills to use with external AI. From creating "personalities" like subject matter experts to having a ready-made set of prompts you often use to going beyond simple inquiries with skills built from more complex instruction sets, there are things to explore and opportunities to push the limits with AI and DEVONthink. The interface is divided into a "bookshelf" of several built-in options and – where you'll add your own – and the controls to create and modify them.

Function List: On the left is the list of all your AI functions. Select one to see its controls and parameters on the right. Add or remove functions with the plus and minus buttons at the bottom of the pane. The ⊙ button has commands for creating new functions of each type: *Prompt*, *Role*, or *Skill*. There are also these commands: *Duplicate*, *Rename*, *Import*, *Export*, and *Delete*. If you delete some of the built-in functions, you can restore them via *Add Default Items*.

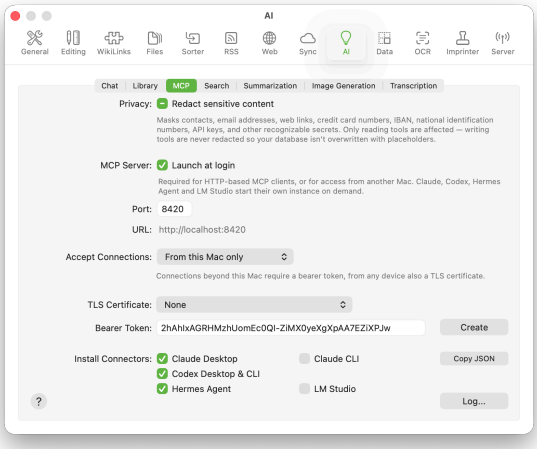
Controls: When editing an AI function, you will use the controls on the righthand side. These let you define what you want to happen, when you want it to happen, and what level of autonomy you give AI in accomplishing the tasks. Here are the other available controls:

- **Keywords:** Also known as slash commands, are abbreviations for quickly using one of your library items. When you type a forward slash, e.g., in the *Chat* assistant, a popup will show possible function matches so you can quickly run one with a few taps.
- **Command Type:** Choose the type of function, *Prompt*, *Role*, or *Skill*
- **Use when:** This is a description of the AI function, the "when" or "why" is used.
- **Instructions:** Define the commands, parameters, and requirements sent to and used by AI.
- **Context:** Define what the function applies to. This can be nothing, selection, or items the *Chat* assistant is handling. A selection can be selected text or an item. Selected items can have their text, text and images, or you can let the Chat assistant decide the appropriate use.
- **Tools:** Choose how much AI can do with your data, either *Nothing*, *Read only*, *Read & organize*, *Read & edit contents*, or *Read, organize & automate*. The tooltip under the popup shows specific information about the scope of its action.
- **Model:** Choose a function-specific model, helpful if you have lighter tasks requiring less expensive models, or use the default chosen in the *AI > Chat* settings.
- **Options:** One last suite of settings are specific options for the Chat assistant.

  Let the assistant use this on its own determines if AI can determine and use this as it seems appropriate. *Ask before automatic use* requires AI to ask permission before using a function. And *Isolated run* doesn't use the chat history when using the function.

If you're interested in expanding your AI integration, you can read more about using this pane in the Automation > AI Prompts, Roles, and Skills section.

MCP



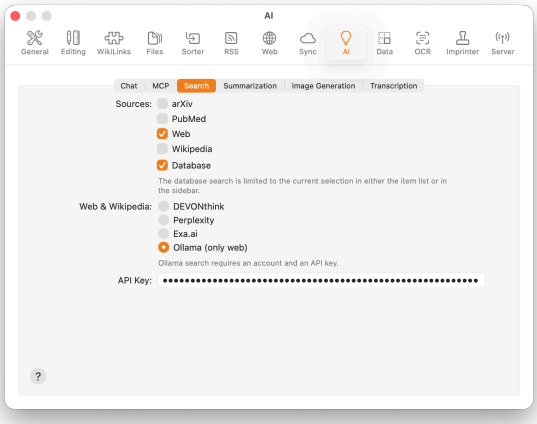
The *MCP* settings provide controls for setting up DEVONthink's MCP server, allowing connecting to and working with your databases while outside our application.

- **Privacy:** Enable *Redact sensitive content* to remove or obscure recognizable private information like credit card numbers, email addresses, phone numbers, etc. before the content is sent to the AI model.
- **MCP Server:** If you are integrating with Claude Code or other HTTP-based MCP clients, enable *Launch at login*. Note that Claude Desktop and Cowork launch their own instance of the server as they need it.

- **Port:** The port the server is using, even when running locally. A default port is assigned but can be changed to a different unused port, as needed.
- **URL:** Select and copy this URL to use in other applications or on other devices accessing the MCP server.
- **Accept connections:** Choose *From the Mac only* to restrict access only to local use, *From the local network* to connect to devices on your network, or *Any device* to allow even remote connections. The last two options require a valid TLS certificate and bearer token.
- **TLS Certificate:** Choose an existing valid TLS certificate you have installed. Note that self-signed certificates aren't supported.
- **Bearer Token:** Connecting other devices requires a bearer token for authentication. Press the *Create* button to generate one specifically for DEVONthink's MCP server.
- **Install Connectors:** If you are chatting or using Cowork in Claude Desktop, click *Claude Desktop*. If you have installed the Claude Code command-line interface (CLI), enable *Claude CLI*. For OpenAI's Codex access, enable *Codex Desktop & CLI*. To use the Hermes Agent, including via Ollama, click *Install for Hermes Agent*. If you're using LM Studio, enable *LM Studio*. Each option will only be enabled if the respective application is installed.
- **Copy JSON:** Click this button to copy the underlying `-stdio` connection information as JSON. This can be added to the configuration files of compatible MCP applications.
- **Log:** To access information about what's happening with the MCP server, click the *Log* button.

You can read more about using the MCP server in the AI in Practice > Assistants section.

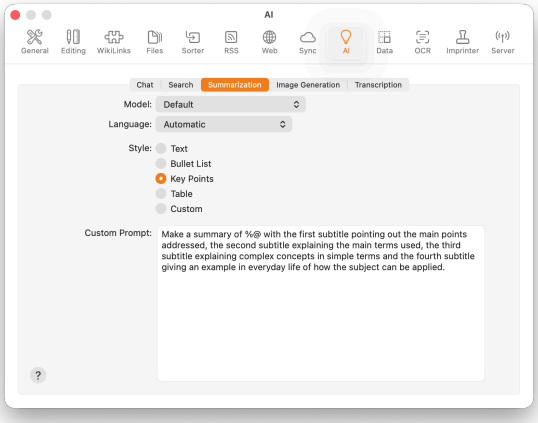
SEARCH



The *Search* settings control where you want external AI to search. For example, when researching medical issues, you may want to let it search PubMed but not Wikipedia. The options are: in your Databases, on the *arXiv*, *PubMed* or *Wikipedia* websites, or on the *Web*, in general.

Regarding web and Wikipedia searching, you can also choose a specific engine for deep research: DEVONthink, Brave Search, Exa AI, ollama.com, Perplexity, or Tavily. The commercial services provide quick results but utilize indexed content. DEVONthink's results are returned more slowly but are up to date. Also, be aware the commercial services require an account and an API key.

SUMMARIZATION



Model: Choose a specific AI provider and model for summarization or *Default* to use the *Chat* model.

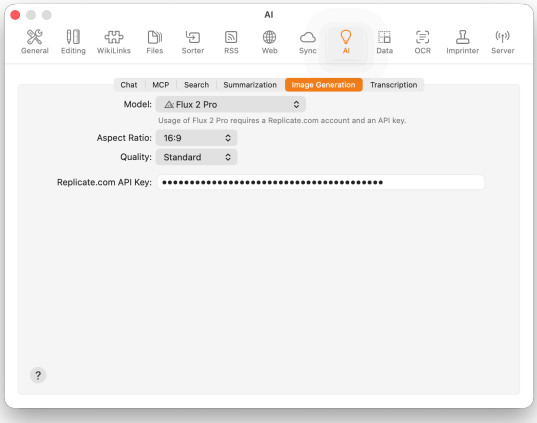
Language: Choose a specific language to use for the summary or leave it as *Automatic* to use the system's primary language.

Style: Determine what 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.
- **Bullet Points:** 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 in this settings pane.

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

IMAGE GENERATION

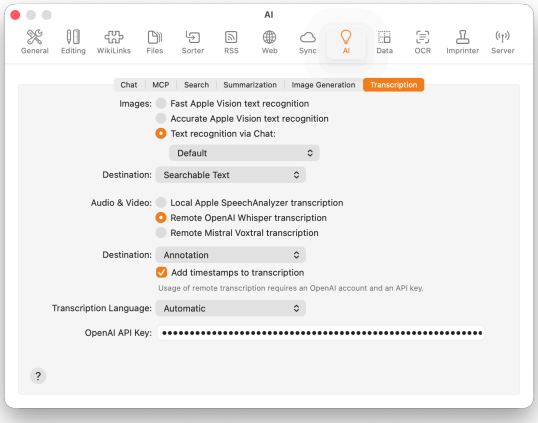


Choose and set up a text-to-image AI model. These controls are dynamic and their options change depending on the model you choose.

Image Generator Setup:

- **Model:** Choose a supported text-to-image model, e.g, Flux Pro or Nano Banana 2.
- **Aspect Ratio:** Choose a predefined aspect ratio for the images. Supported sizes are: `1:1`, `16:9 (9:16)`, and `4:3 (3:4)`, depending on the chosen model.
- **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.

TRANSCRIPTION



AI speech-to-text processes incoming media files and processes them per these settings. For example, an `.mp3` file could be transcribed into a separate annotation file for future use.

For each type of text recognition, images or audio/video, choose where to store the recognized text via the *Destination* dropdown. The available options are:

- **Searchable Text:** This is similar to Apple's Live Text feature in that a text layer isn't added to the document, but instead is stored in the database's index and associated with the file.
- **Annotation:** Create an annotation file with the transcribed text.
- **Comment:** Add the transcribed text as a Finder comment on the file.

Images: Decide what live OCR engine you want to process images added to your database:

- **Fast Apple Vision text recognition:** Quickly detect text in images using Apple's Vision framework. Often sufficient for many use cases.
- **Accurate Apple Vision text recognition:** Detect text in images with an emphasis on accuracy over speed.
- **Text recognition via chat:** Uses your chosen Chat model to detect text in images, provided the model supports image analysis. When enabled, you can choose a vision-capable AI model, if desired.

Audio & Video: Choose the transcription engine you want to process media files added to your database:

- **Local Apple SpeechAnalyzer transcription:** Transcribe audio on your Mac with Apple's SpeechAnalyzer framework.
- **Remote OpenAI Whisper transcription:** Transcribe audio remotely with OpenAI's Whisper service.
- **Remote Mistral Voxtral transcription:** Transcribe audio via Mistral's Voxtral Mini model.
- **Remote Google Gemini transcription:** Transcribe audio via Google Gemini's audio transcription capabilities.

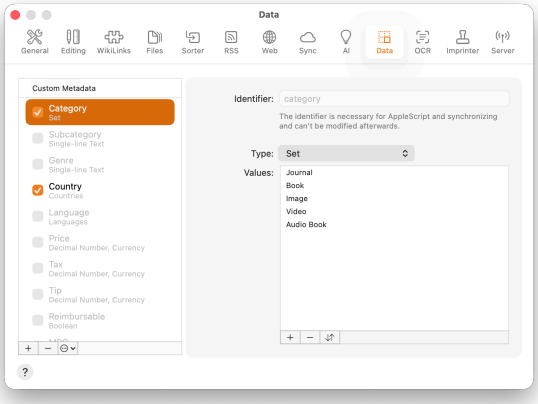
> Note: On macOS 10.13.5 Ventura and 10.14 Sonoma, Apple's audio transcription engines are *Local Apple Speech transcription* and *Remote Apple Speech transcription* The local engine may be less accurate and requires Siri or Dictation to be enabled on your Mac. However, you aren't required to share the information with Apple. Also, OpenAI's transcription is done via GPT-4o.

Add timestamps to transcription: Examines the speech and inserts timestamps at certain points.

Transcription Language: Choose the language of the media file to be transcribed. Only used with OpenAI's Whisper.

API Key: Enter the API key you received from your AI transcription provider, e.g., OpenAI.

DATA



Define custom metadata fields that are meaningful to you, your company, your research group, or even your family! These attributes can be assigned to items in your database, extending the search and organization possibilities.

Custom Metadata: The *Custom Metadata* column contains a range of built-in fields, ready to use or modify, as needed. These cover a variety of common uses and you can easily add your own for your use cases.

Enable any field by checking the checkbox next to it. Use the buttons below the *Custom Metadata* column for extra options:

- **Add:** Click the + to create and name a new custom field.
- **Remove:** Click the - to remove any field. When deleting a field, a warning will be displayed. This warning can be suppressed.
- **Action:** Select any field and click ⚙ for more options, including duplicating, renaming, or removing the selected field. You can also restore the default metadata fields from this menu.

> Note: These options are also available from the context menu.

The order of the fields is also the order in which they appear in the *Generic* inspector. Drag the attributes to reorder them, as needed.

Properties: Each custom attribute has its own properties, like the type or a set of predefined values to choose from. View and set the properties of a selected attribute in the section on the right.

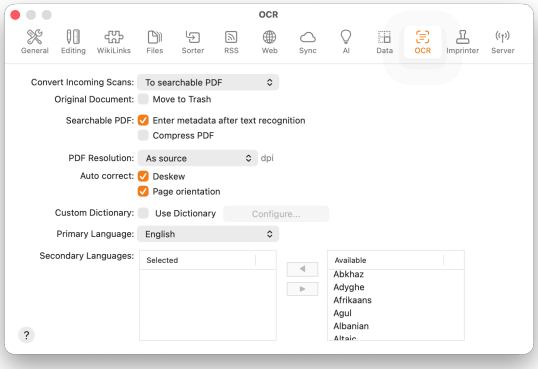
- **Identifier:** This is a special name used in automation. The term is created by DEVONthink and cannot be entered or modified manually.
- **Type:** This is the specific type of the current field. Choose one of twelve data types, such as *Date*, *Boolean*, *Decimal Number*, or *Languages*.
- **Format:** Only displayed with certain data types, you can choose some pre-defined formats, like *Percent*. With the *Currency* option, you will have an option to enter a currency symbol.
- **Values:** Only displayed with the *Single-line Text* and *Set* types, define a list of items to choose from. These choices will be displayed in a dropdown menu when in

use. Add and remove the items with the + and - buttons. Control-click an item to change it. If you'd like to resort the items to alphabetical order click the opposing arrows button.

Please refer to the Data section in the Appendix for more detailed information on the data types.

> Note: Like many types of metadata applied to files by various applications, custom metadata is not cross-platform. On macOS, it is stored in the extended attributes upon exporting the file.

OCR



DEVONthink contains an optical character recognition (OCR) module that allows you to import scanned documents and make them searchable. These documents are "read" by the embedded OCR engine and stored as PDF files that contain an additional (invisible) text layer containing the searchable text. Use these options to control the engine, including the output format, resolution, what language(s) to use, and what to do with the originals.

OCR Processing:

- **Convert Incoming Scans:** Choose the file format for images or PDF files received from a known scanning software, e.g., ScanSnap Home: *searchable PDF*, *RTF document*, *Word document*, or *WebArchive*. Use *No Action* to disable OCR for incoming scans, e.g., if the scanning software has already done OCR.
- **Original Document:** Check *Move to Trash* to move the original documents to the trash after OCR is completed.
- **Enter metadata after text recognition:** Opens a metadata panel, post-OCR, where you adjust any of the properties: title, author, subject, tags, and creation date.

Document Controls:

- **Compress PDF:** Create smaller PDFs by applying compression to the final document. Compression only applies when adding metadata post-OCR or preserving annotations from an original PDF after OCR.
- **PDF Resolution:** Set the desired resolution for the image layer in the PDF from 150 to 600 dpi. On M-series Macs, you can also choose *As source* to retain the originally scanned resolution.
- **Page Orientation:** Detect and correct the page orientation.
- **Deskew:** Correct angled pages in the final document.

Language Controls:

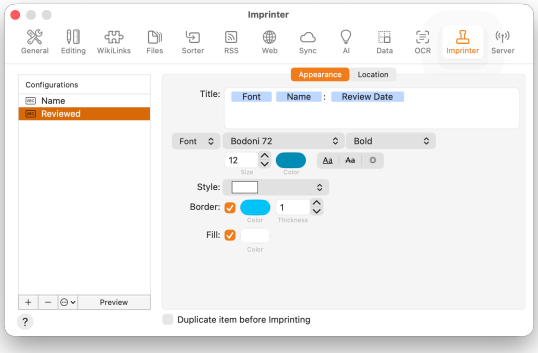
- **Custom Dictionary:** Check *Use Dictionary* to use a custom dictionary of acceptable words. For example, you may have an unusual spelling of someone's name in

some documents. You can enter the name as an acceptable choice for the OCR engine to choose from. Click the *Configure* button to add custom entries for OCR detection. Note you can only have one dictionary, specified for the language chosen in the *Language* dropdown.

- **Primary Language:** Set the most common language of the documents you scan.
- **Secondary Languages:** Add other languages to match the language of specific documents you're processing.

DEVONthink comes with more than 150 different language dictionaries. Adding extra languages can improve the accuracy of the text recognition. Select a language from the *Available* column on the right and add it to the *Selected* column using the right-to-left arrow button. Deactivate a language by selecting it in the *Selected* and pressing the right-to-left arrow. You can select a maximum of four secondary languages. Note the primary language and the secondary languages are treated equally.

IMPRINTER



Imprints are custom bits of data that can be stamped onto images or the pages of PDF documents. Imprints can be used in a variety of ways, from stamping when an invoice was paid to adding specialized numbering. With the ability to include placeholders, you can create many kinds of watermarks for your documents.

Every imprint is created as a configuration, saved to use again and again. There are three parts to an imprint: the configuration, the appearance, and the location. We'll cover all three here.

CONFIGURATIONS

The *Configurations* column is where you create a new imprint or edit one you've already created. Select one and edit any of the parts or appearance or use the buttons below this column to create a new one.

- **Add:** Click the + to create and name a new configuration.
- **Remove:** Click the - button to remove a selected configuration.
- **Action:** Select any field and click ⚙ for more options, including duplicating, renaming, and deleting the selected configuration. A special item in the menu, *New Combined* is discussed below.
- **Preview:** Click this button to display an example of the imprint with the current settings.

New Combined: Found in the ⚙ action menu, this option allows you to create new imprints from your existing ones. This extends the usefulness of existing imprints.

From the action menu, select the *New Combined* option. Two panes will be displayed: *Combined* and a *Configurations* panes. In the righthand pane, select an

existing configuration and click the < button to add it to the *Combined* pane in the center. DEVONthink remembers the location and styling of the individual imprints in a combined configuration. To remove an item from the *Combined* pane, select it and press the > button. It will reappear in the *Configurations* pane on the right. Combined items will be displayed in the order you add them. To see what the imprint looks like, press the *Preview* button.

APPEARANCE

Add and style the components of the imprint with these controls.

- **Title:** This is the body of the imprint. Type any static text you want to appear in the imprint. *Control-click > Insert Placeholder* to define sections of the watermark with placeholders. Tabs and linebreaks are also entered as placeholders. If you need to rearrange the parts, you can easily do this via cut and paste.
- **Font:** In the *Font* options, choose the font, weight, color, and other styling for the watermark. If you choose the outline style, you can choose the *Thickness* of the outline.
- **Border Style:** Choose and style a pre-defined border, if desired. When using a border, you can also specify the border *Color* and *Thickness* and an optional *Fill* color.

> Note: There is only one font style for each imprint. You cannot have mixed styles, e.g., displaying one word larger or in a different color.

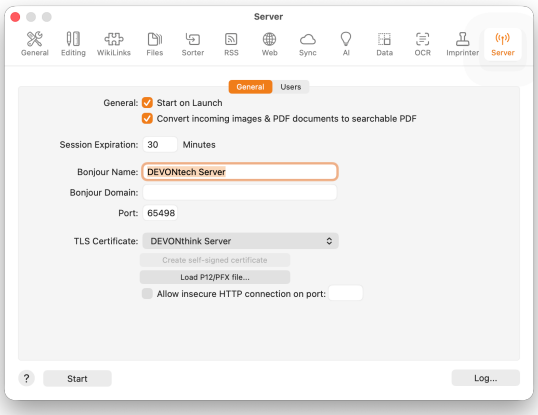
LOCATION

In the *Location* tab, choose and fine-tune the position of the watermark, as well as on what pages it will appear.

- **Position:** Set the anchor point for the imprint's location on the document, e.g, clicking the center point centers the imprint horizontally and vertically on the page.
- **Offset X/Y:** Fine-tune the position of the watermark. Negative values are to the left (X) and down (Y), positive values are to the right (X) and up (Y), relative to the anchor point of the imprint.
- **Rotate:** Set your imprint on an angle, if desired.
- **Occurrence:** Choose what pages the imprint should appear on. Use *Custom* to have the imprint appear on specific pages.

> Note: Be aware imprints currently cannot be removed from the document. Especially while you're fine-tuning your imprint, it's a good idea to enable *Duplicate item before imprinting*. This will imprint a copy of the current document.

SERVER



Set up the web sharing services, define users and their per-database permissions, and run/monitor the web server. Enter the web server's parameters and behavior in the *General* tab. In the *Users* tab, administer users and their per-database permissions and monitor or access connection information.

> Note: When using the server in administered networks, e.g., public, corporate, or educational scenarios, you may need to consult with the IT department for successful operation.

GENERAL

- **Start on Launch:** Set the web server to run when DEVONthink launches.
- **Convert images & PDF documents to searchable PDF:** Control whether images and non-OCR'd PDFs added to the web sharing interface are automatically converted to searchable PDFs.

Session Expiration: Define the length of time before an idle session times out.

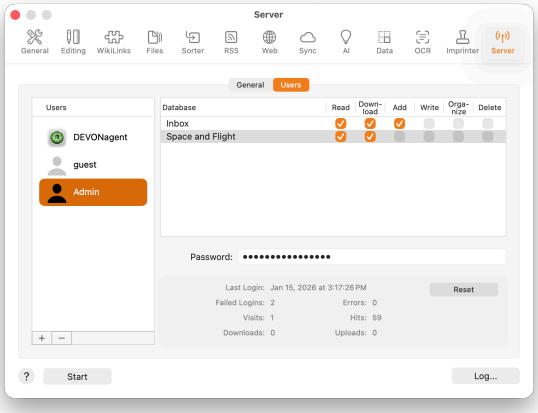
Bonjour Settings: Use these settings to define your web server's identity, everything from the name and port, to creating a certificate vouching for the "safety" of the server's activity.

- **Bonjour Name:** Enter a distinct name for your web server to clearly identify it to your users.
- **Bonjour Domain:** Set the Bonjour domain if necessary. Leave this field empty unless you know what you're doing.
- **Port:** Set a static port if the server will be accessed regularly, or from outside your network. If this field is left empty, DEVONthink will assign a random, unused port eachtime the web server launches. While setting a static port is suggested, non-standard ports can be prohibited on some networks, so consult with your IT department.

Security:

- **TLS Certificate:** If you have a TLS Certificate, select it from this dropdown.
- **P12 Certificate:** If you have been issued a P12 file, import it by clicking the *Load P12 file* button.
- **Self-signed Certificate:** Create a self-signed certificate for DEVONthink. The certificate is created as *DEVONthink Server*.
- **Allow insecure HTTP connection on port:** DEVONthink's server runs on SSL connections for secure browsing. If you have a compelling reason to use the older *http* protocol, check this box and enter the port to be used.

USERS



User List: The *Users* tab on the left allows you to add, remove, and modify users, as well as set their per-database permissions. Currently logged-in users will show a green circle to the right of their name. If you have DEVONagent Pro installed, it will be added as a default user. This allows it to search DEVONthink's databases in the same way it searches other websites.

- **Add:** Click the + button to add a new user.
- **Remove:** Click the - button to remove a user.
- **Password:** Select a user and enter a login password.

Database Permissions: The *Database* list on the right allows you to set per-database permissions for individual users. All open databases will be listed in this pane, followed by the available permissions. Select a user and enable the permissions they need to have. For broader changes, Control-click the permissions for a database to set or revoke all permissions on the database.

The available permissions are:

- **Read:** Allow the user to access the database. When unchecked the database will not be visible to the user in web sharing.
- **Download:** Allow the user to download documents from the database.
- **Write:** Allow the user to modify the contents of certain editable file types, e.g., plain text.
- **Add:** Allow the user to add items to the database.
- **Organize:** Allow the user to move around documents and groups in the database.
- **Delete:** Allow the user to delete items from the database.

Technical Info: If you need more information on the activity of the web server, you can find some deeper details here.

- **Server Details:** The section under the *Databases* pane shows some basic technical data about DEVONthink's server activity.
- **Log:** In cases where deeper technical information about the server's activities is required, click the *Log* button in the lower right corner. The log file will open in macOS' Console application.

Server URLs: When the server is running, two URLs will be listed at the bottom of the window: one is the Bonjour URL, the other is based on the machine's IP address. Click a link to open it on your machine. Control-click a link to copy or share the link to your users.

Read more about Web sharing...

TROUBLESHOOTING

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DEVONthink was created with robustness in mind. But any computer hardware or software, regardless of how carefully developed and built, can write defective data or destroy files. If you have some general questions about DEVONthink, sales and licensing, etc., please check out our Questions and Answers section on our site. If you experience specific technical problems with DEVONthink or its databases, please check the following sections.

We hope the information in this chapter can help resolve an issue, or at least give you some information to work with!

FIRST STEPS

When you run into an issue with DEVONthink, your first reaction should be, "Hmm… I wonder what that was." and see if it happens again. If it recurs, the next things you should do are:

- **Reboot:** Reboot your machine. Rebooting a machine can often cure a host of issues, closing down rogue processes, releasing memory, etc. We suggest rebooting your devices at least once a week, just to mitigate potential issues.
- **Update:** You should ensure your operating system is up to date. We are not advocating "upgrading" the OS, like from Sonoma to Sequoia. We are talking about "updating". So if the current version of your OS is 15.3.1 and you're running 15.2, get your machine up to date. (And yes, this nicely facilitates a reboot in the process!)
- **Ask:** Check through this chapter or jump over to our forums to see if anyone else has experienced your issue.
- **Report:** If you don't find an answer in the appropriate sections in this chapter, please do the following: Hold the ⌥ Option key and choose *Help > Report Bug*. This creates a draft email, ready to send to us, containing troubleshooting information and logs. You can also send us full-resolution screen captures (or screencasts), if they'd be helpful in illustrating the issue you're experiencing.

NOT YOUR FIRST STEP

When some people have an issue, they immediately try uninstalling and reinstalling the application. That is a very bad idea and almost always wastes time and energy on something with that likely has a simple and logical solution. And not only is reinstalling

rarely effective, it also removes important troubleshooting information that could have been useful in resolving an issue.

So if you run into a problem do *not* reinstall the software. Contact us as we've indicated so we can assess the situation. If we come to a point we feel reinstalling is appropriate, we will instruct you to do so.

FILE ISSUES

WHY DOES DEVONTHINK NOT RECOGNIZE MY FILES?

DEVONthink supports importing many different file types. However, here are thousands of types and we can't guarantee trouble-free importing or usefulness with every type.

If DEVONthink does not recognize a file, make sure the file has a proper file name extension. DEVONthink needs a file name extension to determine the file type. Add the correct file name extension to your files, e.g., `.txt` for plain text files, etc.

There are only a few files that are explicitly not importable: Finder aliases or other databases, e.g., `dtBase2`, or items located in the internals of other databases.

WHY DOES DEVONTHINK NOT DISPLAY MY DOCUMENT CORRECTLY?

DEVONthink uses Apple's Quick Look technology to display previews of many file formats. If a document is not properly displayed, especially if it is a proprietary file format, it may be you don't have a QuickLook plugin installed for this file type or the application that created the file is not installed on your Mac (and supports Quick Look). Control-click the file and choose *Show In Finder* to reveal it. With the file selected in the Finder, press the spacebar to open a Quick Look window to determine if the item is viewable.

WHY CAN'T I SEARCH MY FILE?

Merely importing a file doesn't mean it's immediately searchable. For example, images are not content-searchable unless you've used *AI transcription*, set to *Searchable Text* or *Comments*.

For proprietary formats, you need to have a Spotlight importer installed. These components come from third-parties, typically the developer of the format or an application that can edit it. If there is a Spotlight importer available for the file format you're adding to your database, DEVONthink may be able to use it to gather some information about the document. The kind and amount of information is dependent on how the importer was developed.

MISBEHAVING FILES

PDFs: PDFs have been around so long, it would seem they'd be easily supported in DEVONthink. However, the truth is there are many bad PDFs out there. If you encounter a bad PDF, try acquiring a new copy of the file.

If you're having an issue annotating or editing a PDF, it's possible it is encrypted or read-only. This will be indicated with either a 🔒 or 🖉 property icon in the *Navigation bar*.

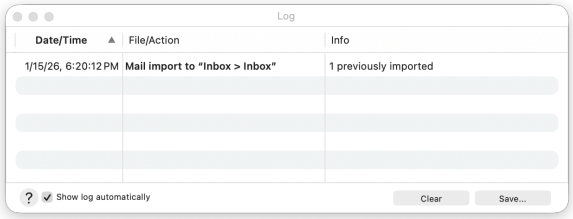
You may be able to clear a read-only status with the *Data > Convert > To PDF (Paginated)* command.

If the file is encrypted in such a way as to inhibit changing the document, DEVONthink will honor the restrictions imposed by the document's producer. However, one potential solution for this problem is Michele Balistreri's PDFKey. It allows you to print protected PDFs. Use PDFKey to "print" a PDF file into a new PDF that is both printable and editable, which allows DEVONthink to extract the text for searching and classifying.

DEVONthink uses Apple's PDFKit framework, the same as found in their Preview application. If you have an issue with a PDF in DEVONthink, check to see if you have the same issue in Preview. Other applications, including those from Adobe where PDFs were invented, are using their own frameworks so their behavior isn't directly comparable.

Text Files: If you have an issue with plain or rich text documents, open them in TextEdit and see if the behavior is the same. DEVONthink uses macOS' text engine, so if there's an issue in our software it's likely you will see the same issue in TextEdit.

EMAIL IMPORT ISSUES



Messages aren't imported or can't be filed: Email messages are imported with a special identifier (UUID) that helps DEVONthink keep track of messages that have already been imported. Since a UUID must be unique, you can't have more than one file with that identifier. If you try to import the same message into a database, you will receive a logged message stating "n emails already imported".

Importing takes a long time or stalls: Importing email is not a trivial process. Not only does it copy the message into your database, but it also reads and analyzes the entire contents of each one. Importing a large mailbox will logically take much longer than a smaller one. One possibility is to split a large mailbox into multiple smaller ones. Importing smaller batches often proves to be less taxing on the machine's resources. And you don't have to import an entire mailbox at once.

Most email is handled via IMAP servers where your emails are stored, potentially so you can access them from different devices. Some of your emails and their headers will be stored on your Mac but the content can be periodically removed by Mail, leaving only the headers. This means Mail has to contact the email server and download the email (and its attachments) before it can pass it along to DEVONthink. This can slow the

import process a great deal. And depending on the retention policy of the email server, it's also possible some emails may no longer be available.

Having emails local to the machine is ideal and can be accomplished by using an *On My Mac* mailbox in Apple Mail. For example, you could create a *2024* mailbox, search for emails from that year, and move or copy the emails to it. Be aware that moving the emails may remove them from the email server, but that depends on the email service provider. Also, if you're archiving emails, it may be desirable to remove them. If not, you can copy them. As was already mentioned, smaller mailboxes will be more performant, so dividing up the emails into logical mailboxes like our yearly example, is a good idea. Going forward you could set up mail rules in Apple Mail to copy or move to local email folders when they're received.

Regarding attachments, again local is ideal. In the settings for your email account in Apple Mail, there is an option to download attachments. If you're going to be importing emails and attachments, it's best to download them all.

One thing to consider is the space being used on your machine. A few things: The On My Mac mailboxes aren't necessarily permanent. After you have archived one successfully into DEVONthink, you could remove the mailbox. You could also relocate the database to an external hard drive.

Some emails fail when I drag and drop: Your email in Apple Mail is actually a database. Very active databases, with many additions, deletions, reorganizing, etc., can inherit inconsistencies over time. If you are receiving a message that a drag and drop into DEVONthink failed, it could be due to such an issue in Mail. Choose *Mailbox > Rebuild Mailbox* and let it finish. Then try the drag and drop again. You can also try dragging and dropping to the Finder first, then into your database.

Why can't I import from email application X?: Inter-application communication, something at which DEVONthink excels, isn't universally developed. In order for more true automation between applications to occur, the developers need to implement robust and reliable mechanisms, like AppleScript. Some apps may provide simple URL schemes but they are limited in use and capabilities, often only able to process one file at a time. Better results can usually be had by merely dragging and dropping. For email clients with a good AppleScript dictionary, the potential for streamlined workflows is increased.

UNLOCKING A DATABASE

If you open DEVONthink and see an icon of a crossed pencil to the right of the database's name, the database has a file permissions issue. This makes the database readable, but not writeable, so you can't modify the contents in any way.

A permissions issue like this is uncommon but generally caused by three events, in order from most to least common: restoring from Apple's Migration Assistant, restoring from Time Machine, or an operating system or hardware error. Doing things like using Migration Assistant will not always cause a

permissions issue, but if you have a crossed pencil icon and you've recently migrated to a new machine, this would be the likely cause.

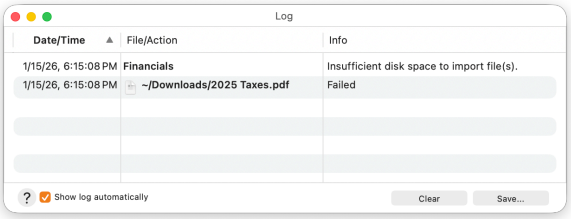
The first thing you can try is to select the database in DEVONthink then choose *File > Rebuild Database*. Do not interrupt the process or let the machine power down while it's working.

If that doesn't resolve the issue, try this:

- **Step 1:** Close the database in DEVONthink.
- **Step 2:** Locate your database. If it's the Global Inbox, it's located in `~/Library/Application Support/DEVONthink`. For other databases, do a Spotlight search for `kind:database dtBase2`.
- **Step 3:** Select the database file and press ⌘I to show the *Info* pane.
- **Step 4:** At the bottom, you'll see *Sharing & Permissions*. Click the *lock icon* to unlock it. You will be prompted to enter your administrative password. (This is the password you use to log into your account on your Mac.)
- **Step 5:** Make sure the account marked *(Me)* is set to *Read & Write*.
- **Step 6:** Click the Action menu and choose *Apply to enclosed items*, if it is available, then close the *Info* pane.
- **Step 7:** Double-click the database file to reopen it in DEVONthink.

If this does not resolve the issue, please contact our support team.

OVERFILLING A DATABASE



If you are using an encrypted or *revision-proof* database, you define the maximum size it can grow to when you create it. This is a hard limit, no different than the size of the internal disk on your Mac. Finite space can't hold infinite documents, so you need to be aware of how much space you have available. If you add more data than it can hold, you will receive errors in the *Log* window of popover.

If you run into this situation, please contact our support team.

Another thing to be aware of, there needs to be enough space available to do maintenance, like a database rebuild. To keep an eye on the space, periodically select it in DEVONthink, then choose *File > Database Properties*. At the bottom of the statistics you will see the space consumed and the available space to work with.

SYNC ISSUES

DEVONthink's synchronization was designed to run in self-maintenance mode. If you are having issues syncing your DEVONthink databases, the first place to look is Windows > Log. Most sync related errors and reports will be shown here.

Below we cover some things you can check for the type of sync method you're using as well as some common questions you may have.

THINGS TO TRY FIRST

Here are a few simple things to try when you have a sync issue:

- Check your network connections, including trying to log into a remote service.
- Reboot the computer
- For non-Bonjour and non-iCloud sync locations, make sure you're entering the correct store name. When logged into a remote service, the *Sync Store Name* dropdown should list available sync stores to choose from.
- Make sure you're using the correct encryption key for the sync location.
- Make sure you have sufficient space for sync data when syncing using cloud accounts.

VERIFY & CLEAN

Verifying: If there is an issue reported with syncing, e.g., broken structures or missing manifests, you should first verify the sync data to see if it's intact and consistent. The results of a verification will be reported in the log window.

Cleaning: If the verification fails, you can then clean the sync location or database to remove the sync data in that location. The results of the clean will be reported in the *Log* window. After a successful clean, you can upload the database(s) again. And just to ease anyones' mind, cleaning a sync location has no effect on the local databases on your devices. Sync data is not your database and is separate from the local databases on your devices, Mac and mobile.

Before you clean sync data: Isolate one syncing device and do the maintenance there. Before you do, disable the sync location or specific database on the other syncing devices. After the clean and resyncing is finished, you can then enable the sync location on the other devices again.

To verify or clean sync data, open *Sync* settings. These commands are essentially the same but are applied to either an entire sync location or a specific database.

- **Sync Location:** To clean or verify all the sync data from a specific location, Control-click it and choose the appropriate command. For a verification, hold the ⌥ Option key and choose *Verify Location Thoroughly* to perform a deeper verification of the sync data. For a remote sync location, there may be a pause while a connection is established.
- **Database:** To clean or verify the sync data for a specific database, select the sync location to display the databases list. Control-click the specific database and choose the appropriate command. For a verification, hold the ⌥ Option key and choose *Verify Database Thoroughly* to perform a deeper verification of the sync data. Repeat this with any databases, as needed.

Both these actions can be used at any time, for preventative purposes or just to get a fresh start with syncing. Also, you may see unwanted databases in the *Remote* section of the databases list for a sync location.

Cleaning the location will remove these databases too. But if you want to keep the sync data for your current databases, you can Control-click and clean specific databases in the *Remote* section.

BONJOUR

Bonjour syncs are generally transparent, but it can only be used on a local network that allows Bonjour traffic and non-standard ports. Many public networks disallow this kind of traffic to protect their customers. Also, corporate networks will often disallow this traffic for security reasons.

> Note: Bonjour connections cannot be used over VPN. This is technologically infeasible, at least at the moment.

- Make sure you have entered the correct Bonjour password that you set in the server Mac's *Bonjour options*.
- Make sure DEVONthink is running on the other Mac or iOS device and both devices are awake.
- Make sure only one device is acting as the Bonjour server for a given database. You should not have two devices with incoming connections enabled trying to serve the same databases.
- Make sure the databases you want to synchronize are open on the other Mac, or enable *Settings > Sync > Bonjour Options: Open databases automatically* on the server Mac.
- Restart the other Mac, the iOS device, or both.
- Make sure this computer is connected to the same network as the other syncing device.
- Make sure any firewalls or applications like Little Snitch are allowing traffic from DEVONthink.
- Check if there are any routers or switches involved. The more switches and routers the less reliable the connection due to port filtering, conflicts, or other unknown factors.
- Restart your router.

If you find yourself on a network that disallows Bonjour syncing, it is possible to connect your iOS device to your Mac via your Lightning cable. This creates a simple ad-hoc network that will allow Mac-to-mobile syncing. If you are in a corporate situation, please discuss this with your IT department to ensure you're not violating any security policies. They may also issue an exception for a specific port you could use for Bonjour syncing. If they do, you'd enter it in the *Port* section of the Bonjour options.

ICLOUD

Since your devices are generally signed into your Apple ID, using iCloud for syncing is the easiest to set up. However, it should be understood it can only be used for personal syncing. Collaborative syncing is not possible unless all participants are sharing an Apple ID.

If you are using an *iCloud (Legacy)* sync, the data is synced locally first. iCloud processes will then upload the changes to Apple's servers and propagate the information about it to all other devices. It generally happens smoothly and in the background but it means you can't expect the changes to be ready on other devices as soon as DEVONthink has

finished synchronizing to iCloud. If you are using a *CloudKit* sync, DEVONthink deals directly with Apple's servers.

Here are a few things to check:

- Make sure you have enabled *DEVONthink* in *System Settings > iCloud > iCloud Drive > Apps Using iCloud* on each device.
- Make sure all syncing devices are logged into the same Apple ID.

> Note: Be aware iCloud can stall. This is a sporadic, but documented, issue that can cause your devices to get out of sync. This is not under our control, nor can we even detect or anticipate it.

WEBDAV

Our support for WebDAV services allows you to use cloud services that are WebDAV-enabled. This also presents some self-hosting opportunities, even with some NAS devices. However, they can sometimes be technically more difficult to implement. Here are some things to check:

- Make sure the service or device you're trying to connect to is reachable. This is especially true when self-hosting. If you see errors in the 500 range in the *Log* window, it's a problem at the server.
- Make sure you are using the proper protocol in the URL, `http://` or `https://`.
- Make sure the URL is complete. This will be specific to the device or service you're using. If you're running your own WebDAV server, you should set up a folder shared by WebDAV as the location for your sync data. For a Synology NAS, for example, you have to add the target volume to the path (a valid URL would look like: `http://diskstation.local:5005/DTSync`). Be aware the folder name is case-sensitive, so `dtsync` is not `DTSync`. Refer to the service or manufacturer's instructions for the proper URL construction.
- Make sure you have entered your user credentials correctly. If you see 400-series errors, there is an issue with your authorization.

> Note: WebDAV implementations vary so it's not possible to guarantee compatibility in all situations. For self-hosting, Apache implementations are the most compatible.

DROPBOX

Dropbox is our longest supported sync method and is generally reliable and a good performer. However, there are a few things to consider.

According to Dropbox' rules, you cannot sync across user accounts. They don't allow you to share the *Apps* folder or its subfolders between accounts. Also, they only allow our sync engine to be logged into one Dropbox account at a time. If you have a work and a personal account, you can only sync to one with DEVONthink.

- Log into your Dropbox account to make sure it's reachable. If you see errors in the 500 range in the *Log* window, it is a problem with the remote server.
- Make sure you are connected to the correct Dropbox account. The active account will be shown under the sync location's name in the sync preferences.

Collaborative syncing may be possible using a common Dropbox account, i.e., using the same username and password for syncing. But again, you can only sync to one active Dropbox account at a time.

COMMON QUESTIONS

I enabled the sync and nothing's happening: Our sync engine will not sync, upload or download, without being told to. We believe in opt-in processes whenever possible. Merely enabling a sync location just sets up a location to be ready to receive and transmit data. You need to enable individual databases to sync. You also need to do this on each device you want to sync. If you have enabled databases to sync, check *Window > Log* for errors.

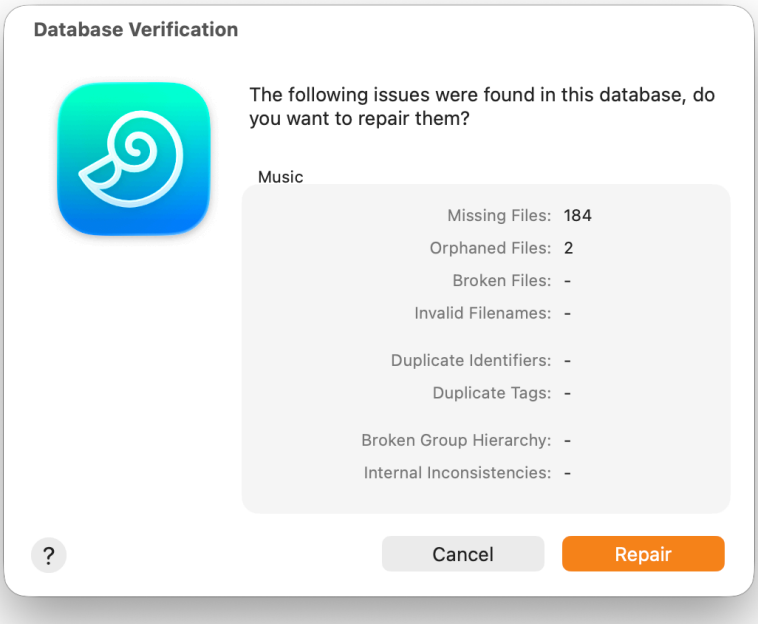
I'm seeing a message about an invalid encryption key: When you set up a sync location, you have the option of entering an encryption key. This is used to scramble and descramble the sync data so it's stored in an encrypted state. Once you've synced the first time, this value, even if you aren't specifying a key, is stored for that sync location. This value must be entered on other devices syncing with this sync location.

You can't add, remove, or modify the encryption key value for a sync location after the first sync. If you want to make a change, you must clean the sync location first. Disable the sync on all devices but one, then clean the location. After the clean, Control-click the sync location again, choose *Show Info*, and make the modification to the key. After the first sync, this will be the value stored for the location. After the clean and resync from the one device, you must change the value on the other syncing devices, then re-enable their syncs.

I am seeing a message about missing manifests: Missing manifests are bits of transactional sync data that cannot be located by the sync engine. When this occurs, it can't validate the information about what has been synced. This is not an issue with the databases; it's missing sync data. See the Verify & Clean section above regarding verifying and cleaning the sync data.

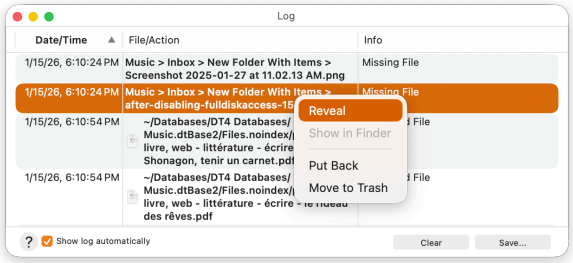
It's telling me I have a duplicate database UUID: As noted in the glossary, a UUID is a unique value given to all DEVONthink databases. If you copy and rename a database file in the Finder, this UUID is preserved and DEVONthink sees two databases with the same UUID. This will not sync correctly. Please contact our support team for assistance on resolving this.

REPAIRING A DEFECTIVE DATABASE



DEVONthink databases are packages containing your files and the indices containing metadata, thumbnails, etc. These package files are normally robust and trouble-free but problems sometimes can arise. If your database starts behaving strangely, or if DEVONthink finds inconsistencies during start-up, it is time for some housekeeping. In this section we look at the most common issues and their usual causes, followed up by explanations of the maintenance commands in the *File* menu.

MISSING AND EMPTY FILES



All documents in a DEVONthink database have a path the file system where their content file is located. This path is stored for every document, imported or indexed. If DEVONthink can't find a file at a path stored in its index, it will be reported as missing.

The most common causes of missing files are: indexed files being moved in the Finder, the indexed parent folder being renamed, or the indexed parent being moved. In the first case, the file isn't in the location it was indexed from. Moving the file back into place will resolve this issue. In the second case, the path no longer exists as the names in the path have changed. Changing the name back will resolve this. For the third case you may have had to relocate the folder for space or other organizational reasons. Select the indexed parent group in your database and open the *Generic Info* inspector. Click the dropdown arrow next to the *Path* field and choose *Select*. In the Open dialog, locate the indexed folder in its new location and press the *Choose* button. DEVONthink will update the paths for the contents of the folder in its new location.

Regarding indexed items, it's also possible for out-of-date items to be reported as missing, especially in cloud-synced locations. Remember that items indexed in cloud-synced locations may require a manual update via *File > Update Indexed Items* since a filesystem event may not be triggered by the cloud software. Also DEVONthink tries to make sure it doesn't cause any conflicts with those applications.

The second most common cause of missing files is people modifying the internal contents of a database. Some Finder replacement applications, like PathFinder, allow you to access package files like normal folders. The internals can also be accessed by other methods, like the command line or the Finder's context menu. If you delete or reorganize anything, you can easily cause missing files.

Empty Files: Empty files, also known as zero-byte files, are just that: files with no content and listed as having zero bytes for the file size. DEVONthink is aware of certain file types that can legitimately have empty files, but will report ones that can't, e.g., images. These aren't very common but are sometimes caused by a crash, incomplete file transfers, or temporary files created by some applications. They are handled in the same way as missing files.

Dealing with missing or empty files: Missing files are reported in DEVONthink's *Window > Log*. To deal with these files, Control-click the item in the Log window and choose one of two options:

- **Reveal:** Reveals the item in the expected location in the database. If the *view/edit* pane is visible, the expected file path is shown beneath a document thumbnail. This path is especially useful when dealing with missing indexed files as it shows the path in the Finder from which the file was indexed. If the path shows the file inside a *Files.noindex* directory, you may use the following option if the file is of no concern or contact our support team.
- **Move to Trash:** If the missing file is of no value to you, this command moves the file to the database's Trash. Then choose the *DEVONthink > Empty Trash* command to completely remove the file from the database.

ORPHANED FILES

Just as with any database application, controlling the data flow in and out is a critical process. DEVONthink should be the gatekeeper of the files in its databases. If an external agent, whether an application or a user, adds files outside DEVONthink, they will cause an internal inconsistency and lead to orphaned files when following the steps below.

The most common cause of orphaned files is a simple and common one: attempting to create revisions. Say you open a file, a Word document, in an external application. As you are reading it, you decide to make some changes. You type your edits, and select *File > Save As* (or *File > Duplicate* the file first). The application most commonly will open the *Save* dialog in the location of the original file, in this case, inside the internals of the database. You have just created an orphaned file DEVONthink knows nothing about. So the question becomes, how do I create a revision without causing this issue? One simple way is...

- **Duplicate:** Duplicate the item in DEVONthink first.
- **Rename:** Rename the duplicated item. This can be quickly done by immediately pressing ↩ Return, typing the change, then pressing ↩ again.
- **Open and Edit:** Now you can open the new file and make your edits.

The other common cause is the same as with missing files: getting into the database package and adding files manually.

> Note: Modifying the internal contents of a database outside DEVONthink is unsupported behavior and can lead to broken or inconsistent databases. You should only get into a database's internals when instructed to by our support team.

PENDING FILES

You may see a message in the *Log window* about "n items to be uploaded" or you may see a  icon to the right of an item's name. These are pending, meaning the metadata for the item is in the database but the content is not. As this is something that can propagate to other devices, it shouldn't be ignored.

A common cause is indexing files and syncing while the files aren't available. For example, indexing files on a connected hard drive then ejecting the drive or indexing cloud synced files that have been evicted from the local machine by the cloud service. Syncing while the content is unavailable pushes only the metadata from the database. This means another device, Mac or mobile, won't have contents available to download, leaving them with pending files. This also should underscore why it's important to read and understand the In & Out > Importing & Indexing section before committing to it.

To address this, start with a toolbar search for `item:pending` in your database to help isolate the files. If none, are found, try emptying the trash in DEVONthink. If any pending files found and you don't need them, move them to the databases' Trash and empty it. Also, make sure the indexed files are available, whether in your cloud-synced folder or by connecting the volume from which you

were indexing. You may need to select the indexed parent and choose *File > Update Indexed Items* to reconnect them with their contents.

If needed, check the database on other devices to see if the items are intact. If they are, you could put them on an external drive and replace them in the affected database. In the worst case scenario, you would need to restore from your backups.

FILE INTEGRITY

Another report you may see in the Log window is regarding file integrity. DEVONthink scans and stores a checksum for each file in a database. This value is updated as the files change. However, if you use the utility command *File > Check File Integrity*, it may report an integrity error. This means the stored checksum doesn't match the newly scanned checksum. This may indicate a problem with the file itself. However, this error will also be reported for indexed items that are not up to date. Using *Files > Update Indexed Items* may resolve the issue with indexed files.

XLS Files: Though much less commonly used but still prevalent in legacy files, Microsoft `.xls` files will report a checksum error after you've opened and closed them, even without modifying the document. Converting these the newer `.xlsx` format is recommended.

We will now look at the maintenance options available, from the simplest health check to trying to recreate a damaged database.

VERIFY & REPAIR

One of the first options to explore is *File > Verify & Repair Database*. This checks a database's consistency to ensure it's healthy. If prompted there are problems, press *Repair* and DEVONthink will try to correct it. It will report missing files and import orphaned ones. But be aware this will not fix missing or empty files. That is handled as described above.

If *Verify & Repair Database* was able to repair your database, use *File > Optimize* to optimize your database and have DEVONthink create an internal copy of the index.

> Note: Verify & Repair isn't just for emergencies. Running this command on an occasional basis is not a bad idea. In fact, if you're a fairly heavy user of DEVONthink, running it weekly or bi-weekly does no harm. It's just a routine checkup.

REBUILD YOUR DATABASE

A deeper maintenance routine, a database rebuild is typically used with more serious database errors, e.g., with reports of file errors. It can also be used when searches, classification, etc. are clearly and consistently behaving erratically.

To rebuild the database from scratch, use *File > Rebuild Database*. During the rebuild process, your files are exported and reimported, recreating the internal index afresh. You should not interrupt this process or let the machine power down while it's working. And for safety, a new restore point

is created at the beginning of the rebuild process. A progress report or errors can be viewed in the Log window or popover.

The *Rebuild* command won't be available if a database is actively syncing. Also, bear in mind you'll need to have sufficient hard drive space to do a database rebuild. While DEVONthink uses clever mechanisms to reduce overhead and disk usage, you should still be mindful of the available disk space. This includes when you're dealing with an encrypted or revision-proof database. If the *Rebuild* command isn't enabled, you may have insufficient disk space to run it. Try emptying the database's Trash and recheck if the command is enabled..

RESTORE INTERNAL BACKUPS

DEVONthink doesn't do file backups but does an internal metadata backup for support purposes. Weekly, it creates a copy of a database's metadata, saving it as a restore point. Only two restore points are kept, with the oldest one being purged.

A less frequently used mechanism, it can be useful after a crash, especially if the crash occurred during a drag and drop of a large number of items between databases. When the database is opened and appears to be empty, restoring an internal backup could resolve this with a few mouse-clicks.

To restore the metadata files from a previously saved internal backup, hold the ⌥ Option key and select *File > Restore Backup*. DEVONthink presents you with a list of all available backups. Choose the latest one or the one with a size that appears to be correct and click *Open*. This swaps the current set of metadata files with the chosen backup metadata (the current set becomes the backup, the backup becomes the current set) so that data is never overwritten. Run *File > Verify & Repair* to ensure everything is healthy. If everything looks good, you can manually use *File > Optimize* to optimize your database create a new restore point.

RECOVER OR MANUAL REBUILD

If your database is constantly crashing, it's possible it is – or is becoming – damaged. In this case, there are two options to consider:

Restore From Backups: Restoring a database from your external backups is usually a quick and effective way to get back up and running. As noted in the linked section, if your data is important to you then diligent backups should be high on your priorities.

Manual Rebuild: If you find yourself in the unfortunate situation where you have no backups, it may be possible to rebuild a damaged database manually, following these steps:

- Locate the database (`.dtBase2` file) in the Finder.
- Rename the file by adding, e.g., an `x` to the beginning of the name.
- Control-click the database and choose *Show Package Contents* in the context menu.
- Copy the most recent `backup` folder where your database is located.
- Copy the `Files.noindex` folder into the copied `Backup` folder.
- Rename the copied `Backup` folder to the previously used name and add the file

extension `.dtBase2`, okaying the extension when prompted.

- Double-click the new database file to open it in DEVONthink.
- Use *File > Verify & Repair* to ensure that the database is operating properly.

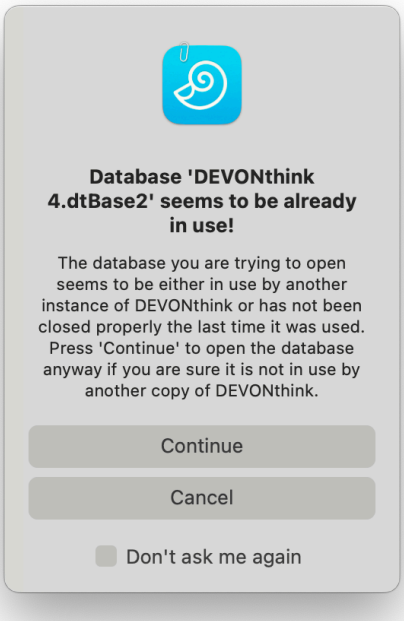
RECOVER FILES

In a worst case scenario, if you do not have a current backup of your documents and a manual rebuild didn't work, you can rescue your files manually, but you will lose any group structure. To manually copy your files from the defective database, show the database package in the Finder, Control-click it, and choose *Show package contents* from the context menu. Copy the `Files.noindex` subfolder to a safe location, e.g., the desktop. If you look inside the folder, you will see a series of subfolders — one per file extension, e.g., `.rtf` — with subfolders in each. Your imported documents are stored within those. It is possible to create a new database and import this folder but you will have to rebuild the database's structures and apply any metadata again.

CONTACT SUPPORT

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

CRASHES AND STALLS



DATABASE WARNING

You may have seen the warning dialog above. Except in specific circumstances, it's not usually the database being opened simultaneously. Instead it occurs most commonly after a crash or a force quit. When you see this dialog, press *Continue*. The database will be automatically checked to ensure it's consistent and healthy and you will be prompted if there are issues. If there are none, you may not see anything happen. Select *File > New Window* or press ⌥⌘N to open a new window and you're back to work!

CRASHES AND STALLS

As much effort as we put into building a stable and robust application, the variables involved make a "perfect application" impossible. Even changes made by Apple can cause occasional unexpected behavior. If you

have a consistently repeatable crashes or stalls, please report it to us. But please try to reproduce the crash or stall before reporting it.

Crashes: A crash is an unexpected termination of the application. You're working and suddenly you're looking at your desktop.

If DEVONthink crashes but you can relaunch the application without incident, hold the ⌥ Option key and choose *Help > Report Bug*.

If DEVONthink crashes on startup, there is no opportunity for you to use our bug reporting mechanism. However, you can manually retrieve the crash logs:

- In the Finder, hold the ⌥ Option key and select *Go > Library*.
- Open the `Logs/DiagnosticReports` folder and locate the most recent crash report for DEVONthink. (The date and time is in the filename.) Drag it to your desktop.
- Open a support ticket and attach the crash log as well as details about what you were doing at the time of the crash.

Stalls: Sometimes known as "beachballing", "the rainbow cursor", or the "pinwheel of death", it accompanies your application not responding to mouse-clicks or a frozen interface. Certain actions can sometimes cause this, e.g., indexing files on a networked volume or adding a very large volume of documents at once. Make sure to give the application a little time to work. You should not rush to force quit the application, ever. But if the stall goes on for a sustained period of time, say over five to ten minutes, then you may need to, but again, this depends on what you were doing that precipitated the stall. Before you force quit, please follow these instructions:

- In the Finder, do a Spotlight search for `Activity Monitor`.
- Select our application in the list of processes — it should show `(Not Responding)` with the name in red.
- Press ⌥⌘S to run a process sample on it.
- When the sample window opens with the report, press the *Save* button and save it to your Desktop.
- Use our bug reporting mechanism or the support ticket link mentioned above and attach the stall report along with a description of what was happening at the time of the incident.

PROBLEMS USING SERVICES

WHY DO THE SERVICES MENU COMMANDS SHOW NO SHORTCUTS?

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

WHY DO SPECIFIC SERVICES NOT APPEAR IN THE MENU?

The operating system relies on information supplied by the current application to determine which services should be shown in the *Services* menu. For some applications, often those developed for both Mac and Windows, this information may not be what's anticipated. When this occurs, certain services may not be present. For example, selecting text on a web page in Firefox will display the service *DEVONthink: Take Plain Note*. The same text on the same page in Safari will show that option as well as *DEVONthink: Take Rich Note*.

SLOW FINDER DIALOGS

If you find the Open or Save dialog in applications on your Mac are opening or performing slowly, it may be that you have too many tags in your system. Having 5000 tags or more in your filesystem can cause the Finder to stall as it tries to process them.

As noted in the Finder Tags and Tagging Sources subsections, tags can come from several sources. These tags can also be added to your Finder tags, perhaps unknowingly.

Tags are added to the Finder tags from DEVONthink in one of three ways:

- **Spotlight Index:** In the Database Properties popover for a given database, there is a *Create Spotlight Index* option. If this is enabled, DEVONthink includes tags as part of the Spotlight metadata, enabling you to use Spotlight searches like *tags:support* in the Finder. However, this also adds to the tags processed by the Finder. If you disable the Spotlight index for a database, the tags for that database will immediately be removed from the Finder tags,
- **Indexed files:** If you're indexing files, any tags you apply in DEVONthink are automatically applied to the files in the Finder.
- **Exporting files:** If you export files to the Finder, the tags are added to the Finder tags as they're part of the metadata of the files. The exports include using the File > Export > Files and Folders command, drag and drop from DEVONthink to the Finder, or doing a File > Rebuild Database.

Regarding the last two items, you can prohibit DEVONthink from exporting tags to the Finder. Disable *Export Tags* in the *Files > Tags* settings. Note this is a global setting, affecting all databases. Also, disabling this option will not remove already exported tags from the Finder.

Deleting tags in the Finder: While disabling the Spotlight index for a database will immediately remove Finder tags from the system, the other options will not.

To manually remove tags, in the Finder press ⌘, to open the settings. Select the *Tags* view. Here you will see a complete list of Finder tags. Select the tags you want to remove and press the minus button. You will be prompted to approve the deletion. Note: This does not remove any files. It only removes the tags.

AUTOMATION

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Automation. No matter how efficient we are, there is always some process that could be done more quickly, and sometimes more accurately. This may be as simple as renaming a file, or as complex as filing, emailing, and archiving. While not everything can be automated, and careful thought should go into your automation plans, DEVONthink offers a level of automation capabilities rarely rivaled in other Mac applications.

AppleScript: Recognizing the need for effective real-world automation, DEVONthink has extensive support for AppleScript. Not only used in the scripts you can install from *DEVONthink > Install Add-Ons*, they are also at the core of several pre-installed templates. Additionally, in conjunction with other AppleScript-enabled applications, the potential for automation on your Mac is extraordinary. This mature but easy to learn technology is the one we will focus on. See also p. 269ff

Smart Rules and Batch Processing: DEVONthink also offers two for those with little to no programming experience: smart rules and batch processing. Smart rules are conceptually similar to smart groups but allow you to run pre-defined smart actions when certain events happen. Batch processing also uses smart actions but works on selected items for more impromptu automations and also allows you to save often used configurations. The variety of smart actions available makes them accessible to all users, while still providing other powerful options. This includes smart action scripts. See also p. 276ff

AI Assisted Automation: If you are using an AI model in DEVONthink, there are some automation options available to you. Whether you're asking a question or examining a document, it's possible to leverage artificial intelligence in ways not possible before now. A pair of smart actions for batch processing and smart rules, as well as some new script commands, help integrate an AI engine into your processes. See also p. 281ff

Smart Templates: Templates are an often overlooked feature in DEVONthink, providing a way to create reusable documents to be added on demand. But beyond simple document templates, there are more capable templates you can create: powerful templates, including ones driven by scripting, that will create entire group structures, import items, accept user input for dynamically created items, and more. See also p. 287ff

Item Links and URL Commands: While not an automation technology in itself, item links and URL commands are item-specific identifiers in DEVONthink that can be used in automation. Item links provide a way to refer to files by a unique and unchanging value while URL commands can initiate certain actions, like starting a search, while outside of the application. See also p. 294ff

JavaScript: In addition to AppleScript, JavaScript for Automation (JXA) is supported. We advocate AppleScript for its ease of use by new and less-experienced programmers but if you prefer to code in JavaScript, you certainly can.

On a side note, our AppleScript dictionary supports the *do JavaScript* command. With it you can interact with web-based content viewed in a DEVONthink window. With a bit of creativity, some pretty amazing things can be done!

AppleScript Objective-C: Sometimes referred to as "ASOC", this is a powerful hybrid of the two languages. As it's not very accessible to many lay-coders, we don't generally recommend or publish scripts solely written in it. However, as DEVONthink is a native macOS application, you surely can use use ASOC in your scripts, if you're inclined to use it.

Terminal: For those who are into other technologies, like Python, bash, Ruby, etc., the question arises: Is there a command line interface (CLI) for DEVONthink? The answer is no. However, you can still use a *do shell script* command in AppleScript when needed. Actually, the combination of the shell and AppleScript creates even more opportunities, as their individual strengths compensate for the other's weaknesses.

APPLESCRIPT

AppleScript is an automation technology introduced by Apple in 1993. Over the years it has matured and become the friend of many Mac users wanting to exert more control over their computing experience. Written in an easy to learn, almost conversational language, it offers a tremendous amount of power with less effort than many languages. DEVONthink has very robust AppleScript support and comes with many built-in scripts. These, and those you write or obtain, make it possible to automate nearly every aspect of the application, and to integrate the application with almost every other macOS application that supports AppleScript.

INSTALLATION

Add-On Scripts: All add-on scripts that come with DEVONthink are automatically installed or updated when you open a new version of DEVONthink for the first time. You can, however, manually (re-)install them

by choosing *DEVONthink > Install Add-Ons*. The scripts from this panel are installed in a number of locations:

- **Script Menu Extra Scripts:** These scripts are accessed from the global *Script* menu when you are in specific applications, e.g., Safari. They are installed in an application-specific subfolder of `~/Library/Scripts/Applications`. See also p. 290ff
- **Folder Action Scripts:** These scripts are used to created hot folders in the Finder. They are installed in `~/Library/Scripts/Folder Action Scripts`. See also p. 291ff
- **Apple Mail Rule Scripts:** These scripts are for use with Apple Mail Rules. They are installed in `~/Library/Application Scripts/com.apple.mail`. See also p. 289ff

DEVONthink Scripts: The internal scripts found in DEVONthink's *Scripts* menu are installed in `~/Library/Application Scripts/com.devon-technologies.think`. The scripts will be found in one of four directories:

- **Menu:** These are the scripts found in DEVONthink's *Script* menu. See also p. 274ff
- **Toolbar:** These scripts are available to add as toolbar buttons. See also p. 276ff
- **Reminders:** These scripts will be executed when a reminder is triggered with an alarm of *Execute External Script*. See also p. 275ff
- **Smart Rules:** These scripts are used as *External Scripts* in the actions of smart rules. See also p. 276ff

Additional scripts, like those you write yourself, can be put into any of these folders to be used in these contexts. Other scripts that may include integration with DEVONthink can be located wherever it's convenient.

SCRIPT SHORTCUTS

Many people like mousing around their applications, while others like to use their keyboards. If you want to add keyboard shortcuts to scripts in this menu, you have two options:

- **System Preferences:** Open *System Settings > Keyboard > Shortcuts > App Shortcuts*. Add a shortcut for DEVONthink, enter the *exact* name of the menu item, and assign a hotkey.
- **Append Filename:** Locate the script in the Finder and append three underscores followed by abbreviated command keys and characters. For example, `eMail Current URL___Cmd-Alt-F2.scpt`. The command key abbreviations are as follows: `Cmd` stands for ⌘ Command, `Alt` or `Opt` for ⌥ Option, `Ctrl` for ^ Control, and `Shift` for the ⇧ Shift key.

LEARNING APPLESCRIPT

While this documentation is not an AppleScript language guide, all the scripts that come with DEVONthink are editable and can be explored or modified as you see fit. The separate sections in this chapter provide any required terminology and a simple example script or two. Additionally, there are some great resources available online and in print. For the official archived

documentation, refer to Apple's AppleScript web site. Some additional resources are listed below:

Online:

- DEVONtechnologies Community
- MacScripter
- AppleScript, the Language of Automation

Books:

- AppleScript: The Missing Manual
- AppleScript: The Definitive Guide

> Note: When using more modern versions of macOS, you will be prompted by the operating system to allow DEVONthink to "control" other applications. If you've seen such a prompt and didn't allow it, open *System Settings > Privacy & Security > Automation* to enable it. Please make sure to allow the automation requests for DEVONthink to ensure your scripts will run successfully.

BASIC APPLESCRIPT TERMINOLOGY

AppleScript is not a difficult language to learn. Its plain English approach of "talking" to applications and elements is easily understandable. However, like any language, there are some variations in the words you can use; dialects, if you will. AppleScript is implemented by the developer of an application, so the commands and parameters may be conceptually the same as another application's, but using a different term. This is certainly not meant to be a complete guide to AppleScripting DEVONthink, but what follows are some common terms or concepts you're likely to encounter. The examples here and in this chapter are meant to give you basic ideas about scripting DEVONthink.

TALKING TO DEVONTHINK

In AppleScript you "talk" to programs like DEVONthink using a `tell` statement, typically referring to an application either by its name, `"DEVONthink 4"`, or its bundle identifier, `"com.devon-technologies.think"`. While these forms will work, we strongly recommend to talk to DEVONthink using the application ID `DNtp`, as seen in the following statement:

> **Example:**
```
tell application id "DNtp"
	close current database
end tell
```

DEVONTHINK'S DICTIONARY

AppleScript-capable applications have their commands, elements, and properties listed in an AppleScript dictionary. DEVONthink includes a large dictionary as a great reference for you. To view the dictionary, open the Script Editor application, select *File > Open Dictionary* and choose DEVONthink in the appearing window. You can also add DEVONthink to your Script Editor library. Select *Window > Library*, click the + button and choose DEVONthink. This way you keep DEVONthink's dictionary at hand.

Note: Using `the` in your script is optional, but including it can make the script seem a bit less robotic. You can also use possessive

forms, if they feel more comfortable to you. For example, all the lines in this script are functionally the same:

> **Example:**
>
> ```
> tell application id "DNtp"
> 	set flag of children of current group to true
> 	set the flag of the children of the current group to true
> 	-- Possessive Forms
> 	set the flag of the current group's children to true
> 	set the current group's children's flag to true
> end tell
> ```

As noted above, the dictionary is the best place to find specific terminology to be used with DEVONthink.

Again, this isn't a course on AppleScript, but there are a few DEVONthink-specific things you should understand when scripting our application.

Records: Almost every item in a DEVONthink database is a record, a record with properties. Do a search for "record" in the dictionary and you'll see it's a fundamental unit with a wide range of properties associated with it. This means you won't be writing code like, `get the second rich text file`…. You will be dealing with records with a particular type, in this case `rtf`.

There are many commands specifically for use with records: `create record with`, `exists record with`…, etc. Also note there are some commands that require the term `record`. For example: `move`, `delete`, and `convert`. You will see a dictionary listing `move record`, so you can see the command isn't merely `move`, it's `move record`.

Parents and Children: Another concept to understand is parents & children. Generally speaking, these classes deal with the container or the contents of some object. The `parent` of an object is the group containing it. The `children` of a group are the immediate contents of that group. It does not include the children of sub-groups. Children can be documents or groups; parents can only be groups, tag groups, or RSS feeds.

> **Example:**
>
> ```
> tell application id "DNtp"
> 	set thisGroup to current group
> 	name of (the children of thisGroup whose (type is XML))
> end tell
> ```

DEVONTHINK WINDOWS

While there are standard windows in DEVONthink, it is better to refer to them by their proper classes. A `document window` (or `content window`) is a standalone document window. A `main window` (or `viewer window`) is a main window. However, they are both subsets of the `think window` class so it's often useful to use this term to cover either case.

USING LOCATIONS

One of the common tasks people want to perform with AppleScript is importing files to a specific group. In order to direct the files to a given location, you need to reference it properly. Below are three general options for choosing a location:

- **incoming group:** This targets the Global Inbox, or the inbox of a database when

using `incoming group of current database`.

- **current group:** This targets the currently selected group in the current database.
- **display group selector:** This shows the group selector so you can choose a location on demand.

There are many times you want to direct files into a specific group. That group may not be the current group you're in and you may not want to choose a destination each time. Here are two common ways of specifying a particular group in your database to be a destination group in your script:

- **get record at...:** This command allows you to set a variable by specifying a group's location in your group structure. The location is a text string, always beginning with a forward slash denoting the root of the database.
- **get record with UUID...:** When using an *item link*, you can use the alpha-numeric string from the reference URL to point to a specific item. (This command works with both groups and documents.) This form is very useful since it doesn't change when an item's name or location changes.

Example:

```
tell application id "DNtp"
	set myGroup to get record at "/Inbox/New Files"
	import "~/Desktop/001.txt" to myGroup
	set groupTwo to get record with uuid ¬
		"98BBF96D-7743-46C6-9EB4-51C6EF68373C"
	import "~/Desktop/002.txt" to groupTwo
end tell
```

WORKING WITH A SELECTION

Many times you want to process items you have selected in DEVONthink. What class you use depends on the selection.

- **selected records:** Use this term when items are selected in the item list.
- **root of think window:** When a group selected in the *Navigate* sidebar, it is not the "selection". It sets the `root` of the window.

As a practical example of working with a selection, imagine you want to generate a list of names and dates for use in a document you're working on. Below is a handler commonly seen in DEVONthink scripts:

- **repeat with thisRecord in (selected records) ... end repeat:** This is a very common handler, used when processing a selection, single or multiple items.

Example:

```
tell application id "DNtp"
	if selected records is {} then return
	set nameList to {}
	repeat with thisRecord in (selected records)
		copy ((name of thisRecord) & ": " & ¬
			(creation date of thisRecord as string) & return) ¬
			to end of nameList
	end repeat
	create record with ¬
		{name:"Files", type:text, content: (nameList as string)} ¬
		in incoming group
end tell
```

If you have external AI set up and a code-compatible model, you can use DEVONthink's Script Assistant. Choose the AI model and enter a description of the desired script in the prompt field, then press the ↩ Return key to compose and refine a script.

INTERNAL SCRIPTS

The *Scripts* menu of DEVONthink, located to the left of the *Help* menu, gives you access to a large number of pre-made scripts, with more scripts available. These scripts are not only useful for every day use, but are also great for learning how to script DEVONthink.

All the scripts we provide are editable using the Apple's Script Editor, though we do suggest making copies to work on. They are located in `~/Library/Application Scripts/com.devon-technologies.think/Menu`. Open this folder in the Finder with *Scripts > Open Scripts Folder* command. Add your own scripts to the menu by adding them to the appropriate subfolder in this directory, even creating subfolders of your own.

A complete listing of the installed scripts is in the Appendix.

SCRIPT LOCALIZATION

If you need to support multiple languages in your scripts, it is possible to vary the content of messages based on the language in which DEVONthink is running.

You must have saved your script as a script bundle, a `.scptd` file. In the `Contents > Resources` directory of the bundle, add a folder with the two character country code for the language, followed by `.lproj`, e.g., `fr.lproj` would contain French strings. Add your own definitions in a `Localizable.strings` and put it in this directory. Define a word or phrase in your language, followed by the translated phrase. For example, in a strings file in a `de` subdirectory, enter: `"This is a new day!"="Heute ist ein neuer Tag!";`. In your script, you'd enter a command like, `display alert (localized string "This is a new day!")`. If DEVONthink is running in German, you'd see the German message.

Localization is also available for smart templates. See the Template Localization section later in this chapter.

TRIGGERED SCRIPTS

Triggered scripts are AppleScripts that you attach to an item in DEVONthink (a group or document). Instead of being bound to a set interval like a reminder alarm, these scripts are executed every time you select the item. Such a script could change some metadata, force an update of indexed items, or many other habitual actions you may need to perform. So with some creativity and a bit of scripting, you can add your own custom behaviors when interacting with items in your database.

Items with attached scripts show an AppleScript property icon behind their name. And a toolbar search for `item:scripted` will show you items with attached scripts.

Triggered scripts can be stored anywhere, but are typically located in a folder within the `~/Library/Application Scripts/com.devon-technologies.think/Menu`

directory. Adding or removing a triggered script from an item in DEVONthink is done via scripting, using the `attached script` property for a selected record. Here is a code snippet you can use to attach scripts to selected items:

Example:

```
property dtScripts : (POSIX path of ¬
	(path to library folder from user
domain) & ¬
	"Application Scripts/com.devon-
technologies.think/" as string)
tell application id "DNtp"
	if (selected records) is {} then
return
	set chosenScript to choose file
with prompt ¬
		"Choose a triggered script
to attach to the selected item:" ¬
		default location dtScripts
of type {"scpt", "scptd"} ¬
		without multiple selections
allowed
	repeat with theRecord in (selected
records)
		set attached script of
theRecord to chosenScript
	end repeat
end tell
```

TERMINOLOGY

Triggered scripts are defined by a specific handler: `on triggered(var)`, where `var` is the variable representing the item the script is attached to.

Example:

```
on triggered(theRecord)
	tell application id "DNtp"
		display alert "" & (name of
theRecord as string)
	end tell
end triggered
```

REMINDER SCRIPTS

Reminders have several pre-built alarms available for notifications. Reminder scripts are AppleScripts run by an alarm set on a specific reminder for an item. By using or writing your own, you can extend notification possibilities of your reminders. Bear in mind, you can only specify one alarm per reminder.

ADDING AN EXTERNAL SCRIPT

To add an external script as an alarm for a reminder, choose `Execute External Script`. The next dropdown lists any available AppleScripts, located in the `~/Library/Application Scripts/com.devon-technologies.think/Reminders` directory. Add any of your own scripts to this directory to make them available for any alarm you set.

ADDING AN EMBEDDED SCRIPT

Sometimes you only need to add a script for a specific purpose, not general use with all reminders. DEVONthink allows you to quickly write an ad-hoc AppleScript specifically for the current reminder.

To write an embedded script for a reminder, choose `Execute AppleScript/JavaScript` as the alarm. Click the … button and a popup will appear with a pre-built handler in place. Add your code as necessary, then press the compile button, the one with the stylized eye, to make sure it compiles correctly. If it does, you will see the code format itself subtly. If not, you will hear a system alert. Click outside the popup to dismiss it. When the alarm goes off, the script will be executed.

> Note: When a reminder is set to `Once`, the reminder is removed and the embedded script lost after the alarm goes off. If you have code you'd like to potentially use again, put it in an external script.

TERMINOLOGY

Triggered scripts are defined by a specific handler: `on performReminder(theRecord)`, where `theRecord` is the variable representing the item the alarm is set for.

> **Example:**
>
> ```
> on performReminder(theRecord)
>       tell application id "DNtp"
>             set label of theRecord to 1
>             say (name of theRecord as
> string)
>       end tell
> end performReminder
> ```

Debugging Tip: When testing an external reminder script, use the `Once` interval and set the alarm time. Your intuition may be to look at the clock and set the alarm a minute or two ahead. However, if you set the alarm to a time before the current time, it will trigger instantly. This makes for easier testing before you commit to the true interval you'll use.

If you have external AI set up and a code-compatible model, you can use DEVONthink's Script Assistant. Choose the AI model and enter a description of the desired script in the prompt field, then press the ↩ Return key to compose and refine a script.

TOOLBAR SCRIPTS

Scripts can also be added to the toolbar of any DEVONthink window. While there is a limited amount of space available in a window's toolbar, this is a handy way to launch commonly used scripts with one click.

To add a toolbar script place the script into the folder `~/Library/Application Scripts/com.devon-technologies.think/Toolbar`. In order for the script to be available for use in the toolbar, you must quit and relaunch DEVONthink. Then Control-click the toolbar of a DEVONthink window and choose *View > Customize Toolbar*. Drag your script into the toolbar and it's ready for use.

TERMINOLOGY

Unlike some other script types, there are no special handlers required for a toolbar script. You only need valid AppleScript talking to DEVONthink.

> **Example:**
>
> ```
> tell application id "DNtp"
>       open tab for record (content
> record)
> end tell
> ```

SMART RULES AND BATCH PROCESSING

Not everyone is a coder, perhaps even you. But that doesn't mean you don't have automation needs. DEVONthink has two related technologies that allow you to process your data by constructing a chain of predefined commands: *smart rules* and *batch processing*. While the former are for more transparent background processes and the

latter for handling selected items, both share common traits and methods. Understanding one leads to understanding the other.

SMART RULES

Smart rules are smart groups, evolved. Built in the same style as smart groups, smart rules don't just show items matching criteria, they can act on them! From something as simple as adding (or changing) a color label, to modifying a filename then filing a document in another location, smart rules provide some powerful automation possibilities. And they're not just for the technically inclined. No programming experience is needed for almost every action available.

Smart rules are conceptually simple and can be summed up as follows: *When this event occurs > do this action > on items matched > in this location*. Smart rules are made of four parts:

- **A location:** This is where the smart rule will look for matching items.
- **Matching criteria:** Like a smart group, you can specify criteria to be matched. The smart rule will only act on the matched items.
- **An action:** This is the action the smart rule performs when the event occurs.
- **An event:** This is an event that causes an action to occur, e.g., an "On Quit" event. If used in a smart rule, a specified action would run when you quit DEVONthink.

Create a smart rule: Smart rules can be created in one of two ways:

- Click the + button at the bottom of the sidebar and choose *New Smart Rule*. The *Search in* dropdown will target the current location.
- Control-click an item in the sidebar and choose *New Smart Rule* from the context menu. This will specifically target that item in the *Search in* dropdown.

Note in either case you can change the *Search in* parameter to target other locations, including all open databases.

> Note: Smart rules are considered global objects and can be created only in the *Navigate* sidebar of a main window. If you want to create a smart rule for a group in the item list, choose *Data > Reveal* to display it in the *Navigate* sidebar.

When you create a new smart rule, you will be shown the predicate editor, just as you see with smart groups. Just follow these simple steps to define the parameters of the rule (with an example):

- **Name:** Give the rule a name, like *Label Edited Screencaptures*.
- **Location:** Set the *Search in* dropdown to target your desired location, like a group you add screen captures to. The more specific the better; a good idea is to use e.g., a database's inbox.
- **Matching:** Add any criteria to be matched, e.g., `Name begins with screen` and `Kind is Image`.
- **Event:** Choose an event to trigger the smart rule, like specifying `On Save` to run

the smart rule when matched items are saved in DEVONthink
- **Action:** Choose an action for the smart rule, perhaps `Change Name` to add "_edited" to the name.

This rule shown above would add "_edited" as a suffix to the name of any edited images whose name begins with "screen".

One step further, chained actions: If you hadn't noticed, there's a *+* button to the right of the action you specified. And yes, that means you can chain multiple actions in a smart rule! For example, we could add an action to open the edited imaged in the system default application after it has been renamed.

Understanding the input: In a smart rule, there always is only one input. You can't use conditionals or split the actions into a parallel process. A matched document is passed along through the entire process. So if you have a smart rule processing Markdown files and one of your actions is `Convert to Rich Text`, the resulting rich text file is created but not passed on to the next actions. The originally matched Markdown is still the input. However, there are two actions that allow switching the input: `Duplicate & Continue` and `Convert & Continue`. The items created by these actions become the input for the following actions. In our example, these actions would pass on the resulting rich text document as the input for the rest of the rule.

Order of operations: If you have more than one smart rule targeting the same location and/or types of files, they will run in the order they appear in the *Navigate* sidebar. The topmost rule will execute first, then the second, and so on. Be aware one rule could make a change that affects whether an item is matched by subsequent rules. If it does, those rules logically will not process the items. Drag related smart rules into the order they should run or stop and reconsider how your rules are set up.

Chaining smart rules: Creating smart rules with more limited functions is often useful. For example, a rule that just files documents based on a certain custom attribute can be used on selected documents or by drag and drop to the rule. Now say you have another rule with more complex functions, e.g., moving a document into a database, doing OCR, then adding custom metadata. Provided it's using the same custom metadata, instead of adding the same actions as the previous rule, add the *Apply Rule* action and choose the filing smart rule. Now add another smart rule that should also file things based on the same custom metadata but in a different location. Use the `Apply Rule` action there as well. Now both rules can use the filing smart rule's actions without having to redundantly add their own actions. This is a powerful way to extend the functions of a smart rule while also using the simpler functions, when needed.

Working Safely: In smart rules, the actions are executed based on the event handler you're using. For testing, set the event trigger to `On Demand`. This way you can select the rule to see its matches, then Control-click it and choose `Apply Rule` to run it and see the effects on the matched items. Once things are working as expected, you can add other event triggers to suit the situation.

Also be aware the effects of smart rules are very broad, i.e., they affect all the items they match. While you are testing, it's a good idea to put some limiting criterion in place. For example, instead of matching all images in all databases, try matching images in a specific group or only images that begin with "Screen".

BATCH PROCESSING

Smart rules are useful for repetitious actions, usually happening in the background. For times when you need to make impromptu changes on specific items, e.g., prefixing a date to the name of several documents, batch processing is the best option.

Select a few documents to process, then choose *Tools > Batch Process*. The *Batch Processing* window appears where you can create your chain of actions, just as described for smart rules. Then press *OK* and the documents are modified. And if this is something you'll do often, you can create new reusable configurations as you need them. Note not every smart action is available in batch processing. However, for most actions the available ones are more than sufficient.

EXPORTING AND IMPORTING

If you want to share or backup individual smart items, it is easily done. The simplest way to export a smart item is to drag and drop it to the Finder. Smart rules export as `.dtSmartRule`, batch configurations as `.dtBatchProcess` files. You can also choose *Export* from the context menu for a smart rule or batch configuration. And lastly, you can export from the action menu in the *Batch Process* window.

To import these items, you can simply double-click the exported file to reinstall it. Alternately, for smart rules, you can also drag and drop directly into the *Smart Rules* or choose *Import* from the context menu. For batch configurations, you can drag and drop to the *Configurations* section of the *Batch Process* window or choose *Import* from the context menu or action menu.

If you want to share or independently backup all these smart items, you can find the `BatchProcessing.plist` and `SmartRules.plist` in the `~/Library/Application Support/DEVONthink` directory.

For your reference, there is a complete list of available Events and Actions. For those interested in the using script-based actions, continue to the next section...

SMART ITEM SCRIPTS

Smart item scripts are AppleScripts or JavaScripts run by specialized actions in a smart rule or batch processing. These actions allow you to extend the possibilities beyond the already powerful pre-defined actions.

There are three actions you will use: one simply runs code on matched items, the other can also handle incoming and outgoing data, and one handles input.

SCRIPT ACTIONS

Apply Script: This action runs AppleScript or JavaScript for Automation (JXA) code on the matched items. It runs as a standalone action, not receiving or passing along any data to its surrounding actions. It is often used for specific functions not available in the pre-defined actions. For example, using a specific tag on a document for filing or setting metadata. This action also has the advantage of being able to quickly process multiple documents.

Set Script Input: This optional action functions as a variable, a temporary container for a value to be passed on to the `Script with Input/Output` action. The input can be set from many sources, like a chat response, a document's aliases, etc. However, it only accepts strings, numbers, or URLs.

Script with Input/Output: This powerful action contains a script handler that receives input and can also send information to actions that follow it. Getting information from other steps in your process opens up new opportunities for deeper automation. To accept input from a previous action, use the `Set Script Input` action. If you're using output from the action, it can be accessed with a Script Output placeholder.

If you examine some of the built-in scripts, you can see examples of input and output. For an example output only, the `Coordinates` script gets the latitude and longitude from the geolocation of a record, something for which there is no specific smart action. So it returns those values to be used with a subsequent action via the `Script Output` placeholder, perhaps one that sets custom metadata. For an input example, see the `Annotation – Append Text` script. It receives input from a `Set Script Input` action to be added to the end of the document's annotation file.

EXTERNAL SCRIPTS

External scripts are accessible to any rule or configuration. So if you have code that would be useful in more than one process, saving them externally is a good idea. To run an external script, add the action, select `External`and choose one of the installed scripts.

In the `~/Library/Application Scripts/com.devon-technologies.think/` directory you can find the scripts for the `Apply Script` action in `Smart Rules` and those for `Script with Input/Output` in `Script Output`. And of course you can add any of your own scripts.

We have compiled a list of the pre-installed scripts, for everyday use and your education.

EMBEDDED SCRIPTS

If you are writing a script for a specific smart rule or batch process, you can use an embedded script. The code is part of the action and can't be used by another other smart rule or configuration.

To create an embedded script, add an `Apply Script` action then choose *AppleScript* or *JavaScript*. Click the `Edit Script` button and a popup will appear with a pre-built handler in place. Add your code, and press the compile button, the one with the stylized eye, to make sure it compiles correctly. If it does,

you will see the code format itself subtly. If not, you will hear a system alert. When done, click outside the popup to dismiss it.

For those new to scripting, there is a pre-built handler for each type of action.

TERMINOLOGY

Apply Rule: These scripts are defined by this handler: `on performSmartRule(var)`, where `var` is the variable representing items matched by the smart rule.

> **Example:**

```
on performSmartRule(theRecords)
	tell application id "DNtp"
		repeat with theRecord in theRecords
			if (name of theRecord as string) contains "Piglet" then
				set state of theRecord to true
			end if
		end repeat
	end tell
end performSmartRule
```

Script with Input/Output: These scripts are defined by this handler: `on scriptOutput(theRecord,theInput)` You can see there are two parameters for the handler: `theRecord` and `theInput`. In order to use the input parameter, it must be proceeded by a `Set Script Input` action. Here is an example of the handler:

> **Example:**

```
on scriptOutput(theRecord, theInput)
	tell application id "DNtp"
		set name of theRecord to (its name & "-" & theInput as string)
		return name of theRecord
	end tell
end scriptOutput
```

EXTERNAL DEBUGGING

While there isn't a step-by-step logging of all actions in a smart rule, when you are using a script action, errors will be reported in the Log window or toolbar button. However, if you're writing the script in Apple's Script Editor, here are two core snippets you could use to develop and test the script:

> **Example:**

```
tell application id "DNtp" to my performSmartRule(selected records)
on performSmartRule(theRecords)
	…
end performSmartRule

tell application id "DNtp" to my scriptOutput(selected record 1,"")
on scriptOutput(theRecord,theInput)
	…
end scriptOutput
```

After you have the script working, you can copy and paste it into the script in your smart item.

If you have external AI set up and a code-compatible model, you can use DEVONthink's Script Assistant. Choose the AI model and enter a description of the desired script in the prompt field, then press the ↩ Return key to compose and refine a script.

AI ACTIONS AND SCRIPTS

Artificial Intelligence has been integrated into many aspects of DEVONthink and automation is certainly included. Here we will look at a few different options for using your AI model.

SMART ACTIONS

There are two specific smart actions available to use in smart rules and batch processing: `Chat - Query` and `Chat - Continue if`. These actions are simple to use and require little more than creating a good prompt. Each action works in conjunction with a subsequent one. You make your query and receive a response, then you use another action to do something with it.

Chat - Query: This action allows you to enter a pre-made prompt or ask a question. This action can be used with or without a document, as the need fits. And if you defined a *Role* in the *AI > Chat* settings, it will be used to shape the response in this action.

- **Without Document:** Enter an open prompt just as you would in the *Chat* popover.
- **With Document:** Enter a prompt to be used with the selected document as your would in the *Chat* inspector. You can explicitly choose `Text`, `Vision` for images, or `Auto` to let the AI decide.

The response you get back from your AI model is stored in a special placeholder: `Query Response`. Depending on the nature of the question and answer, you may be able to use this placeholder directly with another action. Or you may use it in another action further along in the chain of actions.

Chat - Continue if: This is a conditional action allowing you to enter a prompt for your AI and get a yes or no in return. If the response is yes, the following actions will be run. If not, it will stop running. As a simple example, you could ask if the selected document mentions scripting. If it does, use the `Apply Script:Tags - Add Most Important Words` action to tag it.

RELATED ACTIONS

There are a few smart actions that can provide flexibility to or extend the usefulness of the AI responses in automation. Note they aren't specific to the higher editions of DEVONthink or only for AI actions.

User Input: Only used in *batch processing*, this action opens a dialog for you to enter text. Enter the question or comment to be answered in the dialog. Ask a question, enter an answer. The results of this action are stored in the `User Input` placeholder. One way this can be used with the AI actions, is to create a dynamic prompt for a `Chat — Query` action that contains reusable instructions, e.g., formatting, etc. It can also be used with the next action: `Set Script Input`.

Set Script Input: Discussed in the previous section, this acts as a variable. It can accept input from many actions, including the `User Input` action. Regarding AI, it will accept input from the `Chat Response` placeholder so you can pass it on to the next action: `Script with Input/Output`

Script with Input/Output: Also discussed in the previous section, this action accepts input provided by the `Set Script Input` action and uses it in the embedded or external script you choose. In regards to AI, this action can pass its `return` value to one of the chat actions via the `Script Output`.

SCRIPTING

Another way DEVONthink has integrated AI into its automation tools is via script commands. You can view DEVONthink's AppleScript dictionary for more information but here is a brief introduction to the commands.

display chat dialog: Provide a `prompt` and the specifier, e.g., a window or document to process, and this opens the *Summarize and Transform* popover with your AI's response. Optionally, add a `role` and a window `name`.

Example:

```
tell application id "DNtp"
	display chat dialog think window 1 name "Top five words" ¬
		role ("Provide the response in Markdown formatting. " & ¬
		"Include the frequency of each word in parentheses. " & ¬
		"Add a short summary. Include any misspelled words " & ¬
		"and their corrections at the end.") ¬
		prompt ("What are the five more frequently used words " & ¬
		"in this document?")
end tell
```

download image for prompt: If you need to create an image programmatically instead of using the Generate Image window, you can use this command. Specify the `engine`, noting the options like `size` are governed by the engine you're using. See the *AI > Images* settings for more information. Also the image is returned as a `data` class.

Example:

```
tell application id "DNtp"
	set imageData to download image for prompt ¬
		("A 1934 canary-yellow Ford sitting at a stop light " & ¬
		"next to a red Ford Fusion. High noon on a small " & ¬
		"town main street.") ¬
		engine FluxPro aspect ratio "16:9"
	set newImage to create record with ¬
		{name:"Fords", type:picture} in current group
	set data of newImage to imageData
end tell
```

get chat models for engine: Displays the available models for a specific AI engine.

Example:

```
tell application id "DNtp" to get chat models for engine Claude
-->{"Claude 3 Haiku", "Claude 3.5 Haiku", "Claude 3.5 Sonnet", "Claude 3 Opus"}
```

get chat response for message: This can be used in many different ways, when provided with your `prompt` and many options, e.g., `engine`, `role`, `temperature`, etc. You can also include a reference to a selected `record` or a list of them. Here is a simple interactive example of document creation:

Example:

```
tell application id "DNtp"
	set theInput to text returned of ¬
		(display dialog "Tell me about…" ¬
			default answer "sea turtles")
	set aiReply to (get chat response for message ¬
		"list seven interesting facts about " & theInput & ¬
		" in a Markdown table. Don't number the items. " & ¬
		"Don't use emoji. Include live hyperlinks to the " & ¬
```

```
            "sources. Add only " &
theinput & ¬
            " as the headline and
include a picture after it.")
      set newDoc to create record with ¬
            {name:(paragraph 1 of
aiReply as string), ¬
            type:markdown,
content:aiReply} ¬
            in current group
end tell
```

Obviously, this command is far more powerful than just making Markdown documents about sea turtles! But this hopefully provides a view of the syntax.

AI PROMPTS, ROLES, AND SKILLS

There are many times we find ourselves rerunning the same prompts, copying and pasting from a repository of notes. Open the *AI > Library* settings and you'll find that's no longer necessary. In this pane, you can build a proper library of these often-used functions, manually or with AI assistance.

DEFINITIONS

Let's start with defining the terms used with these functions. In the AI library settings, you can create and edit three types of AI-related functions: prompts, roles, and skills.

Prompts: Though we may not use the term, we are all very accustomed to prompts. These are the things we tell AI to do. "Search online information about skunks, both scientific and casual. Return at least 20 useful results. Present them in an HTML document with all references linked."

Prompts require a *Keyword* and *Instructions*. The keyword tells AI to run the task in the instructions. *Use when* merely provides a description of what the task does.

Roles: While optional, a role is a persona used by the AI to steer the responses. At times, we need a more focused reply, e.g., when building information for young people or even needing a layperson's view on subjects you are unfamiliar with. When using a role, that persona is loaded and will filter and steer AI's replies based on that role. For example, "You are an expert nature writer, combining science and beautiful prose in a way that appeals to people, from academics to nature lovers."

You can define as many roles as you need and even call them from a prompt or skill. Imagine you are creating a series of pamphlets for a nature center. You could have a role to write for young children, one for teens, and another for adults. If you need a specific style, roles are a good choice.

Roles require a *Keyword* and *Instructions*. The keyword "loads" the role for the subsequent prompts. *Use when* is merely descriptive, the situation where the role could be used.

Skills: Skills are an instruction set, defining a task to accomplish. It is a series of prompts given to the AI to follow. Unlike scripting, the AI has the ability to make decisions about the steps, even do some multiple times as it refines the information to pass on to its next steps. As you can see in the built-in skills, there are examples of organizing, creating digests and summaries, building Wiki

pages, etc. Also note skills can make use of DEVONthink's MCP server, regardless if it's enabled in the *AI > Chat* settings.

The options are seemingly unlimited here as uses will often be very specific to your own situation. But following our running example, you could create a skill like "Find documents in this database related to @. Write the copy for a pamphlet using the child role, then the teen role, then the adult role. Output each as individual HTML documents, styled with nature colors, and softer fonts."

At a minimum, skills use a *Keyword*, *Instructions*, a *Context*, and *Tools*. *Use when* allows AI to run the skill from interpreted prompts instead of explicitly using the keyword. It is required if you want to enable *Let the assistant use this on its own*.

Keywords: With each function, you can assign a keyword, also called a slash command. This is a shortcut for running any of the functions, e.g., in the *Chat* assistant or calling a prompt in AI-specific smart actions. And take note of a special placeholder used in the instructions of a prompt or skill, `%@`, and it represents something you've typed after the slash command. Imagine a prompt of "Search for information about %@ in the Nature database." with a keyword of `/nat-writing`. If you opened the Chat assistant and typed, `/nat-writing pheasants`, it would search for pheasants. Similarly, you could as the placeholder to denote a number of items, e.g., with a small change to the prompt, `/tags 8` would suggest eight tags.

CREATING AN AI FUNCTION

Designing your own function is a new process for many people. Fortunately, there are practical examples built in so you can examine, duplicate, and modify them, as needed. However, let's walk through manually creating a skill to generate a simple report from receipts in a `My Finances` database.

- **Start with the idea:** Examine receipts in a given time period to determine how much I spent and on what.
- **New > Skill:** `Finance View`
- **Keyword:** `/fin-view`
- **Use when:** `user asks for a monthly summary of finances in a certain timeframe`
- **Instructions:** Tell the AI what to work on and what the task requires.

> **Example:** Locate a user-requested group %@ in the "My Finances" database. Extrapolate the date, if needed, e.g., "March of 2025" could be organized as "/2025/03".
> - For each document, extract: vendor, date, amount, and category (e.g. groceries, utilities, software, travel, medical). If a document is unreadable or missing an amount, flag it instead of guessing.
> - Do not modify or delete any files.
> - Produce a short summary: total spent, breakdown by category, and the three largest individual expenses. Create a circular pie chart with each wedge representing a category. Flagged items are callouts. Use ultralight, medium, and bold fonts. Save this report as an HTML file named "%@ Finances" in the root of the database.

> - Do not stop and ask for confirmations.

- **Context:** `Nothing` as we provide a date to look at when the skill is called.
- **Tools:** `Read & edit contents` since AI needs to examine each document and create an output document.
- **Let the assistant use this on its own:** Enabled so AI can interpret a prompt and run the skill.
- **Ask before automatic use:** Disabled so it can run unattended.
- **Isolated run (send without chat history):** This is optional but enabling it does allow you to choose a specific AI model to execute the tasks.

Now you have a skill you can call by typing `/fin-view` followed by a date or even asking, "What was my spending last month?"

AI Assistance: In addition to being your library of AI functions, you can also use AI to create these items for you. When you create a new skill, you can manually enter your the instructions, etc. if you are familiar with the process. Otherwise, enter some explanatory text in the editing field at the top right, either a new idea or changes you'd like to make to an existing function. Then press the *Edit* button (or *Generate* for new functions) and the keyword, use field, and instructions will be populated for you.

As skill creation is new for many people, describing your task to AI and letting it build the skill for you is a good way to get started. Even if you have some experience, you can ask AI to assess and improve on a skill you've created.

Using scripts in skills: When creating a skill, you can prompt AI to create scripts, AppleScript and JavaScript for Automation (JXA), if needed for the skill. For example, you may have a skill that gathers certain files but you need it to produce a ZIP file to send to someone. Instruct it to create and use a script as part of the skill. After the script is created, you will see a icon next to the *Tools* popup. Clicking on it opens a popover where you can open the *Skills* directory, reveal the script, or open the script in the default script editing application.

Scripts in skills typically use the `Script with Input/Output` syntax discussed in the smart item scripts section of this chapter.

If DEVONthink is enabled to use iCloud Drive, these scripts will be stored in a `DEVONthink/Skills` folder in iCloud Drive and will sync to your other Macs. If DEVONthink isn't enabled to use iCloud Drive, the scripts are stored in the `~/Library/Application Script/com.devon-technologies.think/Skills` directory. These scripts should be saved as text, not compiled – `.applescript` or `.js` – and use a hyphen-delimited name. In the skill's instructions, you can call a script using a form like `Use run_script "/Skills/my-fancy-script.applescript" on the selected records.`

Sharing: Exporting any of these functions yields a `.dtSkill` file, containing the parameters and settings. For skills, any associated scripts are included as part of the export, so there's nothing to manually install when importing on a different machine.

> Note: Bear in mind, prompts, skills, and scripts may not produce the desired results on the first run. Iteration is not a shortcoming. It is part of the process. Make sure to test on smaller batches of data before committing to full integration. And also allow your functions to evolve over time, as needed.

SMART TEMPLATES

Some of the DEVONthink provided templates are "template packages" (`.dtTemplate`) and "smart templates" (`.templatescriptd`). Stored in the `~/Library/Application Support/DEVONthink/Templates.noindex` directory, both types of templates provide a great deal of flexibility and power, like allowing for inclusion of language resources. With some creativity and scripting know-how, you can set up everything from commonly used group hierarchies to daily journal entries and much more.

TEMPLATE PACKAGES

The simpler type of automated templates DEVONthink supports are: template packages. These are folders with the file name extension `.dtTemplate` that contain one or multiple `.lproj` folders, one for each supported language. Depending on the system language, you can let DEVONthink import the files in the correct language.
If you inspect the contents of a template package, e.g., *Classifications > Decimal Filing System.dtTemplate*, you will see the project folders and their assets as a great example of this type of template.

SMART TEMPLATES

The more advanced type of automated templates are smart templates. These are not simple files, but actually AppleScript packages containing script code, and often including related assets that can be inserted into your database. This allows for some very powerful actions like:

- The script can add information to the built-in template, e.g., the current date and time or data from the web.
- The script can act intelligently on data on the clipboard: If it's a simple text, it adds the text; if it's a URL, it adds it to a different area of the document and makes it clickable.
- The script can check if a certain application is installed, e.g., OpenOffice, before adding a document.

CREATING TEMPLATES

Template Packages: To create your own template package, you can duplicate an existing template, Control-click it, choose *Show Package Contents* and edit the internals as needed. Also note exporting multiple selected files will yield a template package.

Smart Templates: To make your own smart templates, have a look at the prefabricated smart templates. Duplicate a `.templatescriptd` file, like the "Note" template. Control-click it, and choose *Show Package Contents*. You can inspect and modify the supporting assets and the `main.scpt` file to fit your needs.

TEMPLATE PLACEHOLDERS

Placeholders in templates are simple control codes that are replaced by DEVONthink when a template file is imported. These placeholders can be used in your files, including simple templates, or folder names of your templates packages. When used in files, they are typed in the text of DEVONthink-native files; e.g., plain or rich text, Markdown, etc. These can be manually typed or you can Control-click in the text and choose *Insert Placeholder*. Below is a list of valid placeholders:

- **%time%:** The current time
- **%date%:** The current date
- **%shortDate%:** The current date in short format
- **%longDate%:** The current date in long format
- **%monthname%:** The month name of the current date
- **%weekday%:** The week day name of the current date
- **%day%:** The day number of the current date
- **%month%:** The month number of the current date
- **%year%:** The year number of the current date

- **%author%:** The *Author* set in the *Editing > General* settings
- **%username%:** The user's name
- **%fullUsername%:** The user's full name
- **%organization%:** The user's organization from Contacts
- **%emailAddress%:** The user's email addresses from Contacts
- **%host%:** The host name
- **%databaseName%:** The database name
- **%databasePath%:** The database's path
- **%groupName%:** The name of the parent group
- **%topGroupName%:** The name of the top group
- **%clipboard%:** The clipboard contents as plain text
- **%styledClipboard%:** The clipboard contents as rich text
- **%clipboardLink%:** The clipboard contents as a clickable rich text link if the clipboard contains a valid URL

> Note: There are more placeholders from the context menu than can be used in a template. For example, the placeholder `%record_locality%` relates to an existing record, so this placeholder will not be used when creating a file from a template.

Custom Placeholders: One more powerful feature of smart templates is the ability to define custom placeholders, extending the possibilities beyond the list shown here. This allows you to add a custom placeholder in the text of a template, then define the replacement value for that placeholder in the `main.scpt`. As a great example, check out the use of the custom `%project%` placeholder in the Project smart template. Notice the use of the placeholder in the enclosed rich text file and the script.

TERMINOLOGY

With the internal script of a smart template, there are no special handlers required. However, the internal script must be located in the `Contents/Resources/Scripts` folder

inside the package, and it must remain named `main.scpt`. Beyond that, you only need valid AppleScript.

TEMPLATE LOCALIZATION

If you need to support multiple languages in your templates, it is possible to have the name and/or content change based on the language in which DEVONthink is running. You can add your own definitions in `.strings` files in the `Contents > Resources` directory of a template package. Here are the files that can be used:

- **LocalizedNames.strings:** Contains definitions of the localized name of the item created by the template. The syntax defines one name per line: `"en"="My Project";` or `"de"="Mein Projekt";`.
- **Localizable.strings:** This file must be contained in a subdirectory of the Resources folder, named with the country code and `.lproj` extension, e.g., `fr.lproj` would contain French strings. Contains localized definitions of words or phrases, e.g., the content in a document created by the template. The syntax defines one word or phrase per line: `"Daily Journal"="Tageszeitung";`.

TOOLBAR TEMPLATES

To add any template to the toolbar, place the template into the folder `~/Library/Application Support/DEVONthink/Templates.noindex/Toolbar`. In order for the script to be available for use in the toolbar, you must quit and relaunch DEVONthink. Choose *View > Customize Toolbar*, drag your template into the toolbar and it's ready for use.

APPLE MAIL RULES

When considering importing emails into your DEVONthink databases, the question of "automatic" email importing invariably comes up. While this isn't fully possible yet, there is a mechanism in Apple Mail that can provide some level of "automatic": *Mail Rules*.

Found in Apple Mail's *Settings > Rules*, these are a rules consisting of criteria to be matched and an associated action (similar to smart rules). As incoming emails are detected, Mail will check for matches in a rule and execute any actions you've specified in the rule.

One of the actions available is `Run AppleScript`. Selecting this option shows a dropdown with any installed Mail Rule scripts. These scripts are installed in `~/Library/Application Scripts/com.apple.mail` folder. If you write or obtain other scripts for use with Mail Rules, they can also be placed in this directory. The scripts provided by DEVONthink are:

- **Mail Rule - Add attachments to DEVONthink:** Adds the attachment of the message it acts on as separate documents to DEVONthink.
- **Mail Rule - Add links to DEVONthink:** Adds detected links in the messages as individual bookmarks in DEVONthink
- **Mail Rule - Add messages to DEVONthink:** Adds the messages it acts on to DEVONthink.

- **Mail Rule - File messages & attachments:** Adds the messages it acts on including all attachments to DEVONthink.
- **Mail Rule - File messages & attachments hierarchically:** Adds the messages it acts on including all attachments to DEVONthink, recreating the mailbox structure.

TERMINOLOGY

A full lesson on writing scripts for Mail Rules is beyond the scope of this help, but you can open and explore the installed scripts.

Do note there are two required handlers: `using terms from application "Mail"` and `on perform mail action with messages theMessages for rule theRule`, where `theMessages` is a variable representing the items matched by the rule. Here's a simple example:

> **Example:**
>
> ```
> using terms from application "Mail"
>       on perform mail action with
> messages theMessages for rule theRule
>             tell application "Mail"
>                   repeat with
> thisMessage in theMessages
>                         display alert
> "" & (subject of thisMessage)
>                   end repeat
>             end tell
>       end perform mail action with
> messages
> end using terms from
> ```

> Note: Mail Rules are controlled by Apple Mail, not DEVONthink. While they generally behave as expected, we can't control whether the rules will be triggered in Apple Mail.

APPLICATION SCRIPTS

AppleScript is perfectly suited for integrating different applications, interchanging information, and creating workflows. DEVONthink comes with a number of scripts that exchange information between DEVONthink and other AppleScript supporting applications, like Safari or Mail.

The Script Menu Extra Scripts provided by DEVONthink are installed in an application-specific folder in `~/Library/Scripts/Applications`, e.g., `~/Library/Scripts/Applications/Safari`. These scripts are accessible from the global scripts menu in the menu bar at the top of your screen while you're in the specific application.

MAIL SCRIPTS

Importing email into your DEVONthink databases is a possible use of AppleScript. Using AppleScript-enabled email applications, especially those with a robust scripting dictionary, increases the potential for processing emails. This can help you quickly file those emails directly into DEVONthink.

DEVONthink comes with scripts for Apple Mail, Microsoft Entourage, and Microsoft Outlook. Just select a message or mailbox in a supported email application and choose the desired script from the global scripts menu. DEVONthink provides the following scripts:

- **Add attachment(s) to DEVONthink:** Adds the attachments of selected emails to DEVONthink.
- **Add mailbox(es) to DEVONthink:** Adds the selected mailboxes to DEVONthink.

- **Add mailbox(es) & attachments to DEVONthink:** Adds the selected mailboxes to DEVONthink. Attachments are imported separately.
- **Add message(s) to DEVONthink:** Adds the selected mailboxes to DEVONthink.
- **Add message(s) & attachments to DEVONthink:** Adds the selected mailboxes to DEVONthink. Attachments are imported separately.

WEB BROWSERS

Depending on the capabilities of the web browser you're using, you may be able to use application scripts. We have included a handful of simple scripts that can be run while browsing in Safari or DEVONagent.

- **Add abstracts to DEVONthink:** Creates a sheet containing information about items in a DEVONagent search. This includes the title, score, summary, and URL of each result. (DEVONagent only)
- **Add linked images to DEVONthink:** Detects images on the current page and adds them to your database.
- **Add tabs to DEVONthink:** Adds bookmarks for active tabs the browser.

- **Add linked images to DEVONthink's downloads:** Detects images on the current page and adds them to DEVONthink's *Download Manager*.
- **Add links to DEVONthink's downloads:** Detects URLs on the current page and adds them to DEVONthink's *Download Manager*.

OTHER APPLICATIONS

Obviously we haven't covered all the possible applications or scenarios on your machine, and we are sure you have ideas we haven't thought of. If you have an application you'd like to integrate with DEVONthink, check if it has an AppleScript dictionary. If it does, the potential exists to communicate between the applications. But also be aware the commands, elements, and properties you can work with are coded by the developer of those applications.

FOLDER ACTIONS

Folder actions are scripts that you can attach to folders in the Finder. These act on all items you add to these "hot folders." When you add items, the operating system detects the added files and runs any folder actions attached to the folder.

The actions supplied by DEVONthink are installed in `~/Library/Scripts/Folder Action Scripts`, and you can add your own scripts to this directory, as needed. For everyday use and exploration, here are the folder action scripts provided by DEVONthink:

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

- **DEVONthink - Index:** Index files to your database, creating links to the original items in the Finder.
- **DEVONthink - Index to selected group:** Index files to the currently selected group in your database.

These built-in actions also include this line to run an available smart rule on imported or indexed items: `perform smart rule record theRecord trigger import event`. You can enter the name of a specific smart rule in your own scripts, as needed.

- **DEVONthink - Import, OCR & Delete:** Imports files into your database, converts them to searchable PDFs if necessary, and moves the files to the trash afterwards.

This built-in action include this line to run an available smart rule after OCR has finished: `perform smart rule record theRecord trigger OCR event`. You can enter the name of a specific smart rule in your own scripts, as needed.

ATTACHING A FOLDER ACTION

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

- Control-click a folder in the Finder.
- Select *Services > Folder Actions Setup* from the context menu.
- From the list of available actions, select the folder action script click *Attach*.

Manage folder actions: To manage all your folder actions, Control-click a folder and choose *Services > Folder Actions Setup* from the context menu. Use the Folder Actions Setup utility to see which folders have scripts attached, and to remove folder actions from folders.

> Note: Modern versions of macOS will require you to allow the Folder Actions Setup application to run. This notification is controlled by the operating system, not DEVONthink.

TERMINOLOGY

While we can't provide specific training on how to create folder actions, check out Apple's documentation. However, the `on adding folder items to folderVariable after receiving filesVariable` is the handler most commonly used in our folder action scripts. Here is a simple example:

> **Example:**

```
on adding folder items to theFolder after
receiving theFiles
	repeat with thisFile in theFiles
		tell application id "DNtp"
			set newRecord to
import thisFile to incoming group
			if exists newRecord
then ¬
				tell
application "Finder" to delete thisFile
		end tell
	end repeat
end adding folder items to
```

Folder actions, like any computer processes, are treated very literally. When processing files with a folder action, it's best to move or delete the files from the watched folder. This keeps the action from trying to reprocess files.

Also, while folder actions can still be a useful option, many can be replaced by indexing a Finder folder and processing their contents with smart rules. You can use the `Move into Database` action to import the document into your database, keeping the Finder folder clean for subsequent additions.

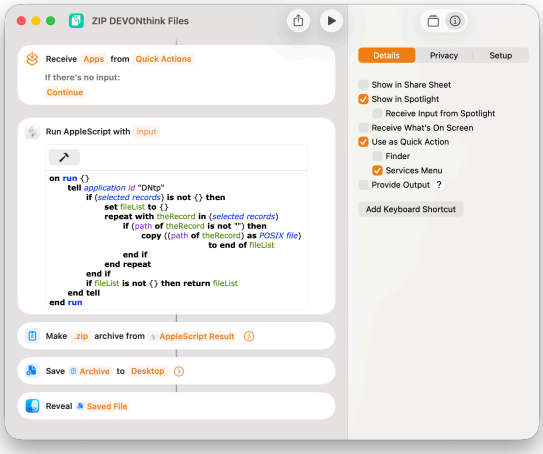
SHORTCUTS AND AUTOMATOR

Apple's Shortcuts and Automator applications were created to help non-programmers take some control of their machines. They allow you to visually string together simple steps to create an automated process. Though much more limited due to their linear nature and lack of debugging tools, they may still be useful for some situations. Additionally, they let you create other types of items like workflows, services, or Quick Actions.

DEVONthink doesn't offer specific Shortcut or Automator actions. However, as DEVONthink has a deep and robust scripting dictionary, the `Run AppleScript` action in those applications opens up some automation opportunities. The key to integration with DEVONthink is passing or receiving file paths via scripting.

> Note: While Shortcuts is newer, the tips presented here generally apply to both applications. And while we may investigate DEVONthink-specific questions regarding Shortcuts or Automator, we do not offer support specifically for them.

GETTING INFORMATION INTO DEVONTHINK

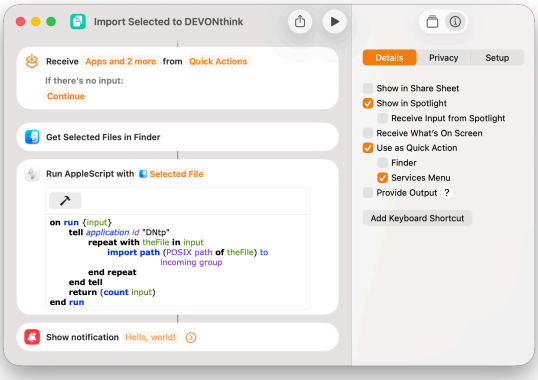


As an example, importing selected files in the Finder can be accomplished by passing file paths to DEVONthink. To do this, use a `Get Selected Files in Finder` action before this `Run AppleScript` action:

> **Example:**

```
on run {input}
	tell application id "DNtp"
		repeat with thisFile in input
			import (POSIX path of thisFile) to incoming group
		end repeat
	end tell
end run
```

SENDING INFORMATION OUT OF DEVONTHINK



For passing items from DEVONthink, this `Run AppleScript` action provides a list of file paths to be processed. This action should be placed before the third-party application's actions.

> **Example:**
>
> ```
> on run {}
> 	tell application id "DNtp"
> 		if (selected records) is not {} then
> 			set fileList to {}
> 			repeat with thisRecord in (selected records)
> 				if (path of theRecord is not "") then
> 					copy ((path of theRecord) as POSIX file) ¬
> 						to end of fileList
> 				end if
> 			end repeat
> 		end if
> 		if fileList is not {} then return fileList
> 	end tell
> end run
> ```

> Note: In Shortcuts, the records' path likely needs to be passed as a `POSIX file`. Automator prefers POSIX paths, so use `copy (path of thisRecord) to end of fileList` instead. Also, you need to ensure the selected items are not groups or smart groups as they don't exist in the filesystem.

WARNING: Be very cautious when using the paths from DEVONthink. Actions like moving, deleting, renaming etc. would compromise your database. Immediately following the AppleScript action, use a `Save` action with the `AppleScript Result` in Shortcuts or the `Copy Finder Items` action in Automator to keep from modifying the underlying files in your database.

ITEM LINKS

Every database, group, or document in your DEVONthink database has a URL (uniform resource locator) associated with it. While web URLs typically begin with `http://` or `https://`, DEVONthink's URLs take the form of `x-devonthink-item://` followed by a long alphanumeric ID. These are most commonly used for backlinks and deeplinking, even with external applications. But item links can also be used as a type of automation when extended with URL parameters.

You can get this item link manually by selecting a document or group and choosing *Edit > Copy Item Link*. You then can manually extend the copied URL with the following parameters, as needed:

- **app:** Used in conjunction with the `openexternally` parameter, specify the name of the app to open the referenced file with, e.g., `x-devonthink-item://E35A4AFF-`

`BD90-4131-9D54-62849E0EF4DE?openexternally=1&app=preview`.

- **length:** Specify the number of characters from the `start` parameter. Used in selection links.
- **openexternally:** Opens the referenced item in the system default application, e.g., opening a PDF in Preview. Used with a value of `1`, e.g., `openexternally=1`.
- **opentab:** Opens the referenced item in a new tab in the current main window if a document is already being viewed. Used with a value of `1`, e.g., `opentab=1`
- **page:** Opens a PDF to the specified page. Usage: `page=<integer>`.
- **reveal:** Reveals an item in the item list instead of opening it in a new window. Usage: `reveal=1`.
- **search:** Directly jumps to the first occurrence of the search string in the specified document. Usage: `search=<string>`.
- **start:** Specify the starting character on the current page. Used in selection links.
- **time:** Directly jumps to the specified time in seconds in a video or audio document. Usage: `time=<float>`.

> **Example:**
>
> ```
> x-devonthink-item://<recordID>?reveal=1
> x-devonthink-item://<pdfID>?page=5
> x-devonthink-item://<textFileID>?search=iPad%20Pro
> x-devonthink-item://<movieID>?time=43.5
> ```

> Note: The first parameter after the ID is always added after a question mark (?), additional ones after an ampersand (&), and any values must be percent-encoded.

TERMINOLOGY

Manually getting item links can be useful for some hard-coded cases, but there are many times you want to get them programmatically. There are two AppleScript properties for a `record` related to item links:

- **reference URL:** This is the item link as described above.
- **UUID:** This is the unique identifier of the item, i.e., the long alpha-numeric string in the reference URL.

Here is an example of getting and using an item link to create a Markdown compliant link on the clipboard:

> **Example:**
>
> ```
> tell application "DNtp"
> 	set recordName to name of content record
> 	set recordURL to reference URL of content record
> 	set the clipboard to ("[" & recordName & "](" & recordURL & ")")
> end tell
> ```

The terminology for using item links can depend on the capabilities of the application you're scripting. Here is an example, using a hard-coded URL, with an application that can open URLs:

> **Example:**
>
> ```
> tell application "Opera"
> 	tell window 1
> 		make new tab with properties ¬
> 			{URL:"x-devonthink-item://" & ¬
> 				"929D101B-35AC-474C-801C-D8818C48DB80?line=125"}
> 	end tell
> end tell
> ```

P.S.: For the shell scripters, the URLs can be used with an `open` command.

URL COMMANDS

URL commands are similar to item links but instead of pointing to a file, they execute special commands in DEVONthink. Though not as powerful as AppleScript, these commands can be used in special circumstances.

TERMINOLOGY

The URLs are constructed from a single command and optional parameters, with the following format:

```
x-devonthink://<command>?
<parameter=value&parameter=value&...>
```

> Note: The first parameter after the ID is always added after a question mark (?), additional ones after an ampersand (&), and any values must be percent-encoded.

Listed below are the commands and parameters available:

Commands:

- **createFormattedNote:** Creates a formatted note.
- **createHTML:** Creates a new HTML document.
- **createMarkdown:** Creates a Markdown document.
- **createPDF:** Creates a PDF.
- **createRTF:** Creates a rich text document.
- **createWebArchive:** Creates a web archive.
- **createBookmark:** Creates a new bookmark.

> Note: Use the `location` parameter set to a URL with the commands above to download the page in the specified format.

- **createGroup:** Creates a group.
- **createText:** Creates a new plain text document.
- **clip:** Opens the Clip to DEVONthink panel.
- **note:** Opens the Take Note panel.
- **search:** Initiates a search in the open databases.

Parameters:

- **title:** The title of the item to be created (string).
- **comment:** A Comment to be added (string).
- **location:** The URL linking to the content, e.g., the URL of the website for the bookmark (URL).
- **tags:** Tags to be added (comma separated strings).
- **destination:** The UUID of a group where the item shall be created (string).
- **source:** The HTML content for HTML documents (string, only used by `createHTML` and `createFormattedNotes`).
- **text:** The text content for text documents (string, used by `createText` and `createMarkdown`).
- **width:** The page width (integer, only used by `createPDF`).
- **paginated:** Paginate the created PDF (boolean, only used by `createPDF`).
- **hide:** Hide and deactivate application after executing the comment (boolean).
- **noselector:** Skip group selector (boolean).
- **query:** The query to search for (string, only used by `search`).

- **reader:** Post-process the page (integer, 0 = no post-processing, any other value = post-process).
- **referrer:** The URL that referred to the item (URL).
- **selection:** The selected text (string, only used by `createRTF`).

Example:

```
x-devonthink://createRTF?title=New
%20bookmark&location=http%3A%2F
%2Fwww.devontechnologies.com&noselector=1
```

Note: These are not x-callback-urls. An x-callback-url is a specific type of URL scheme that returns a value to the calling application.

APPENDIX

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In the appendices you will find a wealth of additional information that helps you getting familiar with DEVONthink, such as a glossary of commonly used terms, a listing of the Boolean operators used in searches, commonly found context menu items, and much more.

GLOSSARY

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

INTERFACE ELEMENTS

Get familiar with the names of part of DEVONthink windows.

- **Bars:** Smaller sections of a window providing specialized information or controls, e.g., the Information Bar found just above the item listing. It shows information about the selection as well as buttons to sort or change the view.
- **Context menu:** The menu that appears when you *Control-click* something. The context menu gives you access to frequently used commands that deal directly with the clicked object. Specific context menu items are discussed in their respective sections, but there is a list of commonly seen commands in the Context Menu Items section of this appendix.
- **Inspectors:** Specialized panes at the right of a main window, providing information about the current selection as well as functions like See Also & Classify.
- **Item list:** The list of items in the current location, viewable as a list, icons, columns. Items can be documents, groups, or smart groups.
- **Popover:** A specialized type of window that appears at a specific location, e.g., the toolbar, opened via a toolbar button or menu command. *Database Properties* is a type of popover.
- **Sidebars:** The panes found at the left side of a main window, comprised of the *Navigate*, *Reading List*, *Import*, *Extras* sidebars.
- **View:** The layout of the item list and view/edit pane in a main window, either *Standard* or *Widescreen*. You can change

the layout using the commands found in the *View* menu.

- **View/Edit pane:** The pane in main windows where the content of selected documents is shown or edited. This pane can be hidden by choosing *View > None*.
- **Window:** DEVONthink uses three different types of windows: main, document, and other. Main windows show lists of items and, in some views, also the contents of the selected document, whereas document windows can be opened for individual documents.

DOCUMENTS & GROUPS

- **Database:** A collection of all documents stored in DEVONthink. You can create and open as many databases as you like.
- **Document:** A file in the database; for example, a plain or RTF text, a PDF, or an image (.jpg, .tiff, .png, etc.). Technically a document is an entry in a database with text, RTF, or image content, sometimes simply referred to as "content".
- **Default destination:** The default destination group for incoming data. Set in *Settings > Files > Import.*
- **Duplicate:** A copy of a file, either explicitly created or detected by DEVONthink's AI.
- **Group:** A collection of documents or other groups inside the database. Similar in appearance and behavior to a folder in the Finder. See also p. 201ff
- **Global Inbox:** A special database serving as a destination for incoming data. The *Global Inbox* is always opened when DEVONthink is started and accessible through the sidebar. The *Global Inbox* can be set as the default destination in *Settings > Files > Import*.
- **Inbox:** A special group for data coming in to a database. Every database has an *Inbox* group.
- **News feed:** Also referred to as *RSS*, a news feed is like a web page, but split into multiple articles. A feed reader or web browser can split the feed "page" into its parts and show each of them as a separate news item and/or store it in a local database. DEVONthink stores feeds in a database and displays them like a group. The contents are updated live from the internet as the connected feed changes. Older news bits are kept, while fresh news bits are added and marked as unread. When you add a bookmark that points a feed, DEVONthink tries to add it as a proper feed document if possible.
- **Replicant:** A document or a group that appears in more than one place in the database. Unlike an alias in the file system, a replicant is not a real document pointing to another file (usually the original); rather it is a second entry in the table of contents for the very same document. Consequently, there is no original; when you replicate a document you'll end up with two replicants.
- **Sheet:** A collection of records or structured sets of data, presented in a spreadsheet style, similar to data viewed in Apple Numbers or Microsoft Excel. Alternatively, the data can be displayed in form view, similar to browsing records in, e.g., FileMaker.
- **Smart group:** A special type of group with a set of search criteria saved with it. This is similar to "Saved Search" folders in the

Finder. Every time you visit this smart group, DEVONthink runs the attached search and displays it as the content of the group. DEVONthink creates a number of pre-defined smart groups when you create a new database.

- **Trash:** A temporary location in a database for deleted files. Similar to the Trash in the Finder, all trashed items are stored until you explicitly delete them using *DEVONthink > Empty Trash*.

TAGS

- **Group tag:** Groups within a database that apply their name as tags to their contents. Items moved out of these groups will not retain the group tags. Group tags appear grey in all tag lists.
- **Ordinary tag:** Tags created through the *Tag* bar or other means are created in a special top-level *Tags* group. They are called "ordinary tags" and appear blue in all tag lists.

See the Iconology section for icons specific to these two items.

ITEM PROPERTIES

- **Flagged/Unflagged:** Items can be checked or unchecked for your personal use, e.g., for creating a to-do list, maintaining a shopping list, or writing a list of project tasks.
- **Locked/Unlocked:** Items can be locked to keep them from being unintentionally deleted (groups, documents) or modified (documents).
- **Read/Unread:** Items can be marked read or unread, which is useful for captured or automatically downloaded news items or documents that you want to read later. Both unread items and groups containing unread items are shown in bold.
- **UUID:** Each database, group, or document in DEVONthink receives a unique identifier (UUID) when it's created. This is a read-only alphanumeric string that refers only to the particular item. The UUID allows you to reference an item regardless if its location or name changes, and is usually found in item links.

See the Iconology section for icons specific to the *flagged*, *locked*, or *unread* states.

SYNCHRONIZATION

- **Sync location:** Sync locations are used to keep your databases on all your devices in sync. They summarize all information about which databases to sync through what kind of connection (e.g., direct connections to DEVONthink on a Mac, WebDAV, CloudMe, Dropbox etc.) and with which sync store.
- **Bonjour (Direct connection):** A sync method for syncing one device to another Mac or mobile device running DEVONthink or DEVONthink To Go, respectively. Unlike other sync methods, there is no intermediary storage location for the sync data. It is direct - device to device.
- **Sync store:** A sync store is a special folder containing sync data. These can be direct, local, e.g., on your Mac or a thumb drive, or remote, as used with cloud services.
- **Encryption key:** A user-defined word used to "scramble" or "unscramble" your sync data when syncing. When used, your sync data is stored in an encrypted state in the sync store.

- **Local database:** A database that exists and is open on this device.
- **Remote database:** A database that is not open on this device, or exists at the sync location, e.g., on Dropbox, but has not been downloaded to this device.
- **Pending document:** A document for which only the metadata is locally available. This is usually caused by choosing not to synchronize indexed files for the sync location.
- **WebDAV:** A type of web server used by some cloud services, some network attached storage devices, sometimes running locally. It can often be used by DEVONthink for syncing.

AI

- **AI model:** An umbrella term for different types of AI, e.g., text generation with ChatGPT, image generation via DALL-E.
- **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.
- **Generative AI:** A type of AI capable of *creating images*, videos, music, etc. DEVONthink supports image creation.
- **Hallucination:** An incorrect or irrelevant AI response. This is less common as large commercial LLMs improve but still possible as the responses aren't validated. 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 chat, e.g., via the *Chat inspector*, *Chat popover*, or even AI assisted automations.
- **RAG:** The acronym for Retrieval Augmented Generation, this is the process by which a document is parsed by an AI model into a specialized database. This database is then used to answer questions about the specific document. These are generally only available in commercial AI models, like Claude.
- **Role:** A "persona" sent to the AI used to direct the responses, representing you, the AI, or both. For example, your role could be "I am in an undergraduate anatomy class…" or "You are presenting to a roomful of young astronomers…".
- **Speech-to-Text:** A type of AI capable of *converting speech* in audio and video files into text. DEVONthink supports this.
- **Tokens:** Tokens are how words are processed by AI. Some words are treated as a token; others are split into separate tokens. This is controlled by how the LLM is built. Bear in mind, you typically pay per token when using a commercial AI service though the cost-per-token is usually small.
- **Tools:** AI capable of accepting DEVONthink-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 behind item names, e.g., in *main windows*, indicate that the item has been indexed instead of imported, is locked, has a comment or annotation attached, is encrypted, e.g., PDFs or encrypted databases, or has a triggered script attached. Groups also serving as tags show a tag icon. Depending on your preferences, replicants, duplicates, or replicated duplicates are indicated with a little grey icon instead of appearing in color.

- Item has encryption applied, e.g., encrypted PDFs, and encrypted database, or an encryption key has been specified for a sync location in *Settings > Sync*.
- Database is an revision-proof archive.
- Item is unread.
- Item has been flagged.
- Item is indexed, not imported.
- Item is locked.
- Item has a comment.
- Item has an associated annotation file.
- Item has a reminder set.
- Item has outgoing item links.
- Item has incoming item links.
- Item has a script attached.
- Item has an attachment (email messages only).
- Item is pending—synced but its content is not (yet) downloaded.
- Item is a duplicate.
- Item has one or more replicant(s).
- Item is a duplicate, but also has one or more replicant(s).

TOOLBAR ITEMS

DEVONthink provides a wide variety of toolbar items, giving you quick "push-button" access to many everyday tools.

DEFAULT ITEMS

The following toolbar buttons are available in the default set you see when you first launch DEVONthink:

- **Sidebar:** Show and hide the global sidebar.
- **Preview: None:** Hides the document preview.
- **Preview: Standard:** Shows the document preview below the item listing.
- **Preview: Widescreen:** Shows the document preview besides the item listing.
- **New:** Adds documents in DEVONthink-native formats. Similar to *Data > New*.
- **Actions:** Contains the context menu for items selected in the item listing..
- **Open:** Opens the current item in a DEVONthink window if possible.
- **Open externally:** Opens the current document in the system default application.
- **Share:** Opens the macOS Share menu for the selected items. This does not apply to groups.
- **Mark: Flagged:** Changes the flagged state of the selected item.
- **Mark: Read:** Changes the read statue of the selected item.

- **Mark: Locked:** Changes the locked state of the selected item.
- **Label:** Changes the label color of the selected item.
- **Synchronize:** Initiates a manual sync of the current database.
- **Search:** This is the main search bar, accessing all or specific groups and databases.
- **Log:** Opens a popover showing available messages from the Log window.
- **Get Info:** Opens a popup from the button displaying a number of commonly used inspectors.
- **Show/Hide Tags:** Shows or hides the *Tags* bar under a document's preview.
- **Show/Hide Inspectors:** Shows or hides the *Inspector* panes.

ADDITIONAL ITEMS

In addition to the default set, there are many other specific buttons available, shown in the order found in the *View > Customize Toolbar* sheet:

- **Scripts:** Provides access to the contents of the *Scripts* menu.
- **Quick Look:** Opens a Quick Look preview for the selected document.
- **Zoom:** Changes the magnification of the document being viewed: *+*, *-*, or click *1* for actual size.
- **Zoom to Fit:** Sets the magnification of the current item to fit the bounds of the view/edit pane.
- **Zoom to Width:** Sets the magnification of the current item to the width of the view/edit pane.
- **Full Screen:** Displays the current document in DEVONthink's full screen mode.
- **Groups: Group:** Creates a new group in the current location.
- **Groups: Smart Group:** Creates a new smart group in the current location.
- **Group:** Groups the selected items into a new group.
- **Ungroup:** Ungroups the selected group and deletes the now-deserted empty group.
- **Classify:** Attempts to classify the current item.
- **Plain Text:** Creates a plain text file in the current location.
- **Markdown Text:** Creates a Markdown file in the current location.
- **Rich Text:** Creates a rich text file in the current location.
- **Formatted Note:** Creates a formatted note in the current location.
- **Sheet:** Creates a sheet in the current location.
- **Bookmark:** Create a bookmark in the current location.
- **Launch URL:** Opens a URL associated with the current item in the system default browser.
- **Add to Reading List:** Adds selected documents to the *Reading List* sidebar.
- **Save:** Explicitly save changes to a document.
- **Delete:** Moves the current item to the database's trash.
- **Print:** Prints the selected document. If a document cannot be printed, the item listing will be printed.
- **Import:** Imports files into the current location.
- **Export:** Provides access to the contents of the *File > Export* menu.
- **Update:** Manually updates (indexed) items in a database.

- **Show in Finder:** Opens a Finder window revealing the document's location in the filesystem. Be cautious with this button. When used on imported files, it will reveal them in the internals of the database. You do not want to modify these internal files in the Finder. This option is best used on indexed files.
- **Reveal:** Reveals a file in its location in a database. Used with items selected in smart groups or search results.
- **Merge:** Merges multiple files into one, leaving the originals intact.
- **Merge and Delete:** Merge multiple files into one, putting the originals in the database's trash.
- **Batch Process:** Open
- **Optimize:** Does an internal optimization and backup of a database's metadata.
- **Verify:** Checks the integrity of the database and repairs items it can. Please refer to the troubleshooting chapter for information on database maintenance and repairs.
- **Database Archive:** Creates a compressed archive of a selected database. This works the same as the *File > Export > Database Archive* command.
- **Send by Email:** Creates a new message in your default email app and attaches selected items. Be aware the ability to add attachments depends on the inter-application capabilities of the email application.
- **Take Note:** Opens the *Take Note* view, either in the *Sorter* or a *Take Note* panel.
- **Synchronize All:** Initiates a manual sync of all open and actively syncing databases.
- **Chat:** Opens the Chat popover.
- **Imprinter:** Provides access to any imprints available in the *Tools > Imprinter* menu.
- **OCR:** Runs OCR on a compatible file, e.g., PDFs or images, producing the selected output type.

CUSTOM ITEMS

If you are creating scripts or templates, they will be available to add to the toolbar after quitting and relaunching DEVONthink. See the appropriate sections for information on where to save these files for use in the toolbar.

INTERFACE SHORTCUTS

For some people, navigating an application via keyboard shortcuts feels much more efficient. Below are some shortcuts for getting around the interface. Some are common to most Mac applications; others are specific to DEVONthink. And if you're looking for hotkeys for command shortcuts, we also have those listed.

There are a few keys found only on extended keyboards. Here are the equivalents available on laptops using the Function key:

Extended Keys:

- **Home:** Function-Left arrow
- **End:** Function-Right arrow
- **Page Up:** Function-Up arrow
- **Page Down:** Function-Down arrow

WINDOWS

- **Control-Tilde (~):** Cycles through open application windows. This is a common macOS shortcut.
- **Control-Tab:** Cycles focus between the sidebar, item list, view/edit pane, the Tags bar, and inspectors, depending on what elements are visible.
- **Escape:** Cancels processes, closes dialogs or Quick Look previews, etc., depending on the context.
- **Command-}:** Cycles to the next tab.
- **Command-{:** Cycles to the previous tab.

> Note: Hold ⇧ to cycle in reverse order.

DOCUMENT LISTS

Navigating items:

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

Selecting items:

- **Shift-click:** Selects consecutive items.
- **Shift-arrow:** Extends the next consecutive item to the current selection.
- **Command-click:** Adds a non-consecutive item to the selection.

Manipulating items:

- **Return:** Renames documents.
- **Backspace:** Deletes selected items.
- **Command-Drag:** When dragging items from the Finder, this moves, not copies, the file into the database.
- **Option-drag:** Duplicates items to the drag destination instead of moving it.
- **Command-Option-drag:** Creates replicants for the items at the drag destination. Dragging items from the Finder to DEVONthink with ⌥⌘ pressed indexes the item. Dragging items into documents with ⌥⌘ held inserts a link to the item.

Item List:

- **Command-Shift-O:** Opens a selected document in the system default application.
- **Tab:** Jumps to the first or next editable column when using the *item list* in *List* view.
- **Space:** Opens the standard Quick Look panel showing a preview of the selected items.
- **Option-Space:** Opens a full screen Quick Look slideshow.
- **Command-bracket:** Using *[* and *]*, goes backwards and forwards through the visited locations.

VIEW/EDIT PANE

The first section of shortcuts are generally applicable to documents like Markdown, rich text, etc. Keys more specific to other formats are listed separately.

- **Home/End:** Goes to beginning or end of any view.
- **Page up/down:** Scrolls one page up and down in any view.
- **Space/Shift-Space:** Scrolls one page down or up in non-editable views, e.g., web pages, images, or PDF documents.
- **Command-click:** Opens the target of a link in a new tab or separate window.
- **Command-Shift-click:** Opens a link in a new tab and activates it. This requires enabling tabbed browsing in *Settings > General*.
- **Option-click (a link):** For HTML-based files, adds the clicked URL to the Download Manager panel.
- **Option-click (a word):** Initiates a search with the clicked word as the search term.
- **Option-drag:** Selects text using a rectangular selection ribbon.
- **Command-Option-drag:** Inserts a cross-link for groups or documents dropped into a rich text document. Dragging files or folders from the Finder to a rich text document with ⌥⌘ pressed creates links to them.

PDFs and Images:

- **Control-Shift-Command- +:** Zooms in.
- **Control-Shift-Command- —:** Zooms out.
- **Command-0:** Display at actual size.
- **Command-=:** Zoom to fit.
- **Control-Command-W:** Zoom to width.
- **Command-drag:** Scrolls the visible area with the mouse.

Sheets:

- **Return:** Moves one cell down for editing.
- **Shift-Return:** Moves one cell up for editing.
- **Tab:** Moves one cell to the right for editing.
- **Shift-Tab:** Moves one cell to the left for editing.
- **Arrows:** Moves the editing selection.
- **Escape:** Stops editing.

Multimedia:

- **Spacebar:** Start and stop playback.
- **Left/Right Arrows:** Move forward or backward one frame or .25 second.
- **Option-Left/Right Arrows:** Jump to the beginning or end of the file.
- **Shift-Left/Right Arrows:** Move forward or backward in 15 second intervals. The Shift-interval is customizable in the hidden preferences.
- **Command-Left/Right Arrows:** Change forward or reverse playback speeds.
- **Option-Forward/Reverse buttons:** Hold the Option key and click the forward or reverse buttons to change playback speeds in .1 increments, e.g., 2.1, 2.2, etc.
- **Up/Down Arrows:** Adjust the playback volume. Hold Option to switch between mute and full volume.

> Note: These keys operate when a multimedia file is playing in a document window. They are not global controls, i.e., they will have no effect on an audio file playing in a minimized window.

THE SORTER

Views: You can jump to a specific view by pressing Option-Command and 1 through 6, starting at the *Navigation* view.

General Note Creation and Clipping:

- **Command-S:** Saves the entered data. Equivalent to clicking *Add*.
- **Escape:** Clears any entered data. Equivalent to pressing the retreating circle icon.

Voice and Video Note:

- **Spacebar:** Start and stop recording.

Screen Capture:

- **Command-1:** Capture the entire window.
- **Command-2:** Capture a highlighted window.
- **Command-3:** Capture a selected area.

Both of the next two functions use the *Web Clip* view. However, when opened via the *Clip To DEVONthink* browser extension, the hotkeys have different functions.

Web Clip:

- **Command-1:** Clips from the default browser.
- **Command-2:** Clips from a URL you've copied to the clipboard.
- **Command-3:** Type a URL to clip and any associated data, e.g., comments, tags, etc..

Clip to DEVONthink:

- **Command-F:** Toggles the *Clutter-free* option.
- **Command 1-9:** Chooses the format to clip to (in order from 1): *Plain Text*, *Rich Text*, *Bookmark*, *Formatted Note*, *HTML Page*, *Markdown*, *Web Archive*, *PDF (One Page)*, and *PDF (Paginated)*.

CONTEXT MENU ITEMS

DEVONthink's menus are full of powerful commands. But many of them are also found in its context menus, shown when you Control-click certain elements in the application. This provides quicker access to certain functions, streamlining your experience. As the name implies, the commands are contextual so the available functions depend on what is selected or clicked on. For example, the *OCR* commands are only shown if an image or PDF document is in your selection. Below is a list of common menu items available in the context menus for documents and windows.

ITEM LIST

These context menu items are commonly shown when you Control-click in an *item list*. As other interface elements, e.g., the *AI > See Also* have item lists, you will find many of these commands when you Control-click in them too.

New Documents: You will see the *Data > New* and *New from Template* commands when using the context menu in the item list of a main window.

- **Add To:** Commands in this submenu add the currently selected documents to your *Favorites* or the *Reading List*.
- **Apply Rules:** Runs a chosen smart rule on selected items matching the location and criteria of the rule.
- **Batch Process:** Choose an existing batch processing configuration or open then*Batch Process* window.
- **Classify to:** Classifies the selected item to the best matching group shown in the

See Also inspector. If multiple items are selected, this changes to *Classify*.

- **Convert:** This submenu displays options for converting from one file type to another. The options shown here are dependent on the type of file selected.
- **Copy Item Link:** Copies a link to the current item.
- **Copy URL:** Copies the URL of the selected document to the clipboard. This only appears when one document is selected.
- **Duplicate To:** Duplicates the selected item to the group you select from the submenu.
- **Get Info:** Opens a popup containing more detailed information about the currently selected file or group.
- **Group Items:** Groups multiple selected items in an item list.
- **Label:** Changes the label of the selected item.
- **Launch URL:** Opens the URL in the selected item's URL field. Hold the ⌥ Option key to choose *Launch URL in Background*. This keeps DEVONthink in the foreground.
- **Mark:** Change the flagged, locked, or read status of the selected item.
- **Merge n Documents:** Merges the selected documents. This command only appears when more than one document is selected. Hold the ⌥ Option key to use *Merge & Delete n Documents*
- **Move Into Database:** Moves an indexed item into the database. Use this command with caution as it moves the file from its current location into the internals of your database. It does not copy the file.
- **Move To External Folder:** Moves a non-indexed item, e.g., imported or created in DEVONthink, out to an indexed folder in the Finder if located in an indexed group in your database.
- **Move To:** Moves the selected item to the group you select from the submenu.
- **Move to Trash:** Moves the item to the Trash. Holding the ⌥ Option key changes this to *Move All Replicants to Trash* to clean up unwanted replicants.
- **Open:** Opens the selected item in a separate main window or document window.
- **Open in Tabs:** Hold the ⌥ Option key to access *Open in Tabs*. If the *view/edit* pane is visible, this opens the selected items in new tabs. If the pane isn't visible, a new document window opens with each selected document in its own tab.
- **Open With:** Opens the selected item in an external application.
- **Put Back:** Moves an item back to its previous location, if possible, e.g., after trashing, moving, or classifying a document.
- **Rating:** Allows you to set a rating, from no stars to five stars.
- **Replicate To:** Replicates the selected item to the group you select from the submenu.
- **Remind Me:** Adds a due date or clears a reminder from the selected document.
- **Reveal:** Shows and selects the selected item in its location in DEVONthink.
- **Send by Email:** Attaches the selected item into a draft email, if supported by your email application.
- **Share:** Opens the Share menu.
- **Show in Finder:** Shows the selected item in the Finder. Be cautious when using this command with imported items.
- **Tags:** This submenu offers special commands for automatically adding or

removing tags. See the Tagging > Tagging Sources section of the manual for more information.

- **Thumbnails:** This submenu allows you to *Create*, *Update*, or *Remove* the thumbnail for a file.
- **Ungroup Items:** Ungroups a group, leaving its contents behind. The group is not preserved.

- **Group Similar Items:** Groups selected documents into contextually related groups when holding the ⇧ Shift key.
- **Imprinter:** Choose an imprint you've defined in Settings > Imprinter to apply it to the current image or PDF.
- **OCR:** Choose the output file type and convert to the chosen format via OCR.
- **Recognition:** Use *AI* to process images, including barcode detection, or transcribe media files to text.

> Note: These specific commands are only shown when a selection contains files that can be processed by them: *Imprinter*, *OCR*, and *Recognition*. This includes selected groups containing these documents.

NAVIGATE SIDEBAR

New Databases: No matter what section of the *Navigate* sidebar in which you open the context menu, you will see these commands: *New Database*, *New Encrypted Database*, *New Revision-Proof Database*. This makes it easy to spin up a new database at any time.

The commands listed alphabetically below may be seen when opening the context menu in the various sections of this sidebar. Again, the commands are contextual so where you open the menu or what is selected dictates the available commands. For example, the *Add to Favorites* command logically isn't shown when Control-clicking an item in the *Favorites* section.

> Note: Context menu commands for the other sidebars as well as the inspectors are covered in their respective sections.

- **Add to Favorites:** Add the selected item to the *Favorites* section.
- **Copy Database Link:** Copies the unique URL for the selected database.
- **Close Database:** Closes the chosen database. In the case of encrypted databases, the encrypted volume will be ejected as well.
- **Copy Database/Item Link:** Copies the unique URL of a selected item or database..
- **Database Properties:** Opens the *Database Properties* popover for the selected database.
- **Delete Database:** Deletes a database. This doesn't have to be the active database. This command also requires confirming the deletion.
- **Empty Trash:** Empties the Trash of all open databases.
- **Expand/Collapse All:** Opens or closes all the subgroups within a selected group.
- **Get Info:** Opens the Generic Info popover for the selected group, including inboxes.
- **Label:** Applies a color label to the group, not its contents.
- **Mark:** Sets the locked, flagged or read state of the contents of the group.
- **Move to Trash:** Moves the selected group to the database's Trash.
- **New Database/revision-Proof/Encrypted:** Create a new database of the chosen type.

- **New Feed:** Create a new RSS feed in the selected group or database.
- **New Group/Tag:** Creates a new group or tag, relative to the selected item.
- **New Smart Group/Smart Rule:** Create a new group or Smart rule.
- **New Window:** Opens the selected item in a new main window.
- **Rename:** Change the name of the chosen database. This can also be done in the *Database Properties*.
- **Reveal:** Display the location of the item and select it in the item list.
- **Show in Finder:** Reveal the data in a Finder window.

DOCUMENT CONTENTS

The context menu is shown in the view/edit pane for documents provides commands based on whether there is a selection or not. Some commands are also only available when a limited number or words or links are selected in the text. Also, some are relative to the file type, e.g., shown for PDF documents. Format-specific commands are described in their respective sections in the Documents chapter. This includes special item links, like page links.

The following alphabetical list covers context menu commands you may see when working with documents in the *view/edit* pane.

> Note: Proprietary formats viewed via QuickLook won't display a context menu unless they support the *View > Document Display > Text Alternative* view.

- **Add Link to Reading List:** Adds a link to the *Reading List*.
- **Add Link:** Allows you to enter a URL for the selected text, converting the text to an active link.
- **Add tag [word]:** Tags the document with the selected word (only available if the word is not already a tag of the document).
- **Capture with Source Link:** Opens the *Sorter* with the selected text and a link to the document.
- **Convert to Item Link:** Converts a selected WikiLink into an item link. An alternate command, available when holding the ⌥ Option key, *Convert All to Item Links* converts all WikiLinks in the current document into item links. These commands only apply to plain text, rich text, and Markdown documents.
- **Copy Link:** Copies a clicked link to the clipboard (only available for selected links).
- **Edit Link:** Edit or remove the URL of a selected link.
- **Insert Link To:** Inserts a link to an item you select in the submenu when no text is selected.
- **Insert Placeholder:** Inserts a predefined placeholder or one specified as custom metadata in Settings > Data.
- **Highlight:** Highlights the selection with the current highlight color. Using this command on a selection again removes the highlighting.
- **Link To:** Converts selected text into a link to a group or document you select in the submenu.
- **Look Up [word]:** Looks the selected text up in macOS's Dictionary.
- **Make Link:** Converts selected piece into a WikiLink. The destination of the WikiLink

is a document with the same name as the selected text. If no document with that name exists, clicking the created link creates it using the template you have set in the Settings > WikiLinks.

- **Open Link in Browser:** Opens the selected link in the default browser or application.
- **Open Link in DEVONagent:** Opens the selected link in a DEVONagent Pro browser window.
- **Open Link in New Tab:** Opens the selected link in a new tab in DEVONthink.
- **Open Link in PhotoStickies:** Opens a link in PhotoStickies.
- **Open Link:** Opens the selected link.
- **Quick Look Attachments:** Opens a QuickLook window for both item links and WikiLinks in plain text, rich text, and Markdown documents. Selecting a text block with multiple links opens a QuickLook window for all detected links.
- **Remove Link:** Use this to remove the link status of selected text.
- **Search with Google:** Searches for the selected text in Google.
- **Search [word]/Selected Phrase:** Searches for the selected word or phrase in your open databases.
- **See Related Text:** Displayed like search results, this shows a list of documents related to the selected text passage. This option is only available when more than one word is selected.
- **See [word]:** Opens a drawer with documents related to the selected word.
- **Set Name As:** Sets the name of the document to the selected piece of text (needs to be less than 256 characters).
- **Services:** Displays the macOS Services menu.
- **Share:** Shares selected text via the available sharing extensions.

- **Add Link to Downloads:** Adds a link to the *Download Manager*.
- **Summarize via Chat:** Opens the *Summary and Transform* popover for the selected text.

COMMAND KEYS

Below are the factory default shortcuts for the commands in DEVONthink's menus. The main commands, those visible when you open the menu, are listed first. Shortcuts for submenu commands are listed separately. Any alternate commands, e.g., those that are available when holding the ⌥ Option key are listed directly after the related command.

This listing uses Apple's standard command key symbols:

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

There are also a few commands using buttons only found on extended keyboards. These are listed by name. However, there are equivalent key combinations available on laptops using the Function key:

Extended Keys:

- **Home:** Function-Left arrow
- **End:** Function-Right arrow
- **Page Up:** Function-Up arrow
- **Page Down:** Function-Down arrow

THE APPLICATION MENU

Shortcuts found in the *DEVONthink* menu.

- **Preferences:** ⌘,
- **Empty Trash:** ⇧⌘⌦
- **Hide DEVONthink:** ⌘H
- **Hide Others:** ⌥⌘H
- **Quit DEVONthink:** ⌘Q
- **Quit and Keep Windows:** ⌥⌘Q

THE FILE MENU

Shortcuts found in the *File* menu, including the *New Window*, *Export*, and *Close Database* submenus.

- **Index Files and Folders:** ⌥⌘X
- **Update (Indexed) Items/Refresh Feed:** ⌥⌘S
- **Synchronize Database:** ^⌥S
- **Synchronize All Databases:** ^⌥⇧S
- **Database Properties:** ⌥⌘P
- **Verify & Repair Database:** ⇧⌘Y
- **Check File Integrity:** ^⇧⌘Y
- **Optimize Database:** ⇧⌘K
- **Restore Backup:** ⌥⇧⌘K
- **Page Setup:** ⇧⌘P
- **Print:** ⌘P

New Window

- **New Window:** ⌥⌘N

Close Database

- **Close current database:** ⇧^⌘W
- **Close All:** ⇧^⌥⌘W

THE EDIT MENU

Shortcuts found in the *Edit* menu, including the *Find*, *Spelling and Grammar*, and *Insert* submenus.

- **Undo:** ⌘Z
- **Redo:** ⇧⌘Z
- **Cut:** ⌘C
- **Copy:** ⌘X
- **Copy with Source Link:** ⇧⌘C
- **Copy Item Link:** ^⌥⌘C
- **Copy Page/Selection/Paragraph Link:** ^⌥⇧⌘C
- **Paste:** ⌘V
- **Paste & Match Style:** ⌥⇧⌘C
- **Complete:** ⌥Escape
- **Select All:** ⌘A
- **Deselect All:** ⇧⌘A
- **Tags:** ^Return
- **Set Name As:** ^⌘I
- **Emoji & Symbols:** ^⌘Space

Find

- **In Database:** ⌥⌘F
- **Find:** ⌘F
- **Find Next:** ⌘G
- **Find Previous:** ⇧⌘G
- **Use Selection for Find:** ⌘E
- **Scroll to Selection:** ⌘J

Spelling and Grammar

- **Show Spelling and Grammar:** ⌘:
- **Check Document Now:** ⌘;

Insert

- **Bullet:** ⇧⌘B
- **Date:** ⇧⌘D
- **Item Link:** ^⌘E

THE DATA MENU

Shortcuts found in the *Data* menu, including the *New*, *Open With*, and *Mark* submenus.

- **Open:** ⌘O
- **Launch URL:** ^⌘U
- **Reveal:** ⌘R
- **Save:** ⌘S
- **Save All:** ⇧⌘S
- **Duplicate:**
- **Move To:** ^⌘M
- **Move to… Again:** ⌥⌘T
- **Group Items:** ⌥⌘G
- **Group Similar Items:** ⌥⇧⌘G
- **Ungroup Items:** ⌥⌘U
- **Move To Trash:** ⌘Delete

New

- **New From Clipboard:** ⌘N
- **Plain Text:** ^⌥⌘N
- **Rich Text:** ^⌥N
- **Group/Tag:** ⇧⌘N

Open With

- **Default application:** ⇧⌘O

Mark

- **As Flagged:** ⌥⌘K
- **As Unread:** ⌘K
- **As Locked:** ^⌘K

THE FORMAT MENU

Shortcuts found in the *Format* menu, including the *Font*, *Style*, *Alignment*, and *Ruler* submenus.

- **Make Rich/Plain Text:** ⇧⌘T
- **Highlight:** ⇧⌘L
- **Make Link:** ⇧⌘M
- **Typewriter-like Scrolling:** ⌥^T
- **Wiki Linking:** ⌥^L
- **WYSIWYG Editing:** ⌥^E
- **Show/Hide Format Bar:** ⇧⌘F
- **Show/Hide Editing Bar:** ⇧⌘E

Font

- **Show Fonts:** ⌘T
- **Bigger:** ⇧⌘=
- **Smaller:** ⌘—
- **Copy Font:** ⌥⌘C
- **Paste Font:** ⌥⌘V

Style

- **Bold:** ⌘B
- **Italic:** ⌘I
- **Underline:** ⌘U
- **Strike Through:** ^⌘S
- **Styles:** ^⌘T

Alignment

- **Align Left:** ^⌥⌘L
- **Align Right:** ^⌥⌘R

Ruler

- **Show/Hide Ruler:** ⇧⌘R
- **Copy Ruler:** ^⌘C
- **Paste Ruler:** ^⌘V

THE TOOLS MENU

Shortcuts found in the *Tools* menu, including the *Inspectors*, and *Filter* submenus.

- **Get Info:** ⇧⌘I
- **Chat:** ^⌘A
- **Graph:** ^⌘H

Inspectors

- **Show/Hide:** ⌥⌘I
- **Generic:** ^1
- **Custom:** ^2
- **Properties:** ^P
- **Annotations & Reminders:** ^3
- **Table of Contents:** ^4
- **Thumbnails:** ^5
- **Annotations:** ^6
- **Attachments:** ^7
- **Links:** ^8
- **Mentions:** ^9
- **See Also & Classify:** ^S
- **Search:** ^U

Filter

- **Info:** ^I
- **Tags:** ^T
- **Multimedia:** ^M
- **Maps:** ^G

Flip

- **Rotate Right:** ^⌘R
- **Rotate Left:** ^⌘L

Batch Process

- **Batch Process:** ⌥⌘B

THE VIEW MENU

Shortcuts found in the *View* menu, including the *Full Screen*, *Zoom*, and *Document Display* submenus.

- **Navigate:** ⌥⌘1
- **Reading List:** ⌥⌘2
- **Import:** ⌥⌘3
- **Extras:** ⌥⌘4
- **as Icons:** ⌘1
- **as List:** ⌘2
- **as Columns:** ⌘3
- **None:** ⌘5
- **Standard:** ⌘6
- **Widescreen:** ⌘7
- **Quick Look:** ⌘Y
- **Show/Hide Tags:** ^⌥⌘T
- **Show/Hide Details:** ⌥⌘L
- **Show Only Documents:** ^⌥⌘D

Full Screen

- **Document:** ⌘F7
- **Window:** ^⌘F

Zoom

- **Actual Size:** ⌘0
- **All Pixels:** ⇧⌘X
- **Zoom In:** ^⇧⌘=
- **Zoom Out:** ^⌘—
- **Zoom To Fit:** ⌘=
- **Zoom To Width:** ^⌘W

Document Display

- **Best Alternative/Table View/Preview:** ^⌘P
- **Text Alternative/Form View/Source:** ^⌘X
- **Side-by-Side:** ^⌘Y

THE GO MENU

Shortcuts found in the *Go* menu. Note a few commands are marked with the extended keys mentioned at the beginning of this section, e.g., *Home*.

- **Previous Database:** ⌥⌘R
- **Next Database:** ⌥⌘E
- **Top Group:** ⌥⌘Home
- **Enclosing Group:** ⌥⌘up arrow
- **Selected Group:** ⌥⌘down arrow
- **To Group…:** ⌘L
- **First Document:** ⌘Home
- **Previous Document:** ⌘Page Up

- **Next Document:** ⌘Page Down
- **Last Document:** ⌘End
- **To Group:** ^⌘G
- **To Document:** ^⌘O
- **To Page/Line:** ⌥⇧⌘P
- **To Link:** ⇧⌘↩
- **Back:** ⌘[
- **Forward:** ⌘]
- **Previous Instance:**
- **Next Instance:**
- **Previous Highlight:**
- **Next Highlight:**
- **Next Unread Item:** ⌘↩
- **Complete News:** ⌥⌘↩
- **Move Focus to Sidebar:** ^⌥⌘S
- **Move Focus to View:** ^⌥⌘V
- **Move Focus to Preview:** ^⌥⌘P
- **Move Focus to Inspector:** ^⌥⌘I

Workspaces: Workspaces you create will be automatically assigned a shortcut of ⌥⇧⌘1, ⌥⇧⌘2, etc. up to the ninth workspace.

THE WINDOW MENU

Shortcuts found in the *Window* menu.

- **Close:** ⌘W
- **Close All:** ⌥⌘W
- **Minimize:** ⌘M
- **Minimize All:** ⌥⌘M
- **New Tab:** ^⌘,
- **Select Next Tab:** ⌘}
- **Select Previous Tab:** ⌘{
- **Activity:** ⌥⌘A

THE SCRIPTS MENU

Shortcuts found in the *Scripts* menu. As the script menu is segregated into subfolders by design, there are no top level commands with shortcuts at the factory settings. However, there are a few built-in scripts with default shortcuts:

Date

- **Verify & Optimize Databases:** ^⌥⌘Y

Download

- **Linked Images of Page:** ⌥⌘J
- **Open Linked Images in Tabs:** ⇧⌘J

METADATA

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

FILE METADATA

General Metadata:

- Title
- Headline
- Subject
- Creator
- Producer
- Editor
- Contributor

PDF Metadata:

- Author
- Title
- Subject
- URL
- Keywords

RTF Metadata:

- Author
- Title
- Comment
- Subject
- URL
- Keywords
- Organization
- Copyright

Email Metadata:

- Authors
- Author email addresses
- Recipients
- Recipient email addresses
- Email addresses

Media and Publication Metadata:

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

HTML Metadata:

- title
- description
- author
- comment
- subject
- organization
- keywords
- publisher
- email
- copyright
- generator
- dc.title
- dc.creator
- dc.subject
- dc.description
- dc.rights
- dc.contributor
- dc.keywords
- dc.publisher
- og:title
- og:description
- geo.position

CUSTOM METADATA

Another powerful feature of DEVONthink is custom metadata fields. Specified in the Settings > Data, you can define fields that are meaningful to you, your company, your research group, or even your family!

When you create a custom metadata field, you give it a name. DEVONthink uses this name to create an identifier for use in automated processes. This identifier is created automatically and cannot be changed.

Data Types: When you define a custom field, you choose a data type for it. So what's a "data type"? It's simply a type of value; like "a" is a character and "42" is a (the!) number. The following data types are supported, including any interface items associated with them, e.g., checkboxes or dropdown menus:

- **Boolean:** This is a true or false value. Displayed as a checkbox.
- **Countries:** A dropdown menu providing a list of country names. Supports an *Undefined* state
- **Languages:** A dropdown menu providing a list of languages. Supports an *Undefined* state

- **Integer:** A whole number, e.g., with no fractional part, like 17.
- **Decimal Number:** A fractional number, represented with a decimal point.
- **Date:** Can be specified as *Date & Time* or *Date*.
- **Identifier:** Any alphanumeric value, specified as needed, e.g., a customer or patient number.
- **Single-line Text:** A dropdown providing a list of terms you defined for the field in the Data preferences. You can also type in a new value.
- **Multi-line Text:** Enter a small paragraph of text. Line breaks can be typed by pressing Option-Return.
- **Rich Text:** Same as Multi-line text but supports basic formatting, e.g., bold or italic text.
- **Set:** Similar to the *Single-line text*, this shows a dropdown with values pre-defined for the field in the Data preferences. However, new values can't be entered outside the preferences. Supports an *Undefined* state.
- **URL:** Accepts any valid URL, including filesystem URLs.
- **Link:** A special dropdown that allows you to choose an item in your databases. a link for the chosen item is used.

Note there are metadata attributes that support an *Undefined* option: *Countries*, *Languages*, and *Sets*. This can be used anywhere custom metadata is displayed, e.g., in an *item list* column or the *Data* inspector. You can search for this by leaving the term empty, e.g., `mdcountry=` is equal to "The Country attribute is Undefined."

> Note: The *Countries* and *Languages* lists are lengthy, but not necessarily exhaustive. For *Multi-line Text* and *Rich Text*, only one line will be displayed in its column in the item list.

Predefined Custom Metadata: In Settings > Data, we have provided some custom metadata fields to get you started. These are ready to use and explore and serve as great examples of the data types discussed above:

- Date
- Company
- Author
- Abstract
- Status
- Serial Number
- ISSN/ISBN
- Digital Object Identifier (DOI)
- PubMed ID
- PMC ID
- Barcode
- Format
- Category
- Subcategory
- Genre
- Country
- Language
- Price
- Tax
- Tip
- Decimal

SEARCH OPERATORS

DEVONthink is well known for its powerful search functions. Not only does is support search prefixes, but also extended operators like booleans, parentheses, and wildcards. The syntax of the operators is compatible to DEVONagent and EasyFind, the Finder, Spotlight, common search engines as well as common programming languages such as C, C++, Objective-C, Java, and JavaScript. The complexity of the query is unlimited.

Case-Insensitivity: You are free to use capitalization as you wish, e.g., for proper names, but DEVONthink will ignore case when interpreting the query. However, the operators listed below are case-sensitive, so `age before beauty` is not the same as `age BEFORE beauty`.

White Space Handling: Words linked by non-white separators (e.g., `page-index` or `page_id`) are treated like phrases put into "quotes". Words separated by hyphens are handled like `word1word2` `OR "word1 word2"`. Characters separated by dots are considered to be abbreviations and therefore handled like words separated by hyphens, e.g., the term `t.a.t.u` is equal to `"t a t u"` `OR tatu`.

WILDCARDS

To make searching more flexible, you can replace parts of words with wildcards. For example, you can search for plural forms of words without having to type, e.g., "dog" and "dogs". The available wildcards are:

- **?:** Matches exactly one character.
- ***:** Matches none, one, or multiple characters.
- **[a-z]:** Matches one character of the range `a` through `z`.
- **[abc...] or [a|b|c|...]:** Matches one character out of the given list of characters.
- **[^...]:** Matches one character that is not contained in the given list or range.
- **~:** The contains operator for matching substrings, essentially equal to a string bounded by wildcards before and after, e.g., `*ink*`.

> Note: The wildcards presented here are not full regular expressions.

> **Example:** Searching a document containing this text: *DEVONtechnologies makes great software*:
> `text:~tech` matches as the *tech* is contained in one of the words.
> `text:tech` does not match as there is no word *tech*.
> `text:tech*` does not match as there is no word beginning with *tech*.
> `text:*tech` does not match as there is no word ending with *tech*.
> `text:*tech*` matches as *tech* is found in a word with text before and after it. However, unless you have a specific purpose, using the contains (~) operator is more succinct.

> Searching a document with the text: *He made a cake. She is making cookies. They live in Madeira*:
> `text: ma[dk]*` matches "made", "making", and "Madeira".
> `text: ma[dk]?` matches only "made".
> Given a document named *2024-2-14_Big Light Electric*:
> `name:[0-9]` would only match "2".
> `name:[0-9][0-9]` would only match "14"
> `name:[0-9]*` would match all the numbers, regardless of length.
> `name:[0-9][0-9]*` would match two or more numbers, e.g, "14" and "2024".
> `name:19[0-9][0-9]` If you were looking for documents only in the 1900s, this would match, e.g., "1914".
> `name:202[0-9] big` would match this document or others from the 2020s, e.g., "*2021*-3-9*_Big* Light Electric".

BOOLEAN OPERATORS

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

- **term1 AND term2:** Contains `term1` AND `term2`
- **term1 BUT term2:** Contains `term1` AND `term2`
- **term1 OR term2:** Contains `term1` OR `term2`
- **term1 XOR term2:** Contains `term1` or `term2`, but not both
- **term1 EOR term2:** Contains `term1` or `term2`, but not both
- **NOT term:** Does not contain `term`
- **"term1":** Contains the string of words `term1`, in exactly this form

Besides the classic Boolean operators, DEVONthink uses a number of operators that usually are found in high-end databases. Use these operators as a replacement for AND and "quotes" to fine tune your query.

- **term1 OPT term2:** `term1` is required, `term2` is optional. If `term2` is also found, the found document ranks higher in the search results.
- **term1 NEAR term2:** `term1` occurs 10 words or less before or after `term2`
- **term1 NEAR/n term2:** `term1` occurs n or less words before or after `term2`
- **term1 BEFORE term2:** `term1` occurs before `term2`
- **term1 BEFORE/n term2:** `term1` occurs n or less words before `term2`
- **term1 NEXT term2:** `term1` occurs right before `term2` (shortcut for `BEFORE/1`)
- **term1 NEXT/n term2:** `term1` occurs n or less words before `term2` (synonym for `BEFORE/n`)
- **term1 AFTER term2:** `term1` occurs after `term2`

- **term1 AFTER/n term2:** `term1` occurs n or less words after `term2`
- **~term1:** Contains `term1`, also as part of a word

For convenience, some of these operators can also be abbreviated using commonly used symbols:

- **AND:** `&`, `&&`, `+`
- **OR:** `|`, `||`
- **XOR:** `^`, `^^`
- **NOT:** `!`, `-`

Operators are evaluated in the following priority: parenthesis > phrase/hyphens > (`NOT`) `BEFORE`/`AFTER`/`NEAR`/`NEXT` > `NOT` > `AND`/`OR`/`XOR`/`EOR`. Terms with same priority but without parenthesis are evaluated from left to right.

EXAMPLES

By using any or all of the operators and rules laid out above you can create complex queries that find the exact information you're looking for. Here are some example queries that show how the operators are used.

> **Example:** `Devonian Dinosaurs`

This query looks for all documents that contain the words "devonian" and "dinosaurs".

> **Example:** `(Steve NEAR Jobs) AND iMac BUT NOT MacBook OPT Pro`

This query looks for documents that contain the words "Steve" and "Jobs" no farther ten words away from each other, as well as the word "iMac" (no specific position relative to Steve and Jobs), but not the word "MacBook". The word "Pro" does not need to occur, but if it does, the document is ranked higher in the list of search results.

> **Example:** `Paracetamol NEAR (~effect OR impact) AND ((side OR second*) NEAR/2 ~effect)`

This query looks for documents containing the word "Paracetamol" near (within 10 words) to words either starting with "effect" (and so also "effects") or "impact". In addition, the document needs to contain the word "side" or any word starting with "second" located within two words range of any word starting with "effect".

SEARCH PREFIXES

DEVONthink supports a wide variety of searchable attributes. These include common attributes, like names or tags, but also include document or DEVONthink-specific items, like word counts or custom metadata you've defined.

Similar to searching with Spotlight or some other applications, the use of search prefixes is not only supported, but encouraged. These take the form of a *prefix* and a *prefix operator*, e.g., `name:`, followed by the search term.

SEARCH PREFIXES

These prefixes are automatically applied when you choose criteria in the advanced search editor but they can also be manually entered in the search field. In the following list, we show the human-readable names you'd see in the criteria editor. In parentheses are the corresponding raw query values you'd type in a toolbar search or use in scripting.

- **Content:** Text contents in a file. (`text`)
- **Metadata:** The metadata for a file. (`metadata`)
- **Name:** The name of an item. For documents, this is distinct from the *filename* and does not include the file extension. (`name`)
- **URL:** The associated URL. (`url`)
- **Finder Comment:** Spotlight Comments. (`comment`)

- **Author:** The name of the sender of an email. (`author`)
- **From:** The email address of the sender of an email. (`docAuthorEmailAddresses`)
- **Recipient:** The name of a recipient of an email. (`docRecipients`)
- **To:** The email address of a recipient of an email. (`docRecipientEmailAddresses`)
- **Title:** The title of a file. The title may be distinct from its name, e.g., a song title for an MP3 file. (`docTitle`)
- **Comment:** The RTF-specific comments for a file. (`docComment`)
- **Headline:** A headline applied to some files. Rare. (`docHeadline`)
- **Subject:** The subject line from an email. (`docSubject`)
- **Description:** The description found on some files, typically images. (`docDescription`)
- **Keywords:** The PDF or RTF specific keywords for a file. (`docKeywords`)
- **Organization:** The company specified in imported links or vCards from the Contacts application. (`docOrganization`)
- **Copyright:** Copyright information in the metadata of a file. (`docCopyright`)
- **Album:** The album information from media metadata, e.g., MP3 files. (`docAlbum`)
- **Composer:** The composer information from media metadata, e.g., MP3 files. (`docComposer`)
- **Creator:** The process or application used to create a file. (`docCreator`)
- **Producer:** The producer of a file, usually applied to media files. (`docProducer`)

- **Aliases:** Aliases applied to an item. (`aliases`)
- **Tags:** Tags applied to an item. (`tags`)

- **Label:** The color label of an item, from 0 (no label) though 7 or by name, e.g., *Important*. (`label`)
- **Rating:** The star rating of an item, from 0 (unrated) through 5. (`rating`)
- **Width:** The width of a document in points, i.e., the width multiplied by 72. (`width`)
- **height:** The height of a document in points, i.e., the height multiplied by 72. (`height`)
- **length:** The number of pages in a file or length of a media file in seconds. (`length`)

- **size:** The size of an item in bytes, KB, MB, or GB, e.g., `size >= 50 MB`. (`size`)
- **wordcount:** The number of words in the contents of a file. (`wordcount`)
- **charactercount:** The number of characters in the contents of a file. (`charactercount`)
- **hits:** The number of times a file has been viewed or opened. (`hits`)
- **filename:** The name of the file in the file system, including the file extension. (`filename`)
- **extension:** The extension of a file, e.g., *txt*. This also supports an *Any Extension* option to filter filenames having or lacking an extension. (`extension`)
- **kind:** Supports `any`, `group`, `smartgroup`, `tag`, `ordinarytag`, `grouptag`, `text`, `rtf`, `formattednote`, `markdown`, `html`, `webarchive`, `xmlfile`, `propertylist`, `image`, `pdf` for all PDF documents, `pdf +text` matching PDF documents with a text layer, `quicktime`, `video`, `audio`, `bookmark`, `feed`, `news`, `script`, `sheet`, `email`, and `other`. (`kind`)

Item prefixes: These special prefixes are for state-based queries, like if items are replicants or contains aliases. They all follow the form of `item:<specified state>`, e.g., `item:locked`.

You can specify the state of items, i.e., *is* or *is not*. The available options are as follows:

- **Replicated:** Matches items that are replicants. (`replicated`)
- **Duplicated:** Matches items that are duplicates. (`duplicated`)
- **Indexed:** Matches items that are indexed, not imported. (`indexed`)
- **Pending:** Matches items whose contents aren't downloaded and available. (`pending`)
- **Tagged:** Matches items with tags applied. (`tagged`)

The other option is specifying whether items do or don't contain a certain property. For example, you can search for items containing aliases and the `item:<specified state>` syntax is also used. This includes the negated form. Here are the searchable properties:

- **Aliases:** Matches items with aliases. (`aliased`)
- **Annotation:** Matches items with an associated annotation file. (`annotated`)
- **Comment:** Matches items with a Finder comment. (`commented`)
- **Data:** Matches items with child items, e.g., a group with items contains data. An empty group can be found via `item!:data`, meaning the item does not contain data. (`data`)
- **Metadata:** Matches items with metadata. (`metadata`)
- **Reminder:** Matches items with a due date set. (`reminded`)
- **Script:** Matches items with a script applied in the *Info* inspector. (`scripted`)
- **Thumbnail:** Matches items with a thumbnail applied. (`thumbnail`)
- **URL:** Matches items with a URL set in the *Info* inspector. (`url`)

Marked: Item states shown in the *Flag* column in the item list, e.g., locked, can be searched for. When choosing criteria in the *Advanced* options of the toolbar search, choose the *Marked* criterion. If using a raw query string, the search prefix is

`item:<specified state>` and it's negated form, `item!:<specified state>`. Here are the marking options available:

- **Flag:** The flag state of an item. Supports `flagged` or `unflagged`.
- **Unread:** The unread state of an item. Supports `read` or `unread`.
- **Locking:** The locking state of an item. Supports `locked` or `unlocked`.

Dates: Dates are a very commonly used property in searches, for example, if you're looking for a document you created two days ago. Here are the date-based properties you can search for. See the Date Operators in the next section for the syntax you can use with these.

- **added:** The date the item was added to the database. (`added` or `additionDate`)
- **Date Created:** The date the item was created. (`created` or `creationDate`)
- **modified:** The date the item was last modified. (`modified` or `modificationDate`)
- **opened:** The date the item was last opened. (`opened` or `openingDate`)
- **due:** The due date set in a Reminder for an item. (`due` or `dueDate`)

Miscellaneous Properties: There are also more esoteric attributes you can search for, like the number of attachments in emails, or the detected language of a document.

- **Original Name:** The original name of a renamed document, before it was renamed. (`md_originalname`)
- **Attachments:** The number of attachments in an email or the number of resources added to an RTFD file. (`md_attachments`)
- **Annotations:** The number of annotations set in a PDF file. (`md_annotationcount`)
- **Encryption:** The encrypted state of a PDF. This is a Boolean value denoted numerically, e.g., `md_encrypted==1` when a file is encrypted. (`md_encrypted`)
- **Incoming Item Links:** The number of item links to a document from other documents in DEVONthink. (`md_incomingItemLinkCount`)
- **Outgoing Item Links:** The number of item links to other documents present in a document. (`md_outgoingItemLinkCounts`)
- **Language:** An abbreviation of the detected language in the contents of a file. For a list of values, select a language in the criteria and note the abbreviation to use. (`md_language`)
- **Country:** An abbreviation of the country in the geolocation data for a file. For a list of values, select a country in the criteria and note the abbreviation to use. (`md_country`)
- **Postal Code:** The postal code detected in the geolocation data for a file. (`md_zipcode`)
- **Administrative Area:** The state, province, or region detected in the geolocation data for a file. (`md_area`)
- **Locality:** The city detected in the geolocation data for a file. (`md_locality`)

Custom Metadata: Any custom metadata attributes defined in the *Data* settings are also available as search prefixes. The search prefix you will type is a concatenated form of the attribute's name, prefixed with `md`. For example, an attribute of `Total Cost` would have a search prefix of `mdtotalcost`.

There are also two special prefixes you can use:

- **scope:** This limits where you are searching. It supports `selection` (the current group or database), referring to a database by name (in quotes), and `inboxes`. If no scope is specified, the search applies to all open databases. When used, `scope:` should be the last parameter in the query.
- **any:** When used, this allows you to specify whether to return results matching any of the criteria. This can only be used when specifying more than one search prefix, e.g., tags and filename.

> **Example:** `added>=2019-03-10 scope:selection tags:sync; methods scope:"Tech Stuff" any: name:test OR imprint {any: tags:blue; red}`

Sub-criteria searches: Yes, you may have noticed in the last example a tags search in curly braces. This creates sub-criteria for the search. This obviously extends the search options to allow creating even more complex forms.

PREFIX OPERATORS

Many times prefixes end with a colon, e.g., `tags:` but some use other forms, depending on the available options in the criterion. For example, words can "begin with" some characters, but a size is greater or less than a value. If you select a criterion you would see what options apply. Use the keys below to map the option to its operator.

Matches, Is, Is Not:

`:` is equal to the term *matches*. With strings-based queries, it allows for wildcards to be used. It is also used for state-based queries, like *Kind*. The negated form, `:!` is also supported.

`==` is equal to the term *is*. This must be an exact match of the search term. These can be used in strings and number-based queries. The negated form, `!=` is also supported.

> **Example:** Kind is Group → `kind:group`
> Item is indexed → `item:indexed`
> Item is not Replicated → `item:! replicated`
> Extension is XML Document → `extension==XML`
> Language is not English → `language!=en`

String Matching: These are operators that are used with string-based queries, like names or text content. These queries also support:

`:<` is equal to *begins with*.

`:>` is equal to *ends with*.

`:~` is equal to *contains*. (The tilde is the second key down on the top left of an English keyboard.)

> **Example:** Subject begins with party → `docSubject:<party`
> Locality ends with field → `md_locality:>field`
> Name contains tech → `name:~tech`

Number Matching: In addition to the `==` and `!=` operators, numbers can also use these operators:

`<` is equal to *is less than* and `<=` is *is less than or equal to*.

> is equal to *is greater than* and >= is *is greater than or equal to*.

> **Example:** Word Count is less than 1000 → `wordcount<1000`
> Size is greater than 10MB → `size>10 MB`
> Hits is greater than or equal to 1 → `hits>=1`

Range Matches: For certain numerical attributes, you can use a range matching syntax, `attribute:lowerLimit-upperLimit`. For example, `wordcount:500-1000` matches files with between 500 and 1000 words. This is identical to the longer form syntax of `wordcount>=500 wordcount<=1000`. Range matches can be used with: *width*, *height*, *duration*, *length*, *hits*, *wordcount*, *charactercount*, and *size* prefixes.

Date Operators: These are operators used with date-based queries, like the creation date of files.

< is equal to *before* and <= is *before or on*.

> is equal to *later* and >= is *later or on*.

`:#` is equal to *within last* and `:!#` is *not within last*. These searches default to days, but you can also use *weeks*, *months*, or *years*, e.g., `modified:!#1weeks`. Note you always use the plural form of the time component.

For dates-based queries, `:` is equal to *is* and `:!` equals *is not*.

For greater compatibility, some other combinations of operators are allowed. `due:<=2020-01-03` is equivalent to `due<=2020-01-03`.

Named Relative Dates: You can use these terms for relative dates: *Today*, *Yesterday*, *This Week*, *Last Week*, *This Month*, *Last Month*, *This Quarter*, *Last Quarter*, *This Year*, and *Last Year*. Use these with *is*, *before (or on)*, and *after (or on)* operators.

> **Example:** Date Created is after January 31, 2019 → `created:>=2019-01-31`
> Date opened is not within last 5 days → `openingDate:!#5days`
> Date Due is not Today → `due:!Today`

Date searching allows for some flexibility in formats. Time is not a required parameter, but can be specified. These searches are all equivalent:

> **Example:** `added>10 march, 2019`
> `added>March 10, 19`
> `added>2019-03-10 08:30:00 -0500`

PLACEHOLDERS

One of the most powerful features of DEVONthink is the ability to insert data dynamically. A placeholder is a bit of code DEVONthink interprets when used in these scenarios, replacing it with a specific value. You may have an imprint with a *Name* placeholder defined in the title. When the imprint is used on a PDF, the placeholder is converted to the name of the file!

To extend the possibilities even further, you can combine static text and multiple placeholders to achieve truly custom results. You can use these in a variety of ways: smart rules and batch processing, Reminder alarms, custom imprints on images and PDFs, in WikiLink templates, and more.

Below is a list of placeholders currently available. Following each description is the raw placeholder that can be used when creating templates in external applications or using the `import template` AppleScript command:

> Note: Please be aware not all placeholders can be used in all situations. For example, you can't use the *Location* placeholder in a document template as the document doesn't have a location until after it's created. Testing is strongly encouraged.

Generic Info:

- **Name:** The name or title of the document. (`%recordName%`)
- **Proposed Name:** A suggested name derived from a document's title or from the first line of the document if no title is present. (`%recordProposedName%`)
- **Name Without Date:** Returns the filename after parsing out any detected dates. (`%recordNameWithoutDate%`)
- **Aliases:** Any aliases applied to the document. (`%recordAliases%`)
- **Finder Comment:** Any Finder comments applied to the document. (`%recordComment%`)
- **File Name:** The filename in the file system. (`%recordFilename%`)
- **File Extension:** The extension of the document's filename. (`%recordPathExtension%`)
- **Kind:** The kind of the file, e.g., *group* or *rich text document*. (`%recordKind%`)
- **URL:** The URL in the Info pane. (`%recordURL%`)
- **Item Link:** The unique URL of the document. (`%recordLink%`)
- **Location:** The location in the database; e.g., */Inbox/Research*. (`%recordLocation%`)
- **Tags:** Tags applied to the document. (`%recordTags%`)
- **#Tags:** Tags applied to the document but returned as hashtags. (`%recordHashTags%`)

Counters:

- **Index:** An incrementing number relative to the number of items being processed, e.g., by a smart rule or imprint. (`%recordIndex%`)
- **Counter:** Similar to the *Index*, this number is zero-padded. (`%recordCounter%`)
- **Bates Number:** Inserts a Bates number. (`%recordBatesNumber%`)
- **Page Count:** The total number of pages in the document. (`%recordPageCount%`)

Item Locations:

- **Group Name:** The name of the group containing the document, e.g., `/001/a/b/myfile.txt` would report *b* as the group name. (`%groupName%`)
- **Top Group Name:** The name of the top level group in the root of the database, e.g., `/001/a/b/myfile.txt` would report *001* as the top group name. (`%topGroupName%`)
- **Database Name:** The name of the database containing the document. (`%databaseName%`)
- **Database Path:** The filesystem path of the database. (`%databasePath%`)

Document Attributes:

- **Original Name:** The persistent original name of a renamed document. Typically

used in revision-proof databases. (`%record_originalname%`)
- **Attachments:** The number of attachments in a document, e.g., a rich text document or email. (`%record_attachments%`)
- **PDF Annotations:** The number of annotations in the active document. (`%record_annotationcount%`)
- **Incoming Item Links:** The number of documents containing item links to the active document. (`%record_incomingItemLinkCount%`)
- **Outgoing Item Links:** The number of documents linked to in the active document. (`%record_outgoingItemLinkCount%`)

Geographic Info:

- **Language:** An abbreviation of language detected in the document's indexed contents. (`%record_language%`)
- **Country:** The country in the geolocation data for a document. (`%record_country%`)
- **Postal Code:** The postal code derived from the geolocation data for a document. (`%record_zipcode%`)
- **Administrative Area:** This is state, province, or region in the geolocation data for a document. (`%record_area%`)
- **Locality:** The city in the geolocation data for a document. (`%record_locality%`)

Formatting:

- **Tab:** A tab character. (`%tab%`)
- **Line Break:** A line break (return) character for multi-line text. (`%newline%`)

Detected Values: The following placeholders get their values from the name or content of a matched document. For example, the *Document String* is the result of a `Scan Name` or `Scan Text` smart action.

- **Document Amount:** This is an monetary amount detected in the name or content of documents, typically receipts or invoices. (`%documentAmount%`)
- **Document String:** This is a string detected in the name or content of documents. (`%documentString%`)
- **Digital Object Identifier:** The unique digital object identifier of the active document, if available. (`%digitalObjectIdentifier%`)
- **International Standard Book Number (ISBN):** The detected ISBN number of a document. (`%internationalStandardBookNumber%`)

Date Placeholders: There are several types of date-specific placeholders to choose from. You can choose from several built-in formats, e.g., the short date, or create your own with individual date component placeholders. Due to the repetition of date placeholders, the raw value of every individual placeholder isn't listed here. However, below are the date component raw values. Note some formats will appear relative to your geographic location, e.g., `Jan 1, 2001` for the medium date would be common in the US.

Calendar Components:

- **01/01/2001:** The short date format. (`%shortDate%`)
- **Jan 1, 2001:** The medium date format. (`%date%`).

- **2001/01/01:** The ISO date format. (`%sortableDate%`)
- **Saturday, Jan 1, 2001:** The long date format. (`%longDate%`)
- **01:** The zero-padded number of the date. (`%day%`)
- **Saturday:** The name of the day. (`%weekday%`)
- **01:** The zero-padded number of the month. (`%month%`)
- **January:** The name of the month. (`%monthname%`)
- **2001:** The full year. (`%year%`)
- **01:** The short year. (`%shortYear%`)

Time Components:

- **Time:** The current time shown in 12 or 24 hour format, depending on your system settings, e.g., *11:59:59 AM*. (`%time%`)
- **Hour:** The hour of the time. (`%hour%`)
- **Minute:** The minutes of the time. (`%minute%`)
- **Second:** The seconds of the time. (`%second%`)

Listed below are the supported date types with their raw prefix provided. The placeholders in the previous list relate to the current date, so entering (`%month%`) would give you the current month. To use other kinds of dates, e.g., *Newest Document Date*, use the raw value, then add the date component from the list above with the first letter capitalized. For example, getting the month of the newest document date would be: `%newestDocumentDate%` and `month` yielding `newestDocumentDateMonth`.

- **Current Date:** Today's date. There is no prefix to the raw placeholders for current date.
- **Addition Date:** The date the item added to the database. `recordAddition…`
- **Creation Date:** The date the item was created. `recordCreation…`
- **Modification Date:** The date the items was last modified. `recordModification…`
- **Date:** This is a date detected in the document's contents, e.g., in a receipt. For PDFs only the first four pages are used. `documentDate…`
- **Newest/Oldest Document Date:** The newest or oldest date detected in the document. For PDFs, only the first four pages are used. `newestDocumentDate…` and `oldestDocumentDate…`

On a side note, you can string together multiple date and time component placeholders, e.g., to create a Zettelkasten timestamp string like `20010101115959`.

Clipboard:

- **Clipboard:** Inserts plain text content from the clipboard. (`%clipboard%`)
- **Clipboard Styled:** Inserts rich text content from the clipboard. (`%styledClipboard%`)
- **Clipboard Link:** Inserts a link from rich text content on the clipboard. (`%clipboardLink%`)

Computer Properties:

- **Predefined Author:** The *Author* specified in DEVONthink's settings. (`%author%`)
- **Username:** The shortname of the current macOS account. (`%username%`)

- **Full Username:** The longname of the current macOS account. (`%fullUsername%`)
- **Organization:** The company name, if defined by the (Me) contact card in macOS Contacts. (`%organization%`)
- **Email Address:** The primary email address, as defined by the (Me) contact card in macOS Contacts. (`%emailAddress%`)
- **Host:** The hostname of the machine. (`%host%`)

Properties: Some files have specific properties, e.g., the author of an email. These are displayed in the *Info > Properties* inspector. Here are the supported properties and their placeholders, including the raw value.

- **Author:** The name of the sender of an email. (`%kMDItemAuthors%`)
- **From:** The email address of the sender of an email. (`%kMDItemAuthorEmailAddresses%`)
- **Recipient:** The name of a recipient of an email. (`%kMDItemRecipients%`)
- **To:** The email address of a recipient of an email. (`%kMDItemRecipientEmailAddresses%`)
- **Title:** The title of a file. The title may be distinct from its name, e.g., a song title for an MP3 file. (`%kMDItemTitle%`)
- **Comment:** The RTF-specific comments for a file. (`%kMDItemComment%`)
- **Headline:** A headline applied to some files. Rare. (`%kMDItemHeadline%`)
- **Subject:** The subject line from an email. (`%kMDItemSubject%`)
- **Description:** The description found on some files, typically images. (`%kMDItemDescription%`)
- **Keywords:** Keywords typically applied to PDF, rich text, or images. (`%kMDItemKeywords%`)
- **Organization:** The company specified in imported links or vCards from the Contacts application. (`%kMDItemOrganizations%`)
- **Copyright:** Copyright information in the metadata of a file. (`%kMDItemCopyright%`)
- **Album:** The album information from media metadata, e.g., MP3 files. (`%kMDItemAlbum%`)
- **Composer:** The composer information from media metadata, e.g., MP3 files. (`%kMDItemComposer%`)
- **Creator:** The process or application used to create a file. (`%kMDItemCreator%`)
- **Producer:** The producer of a file, usually applied to media files. (`%kMDItemProducer%`)
- **E-mail:** Email addresses detected in a document. (`%kMDItemEmailAddresses%`)
- **Contributor:** People or organizations who contributed to the document. (`%kMDItemContributors%`)
- **Publisher:** The organization who published the document. (`%kMDItemPublishers%`)
- **Editor:** People or organizations involved in editing a document. (`%kMDItemEditors%`)

Custom Metadata: This menu lists any custom metadata attributes you've defined in the *Data* settings. In order to use raw placeholders, add the `md` prefix to the identifier of the custom attribute shown in the settings. For example, `mddoi` for the Digital Object Identifier attribute.

SMART ACTION PLACEHOLDERS

These placeholders are used for automation in smart rules and batch processing.

- **User Input:** The response returned from a *User Input* smart action.
- **Script Output:** The output from the `Script with Input/Output` smart action. This placeholder is always a string, even if e.g., the script returned an integer.

Chat Suggestions: These placeholders are specific to smart actions so are only available in smart rules and batch processing. The values for the placeholders come from your *AI* provider. The AI engine will examine a document and return the value for the placeholder, e.g., the amount on a receipt.

Many of these are described above: *Title*, *Filename*, *Tags*, *Rating*, *Authors*, *Company*, *Address*, *Geolocation*, and *Date*. However, there are some specific placeholders for AI:

- **Amount:** This may be a monetary value similar to the price but could also be quantities, e.g., from a shipping manifest.
- **Price:** The monetary value on a document.
- **Query Response:** Uses the reponse returned from a Chat - Query smart action.
- **Suggested Date:** Uses an AI-derived date from the contents of the document.
- **Summary:** Returns a summary of the current document.

TEMPLATES

Below are listed the pre-installed templates that come with DEVONthink. You are free to inspect or modify these templates to suit your needs, but we do recommend making a duplicate to preserve the original.

More templates are available by selecting *Data > New from Template > More Templates*, the *Help > Support Assistant*, or via the *Extras* sidebar.

> Note: Some of the included templates are just simple files. Others are smart templates, packages that contain assets and scripts that provide powerful template generation. See the Automation chapter for more information on them.

Accounts & Passwords:

- **Email Accounts:** Adds a sheet to record technical details of an email account details.
- **Online Account:** Adds a sheet for storing website account details.
- **Serial Number:** Adds a sheet for storing product serial numbers.

AI TEMPLATES

The templates in this category all utilize AI models to return results, create documents or images, etc. The availability and quality of output is governed by the choices and services set in DEVONthink's *AI* settings.

- **Document Assistant — Markdown/Text:** Generate a Markdown or rich text document based on a prompt regarding selected documents.
- **Meeting Notes – Markdown/Text:**
- **Mixture-of-Agents – Images:** Creates images with multiple generative image engines you have API access to. Bear in mind, this may incur extra costs, depending on the provider you're using.
- **Mixture-of-Agents – Markdown/Text:** Sends a prompt to multiple AI engines for which you have access, e.g., ChatGPT and Gemini. The resulting document will be Markdown or rich text, with the individual LLMs response and a summary of all the responses.
- **Research Report - HTML/PDF:** Utilizes deep research and thinking on the topic you enter and creates a nicely formatted document with an overview of it. Currently only supports ChatGPT, Claude, Mistral, or Gemini and the appropriate model is automatically selected.
- **Short Story — Illustration:** Generates an image using the contents of a selected file, bookmark, PDF document, or video as the prompt.
- **Short Story — Markdown/Text:** Creates a story outline in Markdown or rich text based on a selected document. It includes some basic character development, themes, and other details.
- **The Devonian Times:** Creates a "newspaper" page summarizing some of the top new stories in the world. This serves as a good example of web searching and AI-controlled formatting.

Classifications:

- **Decimal Filing System:** Adds ten groups for the decimal filing system used by many European companies for filing (scanned) paper documents.
- **Dewey Decimal Classification:** Inserts a group with sub-groups that builds the first levels of the Dewey Decimal Classification. Use this feature for databases that contain knowledge spanning many subjects.
- **Library of Congress Classification:** Inserts a group with sub-groups that builds the first levels of the Library of Congress Classification. Use this feature for databases that contain knowledge spanning many subjects.

Education:

- **Cornell Notes – Markdown/Text:** Adds a topic-centric document for writing Cornell notes. Available as Markdown or rich text documents.
- **Cornell Notes (Education) – Markdown/Text:** Adds a course-specific document for writing Cornell notes. Available as Markdown or rich text documents.
- **Lab Notes – Markdown/Text:** Adds a lab report document including standard scientific method sections. Available as Markdown or rich text documents.
- **References:** Adds an empty sheet for recording citation information such a DOI, authors, journal, publication year, etc.
- **Reference (from Bookends):** Adds selected references in Bookends as rich text.
- **Reference (from Endnote):** Adds selected references in Endnote as rich text. Note: Endnote should be in the same Space as DEVONthink.

- **Quotes:** Adds a sheet for recording quotes along with the author, source, comments, etc.
- **Quote (from clipboard):** Adds a rich text document for a quotation or citation. The clipboard content is automatically inserted and, if it's an Internet address (URL), it is automatically made clickable.
- **Articles:** Adds a sheet for keeping track of articles.
- **Booklets:** Adds a sheet for keeping track of booklets.
- **Books:** Adds a sheet for keeping track of books.
- **Manuals:** Adds a sheet for keeping track of manuals.
- **Proceedings:** Adds a sheet for keeping track of proceedings.
- **Technical Reports:** Adds a sheet for keeping track of technical reports.
- **Theses:** Adds a sheet for keeping track of theses.
- **PubMed – Markdown/Text:** Runs a query in PubMed and imports up to 100 abstracts formatted as rich text or Markdown documents.

Productivity:

- **Daily Journal – Markdown/Text:** Adds Journal group with month and day subgroups, containing a file with a daily quote, some news headlines, and space to write your thoughts. Available in Markdown or rich text. This template is a good example of smart templates.
- **Note:** Adds a new note. If the clipboard contains text, it is automatically inserted.
- **Phone Note:** Adds a new phone note, automatically inserting the current date and time.
- **Project:** Adds a simple project group structure including an "About this project" document. The smart template asks for a project name; retrieves your name, department, email address, and phone number from your contact card; and adds this information to the "About this project" document.
- **Task List:** Adds a simple task list.
- **Weekly Review:** Adds a formatted note displaying checklist items and space to review the week.

Registers:

- **1—31:** Adds 31 groups, numbered 1 through 31.
- **A—Z:** Adds 26 groups, named A through Z.
- **Days of the Week:** Adds groups for the days of the week.
- **Months:** Adds groups for the twelve Christian months.

Smart Groups: These templates create smart groups, not individual documents. Note these are local smart groups so they only search in the database in which they're located.

- **Email:** Displays any email.
- **Email with Attachments:** Displays emails with attachments.
- **Images – Large/Small:** Displays images based on their pixel dimensions. *Large* images are `1280 x 960` or larger, *Small* images are smaller on these dimensions.

- **Images/Music/Videos:** Displays any media file.
- **Due or Flagged:** Display flagged items or items with a due date this week.
- **Last Month/Week/Year:** Displays documents modified within a given period.
- **Documents with Annotations:** Adds a smart group displaying files with annotations, e.g., highlights.
- **Large Documents:** Add a smart group displaying documents larger than 5 MB.
- **PDF (not searchable):** Add a smart group displaying all PDF documents that don't contain machine-readable text.
- **Star Ratings (1-5):** Add a smart group displaying items with a rating of one or five stars.

Toolbar: By default this contains no templates. Add your own templates to `~/Library/Application Support/DEVONthink/Templates.noindex/Toolbar`. These can be added to the DEVONthink windows using *View > Customize Toolbar*.

Read more about using and creating templates in the Documents chapter...

MARKDOWN EXPLORED

Markdown is a fairly simple "language" to learn. For many people, just typing and using a handful of control characters will be sufficient. However, it has become a very feature-rich format supporting things like outlines, images, tables, linking, etc., perhaps even some things surprising to you.

Over time multiple "flavors" of Markdown have been introduced. *DEVONthink Markdown* utilizes standard Markdown but also supports features from some other flavors: MultiMarkdown, CommonMark, CriticMarkup, and GitHub Flavored Markdown (GFM). Here you can read about many possible features, but also realize it's not exhaustive. There many be extra features for an element, but we'll leave the deeper investigation to you!

Basic formatting: Get started by simply typing, creating `paragraphs`. These will usually be your most common element. But as you write, you may want to add some emphasis to certain content. To add formatting, surround the content with control characters showing the Markdown parser the words should be rendered with specific formatting. Here are the three most common styles you'll use:

- **Italic:** `*italic*`.
- **Bold:** `**bold**`.
- **Bold-Italic:** `***bold-italic***`.

With these basics, you can quickly capture ideas or write longer-form content in plain text, but with some extra flair. However, the possibilities only increase from here.

Extended Formatting and Elements: Often used in academic or professional writing, some specialized formatting is also supported. The first two are standard Markdown; the remainder are CriticMarkup.

- **Subscript:** `~subscript~`.
- **Superscript:** `^superscript^`.
- **Highlight:** `{==highlight==}`.
- **Underscore:** `{++underscore++}`.

- **Strikethrough:** `{--strikethrough--}`.
- **Addition:** `{++text to add++}`
- **Deletion:** `{--text to delete--}`
- **Substitution:** `{~~replace this~> with this~~}`
- **Comment:** `{>>comment<<}`

Lists: Whether for an outline, shopping list, taxonomies, or record your top ten movies, creating lists is easily done. These are the supported types:

- **Ordered (Numbered) List:** `1. Manufacturers`
- **Unordered (Bulleted) List:** `* Monday` or `- Plan`.
- **To Do List:** `- [ ] Call insurance company`. Remember to leave a space between the square brackets. To mark an item as complete, put an `x` between them.

As you type each line item, pressing the ↩ Return key will add a new line item ready to enter the next one. Press the key twice to close the list. Lists can be indented to create nested lists by pressing the ⇥ Tab key or adding one space per-level at the beginning of a line. To outdent a list, remove spaces from the line's beginning.

Tables: Creating tables is supported, even building them in a semi-visual manner. The cells of the table are separated by the pipe `|` character. (A pipe at the beginning and end is optional.) The top of a table is defined the header line: the number of columns denoted by pipes, usually with column header names, e.g., `Name|Location||Age`. The next line is the column alignment line: three hyphens, again separated by a pipe, like `:---|:---|---|:---:`. The colons `:` control if the cell content is left, right, or center justified. Then you enter each row's cell's content, e.g., `Jason|Marana|AZ|48`, on separate lines. You can also include an optional table caption in square brackets immediately before or after the table, like `[Friends and Family]`.

> **Example:**
>
> ```
> Movie | Year | First Week Box Office
> :--|:--:|:--:
> Star Wars: A New Hope | 1977 | $1,554,475
> The Empire Strikes Back | 1980 | $6,400,000
> Return of the Jedi | 1983 | $45,311,004
> ```

Sections: As your content becomes more complex, you may want to split the content into sections. Create a section by typing `#` followed by a space and the title of the section, e.g., `# Milky Way`. This creates an "h1" heading. Sections up to six levels deep are made by using the requisite number of hashtag symbols. So your first subsection would be `## Planets`, creating an "h2" heading. You can use these headers to navigate the document in the *Table of Contents* inspector. Additionally, you can include a table of contents in the document by entering `{{TOC}}` where you want it to appear. You'll also find more information in the *Cross-Reference Linking* section below.

Everyday Extras: Here are a few more common elements you may find useful in your writing:

- **Horizontal Rules:** Add a separator line by typing three dashes or asterisks on a line: `***`.
- **Blockquote:** Enter attributed quotes by preceding each line in the quote with a greater than symbol: `>I think`,

`therefore I am.`. You can also nest blockquotes with multiple > symbols.

- **Code block:** Insert inline code in a sentence: `` `code terms` ``. Note: Those are backticks, found on the tilde (~) key.
- **Fenced code block:** Create separate blocks of code: ``` - triple backticks on a line above and below the code. For syntax coloring of code, see the *Prism.js* extension described in the Markdown Extensions section below.
- **Emoji:** For a little extra personality, you can type Slack-style emoji, like `:grinning:`, directly in a Markdown document.

ADVANCED MARKDOWN

DEVONthink Markdown also supports some "advanced" features found in some other Markdown flavors. From academia to design to business uses and more, these give you some specialized tools to work with.

Footnotes: Footnotes are supported in our parser and automatically insert a numbered footnote link in the text. These are two of the supported footnote styles:

- **Reference:** Uses a label, `[^label]`, pointing to a particular footnote matching the same label, `[^label]: Footnote text`, typically added at the bottom of the document.
- **Inline:** The footnote text is used as the label, automatically creating a numbered footnote, e.g., `[^The tax authority responded on the 15th.]`, and adding the footnote link in the text.

Callouts: A feature found in GitHub Flavored Markdown, a callout or admonition is a specially styled blockquote element to call attention to some text, e.g., a tip or warning. The syntax is `>[!Type]Optional Title` followed by the message, preceded by the greater than symbol. The supported types are: `INFO`, `NOTE`, `TIP`, `IMPORTANT`, `CAUTION`, `WARNING`, `DANGER`, `QUESTION`, `EXAMPLE`, `QUOTE`, `SUCCESS`, `FAILURE`, and `BUG`. The callout's text can contain rich content, like formatting, links, lists, etc.

Callouts can be collapsible and have an initial state when the document is viewed., opened or closed. After the closing square bracket, include a plus + for open or a minus – for closed, e.g., `>[!INFO]-What is subzero?`.

The MkDocs and Python-Markdown callout syntax is also supported.

Abbreviations: Abbreviations are content appearing in tooltips when you hover over words with definitions. To define the abbreviation text, use the syntax: `*[Word]: tooltip text`. Create the abbreviation `*[NASA]: National Aeronautics and Space Administration` and the full title will appear when you hover over `NASA` in the preview.

> Note: Abbreviations, footnotes, bibliographic entries, etc. can be defined anywhere in the document but they're most commonly put at the bottom of the document.

Metadata: *DEVONthink Markdown* supports MultiMarkdown-style metadata headers as well as YAML/frontmatter. With it you can add non-displaying information about the document, like authors, dates, and even linked stylesheets as metadata.

To use the feature, format the first line of the document with a colon, e.g., `Author: DEVONtechnologies`. Add as many metadata fields as you wish but they must be in a block at the top of the document. Pre-defined fields in the *Info > Properties* inspector can be populated with this metadata, e.g., `keywords: support,markdown`. If you're not using metadata and want the first line of your document to contain a colon, add a single blank line at the top of the document and the subsequent lines will be treated as normal paragraphs.

Metadata can also be used as variables in the content of the document by entering the attribute's name prefixed with a percent sign, inside square brackets. So if you enter `product: widget-002` in the metadata, you would type `[%product]` in the text and it will render as `widget-002` in the preview.

MARKDOWN EXTENSIONS

DEVONthink supports some Markdown extensions to provide a few specialized features in the output. These can be toggled in the *Files > Markdown > Extensions* settings.

MathJax: Markdown is often used in academic situations, many using mathematical equations in their writing. DEVONthink supports the Mathjax extension that will beautifully render coded equations.

- **Inline Math:** Surround the equation with single dollar signs, e.g., `$E = mc^2$`. The alternate `\(...\)` syntax can be used.
- **Display Math:** Begin and end the equation with lines containing double dollar signs. The alternate, `\[` and `\]` syntax can be used.
- **MathML:** Raw MathML elements can be added to the document, both inline and display: `What if <math xmlns="http://www.w3.org/1998/Math/MathML"><mi>A</mi><mo>≠</mo><mi>B</mi></math> ?`

> Note: If you need to include a rendered dollar sign, escape it: `\$`.

Mermaid: Diagrams can be created in Markdown documents using the Mermaid extension. Add a line of three backticks as shown ```` ```mermaid ````. Add the diagram code as needed and close the diagram with another line of three backticks. There are several diagram types available and the syntax is discussed on their website.

Prism: For those writing code in their Markdown, DEVONthink supports Lea Verou's Prism extension. Just add a line of three backticks ```` ```language- ```` and the language you're using, for example, ```` ```language-applescript ````. Remember to add a line of three backticks under the code to close it. This displays syntax highlighting of code blocks in the rendered output.

> Note: Not all languages supported by Prism are available. Additional languages may be added in the future if there's sufficient interest in them.

LINKING

Document linking is an important feature for a wide range of purposes, e.g., linking Zettelkasten documents, building a custom bookmarks page, or adding some images

to brighten up a page. Markdown has rich support for linking a variety of link types. **External Links** Links to external items, e.g., web pages and documents, are very commonly used in Markdown. The basic forms are:

- **Web:** Link to a web page: `[link text](URL)` creates a hyperlink from the link text. Use `<URL>` to display the full URL
- **Document:** Link to another document via hyperlinked text: `[document title](link)`.
- **Image:** Link to an image: `![alt text](URL)`. Note you can set a default link type for images in the *Files > Markdown > Image Reference* popup.
- **URL Schemes:** Add application-specific URLs, even DEVONthink's *item links*. As an example, you could add a `[Jenny](facetime://867-555-5309)` URL that launches a FaceTime call.

> Note: Be aware, the URL must be URL-encoded, e.g., spaces are represented with `%20`.

Document links will either show a filename, with or without a path, or an item link. Depending on where the linked document is located or how it was created, e.g., pasting an item link.

- **Sibling Link:** Links to an item in the same group as the Markdown document: `![link](item.png)`.
- **Relative Downward Link:** Links to an item in a sub-group of the group containing the Markdown document: `![link](group/item.png)`. Upward links are not possible as a document may have multiple parents.
- **Absolute Link:** Links to an item outside the Markdown document's parent group: `![link](/group/item)`. For example, if you have common resources in a specific group, you can link to them using this format, e.g., `![Logo](/Inbox/Company Resources/logo.png)`.
- **Item Link:** Links to a specific item by its UUID, not requiring a location: `[link text](x-devonthink-item://...)`

While it's good for you to know and understand the link syntax, DEVONthink has ways to make linking easy and more efficient. See the Documents > Markdown documents section for information on linking.

Cross-Reference Linking: If you are using sections in your Markdown, you can create links to jump to those sections. Assume we have a document with sections:

- **Link via name:** `[Notes][]` uses the section's name to jump to the section.
- **Link with text:** `[some ideas][Notes]` hyperlinks text to a section, e.g., "some ideas" to the "Notes" section.
- **Link with custom ID:** Define a heading with a custom ID in braces, preceded by a hashtag symbol, `# Notes {#lab-01}`. Spaces are invalid in the ID. You then reference the section via a link like `[findings][lab-01]`. This can be useful if you have redundant section headings in a document.

Citations and Bibliographies: For academic writing, support for citations and bibliographic references is built-in. When you first create a citation element, a `References`

section will appear at the bottom of the preview and clicking the citation jumps to that section.

To insert a citation link, in square brackets enter an ampersand `@` (Pandoc) or a hashtag `#`, immediately followed by an abbreviation: `[@dt42026,p42]`. Now define the bibliographic entry with the link and text, e.g., `[#dt42026]: DEVONtech *DEVONthink 4 Manual*(2026)`, noting you use a hashtag for the definition. If you need to include multiple citations, add `see` and encompass them all in the square brackets, e.g., `[see @dt42026;cf. @west2017]`.

STYLING

There is a default style built into DEVONthink and it's usually good for quick and easy composition. If you want to make some changes, adjust margins, line width and spacing, and choose a specific Markdown font via the Editing > Format settings.

More complex styling is done with CSS (Cascading Style Sheets), using either internal styling or externally referenced stylesheets. If you have a specific stylesheet you'd like to use globally, you can specify one in the *Files > Markdown > Style Sheet* settings. This will apply the style to all your Markdown documents. If you're creating documents for different purposes or building a style you like, here are options for in-document styling:

- **Internal styling:** You can add styling directly to your document, often placed at the end, inside a styling block, `<style type='text/css'> ... </style>`. Do not include spaces between elements you're styling.
- **HTML Link:** When using an external stylesheet, whether in a database, on your Mac, or online, you can add this style link to your document: `<link rel='stylesheet' type='text/css' href='css/styles.css'/>`
- **XHTML Link:** Another option to use with an external stylesheet is using a metadata XHTML link, e.g., `CSS: css/styles.css`. This needs to be at the very top of the document.

You can also search online to find thousands of tutorials on CSS, as well as many styles. Do note many of the styles are very complex and often made specifically for certain types of web layouts. It's often better to investigate how to style specific things, e.g., tables, as the need arises.

WEBSITE EXPORT TEMPLATES

For exporting selected groups or files as a website, DEVONthink uses templates available in `~/Library/Application Support/DEVONthink/Websites/` to create HTML files from documents. In the save dialog that appears when you use *File > Export > as Website*, click the *Show Options* button, choose a template, and set your options. Then choose your location and export. Listed below are the available templates but feel free to duplicate and modify them to suit your own needs:

- Default
- Footer
- Footer+Header

- Header
- Header+URL+Comment

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

- **%charset%:** The character set of the document. Rarely used.
- **%comment%:** The Finder Comments of the document.
- **%content%:** The body content of each document.
- **%databasePlusLocation%:** The name of the containing database and the group location of the document.
- **%modification%:** The modification date of each document.
- **%stylesheet%:** Any custom stylesheet applied to a document.
- **%title%:** The title of the document.
- **%url%:** The URL of each document.
- **%tags%:** Tags applied to each document.

SCRIPTS

DEVONthink is well known for its automation capabilities and to that end comes with many built-in scripts. Below is a list of the DEVONthink supplied scripts available to you.

SCRIPTS MENU

This is a list of the pre-installed scripts in DEVONthink's *Scripts* menu, presented as they appear in the submenus there:

Bibliography:

- **CrossRef Lookup:** Searches CrossRef for scholarly works by title and sets matching PDF metadata in the *Properties* inspector. If multiple matches are found, a dialog to choose a reference will be shown.
- **Google Books Metadata:** Searches Google Books based on a document's properties, e.g., the title ISBN/ISSN number, etc. Updates the document's title and updates custom metadata, like the publication year in the higher editions.

Chat:

- **Create Image Prompt:** Generate an Image Diffusion prompt from the key point or selected text in a document.
- **Correct Spelling:** Correct spelling in a document based on the context of the words.
- **Insert Response:** Insert an AI response to a question you ask.
- **Transform Text:** Generate changes to selected text based on your instructions. Some formats, e.g, rich text, support replacing the text.
- **Translate Text:** Translate selected text to the language in which DEVONthink is running. This does not correct spelling errors.

Comments:

- **Append Selected Text:** Adds the selected text to the comments of the current document.
- **Assemble:** Collects the comments of the selected documents and creates a new document listing them.

- **Convert to Tags:** Converts the tag contained in the comments field to real tags if the comments field of the selected document contains tags separated by commas.
- **Speak:** Speaks the comments of the selected documents.

Data:

- **Move Duplicates to Trash:** Moves all duplicates of the selected document to the trash.
- **Find & Remove Similar Contents:** Finds and removes similar documents.
- **Group With Duplicates:** Creates a group with duplicates of the selected documents.
- **Group With Replicants:** Creates a group with replicants of the selected documents.
- **Verify & Optimize Databases:** Runs a verification on all open databases and optimizes them if they verify successfully. Errors are alerted and logged to *Window > Log*.
- **Check file integrity of databases:** Runs a checksum comparison on all items in open databases to check for any discrepancies in the current and stored values. Errors are alerted and logged to *Window > Log*.

Download:

- **Linked Images of Page:** Adds linked images of a displayed web page to the database.
- **Open Linked Images in Tabs:** Opens a document tab for each linked image in a web page viewed in DEVONthink.
- **Images of Page:** Adds the images of a displayed web page to the database.
- **Links of Page:** Adds links contained on a displayed web page to the database.
- **Download as...:** Converts bookmarks to one of these formats: *Formatted Notes*, *HTML Pages*, *PDF Documents* (One Page or Paginated), and *Web Archives*. There are also versions for creating clutter-free documents as formatted notes, web archives, and PDF documents (One Page and Paginated).

Edit:

- **Count Characters:** Counts the characters in the current selection.
- **Count Words:** Counts the words in the current selection.
- **Replace text in documents:** Enter text to find and replace in plain and rich text documents.

Execute:

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

Export:

- **Listing:** Saves a UTF-8 text file containing a text listing of the names of all contents/groups of the current database.
- **Daily Backup Archive:** Creates a compressed backup (.Zip) of each open databases. All backups are stored in `~/Backup` and their filename includes a datestamp for easy tracking and identification. These can be useful for copying to external media or uploading to a cloud service as a secondary backup strategy. Note: When using this script with

an encrypted database, the database will be compressed in an unencrypted state.

Feeds:

- **Nature -- Hubble News:** Downloads the latest Hubble news.
- **iTMS -- Added Albums:** Downloads covers of albums recently added to the iTunes Music Store.

Format:

- **Body Normal:** Formats selected text as "Body Normal".
- **Body Small:** Formats selected text as "Body Small".
- **Header Capitalized:** Formats selected text as "Header Capitalized".
- **Header Main:** Formats selected text as "Header Main".
- **Header Secondary:** Formats selected text as "Header Secondary".
- **Remove Attachments:** Removes attachments from RTFD files.
- **Remove Links:** Removes linked text from the contents of a selected rich text document.
- **Source:** Formats selected text as "Source".
- **Reset Spacing:** Resets the line and paragraph spacing of selected rich text.

Images:

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

Import:

- **Man Page:** Imports a UNIX manual page as a plain text document.
- **Perldoc:** Imports the documentation of Perl pages, modules, functions, or programs.

Reminders:

- **Add as Event to Calendar:** Adds a new event to Calendar linking back to the selected item in DEVONthink.
- **Add as To Do to OmniFocus:** Adds the selected item as a to-do item to OmniFocus.
- **Add as To Do to Reminders:** Adds the selected item as a to-do item to Reminders.
- **Add as To Do to Things:** Adds the selected item as a to-do item to Things.

> Note: These are scripts for integrating with external applications. For scripting internal reminder scripts, see the Reminder Scripts section of the chapter about automation.

Rename:

- **Append Selected Text:** Appends the selected text to the title of the currently selected item.
- **Change Case:** Change the case of selected text to titlecase.

- **Replace Text:** Replaces a text passage in the titles of selected documents.
- **To Webpage Title:** Sets the titles of the selected documents to the names of the web pages pointed to by their URL fields.
- **To Subject:** Sets the titles of the selected documents to the subject lines of the email messages if the selected documents are email messages.

Sheets:

- **Add Multiple Records:** Adds up to 999 empty records to a sheet.
- **Column Sum & Mean Value:** Calculates the sum and average of a table column.
- **Row Sum & Mean Value:** Calculates the sum and average of a table row.
- **Check sums in last column:** Checks the sums in the last column on validity.

Tabs:

- **Open Bing:** Open a new tab for the Bing search engine.
- **Open Google:** Open a new tab for the Google search engine.
- **Open Location:** Open a new tab for a location you specify.

> Note: The last script does no URL validation, though DEVONthink's dictionary makes it possible to script this too.

Thumbnails:

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

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

SMART ITEM SCRIPTS

These are scripts available to smart items, i.e., smart rules and batch processing. They are divided by the two available actions: `Apply Script` and `Script with Input/Output`.

Apply Script:

- **Add Favicons:** Attempts to apply the favicon for a web-based document, e.g., a bookmark.
- **Add Web Page Image:** Attempts to apply a web page's image as the document's thumbnail.
- **Close All Databases:** Closes all open databases except the *Global Inbox*.
- **Close All Documents:** Closes all document windows.
- **File Items Using @Destination in Name:** If a filename is suffixed with @ followed by a group name, it will be used to file the document into a matching group. For example, a document named `Marriott stay@Expenses` would be filed in an "Expenses" group. If a group isn't found, it will be created in the Inbox of the parent database.
- **Reminders - Next Week:** Set a reminder for a week from the current time and date.

- **Reminders - Remove:** Remove an applied reminder from the matched item(s).
- **Reminders - Tomorrow:** Set a reminder for the same time tomorrow.
- **Tags - Add Most Important Words:** Adds the top five words from the concordance of the document. Assessed by weight.

- **Assign Document Date & Amount:** Adds a detected date and amount to the document as *custom metadata*.
- **Downloads - Add Embedded Images:** Add embedded images in a web-based file to the *Download Manager*. Used with HTML-based files, e.g., web archives, etc.
- **Downloads - Add Linked Images:** Add linked images to the *Download Manager*. Used with HTML-based files, e.g., web archives, etc.
- **Downloads - Add Podcasts:** Add detected podcast links to the *Download Manager*. Used with podcast RSS feeds containing download links.
- **Download Bibliographic Metadata:** Attempts to retrieve the digital object identifier (DOI) of the document and set the title and metadata.

Script with Input/Output:

- **Annotation - Append Text:** Gets text from a `Set Script Input` action and either creates an annotation file with the text or appends it to an existing one.
- **Annotation - Get Text:** Gets the text from an existing annotation file, if one exists.
- **Checksum:** Returns the content hash for the record.
- **Coordinates:** Returns the latitude and longitude from the geolocation data on the item.
- **Daily Quote:** Gets a random daily quote from an English and a German site.
- **Image Size:** Returns the width and height of an image.
- **Latest News:** Returns a random headline from the New York Times or Tagesschau.
- **Name - First Number:** Returns the first number in a record's name.
- **Name - Last Number:** Returns the last number in a record's name.
- **Text - Lowercase/Uppercase:** Returns the text of a Set Script Input placeholder to lower or uppercase.
- **Text - Random String:** Returns a 16 character string of random letters and numbers.
- **Web Page - Description:** Returns the description from the metadata of a web page, if available.
- **Web Page - Keywords:** Returns the keywords from the metadata of a web page, if available.
- **Zettel-ID:** Queries Markdown metadata and returns the value for a `Zettel-ID` attribute.

You can read more about how to use these scripts in the Smart Rules and Batch Processing section of this manual.

SMART RULE EVENTS AND ACTIONS

DEVONthink provides many powerful actions for use with smart rules and batch processing. Smart rules run when certain events happen, e.g., when you open a file or DEVONthink syncs. These are called event triggers and are listed first. Following that are the available actions for both functions.

EVENTS

When an action is triggered is almost as important as the action itself. Actions can be triggered when any of these events occur:

- **On Demand:** Run only when *Apply Rule* is selected in a context menu or Tools > Apply Rules.
- **On Startup:** Runs when DEVONthink launches.
- **Before Synchronization:** Runs all actions before DEVONthink begins synchronizing to any sync location.
- **After Synchronization:** Runs all actions after DEVONthink completes synchronizing to any sync location, i.e. all uploads, downloads, and changes are committed.
- **On Quit:** Runs when DEVONthink quits.

- **Every Minute:** Runs the specified actions every minute.
- **Hourly/Daily/Weekly:** Runs the specified actions on an hourly, daily, or weekly schedule.
- **On Workdays:** Runs on Monday through Fridays.
- **On Weekends:** Runs on Saturday or Sunday.

- **On Creation:** Runs when a new document is created in the specified location.
- **Via Sorter:** Runs when creating various note types via the *Sorter*.
- **Before Saving:** Runs before saving a matched document.
- **After Saving:** Runs after saving a matched document.
- **On Imprinting:** Runs when any matched document has been imprinted.
- **On Import:** Runs when documents are added to the specified location.
- **On Clipping:** Runs when documents are added via clipping, e.g., via menu commands, the *Sorter*, DEVONagent, bookmarklets, or AppleScript.
- **On Download:** Runs when items are downloaded via DEVONthink's *Download Manager*.
- **On Scan:** Runs after a scanning operation has completed.
- **On OCR:** Runs after an OCR operation has completed.
- **On News:** Runs when an RSS feed refreshes and receives new articles.

- **On Upload:** Runs when an item is uploaded through DEVONthink's web server.

- **On Open:** Runs when a matching item is opened in a new document window or viewed in a main window.
- **On Open Externally:** Runs when a matching file is opened in an external application.
- **On Edit Externally:** Runs after a document is edited in an external application and saved.
- **On Launch URL:** Runs when the URL associated with the item is launched.
- **On Reminder:** Runs when an alarm set on a matching item's Reminder comes due.

- **On Renaming:** Runs after matched items are manually renamed.
- **On Commenting:** Runs after modifying *Finder Comments* on an item, including changes made to indexed items in the Finder.
- **On Labelling:** Runs when a label is added to or changed on an item.
- **On Flagging:** Runs when an item is flagged.

- **On Rating:** Runs when the *Ratings* on an item are modified.
- **On Moving:** Runs when matched items are moved to the specified location.
- **On Classifying:** Runs when matching items are classified by DEVONthink.
- **On Tagging:** Runs when matched items are tagged
- **On Replicating:** Runs when matched items are replicated.
- **On Duplicating:** Runs when matched items are duplicated.
- **On Convert:** Runs when an item is converted to a new format.
- **On Moving into Database:** Runs when indexed items are moved into the database, becoming imported items.
- **On Moving to External Folder:** Runs when imported or created items in a database are moved to external locations, becoming indexed items.
- **Before Trashing:** Runs before a database's Trash is emptied.

You can add and remove multiple event triggers by pressing the + or - buttons. For example, you could use an *On Import* and an *On Moving* event trigger to act on imported items or items being moved in your databases.

ACTIONS

The power in smart rules and batch processing is found in the actions. DEVONthink provides actions that cover simple tasks, e.g., prefixing a filename, all the way to ultra-powerful AppleScript injection via external or embedded scripts. Since you can chain multiple actions together, the possibilities are nearly endless.

Note batch processing supports a smaller number of actions than smart rules. Here's a list of available actions with those also usable in batch processing marked with "(BP)":

- **Bounce Dock Icon:** Causes DEVONthink's dock icon to bounce. This will only trigger when DEVONthink isn't the active application.
- **Display Notification:** Shows a message via the Mac's Notification Center. Notifications need to be enabled in *System Settings > Notifications* for *Display Notification* to operate correctly.
- **Display Alert:** Shows a message in an alert window.
- **Speak Text:** Using your computer's voice synthesis, it will speak the message you specify.
- **Play Sound:** Plays a selected system alert sound.

- **Send Mail:** Enter email addresses to send the matching items. This can be a comma-delimited list of addresses, names, or enter the name of a group you've defined in your contacts.
- **Add to Reading List:** Add the matched items to the Reading List.

- **Open:** Opens a file that triggered or was produced by a smart rule in a document window.
- **Open Externally:** Opens the matched file in the system default application.
- **Launch URL:** Opens the *URL* shown in the *Generic Info* inspector for a matched item.
- **Apply Rule:** Perform the actions of another smart rule on items passed by the current smart rule. The items passed by the initial smart rule must match the criteria of the

second smart rule to trigger it. This can be useful after performing smart rule actions like OCR or executing scripts, helping to avoid redundant or scheduled smart rules.

- **Stop evaluating rules:** Stops the rule from proceeding to subsequent actions. Most often used while developing and debugging a smart rule.
- **Find & Replace:** Scans one of several attributes or custom metadata fields for specified text and replaces it with another value you provide. You can scan a matched item's: *Name*, *URL*, *Aliases*, and *Finder Comments* as well as custom metadata with a Single/Multi-line Text or an Identifier data type. Supports case-sensitivity. *(BP)*

Item scanning: Supported both in smart rules and batch processing, the next actions allow you to scan the name or text of a document and use the results when found. Each of the actions also has a parameter you specify for the type of data you're scanning for. These actions and parameters can be used with subsequent actions that support placeholders, e.g., `Scan Text: Date` → `Document Date` with `Change Modification Date`. If the action returns no results, actions using the results will not be executed. However, unrelated actions in the smart rule chain will be executed normally.

- **Scan Name:** Scans the name of the file. *(BP)*
- **Scan Text:** Scans the contents of the file. *(BP)*

The following four parameters are used with the *Scan Name* and *Scan Text* actions. With *String*, *Date*, and *Amount*, a prefix and/or suffix before/after the wildcard has to be specified.

- **String:** An asterisk (`*`) wildcard specifies data to be captured. Other terms added will be used to help locate the desired string. In subsequent actions, use the *Document String* placeholder to represent the captured string.
- **Date:** Similar to *String* parameter, use the desired format of the *Document Date* placeholder to represent the captured string in subsequent actions.
- **Amount:** Similar to *String* parameter, use the desired format of the *Document Amount* placeholder to represent the captured string in subsequent actions.
- **Regular Expression:** Items in parentheses are captured; items outside parentheses are ignored. You can specify multiple captures in an expression. Using the captured text in subsequent actions is specified by using backslash, `\`, and the number of the capture, starting at `1`. Note we use Apple's NSRegularExpression which supports the ICU regular expression syntax.

> **Example:** Using the *String* parameter, `Invoice *` would capture `0012345` in a file named "Invoice 0012345".
> Using the *Date* parameter, `*` would capture the date in a file named *2020-01-01*.
> Using the *Amount* parameter, `$*` would capture the dollar amount detected.

> Using the *Regular Expression* parameter, `Bill To: ([A-Za-z0-9 ,]+)` would capture the name of the person or company billed. `\1` would be used in the subsequent action.

Scripting and Chat: These commands are used for adding script actions processes or integrating an AI model, e.g., ChatGPT, into your automations. You can read more about these actions in the Smart Rule Scripts section.

- **Apply Script:** Run a script on the matched or selected items. Choose a script from installed *External* scripts. Or choose *AppleScript*/*JavaScript* and write your code in the embedded script editor popup. Embedded scripts are only available to the smart rule they are created in. *(BP)*
- **Set Script Input:** Choose a property, e.g., the aliases of a file or a chat response, and create a variable for use in a smart rule script. *(BP)*
- **Script with Input/Output:** Receives the value of a *Set Script Input* variable and uses it in the script. Outputs from a `return` command to a `Script Output` placeholder, if passing the results on to subsequent actions. Either action is optional. *(BP)*

- **Chat - Query:** Receive an response from a specified AI model to your prompt. Optionally, include a document related to the query. *(BP)*
- **Chat - Continue if...:** A special conditional action that controls whether subsequent actions should be executed based on a "yes" or "no" response to an AI query. *(BP)*

Batch Processing Only: There is one action found only in batch processing: *User Input*. As batch processing is a more impromptu mechanism, it's a good place to allow user interaction. This smart action opens a dialog for you to enter information, e.g., to type a prompt, enter a name, etc. The result is stored in the *User Input* placeholder, used by a variety of actions.

- **Change Name/Aliases/Comment/URL/Label/Rating:** Change the specific attribute of the matched file. For items with an existing attribute, e.g., a comment, a placeholder will preserve the existing value. *(BP)*
- **Mark:** Toggle the state of read/unread, flagged/unflagged, and locked/unlocked. Note you cannot change more than one of these attributes with one action, but you can chain more than one *Mark* action in the smart rule. *(BP)*
- **Change Creation/Modification Date:** Change the creation or modification date of matched files to: current, addition, creation, modification, or the document date. *(BP)*

- **Add Tags:** Add tags to the matched files. As you type, tags from all open databases will be suggested. Press the *semicolon (;)* key to commit the tag. *(BP)*
- **Add Tags from Document:** Adds existing tags if they are detected in the matched document's contents. *(BP)*
- **Remove Tags:** Removes specific tags you enter. *(BP)*
- **Remove All Tags:** Removes all tags from the items. *(BP)*
- **Tags:** Adds or converts tags to matched documents from these commands:

Convert HashTags, *Convert Keywords*, *Convert Properties*, *Convert Geolocation*, *Add Vision Suggestions to Images*, and *Scan Barcodes*.

- **Move/Replicate/Duplicate:** Move, replicate, or duplicate a matched file to a chosen location.
- **Duplicate & Continue:** Duplicates matched files and applies subsequent actions to the copies.

- **File:** Allows you to file items into a group. Specify subgroups using a forward slash, e.g., `2019/DEVONtech` would create or file into the DEVONtech subgroup of a 2019 group in the current group. You can use placeholders to define the location. *(BP)*
- **Classify:** Using DEVONthink's internal AI, you can classify matched items to *the Same Database* or *Any Database*. Pro and Server users can also use AI to determine a filing location via the *Via Chat* option.

- **Move Into Database:** Moves indexed items into the database, essentially importing them. Note this removes the file from the original location in the filesystem.
- **Move To External Folder:** For an item located in an indexed group, this moves the file to the indexed folder in the Finder.
- **Check Bookmarks:** Checks the URL of the matched items. Any issues are reported in the *Log window* or the *Log popover*.

- **Convert:** Attempts to convert files into plain/rich text, formatted notes, Markdown, HTML, web archive, or PDF.
- **Convert & Continue:** Converts a file and applies subsequent actions to the newly created file.
- **Thumbnails:** Adds, updates, or removes a matched file's thumbnail.
- **Move to Trash:** Move the item to the database's trash. The items are not removed from the database until the trash is emptied.
- **Delete:** Be very cautious with this option. Delete truly deletes a file. It is not sent to the database's trash. It is not sent to the Finder's trash. It is completely deleted.

The following smart actions are only available in the higher editions of DEVONthink. You will find them throughout the list of actions in the dropdown menu as you're creating your smart rule.

- **Recognize:** Processes a compatible media file based on your choices in the *AI > Transcription* settings.
- **OCR:** This will perform OCR on a file, if possible. Choose a format to generate a new file in the selected file type. Note the file type selected will override the option set in Settings > OCR > Convert incoming scans to. Choose *Apply* to convert a matched file directly to a PDF with OCR. This action does not generate new files.
- **OCR & Continue:** Performs OCR on a file, producing a new document, and applies subsequent actions to the newly created document.
- **Imprint:** Apply the selected imprint to any matching files, if possible.
- **Import Email Attachments:** Import attachments from matching emails.

Custom Metadata: If you have specified custom metadata fields, you will have options to change values with an action. For example,

if you had a Boolean field named "Done", you could have the action set this field to true when the action is triggered. *(BP)*

MCP SERVER

As discussed in the Getting Started > AI in Practice section, an MCP server is a controller between DEVONthink and external AI applications, giving them commands and controlled access to your databases. Here we'll cover some benefits and setup information. As Anthropic is the one who started this all and setting up MCP with their Claude application requires very little effort, we'll use it as our example.

For those curious about advantages of using the MCP server, here are some things to know:

- **Requires No Coding:** No programming skills are needed — just the ability to compose a clear query or command.
- **Easy to Install:** The MCP server is a core part of DEVONthink, requires no separate modules, and updates automatically with the application.
- **Targeted Editing:** When editing text documents, the AI works on specific sections rather than rewriting the whole document, reducing the risk of unintended changes.
- **Local by Default, Remote Optional:** The server runs on your local machine by default. Remote access is possible but requires much more configuration.
- **Safe and Private:** The AI has no access to your database internals; all changes are controlled by DEVONthink. Sensitive data (credit cards, passwords, etc.) is stripped before it reaches the LLM, items excluded from *AI > MCP* access are fully ignored, and your documents never leave your Mac beyond what the LLM sees during a conversation.

And if you're wondering what kinds of things you can do with the MCP server, there are many commands, capable in isolation and powerful when run in combinations. Here are some aspects of DEVONthink you can control via the MCP :

- **Database & Navigation:** Get information about databases, selections, group hierarchies, etc.
- **Record Management:** Create, modify, organize, and delete items. Get and set metadata on items, e.g., tags, labels, properties, etc. Import and export documents.
- **Search & Discovery:** Search for items, classify documents, lookup similar records or ones identified by attributes like name, path, etc.
- **External AI Features:** Process image data with vision, transcribe audio, extract content for AI use, or use AI searches, e.g., on PubMed or arXiv.
- **Content Processing:** OCR scans, convert between formats, merge documents, or clip web content into your databases.
- **Academic/Research Tools:** Extract DOI/ISBN/ISSN numbers, find and download documents based on those and other attributes, get and apply bibliographic metadata to documents.

So you can command your AI application with directives like, `Transcribe the interview recordings from today and`

`save the transcript as a Markdown note, grouped by the interviewee name in a monthly group.`

BASIC SETUP

DEVONthink's MCP server is built to be run and accessed on the same Mac, letting you leverage an external LLM and our application's powerful automation functions. Fortunately, the setup is usually very simple as illustrated in the next paragraph.

First you need to set up DEVONthink's MCP server in the *AI > MCP* settings. To get up and running quickly, we'll just check *Redact sensitive content* and *Install for Claude Desktop*. Logically, if you're using Claude Code, Codex, or the Hermes Agent, you would install the appropriate option. Enabling *Launch at login* is a good idea and lessens friction if you choose to explore other applications in the future. Now open Claude.app and ask something DEVONthink-related, like, `List the documents added yesterday, but ignore RSS articles.` You are now using our MCP server to interact with your documents and databases!

Other MCP Clients: You may not be running one of the support AI applications but that doesn't mean you're out of luck. Refer to the client's documentation to see if it supports standard input/output (stdio) or URL-based communication and how to set up the MCP connection. But be aware setting up access from other applications may require editing a configuration file manually.

HTTP Connections: Some AI applications use a web-based method, e.g., `http(s)`, for the communication. DEVONthink supports this as well, even as an alternate connection method for those supporting both. For connecting on your Mac, the server listens at `http://localhost:8420` by default, requiring no authentication or encryption required. It communicates using JSON-RPC 2.0 over `POST` requests with a `Content-Type: application/json` header, a commonly used method.

You also need to register the server URL with your MCP application so it knows how to connect. When used with the supported clients, do this to use the URL access method. Check the documentation for configuring other clients.

Open `/Applications/Utilities/Terminal`, paste the appropriate command for your application, and press Return.

> **Terminal:**
>
> ```
> # Claude Code
>
> $ claude mcp add --scope user --transport http devonthink http://localhost:8420
>
> # Codex
>
> $ codex mcp add devonthink --url http://localhost:8420
>
> # Hermes Agent
>
> $ hermes mcp add devonthink --url http://localhost:8420
> ```

ADVANCED SETUP

While initially built for on-device access, it's also possible to connect another device to the MCP server. When connected to the MCP server, you can make inquiries about the host's databases and even run skills based on

the replies. While we can't offer application-specific instructions for every instance, here is a generic overview of the requirements.

If you want to access your DEVONthink MCP server from another Mac or device on your network, you'll need two important authentication elements: a TLS certificate and a bearer token. The server won't allow network access without both pieces in place.

Bearer Token: This is a long alphanumeric code specific to your MCP server. When a device tries to connect to the MCP server, it must present this token or it will be denied access.

TLS Certificate: The server can use a proper TLS identity stored in your macOS Keychain. For local access, e.g., offline Macs, a certificate isn't required but still recommended. Self-signed certificates won't work so you'll need one from a trusted Certificate Authority. While we can't provide explicit instructions for getting a certificate, some common places to acquire one are: from your organization's IT department, via Let's Encrypt in conjunction with tools like Certbot, or by purchasing one from providers like DigiCert or Sectigo.

Once you have your certificate, import it into Apple's Keychain Access application. Double-click the keychain entry, open the *Trust* section, and set it to *Always Trust*. Save the change when closing the window then return to DEVONthink. If set up properly, you should see it appear *TLS Certificate* popup discussed below.

Setting up the Server Mac: Once you have acquired and added a TLS certificate to Keychain Access, setting up the server Mac is straightforward. Open the *AI > MCP* settings and do these things:

- Enable *Launch at login*. This ensures the server is up and running when DEVONthink launches.
- Set the *Accept Connections* popup to *From the local network*. Note the *URL* field as you will use it on the connecting device.
- Click the *Create* button to generate a new *Bearer Token*.
- If you have a TLS certificate, select it in the *TLS Certificate* popup.
- Optionally, set a specific *Port* if you need to.

> Note: Changing these settings modifies the MCP configuration file so you don't have to manually change it. However, if you know what you're doing, the file can be found at `~/Library/Application Support/DEVONthink/MCP/config.json`.

Connecting from Another Mac: Once the host Mac is configured, add access to the server on the connecting Mac using your client. Armed with the URL and bearer token, this may be done in the Terminal application, e.g., for Claude Code:

> **Terminal:**
>
> ```
> $ claude mcp add --scope user --
> transport http devonthink https://your-
> host.local:8420 \
> ```

In the above command, replace `your-host.local:8420` with the URL and port and `<your-token>` with the bearer token

from the server Mac's settings. Consult the documentation for other MCP-capable applications.

And for other applications, you may need to edit a configuration file, either manually or via the client's settings. Again, consult its documentation.

CONTROLLING MCP'S BEHAVIOR

When you start using the MCP server, you may be prompted to allow access to certain locations. You may also be asked to allow use of the MCP tools. This behavior will vary, depending on the client application. We will use Claude Desktop as an example.

The first time Claude uses a specific tool, you will be asked to allow the behavior. Choose *Allow Once* or *Always Allow*, whichever you're comfortable with. However, you can not only view but also control access or prohibit certain functions from the MCP server.

- **Step 1:** In the Claude application, choose *Claude > Settings* or press ⌘,.
- **Step 2:** Click *Connectors* and you should see, e.g., *DEVONthink LOCAL DEV*. Tap the *Configure* button.
- **Step 3:** Here you can view the list of commands available. For a specific command, click the encircled checkmark icon to always allow, the hand icon to require permission, and the circle-backslash icon to block the command entirely. Optionally, you can choose one setting for all commands via the *Custom* popup menu, e.g., always allowing all of them.

HIDDEN PREFERENCES

There are a few settings in DEVONthink not available through the application *Settings*. Most of them are intended to facilitate customer support but they might be interesting for you as well.

> Note: These hidden preferences could be changed or removed with any update.

HOW TO USE THE HIDDEN PREFERENCES

You can toggle or set values for hidden preferences using the `defaults` command in the Terminal application. When setting these preferences via the Terminal, DEVONthink should not not be running or the changes may not be preserved when quitting.

To set a preference using the Terminal, noting the commands are case-sensitive, they are written like this (excluding the parentheses): `defaults write com.devon-technologies.think (the preference name) (the preference type) (the value)`. For example, the following command enables the preference by setting a `-bool` (boolean type) to `TRUE`:

> **Terminal:**
>
> ```
> $ defaults write com.devon-technologies.think ShouldScaleAttachedImages -bool TRUE
> ```

Some hidden preferences require you to specify a numeric value, e.g., *CounterDigits*. These types of preferences also need to be set via a Terminal command. Use the `-int` (integer) type before specifying the number, like so:

> **Terminal:**

```
$ defaults write com.devon-
technologies.think CounterDigits -int 3
```

Other preferences use a `-string` type. For example, there is a preference to allow DEVONthink to detect other plain text formats as plain text, `AdditionalPlainTextExtensions`. As this command replaces the existing list of additional plain text extensions, we recommend that you first read the current list (empty by default) before adding your own to them.

Terminal:

```
$ defaults read com.devon-
technologies.think
AdditionalPlainTextExtensions

2014-07-31 08:25:27.101
defaults[21950:3312262] The domain/
default pair of (/Users/eb/Library/
Preferences/com.devon-technologies.think
AdditionalPlainTextExtensions) does not
exist

# This "error" shows there are no
additional formats specified.

$ defaults write com.devon-
technologies.think
AdditionalPlainTextExtensions -
string .otl.todotxt

$ defaults read com.devon-
technologies.think
AdditionalPlainTextExtensions

.otl.todotxt
```

AVAILABLE HIDDEN PREFERENCES KEYS

Here is a list of the available hidden preferences. Each one includes a description, its data type, and an example value:

- **AdditionalPlainTextExtensions:** Adds additional plain text extensions, separated by dots. In Terminal: `-string .dxf.nc`.
- **AVSkippingInterval:** Specify the numbers of seconds to skip forward or backward when using the right and left arrow keys with Shift held in audio/video files. The default is 15 seconds. In Terminal: `-int 5`.
- **AdditionalXMLExtensions:** Adds additional XML file name extensions, separated by dots. In Terminal: `-string .mathml`.
- **BatesNumberDigits:** Specifies the number of digits used for the Bates Numbering via the placeholder or scripting. In Terminal: `-int 4`.
- **CounterDigits:** Specifies the number of digits used for the *Counter* placeholder. In Terminal: `-int 5`.
- **DatePlaceholdersWithoutLeadingZeros:** Disables date and time placeholders from using prefixing zeros. In Terminal: `-bool FALSE`.
- **DisableActivityWindow:** Disables automatically showing/hiding of the *Activity* window. In Terminal: `-bool TRUE`
- **DisableAutomaticUpdatingOfIndexedItems:** Disables automatic updating of indexed items. In Terminal: `-bool FALSE`
- **DisableBadgeLabel:** Disable the badge label on DEVONthink's Dock icon. In Terminal: `-bool FALSE`
- **DisableFileSystemEvents:** DEVONthink no longer listens to file system events. In Terminal: `-bool FALSE`
- **DisableFileCoordination:** DEVONthink no longer uses file coordination, registering its interest in certain files and waiting for replies. This can cause very long delays if the coordinating process isn't responding quickly. In Terminal: `-bool TRUE`

- **DisableHighlightColorMapping:** Uses the same colors when highlighting documents in dark and light mode. In Terminal: `-bool FALSE`
- **DisablePDFDarkMode:** Disables the dark mode appearance for PDF documents. In Terminal: `-bool FALSE`
- **DisablePDFValidation:** Disables validating PDFs created by merging, converting, or clipping. In Terminal: `-bool FALSE`
- **DisablePreprocessedClipping:** Disable additional processing of a web page's content before sending the clipped file to DEVONthink. In Terminal: `-bool TRUE`
- **DisableRelativeDates:** Disable displaying relative dates, e.g., "Today" in the item list. This will instead always show absolute dates, e.g., "2023.02.14". In Terminal: `-bool TRUE`
- **DisableTagAutocompletion:** Disable displaying the popup of tag suggestions when entering tags, e.g., in the Tags bar. In Terminal: `-bool FALSE`
- **DontAutomaticallyEnableOperatorsOptions:** After a toolbar search, disables automatically enabling the *Operators & Wildcards* option in the *Search* inspector. In Terminal: `-bool FALSE`
- **DontSetFindPboard:** Disable using macOS' shared pasteboard, avoiding search terms from being automatically used in other applications. In Terminal: `-bool TRUE`
- **EnableApplicationFiles:** Applications can be imported/indexed. In Terminal: `-bool TRUE`
- **EnableFSEventLogging:** Enables logging of filesystem events when requested by our support team. This setting should not be needed for general use. In Terminal: `-bool TRUE`
- **EnableEvernoteRTFDImport:** Enable this to import notes from Evernote notebooks as rich text files. In Terminal: `-bool FALSE`
- **EnableSearchFieldAutocompletion:** Enable this to have DEVONthink attempt to complete search strings as you type them in the toolbar search field. Note this option only works when the search options *Live while typing* and *Partial matches while typing* are disabled. (See also p. 127ff) In Terminal: `-bool FALSE`
- **ForceEditablePDFs:** Some PDFs contain objects that are problematic for Apple's PDFKit. DEVONthink opens these files in a read-only state. Enable this option to disable this behavior and open all PDFs as editable. Note: This does not eliminate the potential for problems with certain PDFs. In Terminal: `-bool TRUE`
- **IndexRawMarkdownSource:** Index the source code of Markdown files instead of the rendered content only. In Terminal: `-bool TRUE`
- **MaximumNumberOfRecentDestinations:** Specify the number of recent destinations shown in the *Recent Destinations* section of the context and popup menus, e.g., in the Move To popover. The default value is `10`. In Terminal: `-int 15`
- **MaximumNumberOfRecentSearches:** Specify the number of recent searches available in the toolbar search field or the *Search* inspector. The default value is `10`. In Terminal: `-int 15`.
- **MonospacedSidebarFont:** Use a monospaced system font in the sidebars of main windows. In Terminal: `-bool FALSE`
- **MonospacedViewFont:** Use a monospaced system font in the item list of main windows. In Terminal: `-bool FALSE`

- **PersistentSortingOfSearchResults:** Retains the last sort method used in database search results. In Terminal: `-bool TRUE`
- **PlainTextIsMarkdown:** Treat all plain text files as markdown. In Terminal: `-bool TRUE`
- **RawMarkdownPasting:** When pasting rich content into a Markdown file, the formatting is converted to Markdown. Enable this to ignore formatting and paste as raw plain text. In Terminal: `-bool TRUE`
- **RawOPMLImport:** Imports `.opml` files as native files instead of parsing and creating groups, feeds, etc. from them. In Terminal: `-bool FALSE`
- **RichNotesWithoutAttachments:** Services create RTF instead of RTFD. In Terminal: `-bool FALSE`
- **ShowAdditionalInfoInPathBar:** Shows some details about the selected item in the *Information Bar*. In Terminal: `-bool TRUE`
- **SyncDebugLog:** Enable additional sync logging for debugging. In Terminal: `-bool TRUE`
- **WindowToolbarStyleExpanded:** Enable the expanded toolbar style on macOS Big Sur. This shows the title bar above the toolbar instead of the new unified default style. In Terminal: `-bool TRUE`
- **WindowToolbarTitleHidden:** Disables showing the window title in main windows. Note this only works if the `WindowToolbarExpanded` hidden preference is not used. In Terminal: `-bool TRUE`

- **ServerDebugLog:** Enable additional logging for debugging DEVONthink's webserver. In Terminal: `-bool TRUE`

READ ME

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This chapter contains the version history of DEVONthink, our end user license agreement (EULA), and credits.

VERSION HISTORY

New Improved Fixed Removed

VERSION 4.4.1

This maintenance and feature update to DEVONthink brings significant enhancements to Markdown and document editing, web clipping, AI workflows, and overall system performance. Create and edit tables directly in the Markdown WYSIWYG editor without touching raw syntax, take advantage of automatic renumbering for numbered lists, and export documents using a completely rewritten Word engine that faithfully preserves styles, citations, and MathJax formulas. Web clipping and the clutter-free reader view now leverage publisher-provided Markdown streams, retaining article subtitles, image captions, and rich metadata across capture formats.

For Pro and Server editions, DEVONthink 4.4.1 accelerates Apple Mail integration with up to 30 times faster message listing and background hierarchy loading. The AI toolset expands with the new Chronology skill, support for OpenAI's GPT 6 Astra, Sol, and Luna, and GPT-Image-2.5, Claude Fable 5.1 and Opus and Sonnet 5.5, remote Gemini transcription, and search integration with Tavily and Brave. Server editions now allow downloading complete groups from the web interface, powered by an asynchronous engine with virtually no memory overhead for multi-gigabyte transfers. Comprehensive compatibility updates for macOS 26 Tahoe and macOS 27 Golden Gate, along with overall reliability and performance improvements, round out this release.

- The new *Edit Table* button in the *Editing* bar, the context menu, and the *Tools > Markdown* menu lets you visually create a WYSIWYG Markdown table with a grid picker. Commands and buttons in the same places let you add, move, or remove columns and rows and change column alignment. As in sheets, ↩ in the last row or ⇥ in the last cell adds a new row, and ⇥ and ⇧⇥ move forward and backward between cells.

- The new *Edit List* button in the *Editing* bar, the context menu, and the *Tools* > *Markdown* menu creates a Markdown list at the cursor, converts selected text to a list, or changes the type of an existing list.
- Ordered lists in Markdown renumber automatically when you insert or remove items, and nested lists update independently of their parent lists.

- **Pro** — A new *Chronology* skill in the *AI > Library* settings turns selected documents or the contents of a group into a dated timeline, with each event linked to its source document. It lists contradictions between the sources and keeps undated information separately.
- **Pro** — DEVONthink supports Tavily and Brave Search as providers in the *AI > Search* settings.
- **Pro** — The *AI > Transcription* settings offer remote transcription via Google Gemini.

- **Server** — The *web interface* supports downloading complete groups.

- *File > Export > as Word 2007 document (DOCX)* uses a new Markdown renderer that keeps tables, quotes, callouts, images, links, lists, footnotes, and headings as Word styles, links citations to their references, and turns a table of contents into an updatable Word field. It also converts MathJax formulas.
- Web clipping, clutter-free clipping, and the *Reader* view use a page's published Markdown version when available, which yields complete pages even when a page is rendered with JavaScript.
- The up and down arrow keys move the cursor row by row within the same column of a Markdown WYSIWYG or rich text table.
- Markdown themes define their own color for wiki links, separate from the color of regular links.
- Markdown documents containing many images open and scroll more smoothly in WYSIWYG view. Also, images that finish loading above the current scroll position no longer push the text you are reading out of view.
- Custom Markdown style sheets can override the image scaling of the built-in style sheet.
- Markdown documents written in right-to-left scripts, such as Arabic or Hebrew, open with their writing direction determined by their text instead of the interface language.
- CriticMarkup text appears in the theme's insertion color instead of as plain underlined text in previews and HTML conversions.
- Syntax colorizing in Markdown colors strikethrough text, CriticMarkup deletions, and CriticMarkup insertions the same way as the rendered preview.
- DEVONthink Markdown retains formatting, inline code, and links in sub- and superscript text.
- Citations in rendered Markdown show their number from the references list, e.g., `(1)` or `(p. 42, 1)`, instead of the cite key and no longer appear in italics. Several citations in one bracket also share a single pair of parentheses.
- DEVONthink Markdown accepts MultiMarkdown's doubled delimiters for mathematical content, `\\(...\\)` and `\\[...\\]`, so formulas appear typeset instead of as LaTeX source code, including in the *Chat* assistant.

- Converting rich text to Markdown is more accurate.
- DEVONthink embeds images on clipped web pages that use `<picture>` or `srcset` instead of linking to them, so captures no longer depend on the original site.
- Markdown clippings from documentation sites, e.g., Swift-DocC or Sphinx, keep headings as plain headings with their anchor ID instead of turning them into links to their own anchor. Genuine links in headings remain intact.
- Clutter-free clipping adds metadata to PDF, RTF, formatted note, HTML, web archive, and plain-text documents, as it already did for Markdown via frontmatter.
- Clutter-free clipping and the *Reader* view include article subtitles published by Substack, The Atlantic, The Guardian, and other sites.
- Clipping web pages as Markdown, clutter-free documents, or PDF is faster and more reliable, as DEVONthink captures pages directly instead of using the background download service.
- Clutter-free clipped forum and helpdesk threads start with the thread's title.
- Clutter-free clippings omit empty paragraphs, figures, and lists left behind by cleanup. Markdown conversion also omits empty width and height attributes for lazy-loaded images.
- The *Reader* view and clutter-free captures omit MediaWiki's "Jump to navigation" and "Jump to search" shortcuts.
- Markdown clippings use a picture's own caption, such as a photo credit, instead of a title that repeats the image description. Metadata for these clippings includes the date when available.
- Items in the trash no longer appear in bold (for example unread or duplicated items), and the strikethrough is drawn lighter, so their names are easier to read.
- Windows report the document's item link through Accessibility, e.g., for screen readers.
- In the *Help* viewer, the back and forward buttons appear in the content pane, similar to Apple's help, and the toolbar shows the Help Assistant's chat buttons.
- Removing smart rules via the *Support Assistant* is more reliable.
- In narrow windows, an overflow button at the end of the *Navigation* and *Editing* bars shows the tools that don't fit.
- Inspectors have a more clearly defined boundary, with a revised Liquid Glass appearance on macOS 26 Tahoe and a separator line on macOS 27 Golden Gate.
- We modernized several aspects of the interface to follow the current operating system's styling.
- If you launch DEVONthink from its disk image, moving it to the Applications folder ejects the disk image automatically.
- The `open window for` AppleScript command accepts the `URL` and `referrer` parameters, similar to `open tab for`, and its `record` parameter is optional. Both commands also accept an HTML source to view, e.g., a dashboard created by AI, with a specified URL serving as the base URL of the source.
- The `resolve book metadata` AppleScript command and the Pro edition's MCP tool use the latest Open Library API.

- We updated the SkimNotes framework to version 1.6.3.
- Improved overall performance and reliability.

- **Pro** — DEVONthink loads Apple Mail mailboxes and accounts in the *Import > Email* sidebar 10 to 15 times faster and retrieves the complete structure, including unread counts, in the background instead of level by level. Messages load up to 30 times faster, so large mailboxes with thousands of emails load in minutes. The *Priority* filter is disabled while an Apple Mail mailbox is selected, as Apple Mail doesn't provide this information.
- **Pro** — The *Download Manager* has a modernized appearance.
- **Pro** — Opening the *Chat* inspector, or a window with the inspector visible, automatically loads the most recent chat for the current document or selection.
- **Pro** — The *AI > Chat* settings validate the API URL as you type, explain errors below the field, and don't save incomplete addresses.
- **Pro** — Changing the server URL of OpenAI (Compatible) providers refreshes the model capabilities instead of reusing results from the previous server. Capability checks are also more robust and ignore temporary failures.
- **Pro** — Leaving the *Keyword* field of a skill unchanged in the *AI > Library* settings no longer saves and re-syncs the skill.
- **Pro** — Checking for installed command-line clients, e.g., Claude Code, in the *AI > MCP* settings stops after a few seconds instead of waiting indefinitely.
- **Pro** — DEVONthink creates its folder in iCloud Drive only when you work with a skill script, e.g., saving or importing one, and doesn't recreate the folder on launch if you delete it.
- **Pro** — The *Chat - Query* and *Chat - Continue if* smart actions skip the subsequent actions when an error occurs.
- **Pro** — The `extract_record_content` MCP tool resumes where the previous call stopped when extracting PDF documents that exceed the time limit, so very long documents can complete over multiple calls.
- **Pro** — The `transcribe record` AppleScript command and `transcribe_record` MCP tool support PDF documents with an unusable text layer.
- **Pro** — Chats using tools reuse Anthropic's prompt cache over the whole sequence of tool calls, reducing the cost of long conversations.
- **Pro** — Chats with Claude Sonnet, Opus, and Fable show the model's own progress notes between tool steps, e.g., what it just found and what it intends to do next. Fable also requests independent items in one turn instead of one per turn, e.g., when creating multiple documents, making long conversations using tools faster and cheaper.
- **Pro** — We updated Claude Sonnet and Opus to version 5.5 and Fable to version 5.1, via Anthropic and OpenRouter.
- **Pro** — We updated GPT 5.6 Sol and Luna to version 6, via OpenAI and OpenRouter. Both are more affordable than their predecessors.

- **Pro** — GPT 6 Astra replaces OpenAI's GPT 5.5 (Pro), with a context window of 1,050,000 tokens and a knowledge cutoff of April 2026.
- **Pro** — We updated Gemini Flash to version 3.8, via Google and OpenRouter.
- **Pro** — Image generation and editing via OpenAI use GPT-Image-2.5 at the price of GPT-Image-2, with faster generation and more precise adherence to editing instructions. The *AI > Mixture of Agents - Images* template can also use this model.
- **Pro** — The script assistant supports the latest models, including Muse Spark 1.3 via OpenRouter.
- **Pro** — Reasoning models in Ollama (0.34.3 or later) think at the depth reported for the model. The *Usage* popup in the *AI* settings controls the depth, where *Auto* uses medium reasoning and *Best* the deepest level. Vision-capable models in Ollama can also receive images from tool call results, e.g., screen captures, so they can use MCP tools and skills if their context window is at least 65,536 tokens. Currently, Gemma 4, Qwen 3.x, and Muse Glimmer are supported.
- **Pro** — LM Studio (0.4.23 or later) supports vision tool call results, e.g., screen captures. Currently, Gemma 4, Qwen 3.x, and Muse Glimmer are supported, and these models can also use MCP tools and skills if their context window is at least 65,536 tokens.

- **Server** — The web server processes requests asynchronously, so slow tasks, e.g., downloading huge files, no longer stall the application or block other connections.
- **Server** — Downloading documents and groups from the *web interface* requires only minimal resources.

- **Sync** — Synchronization no longer reindexes, rewrites, or reloads documents whose received contents are identical to the local copies.

- Scrolling could crash DEVONthink on macOS 26 Tahoe and later, especially when scrolling quickly beyond the end of the content. Fixed.
- Editing a document during synchronization could lose text entered after synchronization began. Fixed.
- Reloading a Markdown, HTML, or web archive document could restore the text cursor and scroll position to their locations from the last save. Fixed.
- Embedded YouTube videos in Markdown and HTML-based documents wouldn't play, as YouTube requires embedded players to identify the app via the HTTP referrer. Fixed.
- Editing a syntax-colorized Markdown document consisting mostly of one deeply nested list could make the view jump on every keystroke. Fixed.
- When using macOS' dark mode with DEVONthink's *General > Appearance > Use dark background for documents* setting disabled, the text cursor in Markdown documents was invisible with the *Default* *color theme* chosen. Fixed.
- Pressing ↩ in WYSIWYG Markdown left blockquotes and callouts rendered at the incorrect height until the document was scrolled or reformatted, inserted a list marker into fenced code blocks inside lists, and appeared to create a multi-line table cell instead of a new row. Fixed.

- When composing with right-to-left text, pressing ↩ in a list or at the end of the text started the next paragraph in left-to-right text direction. Fixed.
- Text copied from WYSIWYG Markdown and pasted into other applications excluded hyphens and pipes, breaking tables and horizontal rules. Fixed.
- The column widths in WYSIWYG Markdown tables were poorly distributed. Fixed.
- Formatting, e.g., bold or italic, applied to a selection spanning several cells of a Markdown table gathered the text of all selected cells into the first cell, discarding the other cells, instead of formatting each cell separately. Fixed.
- Formatting text in a completely selected cell of a Markdown WYSIWYG table merged it with the following cell. Fixed.
- Text typed into a WYSIWYG Markdown table's header cell lost the bold header formatting after the first character, and italic text in the header row was not in bold type. Fixed.
- Pasting text into a Markdown document via *Edit > Paste and Match Style* kept the default font when pasted into a section heading or other styled line. This also affected other plain-text insertions such as drag-and-drop. Fixed.
- The *Edit > Undo* command in the WYSIWYG editor could sometimes incorrectly restore old formatting or do nothing at all. Fixed.
- Certain punctuation in a Markdown document, e.g., in `C++`, could be misinterpreted as formatting characters and inhibit other formatting, and three or more consecutive delimiters, e.g., `+++text+++`, produced incorrect HTML code. Fixed.
- A backslash after formatting characters or before a line break in Markdown could break the formatting or ignore the line break in Markdown captures and conversions. For example, a clutter-free capture of the text `**HOMETOWN\**` would be treated as incomplete formatting. Fixed.
- Saving edits to Markdown documents rewrote CriticMarkup insertion, deletion, and highlight blocks as ordinary underline, strikethrough, and highlights. Fixed.
- Escaped square brackets in Markdown documents could render as a LaTeX formula in previews and syntax colorization. Fixed.
- Images in Markdown documents using absolute links, e.g., `/Assets/frog.jpg`, were not displayed in WYSIWYG mode. Fixed.
- A WYSIWYG Markdown document containing images couldn't be scrolled to the end until the window was resized. Fixed.
- MultiMarkdown 6 abbreviation definitions, such as `[>MMD]: MultiMarkdown`, were interpreted as link definitions, turning abbreviation references into broken links to the first word of the expansion. Also, definitions indented by one to three spaces were not recognized at all, and saving the document duplicated their marker. Fixed.
- Markdown code blocks specifying their language in an attribute list, such as `{.python #cell}` or `{r, echo=FALSE}`, lacked syntax highlighting in previews and exports. Raw blocks such as `{=html}` were also incorrectly assigned a language. Fixed.

- Images stored in the database or inside a `.textbundle` file were missing when exporting Markdown as LaTeX and PDF (LaTeX) documents. Fixed.
- Editing inside a fenced code block of a Markdown document with syntax highlighting redrew the whole block on every keystroke, which could make the insertion point jump while deleting text in long blocks (e.g. JSON). Fixed.
- Converting a web page to Markdown dropped text that stood directly inside a block quote next to a label or other formatting, e.g. the abstract on an arXiv page came out as just `> Abstract:`. Fixed.
- Annotations without a color of their own displayed as yellow when splitting, merging, or saving PDFs on macOS 27 Golden Gate. Fixed.
- PDF notes and other annotations added or changed after opening a PDF document were damaged when saving on macOS 27 Golden Gate. Fixed.
- Text and buttons of a PDF Note annotation ignored the note's color, making them unreadable on macOS 27 Golden Gate. Fixed.
- Text-based annotations rendered pixelated and caused a slowdown and file growth when saving on macOS 27 Golden Gate. Fixed.
- PDF text annotations could cause a random crash while being drawn on macOS 27 and could lose their text in the saved document. Fixed.
- macOS' annotation format picker at the top of a PDF annotation's context menu didn't work on macOS 27 Golden Gate. Fixed.
- Changes made to the table of contents of PDF documents weren't saved on macOS 27 Golden Gate. Fixed.
- If a PDF document was closed or replaced, e.g., via sync or an automation, while the mouse button was pressed, DEVONthink could crash. Fixed.
- Thumbnails of PDF documents added by other applications, e.g., DEVONagent or the MCP server, were not always opaque. Fixed.
- When converting web pages to Markdown, the links of citation markers could be lost, words merged, tables broken, and stray characters left behind. Fixed.
- Dates in RSS articles were sometimes parsed incorrectly. Fixed.
- Clipping or downloading web pages could stall until DEVONthink was relaunched, leaving only a bookmark. Fixed.
- Clutter-free clipping of Substack and similar sites could omit an article's title block or certain leading images. Fixed.
- Images in clutter-free clipped pages could appear distorted. Fixed.
- Web pages with the article wrapped in a paywalled container could only be clutter-free clipped as the headline and teaser links. Fixed.
- Web pages having containers with names coincidentally matching advertising-related terms, e.g., "thread-items", could be ignored when clipping. Fixed.

- Clutter-free clipping and the *Reader* view dropped section headings that were wrapped in anchor links. Fixed.
- Labels used for screen readers incorrectly appeared above the headline in clutter-free captures. Fixed.
- The *Reader* view displayed the author and date above the headline instead of below it and could show cookie consent panels instead of the article. Fixed.
- The user agent of web views didn't work with Cloudflare, and images from sites protected by Cloudflare did not load in the *Reader* view. Fixed.
- No divider separated the item list and view/edit pane in widescreen mode on macOS 15 and later. Fixed.
- In the icon view with details, labeled items in the trash weren't struck through, and labeled bookmarks weren't underlined. Fixed.
- Detached popovers could not always be moved or resized correctly on macOS 27 Golden Gate. Fixed.
- Clicking and holding an item in the *Navigation* or *Editing* bars did not open its menu on macOS 26.7 Tahoe and later. Fixed.
- Clicking the empty area next to the *Navigation* or *Editing* bars could trigger a hidden tool. Fixed.
- In case of a visible toolbar search without results, several user interface items, e.g., *File > Update (Indexed) Items*, could be disabled instead of using the sidebar selection to determine their status. Fixed.
- Opening a *Reading List* item in a new window always opened it in a background window. Fixed.
- When DEVONthink launched or a workspace was restored, the *Info > Generic* inspector opened instead of restoring the last used inspector. Fixed.
- Markdown annotations in the *Info > Annotations & Reminders* inspector and the *Take Note* view of the *Sorter* didn't always work well in dark mode. Fixed.
- The *Document > Links* and *Mentions* inspectors exhibited visual glitches. Fixed.
- Validation of the *File > Download Pending Files* command was slow when many Markdown documents were selected. Fixed.
- For Markdown documents using right-to-left text, the *Format > Alignment > Writing Direction* menu incorrectly reported *Standard*. Fixed.
- The *Navigation* and *Voice Note* tabs of the *Sorter* were incorrectly sized when opened on an external monitor. Fixed.
- The *Sorter* could close after creating a group using the *Location* popup menu on macOS 27 Golden Gate. Fixed.
- Shortcut recorder fields, e.g., in the *Sorter* settings, could display incorrectly after switching between light and dark appearances. Fixed.
- Example item links, e.g., `x-devonthink-item://uuid`, in documents were indexed as outgoing item links. Fixed.

- After downloading DEVONthink via Safari, the application could prompt to be moved to the Applications folder even if it was already installed there. Fixed.
- Opening HFS+ encrypted or revision-safe databases on macOS 27 Golden Gate asked for the password a second time after canceling. Fixed.

- **Pro** — In the *AI > Library* settings, editing a skill's attached JavaScript for Automation (JXA) script opened it in the default viewer instead of the default editor. Fixed.
- **Pro** — Importing two or more `.dtSkill` files in the Finder by double-clicking them could crash DEVONthink if the *AI* settings were open. Fixed.
- **Pro** — OCR could fail for PNG screenshots created on macOS 27 Golden Gate. Fixed.
- **Pro** — Applying OCR or transcribing PDF documents containing pages with unreadable content could cause exceptions. Fixed.
- **Pro** — Tool calls for creating and moving items could incorrectly report a database as read-only when neither MCP tools nor skills were used. Fixed.
- **Pro** — The `extract_record_visuals` MCP tool reported an error instead of an empty result when no existing page was matched. Fixed.
- **Pro** — The `extract_record_content` MCP tool could stop processing long PDF documents, omitting pages and preventing content on them from being found. Its `pages` argument could return the complete document, and its `query` argument was ignored for plain text, Markdown, and bookmarks, with non-matching filters returning the entire document instead of an empty result. Fixed.
- **Pro** — The `is_running` MCP tool claimed that DEVONthink was not running whenever the server itself was started outside the current session. Fixed.
- **Pro** — Failed HTTP requests of DEVONthink's MCP server incorrectly returned an "OK" status instead of the error. Fixed.
- **Pro** — The AppleScript command `get chat response for message... as "JSON"` could fail with OpenAI's Responses API if the prompt didn't mention JSON. Fixed.
- **Pro** — Estimated chat costs for OpenAI's GPT 5.6 and GPT 6 models omitted the surcharge for writing entries to the prompt cache. Fixed.
- **Pro** — Models served by OpenAI-compatible servers that strictly validate tool definitions, e.g., Cerebras or xAI, had tool calling disabled. Fixed.
- **Pro** — Requests denied by Claude's safety classifiers returned an empty response instead of the error. Fixed.
- **Pro** — The vision quality from the *AI > Chat > Usage* popup didn't work with Gemini 3 models. Fixed.
- **Pro** — Gemini's estimated costs were higher than the actual cost. Fixed.

- **Server** — The web server could crash if it received a request at the same time the connection closed. Fixed.

- **Server** — Documents with certain characters, such as typographer's quotes, emoji, or Asian characters, downloaded from the web interface with a broken filename. Fixed.
- **Server** — Logging into the web interface via HTTP authentication failed if the web server's name contained typographer's quotes. Fixed.
- **Server** — Stalled server connections didn't always close within two minutes of inactivity. Fixed.

- **Pro** — We removed dedicated support for outdated open-source models, e.g., Llama 3 and 4, Phi 4, and Mistral Nemo.
- **Pro** — We removed Meta's Muse Spark contributor model, GPT 5.3 Codex, and DeepSeek V4 Pro from OpenRouter.
- **Pro** — We replaced several OpenRouter models: Muse Spark 1.2 with Muse Spark 1.3, Qwen 3.7 Flash and Plus with Qwen 3.8, DeepSeek V4 Flash 0731 with DeepSeek V4.1 Flash, Xiaomi MiMo 2.5 and MiMo 2.5 Pro with MiMo 2.6, SpaceXAI Grok 4.6 with Grok 4.7, and Z.ai GLM 5 Turbo and GLM 5V Turbo with GLM 5.3.

VERSION 4.4 TYCHO

DEVONthink 4.4 turns the AI assistant into a true co-worker. A new AI library lets you create, store, and sync roles, prompts, and skills that can trigger your smart rules, batch processes, and scripts on demand. In addition, the Chat assistant can use DEVONthink's MCP tools directly and improved prompt caching makes multi-step tasks noticeably faster and much cheaper. Of course, we have also updated to the latest models of all major AI providers.

Markdown takes the second spotlight with WYSIWYG support for live tables and MathJax equations, a new syntax colorizer, custom color themes, and direct export to LaTeX or typesetting as PDF via pdflatex. Web clipping is also faster and more accurate, using a new, local Markdownifier and Readability engine. The new Reader view lets you read web content distraction-free.

Finally, encrypted and revision-safe databases use modern APFS images on macOS 26.0 Tahoe and later, and the help viewer's chat assistant is available for free in all editions.

> Note: We named this release after one the Moon's most prominent craters, Tycho, itself named after the Danish astronomer Tycho Brahe (1546–1601). Working without a telescope, Brahe compiled the most precise astronomical observations of his era — a dataset so exact that his assistant Johannes Kepler later used it to derive the laws of planetary motion. His work is a reminder that rigorous record-keeping is itself a form of discovery, one whose value can outlast the observer who created it.

- DEVONthink adds two new export commands to the *File > Export* menu for exporting Markdown documents to native LaTeX or PDF. LaTeX export resolves WikiLinks and transclusions, carries over title, author, and date metadata, and copies referenced images

alongside the exported document; PDF export requires a local installation of MacTeX or the smaller BasicTeX, and merges multiple selected Markdown documents into a single PDF.

- DEVONthink adds a new *Reader* view that displays a clean, sanitized read of web content like bookmarks, HTML documents, and web archives that contain a detectable article. Open it via *View > Document Display > Reader*, the Reader button in the *Navigation Bar*, or ^⌘A, then capture the page via the *Tools > Capture* menu, a context-menu command, or by printing.
- DEVONthink uses a new, local engine for converting web content to Markdown. Beyond speed and native compatibility, it also improves navigation, advertising, and boilerplate removal; metadata, embedded media, and paywall detection; forum thread and authorship detection; callouts and footnotes; and MathML-to-LaTeX conversion.
- DEVONthink adds a *Color Theme* popup to the *Files > Markdown* settings, letting you choose a theme for both the source and preview modes of Markdown documents. The *Automatic* option uses the Markdown font and plain text colors chosen in the *Editing > Format* settings.
- DEVONthink adds a `Date Attributes Modified` criterion to the *predicate editor* for smart groups, smart rules, and advanced toolbar searches. The search prefix is `attributesModified` or `attributesModification` and honors the same date-based prefix operators as other date criteria; in the higher editions, the MCP server and Chat assistant support this property too.
- A new read-only AppleScript property, `has text layer`, lets you quickly identify PDF documents that need OCR.
- DEVONthink brings a new `mark record` AppleScript command that adds annotations (highlights, underlines, and strikethroughs) to found text within PDFs with text layer, rich text, Markdown, and HTML-based documents like formatted notes. The MCP server supports this too.
- DEVONthink adds new application scripts for use with MailMaven: `Add attachments to DEVONthink`, `Add message(s) to DEVONthink`, and `Add message(s) & attachments to DEVONthink`. Importing attachments requires full disk access.

- **Pro** — DEVONthink adds an extensive new *AI > Library* settings pane: a repository of roles, prompts, and skills you can use in the *Chat* assistant and in smart actions. It ships with ten built-in, modifiable functions, each with its own settings and a keyword (slash command) for quick access, and you can create your own manually or with AI assistance. Skills can call scripts (including AI-scripted ones) and trigger existing automations like smart rules, batch processing, and *Script with Input/Output* actions. Your library syncs via iCloud across your Macs and can also be exported as a package to share. Skills require AI models capable of using MCP tools.
- **Pro** — DEVONthink adds an *Allow MCP tools* option to the *AI > Chat* settings and the *Chat* assistant, giving the AI access to DEVONthink's MCP tools while you chat. The tools honor your other assistant settings and require a model that supports tool calls with a context window of at least 64,000 tokens (currently ChatGPT, Claude, Mistral, Gemini, and Qwen 3.x

and Muse Spark via OpenRouter). DEVONthink caches requests to minimize token spending, though MCP calls still take more time and tokens than a plain chat.

- **Pro** — DEVONthink adds a *Copy JSON* button to the *AI > MCP > Install Connectors* settings to copy the `stdio` configuration for use in third-party applications, and a similar *Copy Server JSON Config* command in the MCP Menu Extra for the HTTP access configuration.
- **Pro** — Tooling-capable AI models can retrieve a PDF's page count in the *Chat* assistant, and the AI tool that extracts record contents accepts a new `pages` parameter to target specific pages or a page range. Available to the MCP server, the *Chat* assistant, AI smart actions, and the `get chat response for message` AppleScript command, this lets you process large PDF documents in smaller chunks and stay under the context window while reducing cost and processing time.
- **Pro** — A new AppleScript command, `perform chat skill`, runs an existing skill and returns its results — handy for running skills on a schedule via smart rules. Skills that require confirmation can't be run via scripting.
- **Pro** — A new tool retrieves a PDF document's table of contents in the Chat assistant, the MCP server, smart actions, and the `get chat response for message` AppleScript command.
- **Pro** — DEVONthink supports Meta's Muse Spark 1.2 via OpenRouter.
- **Pro** — DEVONthink supports macOS 27's `fm serve` server as an OpenAI-compatible provider.
- **Pro** — DEVONthink supports Google's Nano Banana 2 Lite for fast image generation, though HD quality isn't available.
- **Pro** — DEVONthink adds prompt caching for Mistral AI and Claude models served via OpenRouter.

- We significantly improved the appearance and reliability of the DEVONthink Markdown parser and renderer. Beyond the new color theme option, the WYSIWYG source now more closely matches the rendered preview, and the WYSIWYG view supports live-edited tables and MathJax equations, not just images and links. DEVONthink also natively renders GitHub-style emojis.
- You can now copy multiple selected ranges in the Markdown WYSIWYG editor.
- Several inspectors use the new parser for consistency, including *Info pane > Properties*, *Content > Table of Contents*, *Document > Annotations*, *Attachments*, and *Links*.
- DEVONthink produces more naturally readable mathematical output when converting Markdown documents with equations to plain text.
- Markdown and HTML documents preview more responsively in *Side-by-Side* view.
- DEVONthink wraps long lines in code blocks within the Markdown preview and Reader view, instead of letting them run past the visible width of the pane.
- The default stylesheet set in the *Files > Markdown > Style Sheet* setting no longer overrides DEVONthink's internal stylesheet, retaining more of the built-in styling when you edit just a few CSS elements.

- DEVONthink clips web content directly from the loaded WYSIWYG page, more reliably stripping unwanted elements like cookie banners while retaining important elements such as images and scripts, including on sites like YouTube or X.
- When clipping, DEVONthink uses browser-supplied HTML (e.g. by bookmarklet, extension or via AppleScript) more reliably by keeping pages from refreshing or forwarding themselves.
- If you've viewed and logged into a paywalled or authenticated site in DEVONthink, the app can reuse the stored cookies when you clip from that site externally, e.g., via our browser extension, increasing the chance of a successful capture.
- DEVONthink better converts inline code in web content to Markdown.
- DEVONthink lets you toggle the *Clutter-free* layout when clipping web content as Markdown via the *Sorter* and the `create Markdown from` AppleScript command.
- When composing a Markdown note in the *Sorter*, DEVONthink imports images you drag and drop into it, if the *Files > Markdown > Import images to group* option is enabled.
- Text annotations added to rotated pages of PDF documents are horizontal now, following the current rotation of the page instead of its original orientation. Their default size, their automatic resizing to fit the text, and their resize handles follow the rotation too.
- In a sheet created with the *Tools > Metadata Overview* command, DEVONthink defines the *Item Link* column as a crosslink instead of a URL.
- You can select and copy content in cells within read-only sheets, e.g., locked or revision-proof databases.
- DEVONthink creates *encrypted and revision-proof databases* as APFS disk images on macOS Tahoe and later instead of using the older HFS+ format. Note that you cannot open databases using the new APFS encryption on older versions of macOS.
- DEVONthink unmounts encrypted and revision-proof databases more reliably.
- DEVONthink supports the matches (`:`) operator, with quoted or unquoted text, when searching custom metadata, e.g., `mdstatus:"To Do"`.
- Going to a page, line or row of a sheet no longer depends on the system's number formatting, both `1018`, `1 018`, and `1,018` work now.
- Multiple selected items with thumbnails display as a fanned stack in the view/edit pane.
- The *Info* filter supports filtering by *Date Attributes Modified*.
- We made many minor cosmetic tweaks and fixes to the interface, touching inspectors, the splash screen, the *License* panel, etc.
- The *Databases* Finder folder has a new icon on macOS Tahoe and later.
- We updated the layout of the *Help* viewer and the help pages, including a reordered sidebar.
- DEVONthink makes the *Help* assistant available for free in all editions and during the trial period. We are providing this functionality as a courtesy, but note that you can no longer change its AI provider.
- DEVONthink retrieves ISBN numbers more reliably via AppleScript's `international standard book number` property and smart action placeholders.

- We renamed the AppleScript property `attributes change date` to `attributes modification date`, keeping the old name as a synonym for compatibility.
- The `replicate record to` AppleScript command supports replicating to an RSS feed.
- The Export > Listing script runs at least six times faster.
- We improved language detection for documents, making it faster and more accurate.
- DEVONthink processes and indexes HTML content more effectively, removing unnecessary information to improve searches and conversions.
- DEVONthink clears smart group and smart rule caches immediately when you close a database.

- **Pro** — Imprinted documents achieve better compression when saved.
- **Pro** — The Chat assistant and MCP server better handle Markdown documents with empty sections.
- **Pro** — You can file documents and groups created via the Chat assistant by providing a name or path.
- **Pro** — In the *AI > Chat* settings, DEVONthink updates per-model usage costs after each completed request using current rates, for more precise totals. Costs also reflect the discounted rates for cached data where applicable, and show an estimated percentage of cached input.
- **Pro** — All the AI functions, e.g., the Chat assistant, smart actions, scripting commands, AI popovers, etc., redact your name and phone number, and the phone numbers of your other contacts. The MCP server optionally does this as well.
- **Pro** — Better caching and response filtering reduce costs and increase accuracy in the Chat assistant, AI smart actions, and the `get chat response for message` AppleScript command.
- **Pro** — We improved error logging and handling for the *Chat* and *Help* assistants.
- **Pro** — Local MCP server connections no longer require a TLS certificate, though one is still recommended.
- **Pro** — In the *AI > MCP* settings, *Install Connectors > Codex Desktop & CLI* supports the latest ChatGPT application.
- **Pro** — The MCP server can get color label names, more flexibly access the *Global Inbox*, and better handle UUIDs.
- **Pro** — DEVONthink's MCP server supports the latest version of MCP as well as previous versions. This improves compliance and reliability in connection handling and also prepares the server component for future MCP-compatible applications.
- **Pro** — All MCP tools declare the scope of their actions via annotations. These denote whether an action can access the internet, modify or overwrite data, or is read-only. AI clients that support these annotations, e.g., Claude Code, use them to determine if user confirmation is required.

- **Pro** — We updated Claude Opus and Sonnet to version 5, with a knowledge cutoff of 2026-07-01; Sonnet has a context window of one million tokens and 128,000 output tokens. Pricing hasn't changed, though the new tokenizer uses up to 30% more tokens per request. Claude's prompt caching is much more efficient, making multi-step tasks noticeably faster and reducing token costs.
- **Pro** — DEVONthink supports the latest OpenAI models, GPT 5.6 Sol, Terra, and Luna, each with a one-million-token context window, 128,000 output tokens, and knowledge current to February 16, 2026. The *Script* assistant uses 5.6 Sol.
- **Pro** — We updated Gemini Flash to 3.7 and Flash Lite to 3.1, both accessible via API and OpenRouter, with knowledge current to 2026-07-01.
- **Pro** — DEVONthink uses the OpenAI responses API and Google's interactions API, supporting the latest models and features, including image tool call results.
- **Pro** — DEVONthink offers improved support for running GLM 5.x and muse-glimmer models locally.
- **Pro** — DEVONthink supports context windows of up to one million tokens for Ollama, LM Studio, and OpenAI-compatible providers, up from 128,000.
- **Pro** — Local AI, Ollama, OpenAI-compatible, and Mistral models support longer tool call cycles.
- **Pro** — DEVONthink offers OpenAI's GPT 5.5 (Pro) via the API.
- The *Script* assistant supports GPT 5.3 Codex. We updated the OpenRouter models used by the assistant: Claude Opus and Sonnet 5, Gemini 3.7 Flash, Grok 4.5, and Kimi 2.7 Code.
- **Pro** — MCP tools and AI skills support Qwen 3.x and Muse Spark models via OpenRouter.
- **Pro** — Transcriptions without timestamps done via OpenAI use GPT-Transcribe instead of GPT-4o.
- **Pro** — The *Script* assistant and *AI skills* produce better AI-generated scripts.

- Selecting text in the Chat assistant could sometimes crash on macOS 27 Golden Gate. Fixed.
- Viewing or editing Markdown documents containing lists could sometimes crash. Fixed.
- Markdown documents converted to HTML incorrectly contained a second title header. Fixed.
- MathJax in Markdown didn't always render properly. Fixed.
- A Markdown document with unclosed YAML front matter at the top of the document displayed and converted as if it had no content. Front matter now ends at the first blank line, similar to MultiMarkdown. Fixed.
- In Markdown, bold or italic text followed by a superscript character wasn't formatted correctly. Fixed.
- Line items spanning multiple lines in Markdown documents' to-do lists incorrectly showed the text on the line under the checkbox. Fixed.
- With *Syntax highlighting* enabled in the *Files > Markdown* settings, callout titles in the Markdown source didn't display in bold and tinted colors like in the rendered view. Fixed.
- Saving edits to Markdown and HTML documents in side-by-side view forced a full reload of the preview, causing flickering and rescrolling. Fixed.

- When text was selected in the Markdown source while using the *Side-by-Side* view, the *Edit > Set Name As* command was disabled. Fixed.
- The *Smart quotes and dashes* option in the *Files > Markdown* settings got disabled after restarting DEVONthink. Fixed.
- Saving edits to formatted notes could reprocess styles and images, leading to image scaling issues. Fixed.
- Clipping HTML pages with malformed markup, legacy multimedia content, or self-closing tags could cause the content to be lost. Fixed.
- Clipping to formatted notes could cause random issues. Fixed.
- PDF annotations could get lost or damaged on macOS 27 Golden Gate when editing them or when pages were copied, e.g., by splitting, merging, or converting documents. Fixed.
- Searches beginning with `NOT` incorrectly counted the first term twice, inflating the item's ranking. Fixed.
- Searches using the `NOT AFTER` operator didn't match documents whose search term was the last word of the text. Fixed.
- Exact phrase searches, e.g., `"a b c"`, could return similar but non-matching documents, e.g., one containing `"a b b c"`. Also, if a document contained repeated words, e.g., `the cat the cat the dog`, a quoted search for `"the cat the dog"` didn't match that document. Fixed.
- Sorting very large groups or smart groups by URL could sometimes cause a crash in recent versions of macOS. Fixed.
- Windows opened via the context menu in the *Navigate* sidebar or *item list* would open in the background on macOS 26 Tahoe and later. Fixed.
- The toolbar search field in the *Help* viewer wasn't vertically centered on macOS 27 Golden Gate. Fixed.
- The *Navigation Bar* was sized incorrectly when previewing Markdown documents, HTML pages, or web archives on macOS 27 Golden Gate. Fixed.
- When inserting a back link or quote in an *annotation file*, Asian characters in Markdown section names were converted to Latin. Fixed.
- Documents with text containing the name or alias of another document weren't shown in the *Document > Mentions* inspector if the first word of the name was repeated, e.g., `skill skill prompt` didn't match a document named `skill prompt`. Fixed.
- When the maximum number of versions per document was reached, the next save would incorrectly remove the most recent version instead of the oldest. Fixed.
- You couldn't drag and drop multiple emails from Apple Mail into DEVONthink on macOS 27 Golden Gate. Fixed.
- When trashing a replicant matched by a local smart group, the menu and context menu command was "Move to Trash" instead of *Move All Replicants to Trash*. Fixed.
- The *Scan Name* and *Scan Text* smart actions could cause an exception when processing a document with no text, e.g., a bookmark. Fixed.

- Scheduled smart rules that hadn't run due to having no matched items could cause high CPU usage. Fixed.
- An alias or symbolic link in the *Scripts* or *Templates* menus that pointed to an enclosing folder could make DEVONthink freeze and finally crash. Fixed.

- **Pro** — When browsing certain sites, too many items were added to the *Download Manager*. Fixed.
- **Pro** — If the MCP server failed to launch on startup, the alert always showed the default `8420` port instead of the one configured in the *MCP* settings. Fixed.
- **Pro** — Summarizing or tagging large documents with Apple Intelligence could produce frequent "Exceeded model context window size" errors. Fixed.
- **Pro** — Gemini didn't work reliably via OpenRouter. Fixed.

- **Server** — In the web interface, dates changed in the *Data* inspector were not saved. Fixed.
- **Server** — Some Markdown documents in search results couldn't be edited. Fixed.
- **Server** — The *Generic* and *Data* inspectors were disabled when a search result in the web interface was selected. Fixed.

- We removed MultiMarkdown support and its renderer popup from the *Files > Markdown* settings.
- We removed the *Clutter-free layout* option from the *Tools > Capture* menu, as it's no longer needed with in-application clipping.
- We removed the obsolete iData file plugin (e.g., `.idata`, `.id3`).
- We removed a workaround of the *List* and *Icons* views in widescreen preview mode on the latest versions of macOS 26.x so that the scrollbar is not always visible anymore but honors the system's setting.

- **Pro** — We removed the outdated O3 and O4 Mini models from OpenAI access and OpenRouter.
- **Pro** — We removed Magistral models from Mistral and OpenRouter access.
- **Pro** — We removed Meta Llama 4 Maverick and Scout, and DeepSeek R1, from OpenRouter.
- **Pro** — We replaced several OpenRouter models: GLM 5.1 with GLM 5.3, DeepSeek V4 Flash 0423 with DeepSeek V4 Flash 0731, DeepSeek V4 Pro with DeepSeek V4 Pro 0813, Qwen 3.6:27B with Qwen 3.8:27B, Qwen 3.6 Flash with Qwen 3.7 Flash, Qwen 3.7 Max with Qwen 3.8 Max, and Grok 4.3 with Grok 4.6.
- **Pro** — We removed the *Role* popup from the *AI Chat* settings; specify roles in context instead, e.g., via a skill.

VERSION 4.3.2

This maintenance release adds support for Anthropic's latest frontier model, Claude Fable 5, as well as image diffusion models via Ollama. We optimized the search tool in the MCP server and added a built-in connector for LM Studio to access it. Additionally, DEVONthink can redact many national identification numbers before AI use. For research automation, four new AppleScript commands let you locate and apply bibliographic metadata, and in the web interface, you can now print PDF documents you're viewing. We also fixed compatibility with macOS 27 Golden Gate Developer Beta.

- Added four new research-based AppleScript commands: `resolve DOI metadata`, `resolve book metadata`, `download PDF from DOI`, and `search CrossRef`. These complement the functions of the MCP server in the higher editions of DEVONthink.
- Added AppleScript synonyms: `DOI` for `digital object identifier` and `ISBN` for `international standard book number`.

- **Pro** — Added support for Claude Fable 5, via Anthropic and OpenRouter. Be aware that this is a much more expensive model to use. Also note that at the time of the release of this version, Anthropic has suspended access to Claude Fable 5 based on a US government directive. It may or may not become available in the future.
- **Pro** — Added *LM Studio* to the *AI > MCP > Install Connectors* settings.

- Improved the overall reliability of the DEVONthink Markdown parser.

- **Pro** — Updated the *AI > Mixture of Agents - Images* template.
- **Pro** — DEVONthink redacts regional identification numbers, e.g., European identifiers, before passing them to external AI via the *Chat* inspector, AI-related smart actions and scripts, the *Summarize* and *Transform* popovers, and optionally the MCP server.
- **Pro** — The *Chat* assistant and smart actions no longer redact phone numbers, consistent with the MCP server's behavior.
- **Pro** — You can manually edit the MCP server's `config.json` file and retain your changes, unless you toggle the *Redact sensitive content* option in *AI > MCP* settings.
- **Pro** — In the *Generate Image* window or *AI > Image Generation* settings, you can now choose image diffusion models provided by Ollama, e.g., z-image-turbo. These models are also available via the `model` parameter of the `download image for prompt` AppleScript command and the Mixture of Agents - Images template.
- **Pro** — Added optional `from_uuid` parameter to the `move_record` MCP tool to move only replicants from the specified source group. Ignored in case of cross-database moves.
- **Pro** — Optimized and refined the search tool and the overall performance and reliability of the *MCP server*.
- **Pro** — The default context window for LM Studio is now 8,192 tokens.
- **Pro** — Added support for Nvidia Nemotron 3 Super/Ultra and MiniMax M3 to OpenRouter.

- **Pro** — More reliable `get chat response for message … record … as "JSON"` AppleScript command.
- **Pro** — The `Download Bibliographic Metadata` smart rule now uses the new AppleScript commands.

- **Server** — In the *web interface*, you can now print PDF documents for which you have download rights.

- DEVONthink crashed on launch on the macOS 27 Golden Gate Developer Beta. Fixed.
- In Markdown documents, bold or italic formatting applied to selected text already containing formatting didn't properly apply to the whole selection. Fixed.
- Double-clicking a PDF document in the *Reading List* didn't always open the document on the correct page. Fixed.
- Viewing or annotating a PDF document on the macOS 27 Golden Gate Developer Beta caused exceptions. Fixed.
- The see-also score for images was usually too high, e.g., for scanned documents. Fixed.
- Detached popovers weren't always restored properly in the latest versions of macOS. Fixed.
- The DEVONthink widget extension and the MCP server (in the higher editions) contained a file that could cause Time Machine to report an error. Fixed.
- The AppleScript `search` command could return results not sorted by score. Fixed.
- Window resizing was slow after clicking the *Update Now* button which is shown if the license is only valid for updates for less than 30 days. Also, after extending the application license, the *Update Now* notification could incorrectly continue to appear. Fixed.

- **Pro** — Removed the `prompt strength` parameter from the `download image for prompt` AppleScript command.
- **Pro** — Removed the outdated Stable Diffusion 3.5 models as well as the deprecated GPT-Image-1-Mini model.

VERSION 4.3.1

This maintenance release further refines the new DEVONthink Markdown parser with options like better image styling and captions, improved inline footnotes, and some fixes. This release also improves the MCP server, including safer handling of custom metadata, setting item aliases, opening documents externally, and using OpenLibrary as a fallback for Google Books. Additionally, we updated some image-generation AI models and now support Claude Opus 4.8.

- Support for headerless tables in DEVONthink Markdown.

- **Pro** — A new optional parameter for the `open_record` MCP tool allows you to open documents in an external application. This is disabled by default.

- **Pro** — An `exclude from chat` AppleScript property that we added to the `database` class lets you explicitly hide databases from AI access.

- DEVONthink's Markdown parser better supports styling directly in image links, including CSS units for scaling.
- DEVONthink 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)`.
- Inline footnotes in DEVONthink Markdown preserve embedded links.
- Anchors in Markdown section headings are compatible with the MultiMarkdown implementation.
- Improved overall reliability of our Markdown parser and renderer.
- Updated Finder icons for all DEVONthink document types, e.g., `.dtBase2`, `.dtSmartRule`, etc., on macOS Tahoe.

- **Pro** — Updated *AI > Mixture of Agents - Images* template.
- **Pro** — You can now change an item's alias via MCP.
- **Pro** — Replicating items via MCP reports the destination of each item.
- **Pro** — The *Chat* assistant, the *Chat - Query* and *Chat - Continue if* smart actions, the `get chat response for message` and `display chat dialog` AppleScript commands, as well as the summarization and transformation chat popovers now also redact IBANs. The MCP server redacts IBANs if redaction is enabled.
- **Pro** — The MCP tool to resolve Google Books metadata now uses OpenLibrary as a fallback, as Google Books requires an API key to search.
- **Pro** — Boolean custom metadata is set more reliably via MCP.
- **Pro** — MCP tools in general are more reliable, including error responses and handling missing UUIDs for groups. We have improved the communication with the MCP server too.
- **Pro** — On macOS Tahoe, the Apple Speech Analyzer more reliably transcribes audio and video when an invalid language is specified via MCP or AppleScript.
- **Pro** — For the `download image for prompt` AppleScript command, we updated the name of some AI engines and also the description of some parameters. However, synonyms ensure older scripts are still compatible.
- **Pro** — We updated Claude Opus to version 4.8, via Anthropic and OpenRouter.
- **Pro** — We replaced GPT-Image-1.5 with GPT-Image-2. Note that "HD" quality produces larger images.
- **Pro** — Nano Banana 2 uses the commonly available version gemini-3.1-flash-image model.
- **Pro** — Editing images with Flux Pro or Max retains the original's image size, if possible.
- **Pro** — We updated the Recraft image-generation model, but note that it no longer supports styles.
- **Pro** — DEVONthink sanitizes Gemma 4 responses via Ollama.

- **Server** — Added localization to the *See Also & Classify* inspector in the *web interface*.

- The Markdown parser incorrectly detected an indented horizontal line with spaced characters, e.g., `* * *`, following a list in Markdown as a heading. Fixed.
- Callouts and blockquotes beginning with lines similar to MultiMarkdown metadata didn't parse and render correctly. Fixed.
- In Markdown documents, emboldened text following punctuation, e.g., `note:`, wasn't parsed properly by DEVONthink Markdown. Fixed.
- Markdown blockquotes separated by one empty line no longer merge into one quote. Fixed.
- The DEVONthink Markdown parser didn't allow CSS declarations containing spaces in YAML frontmatter. Fixed.
- Text in the toolbar search field of the *Help* viewer could overlap the clear button. Fixed.

- **Pro** — The *MCP server* couldn't be accessed during DEVONthink's trial period. Fixed.
- **Pro** — Looking up reminders via MCP could fail on items having no reminders. Fixed.
- **Pro** — Items with rich text custom metadata could cause an exception for the MCP server. Fixed.
- **Pro** — If an invalid value was given while modifying custom metadata via MCP, it could remove data from other fields. Fixed.
- **Pro** — Downloading a PDF based on its DOI via MCP could fail even if the PDF was publicly accessible. Fixed.
- **Pro** — Tagging bookmarks with an invalid URL or while being offline could crash when done via Apple's Foundation model on macOS Tahoe. Fixed.
- **Pro** — On rare occasion, web searching with AI could cause a crash in the *Chat* assistant, smart chat actions, or the `get chat response for message` AppleScript command. Fixed.
- **Pro** — Google's Nano Banana 2 and Pro could fail due to being asked for the wrong type of output. Fixed.
- **Pro** — Editing an image with Flux Pro or Max could crash if the original image's size was too large. Fixed.

- **Server** — Long Bonjour names specified in the *Server > General* settings could prohibit the web server from starting. Fixed.
- **Server** — PDF documents with emojis or an em-dash in their name downloaded in the *web interface* had an incorrect filename and a `.txt` extension. Fixed.

- **Sync** — Bonjour syncs could cause exceptions on rare occasion. Fixed.

- **Pro** — To reduce time and token costs of the chat assistant, we removed *Allow image generation* from the *AI > Chat > Assistant* settings. AI-generated images can still be made via the *Generate Image* window.

- **Pro** — We removed the *Style* setting from the *AI > Image Generation* settings and *Generate Image* window. We also removed the `style` parameter from the `download image for prompt` AppleScript command.
- **Pro** — Google soon discontinues the Imagen models so we removed them from image generation.

VERSION 4.3 HERSCHEL

DEVONthink 4.3 Herschel introduces our MCP server: A safe, private bridge that lets Claude, Cowork, Codex, and other AI clients work directly with your databases. No scripting or third-party tools required. On macOS Tahoe, we now support Apple Intelligence for light tasks and Apple's faster SpeechAnalyzer for transcription. Other AI improvements include a leaner search assistant, a dedicated tagging model, and web search via ollama.com.

A new Markdown parser and renderer replaces MultiMarkdown 6. It adds callouts, citations, and better compatibility with AI output. Desktop widgets bring the reading list, favorites, and workspaces to macOS Sequoia and later. For DEVONthink Server users, the web interface gains classification, context menu commands for moving, duplicating, and replicating items, and a dialog for opening item links. It also features a much better PDF viewer. As always, reliability and performance continue to improve.

> Note: We name this release after the periodic comet 35P/Herschel–Rigollet, discovered in 1788 by Caroline Lucretia Herschel (1750–1848). Caroline was the sister of the famous astronomer William Herschel and made significant contributions to astronomy in her own right. She discovered eight comets and numerous nebulae and star clusters, and compiled an influential catalogue of deep-sky objects. Caroline Herschel was the first known professional female astronomer, became the first woman to receive a salary as a professional astronomer, and received the Gold Medal of the Royal Astronomical Society.

- Replacing MultiMarkdown, our new Markdown parser and renderer supports features like callouts, citations, and tables with captions. It also brings improved CriticMarkup support and is more compatible with AI-generated output. Choose the renderer in the *Preview* popup in the *Files > Markdown* settings.
- Supported on macOS Sequoia and later, new desktop widgets let you access your *Reading List* or *Favorites*, load a *Workspace*, or view a tip from our blog.
- View `.highland` Markdown files used by screenwriters.
- The new URL command, `x-devonthink://open-workspace?name=`, lets you open an existing workspace.

- **Pro** — DEVONthink gets its own MCP server that provides a bridge between your databases and supporting AI applications, e.g., Claude. Comprising a suite of almost 60 commands, it is built with data privacy and security in mind, controlling local or remote access, redacting

private information from being transmitted, honoring all exclusions from AI set on items (or databases), and limiting access to the internals of your database in the filesystem. In addition, when the server is running, a menu bar icon appears with commands for controlling the server, accessing the settings, or copying the URL you need. Requires macOS Sequoia or later.

- **Pro** — Use the new *Settings > AI > MCP* settings to set up and install the DEVONthink MCP server. The options include settings for privacy and making safe connections to other devices, on and off your network.
- **Pro** — The option *Exclude from Chat & MCP* in the *Database Properties* panel lets you easily exclude entire databases from AI access. This is enabled by default for encrypted and revision-proof databases.
- **Pro** — DEVONthink supports Apple Intelligence's Foundation model in the *AI > Chat* settings and AppleScript commands on macOS Tahoe and later. At this time, its use is limited to simple tasks like renaming, tagging, etc. as the context window is very small and vision is not supported.
- **Pro** — Choose the AI model for automatic tagging functions with the new *Chat Suggestions* popup in the *Files > Tags* settings. DEVONthink uses this, e.g., when importing files, using the *Data > Tags* commands, or smart rules and batch processing actions.
- **Pro** — Added support for LM Studio's reasoning effort (0.4.8 or later).
- **Pro** — You can now use an ollama.com account for web searches in the *AI > Search* settings.

- **Server** — Added an *Open Item Link* button to the *Action* ⚇ toolbar button and the context menu of the item list in the web interface. This opens a dialog to enter an item link to be revealed.
- **Server** — Added a *Reveal* command to the context menu of search results in the web interface's item list, revealing the item and its location in the *Navigate* sidebar.
- **Server** — Added *Move*, *Duplicate*, and *Replicate* commands to the context menu in the web interface's item list, allowing you to navigate to and choose the destination for these functions.
- **Server** — Added a section for classifying items to the *See Also* inspector of the web interface, including a context menu with related commands.

- Converting Markdown documents to plain text, e.g., via the *Data > Convert > To Plain Text* command, strips all Markdown formatting and converts MathJax and DisplayMath into a more readable form.
- Sheets transcluded in Markdown use an underlying Markdown representation for a more consistent appearance across documents.
- The "What's New" window also appears while DEVONthink is in fullscreen mode.
- Copying item links includes a Markdown-formatted link for use with third-party editors.
- You can use an alternative syntax, `:==`, synonymously for the *is* search operator, e.g., in `created:==2026-04-14`.

- Commands like *Open Externally* use fewer resources, improving DEVONthink's responsiveness.
- Both the `digital object identifier` AppleScript property and the *Digital Object Identifier* smart rule and batch processing placeholder use also the URL to retrieve the DOI. The chat assistant and MCP server of the Pro edition benefit from this too.

- **Pro** — AI responses use our new Markdown parser, e.g., in the *Chat* assistant or the summary and transform popovers. Additionally, the *Chat* assistant knows how and when it's appropriate to use Markdown callouts (admonitions).
- **Pro** — The *Chat* assistant, AI smart actions, summarize and transform functions, AI-related AppleScript commands, and the new DEVONthink MCP server, redact or anonymize email addresses, links, credit card numbers, phone numbers, authentication tokens, and labeled secrets in the information sent to LLMs.
- **Pro** — The *Chat* assistant displays images returned by Perplexity Sonar models.
- **Pro** — The *Help* assistant uses fewer tokens and is faster and more reliable.
- **Pro** — "Exclude from Chat" in the *Generic* inspector is now *Exclude from Chat & MCP*.
- **Pro** — *Local Apple SpeechAnalyzer* replaces the "Local Apple Speech" option in the *AI > Transcription* settings on macOS Tahoe and later. This utilizes Apple's new SpeechAnalysis framework which processes audio locally and up to five times faster. Additionally, it will automatically download and install resources available for the specific language being transcribed.
- **Pro** — Researching PubMed and arXiv via the *Chat* assistant is more reliable.
- **Pro** — If AI requests the text contents of a document, DEVONthink provides a Markdown representation for better access to things like links and styling. This applies to RTF(D), HTML pages, formatted notes, and web archives. (PDF and EPUB documents are already supported). It also improves responses from many AI features, e.g., the *Chat* assistant and the `get chat response for message` AppleScript command.
- **Pro** — Batch tagging is more reliable with low-tier models, e.g., Magistral.
- **Pro** — The default role for AI-related features, e.g., the AI smart actions, `get chat response for message` AppleScript command, etc., includes the date, weekday, and current time.
- **Pro** — If the digital object identifier (DOI) or international standard book number (ISBN) is in the text, metadata, or content of a document, it is available to AI functions like the *Chat* assistant, `Chat - Query` smart action, or `get chat response for message` AppleScript command without processing the document further.
- **Pro** — Tagging documents with AI retains the spelling when *Files > Tags > Use only existing tags of a database* is enabled.
- **Pro** — An improved definition of DEVONthink's search syntax makes database searches via the *Chat* assistant, `Chat - Query` smart actions, and the `get chat response for message` AppleScript command more precise and reliable.
- **Pro** — Claude Opus is now at version 4.7, both via API and OpenRouter. With a knowledge cutoff of January 2026, it supports up to one million input tokens and 128,000 output tokens

as well as high-resolution image processing, up to 3.75 megapixels. The Sonnet models also support up to one million tokens now.

- **Pro** — Updated OpenAI's GPT models to version 5.5, supporting a context window of one million tokens and a knowledge cutoff date of December 1, 2025, but at a much higher cost. Also, the internal names of these models no longer reference the version, ensuring future updates don't adversely affect scripts, templates, or smart actions.
- **Pro** — Updated Gemini 3.1 Flash (Preview) to Gemini 3.5 Flash, both via Google and OpenRouter. Note that the new model is three times as expensive as the former one.
- **Pro** — Gemini 3.1 Flash Lite is available via API and OpenRouter.
- **Pro** — Updated the Mistral Small model to version 4 and Mistral Medium to 3.5, both with a context window of 256,000 tokens and reasoning capabilities. However, these models are much more expensive than the previous ones.
- **Pro** — Qwen 3.5, Gemma 4, and versions 3 and 4 of Mistral Small are better supported locally and via OpenRouter.
- **Pro** — Improved token usage when using Perplexity for Web & Wikipedia searches.
- **Pro** — Updated the Flux image generation models to Flux 2 Klein, Pro, and Max. They support standard and HD quality and image editing, but not styles.
- **Pro** — Nvidia's Nemotron 3 is better supported.
- **Pro** — Xiaomi models are available in OpenRouter.
- **Pro** — Updated many models in OpenRouter: Grok 4, replaced by Grok 4.2. Mistral Small 3.2, replaced by Mistral Small 4. Gemma 3, replaced by Gemma 4. GLM 4.6 and 5, replaced by GLM 5.2. GLM 4.7 Flash, replaced by GLM 5(V) Turbo. Xiaomi MiMo-V2-Flash/Omni/Pro, replaced with MiMo-V2.5 and MiMo-V2.5 Pro. DeepSeek 3.2 and DeepSeek 3.2 (Speciale), replaced with DeepSeek V4 or DeepSeek V4 Flash. Kimi K2 2.5, replaced by Kimi K2 2.6. All Qwen models, replaced by various 3.6 models.
- **Pro** — OpenAI's GPT-OSS models are better supported via LM Studio or Ollama local.

- **Server** — A better PDF viewer in the web interface supports a table of contents, thumbnails, and searching in all browsers. Additionally, toolbar search terms are automatically used when selecting a PDF document in the search results.
- **Server** — The context menu in the web interface's item list is better supported on mobile devices.
- **Server** — Double-clicking a group in the search results of the web interface's *item list* now opens the group.
- **Server** — DEVONthink's self-signed certificates generated in the *Server > General* settings use even stronger 2048-bit encryption.

- **Sync** — Synchronizing RSS feeds less frequently duplicates articles.

- Converting Markdown documents to paginated PDF documents could sometimes fail. Fixed.
- Opening braces with no matching closing braces could break Markdown transclusions. Fixed.

- Converting images to PDF or merging PDF documents on macOS Tahoe could produce a document with only white pages. Fixed.
- Scrolling or selecting pages in a PDF document could mark the document as modified. Fixed.
- On rare occasions, annotating PDF documents could cause an exception. Fixed.
- Multi-page TIFF files couldn't be viewed or converted on macOS Tahoe. Regression. Fixed.
- Web windows opened without a record, e.g., via AppleScript, always opened at the same size with the Inspectors open. Fixed.
- Scrollbars in *Widescreen* mode didn't behave properly on macOS Tahoe. Fixed.
- Resizing document windows after switching to side-by-side mode didn't work correctly on macOS Sequoia and later. Fixed.
- Group tags didn't appear correctly in inactive tag fields. Fixed.
- In tagging fields, the popup arrow on hovered tags didn't appear in the correct position. Fixed.
- Depending on the date, time, and current locale, the contents of the *Log* window's *Date/Time* column could appear clipped. Fixed.
- Tooltip and click positioning in the *Editing* and *Navigation* bars were affected by a window's width on macOS Tahoe. Fixed.
- When using a Markdown document in the *Annotation* field of the *Annotations & Reminders* inspector, the *Format > Add Link* and *Format > Edit Link* commands weren't supported. Fixed.
- The *Content > Table of Contents* inspector didn't display correctly with Markdown documents using more than three backticks to mark fenced code blocks. Fixed.
- Clearing the color of groups and tags from the *Generic Info* inspector or *Info* popover didn't sync between devices. Fixed.
- On startup, a failure to open a database showed an alert that could freeze the application on rare occasions. Fixed.
- The JavaScript command `addReminder` didn't use the correct scheduling. Fixed.

- **Pro** — Transcribing PDF documents on demand, e.g., via *Data > Recognition* or automatically, produced inconsistent results. Fixed.
- **Pro** — Empty black or white PDF pages weren't ignored as input, leading to unnecessary AI time and token usage on macOS Tahoe. Fixed.
- **Pro** — Blockquotes in the *Chat* assistant weren't styled. Fixed.
- **Pro** — Text pasted into the *Title* field of the *Imprinter* settings incorrectly added a `%` character. Fixed.
- **Pro** — Adding or deleting a *Font* placeholder in the *Title* field of the *Imprinter* settings didn't update the *Font* selector popup. Fixed.
- **Pro** — Inserting a *placeholder* before an existing placeholder in the *Imprinter* settings replaced all the text following the new one. Fixed.
- **Pro** — Custom metadata definitions added via AppleScript could cause sync issues. Fixed.

- **Pro** — If DEVONthink was not running, the first scan from third-party software launched the app but didn't run OCR on it. Fixed.

- **Server** — In the web interface, PDF documents couldn't be viewed in Safari. Fixed.
- **Server** — PDF documents viewed in the web interface on an iPad only displayed the first page. Fixed.
- **Server** — Markdown documents didn't display images using relative links in the web interface. Fixed.
- **Server** — The table of contents for EPUB files didn't work. Fixed.
- **Server** — The arrow indicating the item list's sort direction was the opposite in the web interface. Fixed.
- **Server** — The user icons in the *Server > Users* settings didn't display correctly when launching in dark mode and switching to light mode while the settings were open. Fixed.

- **Pro** — Removed the *Remote Apple Speech* option from the *AI > Transcription* settings on macOS Tahoe and later.
- **Pro** — Removed OpenAI's GPT 4.1 models from API access and OpenRouter. We've also removed GPT 5.1, GPT 5.2, and GPT 5 Nano and Mini from OpenRouter as they have been superseded by newer models.
- **Pro** — Removed Claude Opus 4.6 (Fast) from OpenRouter.

VERSION 4.2.2

Today's maintenance release lets you create powerful AI-driven searches and add tags more reliably via scripting. If you are using JavaScript for your automations, you can now use `.js` files. In AI, Gemini and Nano Banana get updates, and Claude 3 Haiku retires. We also have a few fixes, including better handling of `.opml` email attachments.

- **Pro** — Perform AI-driven research with multiple sources, e.g., arXiv, PubMed, even your databases, with the new `perform chat research` AppleScript command. Control where AI searches with the `sources` parameter and the number of results with `maximum results`.

- The appearance of placeholder text in the interface, e.g., in some empty table views, is more consistent with the system settings.
- We made some cosmetic improvements to the sidebar in the *Help* viewer.
- You can now load external JavaScript for Automation (JXA) scripts with a `.js` extension in the *Scripts* menu, as well as use them for smart rules and batch processing.
- Tags separated by commas or semicolons are better parsed and applied when set via scripting.
- Updated application icon for older macOS releases and Sparkle.

- **Pro** — The automatically generated identifiers of custom metadata (see *Data* settings) now ignore characters reserved for our search syntax, e.g., `:`.

- **Pro** — Database searches via the *Chat* assistant, *Chat - Query* smart action, or the new AppleScript `perform chat research` command now filter irrelevant results.
- **Pro** — Revisions to the internal names of Anthropic's Claude models ensure future model updates won't break existing scripts, templates, or smart rules. Also, the *AI > Research Report* and The Devonian Times templates now use Sonnet's revised name.
- **Pro** — Gemini Pro and Flash Lite are now at version 3.1 (Preview) via the native API and OpenRouter. Also, Gemini 3.1 Pro and 3.1 Flash handle reasoning better. Note that Gemini Flash Lite 3.1 (Preview) is more expensive than the former version 2.5.
- **Pro** — More reliable support in the chat assistant, the *Chat - Query* action of smart rules and batch processing, and the `get chat response for message` AppleScript command for evaluating mathematical expressions. In addition, the constant eps0 is now also supported.
- **Pro** — Ollama has improved support for the lfm2 model and GPT-OSS now reasons better.
- **Pro** — Ollama reasoning models (except GPT-OSS) enable thinking now only when using *Settings > AI > Chat: Usage: Best* (option is also available in the chat assistant). Otherwise it's disabled to speed up responses (e.g., up to twelve times faster in case of Qwen3.5).
- **Pro** — Nano Banana 2 replaces version 1 and now supports the *Quality* (HD or Standard) setting.
- **Pro** — The script assistant supports GPT 5.3 Codex via OpenRouter.
- **Pro** — We improved the AppleScript dictionary description of the `transcribe record… language` command.

- **Server** — When revisiting the *web sharing interface*, a warning dialog will appear if you're not logged in.

- Repairing a database with orphaned OPML documents incorrectly converted them to RSS feeds or outlines. Fixed.
- The *View > Hide/Show toolbar* command wasn't disabled in the *Help* viewer. Fixed.
- Converting an empty rich text document to plain text or Markdown failed. Fixed.

- **Pro** — Importing OPML email attachments always converted them to RSS feeds or outlines and could create orphaned files. Fixed.

- **Pro** — Removed the soon-to-be-retired Claude 3 Haiku. Bulk tasks, e.g., filtering search results, are now done with 4.5 Haiku. Note that the 4.5 model is more expensive.
- **Pro** — Removed all Qwen3 235b models from OpenRouter, except the ones for coding. Use the latest Qwen 3.5 models instead.

VERSION 4.2.1

This maintenance release lets you mirror DEVONthink reminders to Apple Reminders via a new script. It also includes a hidden preference to disable dark mode only for PDF documents on macOS Tahoe or later, and lets you run batch processing on specified records via AppleScript. The

Pro and Server editions support Claude Sonnet and Opus 4.6 and improve the support for zAI and Qwen models. The update brings several fixes, too, e.g., for lists in rich text documents not displaying on macOS Tahoe.

- The *Scripts > Reminders > Export to Reminders* menu item mirrors DEVONthink reminders to a DEVONthink list in Apple Reminders.
- A hidden preference, `DisablePDFDarkMode`, disables dark mode for PDF documents on macOS Tahoe or later.
- The `perform batch configuration… record` AppleScript command lets you run a batch configuration on specified records.

- **Server** — In the web interface, the toolbar search now supports the `scope:` prefix and its abbreviation, `s:`, similar to the `search` AppleScript command (see below).

- Search hits in PDF documents are better visible in dark mode on macOS Tahoe.
- Sorting sheets is more reliable on columns with identical cell content, especially dates.
- DEVONthink now better captures web content as clutter-free documents.
- The width of the current main or document window again determines the maximum width of the inspectors pane.
- The *Thumbnails* inspector is more reliable and should alleviate some rare crashes, e.g., caused after moving documents.
- Updated icon for the Global Inbox counterpart in the Finder.
- The AppleScript `search` command now supports the `scope:` prefix (or its abbreviation, `s:`) if you leave the `in` parameter unspecified or as a missing value. Supported scopes are: `all`, `inboxes`, `inbox`, `tags`, `trash`, or the quoted name of a database.

- **Pro** — Updated support for Claude Sonnet and Opus to version 4.6 via the native API and OpenRouter. The script assistant also uses the latest version of Claude Sonnet. For both models, DEVONthink uses adaptive thinking and effort instead of budget tokens (only natively via Anthropic).
- **Pro** — The *AI > Research Report - PDF*, *AI > Research Report - HTML*, and *AI > The Devonian Times* templates now use Claude Sonnet 4.6.
- **Pro** — Replaced zAI's GLM 4.7 with the latest version GLM 5 from OpenRouter.
- **Pro** — Improved support for zAI's GLM 4.x models.
- **Pro** — Optional support for API keys for LM Studio 0.4.0 or newer.
- **Pro** — Updated or replaced various OpenRouter models for the script assistant with more powerful models. Additionally, we have removed several OpenRouter models that no longer exist.

- Lists, e.g., bulleted lists, in rich text documents didn't display correctly on macOS Tahoe. Fixed.

- Checkboxes in sheets, as well as boolean custom metadata in *List* views in the higher editions, didn't display correctly on the latest macOS releases. Fixed.
- In the *Info > Annotations & Reminders* inspector, text colors in Markdown annotation documents were inconsistent. Fixed.
- Dates in sheets or *List* view columns weren't parsed correctly if the date contained a four-digit year and didn't match the format set in the system settings. Fixed.
- PDF text and note annotations didn't always remember their last used font, so changes such as moving or editing text reverted them to a default font. Fixed.
- Clipping paginated PDF documents didn't build them correctly on macOS Tahoe. Fixed.
- Emptying the trash could show a wrong, unnecessary alert in case of indexed, trashed items which can't be deleted (e.g., located in the user's library folder). Fixed.
- Finder tags of updated indexed items were used if the option to export Finder tags (see *Settings > Files > Tags*) was enabled instead of the option to import Finder tags. Fixed.
- Removing all tags, e.g., via *Data > Tags > Remove All Tags*, didn't trigger the `On Tagging` event of smart rules. Fixed.
- Minor visual glitches of *File > Database Properties* popover in the case of read-only databases. Fixed.
- The `createRecordWith` JXA command didn't support all properties of smart groups. Fixed.
- The `unlinked Wiki links` AppleScript property was incorrectly included in the `properties` property. Fixed.
- The direct, unnamed parameter of the `search` AppleScript command wasn't marked as required and can't be a missing value. Fixed.

- **Pro** — *Settings > Imprinter* didn't always save modified options. Fixed.
- **Pro** — Changing the duplex setting of the scanner interface could freeze the application. Fixed.

- **Pro** — Removed unsupported GPT Audio and GPT Audio Mini models from OpenRouter.
- **Pro** — Removed obsolete MoonshotAI Kimi K2 0905 and MoonshotAI Kimi K2 Thinking models from OpenRouter. Use the latest MoonshotAI Kimi K2.5 model instead.
- **Pro** — Removed obsolete zAI's GLM 4.5 Air model from OpenRouter. Use the new GLM 4.7 Flash model instead.
- **Pro** — Removed Qwen3 Max and Qwen3 VL models from OpenRouter. Use the latest Qwen3.5 models instead.

VERSION 4.2 CASSINI

DEVONthink introduces a refreshed look with a new app icon and full support for Apple's Liquid Glass design on macOS Tahoe. On macOS Sequoia and later, sidebars and inspectors now animate smoothly in and out, and the Navigate sidebar is spring-loaded. Simply drag items to the window edge to reveal it automatically. PDF documents on Tahoe also respect your dark mode preference for more comfortable reading.

The Chat assistant gains powerful new capabilities: adjust many options directly within the chat window, and access up to 50 saved conversations to pick up right where you left off. You can now choose between DEVONthink, Perplexity, or Exa for web and Wikipedia searches, giving you control over speed versus freshness. Updated AI models including Claude 4.5, GPT 5.2, Gemini 3, and Google Nano Banana Pro, deliver improved performance across all AI use. When generating images, you can choose the aspect ratio.

New workflow tools help you work faster: the detachable Graph popover lets you visualize document connections, you can manually save named versions for finer revision control, and annotation files are now easier to create, locate, and open directly from menus and inspectors. Markdown documents also support smart quotes and dashes for polished typography.

> Note: DEVONthink now requires macOS 13.5 Ventura or later.

> Note: We name this release after the Cassini lunar crater and its namesake, Giovanni Domenico Cassini (1625–1712). The Italian-French astronomer served as the first director of the Paris Observatory. Cassini was a methodical observer and organizer of knowledge, systematically cataloging celestial phenomena and discovering four of Saturn's moons and the division in its rings. His dedication to precise observation and documentation lives on as one of the foundational principles of science.

- DEVONthink supports Apple's Liquid Glass design language on macOS Tahoe and has a new, fitting app icon. We have modified many parts of the user interface and will continue to do so while Apple addresses issues. Many refinements we've made, e.g., to the popovers, apply to all supported system versions.
- The *Data > New > Sheet* panel lets you name the new sheet.
- An *Open* button in the *Annotations & Reminders > Annotations* inspector lets you quickly open the current annotation file.
- The *Versions* inspector supports manually creating named versions.
- The settings option *Files > Markdown: Preview: Smart quotes and dashes* tells DEVONthink to render quotes and dashes using their typographically correct variants.
- A warning shows when a database may be open in another user account.
- After updating DEVONthink to the next feature release, a *What's New* panel shows the top features of the release.
- A hidden preference, `WindowToolbarTitleHidden`, lets you hide a main window's title and gives you more space for toolbar items. Note that you cannot use it with the `WindowToolbarExpanded` hidden preference.
- The `unlinked Wiki links` AppleScript property for records helps detect WikiLinks without a linked item.
- The `HTTP response` class has two new AppleScript properties, `error code` and `error domain`, to aid in troubleshooting.

- **Pro** — New settings in the *Chat* assistant let you dynamically change options for the current chat, including the *Search* scope, *Usage*, and *Documents* mode.
- **Pro** — The *Chat* assistant now saves up to 50 chats, defined via the option *Max. Recent Chats* in the *AI > Chat* settings. DEVONthink automatically names previous chats and lets you access or remove them via the button in both the *Chat* inspector and popover. Up to ten of today's chats are listed at the top with previous chats in date-specific submenus. Selecting a previous chat will attempt to reveal or open the associated document or selection with the previously used document mode.
- **Pro** — You can open the *Chat* popover via the keyboard shortcut ^⌘A that we added to *Tools > Chat*.
- **Pro** — The new menu command *Tools > Graph* opens the *Graph* inspector in a floating, resizable popover. This popover will be restored on launch and with workspaces.
- **Pro** — Separate *AI > Search* settings let you control where you want AI to search. This also includes new *Web > Wikipedia* settings to search via DEVONthink (slower but more up to date), Perplexity, or Exa (faster, but using indexed content).
- **Pro** — The *AI > Research Report* template is now also available in a PDF variant.
- **Pro** — Support for DeepSeek 3.2 and 3.2 (Speciale) via OpenRouter.
- **Pro** — Support for the image generation model *GPT-Image-1-Mini*, accessible in the *AI > Image Generation* settings and the *Generate Image* panel.
- **Pro** — Support for Google Nano Banana Pro, generating images in 2K and 4K. Note that it generates images more slowly and is more expensive than Google Nano Banana. Also, the *Mixture-of-Agents- Images* template uses Google Nano Banana Pro, if available.

- Main and document windows now use modern APIs on macOS Sequoia and later, providing animated toggling of the sidebars and inspectors. You can also collapse these panes by dragging the separator to the window's edge.
- On macOS Sequoia and later, the *Navigate* sidebar is now spring-loaded and will automatically pop open if you drag an item to the left side of a main window.
- The *Format Bar* is available in fullscreen window mode on macOS 15 and later. You show or hide it with *Format > Show/Hide Format Bar*.
- The selected row in the *Move To* and *Insert Link* popovers has better contrast when they don't have focus.
- DEVONthink more consistently positions popovers relative to the current window.
- You can make the group selector larger than before.
- The appearance of informational text is more consistent throughout the interface.
- On macOS Tahoe, PDF documents now display in dark mode when *General > Appearance > Use dark background for documents* is enabled.
- When converting a rich text document to PDF, DEVONthink checks if the source document only contains a single PDF attachment and no useful text, then uses the found PDF. This also applies to email conversions in the Pro and Server editions.

- New entries made via *Data > Add To > Table of Contents* can use the bounds of a selection instead of just the page.
- The *Table of Contents* inspector is more compatible with poorly constructed HTML content, e.g., created by some AI models.
- The "Remind Me" submenu in the *Data* and context menus is now *Annotate & Remind*. You can still set a due date on a selected item but you can also create a new annotation document via the template of your choice. The annotation will open in a new document window or be displayed in the *Annotations & Reminders > Annotations* inspector, if it's open.
- The *Insert Quote* command of the *Info > Annotations & Reminders* inspector supports also Markdown documents.
- In the *AI > See Also* inspector, the keyboard shortcut for the *Move To* command is only shown when the ^ Control key is pressed.
- The context menu of the item list of main windows now includes a *Reveal* command to reveal replicants, duplicates, and an item's annotation document.
- The command *Apply Rule* is now available in the context menu for smart rules added to the *Favorites*.
- The document date placeholders submenus are now under the *Document* options.
- Using *Data > Mark* to lock or unlock a group applies the same to its children. This does not apply when locking an item via scripting or smart rules.
- Drag-and-drop or copy-and-paste is now more compatible with third-party editors.
- DEVONthink no longer shows a warning dialog after it crashed or was quit forcefully.
- Automation prompts to allow DEVONthink to control the Finder no longer self-dismiss.
- The `compare` AppleScript command now only returns a maximum of 40 results, consistent with the *See Also & Classify* inspector.
- You can now control how long the `download URL` and `download markup/JSON from` AppleScript commands run by using a `with timeout of x seconds… end timeout` block.

- **Pro** — Bookmarks are now supported in many AI-driven functions, like labeling, rating, and tagging via the *Data* menu, summarization, as well as smart rules, batch processing, and AI placeholders.
- **Pro** — When using an AI model supporting tool calls, e.g., the ChatGPT models, the *Chat* assistant can temporarily highlight words or sentences in the currently viewed document, similar to the *Search* inspector.
- **Pro** — The *Chat* assistant can now create comma or semicolon-delimited sheets (`.csv`), instead of just tab-delimited (`.tsv`) ones.
- **Pro** — The "Research Overview" template is now *AI > Research Report - HTML*.
- **Pro** — The *AI > Research Report* and *AI > The Devonian Times* templates use updated models: Gemini 3 Pro or Flash Preview, GPT 5.2, or GPT 5 Mini.

- **Pro** — The *Help* assistant now first tries to determine the most relevant help pages. This can drastically reduce the number of tokens used, up to 90%, and allows use of newer or more expensive (and more capable) models.
- Updated Google Nano Banana from preview to final release.
- **Pro** — *Aspect Ratio* replaces the "Size" option in the *AI > Image Generation* settings and *Generate Image* panel. Also, the `aspect ratio` AppleScript parameter replaces the "size" parameter of the `download image for prompt` command. Supported sizes are `1:1`, `16:9 (9:16)`, and `4:3 (3:4)`. This setting as well as which generative model is used and, optionally, the quality setting, control the size of the resulting image.
- **Pro** — The *Chat* assistant and AI actions like tagging or rating, better handle errors. The assistant also more reliably clears chats. DEVONthink better filters AI-generated error messages like those from placeholders in smart rules and batch processing, and also handles OpenRouter errors better, e.g., when a provider is overloaded.
- **Pro** — Updated GPT 5.1 to GPT 5.2, natively and via OpenRouter. Also, GPT 5 Pro, 5.1 Codex, and 5.1 Codex Mini are available in the *Chat* assistant via OpenRouter, the Codex and Codex Mini models in the *Script* assistant.
- **Pro** — Updated GPT-Image-1 to GPT-Image-1.5. The *Data > New From Template > AI > Mixture-of-Agents* template support the new model.
- **Pro** — Updated Anthropic Claude 4.1 Opus to 4.5 and Haiku to version 4.5, natively and via OpenRouter. Claude 4.5 Opus is less expensive, a new parameter reduces response time and costs. Claude 4.5 Haiku supports reasoning, more output tokens, and has knowledge up to July 2025.
- **Pro** — Updated Gemini 2.5 Pro to Gemini 3 Pro and Gemini 2 Flash to Gemini 3 Flash (Preview), natively and via OpenRouter. Also, responses to vision requests are quicker, cheaper, and support a vision limit of 200 items, useful for video, multi-page PDF documents, and multiple selected images.
- **Pro** — Updated support for Mistral Large 3, including via OpenRouter. Also Mistral's Devstral Medium model is now Devstral 2, with a context window of 256,000 tokens and supported in the *Script* assistant.
- **Pro** — Mistral and local models have improved tool call support.
- **Pro** — Ollama, LM Studio, and OpenAI (Compatible) models now require a minimum context window of 4,096 tokens. We recommend 16k (16,384), when possible.
- **Pro** — Depending on the usage setting, LM Studio can process images with a maximum dimension up to 2,048 pixels.
- **Pro** — DEVONthink examines and filters OpenAI (Compatible) models for capabilities, e.g., vision or tool call support, with servers not reporting this information on their own. Note that the context window still needs to be specified. This provider is also more compatible with endpoints hosting models like GPT 5.x or the O-models.

- **Pro** — Updated further models usable via OpenRouter: Grok 4 Fast to Grok 4.1 Fast, Nova Lite 1.0 to Nova 2 Lite, and zAI's GLM to version 4.7.
- **Pro** — Better support for the Qwen3 models.
- **Pro** — OpenRouter models now prioritize price (*Cheapest*) or thoroughness (*Best*) for models having multiple providers, depending on the *AI > Chat > Usage* setting.
- **Pro** — The `Chat - Query` smart action works more reliably with low-tier models like GPT 5 Nano or Mini.
- **Pro** — The `get chat response for message` AppleScript command has a better description.
- **Pro** — The `as` parameter for the `get chat response for message` AppleScript command accepts `PDF` to return a paginated PDF document of the response.
- **Pro** — The appearance of the *OCR* settings is more consistent with other settings panes.

- **Sync** — Bonjour passwords stored in Keychain Access now use the host's ID as the host name of a device can sometimes change when switching networks.

- Ordered lists in Markdown didn't render properly if there was no space after the dot. Fixed.
- Inline MathJax equations didn't always render properly in Asian language documents. Fixed.
- Web pages using the Consent framework crashed WebKit. Fixed.
- Converting emails (Pro and Server editions) and rich text documents to PDF documents could stall the app. Fixed.
- Converting HTML documents didn't convert code blocks correctly. Fixed.
- Capturing a web page within DEVONthink didn't honor the clutter-free setting. Fixed.
- Searching for tags in a toolbar search or via smart groups and rules didn't work correctly with groups excluded from tagging and grouped RSS feeds. Fixed.
- Switching between light and dark modes could cause visual artifacts in labels, ratings, and the *Activity* pane. Fixed.
- Destination popups, e.g., in the *Sorter*, didn't display correctly in dark mode if the destination was the root of the Global Inbox or database. Fixed.
- When detached, the *Information* popover didn't update when switching tabs in the frontmost document window. Fixed.
- The header of tables in various inspectors, e.g., *Concordance > List* showed artifacts on macOS Tahoe. Fixed.
- For favorited groups, the item count wasn't shown and their unread count didn't match what was reported in the item list. Fixed.
- The internal versions group was neither properly filtered when determining statistics in *Database Properties* nor was it ignored in toolbar searches. Fixed.
- Deleting a version from the *Versions* inspector would incorrectly close the current tab or document window. Fixed.
- The *Tools > Show Info* command closed the popover instead of activating it. Fixed.
- The context menu could display an unnecessary and disabled *Put Back* command. Fixed.

- The keystroke ^↩ on modern versions of macOS didn't work properly in Icon view and could also change text selections. Fixed.
- Pressing the ⎋ Escape key with the database authentication panel open caused an issue. Fixed.
- The *Sorter* didn't always appear in the menubar on macOS Tahoe. Fixed.
- The `Apply Rule` smart action didn't work properly if the applied rule ran asynchronous actions, like chat suggestions. Fixed.

- **Pro** — In rare cases, while in *List* view with a specific custom metadata field shown, disabling that field on another device and synchronizing could crash the app. Fixed.
- **Pro** — The *Tools > Chat* command didn't close an already open popover. Fixed.
- **Pro** — The prompt field didn't have focus when the *Chat* popover opened. Fixed.
- **Pro** — The *Model* popup in the *Script* assistant was too narrow for many OpenRouter models. Fixed.
- **Pro** — If the same model was accessible via a local and a remote Ollama installation, the local model was chosen in the *Model* popup in the *Chat* assistant or AI-driven smart actions, e.g., `Chat - Query`. Fixed.
- **Pro** — Embedded models in Ollama were not filtered from the model list. Fixed.
- **Pro** — The *Chat* toolbar item wasn't disabled when a *Chat* popover was already open. Fixed.
- **Pro** — Markdown blocks in chat messages were sometimes stripped out during chat or when saving the conversation. Fixed.
- **Pro** — A document containing text provided to the smart actions `Chat - Query` and `Chat - Continue if` wasn't handled correctly if the document mode was set to *Without Document* or *Document (Vision)*. Fixed.
- **Pro** — The *Data > New > Script* window had no title. Fixed.
- **Pro** — The *Quality* setting in the *Data > New > Generate Image* panel wasn't used. Fixed.
- **Pro** — Using *Data > Move to Trash* could have caused glitches if the icon view of the scanner interface was active. Fixed.
- **Pro** — Tags were not applied to a document when scanning to a binder. Fixed.
- **Pro** — The AI commands in the *Rating*, *Label*, and *Tags* submenus of the *Data* menu incorrectly showed a star when running the Pro or Server editions. Fixed.
- **Pro** — Changing the type of custom metadata fields, e.g., from Boolean or a number to a string, then editing a smart rule using these fields, could crash the app. Fixed.

- **Pro** — Removed tool calls for various AI functions from the *Chat* assistant: for compiling scripts, support prompts, and for showing a toolbar search. All these functions were superseded by the *Search*, *Help*, and *Script* assistants. These are less expensive, have shorter response times, and are more reliable.
- **Pro** — Removed Claude Sonnet 4 and 3.5 Haiku, both replaced by the 4.5 models.
- **Pro** — Removed the deprecated Sonar Reasoning model.
- **Pro** — Removed the outdated Dall-E 3 image generation model.

- **Pro** — Removed Grok 4 Fast from OpenRouter, replaced by Grok 4.1 Fast.
- **Pro** — Removed Devstral Small and Medium, including from OpenRouter, replaced by Devstral 2.
- **Pro** — Removed DeepSeek 3.1 Terminus from OpenRouter.
- **Pro** — Removed the Exacto models from OpenRouter as they weren't as reliable as expected, as well as support for Voxtral, GPT-5-image-1, GPT-5-image-mini-1, o4-mini-deep-research, and o3-deep-research.

  Visual glitches on macOS Tahoe after switching between light and dark mode, a common Liquid Glass issue.

VERSION 4.1.1

This release helps mitigate AI risks, especially when processing online content, to reduce the potential for malicious prompt behavior. We also updated the supported AI providers, adding support for Google's Nano Banana image engine and Anthropic's Claude 4.5 Sonnet.

DEVONthink now detects empty pages when clipping PDFs, ensuring more consistent and useful results, and we made the Safari and share extensions more reliable on macOS Tahoe. Mailboxes in the *Import* sidebar load faster and match Apple Mail's appearance and you can modify a document's searchable text via the chat or scripting. On the sync side, DEVONthink now automatically adjusts resource usage based on your machine's temperature and workload, and sync in general is more performant. Of course, we fixed bugs and glitches, too.

- We added independent buttons for the *Insert Back Link* and *Insert Quote* commands to the *Annotations & Reminders > Annotations* inspector.
- **Pro** — We added two new options to the *AI > Chat* settings: *Allow download of web pages* and *Load remote images automatically* to let DEVONthink download and examine web content while generating a response. We disabled these options by default, as they could be considered insecure.
- **Pro** — We added separate *Destination* settings for image recognition and multimedia transcription.
- **Pro** — DEVONthink now suports Anthropic's Claude 4.5 Sonnet model with pricing and possibilities identical to Claude 4 Sonnet. In addition, the *Script Assistant* uses now this model instead of Claude 4 Sonnet.
- **Pro** — We added support for Google's Nano Banana text-to-image engine in all image creation functions, e.g., the *Generate Image* window. This model supports image editing, and, unusually, defines the size and style directly from the prompt. You must have a Gemini API key to access this model.
- We improved the consistency of syntax colorizing for quotes in Markdown documents.

- When converting EPUB documents, clipping web content, or using the `download PDF document from` AppleScript command to create PDF documents, DEVONthink now detects empty black and white pages and either filters them out or aborts the clipping.
- When you select a local or global smart group or smart rule in the *Navigate* sidebar, DEVONthink now uses the targeted group as the destination for new items and grouping selected items.
- We reduced resources used for versioning by 90%, especially during toolbar searches and while updating smart groups and rules.
- DEVONthink now explicitly registers its extensions to ensure they're available in Safari and macOS' Share menu on macOS Tahoe or later.
- You can now modify the `plain text` AppleScript property of transcribed files, e.g., images, PDF documents, audio and video files. You can also use the `transcription` synonym.
- The external smart script `Zettel-ID` handles errors caused by Markdown documents that don't contain this ID.
- We improved the handling of *menu scripts* execution.

- **Pro** — Apple Mail mailboxes and their structures now load faster and more reliably in the *Import > Emails* sidebar.
- **Pro** — Cross-linking items is now easier; just drag and drop an item onto the item link pop-up menu in the *Info > Data* inspector or sheet form views.
- **Pro** — The *Help* assistant provides the current help page to the chat, enabling summarization, translation, and other AI-assisted tasks.
- **Pro** — The *Help* and *Chat* assistants retain unsent prompts when reopening windows, inspectors, or popovers.
- **Pro** — A revised system prompt for chats eliminates unnecessary AI remarks about anonymized links.
- **Pro** — You can optionally save images created or edited via the *Chat* assistant to the database via prompt. DEVONthink adds the prompt to the *Finder Comments* of the image.
- **Pro** — The *Chat* assistant lets you modify the searchable text of transcribed documents (e.g., images, PDFs, audio, and video files), allowing updates to translated or spell-checked versions.
- **Pro** — The context window of the current AI model now determines the number of tags available for the *Files > Tags > Import > Use only already existing tags of a database* setting.
- **Pro** — Database searches are faster across the board, from the *Chat* assistant to smart actions and scripting, with notable gains for local AI models.
- **Pro** — *Web* and *Wikipedia* searches via the *Chat* assistant, AI smart actions, and AppleScript commands now also use the Ecosia and Yahoo search engines and better filter results from Bing and Brave.
- **Pro** — All AI responses, whether from summarization, transformation, script commands, or the *Chat* assistant, now undergo sanitization to remove potentially insecure content. Tool call names are stripped from the input, web page downloads are restricted to non-

document queries, and the *Chat* assistant disables downloads after accessing item contents, annotations, or comments.

- **Pro** — DEVONthink more reliably handles broken links and item links, e.g, returned by OpenAI's gpt-oss model.
- **Pro** — Google's Gemini models now automatically use the latest versions of their Flash Lite, Flash, and Pro models
- **Pro** — The *The Devonian Times* and *Research Overview* templates now default to Claude 4.5 Sonnet when Claude is the selected AI provider.
- **Pro** — All Perplexity Sonar models now support vision capabilities.
- **Pro** — The Magistral Small and Medium models use version 1.2 now, adding vision support and expanding the context window to 128,000 tokens.
- **Pro** — Tool calls with Mistral and local AI are simplified and improved.
- **Pro** — Ollama (Remote) now supports API keys, e.g., for the new Ollama Cloud.
- **Pro** — The OpenAI (Compatible) option now works with a broader range of providers and models, including those managed by universities and other institutions.
- **Pro** — Qwen Code Plus is now available via OpenRouter in the *Script Assistant*.
- **Pro** — The `download image with prompt` AppleScript command clearly reports an error if the provided image data is not an image.
- **Pro** — We improved the `as` property descriptions for the `chat response for message` and `add custom meta data` commands.

- **Sync** — The *Reading List* sidebar and custom metadata now sync more reliably via Bonjour.
- **Sync** — DEVONthink now detects the battery and thermal state of the machine and automatically throttles CPU and I/O load during synchronization when necessary.

- Thumbnailing many small documents could sometimes cause a crash. Fixed.
- Converting rich text documents or emails to paginated PDF documents could intermittently freeze on macOS Tahoe. Fixed.
- Invalid relative image and transclusion links in Markdown could break document previewing or conversion, or crash the application. Fixed.
- Links entered in lists in Markdown documents didn't work properly in WYSIWYG mode. Fixed.
- Markdown headings containing code didn't display with correct colors. Fixed.
- Links pasted into Markdown lists did not use the correct color. Fixed.
- Searches with proximity operators didn't always highlight hits in PDF documents. Fixed.
- In macOS dark mode, text entered in new HTML documents didn't invert to white. Fixed.
- *Tools > Summarize Annotations* and the `summarize annotations of records` AppleScript command sometimes returned annotations in the wrong order, such as those made by PSPDFKit. Fixed.
- Web clipping via the *Sorter* when opened with the keyboard shortcut incorrectly included Safari's profile name. Fixed.

- Images dropped or pasted into Markdown documents with the *Files > Markdown > Import images to group* setting enabled didn't apply the *Files > Import > Recognition* or *Files > Tags > Import* settings. Fixed.
- Documents moved or duplicated between databases incorrectly added the extension to the internal name and document could be renamed with an empty name if *General > Appearance > Show filename extensions* was enabled. Fixed.
- Duplicate notifications from the *Extras* sidebar occurred when multiple main windows were open. Fixed.
- The AppleScript dictionary incorrectly defined and described the `root` of main windows. Fixed.
- The internal name of files created via AppleScript incorrectly retained the extension. Fixed.

- **Pro** — Loading the *Model* pop-up menu in the *AI > Chat* settings could sometimes cause a crash with local AI providers. Fixed.
- **Pro** — Claude AI wasn't working anymore in the *Help* assistant. Fixed.
- **Pro** — Retrying a chat in the *Help* assistant failed after reopening the panel. Fixed.
- **Pro** — The *Chat* assistant and chat response popovers, such as *Summarize*, didn't render code blocks or multiple tildes correctly. Fixed.
- **Pro** — The *Reveal* command in the item link pop-up menus of the *Data* inspector or sheet form view always opened a new window. Fixed.
- **Pro** — AI responses in the *Chat* assistant, AI smart actions, or the `get chat response for message` AppleScript command could stall if required items became unavailable, such as when an item was deleted or its database closed. Fixed.
- **Pro** — Image engines supporting image editing stopped working after creating two images. Fixed.
- **Pro** — The *OpenAI (Compatible)* option in the *AI > Chat > Provider* settings incorrectly required `/v1/` in the URL. Fixed.
- **Pro** — In the German localization, the *OCR > PDF Resolution* setting couldn't be changed. Fixed.
- **Pro** — In batch processing, the popovers in the `Chat - Query` and `Chat - Continue if` smart actions failed to initialize correctly after switching configurations. Fixed.

- **Sync** — Bonjour synchronization could sometimes cause memory issues. Fixed.

- **Pro** — We replaced no longer functioning models and outdated models from the OpenRouter options.

VERSION 4.1 EUROPA

Here it is, the first feature release for DEVONthink 4. Choose from a much wider range of server-based AI models via OpenRouter or by connecting to just any OpenAI-compatible provider. Integrate models from, e.g., Amazon, Meta, Microsoft, xAI, Baidu, Moonshot AI, Qwen, and more.

In addition, DEVONthink Europa adds native support for Claude 4.1 Opus, Gemini 2.5 Flash Lite, OpenAI GPT-5, Google Imagen 4, and the latest models by Mistral. Connect to your institution's Ollama installation with a new configuration option.

To further automate your work, describe your task to the AI-powered script assistant. It generates AppleScript and JavaScript for Automation (JXA) scripts and even corrects common scripting issues. Edit images, both generated or dropped in from other sources, with prompts using common AI image generation models. As generative AI is notoriously bad at maths, the *Chat* and other AI-assisted functions now support mathematical functions, and if you're working in academia, retrieval-augmented generation (RAG) gets direct access to the huge document collection on arXiv. In addition, DEVONthink Europa comes with a new Quick Look extension for previewing Spotlight results on macOS Sequoia and later, and more responsive editing of especially larger Markdown documents. It also updates and sorts lists and empties the trash significantly faster.

> Note: This version is named after Europa, Jupiter's fourth-largest moon. It is a captivating world encased in an icy shell that hides a global subsurface ocean, one of the most promising locations for extraterrestrial life in our solar system. Discovered in 1610 by Galileo Galilei, its name, rooted in Greek mythology, reflects its enduring allure as a symbol of curiosity and the unknown.

- A new script editor, opened via *Data > New > Script* lets you draft different DEVONthink scripts, e.g., for reminders or smart rules.
- A new Quick Look plugin lets you preview documents in, e.g., Spotlight searches on macOS Sequoia and later. This only supports standard file formats: rich and plain text, PDF, HTML, XML, images, audio, and video.
- A new search criterion `Kind is PDF+Text` serves as a shortened form of `Kind is PDF/PS` and `Word Count > 0`. Additionally, the toolbar search syntax is `kind:pdf+text`, its negated form `kind:!pdf+text`.
- Added a placeholder to the alarm text field in the *Info > Annotations & Reminders* inspector.
- The `Zettel-ID` external script for the `Script with Input/Output` smart rule action pull this information from Markdown metadata.
- The AppleScript `record` class supports the new read-only properties `language` and `markdown source`.

- **Pro —** Support for OpenRouter is available in the *AI > Chat* settings and the AppleScript suite. This provides access to some AI models that aren't natively supported. Currently accessible models are from: Amazon, Anthropic, Google, Meta, Microsoft, Mistral, OpenAI, Perplexity, xAI, Baidu, Deepseek, Moonshot AI, Qwen, zAI, noting we aren't providing access to beta, preview, experimental, outdated, or distilled models. The *Help* assistant, as well as the *Research Overview* and *Mixture of Agents - Text/Markdown* templates, also support OpenRouter.

- **Pro** — Added support for OpenAI's GPT-5 models. Currently much less expensive than the 4.1 models, it does have a much smaller context window of 400,000 tokens but supports more output tokens and has been trained on more up to date information. Due to the lower costs, web searches are filtered with GTP-5 Nano.
- **Pro** — Added support for Anthropic's Claude 4.1 Opus.
- **Pro** — Added support for Mistral's Voxtral transcription to the *AI > Transcription* settings. Currently, this uses Voxtral Mini and is less expensive than OpenAI's speech-to-text models.
- **Pro** — Added support for Google's Imagen 4 Ultra in the *AI > Image Generation* settings, the *Generate Image* window, and accessible via the `download image for prompt` AppleScript command. A Replicate.com account is required to use this model.
- **Pro** — Added vision support to the Perplexity models Sonar, Sonar Pro, and Sonar Reasoning.
- **Pro** — Added *Ollama (Remote)* the *Chat > AI > Provider* settings and renamed "Ollama" to *Ollama (Local)*. This allows you to access Ollama running on a network, e.g., at a company or university. The remote provider is also supported in AppleScript, e.g., by the `get chat response for message` command.
- **Pro** — Added a script assistant, available in the Script Editor window, smart actions *Apply Script* and *Script with Input/Output*, or reminder scripts. Describe the action you need and a code-compatible AI model will provide a draft script to get things started.
- **Pro** — Save all images in a chat with the *Save All Images* context menu of the *Chat* assistant, available if the current chat contains more than one image.
- **Pro** — The *Generate Image* window can now modify a generated image or one dropped or pasted into the window. Also, images generated via the *Chat* assistant can be modified. And as the *Chat* popover is persistent between launches, you can modify an image in it at a later time. Currently, this function is only available with certain models: Flux Schnell, Pro, Pro Ultra, Stable Diffusion Large or Turbo, and GPT-Image-1.
- **Pro** — The *Generate Image* window now displays a history of created images.
- **Pro** — Given the poor calculations produced by LLMs, a new tool lets the *Chat* assistamt, smart actions, and AppleScript commands evaluate mathematical expressions.
- **Pro** — Added the new *The Devonian Times* template, summarizing today's news via AI.
- **Pro** — Added the *arXiv* site as a search option in the *AI > Chat* settings.
- **Pro** — Added a *Language* menu to the *AI > Summarization* settings.
- **Pro** — Added a new built-in smart rule, `Apply Chat Suggestions`. This applies seven common AI suggestions to matched documents, e.g., tagging, summarization, etc., utilizing placeholders and one AI request. This rule can be duplicated and modified to suit your needs.
- **Pro** — The *Chat* assistant, smart actions like `Chat - Query`, and the `download chat response for message` AppleScript command can download links in various formats (HTML, Markdown, text, snapshot). The format is automatically chosen, either by the AI or depending on the user's prompt. Currently, this only works with commercial models.
- **Pro** — The new AppleScript property `current chat model` returns the default model.

- **Pro** — The new `get chat capabilities for engine… model` AppleScript command retrieves the capabilities of a specific AI model.
- **Pro** — The `get chat response for message` AppleScript command now has a `usage` parameter to improve results or control the costs of using external AI.

- "Audit-proof" databases have been renamed to *Revision-proof*.
- Editing very long Markdown documents is more performant. DEVONthink detects links in Markdown documents at least 25 times faster when syntax coloring and WYSIWYG is enabled.
- Markdown WikiLinking now supports `[[link|-]]` to use the title of a linked item. This can be useful when using short aliases for linking.
- Prism.js renders Objective-C code marked with the alternate `objc` or `language-objc` as well as the default `language-objectivec`.
- DEVONthink indexes web-based documents and converts them to plain text better.
- The *Go > To Document* and *Edit > Insert > Item Link* popovers now search after a short delay to avoid interfering with typing.
- Updating or sorting by name or kind in item lists is up to ten times faster, including in popovers such as *Go > To Document*.
- Editing annotations in the *Info > Annotations & Reminders* inspector now supports versioning.
- The *Data > Move > Put Back* command as well as its context menu counterpart display the destination when only one item is selected.
- For quicker sorting, the *Ascending* and *Descending* commands are now at the top of the *View > Sort* menu and the sort popup menu in the *Information* bar of main windows.
- The *Add* and *Preview* buttons in the *Sorter* now display their shortcut keys when you hold the Command key.
- In the *Sorter*'s *Voice Note* and *Video Note* tabs, the camera and microphone menu is disabled if DEVONthink is disabled in macOS' *Privacy & Security > Camera* settings.
- Emptying the *Trash* is up to five times faster when versioning is not enabled.
- DEVONthink's built-in folder action scripts now run smart rules using the `perform smart rule` AppleScript command with the `On Import` and `On OCR` event triggers, as appropriate.
- Querying tags via AppleScript is now supported, e.g., `tags contains "support"` or `where its tags contains {"2025","documentation"}`.
- Records now support the sheet-related AppleScript commands `get cell at row/column`, `set cell at row/column`, `add row cells`, and `delete row at position`.
- The AppleScript database property "audit proof" is now `revision proof`. However, `audit proof` has been added as a synonym to ensure backwards-compatibility.

- **Pro** — Summarizing documents to annotations, e.g., via *Edit > Summarize via Chat* or *Tools > Summarize Documents via Chat*, first saves a version when versioning is enabled.
- **Pro** — The *Research Overview* template now supports local AI engines and models having tool call support and a context window of at least 32,000 tokens.

- **Pro** — The notification of a chat-summarized RSS article is simpler when only one article is involved.
- **Pro** — The search assistant now accepts local AI models with a context window of at least 8,000 tokens.
- **Pro** — In the *Import > Image Capture* sidebar, the *Group* menu now has a search field for quickly locating groups. Also, the destination settings are saved after each scan and restored when reconnecting to the scanner.
- **Pro** — The *From* date in the *Import > Emails* sidebar now defaults to the last used *To* date.
- **Pro** — The *Chat* assistant better handles detecting selected documents, especially when using the *Chat* popover.
- **Pro** — AI-directed features using web, Wikipedia, and PubMed searches are more efficient, filtering out excess or links already processed by concurrent searches. This affects e.g., the *Chat* assistant, smart actions, and AppleScript commands, and could speed up responses and minimize token usage.
- **Pro** — The *Chat* assistant's progress indicator more clearly shows chat activity, e.g., searching or downloading resources.
- **Pro** — The *Chat* assistant doesn't scroll a received chat response out of sight anymore.
- **Pro** — Prompt fields across the application, e.g., in the *Chat* assistant, the *Generate Image* window, and the *Help* assistant, now support using ⇧↩ in addition to ⌥↩ for inserting a line break.
- **Pro** — The model menu in the *Chat* assistant features a search field if more than 25 items are available.
- **Pro** — Search request made to Google, Bing, and Brave via chat functions, e.g., the `Chat - Query` action or prompts in the *Chat* assistant are more reliable. DEVONthink also handles Mistral's rate limits better.
- **Pro** — Bulk processing items via chat, e.g., tagging or summarizing, uses better error handling.
- **Pro** — Chat tools calls for local AI models have a reduced temperature for more reliable results and can now download web pages as needed. In addition, the *Chat* assistant handles errors better.
- **Pro** — Irrelevant *PubMed* and *arXiv* search results are now filtered in all AI functions, e.g., in the `Chat - Query` smart action, maintaining the context of the current conversation. For commercial providers, the least expensive model is used for filtering. Additionally, once enough results have been received from these site and *Wikipedia*, other pending evaluations are cancelled, saving both tokens and time.
- **Pro** — Chat suggestions in smart actions, e.g., suggested tags, are more reliably retrieved.
- **Pro** — The `download image for prompt` AppleScript command now reports an error if the specified model doesn't support image editing. When using the Flux engine, the Flux Kontext models are used as they are built for image editing, not just generation.
- **Pro** — Updated Gemini 2.5 Flash to the final version.

- **Pro** — Both filtering web search results and the *Help* assistant use now Gemini 2.5 Flash Lite.
- **Pro** — Updated Google Image 4 to final version and is used in the *Mixture-of-Agents - Images* template.
- **Pro** — Both *AI > Mixture-of-Agents* templates no longer use Perplexity due to an increase in irrelevant responses.
- **Pro** — Updated Mistral Medium to version 3.1. Mistral Large 3 has better vision support. And "Mistral AI" has been renamed to *Mistral* in the AI settings and *Chat* assistant.
- **Pro** — The default context window set by DEVONthink for Ollama is now 16,000 tokens.
- **Pro** — The "GPT4All" provider has been renamed to *OpenAI (Compatible)* and can be used connect to any compatible remote services. It also now supports an API key, affecting the AI settings, menus and related AppleScript commands.
- **Pro** — Improved compatibility of chat-based smart actions with LM Studio's MLX models, e.g., Gemman 3n.

- **Server** — Improved HTTP handling, should also address a rare crash.

- Markdown lists didn't render properly when indented with one space. Fixed.
- Thumbnailing Markdown documents could cause a rare crash. Fixed.
- Scrolling Markdown documents was affected after pasting copied text, changing margins, or syntax highlighting. Fixed.
- Remote images in Markdown documents didn't render in WYSIWYG mode if the files didn't have a valid file extension. Fixed.
- Markdown MathJax equations in Asian text didn't render properly. Fixed.
- Indexed Google Drive documents couldn't be opened via the *Data > Open With* command. Fixed.
- Links using Apple Notes' URL scheme couldn't be clicked in documents. Fixed.
- For RSS and Atom feeds with multiple authors, only the first was used. Fixed.
- An open Quick Look panel didn't update when changing the selection of the view/edit pane when *General > Interface > Preview group content* was enabled. Fixed.
- In the item list in *List* view, the *Tags* column didn't display autocompletion results. Fixed.
- The tooltip shown when hovering over items with truncated names didn't fully display the name if the item also had property icons. Fixed.
- Groups with a custom icon and applied color displayed differently in different parts of the interface, e.g., the item list and context menu. Fixed.
- In the *Navigate* sidebar, you could only drag and drop multiple favorites, smart groups, or smart rules by the icon, not the name. Fixed.
- The *First*, *Previous*, *Next*, and *Last* commands in the *Go* menu couldn't be used in toolbar search results. Fixed.
- The search field in the context menu and destination popups, e.g., in the *Sorter*, didn't sort the results by relevance. Fixed.

- In a multi-monitor setup with vertically positioned screens, the *Sorter* was only partially visible as a docked tab. Fixed.
- The item count in the *Database Properties* window incorrectly included saved versions. Fixed.
- The internal versions group was incorrectly made visible in the *Sorter*. Fixed.
- The Spotlight index for a database could incorrectly contain document versions. Fixed, though rebuilding the Spotlight index via *Database Properties* may be needed.
- `.strings` files weren't indexed correctly, potentially affecting versioning of AppleScript modified files. Fixed.
- The `Scan Text` smart rule action didn't ignore Markdown metadata if there was no other content in the document. Fixed.
- If the DEVONthink helper background task crashed, other background tasks, e.g., running scripts, could be blocked for a period of time. Fixed.

- **Pro** — Processing multiple documents via the *Chat* assistant could sometimes crash the app. Fixed.
- **Pro** — Timestamps weren't properly restored when revisiting the *Chat* assistant. Fixed.
- **Pro** — Replies in the *Chat* assistant could contain improperly escaped Markdown. Fixed.
- **Pro** — The `(AI)` suffix on an AI-generated document names could be misplaced if the name already had a file extension. Fixed.
- **Pro** — Claude 3 Haiku responses in the *Help* assistant often included invalid links. Fixed.
- **Pro** — Switching to Mistral in the *Help* assistant and resending the last chat message failed. Fixed.
- **Pro** — AI-generated web searches containing multiple `site:` operators didn't work correctly. Fixed.
- **Pro** — Item links or WikiLinks to groups weren't supported in the *AI > Graph* inspector. Fixed.
- **Pro** — The *AI > Graph* inspector could incorrectly display a connection line to a hidden (disabled) node. Fixed.
- **Pro** — In the popup of URL fields in the *Info > Data* inspector and the form view of sheets, the *Paste* and *Remove* commands neither saved changes nor updated the layout. Fixed.
- **Pro** — In the *Import > Emails* sidebar, nested iCloud mailboxes were duplicated at the account's top-level. Fixed.
- **Pro** — Search queries using date-based custom metadata weren't always parsed correctly. Fixed.
- **Pro** — Some item properties, e.g., the URL or UUID, couldn't be retrieved by AI in the *Chat* assistant, smart actions, or the `get chat response for` AppleScript command. Fixed.
- **Pro** — The prompt for *Scripts > Chat > Geolocate Image* was incorrect. Fixed.
- **Pro** — The `get chat response for message… as HTML` AppleScript command could return incorrectly mapped links. Fixed.
- **Pro** — Gemini 2.5 Pro didn't work with the `get chat response for prompt` AppleScript command when thinking was disabled. Fixed.

- **Server** — The icons in the *Server > Users* settings didn't look correctly in dark mode. Fixed.
- **Pro** — Removed *Data > New from Template > AI > Script Assistant* as it has been replaced by the Script Editor and Assistant.
- **Pro** — Removed support for Google's Imagen 3 (Fast) AI model.
- **Pro** — Removed support for Anthropic's Claude 3.7 Sonnet and Claude 4 Opus AI models.

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Contributors to Shortcut Recorder, in no order in particular:

- Jesper, waffle software. Initial idea and concept, first shot at implementation using NSView.
- David Dauer. Refinement, cleaner reimplementation, documentation, IB Palette.
- Jamie Kirkpatrick, Kirk Consulting Ltd. Further modularisation and re-factoring, and general bug fixes.
- Ilya Kulakov. ShortcutRecorder 2.0 and further support.
- Alexander Ljungberg. Graphics for ShortcutRecorder 2.0

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OTHER PRODUCTS

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Besides DEVONthink, 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 & 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.