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TAKE CONTROL OF

DEVONthink 4

COVERS
DEVONthink for Mac
DEVONthink To Go

by JOE KISSELL

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Read Me First

Welcome to *Take Control of DEVONthink 4,* version 1.5, published in September 2026 by alt concepts. This book was written by Joe Kissell and edited by Glenn Fleishman.

This book teaches you the basics of DEVONthink version 4 for Mac and DEVONthink To Go version 4 for iPhone/iPad. You'll learn how to find your way around, get information into and out of DEVONthink, and take advantage of the program's most important features.

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Updates and More

You can access extras related to this ebook on the web (use the link in Ebook Extras, near the end). On the ebook's Take Control Extras page, you can:

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What's New in Version 1.5

Version 1.5 is the fifth quarterly update, with coverage up to DEVONthink 4.4 Tycho and DEVONthink To Go 4.2.2 Chandra. Changes in this version include:

- Updated numerous screenshots to reflect the new window appearance in macOS 27 Golden Gate
- Removed mentions of minor features that no longer exist, and adjusted wording to reflect interface changes
- Mentioned that DEVONthink redacts some personal information sent to LLMs; see Generative AI
- Added a tip in Add Web Content about the new Reader display
- Added the new Chat > Library tab in Configure AI Settings
- Mentioned new MailMaven scripts in Included Scripts
- Mentioned Shortcuts support for DEVONthink and DEVONthink To Go in Use Shortcuts
- Described the new Zen Mode and Control Center Widgets for DEVONthink To Go
- Added new settings in Configure DEVONthink To Go Settings

What Was New in Version 1.4

Version 1.4 was the fourth quarterly update, with coverage up to DEVONthink 4.3.2 Herschel and DEVONthink To Go 4.1.3 Lagrange. Changes in that version included:

- Mentions of the new MCP (Model Context Protocol) server in the Pro and Server versions of DEVONthink; see Info Inspector, Configure Database Properties, and especially Configure AI Settings

- Instructions for adding DEVONthink widgets to your Mac desktop (see Widgets) and your iPhone/iPad Home Screen (see Use Home Screen Widgets)
- How to use Apple Intelligence as an AI engine in DEVONthink and specify where AI can search; see Configure AI Settings
- New features and settings in DEVONthink To Go, such as RSS feeds; see Set Sync Options and Configure DEVONthink To Go Settings

What Was New in Version 1.3

Version 1.3 was the third quarterly update, bringing the book up to date with DEVONthink 4.2.2 Cassini and DEVONthink To Go 4.0.6. Aside from some minor wording changes (for example, to match renamed or relocated commands), here's what else was new in that version:

- Replaced most of the screenshots to reflect the Liquid Glass interface DEVONthink adopted (for Tahoe and later only) in version 4.2
- Mentioned the new floating popover for the Graph inspector; see Built-In AI and AI Inspector
- Added a tip about the new spring-loaded Navigate sidebar; see Navigate Sidebar
- In Sheet, mentioned that when you create a sheet, you can now name that sheet
- Explained where to find new settings for customizing AI search; see Perform an AI Search
- Added a tip in Use Reminders about exporting DEVONthink's reminders to Apple's Reminders app

DEVONthink's Documentation

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

Locating Settings

You can find DEVONthink's Settings window by choosing Settings or pressing ⌘-, (Command-comma). From there, you can select a pane with a broad category of settings (like Editing or Files) and then a tab with a narrower category (like Format or Import). To help make the text more readable, I don't spell out the full set of instructions for how to reach the location you need in the Settings window. Instead, I use a shorthand notation, like "go to Settings > Editing > Format."

Introduction

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

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

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

I want to be clear that this 300-page does not come even close to comprehensive. I don't cover, or even mention, a great many of DEVONthink's features, including some of the new ones introduced with DEVONthink 4. DEVONthink already has plenty of good feature-focused documentation in its built-in help files, which are also available as a standalone ebook. The purpose of this book is neither to

replace that information nor to explain the operation of every command and button.

Instead, I concentrate on the key tasks you'll want to accomplish. After providing an overview of the app's main concepts and interface, I walk you through the principal activities you'll do over and over, such as getting information into DEVONthink; organizing, finding, and working with that information; using any of numerous techniques to automate DEVONthink; and, finally, getting your information back out by exporting or sharing it.

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

Stepping Stones

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

Note: DEVONthink 4 comes in standard, Pro, and Server editions (see DEVONthink Editions for details). When I write "DEVONthink," I'm referring to features in all three; where appropriate, I point out which features are present only in the Pro or Server edition.

Version 1.2 of this book is current as of DEVONthink 4.1.1 Europa and DEVONthink To Go 4.0.3 Kepler. (DEVONtechnologies plans to use a different astronomical name for each "point" release, like 4.1 and 4.2.) We plan to update this book approximately once per quarter to keep up with changes in DEVONthink. Even so, you may occasionally encounter something in the book that doesn't quite match what you see on your screen. These small inconsistencies shouldn't cause you any problems, but I do recommend reading the release notes for each update of DEVONthink you install for details on what's new. And be sure to access the blog included in the online Ebook Extras for this ebook from time to time to see whether I've added any new information.

DEVONthink Quick Start

This book helps you find your way around DEVONthink 4 and explains how to use its most important features effectively. For the most part, each chapter builds on the one before it, so I recommend reading the book sequentially. If you choose to jump around, please read at least the first two chapters—Understand DEVONthink Basics and Explore DEVONthink's Interface—which help you understand the rest of the material.

Get your bearings:

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

Put DEVONthink to work:

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

Use DEVONthink with other devices and people:

- Keep multiple copies of DEVONthink in sync; see Sync DEVONthink Databases.
- Store and manage your DEVONthink data on any iPhone or iPad; see Use DEVONthink To Go.
- Share data locally or export it in numerous formats; see Get Information Out of DEVONthink.
- Use DEVONthink Server to share databases on the web; see Use DEVONthink's Web Server.

Go beyond the basics:

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

Understand DEVONthink Basics

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

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

What Exactly Is DEVONthink?

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

Among the many hats DEVONthink can wear are the following:

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

and you can group and identify information in ways the Finder doesn't offer.

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

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

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

- **Web and RSS reader:** There's no shortage of Mac web browsers (Safari, Firefox, Chrome, Vivaldi, and others) and RSS readers (NetNewsWire, Reeder, Feedly, lire, etc.). DEVONthink may not have all the bells and whistles of a standalone web browser or RSS reader, but unlike the others, it lets you integrate URLs, webpages,

news feeds, and other online content with the rest of your data in interesting ways, and, of course, it keeps all the content (and any associated metadata) indexed for fast searching.

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

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

Examples of Cool Things People Use DEVONthink For

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

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

DEVONthink Editions

DEVONthink 4 is just one app, but the available features vary based on which of three editions you've paid for and unlocked via online registration or an in-app purchase. You can find a list of differences on the DEVONthink Editions page; here's an overview of how they compare:

- **DEVONthink Standard:** The standard edition is the baseline. It packs a wide range of organizational features—including multiple databases, RSS reading, sheets, support for a variety of file formats, and support for AppleScript.
- **DEVONthink Pro:** The midrange choice adds features such as integrated support for numerous scanners, optical character recognition (OCR), and email archiving. It also includes imprinting for PDFs and images, a download manager, a concordance, custom metadata, and several other useful features.
- **DEVONthink Server:** The high-end edition adds just one feature: a web interface that enables you to share your databases over the web; other people can then view and edit database contents using a web browser, which may be especially handy for teams using more than one platform within their office.

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

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

Words You Should Know

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

- **Alias:** In DEVONthink, an *alias* is an alternative name for a document, which you can use to reference it elsewhere in DEVONthink—for example, when making WikiLinks (see Create a WikiLink). Compare with replicant, below.
- **Chat:** The Pro and Server versions of DEVONthink can optionally use the generative AI tools from various large language models (LLMs) to understand your queries and return useful information. DEVONthink sometimes uses the term *chat* as a shorthand way of saying "use generative AI." (See About DEVONthink and AI ahead, and, later, Use Generative AI Features.)
- **Classify:** When DEVONthink *classifies* a document, it uses its artificial intelligence to decide which existing group a document best fits in, and then moves it into that group.
- **Database:** The container in which DEVONthink stores content is called a *database*. On disk, this database consists of numerous files—settings, templates, metadata files, and so on—plus folders containing your documents themselves (text files, graphics, PDFs, etc.). Ordinarily, you need not concern yourself with these details; think of the database as a single big storage area for all your DEVONthink data. (To learn more about databases, see Set Up DEVONthink Databases and especially the sidebar How and Where Databases Are Stored.)
- **Document:** Any file you create with, or import into, DEVONthink is called a *document*—that includes not only text files but also graphics, audio, webpages, and many other kinds of data. It also includes smaller "snippets" of data (such as URLs, notes, and sheets—described just ahead), even though you wouldn't normally interact with them in the Finder as standalone files.

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

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

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

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

- **Inbox:** DEVONthink offers many ways to collect information from other places—dragging in files, using plugins to import messages from Mail or webpages from browsers, and so on. Depending on your settings and preferences, such items may need a temporary holding place until you decide how to group, tag, or classify them. That holding place is a special group called the *inbox*. Your inbox

shows you all the items you've added to DEVONthink but not yet explicitly put somewhere else. In fact, you can have multiple inboxes—one for each database plus a global Inbox—as I explain further in Inboxes.

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

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

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

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

- **Sheet:** In DEVONthink parlance, *sheet* is meant to evoke the idea of "spreadsheet." But really, a sheet is just a document consisting entirely of a table. You can add, delete, rearrange, and sort columns and rows; but sheets can't include formulas or calculations, produce

charts, or do any other fancy spreadsheet-like stuff. See Create Documents in DEVONthink for more on sheets.

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

- **Smart rule:** A *smart rule* is like a smart group in that it finds documents matching criteria you specify. But when it finds a match, it also performs one or more actions, such as moving or replicating a document, adding or changing metadata, performing OCR, or running an AppleScript.

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

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

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

  To empty the DEVONthink Trash—which, surprisingly, moves its contents out of DEVONthink and into the Finder's Trash—choose DEVONthink > Empty Trash. (Despite the warning DEVONthink

displays when emptying its Trash, the items aren't deleted permanently until you empty the Finder's Trash.)

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

Importing vs. Indexing

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

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

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

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

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

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

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

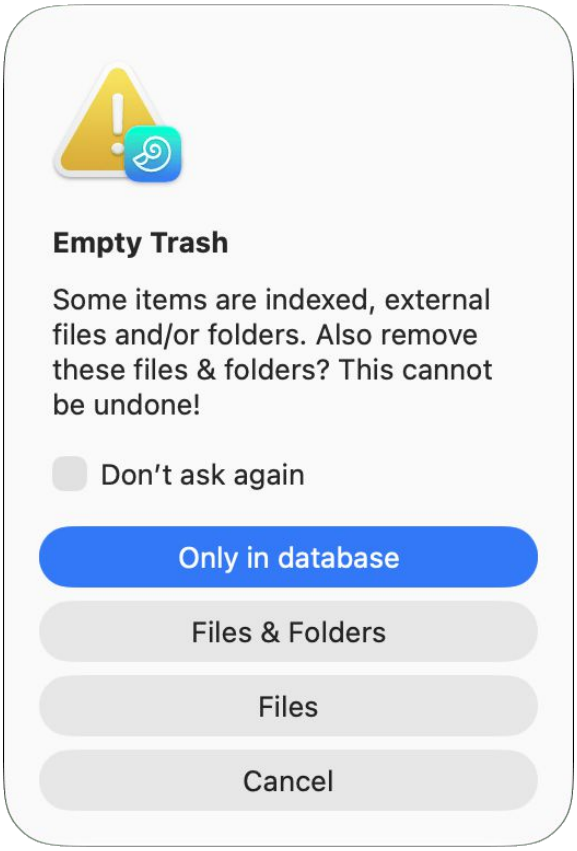

Figure 1: Use this dialog to determine what happens when you delete an indexed item and empty the Trash.

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

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

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

For example, if you maintain a folder with hundreds of spreadsheets, and ordinarily open them from the Finder—but also want to track certain of them in connection with a project in DEVONthink—then

indexing is the right move. It keeps the originals in place, but lets you take advantage of DEVONthink's numerous organizational features.

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

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

Updating Indexed Documents

Although DEVONthink usually updates its index automatically when a file on disk changes, sometimes things fall through the cracks—especially if the indexed file is on a network volume. Similarly, if you've renamed an item, changed its Spotlight comments, or made any other changes in DEVONthink while the original was unavailable, the corresponding file on disk might not update immediately when it's once again available.

And so, at any time, you can force DEVONthink to recheck the links between its index and external files by selecting one or more documents or groups and choosing File > Update Indexed Items (if no items are indexed, the command reads Update Items). When you do this, DEVONthink updates its database to reflect the files' current contents, updates metadata in the original files on disk as necessary, and removes from the index any files that no longer exist.

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

Stepping Stone: Try DEVONthink as You Read

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

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

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

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

About DEVONthink and AI

DEVONthink 4 incorporates three distinct varieties of artificial intelligence (AI): Built-In AI, Generative AI, and Apple Intelligence. You can use any, all, or none of them, as you prefer. Because of both the hype and the concern about AI these days, I wanted to spell out what these types of AI are and how DEVONthink uses them.

Built-In AI

For over 20 years, DEVONthink has had built-in artificial intelligence, which appears primarily in the See Also and Classify features (see Classify Documents, later, for more details).

See Also (Tools > Inspectors > See Also) is simply a list of *documents* that are similar to the one(s) you currently have selected, ranked in order of most to least similar based on an AI analysis of each document's contents. This list helps you discover connections between documents and locate material that's relevant to whatever you're working on at the moment. You can also see the connections to similar documents in a graphical form by going to Tools > Inspectors > Graph, or open the Graph inspector in a floating popover by choosing Tools > Graph.

The Classify feature (the top portion of the Tools > Inspectors > See Also pane) shows you which *groups* already contain documents similar to the one(s) currently selected—again, ranked in order of most to least similar. This list can help you identify the best place to file a document. The top choice, if any, is also available on the Data menu: Classify to "*Group Name*" (or Classify to *X* groups). Choose this command and DEVONthink puts the selected item(s) in the group(s) it thinks match best. Plus, there's a Data > Group Similar Items command (⌘-Option-Shift-G) that creates new groups for the selected documents it deems most similar to each other, and moves those documents into the new groups.

> **Note:** The Group Similar Items command is far from foolproof. After you use it, you may want to rename the automatically created group(s) and check to see whether you agree with the results.

This form of AI is essentially a fairly sophisticated algorithm that examines the text in a given document (along with document properties and custom metadata), compares it to the contents of all other documents, and mathematically computes the degree of similarity for each one. (It's analogous to the process a spam filter uses to determine, based on an analysis of an email message's contents, whether it's most

likely spam or legitimate.) This helps you determine where a document belongs and which documents might be related to it.

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

DEVONthink's built-in AI engine also helps DEVONthink suggest names for scanned documents.

See Also Everywhere with DEVONsphere

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

Generative AI

Increasingly over the past several years, most people have come to associate the term AI with one form of it, *generative* AI, which uses large language models (LLMs) to *generate* text and images based on prompts you supply. LLMs can also perform certain kinds of analysis on information provided, like summarizing a document. OpenAI's ChatGPT is the best-known generative AI engine, though there are many others, and development is proceeding at an astonishing pace.

Note: Each AI engine may, in turn, offer a variety of models based on larger, smaller, or different quantities of text (among other distinguishing features); each provides different tradeoffs in speed, cost, and accuracy. For example, OpenAI (the company) calls its engine ChatGPT, of which specific recent models have included GPT 5, GPT 5 (Mini), GPT 5 (Nano), GPT 4.1, GPT 4.1 (Mini), and GPT 4.1 (Nano), among others.

Typically, you type a prompt into an app or web form and the AI engine spits out a response, which may be anywhere from a few words to hundreds of pages. You can usually have something that resembles a natural-language conversation with the AI engine, asking questions, requesting changes or refinements to earlier answers, providing more detail to get a better result, and so on.

> **Note:** As a reminder, because people often use the word "chat" to mean "interacting with a generative AI engine," DEVONthink sometimes uses "chat" in a similar way, even if you aren't actually chatting in a given context.

One of DEVONthink 4's biggest new features is support for generative AI engines hosted online or running locally on your Mac. Here are just a few examples of things you can do with generative AI in DEVONthink, merely by typing your request:

- Summarize documents.
- Transcribe text from image, audio, and video files.
- Ask questions about your documents, including how they interrelate.
- Create new images based on your specifications.
- Draft email messages.
- Create AppleScripts for DEVONthink (and beyond).
- Enhance smart rules and batch processes.
- Get help using DEVONthink itself.

Now then! Common feelings about generative AI and LLMs range from gleeful fondness to scornful rejection, with a mixture of curiosity, hope, anxiety, and skepticism in between those extremes. (Full disclosure: I have some pretty deep concerns about generative AI myself involving accuracy, copyright violations, privacy, environmental impact, and all-around creepiness. I have found some limited applications in which the usefulness seems to outweigh the difficulties, though, and some of those are in fact within DEVONthink.)

Note: Take Control Books *never ever* uses AI to write books or other content, though we do show clearly delineated examples of the output AI provides when discussing relevant features, and some authors use AI tools to assist with proofreading, grammar checking, and the like. (See Our Stance on AI.)

If you dislike or mistrust LLMs, *you can completely ignore all the features in DEVONthink that use generative AI and the app won't attempt to get you to use them*. If you're a fan of AI or merely curious, you can do a lot with these new tools, although several caveats apply:

- Generative AI features are found *only* in the Pro and Server versions of DEVONthink 4.
- Although DEVONthink supports many engines and models, all of them require either an account and API key from the provider (which, in turn, usually require payment) or an engine installed directly on your Mac. Without either API access to an online engine or a local engine, DEVONthink can't use any generative AI features.
- The speed and quality of results you receive depend on the specific model you're using, your DEVONthink settings, and the phrasing of your prompts. In general, more expensive models are both faster and more accurate (as well as less likely to *hallucinate*—to make up answers when it can't compose one based on the data it has).
- Using generative AI features, or even just obtaining an API key, requires a nontrivial amount of technical know-how, and most of those details are beyond the scope of this book.

You have to send text or other data to an LLM to get a response. Thus, any requests sent to an external provider will include some of your data, such as the text you type in, selected documents, or other data you expressly permit use of. However, DEVONthink makes every effort to limit the information sent to LLMs to preserve your privacy. This includes identifying and redacting your name and any phone numbers before sending text to an LLM. (For more details, consult the DEVONthink documentation.)

For details on how to configure and use these features in DEVONthink, see Use Generative AI Features, later in the book.

Apple Intelligence

Introduced as part of macOS 15 Sequoia, iOS 18, and iPadOS 18, Apple Intelligence is Apple's marketing term for a collection of generative AI features that (unlike most) emphasize privacy and improving existing Mac capabilities. It's closely connected with Siri, and has an option to hook into ChatGPT. Of the many aspects of Apple Intelligence, one available from within DEVONthink (on supported Macs with Apple Intelligence enabled): Writing Tools. These features can proofread or summarize text, rewrite it in various ways (for example, to make it friendlier or more professional), and even compose text from scratch based on a prompt you supply.

As in nearly every other Mac app that supports text editing, these tools are available on the Edit > Writing Tools submenu and the Writing Tools submenu of the right-click (or Control-click) contextual menu. In addition, if you select some text in an environment where editing is possible and then wait a moment, a blue Apple Intelligence icon appears to its left; click this to display a popover with the same controls. Because this is a systemwide feature, I don't cover it in further detail in this book.

Note: DEVONthink also works with Apple's Vision and Speech frameworks, which provide on-device OCR and speech-to-text features, respectively. Although these frameworks, which have been around for several years, do involve machine learning, they're not part of Apple Intelligence and not usually considered generative AI.

What DEVONthink Is Not Good For

If it's not obvious by now, I like DEVONthink a lot, and I think it's a fantastically useful, powerful, and flexible app. Nevertheless, it's not the right tool for every job, and there are some tasks that it could theoretically accomplish…but not very well.

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

- **Cataloging photos:** If you're working on a project that includes photos (even a lot of photos) along with other types of data, it's no problem to keep your photos in DEVONthink. However, keep in mind that DEVONthink can't do half the things Photos can do (not to mention other photo library apps such as Adobe Lightroom CC). For that reason, I do not recommend using DEVONthink as the primary tool for storing and organizing all your digital images.
- **Managing music:** What's true of photos is equally true of music and other audio. DEVONthink can store audio files, no problem, and it can even play them back, but that's about it. You can edit some metadata for audio files in DEVONthink, but forget play counts, the iTunes Store, equalization, format conversion, and all the other things you rely on Music for.
- **Outlining:** Even though you could use a series of nested groups to create a rudimentary outline, or manually make a bulleted or numbered list with varying levels of indentation, DEVONthink lacks a proper text-based outliner (with collapsible entries) along the lines of the one in Microsoft Word or OmniOutliner.
- **Web browsing:** When it comes to viewing the odd webpage here and there (especially when following links from other documents in your database), DEVONthink's built-in web browser is adequate. However, I'd never recommend it as a primary web browser, because it lacks many of the tools and convenience features of pretty much every standalone browser—form autofill, integrated search engine support, browsing history, and so on. (DEVONtechnologies does, however, make a capable standalone web browser; see the sidebar Using DEVONagent Pro with DEVONthink.)
- **Reading news feeds:** For news feeds relating to a project that you're tracking in DEVONthink, the built-in RSS reader makes it easy to pull in and index relevant content. When it comes to reading feeds, most users prefer a dedicated app such as Reeder or Net-

NewsWire, but for some purposes (such as using smart rules to evaluate new articles), DEVONthink may be a better choice.

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

Explore DEVONthink's Interface

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

Support Assistant

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

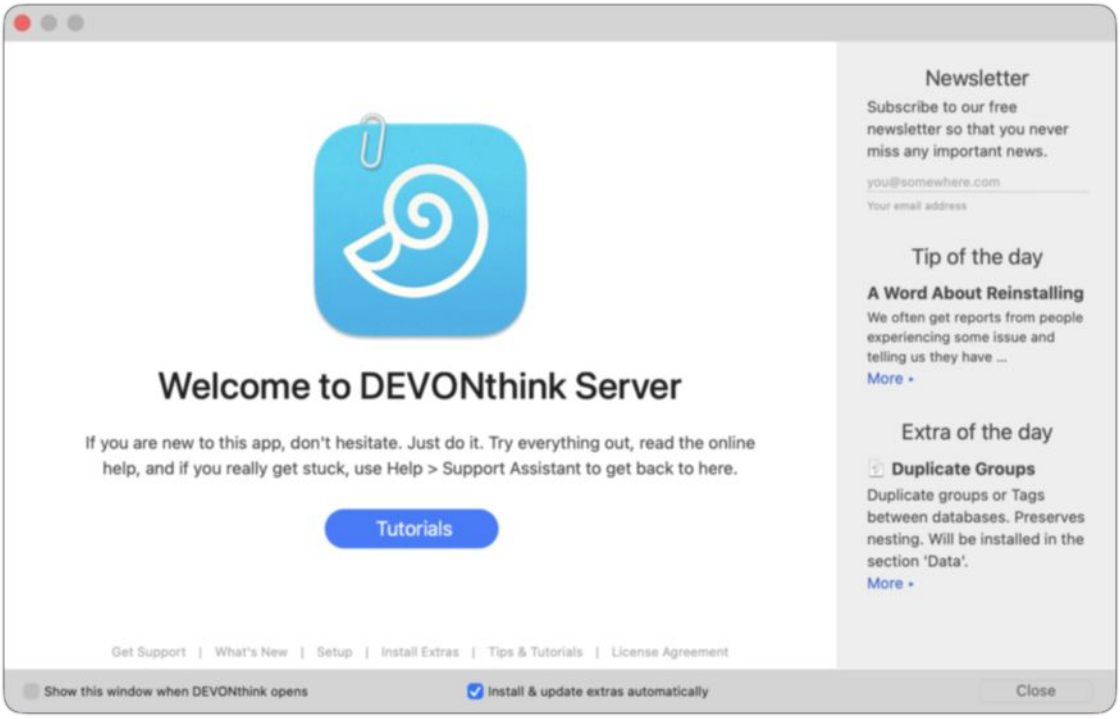

Figure 2: The Support Assistant welcomes you with tips and tutorials.

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

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

- **Newsletter subscription:** To subscribe to a free periodic newsletter with DEVONthink tips, enter your email address under "Newsletter." Then click the blue checkmark icon to subscribe.
- **Tip and extra of the day:** The right side of the Welcome screen presents a random selection from the tips and extras, all of which are found elsewhere in the Support Assistant.
- **Technical support:** Click the Get Support link at the bottom of the window for shortcuts to the DEVONthink FAQ, user forum, and contact page, plus tools to retrieve a lost license (or buy a license if you're still using the free trial), update your name or email address, and read the DEVONtechnologies blog.
- **Extras:** Click the Install Extras link at the bottom of the window to display a screen with extra AppleScripts, smart rules, and templates (beyond those installed automatically or via the Add-Ons window, discussed next); you can install any of these by clicking the Install button beneath it. (To remove an installed item, click Remove.) You can also check the "Install & update extras automatically" box at the bottom, which installs all the extras immediately and keeps them up to date automatically.
- **Setup:** Click the Setup link at the bottom of the window for a quick three-step overview of how to get started with DEVONthink—make a database, install add-ons, and customize. (Feel free to skip these; I cover all these things later in the book.)
- **Tips and tutorials:** Click the Tips & Tutorials link at the bottom of the window to show a selection of text-based tips (at the top) and step-by-step illustrated tutorials (at the bottom).

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

Add-Ons

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

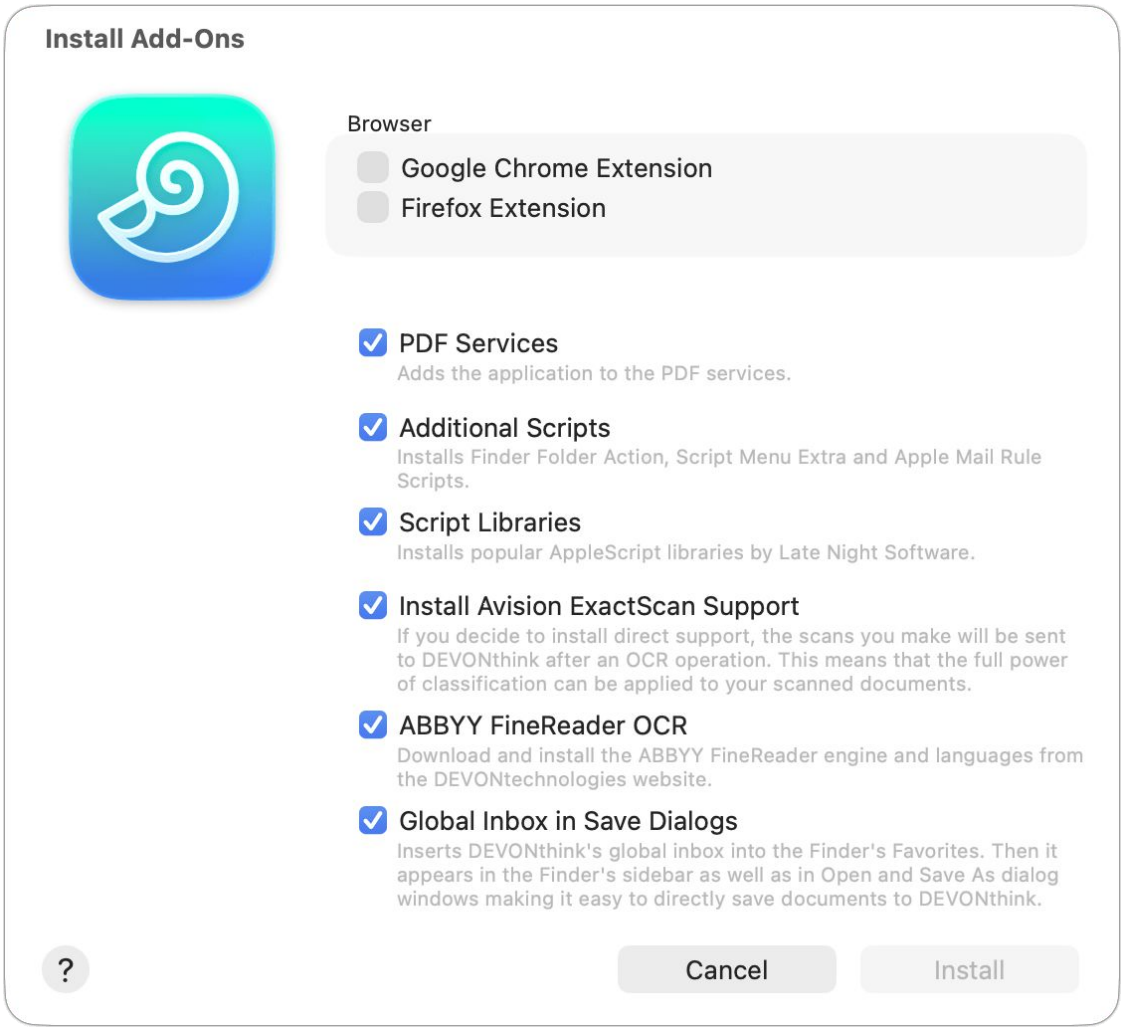

Figure 3: This window enables you to install useful add-ons with just a few clicks. (The "Install Avision ExactScan Support" checkbox appears only if you already have ExactScan installed.)

For now, I recommend leaving the default items selected, clicking Install, and following the prompts, because the additional tools may be useful to you. If you choose to skip this now, or omit any of the add-on

options, you can always return to this window later. I describe most of these add-ons and how to use them later in this book.

Main Window

When you begin using DEVONthink, the main window looks something like **Figure 4**. This is where nearly all the action happens. DEVONthink integrates almost everything into a single window, with sidebars, toolbars, and context-sensitive inspectors.

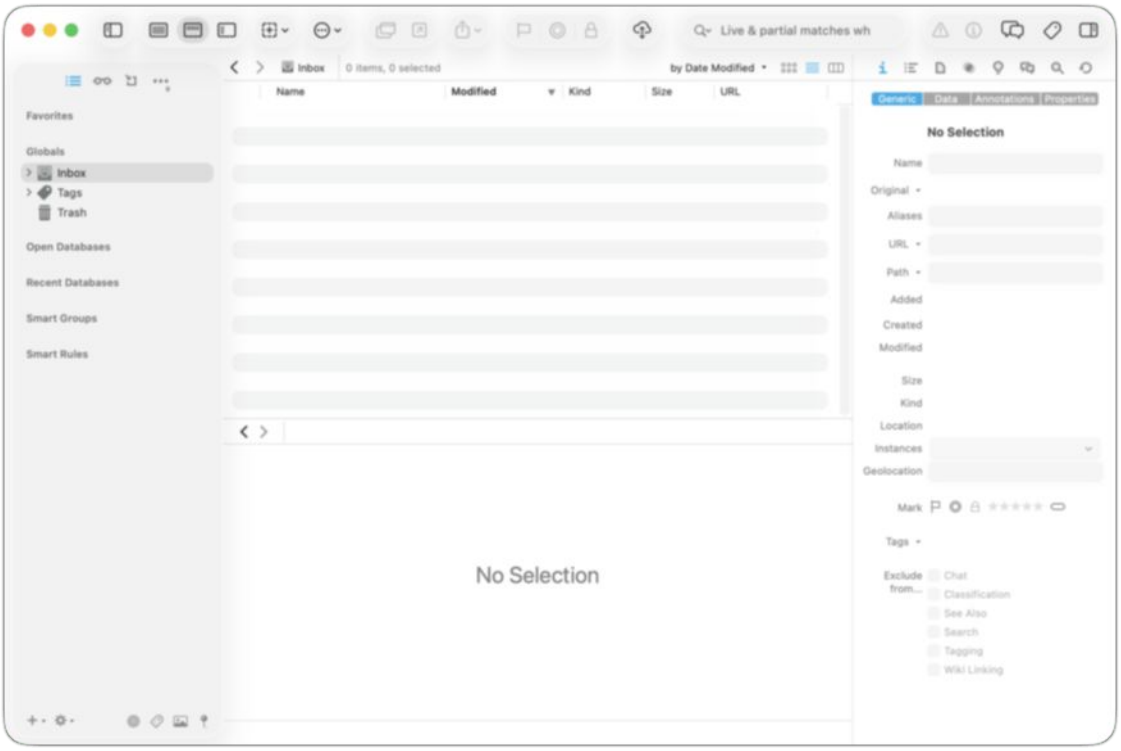

Figure 4: The main window in DEVONthink looks something like this by default.

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

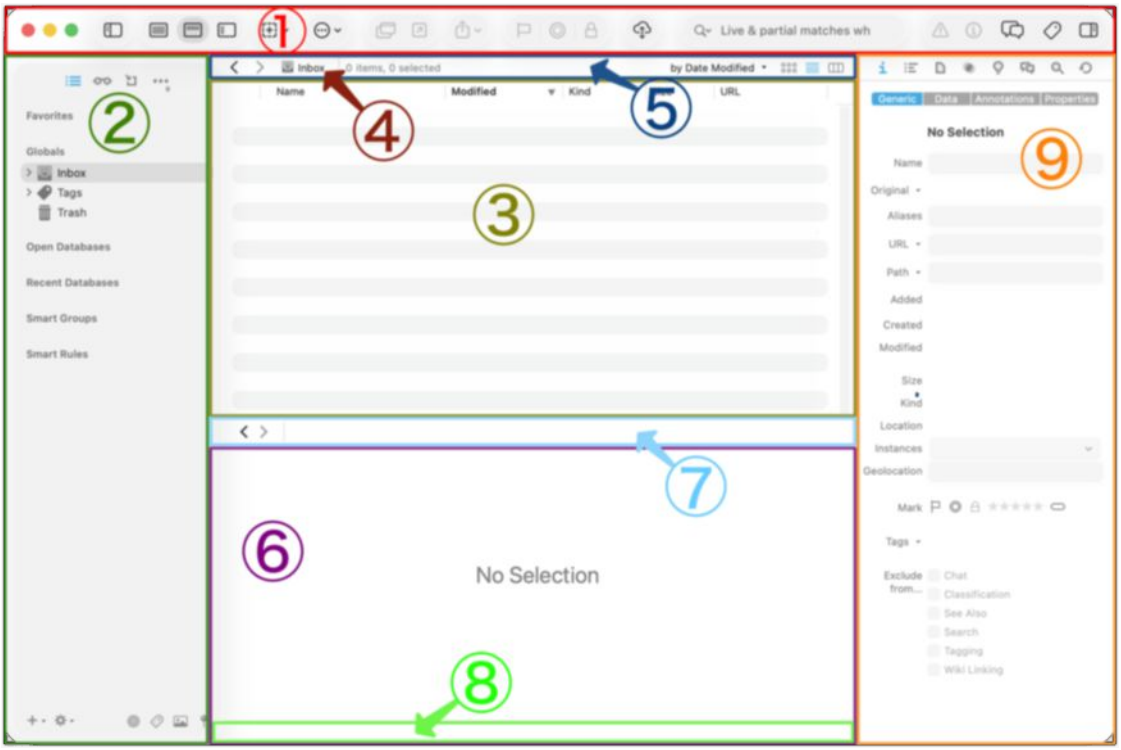

Figure 5: The main parts of the DEVONthink window: ① toolbar, ② sidebar, ③ item list, ④ path bar, ⑤ information bar, ⑥ view/edit pane (or preview), ⑦ navigation bar, ⑧ tag bar, ⑨ inspectors.

DEVONthink offers a flexible set of controls to create *almost* any layout you may want. You can selectively show or hide almost every part of the window, and choose a vertical or horizontal arrangement of the item list and view/edit pane. (It also offers two Full Screen options.) Keep reading in this chapter for further details.

Toolbar

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

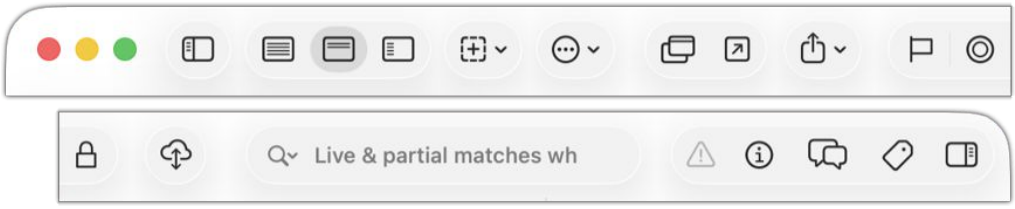

Figure 6: Access frequently used commands via the toolbar. (Split in half to show detail.)

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

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

Sidebar

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

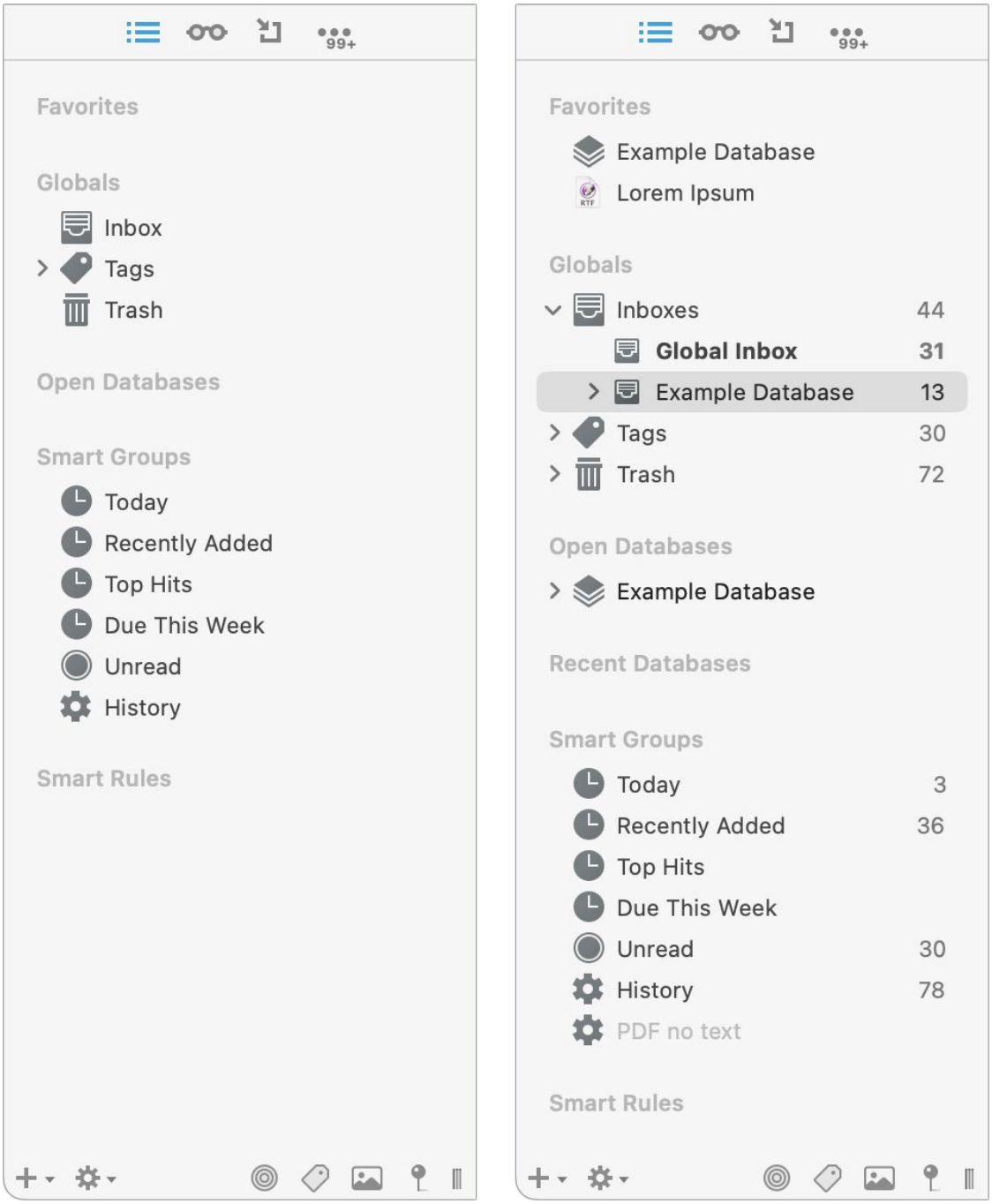

Figure 7: The sidebar displays your favorites, inbox, open databases, and other frequently accessed items. Left: as it starts out, mostly empty; right: populated with some example items.

You can hide the sidebar by choosing View > Hide Sidebar; to display it again, choose View > Show Sidebar. If the sidebar is hidden, however, you won't be able to see or access your global Inbox (see Inboxes), Trash, favorites, global smart groups, or global smart rules.

Navigate Sidebar

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

> **Tip:** In Sequoia or later, the Navigate sidebar is now spring-loaded, which means that if it's hidden and you drag something to the left edge of the window, it opens automatically.

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

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

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

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

You can alter these settings in Settings > General > Interface in the Sidebar section:

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

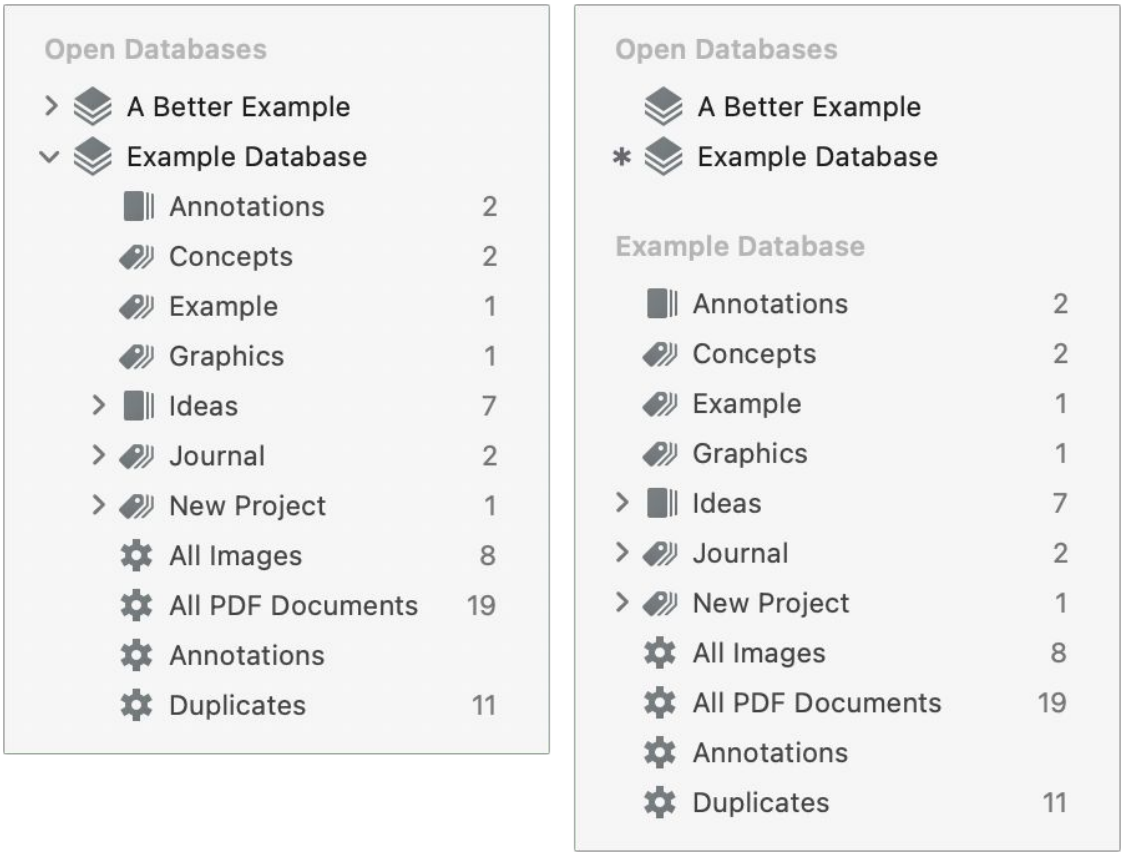

Figure 8: The effect of having “Unify databases” on (left) and off (right). In the latter, the selected database, expanded under its own heading, has an asterisk (*) next to its name under Open Databases.

- With “Unify inboxes” checked (the default), each database’s inbox appears in the Inboxes group under Globals (**Figure 9**, left). If you uncheck “Unify inboxes,” only the Global Inbox appears under Globals, while each database’s inbox appears under that database’s name in the Open Databases section (**Figure 9**, right).

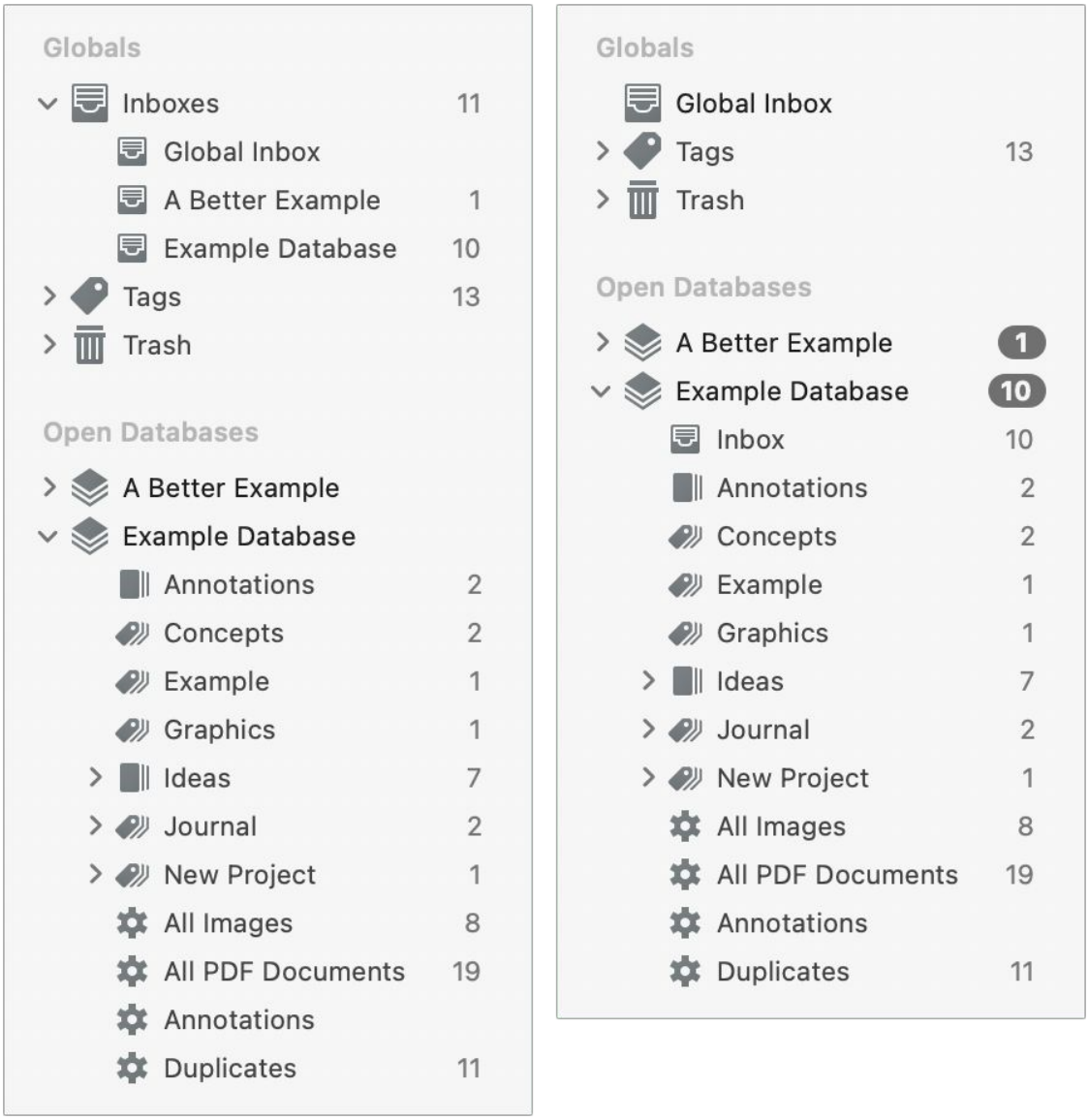

Figure 9: The effect of having "Unify inboxes" on (left) and off (right).

All About Favorites

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

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

Reading List Sidebar

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

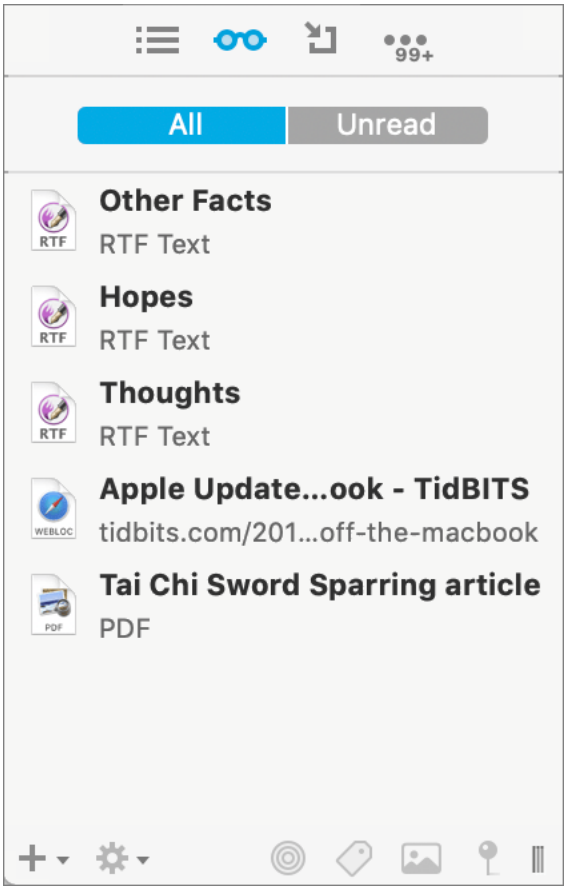

Figure 10: Documents to be read appear in the Reading List sidebar.

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

Import Sidebar

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

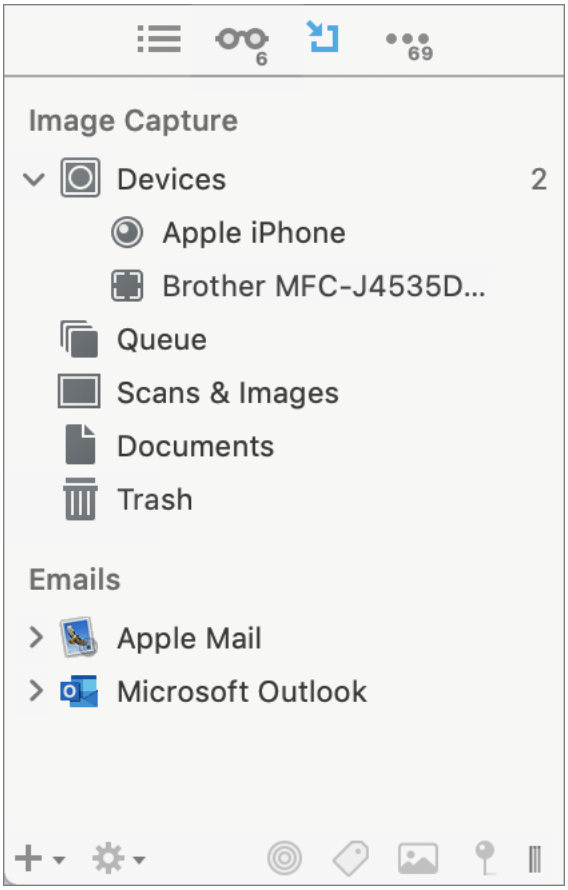

Figure 11: The Import sidebar provides just one of several ways to import scanned documents and email messages.

Extras Sidebar

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

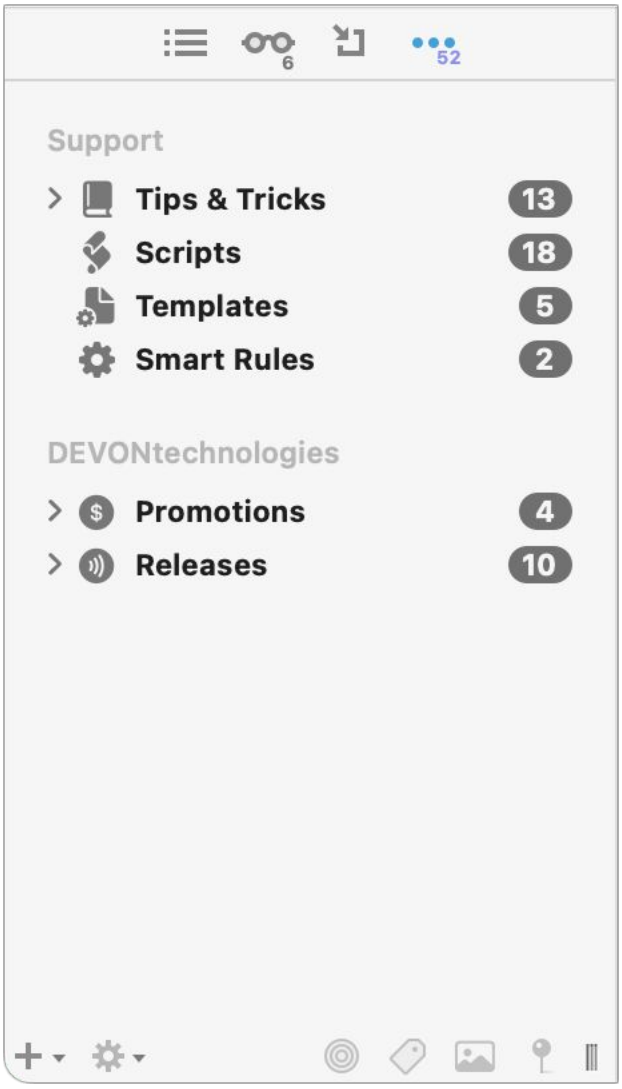

Figure 12: The Extras sidebar gives you another way to access the latest tools and info from DEVONtechnologies.

Item List

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

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

Stepping Stone: Pick a Layout, Any Layout

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

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

View as Icons

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

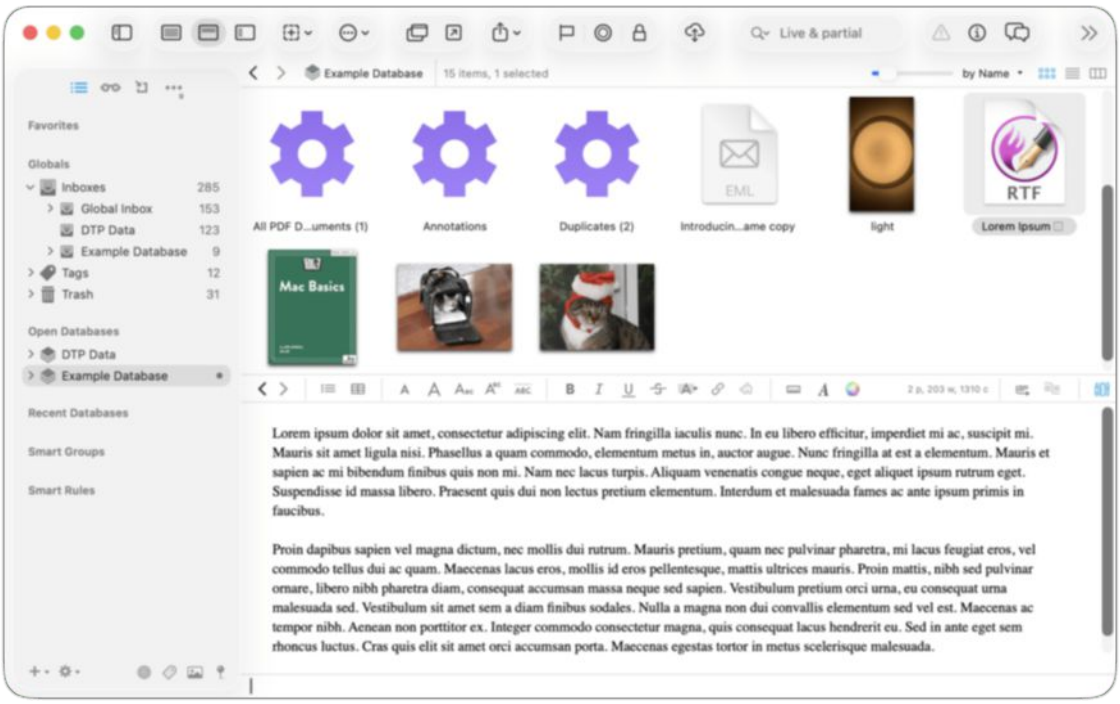

Figure 13: Icon view shows resizable thumbnails of each item.

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

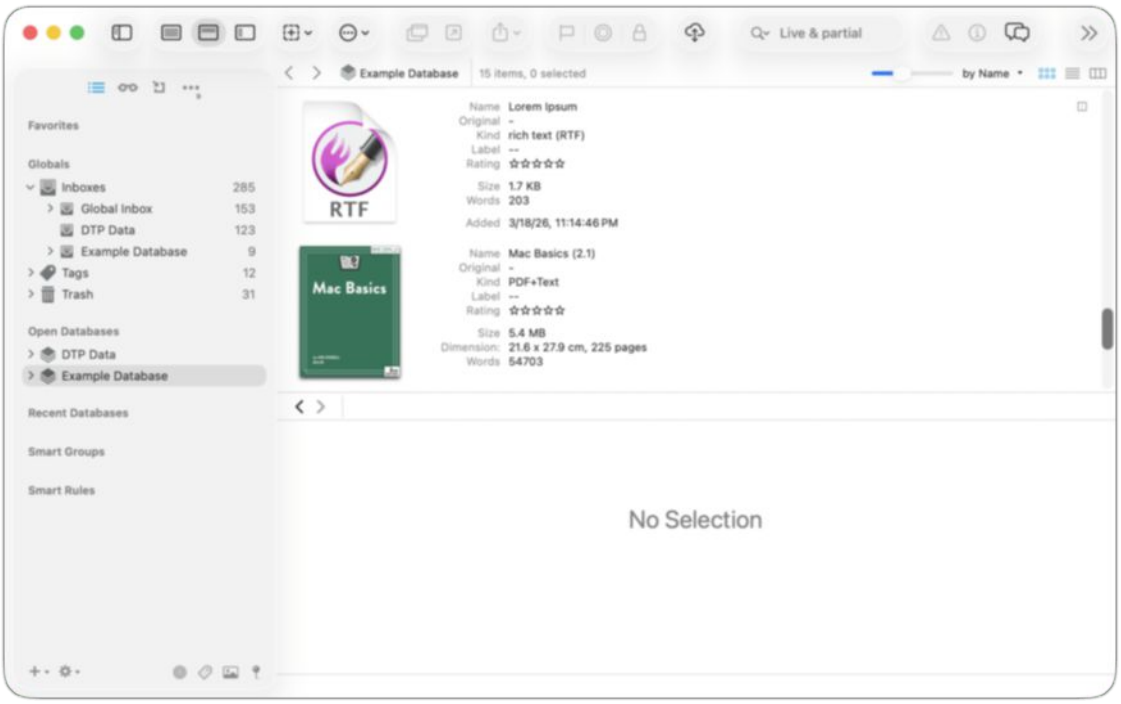

Figure 14: Show extra info in Icon view with the Show Details command.

View as List

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

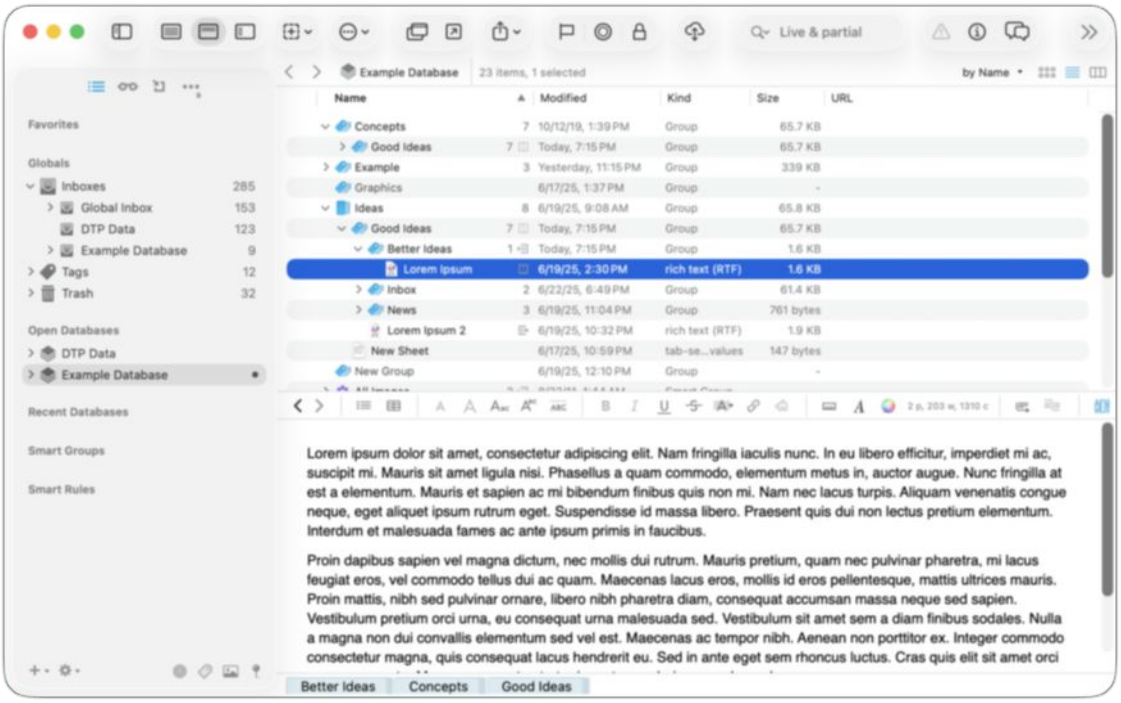

Figure 15: List view provides more (and configurable) detail about each item in your database, and lets you see the contents of groups at a glance.

A Word About Sort Order

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

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

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

View as Columns

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

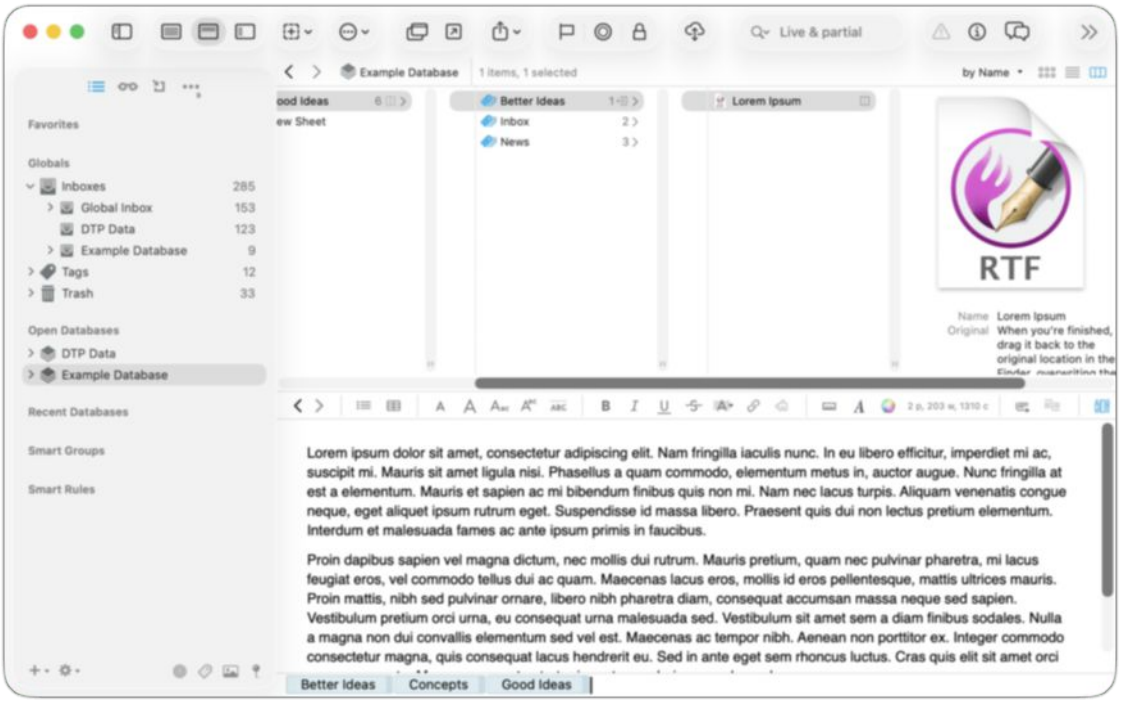

Figure 16: Navigate complex hierarchies quickly in Column view.

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

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

Identifying Unread, Duplicate, and Replicant Documents

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

- **Unread:** When a document name appears in bold and has a bullet ◉ in the Flag ⚑ column, it's marked as unread. (By default, documents are marked as read when you view them; to change this, go to Settings > General and uncheck "Automatically mark items as read." You can manually change the read/unread status with Data > Mark > As Read or As Unread.)
- **Duplicate:** By default, duplicates have a special icon (◫) next to their names. If you select "Mark duplicates and replicants in color" (Settings > General > Appearance), DEVONthink instead displays the name of each duplicate document in blue (omitting the icon), though you can select a different color if you prefer. Note that duplicates can have different names from each other.
- **Replicant:** By default, each replicant appears with an icon (⧉) next to its name. If you select "Mark duplicates and replicants in color" (in Settings > General > Appearance), DEVONthink hides the icon and displays the name of each replicant in red (and italics); again, you can select a different color. If you delete all but one replicant of a document, the remaining document's icon disappears (or its name reverts to black, as the case may be).

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

Path Bar

Just above the item list is a horizontal strip with two sections divided by a vertical line. The left-hand section is the *path bar*, which helps you navigate within your database. It shows the item currently selected in the sidebar and a "bread crumb" path of enclosing groups, if any. You can click any item in this path to jump to that group, right-click (or Control-click) it to see a contextual menu with Open and Reveal commands, or ⌘-click it to open it in a new window. There are also back ❮ and forward ❯ icons, which work like those in a web browser for

moving to previously viewed documents. (You can right-click, Control-click, or click and hold the icons to see a list of earlier or later locations; ⌘-click an item in the history list to open it in a new window.)

Information Bar

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

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

View/Edit Pane

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

As in the Finder, web browsers, and most document-based apps, the view/edit pane can have multiple tabs, each showing a different document. The tab bar is normally hidden if only one document is open; to display it all the time, go to Settings > General > Interface and check "Always show tab bar." Most controls for working with tabs (such as New Tab and Close Tab) are found on the Window menu.

You can drag tabs left or right to reorder them; scroll through a large number of open tabs; close a tab without switching to it first; and use the spring-loading effect (as in the Finder) to drag something onto a tab, wait until it opens, and then continue dragging it to a specific location.

To open multiple documents, each in its own tab, hold down Option and choose Data > Open In Tabs (⌘-Option-O). (If the view/edit pane is not visible when you use this command, DEVONthink opens a separate document window, with each document in a different tab.)

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

Widescreen

The *widescreen* preview option (View > Widescreen or ⌘-7), positions the view/edit pane on the right side rather than at the bottom. This arrangement makes more efficient use of screen real estate on large monitors (especially widescreen monitors). **Figure 17** shows a widescreen preview along with List view; compare with **Figure 15**, which shows the same thing with a standard preview.

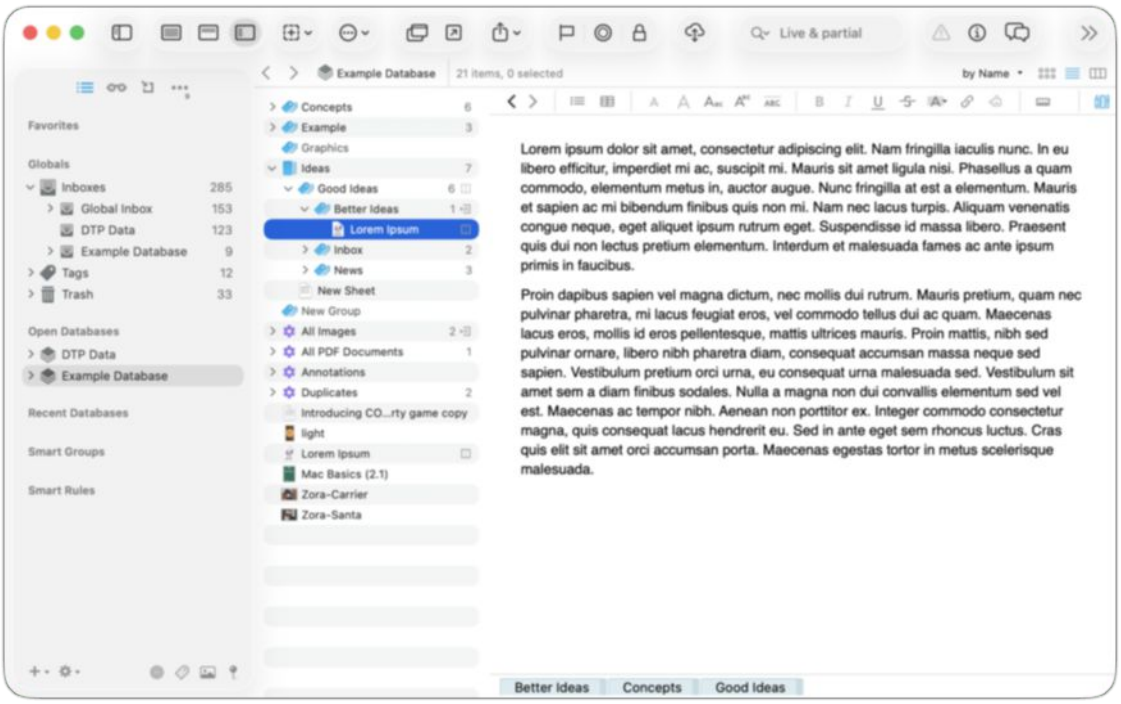

Figure 17: With the widescreen option turned on (as shown here with List view), DEVONthink positions the view/edit pane on the right rather than at the bottom.

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

Full Screen

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

Alternatively, you can use DEVONthink's *document-specific* Full Screen mode. When you choose View > Full Screen > Document (⌘-F7), the selected document fills your entire screen; in the case of plain text and rich text documents, your entire screen turns black by default while text becomes bright green (**Figure 18**). To leave Full Screen mode, press Esc.

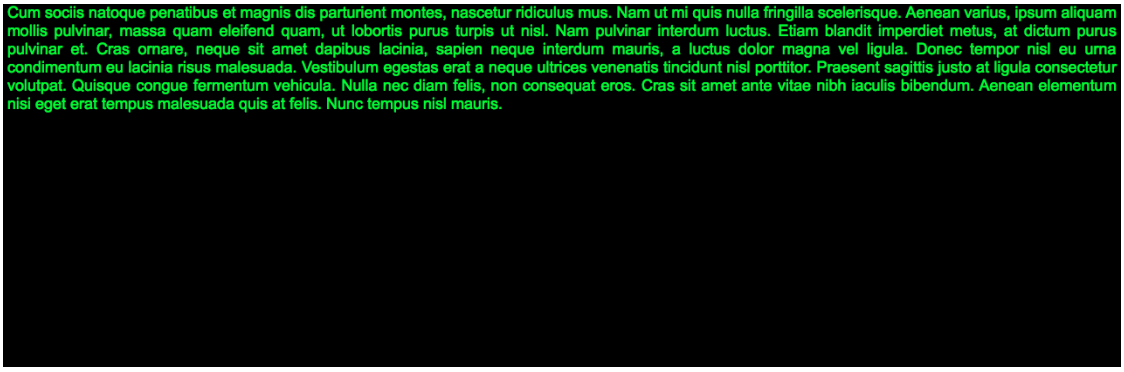

Figure 18: For minimalist text editing, choose Full Screen mode.

To adjust Full Screen mode's font, size, colors, and text width, go to Settings > Editing > Format and make changes in the Full Screen section at the bottom.

Navigation Bar

At the top of the view/edit pane is a narrow strip of controls called the *navigation bar* (**Figure 19**; also labeled ⑦ in **Figure 5**). The selec-

tion of controls on the bar varies according to what type of document (if any) is selected and its current state.

Figure 19: The navigation bar as it appears for a PDF document.

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

Tag Bar

Any document in a database can have one or more tags to help associate it with related content. One way to see those tags is to use the *tag bar* (**Figure 20**), which is labeled ⑧ in **Figure 5** (see Tag Documents for more). Group tags Good Ideas (that is, tags representing group names) show extra tabs on the right side; ordinary, non-group tags Language do not.

Figure 20: The tag bar can appear at the bottom of the window to enable you to view and edit tags.

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

Inspectors

Just as the sidebar pane appears on the left side of the window and may display any of several different sidebars, the inspector pane

(labeled ⑨ in **Figure 5**) appears on the right side of the window and may display any of eight main inspectors, depending on which icon is selected at the top. From left to right, they're the Info inspector, the Content inspector, the Document inspector, the Concordance inspector, the AI inspector, the Chat inspector, the Search inspector, and the Versions inspector. (The currently selected icon appears in blue.)

Most of the inspectors are subdivided into tabs—for example, the AI inspector has See Also, Tags, and Graph tabs. You can think of each tab as a separate inspector, and indeed, that's how they're referred to in DEVONthink's user interface and help. So, when I say "the See Also inspector," I really mean the See Also tab of the AI inspector, which you can jump to directly by choosing Tools > Inspectors > See Also (under the AI heading).

I describe each of the top-level inspectors ahead, as well as the extra-important See Also inspector.

Info Inspector

Besides listing statistics about the current document, this inspector (**Figure 21**) lets you adjust many kinds of metadata, grouped into four tabs:

- **Generic:** Among other things, rename the document; exclude it from chat and MCP, classification, See Also, search, tagging, and Wiki Linking; modify labels, ratings, flags, and tags; see and navigate to duplicates and replicants; add aliases; and lock or unlock the document. I discuss many of these activities elsewhere (such as Work with Metadata).

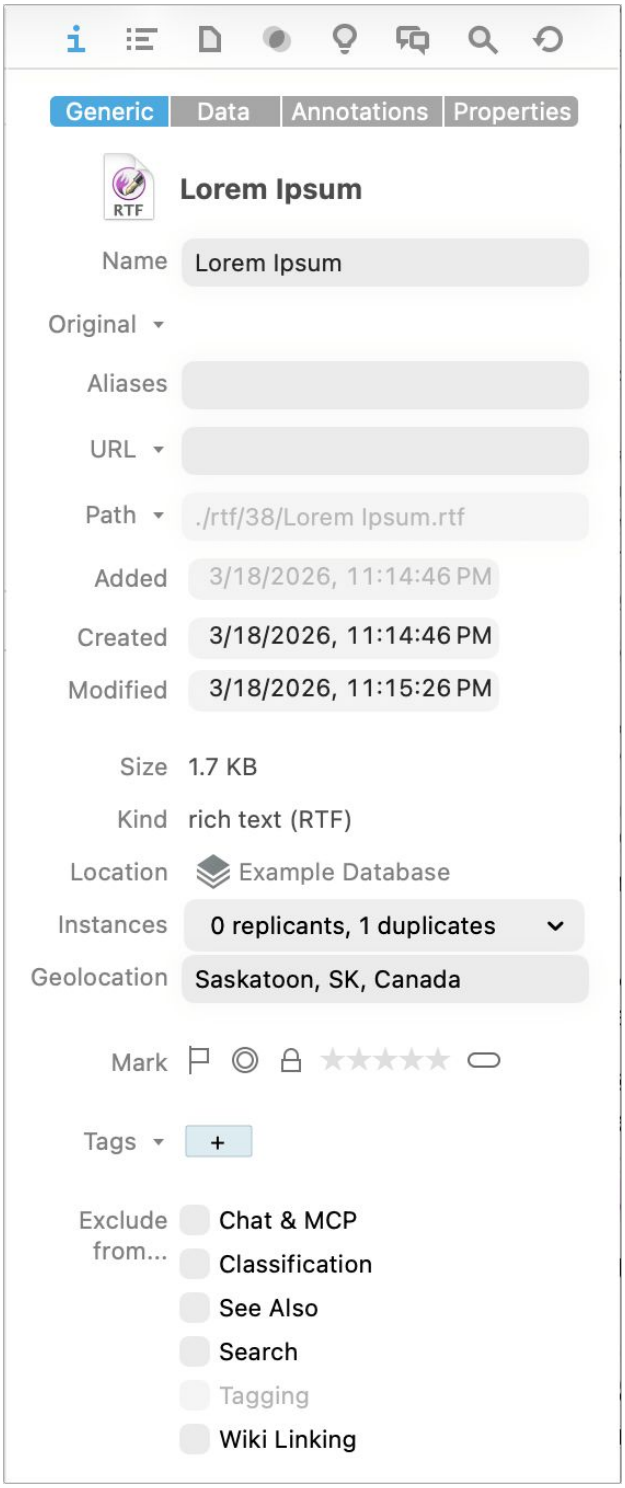

Figure 21: The Generic inspector lets you view and change numerous document characteristics.

- **Data:** Display and edit custom metadata (see Custom Metadata, later). It is available only in DEVONthink Pro and Server.
- **Annotations:** Set reminders (including alarms) about the current document (see Use Reminders), view or add Finder comments, and

add or edit annotations (separate files containing comments about this file; see Template).

In this context, an annotation is a text note you add to a document, group, tag, or other item. You can type your notes in the Annotations field here or in the field that appears when you choose Tools > Get Info (⌘-Shift-I) and click the Annotations tab. DEVONthink stores these annotations as separate documents (annotation files) that are linked to the originals; you can see them, for example, in the Annotations smart group at the top level of the database.

Note: DEVONthink also uses the word *annotation* to mean notes, shapes, and other extra-textual additions you add to PDFs or graphics and that appear within a document itself.

- **Properties:** View and edit metadata such as author, title, subject, and keywords.

If the inspector is hidden or displaying a different pane, you can also display the information from the Info inspector in a popover by selecting a document and choosing Tools > Get Info (⌘-Shift-I) or clicking the Info ⓘ icon on the toolbar. If you like, you can detach the Info inspector so it appears as a floating window: drag it by the "point" to do so.

Content Inspector

The Content inspector displays the table of contents for PDF, Markdown, and EPUB documents that include one (see Add or Edit a Table of Contents); it also shows thumbnails for PDF documents (**Figure 22**). Both the table of contents and the thumbnails are live, so you can click an item to navigate to that point in the selected document.

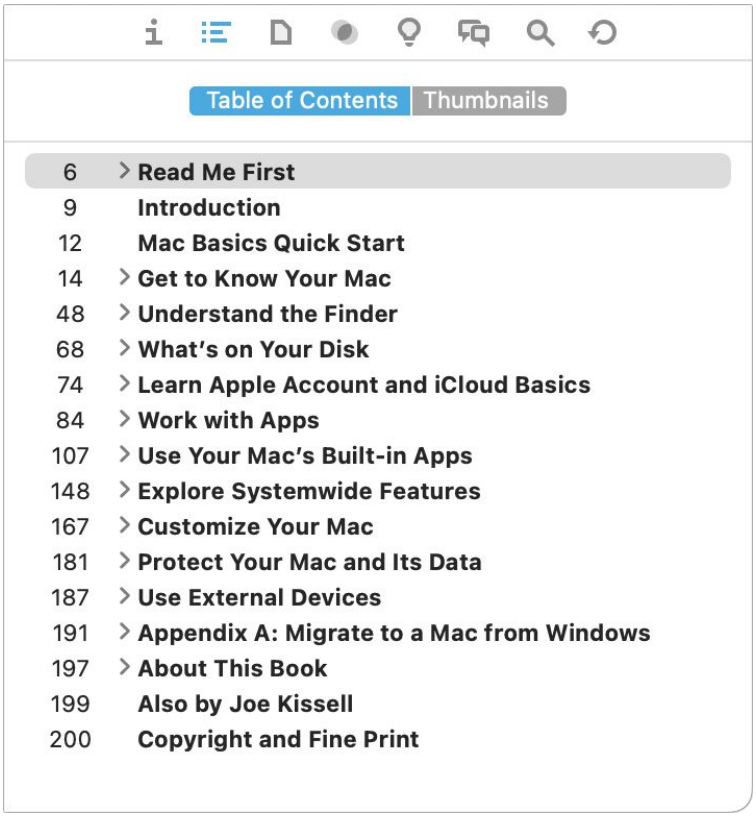

Figure 22: If your document contains a table of contents, you can view it (and navigate using it) in the Table of Contents inspector, part of the Content inspector.

Document Inspector

The Document inspector shows a wide variety of document-level metadata. The Annotations inspector, one of four tabs in the Document inspector, is shown in **Figure 23**.

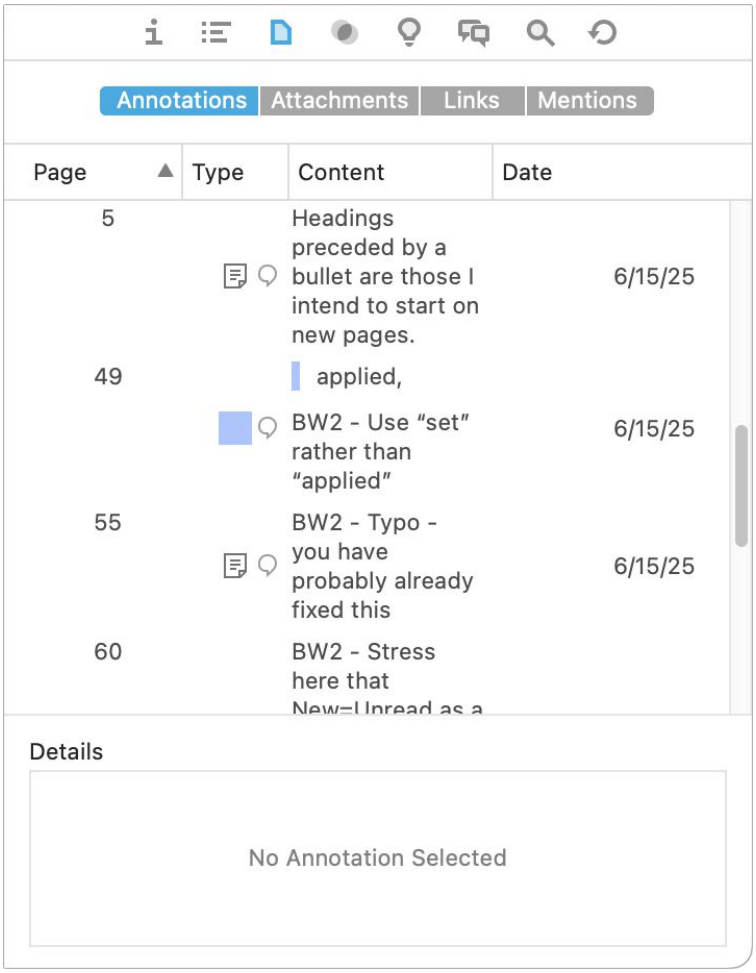

Figure 23: The Annotations inspector (part of the Document inspector) shows PDF annotations (and rich-text highlights), attachments, links, and mentions.

Here's what you find on the four tabs:

- **Annotations:** The Annotations inspector shows highlights in RTF files and PDF annotations (not to be confused with DEVONthink's annotation files).
- **Attachments:** The Attachments inspector displays attachments in files that support them.
- **Links:** The Links inspector shows any hyperlinks found in PDF and RTF files, as well as in web archives and other web-based documents (outgoing links are found at the top under the Links heading, while incoming links are found at the bottom under the Incoming Links heading; see Work with Item Links and WikiLinks for more on using links).

- **Mentions:** The Mentions inspector shows other documents that mention this one (by including this document's name, prepended with an @ sign, somewhere in the text).

Concordance Inspector

Do you wonder whether you're overusing certain words, or are you curious about how often certain terms in a document occur relative to other terms? Select the document and choose Tools > Inspectors > List. The List inspector (**Figure 24**) shows a concordance: every word in your document by frequency—the number of times they occur.

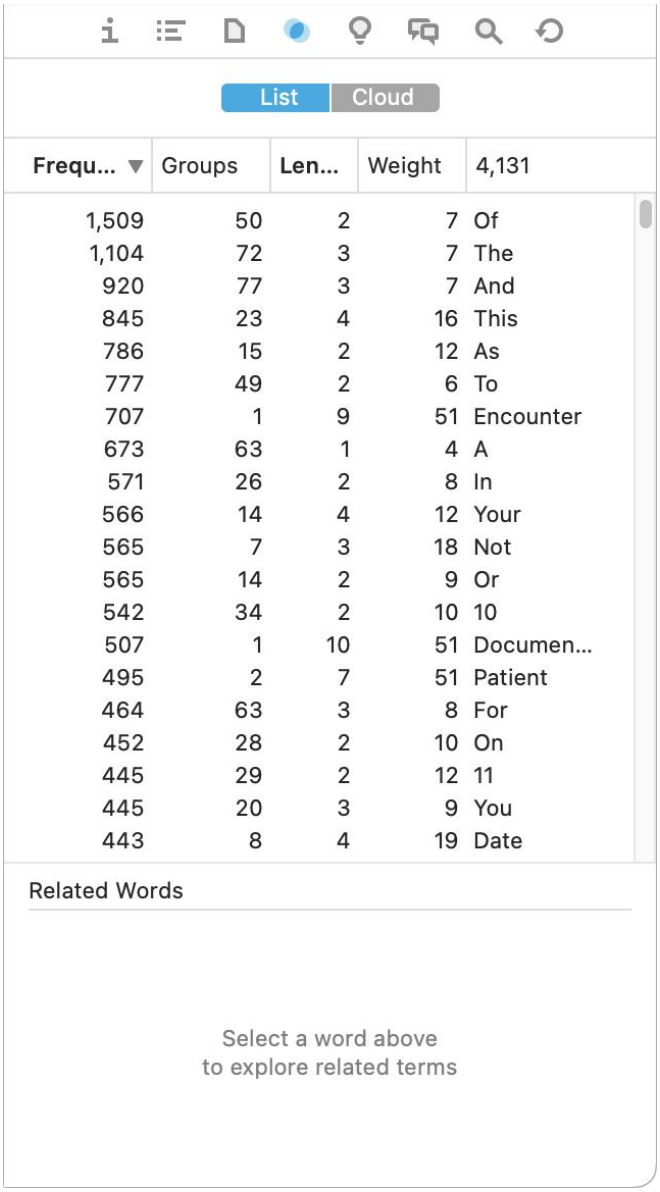

Figure 24: The List tab of the Concordance inspector shows all the words in your document, sorted by frequency.

I discuss the Concordance in more detail later, including how to use the feature across multiple documents—or even an entire database—and the Cloud option (see Search Using the Concordance).

Note: The Concordance appears only in the Pro and Server versions of DEVONthink 4.

AI Inspector

The new AI inspector, which refers to DEVONthink's *built-in* artificial intelligence features, is divided into three tabs: See Also, Tags, and Graph:

- **See Also:** One of DEVONthink's coolest and most powerful features is found in the See Also inspector. The See Also and Classify features use AI to help you determine where a document should go and what other documents may be related to it, displaying their results here.

  To open this inspector (**Figure 25**), select a single document and then choose Tools > Inspectors > See Also (Control-S). You can use the controls just under the search field to choose whether the analysis is done by content or (if applicable) by tags, and whether it's confined to the current database. The next portion of the inspector lists groups that may be a good place to store the document. The bottom portion lists other documents that have similar contents to the one you've selected. I discuss these features further in Classify Documents.

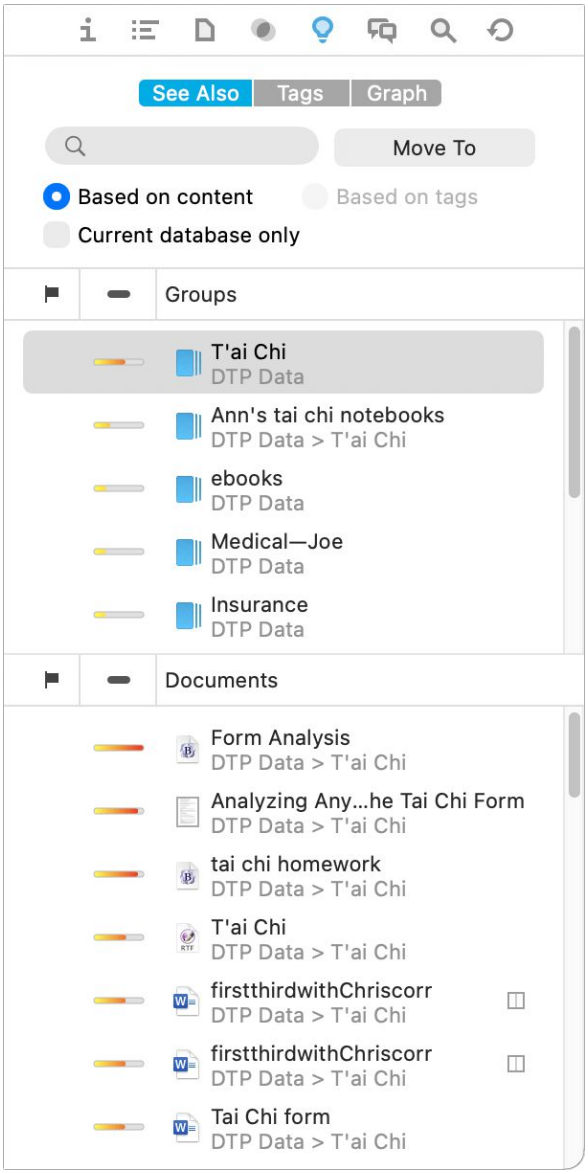

Figure 25: The See Also inspector helps you move documents to their proper home and find related documents.

- **Tags:** The Tags inspector (Tools > Inspectors > Tags) is new in DEVONthink 4 (**Figure 26**). Apart from showing the tags already applied to a document and a field in which you can manually enter new tags, it proposes new tags in gray with a dotted outline that you may want to add to the document. To add all suggested tags, press Control-A. (See Use the Tags Inspector for more information.)

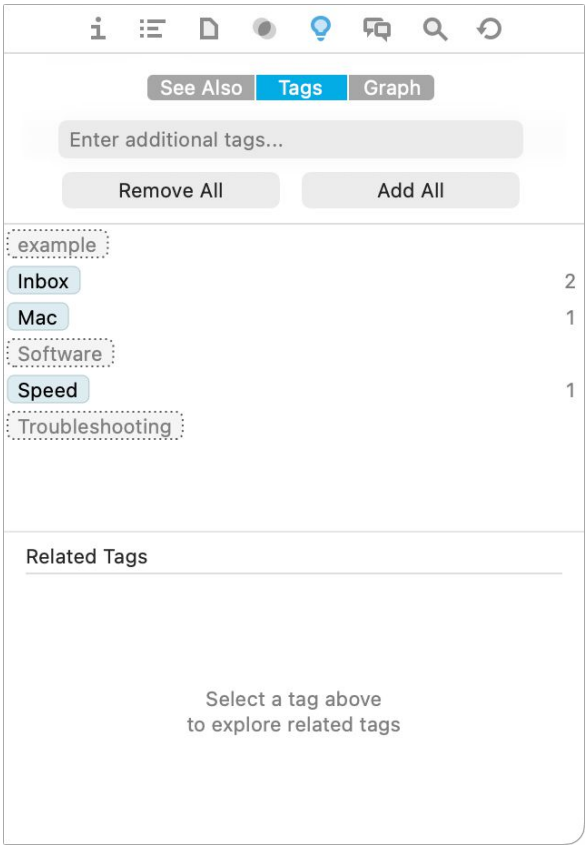

Figure 26: The Tags inspector proposes new tags for documents.

Note: Unlike the Data > Tags > Add Chat Suggestions to Documents command (in DEVONthink Pro and Server), this inspector uses DEVONthink's built-in AI tools to suggest tags.

- **Graph:** Click the Graph tab or choose Tools > Inspectors > Graph (Control-G) to show a map representing how this document connects to other documents in your database. Or choose Tools > Graph to display the graph in a floating popover.

Chat Inspector

As an alternative to the standalone chat window, the Chat inspector (Tools > Inspectors > Chat, **Figure 27**) lets DEVONthink Pro and Server users interact with their favorite LLM (see Chat with AI).

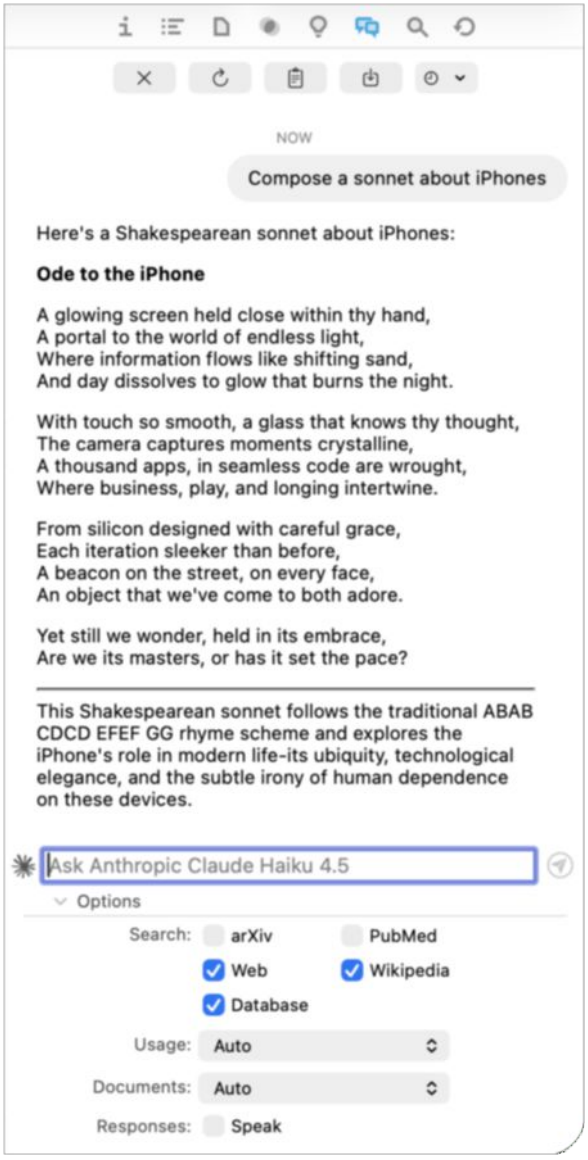

Figure 27: If you've had enough of old-fashioned, human-composed poetry, the Chat inspector can write a sonnet about your iPhone.

Search Inspector

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

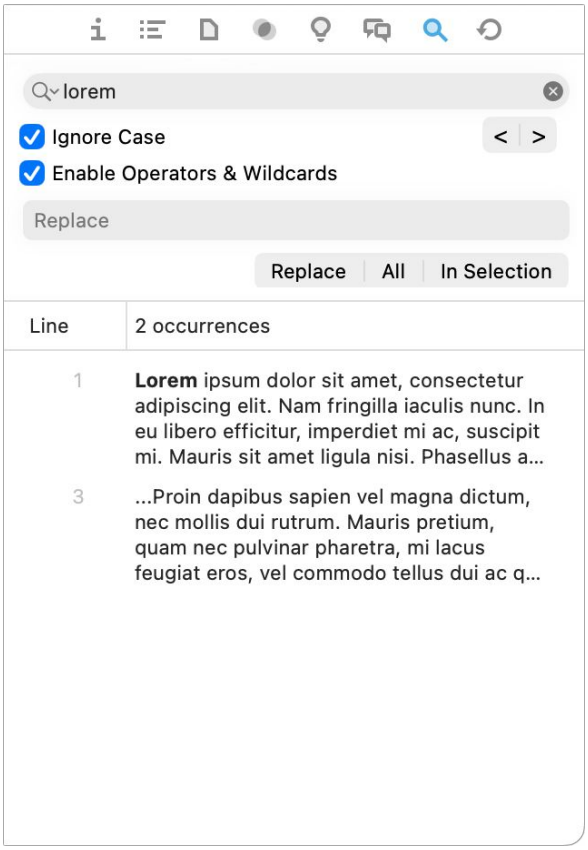

Figure 28: The Search inspector lets you do simple searches and replacements within the selected document.

Versions Inspector

With DEVONthink's versioning feature enabled, after you modify a document, consult the Versions inspector (Tools > Inspectors > Versions, **Figure 26**) to see and restore previous versions. See Use Versioning for more details.

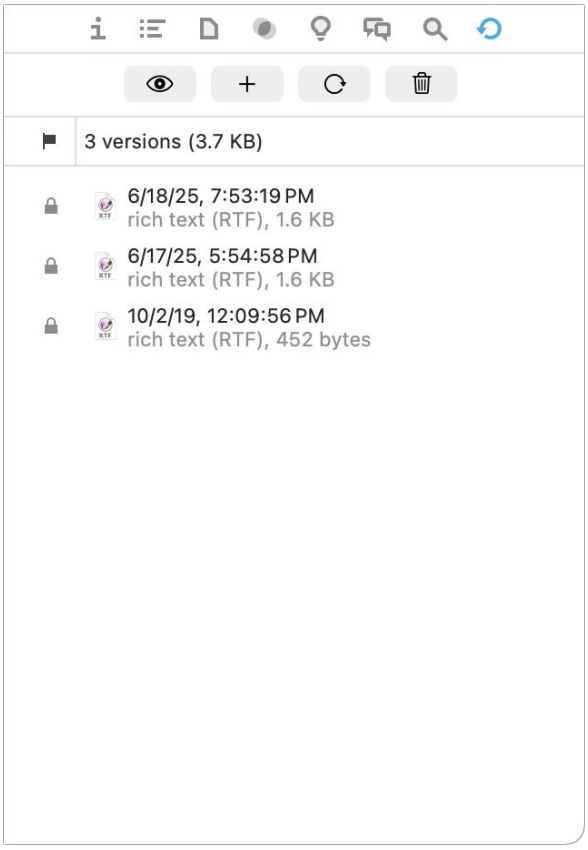

Figure 29: The Versions inspector shows previous versions of your document.

Panels

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

Activity

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

- When you sync your database with another location (see Sync DEVONthink Databases), the Activity panel shows you the syncing progress. (If you're syncing directly between two Macs, it appears on both.) Ordinarily it disappears when the sync is complete.

- In DEVONthink Pro or Server, when you choose Data > OCR > “to searchable PDF” (or configure the app to perform OCR automatically on newly scanned documents), the Activity panel appears, showing the progress of each document as it is recognized and any documents waiting for their turn.

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

Download Manager

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

To open this window, choose Window > Download Manager.

Log

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

Note: The log can also appear in a popover when you click the Log icon on the right side of the toolbar.

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

Document Windows

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

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

To open a document window, double-click any document (or choose a command from the Data > New submenu to create a new one from scratch). The appearance of the window and the controls available on the toolbar vary according to the type of document you're editing. For example, **Figure 30** shows the window for a rich text document.

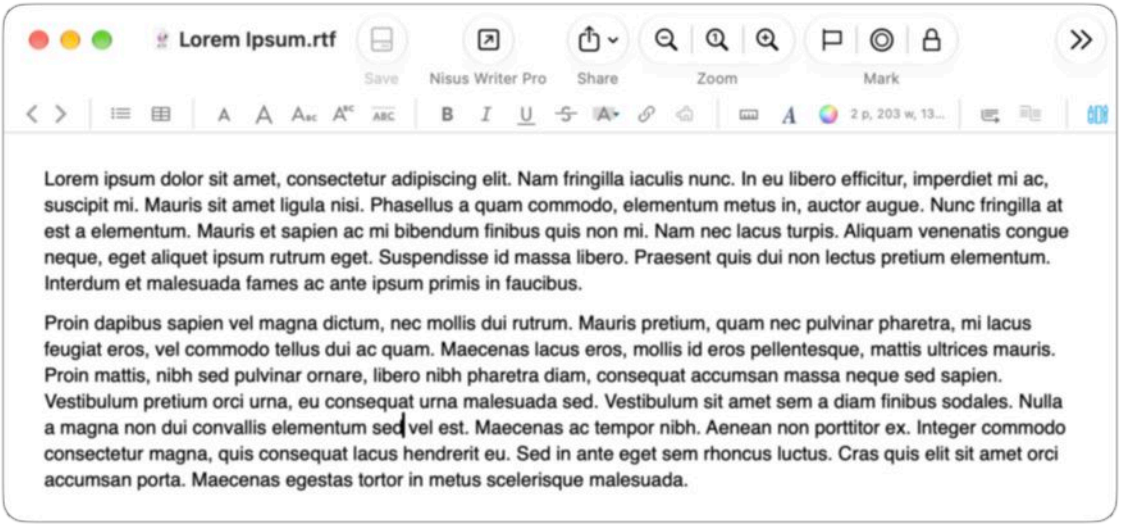

Figure 30: When you open a document in its own window, you get more room to work—plus a separate (and customizable) toolbar.

Inboxes

The next-to-last item I want to introduce you to on this interface tour is the inbox, which as I've already mentioned is meant as a storage

place for newly imported or indexed documents you haven't yet sorted. In this respect it's rather like the inbox in your email app. (Just as I recommend trying to keep one's email inbox mostly empty, most of the time, I recommend the same for DEVONthink—the app is much more useful and effective when you group, or at least tag, each document.)

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

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

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

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

Workspaces

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

Here's what you can do with workspaces:

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

Widgets

You can now add Reading List, Favorites, Workspaces, or Tips widgets to your Mac desktop. Each comes in a choice of four configurations. Right-click (or Control-click) on the desktop, choose Edit Widgets from the contextual menu, and then scroll or search for DEVONthink. Drag the widget you want to your desktop.

Set Up DEVONthink Databases

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

Create a New Database

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

To create a database:

1. Decide whether you want your database to be encrypted. (See the sidebar Encrypting a Database, ahead, for guidance.)
2. Choose File > New > Encrypted Database (for an encrypted database) or File > New > Database (for an unencrypted database). A file dialog appears.
3. Enter a name for your database and choose a location (or accept the default location, which is `~/Databases`). Note that DEVONthink expressly prevents you from storing your database in any cloud-synced location, such as Dropbox or iCloud Drive (including the Desktop and Documents folders, if you sync those via iCloud), because such locations aren't safe to use with databases. You can, however, *sync* your databases via Dropbox or iCloud Drive; see Sync DEVONthink Databases.

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

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

6. Click Create.

DEVONthink creates a new, empty database.

Encrypting a Database

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

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

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

How Many Databases Do You Need?

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

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

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

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

Configure Database Properties

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

The Database Properties popover (**Figure 31**) appears. The lower portion of this popover contains statistics—the number of items of different sorts that appear in your database.

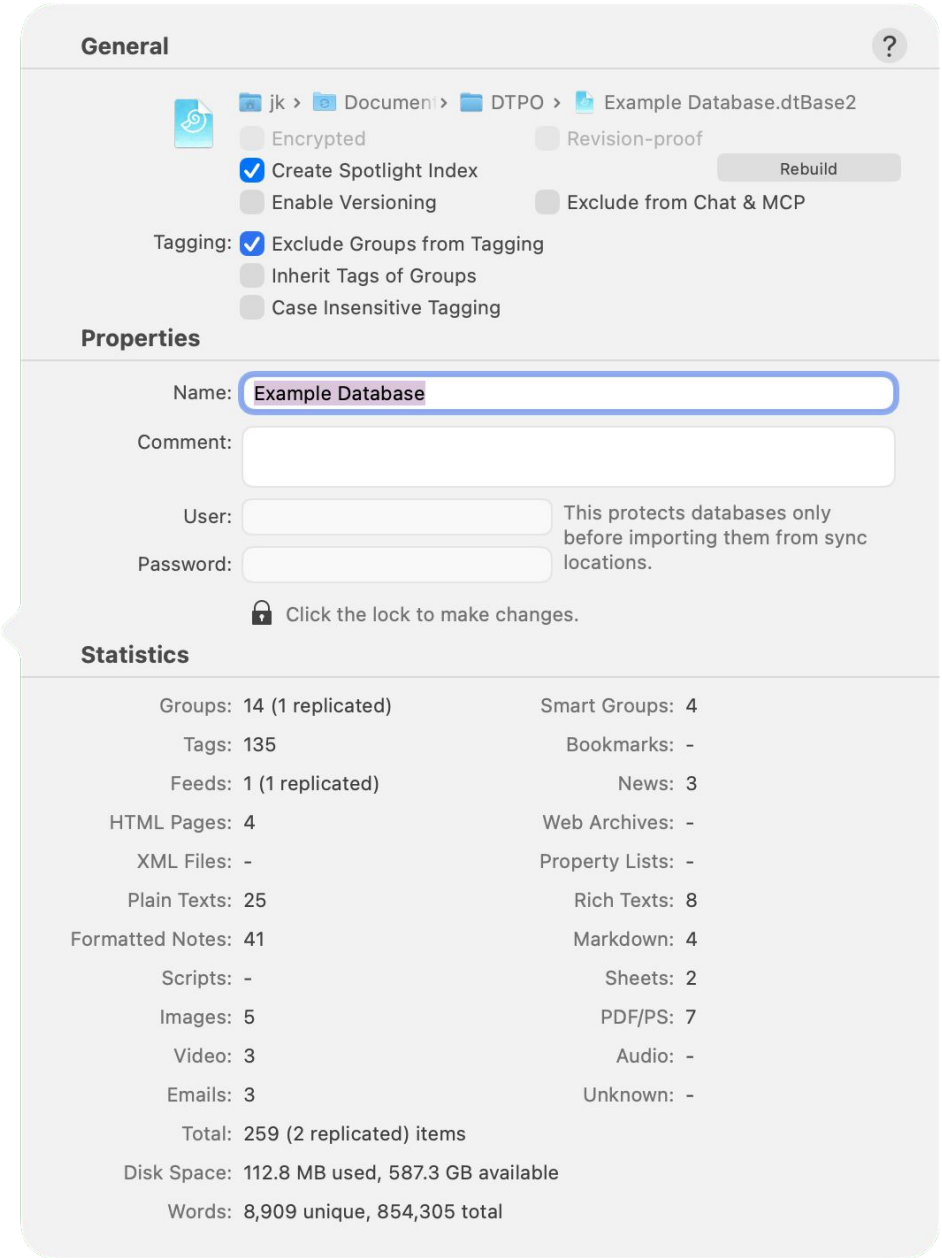

Figure 31: Set database properties in this popover.

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

- **Create Spotlight Index:** DEVONthink always indexes your database internally. But if this box is checked (as it is by default), DEVONthink makes the database contents available in your systemwide Spotlight index too.

> **Tip:** Starting with version 4.1, DEVONthink includes a Quick Look plugin that lets you preview several types of DEVONthink documents by pressing Space when they appear in Spotlight search results.

- **Enable Versioning:** With this selected, DEVONthink stores older versions of each file. See Use Versioning for details.
- **Exclude from Chat & MCP:** To make the entire database invisible to generative AI features, including chat and the built-in Model Context Protocol (MCP) server, select this checkbox.
- **Rebuild:** To rebuild the database's Spotlight index (not the database itself), click Rebuild. This may be necessary if searches fail to return obvious document matches.
- **Exclude Groups from Tagging:** When this checkbox is selected (as it is by default for new databases), groups and tags are independent from each other in that database. This means, for example, that group names won't appear as auto-complete choices when you enter tags, though DEVONthink does not prevent you from manually creating a new tag with the same name as a group.

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

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

- **Inherit Tags of Groups:** When this is selected, any tags applied to a group are also applied to children (sub-groups) of that group.
- **Case Insensitive Tagging:** When this is deselected, you can have multiple tags that differ only in capitalization (like `recipes` and `Recipes`) but are nevertheless treated differently. When this is selected, DEVONthink prevents you from having tags that vary only in capitalization.
- **Name:** To rename your database, type a new name here. This changes the name as it appears both in DEVONthink and in the Finder.
- **Comment:** Enter any descriptive notes about the database as a whole here; when exporting files, these comments are used as the Finder's Spotlight Comments.
- **User and Password:** To require a username and password when syncing a database, click the padlock icon so it changes to unlocked. Enter a username and password in the fields provided and click the padlock icon again to lock it. (To remove password protection, repeat the procedure but leave the Password field blank.) But note that this is weak protection that affects only syncing, and is independent of whether you've encrypted the database.

Tip: You can also change the icon of your database in this popover, just as you would in a Finder Get Info window.

How and Where Databases Are Stored

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

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

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

Use Revision-Proof Databases

New in DEVONthink 4 is support for "revision-proof" (formerly called "audit-proof") databases, which is to say databases that would pass an audit. Such databases may be useful for legal or financial reasons when every precaution must be taken to avoid changes to your data and to record additions and deletions.

In a nutshell, that means revision-proof databases:

- Are encrypted
- Lock all newly added items so they can't be changed
- Permit you to delete items only after unlocking them
- Track all additions and deletions

You can't create new documents from within a revision-proof database (though you can add documents created elsewhere), make annotations, perform OCR, add imprints, update RSS feeds or captured webpages,

or index external items, and versioning is unavailable since files can't be modified.

On the other hand, you're permitted to create groups and smart groups, to lock or unlock smart groups as needed, and to move, copy, and replicate items in the database.

To create a revision-proof database, choose File > New > Revision-Proof Database. As with an encrypted database, select a name and location and enter (and confirm) a password.

To audit a revision-proof database—that is, to see a complete record of everything added or deleted and all other changes made—choose File > Export > Database Audit Report, which produces a CSV file you can save outside DEVONthink. Or, to create a tabular audit report of selected items only that appears inside DEVONthink, choose Tools > Create Audit Report.

Get Information into DEVONthink

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

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

What Can I Put in DEVONthink?

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

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

Decide Where Your Documents Will Go

As you use DEVONthink, you can put each document in a specific group, in a catch-all inbox—perhaps in any of several databases—or in the global Inbox. For the most part, you get to choose where docu-

ments go, although there are cases in which you may not have realized what your choice was, so the result may be confusing if you're not familiar with DEVONthink's system.

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

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

When you create a new document from *within* DEVONthink—and that includes importing or indexing documents using commands on the File > Import menu or the File > Index Files and Folders command—it goes in the currently selected group, if any; if a tag is selected, or if no group is selected, it goes to the inbox of the selected database. In other words, documents created from within DEVONthink are always in the "where you put them" category.

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

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

To choose your default destination, go to Settings > Files > Import and set the Destination setting to one of these:

- **Global inbox:** Everything you import or index goes straight to the global Inbox, no questions asked. This is the default.
- **Select group:** If you select this radio button, the next time you import or index something starting from outside DEVONthink, a special panel appears (**Figure 32**), allowing you to select the location of your choice (and optionally add tags). You can also click

New Group to create a new group and put the document there; if you're unsure where to put it, select your global Inbox or a database-specific inbox.

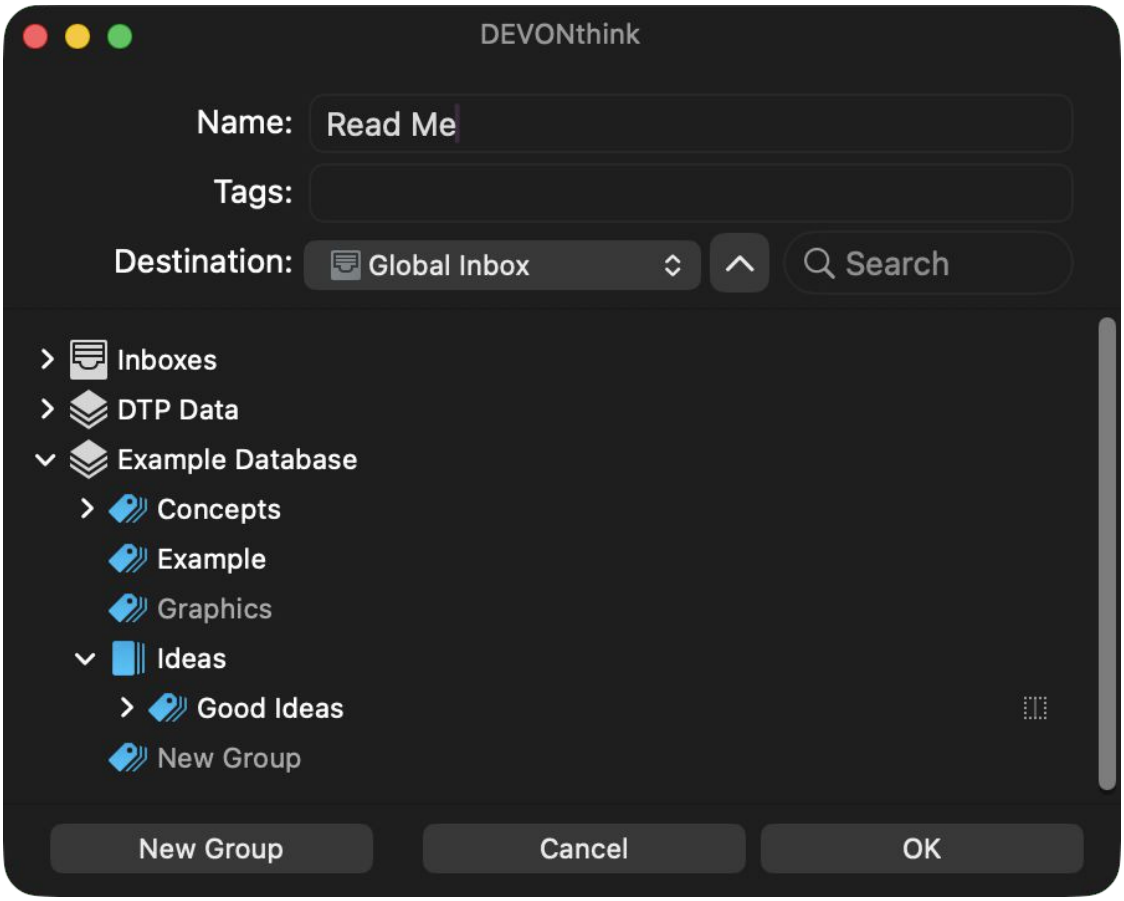

Figure 32: This panel appears when Select Group is your default destination and you add something from outside the app.

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

Stepping Stone: Sort Now or Sort Later?

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

There are two basic approaches:

- **Sort now:** Set your default Destination to Select Group, and sort every item as you import it. The advantage is that DEVONthink's inboxes won't get cluttered, and you'll never have to confront hundreds or thousands of documents in need of a proper destination. In addition, you'll be able to find things faster (even without searching), and Classify will work better. But the downside is that the Groups panel will keep popping up, interrupting your work—and if you end up dealing with this by selecting Inbox every time, you might as well change your preferred destination to the global Inbox.
- **Sort later:** A more Zen-like approach is to toss everything into your inbox (global or otherwise) and not worry about it. After all, DEVONthink has excellent search capabilities, not to mention the Group Similar Items and Classify commands, which can help you sort a large backlog of documents in a hurry. This approach isn't for neat freaks, as it requires a certain tolerance for messiness and ambiguity, and a willingness to search for almost everything you need.

Having tried both, my personal feeling is that the interruption of the Groups panel is more irritating than inbox clutter, so I tend to sort later.

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

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

- **Start in DEVONthink:** You can create several kinds of documents without ever leaving DEVONthink (see "Create Documents in DEVONthink," just ahead); you can also ask DEVONthink to grab files stored elsewhere on your Mac (see Use the Import or Index Command). You can even Use the Built-in Web Browser and Read RSS Feeds.
- **Start in another app:** Whether it's a file in the Finder, a text selection in a word processor, a page in a web browser, or a message in Mail, you can add info from just about any other app to DEVONthink (in some cases, even if DEVONthink isn't running). See Use Drag and Drop, Use the Systemwide Global Inbox, Use the Services Menu, Use the Sorter, Web Bookmarklets, Add Email Messages, and Use the PDF Menu.
- **Start with your scanner:** You may be able to touch a button on your scanner to scan a document and import it directly into DEVONthink (see Scan Documents, which also discusses other ways of getting scans into your database).

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

Create Documents in DEVONthink

Many people use DEVONthink primarily as a place to store documents that originated elsewhere, but you can also generate many types of documents without leaving the app. If you're using DEVONthink to take notes, perform research on the web, or brainstorm ideas for your

next novel, it's more efficient to create your documents within DEVONthink than to create them elsewhere and import them.

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

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

With Clipboard

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

Tip: You can also find the commands from the Data > New submenu on the toolbar's New pop-up menu.

Plain Text

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

Rich Text

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

Formatted Note

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

Markdown Text

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

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

HTML Page

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

Sheet

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

To create a sheet:

1. Choose Data > New > Sheet.
2. In the dialog that appears (**Figure 33**), optionally fill in a name for the sheet as a whole at the top. Then type a name for your first column and press Return.

Figure 33: Add columns to a new sheet in this dialog.

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

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

The newly created sheet (**Figure 34**) is initially empty, with a single blank row. You can begin typing immediately to fill in data. To add a new record (row), choose Tools > Sheets > New Record or click the New Record icon on the editing bar. To add or remove columns or rows, use the other (self-explanatory) commands on the Tools > Sheets menu or the corresponding editing bar icons.

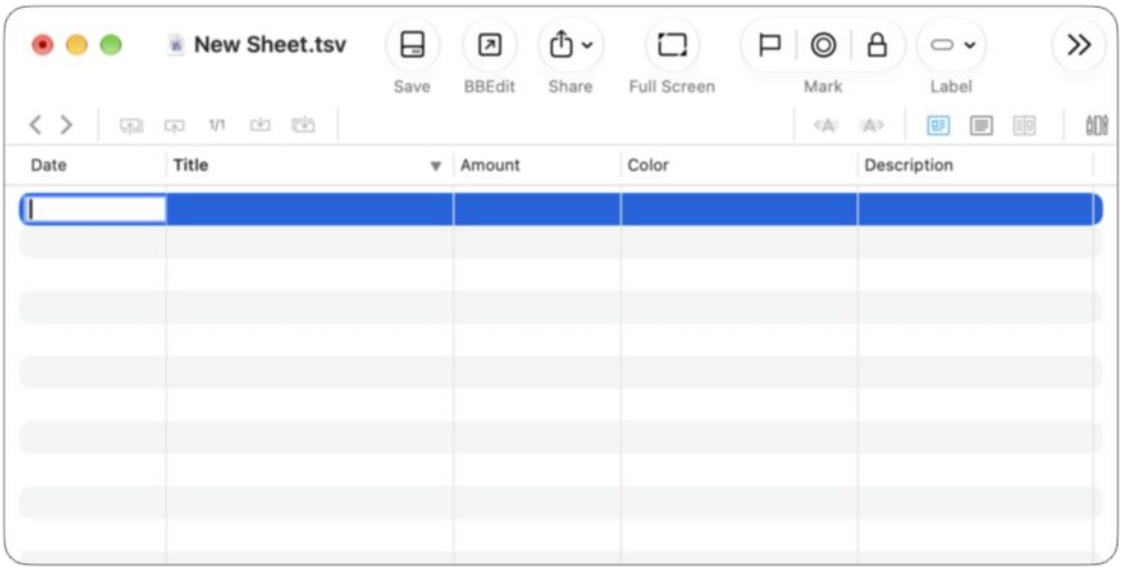

Figure 34: A new sheet with just one blank record added.

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

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

DEVONthink Pro and Server offer another way to view and interact with sheets: *form view*, which shows a single record in a form-like layout (**Figure 35**), which you may find friendlier and more convenient for data entry. To switch to form view, choose View > Document Display > Form View or press ⌘-Control-X. (To switch back to table view, choose View > Document Display > Table View or press ⌘-Control-P.)

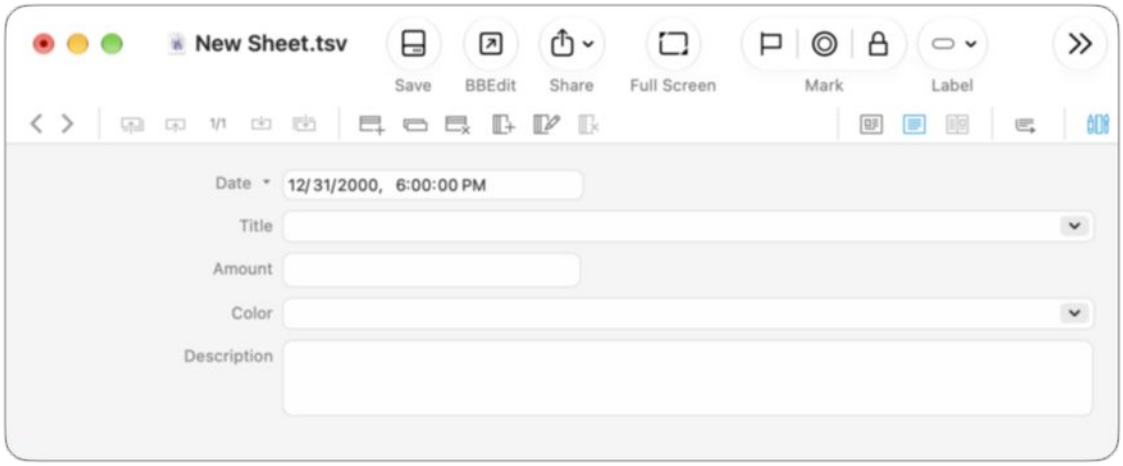

Figure 35: This is the same sheet as in the previous example, but shown in form view.

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

Template

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

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

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

For example, if you choose Data > New from Template > Productivity > Phone Note, DEVONthink displays a window like the one in **Figure 36**. Notice that in addition to the boilerplate text, it has the date and time it was created and fields to fill in other details. All these were provided by variable codes in the template file.

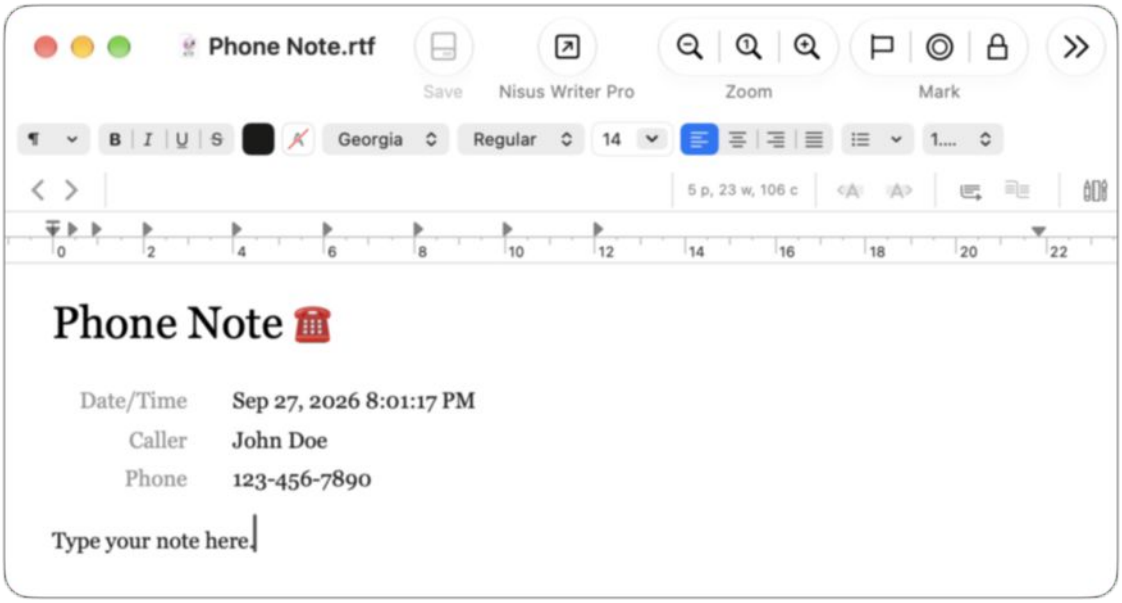

Figure 36: A new phone note has the date and time prefilled.

To edit an existing template:

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

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

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

4. In the folder corresponding to your language (for example, `English.lproj`) is a `.rtf` file with the template's name. Double-click that file to open it in TextEdit (or whatever app you've configured as the default for editing `.rtf` files). Then you can edit it just as any other document (see **Figure 37**).

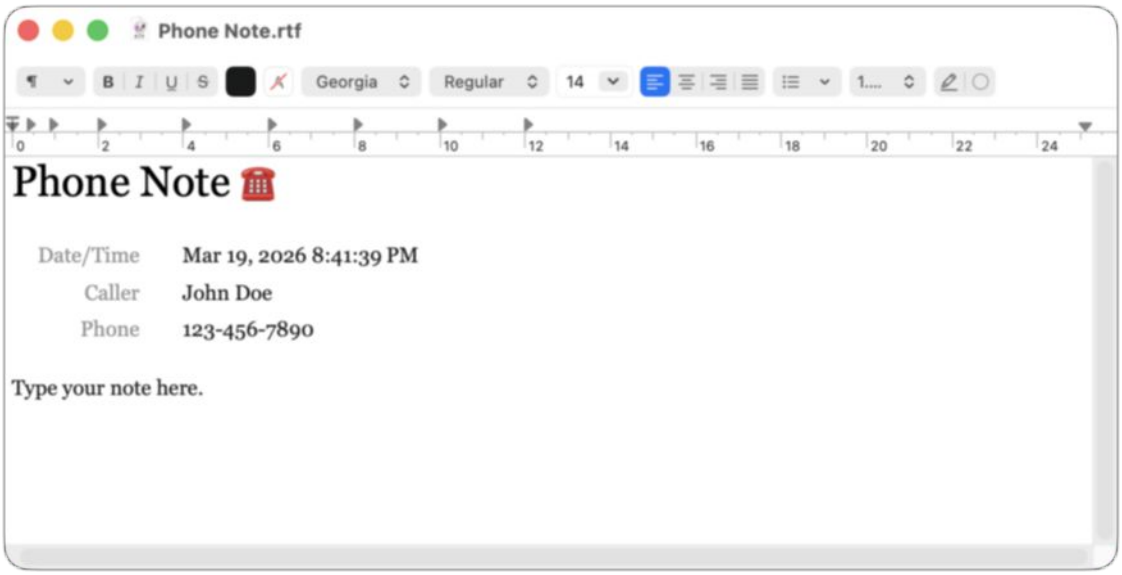

Figure 37: The template from the previous figure, open for editing as an RTF document in TextEdit. Notice the `%date%` and `%time%` placeholders.

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

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

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

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

Using Placeholders

DEVONthink uses special variables called placeholders to represent spots in templates (and other contexts) where information should be filled in dynamically. For example, in **Figure 37** above, the placeholders `%date%` and `%time%` are replaced with the current date and time, respectively, when you create a new document from this template. DEVONthink supports over 20 template placeholders, all of which take the form of a word surrounded by percent (`%`) symbols. See the topic "Template Placeholders" on the "Smart Templates" page of the DEVONthink documentation for details.

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

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

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

Use the Import or Index Command

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

Import

To import files and folders, do the following:

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

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

> **Note:** There are several other commands on the File > Import submenu, designed for handling specific kinds of data. I discuss some of these commands elsewhere in this book.

Index

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

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

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

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

Use Drag and Drop

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

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

- **Dock icon:** Drag something to DEVONthink's Dock icon to import it to your default location.
- **A group or tag:** Drag something to any group or tag in a visible DEVONthink window to add it to that group or apply that tag. Keep in mind that if you drag something from outside DEVONthink to an ordinary tag (not a group tag), the item is stored in the database's inbox.
- **The DEVONthink window:** You can drag items directly into the main DEVONthink window—for example, drop items on any inbox, database, group, or tag in the sidebar or in any view. When you drag something into the DEVONthink window and your pointer is over a valid target area, that portion of the window is outlined in blue and your pointer acquires a green plus badge.
- **The Sorter:** DEVONthink has an optional window called the Sorter that can take the form of a menu extra on your main menu bar or a slide-out panel with an onscreen control called a docked tab. When the Sorter is visible, you can drag items onto any database, group, or tag in it. See Use the Sorter for details.

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

the Finder, which is roughly analogous to what you do when you index a file in DEVONthink.)

Import, OCR, and Delete

It's also possible to automatically import a file, perform OCR on it, and delete the original—all in a single step! The easiest of several ways to do this uses a smart rule (see Work with Smart Rules for details).

To set this up, start by indexing the folder in the Finder where you'll put documents you want to perform OCR on, and create a destination group for the final product within DEVONthink. Then set up a smart rule as shown in **Figure 38**.

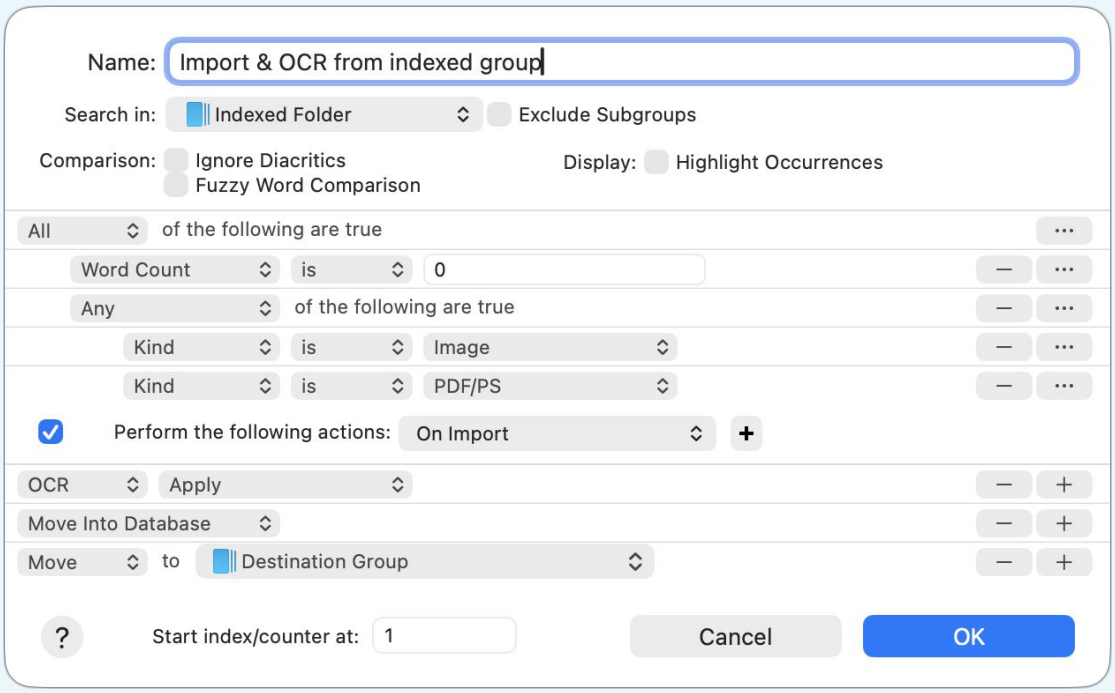

Figure 38: *This smart rule runs OCR on anything you drag into the indexed folder, then moves that item into your database.*

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

Use the Systemwide Global Inbox

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

The systemwide global Inbox isn't installed automatically. If you didn't opt to install it when you first ran DEVONthink, choose DEVONthink > Install Add-ons, check Global Inbox in Save Dialogs, and click Install. Thereafter, you should see an Inbox icon in the sidebar of Finder windows under Favorites (**Figure 39**). If you prefer, you can drag it to a different location within the Favorites group.

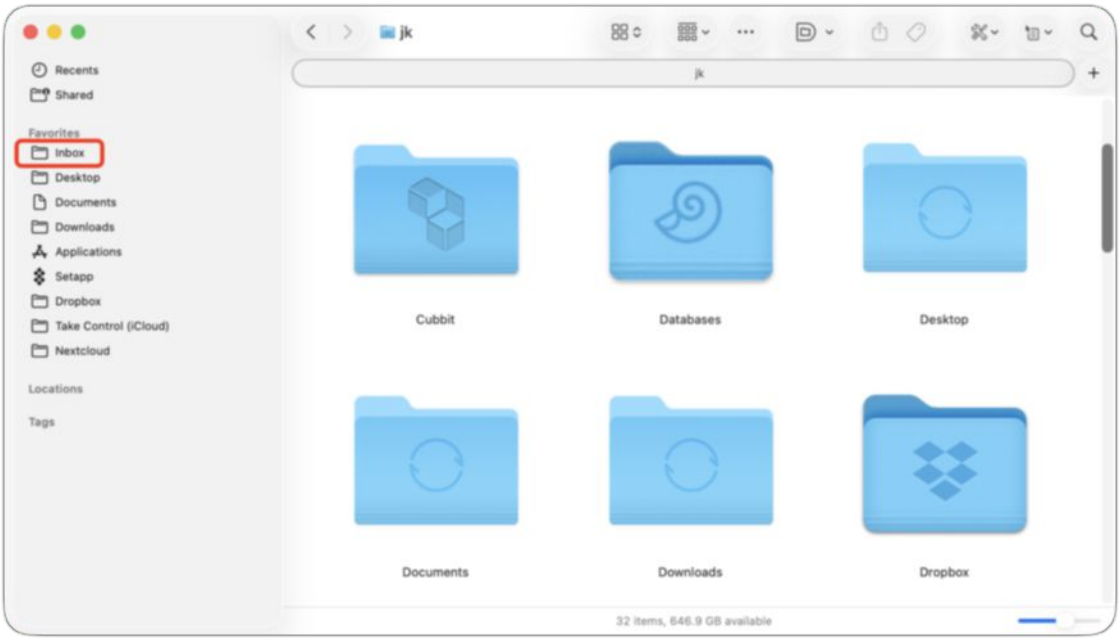

Figure 39: Your systemwide global Inbox (shown here circled in red) appears in the sidebar in your Finder windows.

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

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

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

- When you drag something to the systemwide global Inbox, you *move* that file or folder to DEVONthink rather than just copying it; the original disappears. (To force a copy instead, hold down Option as you drag; to force an index rather than an import, hold down ⌘ and Option.)
- Dragging to the systemwide global Inbox icon always puts the item(s) in DEVONthink's global Inbox, regardless of your settings for how imports are usually handled. Items dragged to this icon never prompt you to select a group.
- If DEVONthink is running, the systemwide global Inbox icon essentially functions as a one-way drop box—it always appears empty, because it sends everything you put in it directly into your global Inbox. If DEVONthink isn't running, it acts as a regular folder; you can drag things out of it later if you wish.

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

The systemwide global Inbox also appears in the sidebar of every app's standard Save dialog (**Figure 40**).

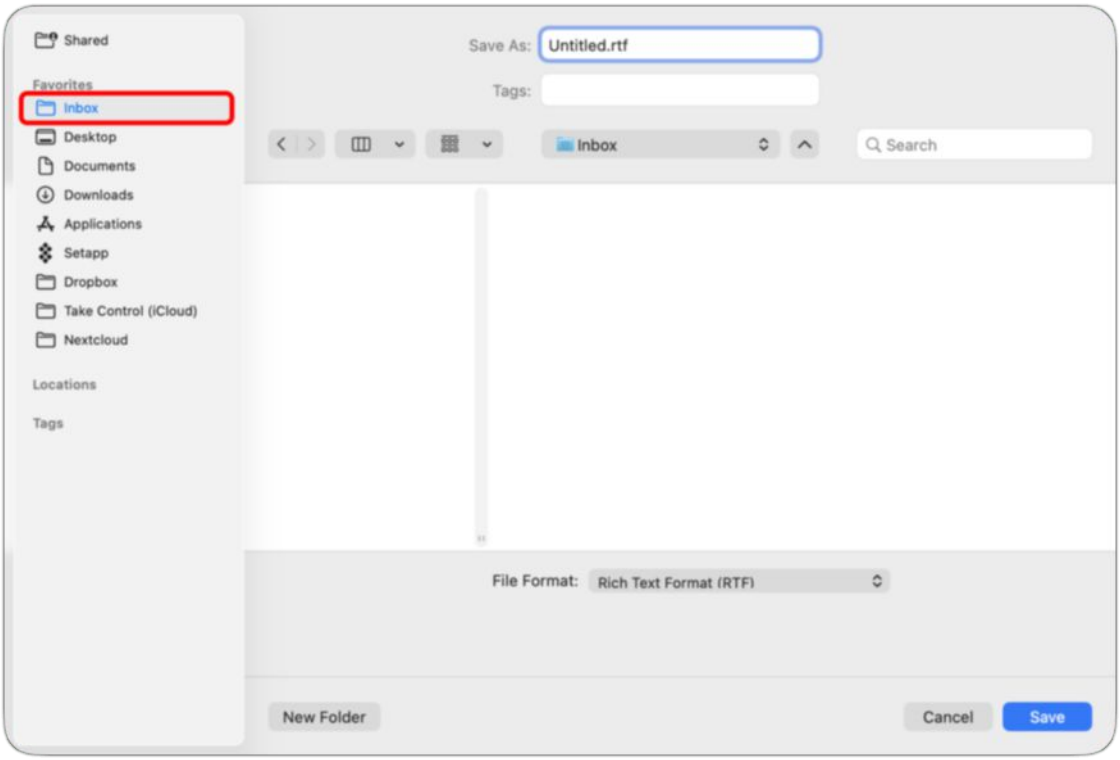

Figure 40: The systemwide global Inbox (shown here circled in red) appears in the sidebar of Save dialogs.

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

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

Use the Services Menu

One of the Mac's best-kept secrets is a mechanism called Services, which lets an app share some of its capabilities with other apps. Using services, you can take advantage of a handful of DEVONthink features even when you're working in other apps. Specifically, services provide

yet another way to get information into DEVONthink (along with a couple of other cool capabilities).

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

In addition, some services have keyboard shortcuts (as shown on the *App* > Services submenu and in **Figure 41**), and you can add your own shortcuts (as I describe shortly).

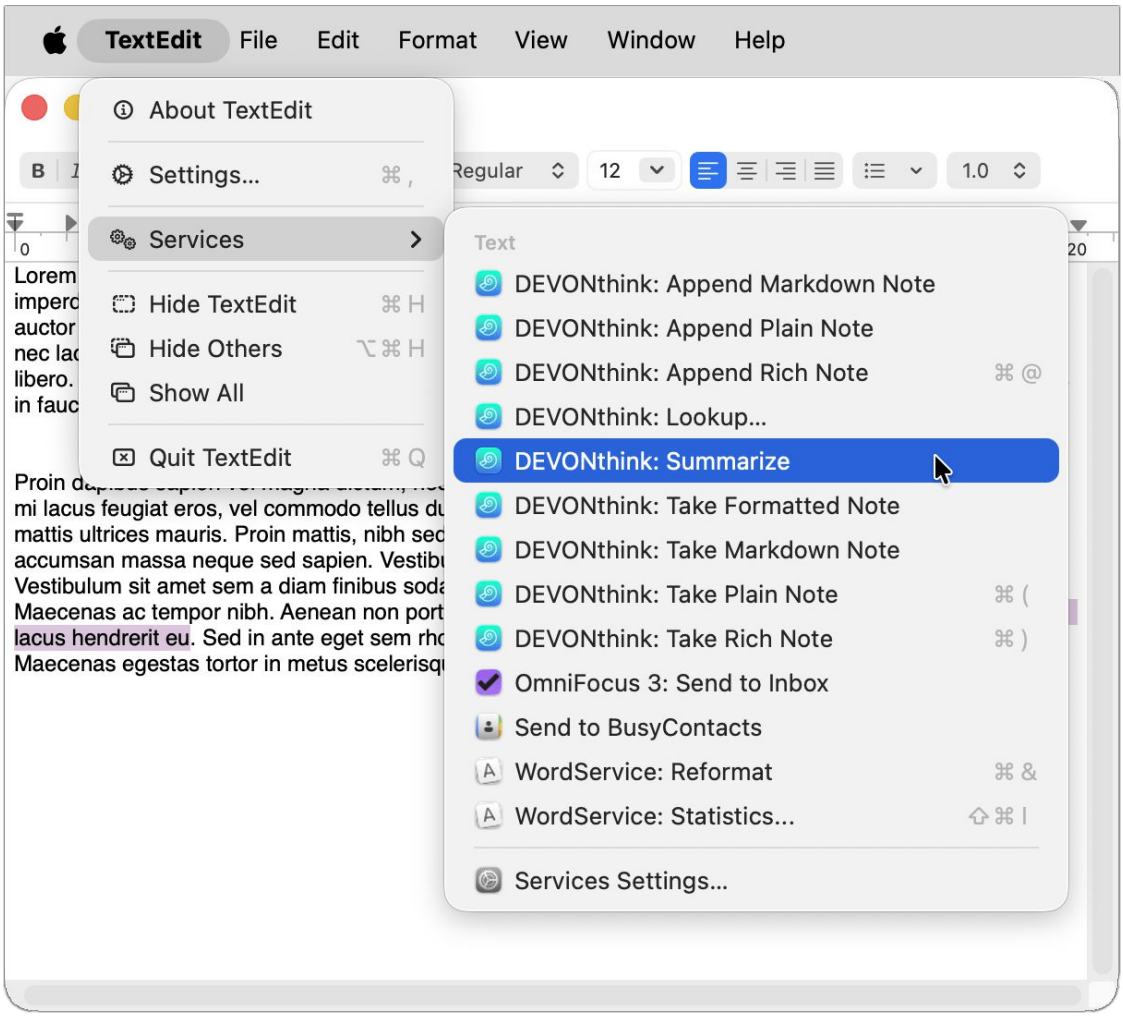

Figure 41: DEVONthink adds a bunch of commands to the system-wide Services menu. Those that apply to selected text appear here.

DEVONthink can add up to 13 commands to the various Services menus; all are prefixed with "DEVONthink":

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

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

1. Go to System Settings > Keyboard > Keyboard Shortcuts > Services.
2. In the list on the right, navigate to the service you want to enable or disable, and check (or uncheck) its box. All of DEVONthink's services start with "DEVONthink," but they're found under various headings—Add to DEVONthink is found under "Pictures," Capture Web Archive is found under "Files and Folders," Add To Reading List and Capture Bookmark are found under "Internet," and the others are all located under "Text."

3. Optionally, to add (or change) a keyboard shortcut for a service, double-click the space to the right of the service name and press your desired key combination.

The changes you make to services become available immediately.

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

Use the Sorter

Yet another way to add information to DEVONthink is to use a special panel called the Sorter. The sorter provides a way to add nearly any sort of content to the location of your choice in DEVONthink no matter what app you're using or what's on your screen—without switching to DEVONthink itself—as well as a way to search your open databases.

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

If you choose Show as Menu Extra, you'll see a new menu in your main menu bar called DEVONthink (if Text is selected next to Menu Extra Title in the Sorter setting pane) or with the nautilus icon (if Icon is selected). In either case, click that item on the menu to show the Sorter (**Figure 42**).

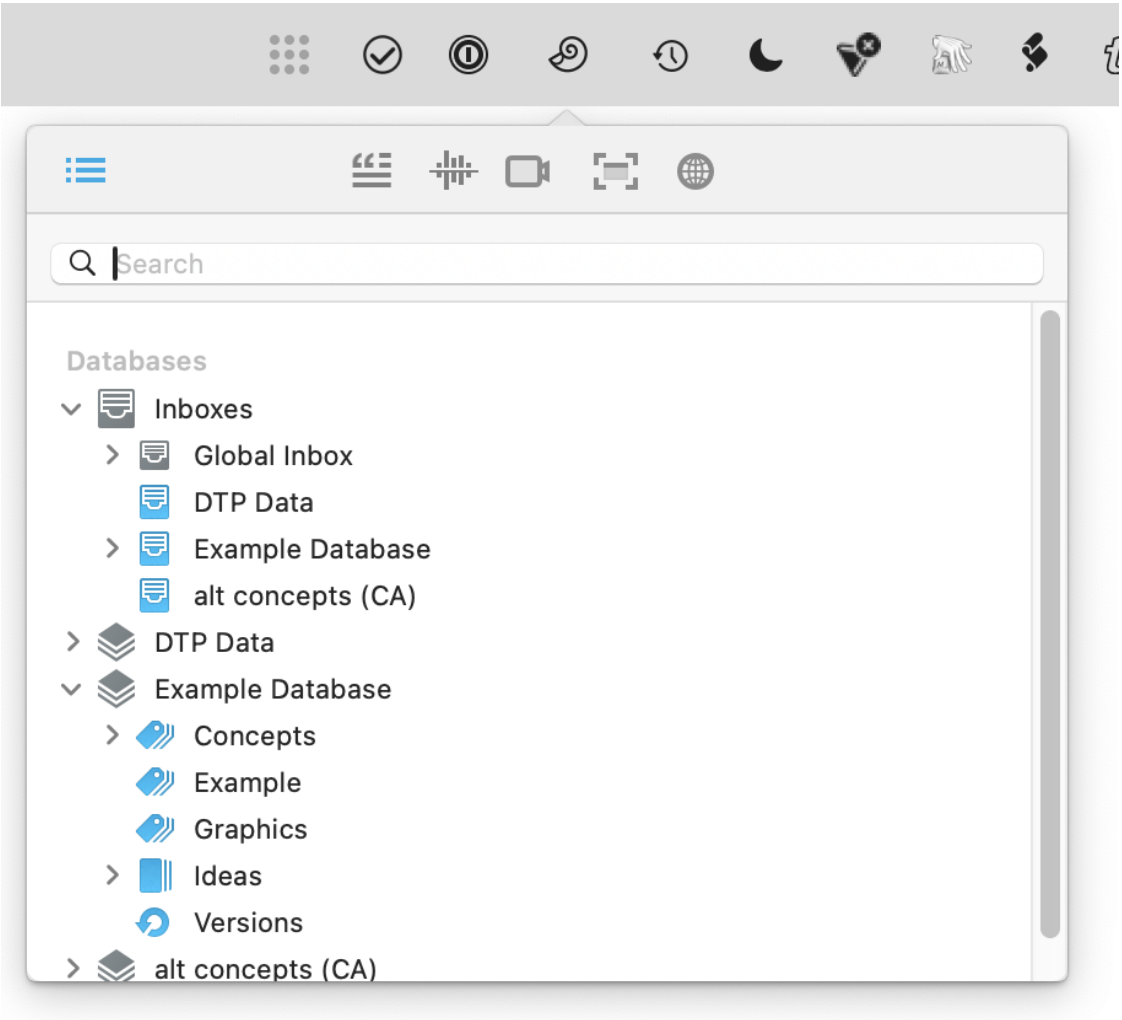

Figure 42: The Sorter as it appears on the main menu bar.

On the other hand, if you choose Show as Dock Tab, a translucent tab appears docked at the side of your screen; you can choose any of six locations for the docked tab by clicking a radio button on the Position display. Whichever spot you choose displays a gray tab that hovers over all other windows; when you click it, the Sorter slides out from that location (**Figure 43**). Click the tab again to hide the Sorter.

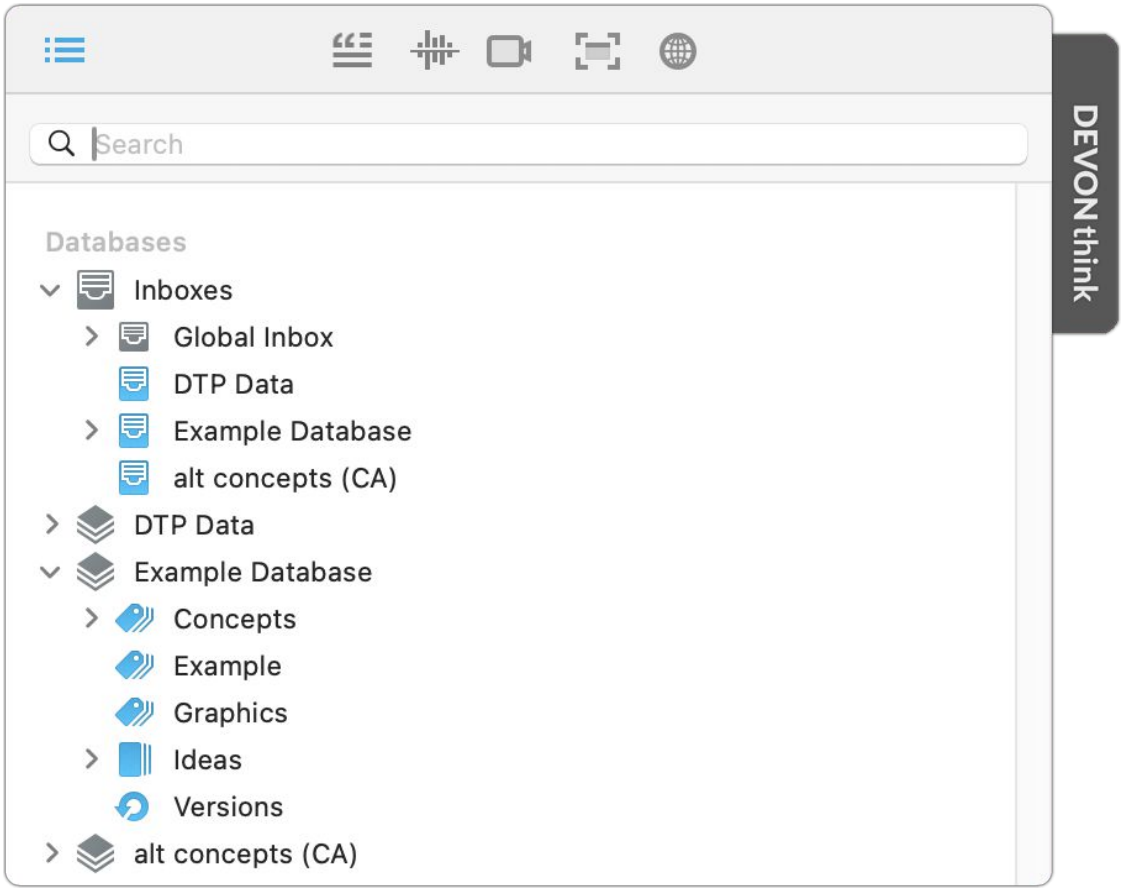

Figure 43: The Sorter as it appears when you click its docked tab.

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

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

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

- **Copy the selection:** Similar to the Take Note feature (but without an icon in the Sorter) is the Copy Selection feature. Assign a keyboard shortcut to this action by choosing Settings > Sorter and clicking the Copy Selection Hotkey field. Now, when you make a

selection in any document and press that key combination, the Sorter opens with the selected text prefilled in the Body field.

Note: The first time you do this, you may see an accessibility warning. If so, click Open System Settings. Turn on the DEVONthink switch, authenticate when prompted, and close System Settings.

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

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

- **Capture the screen:** To capture the contents of the screen as a DEVONthink document, click the Screen Capture icon on the Sorter's toolbar. Click Screen (⌘-1), Window (⌘-2), or Selection (⌘-3), as you prefer (optionally selecting "Include this window" to show the Sorter itself in the screenshot). If you select Window or Selection, next select the desired area and click the mouse button. Fill in the desired metadata and click Add.

Note: Once again, you need accessibility permission to record the screen. Go to System Settings > Privacy & Security > Screen & System Audio Recording and turn on the DEVONthink switch.

- **Capture a web clip:** To capture the contents of a webpage, click the Web Clip icon on the Sorter's toolbar. Then click your default browser (to capture its frontmost tab or window), "URL on the clipboard" (to capture a URL you've previously copied), or "Enter manually" (to capture a URL you type in). Fill in the desired meta-

data and click Add. You can also assign a keyboard shortcut to capturing a web clip using the Sorter; choose Settings > Sorter and click the Clip to DEVONthink Hotkey button.

Tip: Note that each web clip *format* also has its own keyboard shortcut, as shown on the pop-up menu.

Whichever format you choose, you can also optionally select the Clutter-Free checkbox (press ⌘-F to toggle it) to save the page in an uncluttered and nicely readable format—without ads and most other distractions. You can also optionally click Preview to see what the clip will look like in its reformatted state.

Make the Sorter Tab Less Visible

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

Use the Share Extension

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

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

1. Go to System Settings > General > Login Items & Extensions, scroll to the Extensions heading, and click By Category. Then click the info icon next to Sharing (see **Figure 44**).

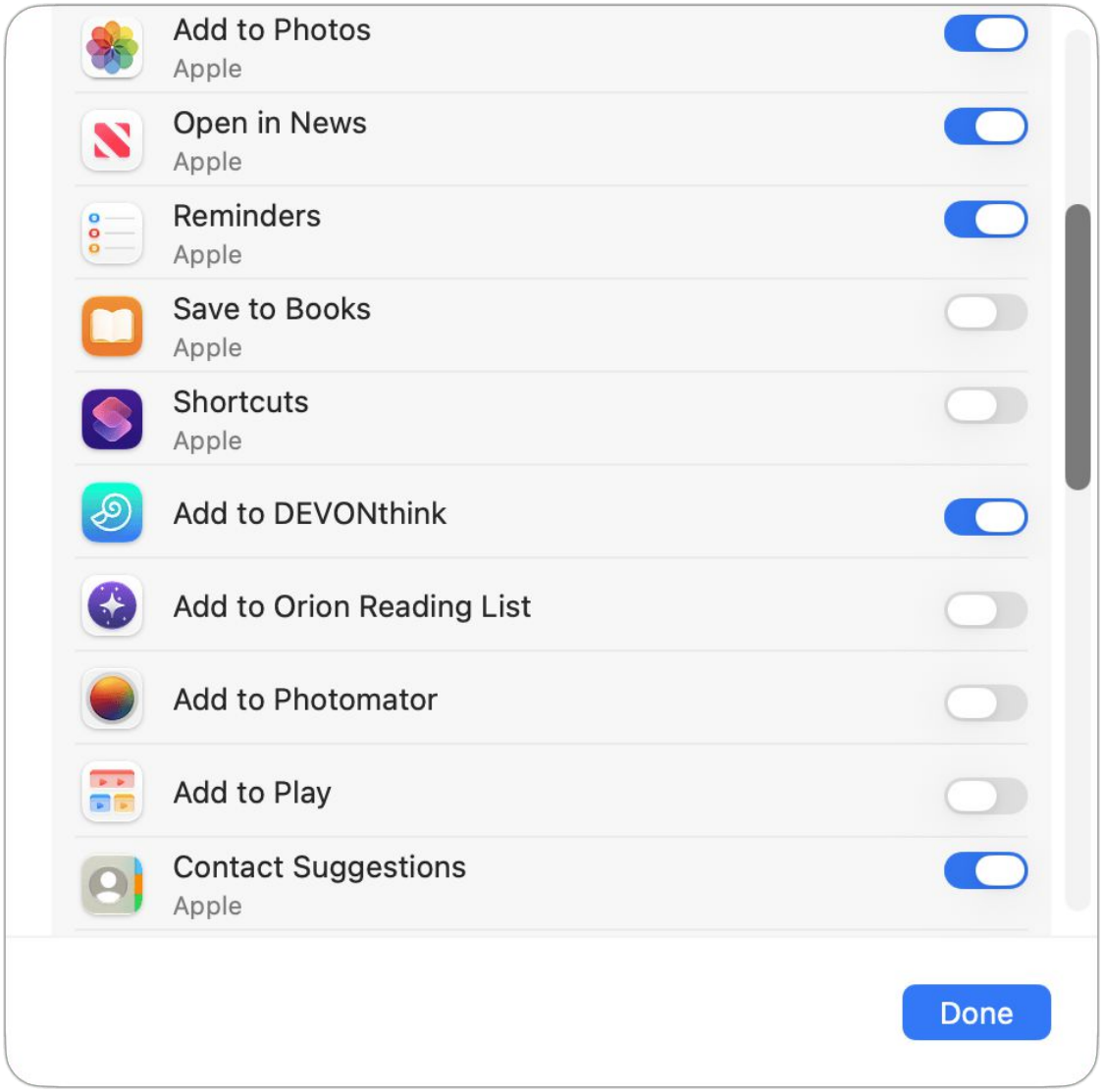

Figure 44: Select this checkbox to include the Add to DEVONthink command on your Share menus.

2. Turn on the Add to DEVONthink switch.

3. Click Done and close System Settings.

Once you've done this, Add to DEVONthink appears on the Share menu in every app that includes one. To capture information into DEVONthink from that app, choose Share > Add to DEVONthink (keeping in mind that the command may be on a submenu). If the Sorter is enabled, a note appears with the selected information filled in; if the Sorter is disabled, a similar-looking Take Note window appears. Either way, fill in the desired information and click Add (in the Sorter) or Save (in the Take Note window).

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

Add Web Content

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

- Clip to DEVONthink Browser Extension: This extension works in Safari, Chrome, and Firefox. Once installed, you can simply click the Clip to DEVONthink icon to add the entire webpage. You'll be able to choose from variety of formats for storing the page, including rich text, HTML, PDF, or only the bookmark.
- Web Bookmarklets: This option may be right for you if you're using a browser for which there's no Clip to DEVONthink extension. But regardless of your browser, a bookmarklet may be the fastest way to add a webpage: there's an individual bookmarklet for each format, so if you know what you want, adding a page to DEVONthink can be a one-click operation. (There is also a bookmarklet that works the same as the Clip to DEVONthink browser extension, allowing you to choose the format you want each time—but that takes more clicks.)

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

Tip: When viewing articles you captured from the web, you can choose View > Document Display > Reader to display a version of the page with minimal formatting, similar to Safari's Reader view.

Clip to DEVONthink Browser Extension

When you install DEVONthink, it automatically adds a Clip to DEVONthink extension to Safari (though you still have to enable it in Safari by going to Safari > Settings > Extensions and selecting the Clip

to DEVONthink checkbox). You can also optionally add the extension to Chrome or Firefox. To do so, choose DEVONthink > Install Add-ons; select one or both of Google Chrome Extension and Firefox Extension, and click Install. Then switch to the browser(s) in question and follow the prompts to complete the installation process.

To capture a page while you're browsing, click the Clip to DEVONthink icon. If the Sorter is enabled, it appears; otherwise, the Clip to DEVONthink window (**Figure 45**) appears. Either way, you see the same options.

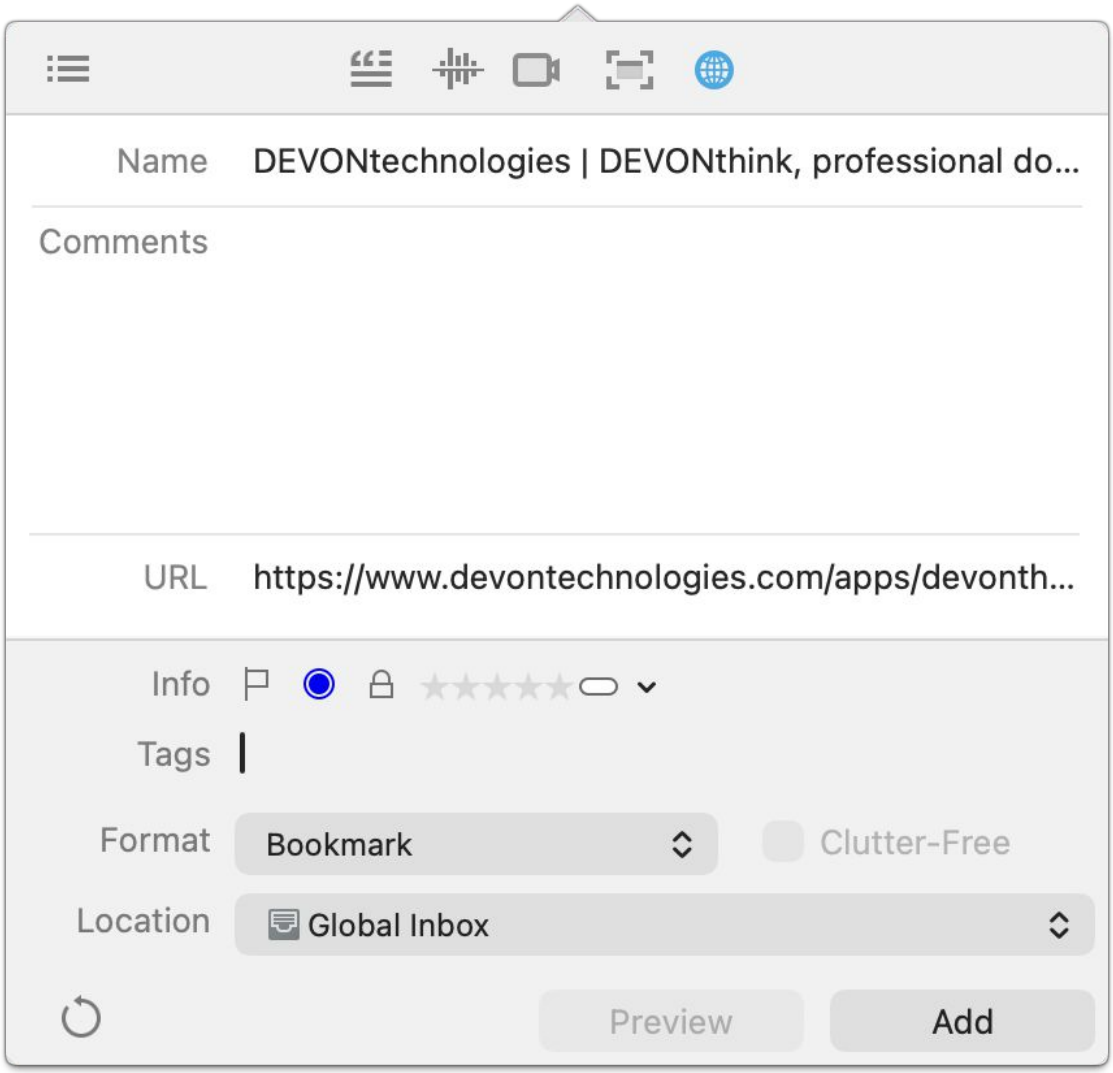

Figure 45: When you use the Clip to DEVONthink browser extension or bookmarklet, you can add a note, enter tags, and choose a format here.

You can then click Add (to accept all the defaults) or make changes first—everything is optional, including additions or changes to the

Name and URL fields, comments, tags, and other metadata. (In most browsers, though not Safari, any selected text on the webpage is prefilled into the Comments field.) You can also choose a location from the Location pop-up menu at the bottom of the window. Of special note, however, is the variety of formats you can choose from the Format pop-up menu (as we've seen elsewhere in DEVONthink):

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

Tip: Keyboard shortcuts are available for each of these, as shown on the pop-up menu.

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

Whichever format you choose, you can also optionally select the Clutter-Free checkbox (press ⌘-F to toggle it) to save the page in an uncluttered and nicely readable format—without ads and most other distractions. You can also optionally click Preview to see what the clip will look like in its reformatted state before committing to it.

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

Web Bookmarklets

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

DEVONthink offers 10 bookmarklets, each of which stores data in a different way. The most versatile of these is Clip to DEVONthink, which works exactly like the Clip to DEVONthink browser extension I described just above.

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

To install the bookmarklets, follow these steps:

1. Open the browser you want to use, and go to the DEVONtechnologies Handbooks and Extras page.
2. Make sure your Favorites (or Bookmarks) bar is visible. If not, then in Safari, choose View > Show Favorites Bar; in Chrome, choose View > Always Show Bookmarks Bar; or in Firefox, choose View > Toolbars > Bookmarks Toolbar > Always Show.
3. Under the page's Bookmarklets heading, drag the Drag to Bookmarks button next to Clip to DEVONthink directly onto the Fa-

vorites (or Bookmarks) bar. Repeat, if desired, with any or all of the other bookmarks.

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

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

Once the bookmarklets are installed, using them is a simple matter of clicking the bookmarklet's name (or choosing one of the bookmarklets from the a pop-up menu) on your Bookmarks bar (**Figure 46**).

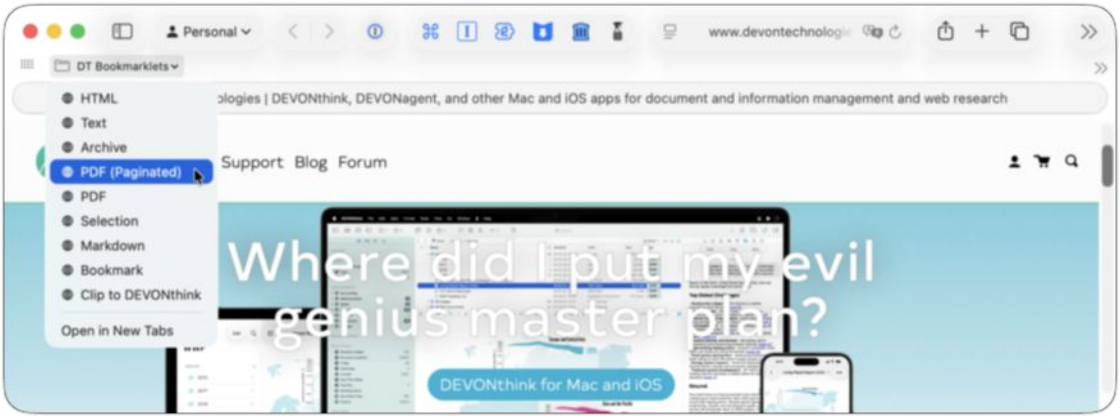

Figure 46: Use bookmarklets to grab web content from a browser.

Using DEVONagent Pro with DEVONthink

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

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

Add Email Messages

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

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

Note: Email archiving requires DEVONthink Pro or Server.

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

can Use the Mail AppleScripts with Apple Mail or Use the Outlook AppleScripts.

Import Messages Using the Import Sidebar

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

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

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

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

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

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

4. Select an account or mailbox, or one or more individual messages. In the Email inspector (**Figure 47**) that appears on the right, you can use the Search field, Show pop-up menu, date pickers, and checkboxes to filter the display of the selected account or mailbox.

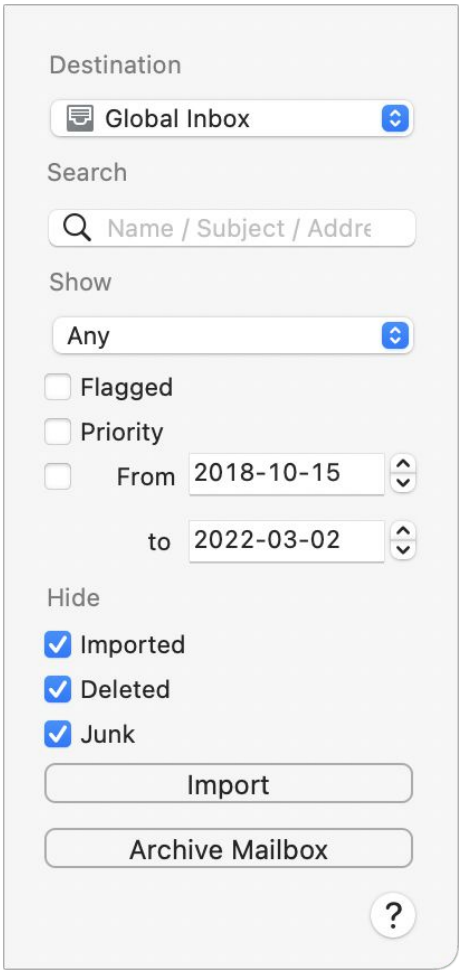

Figure 47: The Email inspector lets you filter messages and set options for importing email.

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

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

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

Individual messages are stored at your chosen location in a group bearing the name of their mailbox. Archived mailboxes, on the other

hand, are stored in a hierarchy of groups that includes the name of the account and client, and that is, in turn, contained in an Emails group.

Import Unix Mailboxes

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

Use the Mail AppleScripts

DEVONthink can also use AppleScripts to import messages from Mail. The scripts are found on the *systemwide* Script menu, which should appear among the little icons on the right side of your menu bar. If you don't see it there, open the Script Editor utility (found in `Applications/Utilities/`), choose Script Editor > Settings, and select "Show Script menu in menu bar." (You can then quit Script Editor.)

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

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

The Mail Rule AppleScripts

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

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

Use the Outlook AppleScripts

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

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

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

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

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

Work with Imported Messages

When you view an imported email message in DEVONthink, it looks much like the original—generally, including headers and any text

styles. However, URLs in plain text messages may not initially be clickable links and certain attachments may not appear. If this happens, switch from the default preview mode to text-only mode by choosing View > Document Display > Text Alternative (⌘-Control-X) or clicking the Text icon on the navigation bar.

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

Use the PDF Menu

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

The commands used to send PDF files of the current document to various locations are found in the PDF pop-up menu at the bottom of every Print dialog (**Figure 48**).

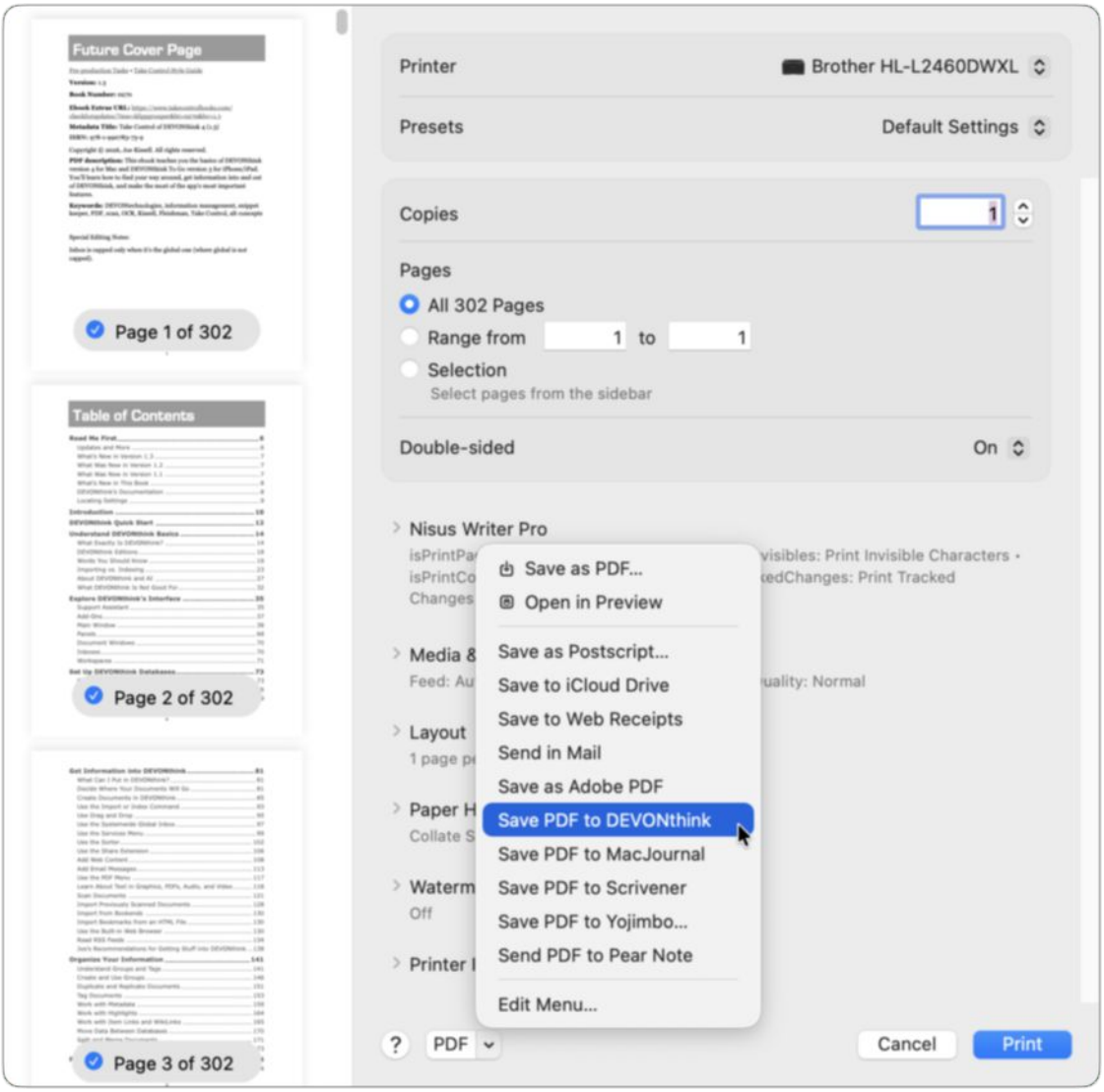

Figure 48: In any Print dialog, choose Save PDF to DEVONthink from the PDF pop-up menu to add a PDF of the current document to DEVONthink.

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

Learn About Text in Graphics, PDFs, Audio, and Video

Just ahead I cover scanning documents, but before we get there I want to provide some important details about how DEVONthink can locate text within different file formats.

When you import a graphic into DEVONthink (such as JPEG or PNG), a scanned PDF, an audio file (such as `.mp3` or `.wav`), or a video file (such as `.mp4` or `.mov`), you probably want to index text found within it and any metadata about it so you can search its contents for words and phrases. DEVONthink 4 Pro and Server offer numerous ways to discover that text, but your options and how they relate to each other can be a bit confusing, so I'd like to spell them out for you.

Suppose you are using a document scanner or your phone to scan physical pages. Generally speaking, scanned documents are stored in PDF format, as opposed to scanned pictures, which may use one of a variety of image formats. A PDF file can contain a bitmapped image of the scanned document such that if you were to print it, it looks just like the original. But it can also hold an invisible layer with the document's text, which can be indexed, searched, selected, copied, annotated, and so on. DEVONthink can perform optical character recognition (OCR) on the scanned image in the PDF—automatically or manually—to add the searchable text layer; or if you prefer, you can use another app to do that. (Numerous other Mac apps offer this feature; your scanner likely also comes with OCR software.) I discuss all this next, in Scan Documents.

An OCR-provided text layer in a PDF means not only that you can find the document when searching within your database, but also that you can find text *within* the document using the Search inspector. Plus, if you save the PDF outside DEVONthink, other apps can also see and use that text layer.

Note: Although adding a PDF text layer is the most common way to use OCR, you can also ask DEVONthink to create a separate file with the text contents. From the Data > OCR submenu, choose "to searchable PDF," "to RTF document," "to Word document," or "to Web Archive." Or, choose "to Comment" or "to Annotation" to save the text as metadata within one of those two fields in the file.

All of the above has been true for many years. However, with recent versions of macOS (and new features in DEVONthink 4), another method of obtaining text from non-text files, called *transcription*, is also available.

First, in many cases, a form of OCR occurs automatically with graphics and PDFs on your Mac. For example, open a photo of a sign in Photos, or a scanned PDF in Preview, and you can immediately search for text in them, or select text and copy it. This background processing is done by Apple's built-in Vision framework, which DEVONthink can also tap into; or, you can opt to have DEVONthink use a third-party generative AI engine. Although this automatic recognition is impressively fast, it doesn't add a text layer to PDFs (limiting the ways in which the text can be used), and it lacks many of the advanced features of modern OCR apps.

Second, what is true for graphics and PDFs is also true for speech found in audio files (and the audio tracks of video files). Using Apple's on-device Speech framework, a cloud-hosted version of Speech, or OpenAI's GPT-4o model, DEVONthink can almost instantly make the text of audio and video files searchable.

Transcription can occur either automatically or manually. To enable *automatic* transcription upon import, go to Settings > Files > Import and select any or all of the Recognition checkboxes at the bottom:

- Transcribe PDF documents
- Transcribe Text & Notes in Images
- Transcribe Audio Files
- Transcribe Video Files

- Scan barcodes (see Scan Barcodes)

Then, to adjust transcription options, go to Settings > AI > Transcription. Here, you can set the following:

- **Destination:** Choose Searchable Text (which does *not* create a text layer in PDFs), Annotation, or Comment (see Info Inspector).
- **Images:** Choose a recognition method. The default ("Accurate Apple Vision text recognition") is usually best.
- **Audio & Video:** Choose a recognition method. The default ("Remote Apple Speech transcription") produces both fast and accurate results, but does involve sending your data to Apple's servers. You can also opt for local Apple Speech transcription or, if you have an OpenAI API key, Remote GPT-4o or Mistral Voxtral transcription.
- **Transcription Language:** Leave this blank and the engine makes its best guess. To force recognition to occur for a specific language, choose it from this pop-up menu.

You might choose not to enable automatic transcription or have existing files in DEVONthink that weren't previously transcribed. If so, you aren't out of luck: you can transcribe a file manually by selecting it and choosing Data > Recognition > Transcribe Text & Notes or Transcribe Speech.

Given all those options, here are my recommendations:

- Turn on all the "Transcribe" features in Settings > Files > Import to ensure that as many of your documents as possible are searchable.
- At your leisure, search for graphics, audio, and video files that have not yet been transcribed and use the Data > Recognition commands to transcribe them.
- *Also* perform OCR on all scanned PDFs (as described next) to make sure you can search within them and that their text contents are preserved when using the file outside DEVONthink.

Scan Documents

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

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

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

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

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

- **User-initiated:** You place a document in your scanner (typically, a flatbed scanner) and then, in DEVONthink, click the Import icon in the sidebar (or choose View > Import) and select your scanner under Devices. (If you don't see Devices, hover over the Image Capture label and click Show.) You can then make any desired changes to the settings and initiate the scan. As long as your scan-

ner or digital camera works with Image Capture, it should work here. This option avoids the need to open any external app. I say more about this ahead, in Pull an Image from a Scanner or Camera.

Tip: The first time you opened DEVONthink 4, you should have been prompted to install the optional ABBYY FineReader software, which provides OCR capabilities. If you didn't install it previously, do so now: choose DEVONthink > Install Add-ons, check ABBYY FineReader OCR, click Install, and follow the prompts.

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

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

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

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

Use a Ricoh ScanSnap

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

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

Use ExactScan

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

Use a Raven Scanner

Although Raven no longer sells scanners, if you still have a Raven scanner and have installed the Raven Desktop software, you can use DEVONthink as a destination for your scans. Follow the setup instructions in Connecting to DEVONthink in Raven Desktop. Then, adjust the settings in Configure OCR Settings for OCR (if desired).

Pull an Image from a Scanner or Camera

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

Note: This feature requires DEVONthink Pro or Server.

Follow these steps:

1. Click the Import icon in the sidebar (or choose View > Import) and select your scanner under Devices (**Figure 49**). If necessary, wait for it to warm up.

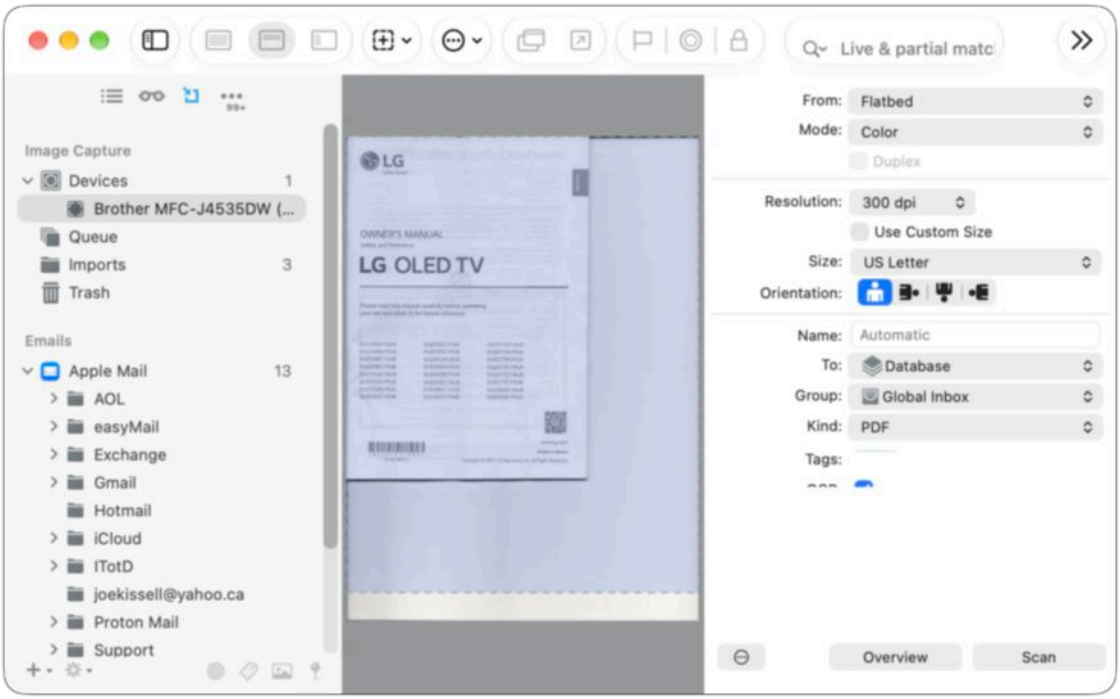

Figure 49: Use this view to control your scanner from within DEVONthink.

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

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

4. Click Scan.

DEVONthink stores the image in the location you chose.

Configure OCR Settings

If your scanner's software doesn't perform OCR itself, you can have DEVONthink automatically convert documents to searchable form as soon as a scan is complete. To configure DEVONthink's OCR settings (which also apply when you manually convert documents to searchable PDFs), go to Settings > OCR (**Figure 50**).

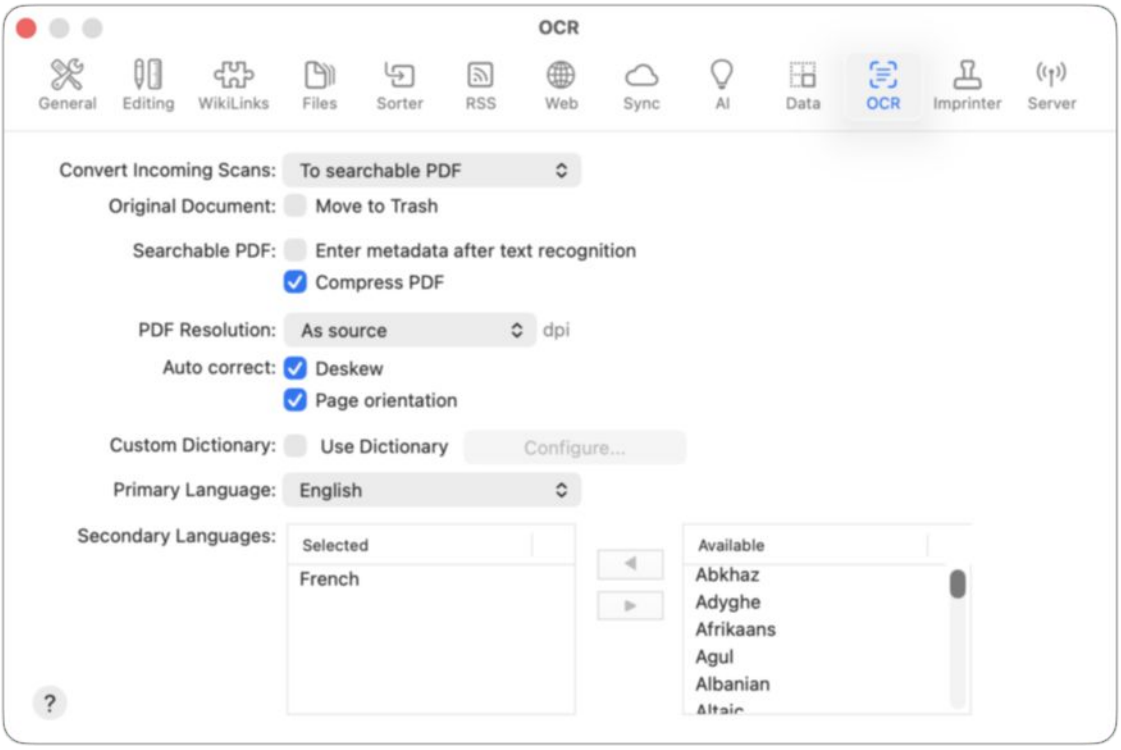

Figure 50: Configure settings for both automatic and manual OCR in this setting pane.

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

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

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

- **Original Document:** If you check Move to Trash, after DEVONthink creates a searchable PDF, it moves the original scan (with just the bitmapped image) to the Trash—in this case, the Finder's Trash, not DEVONthink's. In most cases, that's probably what you want, because otherwise you'll end up with two copies of every scanned document.
- **Searchable PDF:** If "Enter metadata after text recognition" is checked, as it is by default, then every time you scan a document into DEVONthink, the app displays a dialog (**Figure 51**) in which you can enter a title, subject, tags, and other metadata. A scrollable preview of the document, on the left, helps you remember what's in it—handy if you're scanning a large stack of documents at once.

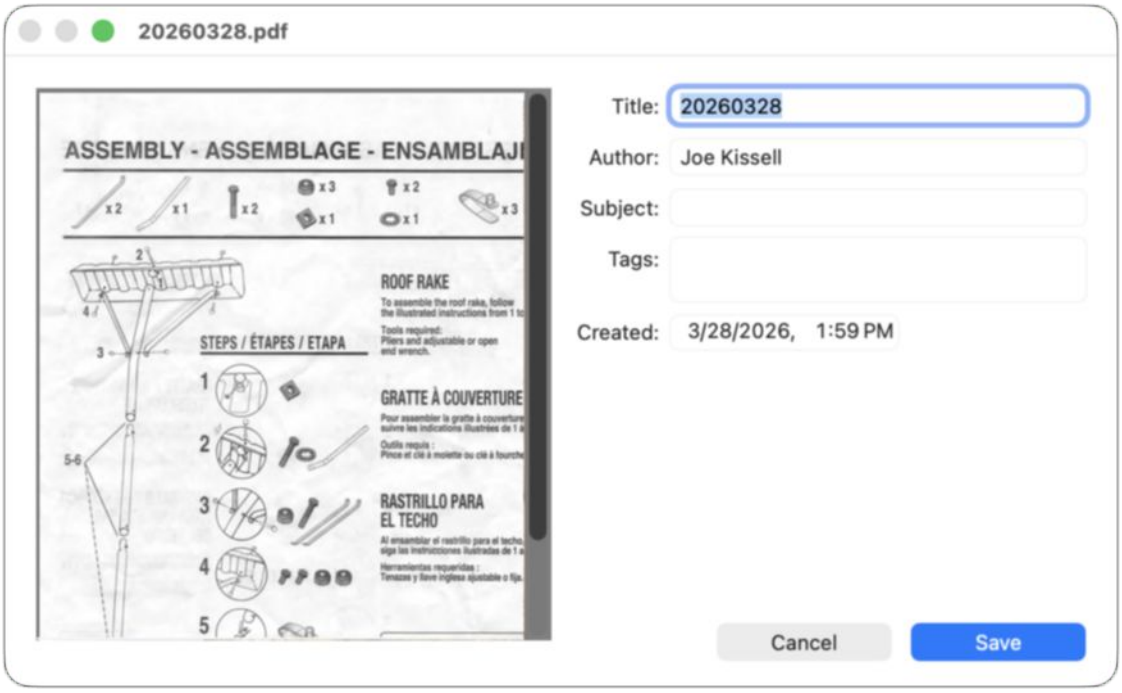

Figure 51: To name and tag scanned documents as the text is recognized, select "Enter metadata after text recognition" in the OCR setting pane, which results in this dialog appearing after each scan.

If you don't enter this data as you scan, you end up with files with unhelpful names like "20250616_004" and no tags. On the other hand, if you're scanning lots of documents at once, stopping what you're doing every minute or two to enter document details can be a drag. Because I usually scan only one or two documents at a time, I find it most effective to leave this box checked.

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

- **PDF Resolution:** Set the resolution of the image layer in the PDF by choosing a number from 150 to 600 (dpi), or choose "As source" (the default) to keep whatever resolution your scanner software originally used. (My recommendation: 300 dpi.)
- **Auto correct:** Select "Deskew" (to straighten crooked images) or "Page orientation" (to detect which way is up and rotate the image if necessary).
- **Custom Dictionary:** If you scan documents that may contain unusual words that wouldn't be found in DEVONthink's built-in dictionaries, you can add your own custom dictionary (which is simply a word list) to improve recognition accuracy. To do this, select Use Dictionary, and then click Configure to choose your language and enter your list of words.
- **Primary Language:** Choose the language that most of your documents will be in (presumably English if you're reading this book).
- **Secondary Languages:** If you expect to scan documents in any language other than the primary language, select each of those languages in the Available list and click the left arrow button to add them to the Selected list. (I put French in this list, because many of the documents I scan are in French.)

Import Previously Scanned Documents

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

Note: To learn about how OCR and transcription options compare, refer back to Learn About Text in Graphics, PDFs, Audio, and Video.

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

1. Choose File > Import > Images (with OCR).
2. Navigate to the folder where the images are stored. Select one or more files (⌘-click to select multiple files).
3. To set additional options, click the Show Options button at the bottom:
   a. To move the original file *in the Finder* to the Trash after DEVONthink imports it, check "Move originals into database"; to leave the original in place, uncheck the box.
   b. If you want the documents to be converted to a format other than searchable PDF, choose the one you want from the Convert pop-up menu: RTF, Word, Web Archive, Comment, or Annotation.
4. Click Open.

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

Perform OCR on Documents in Your Database

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

Import from Bookends

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

Import Bookmarks from an HTML File

If you have an HTML file containing a list of bookmarks (for example, one exported from Safari), DEVONthink can import it. Choose File > Import > "Bookmarks from HTML file," select one or more files, and click Open. DEVONthink creates a new group for each HTML file, preserving the hierarchy of the original bookmarks, and names each bookmark automatically.

> **Note:** When importing or indexing local copies of files downloaded from Google Docs or Google Sheets (`.gdoc` or `.gsheet`), DEVONthink treats them as bookmarks.

Use the Built-in Web Browser

DEVONthink includes Apple's WebKit, the same rendering engine Safari uses to display webpages. So a webpage viewed in DEVONthink should look the same as it would in Safari. The difference is that even though you can store bookmarks, follow links, use multiple tabs, and click previous/next page buttons, DEVONthink treats each page as a separate (dynamic) document. That means (among other things) there's no editable address bar—only the URL of the current page. So even though DEVONthink can show you the contents of webpages, it's

not so much a *browser* (that is, it doesn't facilitate random browsing) as a tool that can fetch, render, and store webpages.

There being no address bar, how do you open a webpage in the first place? Choose Script > Tabs > Open Location..., enter a URL, and click OK. DEVONthink then displays the resulting webpage as an ordinary document (**Figure 52**).

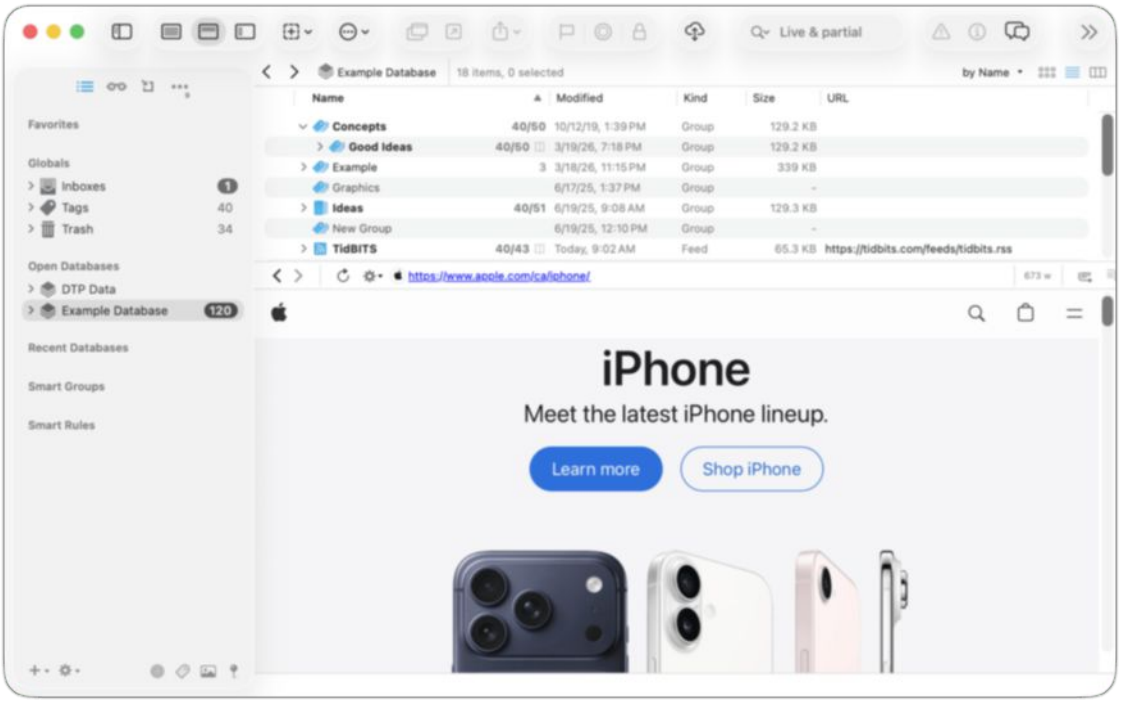

Figure 52: You can display any webpage in DEVONthink as though it were a regular document.

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

- **Bookmark:** Stores a bookmark for the page—that is, a document containing only its URL. When you select this bookmark in your database, DEVONthink attempts to connect to the site to download and display the page, in whatever state it's in at that point. Alternatively, you can capture the address by choosing Data > New > Bookmark. (Or, drag the page's address from the navigation bar onto a group or tag.)
- **Rich Text:** Stores the page as a rich text document.

- **Formatted Note:** Stores the page as a formatted note.
- **Markdown Text:** Attempts to store an approximation of the page's content formatted as Markdown, though actual results are highly variable based on the page design.
- **HTML Page:** Stores the webpage as an HTML file.
- **Web Archive:** Stores the page and any associated media as a web archive.
- **PDF (One Page):** Stores the page as a (non-paginated) PDF file.
- **PDF (Paginated):** Stores the page as a paginated PDF file.
- **Clip to DEVONthink:** Displays the Clip to DEVONthink dialog (see Clip to DEVONthink Browser Extension), which lets you choose a format, change the name, add tags, and so on.

Downloading and Importing an Entire Site Automatically

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

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

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

- **Tabbed browsing:** DEVONthink can open multiple browser tabs in a single window or the view/edit pane, but to use this capability, you must first turn it on—go to Settings > General > Interface and check "Enable tabbed browsing." (If you want the tab bar to be

visible even when just one webpage is open, also check “Always show tab bar.”)

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

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

Tabbed Browsing Isn’t Just for Webpages!

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

- **Previous/next page:** To move to the page you previously visited in the current window, view/edit pane, or tab, press ⌘-[or click the Go Back ❮ icon on the navigation bar; to move forward to the next page, press ⌘-] or click the Go Forward ❯ icon.
- **Reload:** Right-click (or Control-click) anywhere on the page and choose Reload from the contextual menu; or click the Reload ↻ icon on the navigation bar.

Read RSS Feeds

Just as DEVONthink can display individual webpages as documents, it can grab all the articles from an RSS (or Atom, RDF, or JSON) news feed, treating each article as a separate document and displaying its contents using the same WebKit rendering engine.

To add a feed, navigate to the location where you want to store it and choose Data > New > Feed. In the dialog that appears (**Figure 53**), enter the feed's URL (which usually begins with either `feed://`, filled in by default, `https://`, or `http://`), optionally type one or more tags (pressing Tab after each one) and enter a name if you want to override the feed's default name, and click Add. DEVONthink connects to the feed and downloads its current articles.

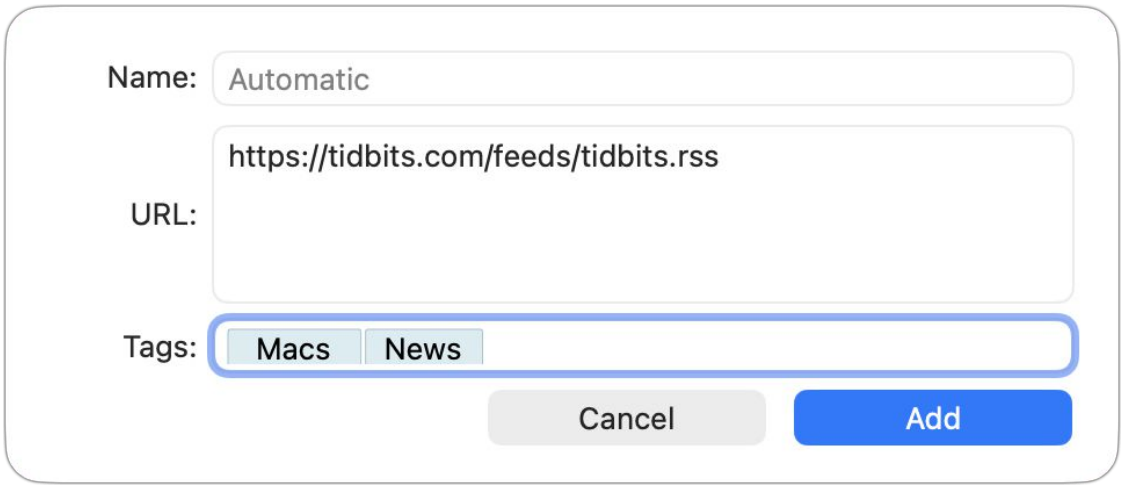

Figure 53: Enter a feed's URL and any tags you want to apply to it in this dialog.

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

To read an article in a feed, select the article under the feed name (**Figure 54**); doing so marks it as read. To manually change an article's read status, select it and choose Data > Mark > As Unread (or As Read), or press ⌘-K. These commands are also available on the Mark submenu of the Actions (⊙ ⌄ or ⚙ ⌄) pop-up menu and the right-click/Control-click contextual menu.

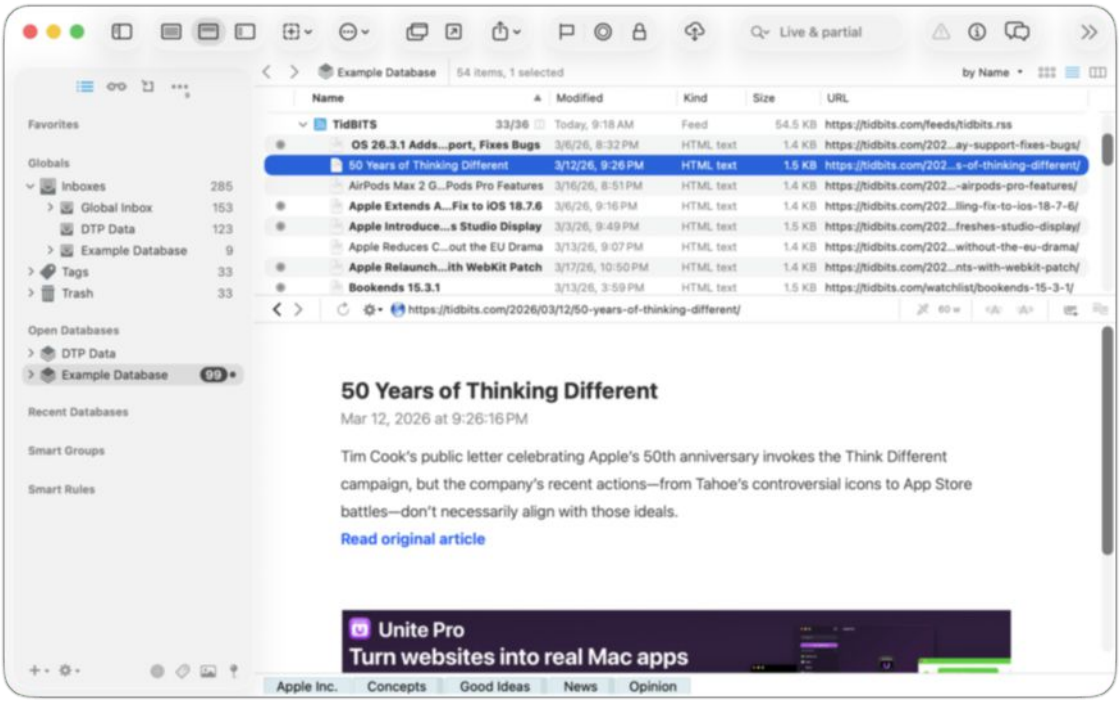

Figure 54: Feeds appear much like groups, and each article in a feed is a separate document.

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

DEVONthink offers several ways to adjust feed behavior, all found in Settings > RSS (**Figure 55**).

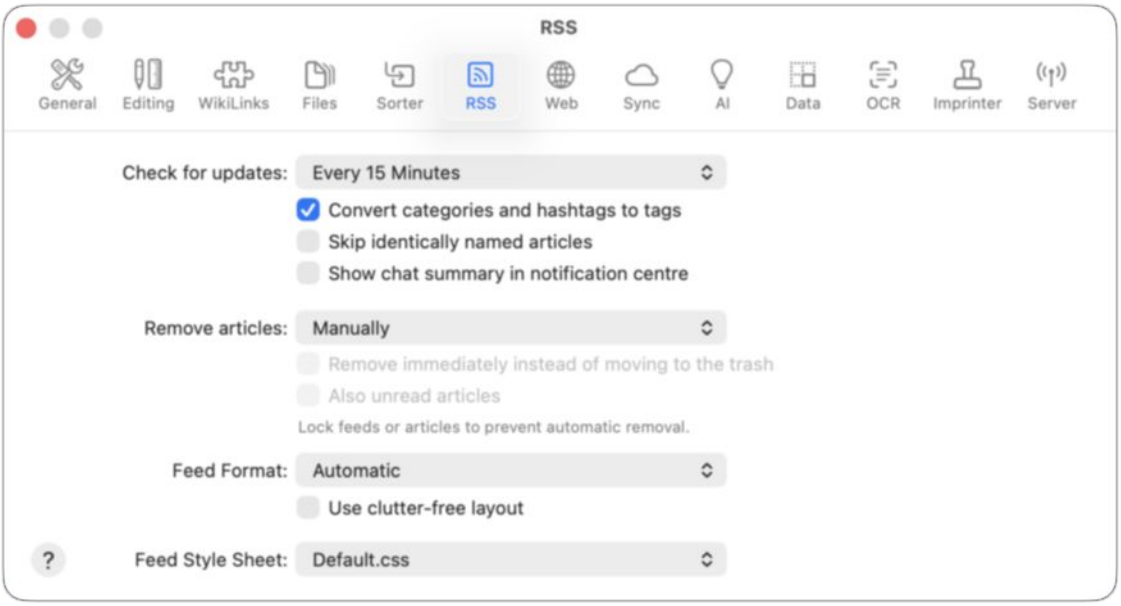

Figure 55: Configure settings here for handling RSS feeds.

You can adjust the following settings:

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

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

- **Convert categories and hashtags to tags:** Many RSS feeds label each article with categories defined by the creator. To assign these categories to articles as tags, leave this box checked. This setting also converts hashtags (words prepended with a pound # sign, like #Canada) appearing in articles to tags. However, keep in mind that these tags persist even after the articles are deleted; if you have a large number of feeds, this setting can lead to an overwhelming number of tags.

- **Skip identically named articles:** If an article in a given feed has the same name as one that previously appeared there (even if it has

a different URL or GUID), it's likely a duplicate. Check this box to omit these extra articles from your feed.

- **Show chat summary in notification centre:** Available in the Pro and Server versions of DEVONthink when configured with an API key for an LLM (see Use Generative AI Features), this option displays a single summary, generated by an LLM, for all newly downloaded feed articles and displays it in Notification Center.

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

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

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

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

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

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

Joe's Recommendations for Getting Stuff into DEVONthink

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

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

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

- **Smaller screen:** Are you feeling cramped on a 13-inch MacBook Air? Is your display (of whatever size) filled with windows ten layers deep? If so, you probably want to avoid more screen clutter. If you use the Sorter, display it as a menu extra using the icon rather than text. Consider hiding your Dock and using Spaces to put DEVONthink in a space by itself. Then, to get data into DEVONthink from another program, use the Sorter menu bar icon (which, as you recall, pops out the Sorter as needed when you drag something to the icon), the Services menu, the Share extension, or, in a web browser, the Clip to DEVONthink extension or a bookmarklet. In the Finder, use the systemwide global Inbox.

- **Large screen:** If you're fortunate enough to have, say, a couple of Apple Studio Displays or a Pro Display XDR, make the most of your screen real estate by keeping the Sorter open in docked tab mode (with databases and groups expanded to show as much as possible) in a convenient location, and use drag and drop to put clippings and documents right where you want them. Or, if you have *serious* screen space (like a Mac Pro with six 6K displays), you could devote a whole display just to DEVONthink and then drag anything you want to save directly into the app.

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

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

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

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

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

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

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

Organize Your Information

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

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

Understand Groups and Tags

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

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

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

In order to enable groups and tags to work together as effectively as possible, DEVONthink uses the same underlying construct for both. That is to say, behind the scenes, both groups and tags are merely

labels—pieces of metadata associated with documents. In many respects, groups and tags function (and even look) almost exactly the same, and you can mix and match groups and tags freely (but see the sidebar Stepping Stone: Are You a Grouper or a Tagger?, ahead).

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

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

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

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

- Every tag is also a group—of sorts. All your tags are listed under Tags in the Globals portion of the Navigate sidebar, and if you drag a document from outside DEVONthink to one of these tags (meaning it's not already in an inbox or some other group), the only place that document appears in your database (other than in its inbox) is in that tag's "group."
- Groups and tags can both be hierarchical—you can nest one inside another, as many levels deep as needed, just like folders in the Finder. You can drag and drop groups anywhere they appear in your database to rearrange them, but it may not be obvious how to rearrange tags. The easiest way to do so is to go to the Tags list under Globals in the Navigate sidebar and drag one tag onto another, thus making the first tag a "child" of the second one (and causing all child documents to inherit the parent tags).

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

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

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

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

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

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

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

- If a document is in a group, ipso facto, it's tagged with that group's name. If you remove the group's tag from the document, the document disappears from that group (and, if that was the document's only tag, DEVONthink moves it to that database's inbox).
- If you replicate a document to another group, not only the new replicant, but *all* replicants get the tag of the new group name (and its parent groups). So, if a document is in the Cookies group and you replicate it to the Sweets group, both replicants are tagged with both group names.

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

Stepping Stone: Are You a Grouper or a Tagger?

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

- **Grouper:** You might be a "grouper" if you've set up an extensive, well-thought-out hierarchy of folders in the Finder or mailboxes in your email app, and if you fastidiously file everything. If so, continue that practice in DEVONthink, and ignore tags. But try to give every group a unique name—perhaps one reflecting its position in the hierarchy (such as "Taxes 2025" instead of just "2025"). If you find that a document belongs in two different places, use a replicant rather than a tag. (Groups may also be best if other people use your database, as it's often easier to locate unfamiliar material in a good hierarchy than by guessing at what tags another person may have used—even though tags may be hierarchical, too.)
- **Tagger:** You might be a "tagger" if you prefer Gmail's labeling approach over filing each message in a single, specific mailbox; if your email inbox contains thousands of messages; or if you frequently use tags to identify files in the Finder (and pay little attention to file organization). In DEVONthink, a tag person might decide to keep everything in the inbox (despite my advice to the contrary elsewhere in this book), apply tags as necessary, and use search as the main way to find things. One downside: DEVONthink's built-in artificial intelligence features, such as See Also and Classify, won't be of any use, as they rely on (ordinary) groups.

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

Create and Use Groups

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

Create a Group

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

- Choose Data > New > Group (⌘-Shift-N).
- From the New pop-up menu on the toolbar, choose Group.
- Right-click (or Control-click) anywhere a group or document may appear and choose New > Group.

After creating a new group (in any of these ways), type a name for it and press Return; you can select it and click its name later to rename it. The names of empty groups are shown in gray; when a group contains one or more items, the name is shown in black (though the difference in shading is subtle).

Grouping Documents Using the Group Items Command

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

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

DEVONthink places no restrictions on how many groups you can create, how deeply you can nest them, or what you can name them (you can even have multiple identically named groups in the same location if you like, which strikes me as problematic). However, I tend

to get the best results—especially when using features that rely on artificial intelligence—with a modest number of groups in a database (say, fewer than a hundred or so), nested only a few layers deep, and with more than a few documents in each one.

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

Stepping Stone: Artificial Intelligence and Document Length

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

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

Move Documents

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

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

- Choose Data > Move To > Move To and select a group in the popover.

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

Tip: If you move a document (as above) or classify it (as below) and realize you've made a mistake, choose Data > Put Back to return it to its previous location.

Classify Documents

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

Classify Documents Manually

To classify a single document manually, select it and choose Tools > Inspectors > See Also (Control-S) or click the See Also icon at the top of the inspector. For now, pay attention to the top of the inspector—the Groups portion (**Figure 56**).

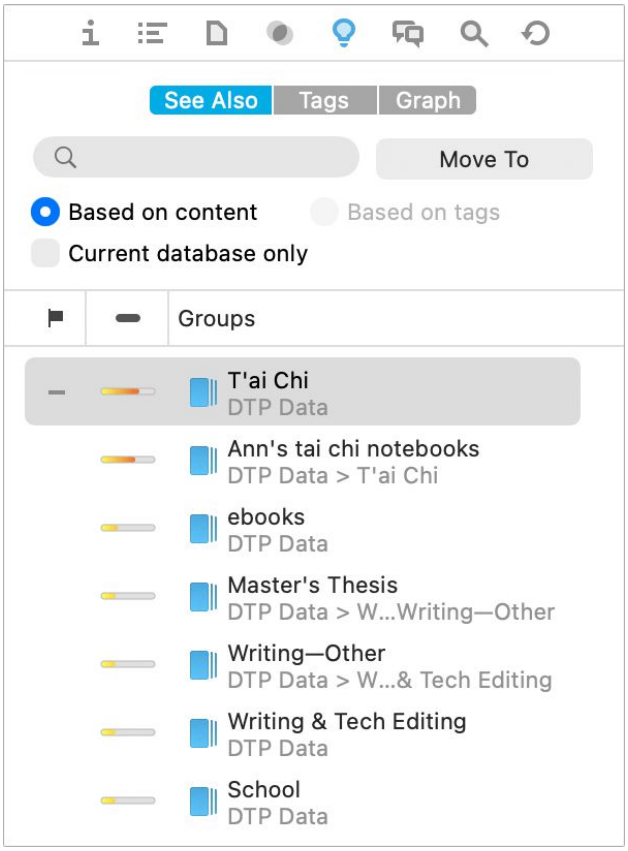

Figure 56: The Groups portion of the See Also inspector shows groups that may be a good home for the selected document.

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

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

Use the Classify and Classify To Commands

If, after using the Classify feature of the See Also inspector for a while, you realize that you nearly always accept DEVONthink's default choice, you can skip a step or two and have DEVONthink move a document—or more than one document—right into the highest-scoring group. The

command is Classify to "*Group Name*" (for single documents with only one recommended group), Classify to *X* groups (for documents that appear to belong in multiple groups), or simply Classify (if multiple documents are selected).

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

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

Using See Also

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

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

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

Duplicate and Replicate Documents

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

Make a Duplicate

The most common reason to make a duplicate is that you want to modify a document but leave the original intact. (For example, you may want to use last year's annual report as the basis for this year's report, making additions and modifications as necessary.)

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

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

Make a Replicant

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

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

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

- Hold down the ⌘ and Option keys while dragging the item to another group.
- From the Actions ⊙ ⌄ pop-up menu on the toolbar, choose Replicate To > *Name of Group*.
- Right-click (or Control-click) the item, and choose Replicate To > *Name of Group* from the contextual menu.
- Choose Data > Move To > Move To (⌘-Control-M), hold down ⌘-Option, and select a destination in the popover.

Where's My Replicant?

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

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

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

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

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

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

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

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

Tag Documents

Tags function almost, but not quite, like groups (and in some cases groups and tags are interchangeable). Tags let you apply categories

to documents without moving them to another location, and a given document can have as many tags as you need.

Any tags you've applied in the Finder stay with the document or folder when you import it in to DEVONthink; likewise, any tags you apply in DEVONthink turn into Finder tags when you export a document or group (or drag it from DEVONthink to the Finder). Furthermore, any tags you apply to indexed items appear as Finder tags on those items.

Use the Tag Bar

You create a tag by applying it to a document. There are numerous ways to do this, of which the easiest is usually as follows:

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

Tip: For faster access, you can choose Edit > Tags (or press Control-Option-Return) to display the tag bar if it isn't already visible and place the insertion point in it so you can begin typing immediately.

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

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

Tip: A new feature in DEVONthink 4 is the Data > Tags > Assign Existing Tags command, which looks for existing tags that may be relevant to the selected document(s) and applies them. It doesn't propose any new tags.

Use Autocompletion

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

Use Pop-up Tag Menus

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

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

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

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

Work with Group Tags

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

These tags behave much like ordinary tags. Use the pop-up menu to reveal the group in the current view, to remove the current group tag,

or to apply related tags. (If you remove a group tag, DEVONthink moves the document out of the selected group; if you remove all the group tags, the document moves to the database's inbox.)

Use the Tags List

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

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

You can do the following in the Tags list:

- **Rename a tag:** Select it, then click its name again to make it editable, and type a new name. The new name applies to all documents with that tag.
- **Assign a tag to a document:** If you drag a document to a tag in the Tags list, DEVONthink assigns that tag to the document.
- **Move a tag:** Tags can contain other tags, such that applying a "child" tag to a document also applies all its "parent" tags. In the Tags list, you can drag and drop tags just as you would do for groups to rearrange their hierarchical structure.

Use the Tags Inspector

Another way to view and add tags is to use the new Tags inspector (Tools > Inspectors > Tags, **Figure 57**). At the top is a field in which you can manually enter new tags. Next is a list that shows both the tags already applied to a document (in blue) and new tags you may want to add (in gray with a dotted outline). To add a single tag, double-click it. To add all suggested tags, click Add All or press Control-A. To remove all existing tags (but leave suggestions in place), click Remove All or press Control-R.

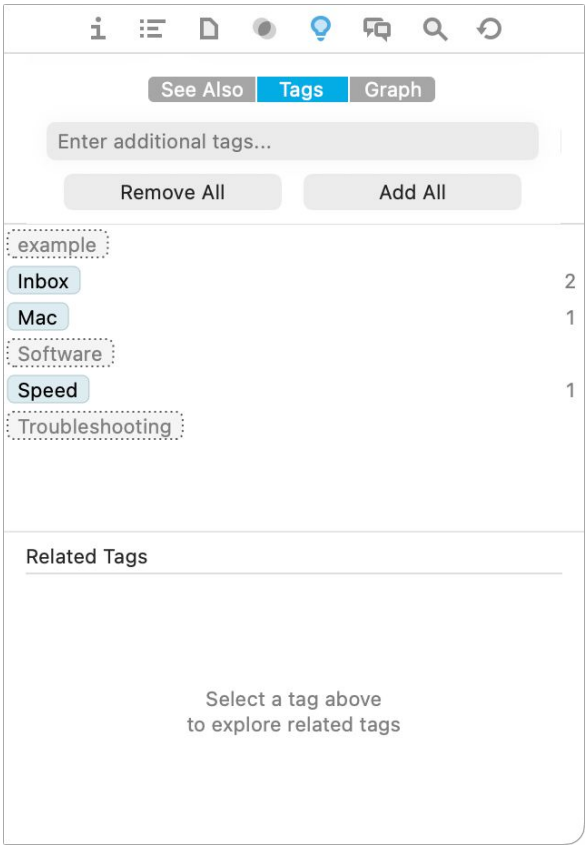

Figure 57: The Tags inspector proposes new tags for documents.

If you select an existing tag, the Related Tags view at the bottom displays a diagram showing tags related to that one because they appear together in one or more documents.

> **Note:** Unlike the Data > Tags > Add Chat Suggestions to Documents command (in DEVONthink Pro and Server), this inspector uses DEVONthink's built-in AI tools to suggest tags.

Apply Image Tags Automatically

DEVONthink can automatically tag images by analyzing them using Apple's machine learning to make educated guesses about their content. (This relies on technology used in Photos, which is not a part of Apple Intelligence.) To try this, select an image and choose Data > Tags > Add Vision Suggestions to Images. (This command is also available in smart rules.) Although you might have better luck, my results with this feature have been so-so. For example, I tried it on a photo I took in Redwoods National Forest in northern California and

got the tag “rainforest.” A photo of a nearby roadside attraction, called the One-Log House, got a tag of “motel.”

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

Using Labels and Flags

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

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

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

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

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

Work with Metadata

Numerous document attributes I've already discussed (such as title, tags, labels, flags, read/unread status, "Exclude from" settings, date added, and so on) can be considered *metadata*—that is, information *about* the document as opposed to the *contents* of the document. Most types of metadata can be applied or edited using the various tabs of the Info Inspector, particularly the Generic inspector (**Figure 58**), which you can reach by choosing Tools > Inspectors > Generic (Control-1).

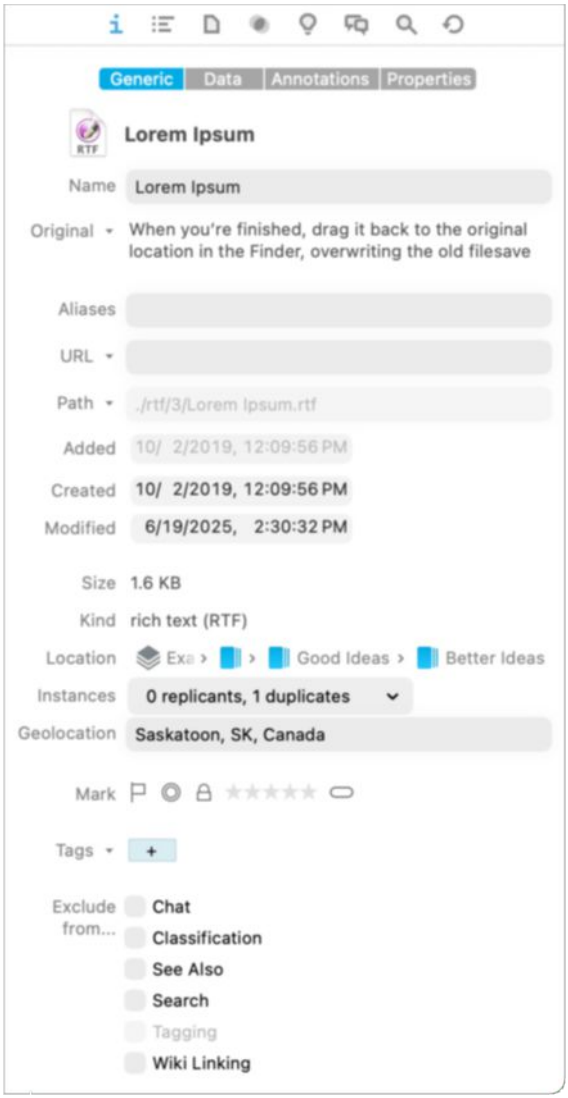

Figure 58: Add or edit metadata in the Generic inspector.

Although most types of metadata you can adjust here are either self-explanatory or described elsewhere in this book, I want to add details

about two of them: geolocation (shown in the Geolocation field) and, for Pro and Server users, custom metadata (shown on the Data tab).

Geolocation Data

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

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

DEVONthink also has a couple of other neat geolocation tricks:

- To display a map showing pins for each document with geolocation data in the current selection in the Navigate sidebar, choose Tools > Filter > Maps. The map (**Figure 59**) appears at the bottom.

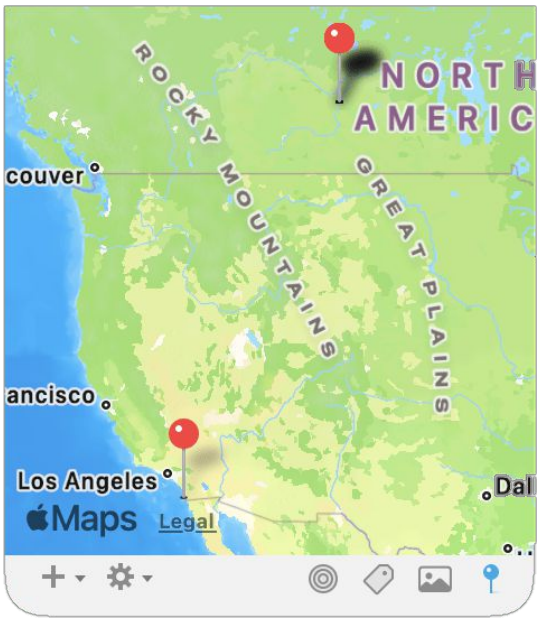

Figure 59: This map has pins for each document with stored geolocation data in the current view.

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

Note: If you want DEVONthink to be able to scan and use geolocation data, you must first go to System Settings > Privacy & Security > Location Services and enable DEVONthink.

Custom Metadata

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

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

1. Go to Settings > Data (**Figure 60**).

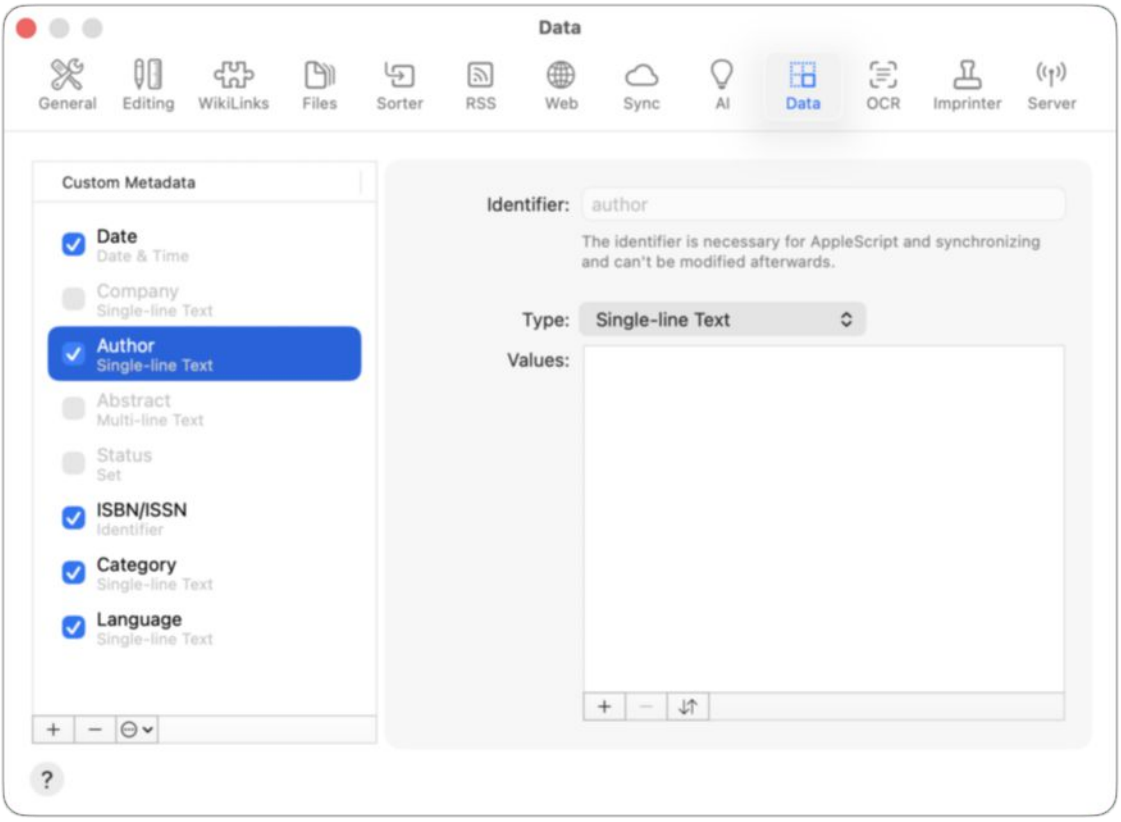

Figure 60: Configure custom metadata fields on the Data setting pane.

2. If you want to use any of the predefined custom fields, simply select the checkboxes next to their names. (If no predefined custom fields are present, choose Add Default Templates from the Action ⚙ pop-up menu to restore them.)

3. To add a custom field of your own:

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

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

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

Once you've done this, you can apply your custom metadata to any document by visiting the Data tab of its Info inspector (**Figure 61**), where the extra fields appear. (You can jump here by choosing Tools > Inspectors > Data or pressing Control-2.)

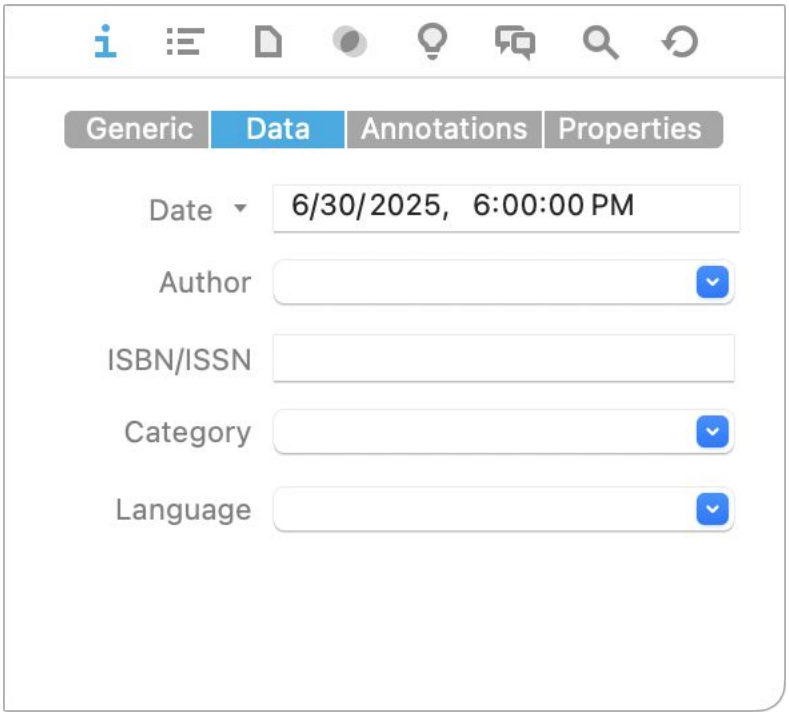

Figure 61: Apply custom metadata to documents on the Data inspector.

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

Scan Barcodes

If an image or any of the first four pages of a PDF contains a barcode, DEVONthink Pro or Server can *sometimes* decode it if it's sufficiently prominent. Select the image and choose Data > Recognition > Scan Barcodes; the command is also available in smart rules. If DEVONthink is able to find and analyze the barcode, its value appears in a Barcode custom metadata field. You can also ask DEVONthink to scan for barcodes automatically upon importing files by going to Settings > Files > Import and checking "Scan barcodes."

Make a Metadata Table

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

Work with Highlights

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

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

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

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

Work with Item Links and WikiLinks

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

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

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

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

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

Create a Standard Item Link

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

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

Your options are:

- **Start from the link's source:** Select some text in a rich text document, right-click (or Control-click) it, and choose Link to > *Destination* (that is, any group, tag, or document, in any open database) from the contextual menu. The text you selected becomes a clickable link to the destination you chose.
- **Start from the link's destination:** Select a document in your database and choose Edit > Copy Item Link (⌘-Control-Option-C) to put a link to that document on the clipboard. Then place your insertion point in any rich text document and choose Edit > Paste (⌘-V) to paste a link to the first document at that location.
- **Drag and drop:** Double-click a rich text document to open it in its own window. Then ⌘-Option-drag a document from elsewhere in your database and drop it at the spot where you want the link to appear. The link appears as the linked file's name.
- **Type >>:** If you type two greater-than symbols (>>) followed by at least one letter or number, DEVONthink displays a pop-up menu of documents, groups, and tags from the current database. Use the arrow keys to select one from the keyboard and press Return to insert an item link to that location.

Documents containing links *to* other documents display an outgoing link icon in item lists; documents with links *from* other documents display an incoming link icon in item lists. Behind the scenes, DEVONthink calculates the number of incoming and outgoing links in each document, which can then be referenced in searches, smart groups, and list sorting.

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

If the name of a document changes, you might want to update links to that document in other documents so the name matches. To do this, select the document(s) containing the link(s) to documents whose

names have changed and choose Tools > Item Links > Update Names of Item Links. If you *always* want link names to update themselves automatically when the documents they link to are renamed, go to Settings > WikiLinks and select "Update name of item links automatically."

Create a WikiLink

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

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

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

To adjust the text and variables used in this template, go to Settings > WikiLinks (**Figure 62**). Make your desired changes in the Template field at the bottom of the window. The template can include placeholders; refer back to Using Placeholders.

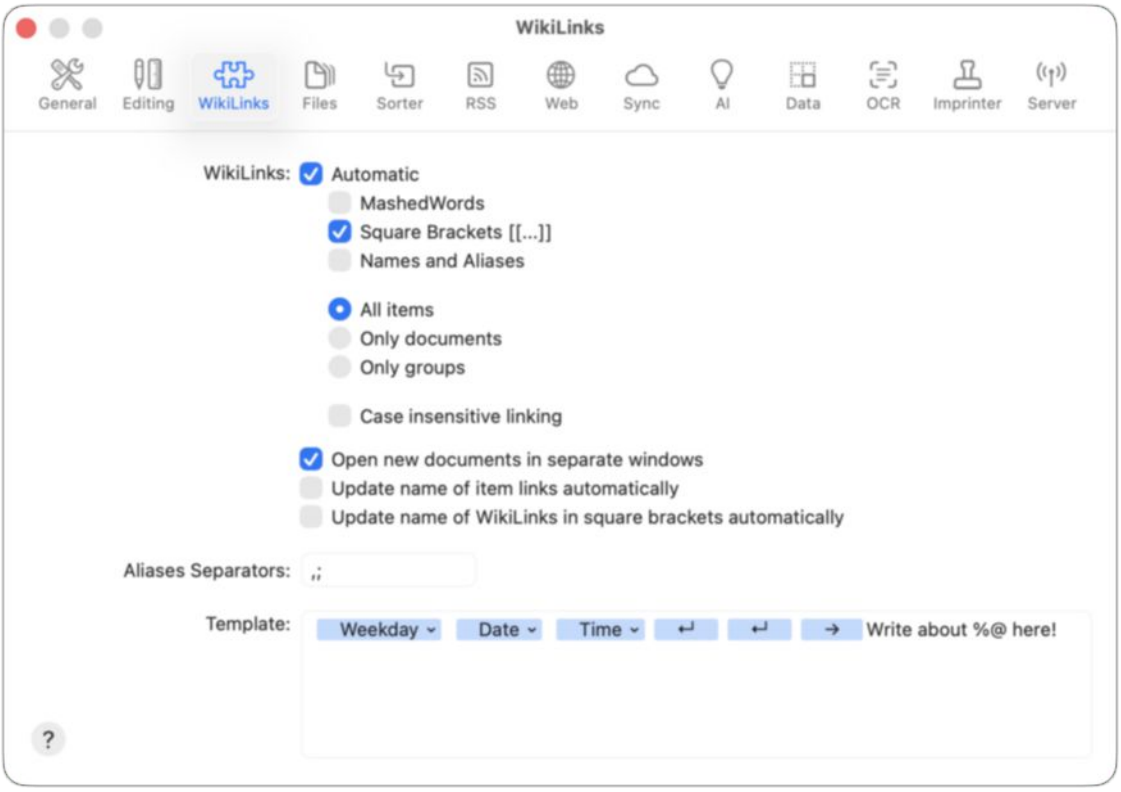

Figure 62: Adjust settings for WikiLink behavior in the WikiLinks setting pane.

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

- **MashedWords:** DEVONthink creates links automatically only when you type a string with no spaces and a capital letter in the middle (sometimes called CamelCase or an InterCap). For example, type `AppleScript` and that word becomes a WikiLink to a (new or existing) document named AppleScript.

- **Square Brackets [[...]]:** DEVONthink creates links automatically only when you type a string surrounded by double square brackets, like this: `[[lorem ipsum]]`. (This convention comes from Wikipedia.)

Note: MashedWords and double square brackets can be used at the same time.

- **Names and Aliases:** With this (default) setting, DEVONthink creates a link to *any* document in your database as soon as you

type its full and exact name. DEVONthink also creates links automatically to any string of text that you've defined as an alias for a document. (To create an alias, which in DEVONthink is simply an alternative name, select a document and choose Tools > Get Info, ⌘-Shift-I, or use the Info inspector. Type one or more aliases, separated by commas or semicolons, in the Aliases field. To change the separator options, see the Aliases Separators item below.)

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

Tip: To toggle automatic WikiLinks in the current document, regardless of how your settings are set, open it in a separate window and choose Format > Wiki Linking.

DEVONthink offers two settings for working with automatic WikiLinks:

- **Item type:** By default, you can create automatic WikiLinks to either documents or groups (including tags). To change the behavior so that automatic links are created only to documents or only to groups, select the "Only documents" or "Only groups" radio button, respectively. To change back to the default, select "All items."
- **Case sensitivity:** By default, the names of documents in automatic links must match exactly, including case. To make linking case-insensitive (so the text "apple" would link to a document named Apple, for example), select "Case insensitive linking."

Finally, there are four miscellaneous settings for working with WikiLinks (and item links):

- **Open new documents in separate windows:** You can adjust DEVONthink's behavior when you click a WikiLink. If this box is checked, DEVONthink opens a new window the first time you click a WikiLink for a document that didn't previously exist. If it's unchecked, as it is by default, the new document opens in the current view, replacing the existing document.

- **Update name of item links automatically:** When this is checked and the name of a document changes, any links to that document in other documents change to match.
- **Update name of WikiLinks in square brackets automatically:** When the name of a document to which a Wiki-Link points changes, update the name of that document where it appears in square brackets.
- **Aliases Separators:** As I mentioned about a page back, an alias is an alternative name for a document created in the Info inspector. You can type multiple aliases separated by commas or semicolons, by default, but if you want other separator characters, type them here.

If you want to convert WikiLinks to standard item links, select one or more documents and choose Tools > Item Links > Convert WikiLinks to Item Links.

Deep Linking with Selection Links and Annotation Links

DEVONthink can create and use *deep links*, meaning links to specific spots *within* PDF documents. You can use a standard item link or WikiLink to link to a PDF, but if you want to link to a particular paragraph within that document, a deep link is what you need.

To create a deep link to a specific piece of text within a PDF, select the text, right-click or Control-click it, and choose Copy Selection Link from the contextual menu. You can then paste that link into another document (or even another app on your Mac). When you click the link, DEVONthink not only displays the document in question but also scrolls to, and selects, the linked text.

Similarly, in a PDF with annotations, you can right-click or Control-click an annotation and choose Copy Annotation Link from the contextual menu to get a link to that annotation.

Move Data Between Databases

Just as you can drag items from one group to another, you can drag items from one database to another. (And note: this really does *move*

items, deleting them from one database and adding them to the other, although you can also *copy* items if you prefer, as I describe ahead.)

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

- With the Navigate sidebar visible (View > Navigate), drag the item(s) to the location of your choice in the other database. This moves them from the current database to the other database's inbox.
- Assuming you have enough room on your screen, open a new window for the second database (choose File > New Window > *Name of Other Database*) and then drag the item(s) from one window into the desired location in the other.

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

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

Split and Merge Documents

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

Split a Document

To split a document, put the insertion point at the location where you want to divide the document in two and choose Tools > Split Docu-

ment. DEVONthink instantly creates two documents—one with the original name that contains the material before the insertion point, and another with the original name plus 2 and the material after the insertion point.

Note: Splitting in this manner works with plain and rich text documents and Markdown documents. To split PDFs, use commands on the Tools > Split PDF submenu; see Edit PDFs.

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

Merge Documents

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

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

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

Use Versioning

Many apps—including the likes of TextEdit, Pages, Numbers, and Keynote—support Apple's system-level versioning system, in which a new version of each document is created automatically every time you save it. You can go back to earlier versions using a Time Machine–like interface that lets you view and pick to restore from among them.

DEVONthink 4 adds its own spin on versioning to accomplish much the same purpose. Once it's enabled, DEVONthink stores an extra copy of a document each time you edit and save it, and you can go back to view (or restore) earlier versions. And, it even works with indexed files, as long as changes to those files are made from within DEVONthink.

Versioning is disabled by default, and must be manually enabled for each database. To enable versioning, select a database, choose File > Database Properties, and select Enable Versioning. You can also change how many versions of each document are stored (10 by default), the maximum size of a document eligible for versioning (100 MB by default), and when, if ever, to remove old versions (after one week by default) in Settings > Files > General.

Note: Merely opening and saving a document doesn't create a new version—the document must actually change, too. DEVONthink waits two minutes between edits to save versions, in order to reduce the number of versions stored.

To view previous versions of a document, go to Tools > Inspectors > Versions. Select a version to display its contents. You can also click Quick Look to view the file in a separate window, or click Restore to restore the selected version while also saving a copy of the current version, so you don't risk losing any data. To remove a version, right-click (or Control-click) it and choose Remove Version. To remove all versions besides the current one, choose Remove All Versions.

Find Your Information

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

Use Filters

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

Four filter categories exist: info (which encompasses dates and *marks*—flag, label, read/unread state, and locked/unlocked state), tags, multimedia, and maps. You can display these filters at the bottom of the Navigate sidebar by choosing Tools > Filter > Info (Control-Shift-I), Tools > Filter > Tags (Control-Shift-T), Tools > Filter > Multimedia (Control-Shift-M), or Tools > Filter > Maps (Control-Shift-G)—or click the Info , Tags , Multimedia , or Maps icon at the bottom of the sidebar. **Figure 63** shows each of the filter views.

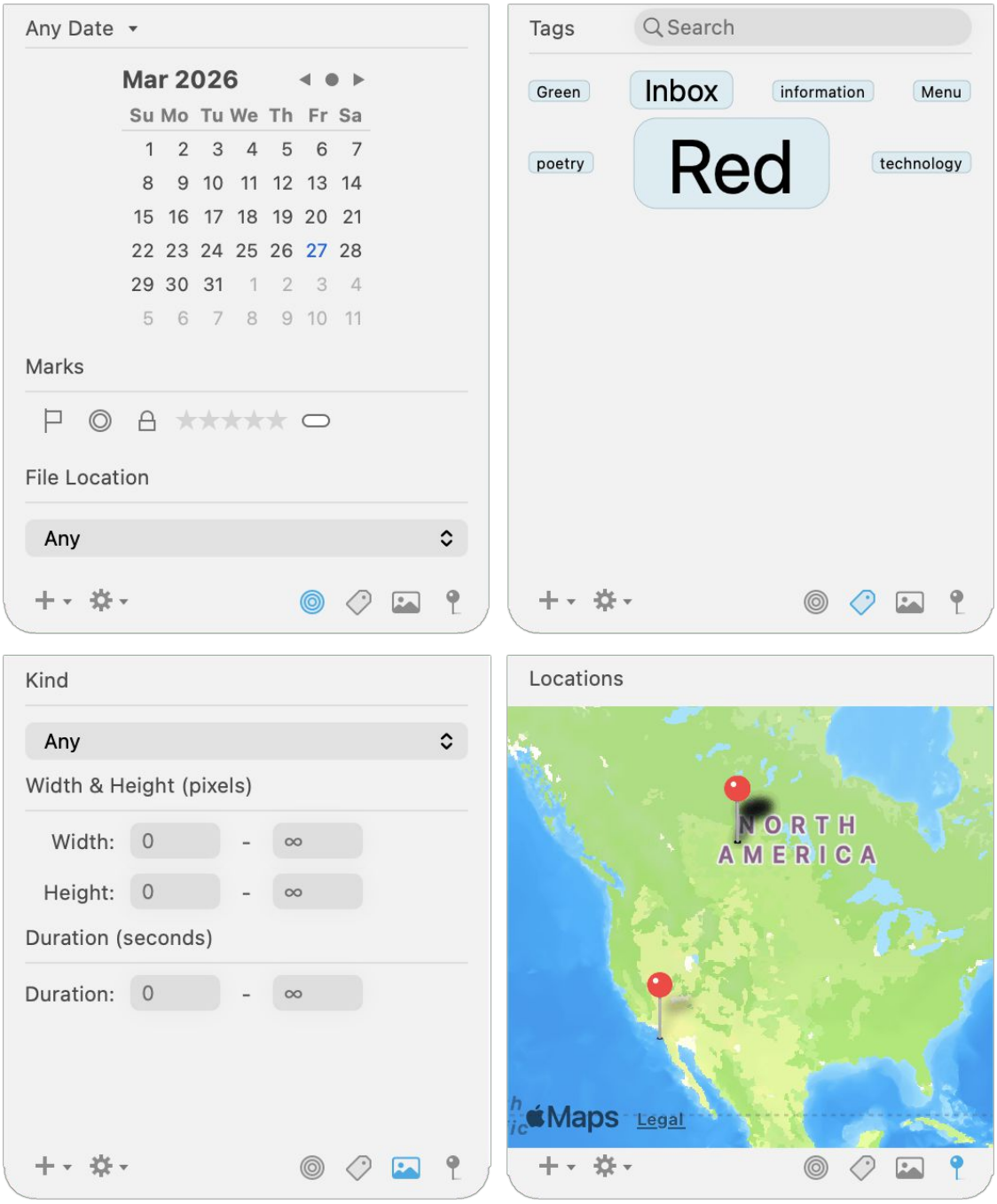

Figure 63: Filters, upper row: info and tags; lower row: multimedia, and maps.

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

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

Or, click the flag ⚐, read ◎, or locked 🔒 icon to show only flagged, unread, or locked documents, respectively, in the current view. Click a star ★★★★★ to add a rating. Or click the label ⬭ icon and choose a label from the pop-up menu to display only items with that label. You can also choose Indexed or Imported from the File Location pop-up menu to filter by those locations, or Any to show all locations.

- **Tags:** Click a tag to display only items in the current view that include that tag. To narrow down further, continue clicking to add more tags. To remove a single tag from the filter, delete it from the information bar; to remove all tags from the filter, click Reset on information bar.
- **Multimedia:** From the Kind pop-up menu, choose Any, Image, Video, or Audio. Then fill in the parameters you want to use for filtering: Width, Height, and/or Duration (each of which has both a minimum and maximum value).
- **Maps:** Click a pin on the map to display only the items (such as photos) with that geolocation data.

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

Perform a Simple Search

Most searches in DEVONthink are simple and straightforward—and the process couldn't be easier. Type your search term into the search field on the toolbar, and DEVONthink almost instantly returns matching documents from anywhere in the current database—with default settings, you need not even press Return (**Figure 64**).

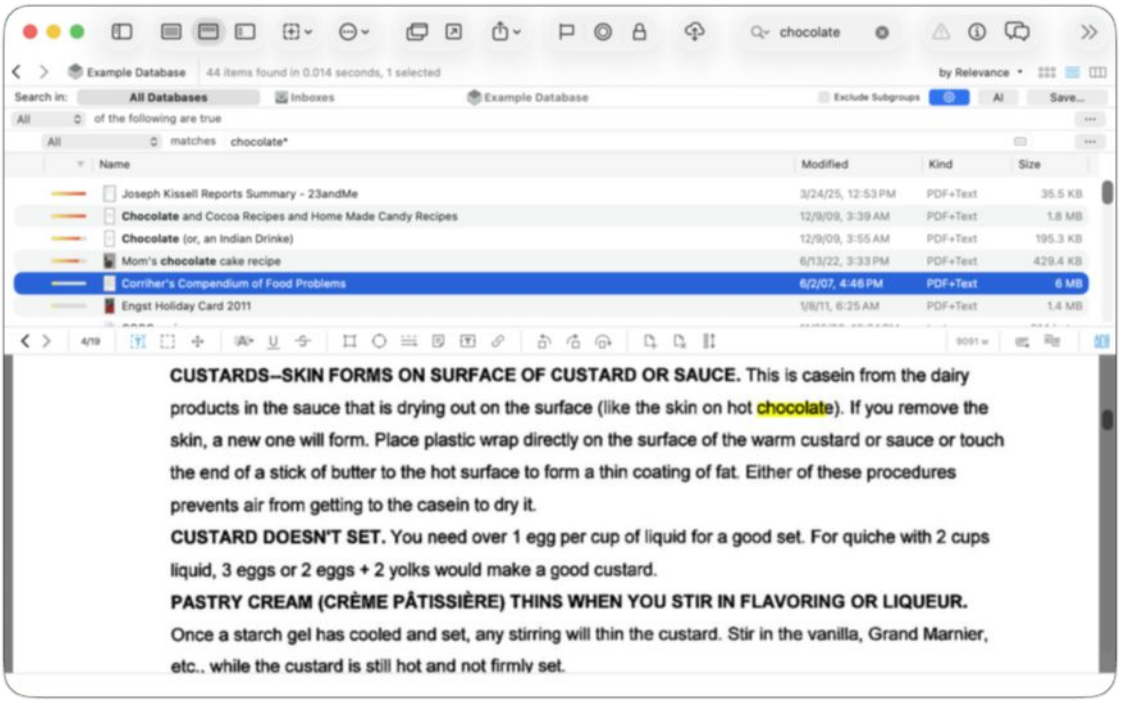

Figure 64: Type a term in the search box in the upper-right corner for a super-fast search.

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

Search Syntax

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

DEVONthink also supports *search prefixes*, which allow you to target specific pieces of metadata. A search prefix, as the name suggests, is a term that goes at the beginning of your search string. Of the dozens of options, a few self-explanatory examples are `rating:2`, `created:2024-06-15`, `flag:unflagged`, `tags:Funny`, and `kind:rtf`.

Search operators are symbols such as -, <, >, =, !=, >=, and <= that can be used with search prefixes to specify ranges or comparisons, for example, `rating:3-5` (ratings of three to five stars), `created:>2 weeks` (creation date greater than—more recent than—two weeks ago), and `size:<=20 MB` (file size less than or equal to 20 MB).

See DEVONthink's documentation, especially the appendixes Search Prefixes and Search Operators, for details.

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

Refine a Search with Search Options

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

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

- **Live while typing:** When this is selected, as it is by default, DEVONthink starts returning results immediately as you type. If you deselect this, you must press Return or Enter to complete your search.

- **Partial matches while typing:** Keep this option selected to have DEVONthink return items containing words beginning with whatever letters you've typed—even without pressing Return or Enter.

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

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

- **Ignore Diacritics:** With this option selected, DEVONthink ignores all diacritical marks (such as umlauts and accents) when searching, so, for instance, a search for `creme brulee` with this option enabled will match a document containing "crème brûlée", and vice versa.

- **Fuzzy Word Comparison:** With Fuzzy Word Comparison on, DEVONthink looks for alternative spellings with similar sounds (although I've rarely found this option to produce any useful effects).

- **Related Words:** When this is enabled, DEVONthink uses words similar in meaning to those you've entered. (You can't use Related Words and Fuzzy Word Comparison at the same time.)

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

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

> **Tip:** In lieu of choosing your search scope from a pop-up menu, you can type a shortcut in the search field—the letter `s` followed by a colon and one of the following words: `all`, `database`, `databases`, `inbox` (that, is the global Inbox), `inboxes`, `tags`, `trash`, `selection`, or a database name. For example, the search term `robots s:databases` would search for the word "robots" in all databases.

At the bottom, there may be additional items:

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

Use Search Prefixes

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

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

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

Do an Advanced Search

Whether or not you modify your search criteria or use search prefixes as described above, you can extend a search with much more elaborate options than the search field offers alone. To do this, use the bar that appears below the path bar when you start searching (**Figure 65**). Although the DEVONthink documentation doesn’t give it an official name, I call it the search scope bar, since it displays controls allowing you to change the scope of your search.

Figure 65: The search scope bar appears below the path bar after you enter a search term.

One thing you can do immediately, if you like, is restrict the scope of the search to top-level items within the currently selected group, ignoring the contents of any subgroups. To do this, check the “Exclude Subgroups” box.

Add Search Criteria

Near the right side of the search scope bar is a gear-shaped Advanced button. Click that to expand the view with even more options, as shown in **Figure 66**.

Figure 66: The search scope bar after you've clicked the Advanced button.

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

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

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

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

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

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

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

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

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

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

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

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

Perform an AI Search

New in DEVONthink 4 Pro and Server is an AI search feature. Next to the Advanced button on the search scope bar is a tiny AI button. Click this button to display the Search assistant (**Figure 67**). In the Prompt field, *describe* what you're looking for rather than using specific search prefixes, criteria, or other options. Press Return to convert your plain-language description into DEVONthink's internal search syntax. Then click Search to perform the search.

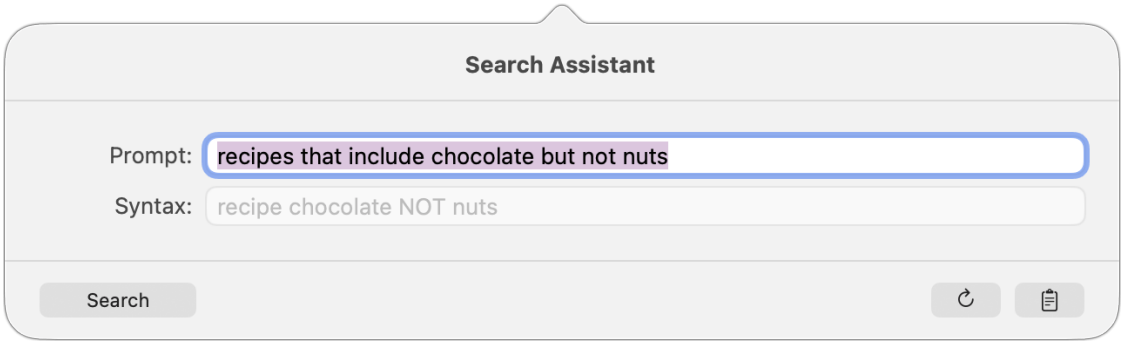

Figure 67: Need help with DEVONthink's search syntax? The Search assistant uses AI to figure out what you're looking for.

As with similar popovers, you can drag the "point" of the Search assistant to turn it into a separate floating window.

To customize which sources AI search consults and which engine it uses for Web and Wikipedia searches, go to Settings > AI > Search.

Use Smart Groups

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

Adding Premade Smart Groups

DEVONthink includes a few preinstalled global smart groups, listed under Smart Groups in the sidebar: Today, Recently Added, Due This Week, Top Hits, History, and Unread. (If you delete any of these, you can restore them by clicking the New pop-up menu at the bottom of the sidebar and choosing Add Default Smart Groups.)

Each new database also contains, by default, smart groups for All Images, All PDF Documents, and Duplicates. To add any of numerous other prebuilt smart groups, choose one from the Data > New from Template > Smart Groups submenu.

Save an Advanced Search

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

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

Use the Smart Group Editor

If you don't want to start with an advanced search, you can build a smart group from scratch; doing so gives you a few extra options over an advanced search. If you're familiar with creating smart folders in the Finder, smart playlists in Music, or smart mailboxes in Mail, you should be at home in the Smart Group Editor.

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

1. Choose Data > New > Smart Group.
2. In the Smart Group Editor (**Figure 68**), enter a name for your smart group.

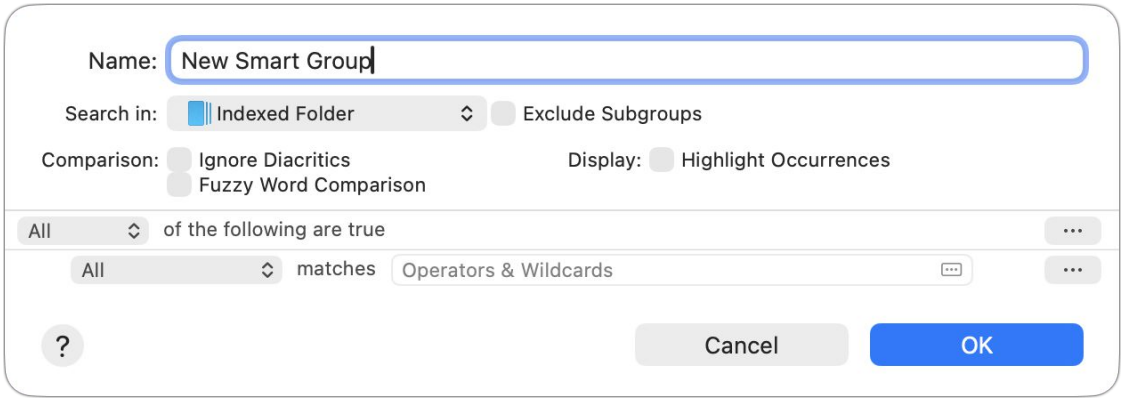

Figure 68: Use the Smart Group Editor to construct more elaborate smart groups.

3. Choose a search location from the "Search in" pop-up menu and optionally check Ignore Diacritics and/or Fuzzy Word Comparison—all these options work just as for other types of searches.

4. Optionally select Highlight Occurrences to highlight matching terms in the documents themselves, just as during a regular search.

5. Enter your search criteria just as in an advanced search.

6. Click OK.

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

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

Note: If your smart group involves date criteria, DEVONthink gives it a clock icon.

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

Modify or Delete a Smart Group

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

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

Search Within a Document

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

To use the Search inspector, make sure a document is selected or open, and then press ⌘-F or choose Edit > Find > Find. (You can also choose Tools > Inspectors > Search (Control-U) or click the Search icon at the top of the inspector.) The Search inspector (**Figure 69**) appears.

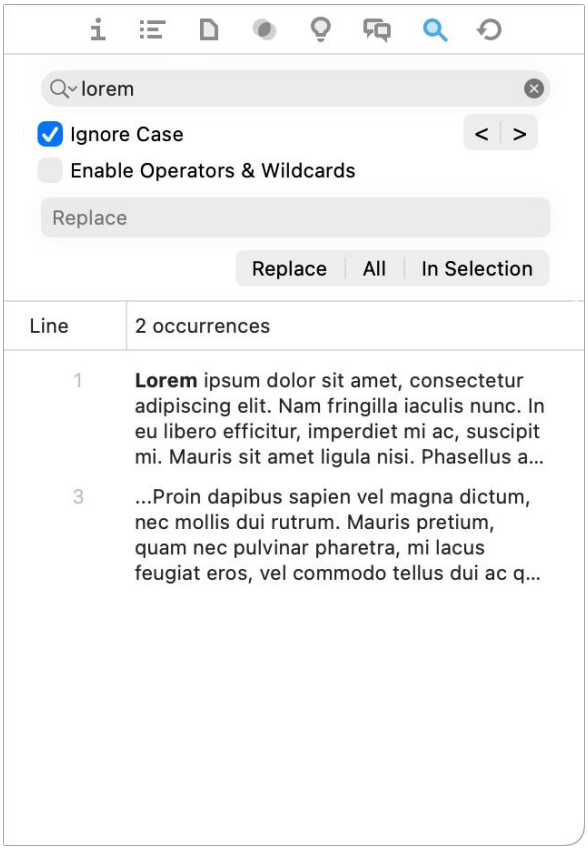

Figure 69: The Search inspector lets you do simple searches and replacements within the selected document.

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

There are two search options:

- **Ignore Case:** Selected by default, this makes searching case-insensitive.
- **Enable Operators & Wildcards:** Deselected by default; if you select it, the Search inspector lets you use operators such as `AND`, `OR`, `NOT`, and `NEAR`, and wildcards such as `*`, when searching within documents. See Searching for details.

To do a find-and-replace, enter replacement text in the Replace field and click Replace (for just the current or next occurrence), All (to

replace all occurrences), or In Selection (to replace all occurrences within the currently selected text).

Search Using the Concordance

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

To use the Concordance in a single document, select it and choose Tools > Inspectors > List (Control-8). The List tab of the Concordance inspector appears on the right side of the window (**Figure 70**) with every word listed by frequency (number of occurrences).

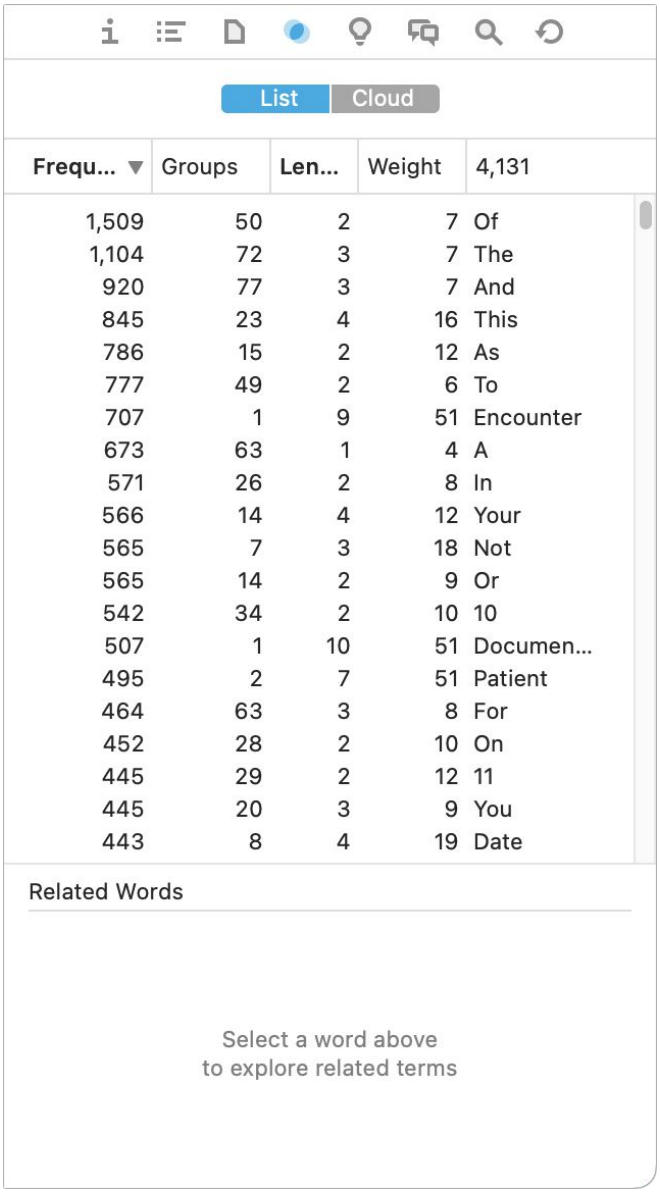

Figure 70: The Concordance inspector (List tab shown here) shows all the words in your document, sorted by frequency.

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

- **Frequency:** The number of times this word appears in the document.
- **Groups:** The number of groups in this database that contain this word.
- **Length:** The number of characters in the word.
- **Weight:** An indication of the word's relevance in a given database.

Another, unlabeled column lists all the words, allowing you to sort in forward or reverse alphabetical order. The number at the top indicates the total number of unique words in the document.

Select a word in the list, and DEVONthink highlights each occurrence in the document. You can select multiple words by ⌘-clicking. If you select a single word, the (resizable) Related Words area at the bottom (**Figure 71**) shows a graphical depiction of other words that frequently appear in proximity to this one *throughout your database*—not necessarily in this document.

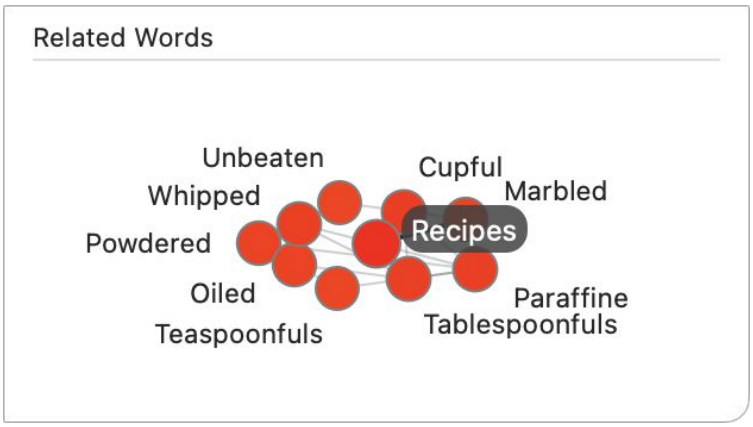

Figure 71: The Related Words view shows you other words that frequently cooccur with the selected word (in this case, "Recipes").

Although the Concordance's list view is generally the most useful, there are two more views. Click the Cloud tab at the top of the inspector to display a word cloud, in which each term's size is relative to its weight.

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

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

Work with Your Information

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

Edit Documents in DEVONthink

DEVONthink can edit a wide variety of document types. Just as when viewing documents, you can edit a document directly in the view/edit pane, or double-click it to open it in a separate window. Either way, before you can make changes to a document, it must be in a writable (as opposed to read-only) state. If you see a read-only icon on the navigation bar, check the Info inspector to see if the document is locked; if so, click the lock so it displays the unlocked icon. But keep in mind that some documents can't be edited, even if they're unlocked—this is true, for example, of movies, spreadsheets, and imported email messages.

To access the tools you'll need when editing certain document types, you use the editing bar, which replaces the controls on the navigation bar when you click the Show Editing Bar icon. This bar contains context-sensitive formatting controls that vary with the kind of document (see **Figure 72**). In most cases, there are other ways to perform the associated editing tasks (for example, using commands on the Format menu and its submenus), but it's often useful to have those controls available in this handy area right above the body of the document.

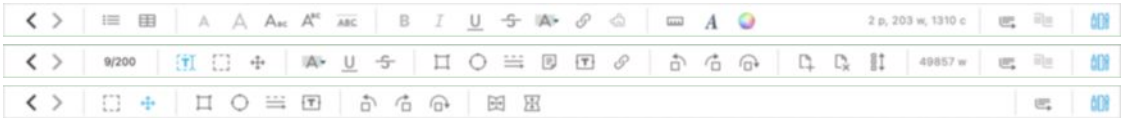

Figure 72: The editing bar as it appears for a rich text document (top), a PDF (middle), and an image (bottom).

With those preliminaries out of the way, let's look at a few of the most common document types you may want to edit.

Edit Text Documents

To edit a plain text or rich text document (or formatted note) in DEVONthink, use the view/edit pane or double-click it to open the file in a separate window (**Figure 73**), which gives you a custom—and customizable—toolbar. (Choose View > Customize Toolbar to adjust the toolbar's buttons to your liking.)

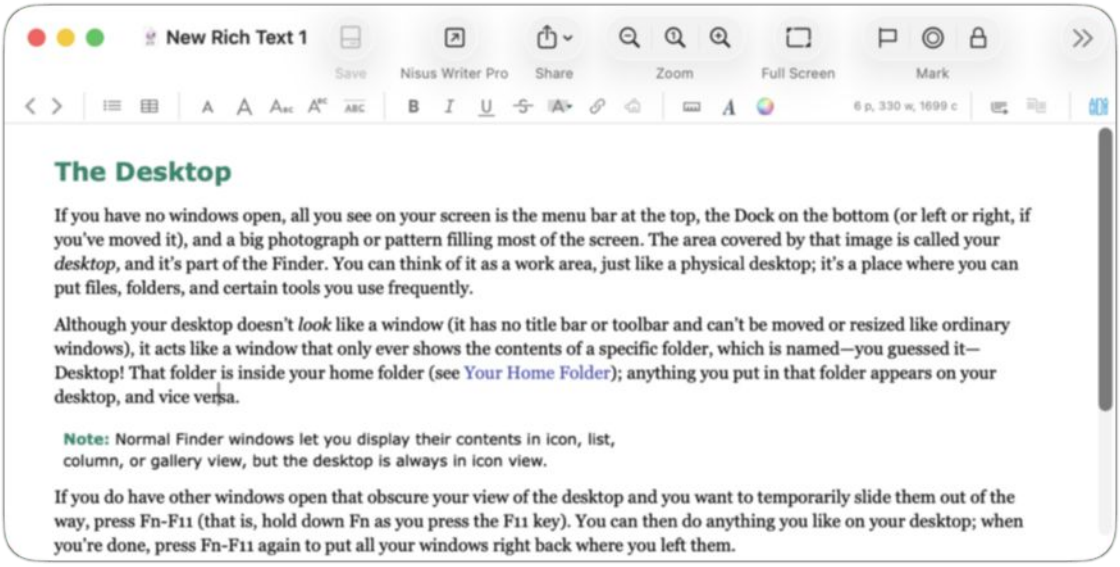

Figure 73: Editing a rich text document in its own window gives you access to a custom toolbar (not to mention the editing bar and optional format bar, shown here).

When you open a rich text document in a separate window (as in the image above), the editing bar appears automatically, though you can hide it if you prefer by clicking the Hide Editing Bar icon.

Whether or not you're using a separate window, you can also optionally display another set of tools called the format bar (see **Figure 74**), which appears right beneath the toolbar and contains font size and style pop-up menus, alignment buttons, and similar controls. To toggle

the display of this bar, choose Format > Show Format Bar (or Hide Format Bar), ⌘-Shift-F.

Figure 74: The format bar.

The format bar is theoretically applicable only to documents with styled text, but that doesn't apply to formatted notes, HTML, or Markdown documents—just rich text documents. On the other hand, oddly enough, it is available with plain text documents, though only when they're displayed in separate windows. (Keep in mind that, although you can modify the display of the text in plain text documents using these controls, the style changes aren't saved with the document—it's still just plain text.)

DEVONthink's text editing capabilities are almost identical to those in TextEdit (although some commands are found in slightly different locations, or have different keyboard shortcuts), so you should feel at home. All the important formatting commands are on the Format menu or one of its submenus, just as in TextEdit. In short, for plain text and rich text documents (as well as formatted notes), there's not much to say—it just works.

Note: DEVONthink 4 added a "Typewriter-like scrolling" option for plain text, rich text, and Markdown documents, which tries to keep the active line more or less centered if possible. To try it, choose Format > Typewriter-like Scrolling (Control-Option-T).

Edit HTML and Markdown Documents

DEVONthink lets you edit HTML documents, Markdown documents, and web archives (which bundle HTML along with graphics and other resources in a single file) in much the same way as plain text and rich text documents. However, these three web-related formats share a unique characteristic: they are based on human-readable source code. You can see a preview of the final, rendered appearance; edit the source; or even view both source and preview at the same time, with live updating as you make changes.

To switch modes, use the icons on the right side of the navigation bar or the commands on the View > Document Display submenu:

- **Preview:** The default mode, preview shows your document as it will appear with all styles, links, graphics, and so on. For preview mode, click the Preview icon or choose View > Document Display > Preview (⌘-Control-P).
- **Source:** Shows the underlying HTML or Markdown source of the document. For source mode, click the Source icon or choose View > Document Display > Source (⌘-Control-X).
- **Side-by-Side:** Shows a split view with the source on the left and the corresponding rendered page on the right (**Figure 75**). For side-by-side mode, click the Side-by-Side icon or choose View > Document Display > Side-by-Side (⌘-Control-Y).

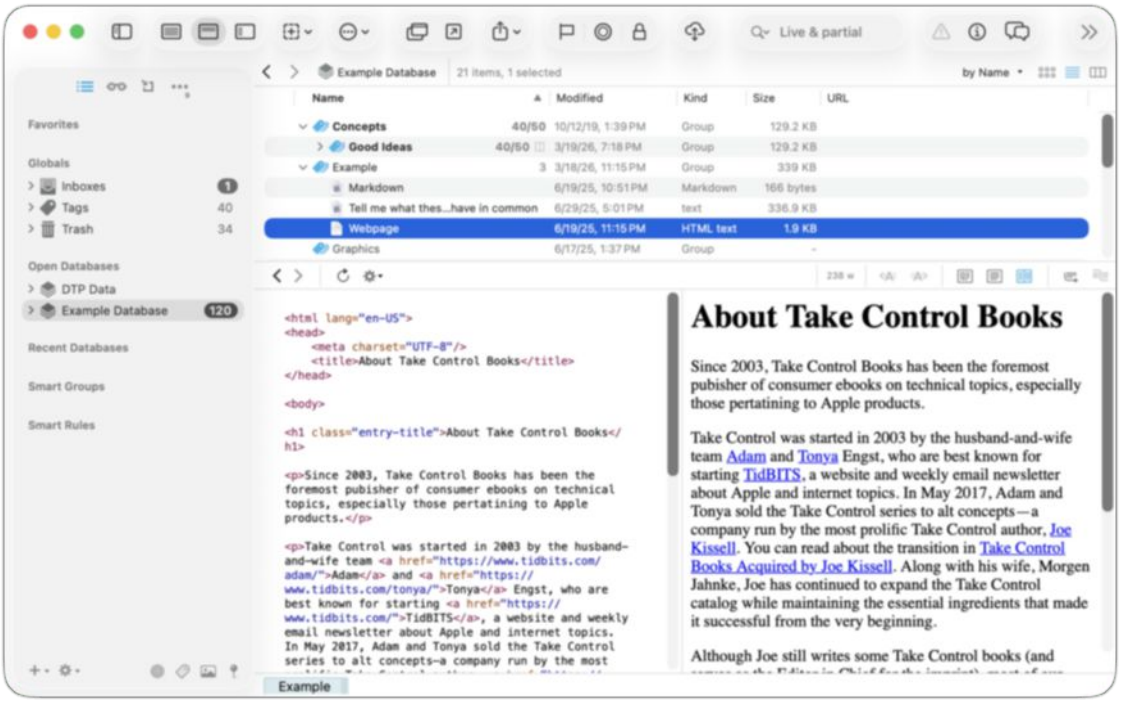

Figure 75: Side-by-side view lets you see the source of HTML (shown here), Markdown, or web archive files beside the rendered content.

WYSYWIG Source Editing

The source view is partially WYSIWYG: for simple formatting such as blockquotes, code blocks, links, and images, applying the relevant tag also produces styled text. If you prefer to see only plain text, disable this by going to Settings > Files > Markdown and deselecting "Syntax highlighting." You can separately disable "WYSIWYG tables, images links & MathJAX" in the same place.

When working in side-by-side mode, especially with Markdown documents, keep in mind that the two panes may not always scroll in sync; in some cases, you may have to manually scroll each pane to the same spot.

Tip: If you drop an image file from the Finder into the source of a Markdown document, the app adds a valid Markdown link to that graphic, with the image's name as a caption. If you drop an email message from Apple Mail or an event from Calendar into a Markdown document, DEVONthink adds a link to the original message or event.

DEVONthink includes the Prism syntax highlighting framework for Markdown documents. That means the preview pane in DEVONthink can show code examples embedded in your Markdown code with automatic syntax highlighting. To enable it, go to Settings > Files > Markdown and check "Prism support" in the Extensions section. Once you've done this, open a Markdown document in DEVONthink, insert a line just before the code example, and type three backticks (`) followed by the name of the language your code example is in. For example:

```javascript
```

Supported languages are AppleScript, AWK, bash, C, C++, C#, Go, Java, JavaScript, Objective-C, Python, Perl, PHP, Ruby, Rust, Swift, and Typescript. An example of how this works with a JavaScript snippet appears in **Figure 76**.

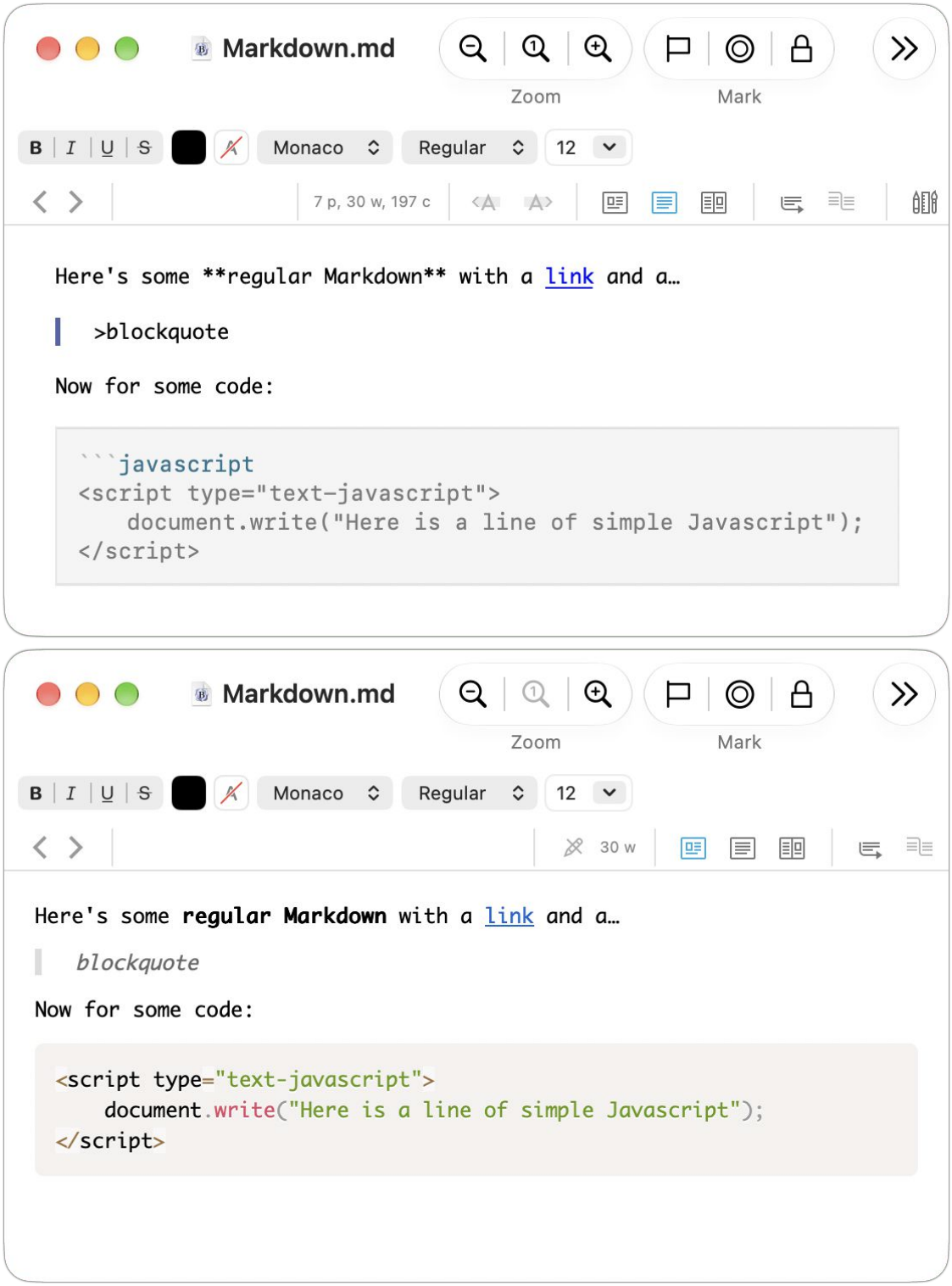

Figure 76: Plain Markdown with a bit of embedded code (top) can appear, in preview mode, with syntax coloring (bottom).

DEVONthink also supports the MathJAX framework, which lets Markdown previews display fully formatted mathematical equations. To enable it, go to Settings > Files > Markdown and check "MathJAX support" in the Extensions section. Then use a supported syntax such

as LaTeX or MathML in your Markdown document (for example, `$$ \sqrt[3]{\frac xy} $$`) and switch to the preview to see the rendered result.

Similarly, you can use the Mermaid charting and diagramming tool by going to Settings > Files > Markdown and checking "Mermaid support." Mermaid uses a Markdown-like syntax to create flow charts, pie charts, Gantt charts, and numerous other types of diagrams.

DEVONthink also supports *transclusion*, which means including the entire contents of one (Markdown, HTML, RTF, RTFD, formatted note, web archive, sheet, plain text, or SVG) document in another Markdown document via a special link. To transclude a document, type its name inside double curly braces (`{{myfile.md}}`) or inside double square brackets preceded by an exclamation point (`![[myfile.md]]`); or, Control-drag the document to be transcluded to the spot in your Markdown document where you want it to appear. The transcluded document is automatically converted to Markdown; you can see this in preview mode or side-by-side view.

> **Tip:** The extension in your link is optional if the filename of the transcluded file is unique.

Edit Images

When I say you can edit images in DEVONthink, I don't mean you can do the fancy things you can in Photoshop. What you can do, however, is rotate or flip an image; add line, shape, or text annotations; use the same image-manipulation tools built into Preview for adjusting overall attributes such as contrast, tint, and sharpness; and apply a few simple special effects.

> **Note:** DEVONthink supports graphics in most common formats, including JPEG, PNG, TIFF, and HEIC. When you flip or rotate an image, or copy a portion of an image, the result is saved in uncompressed TIFF format, regardless of the format of the original.

To edit an image, select the document in your database (to edit it in the view/edit pane) or double-click the document (to open it in a separate

window). Click the Show Editing Bar icon on the navigation bar to display the editing bar with graphics-specific icons; these controls are also present on the Format menu (or its submenus).

To make adjustments to the image as a whole, double-click the image (that is, the image itself, not the document title), or right-click (or Control-click) the image and choose Edit from the contextual menu. The Image Edit panel (**Figure 77**) appears.

Figure 77: Use this panel to make quick modifications to photos.

Tip: To change the magnification of the image (without altering the file itself), use one of the Zoom commands on the View menu or the right-click/Control-click contextual menu, or click a Zoom icon on the toolbar, if you've added those icons manually.

Move the sliders to adjust your image, and explore the Effects and Details tabs for more options. Switching between the Adjust and Effects tabs discards changes made before the switch, so close the panel to apply your changes before switching tabs.

After making any change to an image, be sure to save it (Data > Save or ⌘-S). Switching to another item in DEVONthink also saves your changes. To discard your changes, click Reset All.

Another way you can edit an image is to add an imprint; see Add Imprints, ahead.

Navigate PDFs

One of DEVONthink's strongest features is its extensive support for PDF documents. Elsewhere in this book, I discuss how DEVONthink can convert scanned documents into searchable PDFs (see Scan Documents). You can also rotate and zoom them just as you would any other graphic. However, you can do considerably more with PDFs.

For the moment, I want to focus on getting around within PDFs and performing a few basic tasks. Then, in Edit PDFs, I cover DEVONthink's features for basic, high-level editing; in Annotate PDFs, I explain how to add notes, comments, links, and shapes to PDF documents; and in Add Imprints, I tell you about an additional, specialized type of annotation.

Choose PDF Display Options

Most of the commands dealing with the ways in which PDFs are displayed appear on the easy-to-miss View > PDF Display submenu. You have the following options:

- **Layout:** In the first group of commands, choose Single Page (the default) to display the PDF in conventional "scroll" orientation, one page above the next. Or, for a more book-like view, choose Two Pages, which shows you pairs of pages side by side. (To make the view even more book-like, also choose Book Mode, in the second group of commands, which ensures that odd-numbered pages always appear on the right and even-numbered pages on the left, as in a physical book.)
- **Page presentation:** In the second group of commands, choose Continuous Scroll (the default) to view pages in immediate succes-

sion, as in a word processor—depending on your zoom level and how far you scroll, the window may show portions of two or more pages. (Optionally choose Page Breaks to show more visible empty space between the pages.) Uncheck Continuous Scroll to view only one page in the window at a time, regardless of the window size.

- **Crop box or media box:** The third group of commands specifies which portion of the page DEVONthink displays. (For many documents, this setting has no effect, but if it seems as though DEVONthink is showing too much or too little of a PDF, try the other command.)

Move Around in a PDF

To move from one point to another in a PDF, you can use the scroll bar; you can also use the Content inspector to view the table of contents (Tools > Inspectors > Table of Contents, Control-4) or thumbnails (Tools > Inspectors > Thumbnails, Control-5), and click an item in one of those lists to jump to that spot in the document. However, you have a few other options, too:

- **Next/previous page:** To move ahead by one page (or two, if you're in Two Pages mode via View > PDF Display > Two Pages), click the Next Page icon on the navigation bar. To move back by one page (or spread), click the Previous Page icon. The PgUp and PgDn keys also work fine.

Note: If you don't see next/previous page buttons on the navigation bar, make sure the editing bar isn't showing—click the Hide Editing Bar icon to hide it.

- **Forward/back:** This is subtly (but importantly) different from next/previous. Because PDFs may contain links to other pages (or you may skip around by clicking thumbnails or table-of-contents entries), you may want to return to *the last page you viewed,* even if it's not the previous page in the document. To do this, click the Go Back < icon on the navigation bar (⌘-[), which works the same way as a Back button in a web browser. To move forward after going back, click the Go Forward > icon on the navigation bar (⌘-]).

- **Go to page:** To go to a specific page in the PDF, choose Go > To Page, type the page number, and click OK. You can also click the page count on the navigation bar to display a Go to Page dialog.

Tip: In PDFs (as in any document in DEVONthink), you can use the Edit > Find > Find command (⌘-F) to search for text within the current document and jump directly to it.

Tip: You can select text in a PDF in the usual way—just click and drag. But you can also select a *vertical* column of text (such as a column in a multi-column document, or a sidebar). To do so, hold down the Option key while clicking and dragging

Edit PDFs

Although DEVONthink doesn't offer the extensive PDF editing capabilities found in apps such as Nitro PDF Pro and Acrobat Pro, it does include tools that let you insert, delete, rotate, and rearrange pages, or split a PDF into multiple documents.

While viewing a PDF in the view/edit pane or its own window, you can do the following:

- **Insert a blank page:** Choose Tools > PDF > Insert Blank Page, right-click/Control-click the document and choose Insert Blank Page from the contextual menu, or click the Insert Blank Page icon on the editing bar. A blank page is inserted *before* the currently selected page.
- **Delete a page:** Choose Tools > PDF > Delete Selected Page, right-click/Control-click the document and choose Delete Selected Page from the contextual menu, or click the Delete Selected Pages icon on the editing bar.
- **Rotate a page:** Choose Tools > Rotate & Flip > Rotate Left, Rotate Right, or Rotate 180 Degrees; right-click/Control-click the document and choose Rotate Left, Rotate Right, or Rotate 180 Degrees

from the contextual menu; or click the Rotate Left icon, Rotate Right icon, or Rotate 180 Degrees icon on the editing bar.

- **Rearrange pages:** On the Thumbnails tab of the Content inspector (Tools > Inspectors > Thumbnails, Control-5), drag a page thumbnail up or down to move it in the document.
- **Reverse all the pages in the document:** Choose Tools > PDF > Reverse Page Order, right-click/Control-click the document and choose Reverse Page Order from the contextual menu, or click the Reverse Page Order icon on the editing bar.
- **Split a PDF into chapters:** For PDFs that have a table of contents and chapter headings (including Take Control books!), you can choose Tools > Split PDF > into Chapters to create individual documents from each chapter.
- **Split a PDF into pages:** To split any multipage PDF into a series of one-page files, choose Tools > Split PDF > into Pages.

Annotate PDFs

DEVONthink has the capability to *annotate* PDFs—that is, to add comments or notes, highlight interesting passages, or even draw shapes on the pages, all without changing any of the underlying text or graphics. Annotations can be useful when marking corrections on page proofs, discussing a report or paper with your colleagues, or jotting reminders as you read an ebook.

To annotate a PDF, you can use the commands on the Tools > Annotate submenu or display the editing bar (by clicking the Show Editing Bar icon) and use the icons that appear there. **Figure 78** shows a PDF with a variety of annotations.

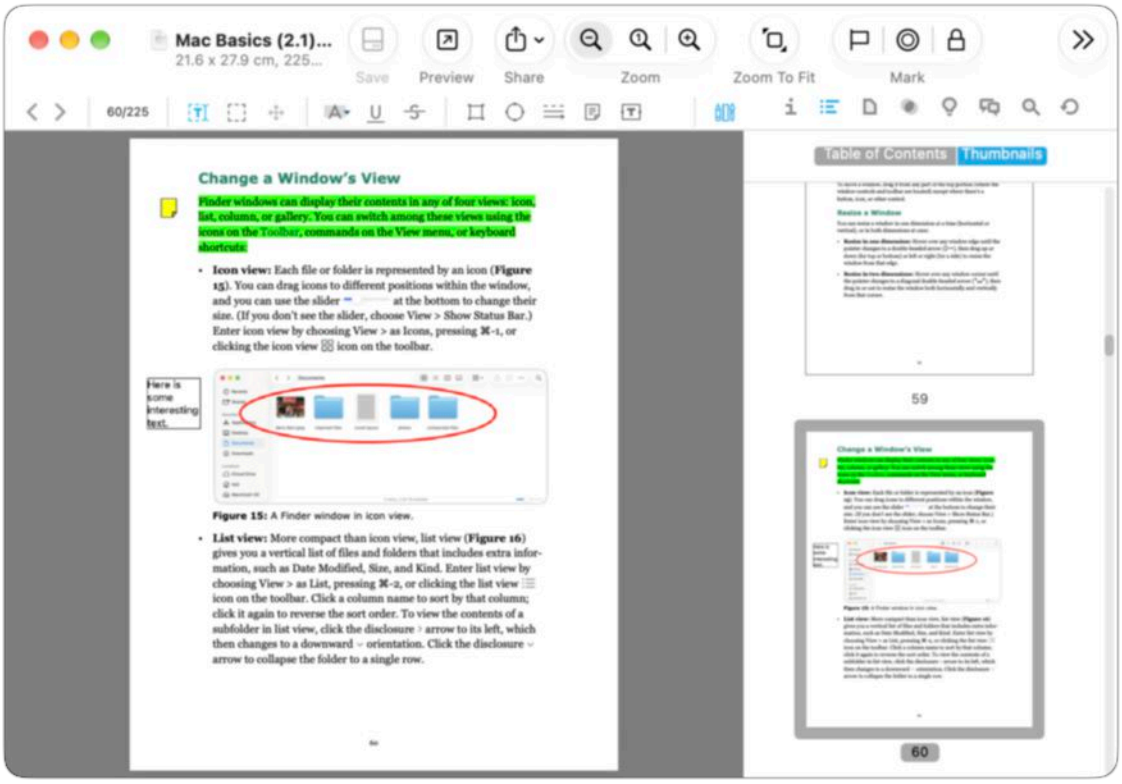

Figure 78: This PDF page has oval, text, and note annotations, as well as green highlighting.

You can annotate a PDF in any of the following ways:

- **Add a shape:** To call attention to a portion of the document, click the Oval tool, the Rectangle tool, or the Line/Arrow tool on the editing bar. Then click and drag to draw the selected shape. When you do this, an Annotations panel (**Figure 79**) appears, with controls to let you select the color, thickness, and other properties of the shape. (The range of options available in the Annotations panel varies depending on which type of annotation you're entering or editing.)

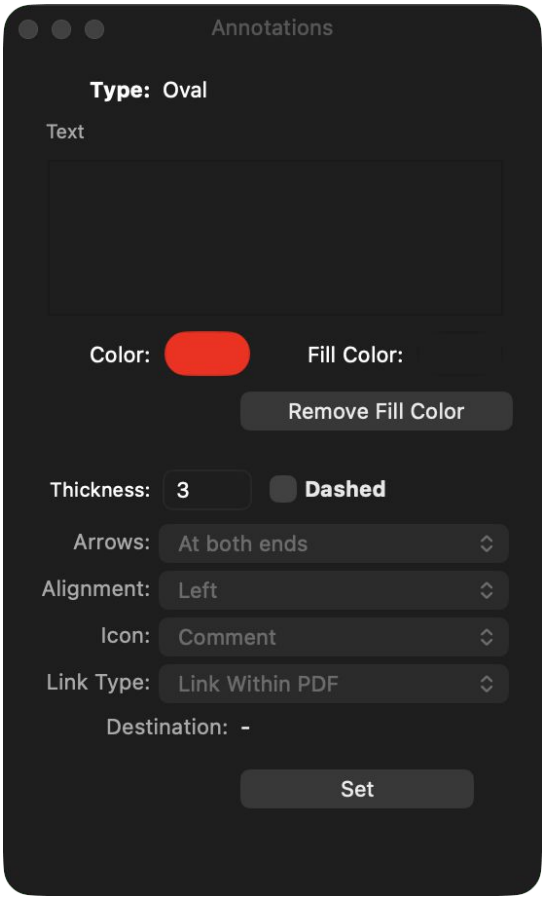

Figure 79: Adjust the characteristics of an annotation here. This is how the Annotations panel appears when you add an oval shape.

- **Add a note:** A note is a comment that appears with a small reference icon at the location of your choice on the page; double-click this icon to display the note's contents in the Annotations panel. (If the document is open in its own window, clicking the icon displays the note's contents in an overlaid "sticky note.")

  To add a note, click the Note tool on the editing bar and then click where you want the reference icon to go. When the Annotations panel appears, type your note in the Text field at the top and then click the close button in the upper-left corner of the panel.

- **Add text:** Unlike notes, which normally appear as unobtrusive icons in your document, text annotations appear on top of the text (much like a sticky note). To add text, click the Text Annotation tool on the editing bar, and then drag out a box to hold your annotation. When the Annotations panel appears, type in the Text field at the top and then click the close button in the upper-left corner of the panel.

- **Add a link:** You can add a link anywhere in the document, either to another location in the document or to an external URL. To do this, click the Link tool on the editing bar and then drag out a box where you want the link to appear. When the Annotations panel opens, do one of the following:

  - To link to a URL, choose URL (the default) from the Link Type pop-up menu, and then type or paste a URL into the URL field at the bottom.

  - To link to another page in the document, choose Link Within PDF from the Link Type pop-up menu. Then move to the location in the PDF to which you want the link to point (by scrolling or clicking a thumbnail, for example) and click Set.

  Click the close button in the corner of the panel when you're done. Your link will be clickable only when the Text tool or the Select tool is selected. (By the way, the purpose of the Select tool is to let you select annotations—to edit, move, or delete them—not to select contents of the PDF itself.)

Note: Links you create yourself in DEVONthink are normally invisible; they appear with the gray crosshatch only when the Select tool or one of the annotation tools is selected. Regardless of visibility, they're clickable only when Text or Select is selected—not when Move is selected. The pointer changes to this shape when over a link.

- **Apply underline or strikethrough:** Select any text in a PDF and click the Underline or Strike Through icon on the editing bar, or choose Format > Style > Underline (⌘-U) to underline it or Format > Style > Strike Through (⌘-Control-S) to cross it out. These commands are also found on the Tools > Annotate submenu.

Note: Some PDF editing apps, such as Nitro PDF Pro, offer a "squiggle" underline style. DEVONthink displays these properly, though it doesn't let you add squiggly underlines.

- **Highlight text:** To apply a highlighter effect, select a range of text and click the Highlight icon on the editing bar, or choose For-

mat > Highlight (⌘-Shift-L). To adjust the highlight color, click and hold the icon and choose a color from the pop-up menu, or choose a color from the Format > Highlight Color submenu. To remove a highlight, select the highlighted text and choose the Highlight command again. These commands are also found on the Tools > Annotate submenu.

You can also add a note to highlighted text: Select the highlighted text, right-click (or Control-click), and choose Add Note from the contextual menu.

After making any annotations, be sure to save the document.

To remove an annotation, make sure an annotation tool is selected; then select the annotation and press Delete. To edit an annotation, double-click it, again with any of the annotation tools active. You can change the font and color of the selected annotation using the standard Fonts panel (⌘-T); move it using the arrow keys or by clicking and dragging. You can also view all the annotations for a PDF on the Annotations tab of the Document inspector.

Add or Edit a Table of Contents

PDF documents can contain *bookmarks*, which are invisible markers used as the destination for internal links. Take Control books, including this one, use bookmarks extensively: every time you see a non-underlined blue link in the PDF version of one of our books, you can click it to jump to another page.

Some PDFs build on the concept of bookmarks to create a *table of contents*: a sequential list of selected bookmarks to help you navigate the document. In a PDF, a proper table of contents isn't merely a section at the beginning of the document; it's also metadata that PDF readers can display separately—often in a sidebar—regardless of what page you're viewing. In DEVONthink, you can see a PDF's table of contents by going to Tools > Inspectors > Table of Contents (Control-4).

New in DEVONthink 4 is the capability to add or edit bookmarks in PDFs and create your own table of contents.

To add a bookmark, navigate to a page in a PDF and choose Data > Add To > Table of Contents. You can instead right-click/Control-click in the document and choose Add To > Table of Contents from the contextual menu. If any text is selected when you use this command, its first line becomes the bookmark's name; otherwise, the bookmark's name is the page number.

> **Note:** New bookmarks become entries in the table of contents, and DEVONthink creates a new table of contents if none exists.

You can then edit your table of contents by choosing Tools > Inspectors > Table of Contents. There, you can:

- Rename a bookmark by double-clicking it and typing a new name.
- Delete a bookmark by selecting it and pressing Delete.
- Move a bookmark to another spot in the list by dragging it.

Add Imprints

Imprints are present only in the Pro and Server versions of DEVONthink. You can think of an imprint as an automated version of a text annotation. An imprint can add text (in your choice of font, size, color, and style; and with an optional shape border and fill) to a PDF or graphics file. But unlike text annotations, imprints can include placeholder text, numbering, and precise positioning; and you can apply them to all pages or only particular pages of a document. Imprints are thus good for watermarks, stamps, page numbering, and other material that you might want to add to images and PDFs in an automated way.

To create an imprint, start by going to Settings > Imprinter. Click the plus [+] button, then click the name ("New Imprinter") under the Configurations heading, type your own name for the imprint, and

press Return. The window should then look something like **Figure 80**.

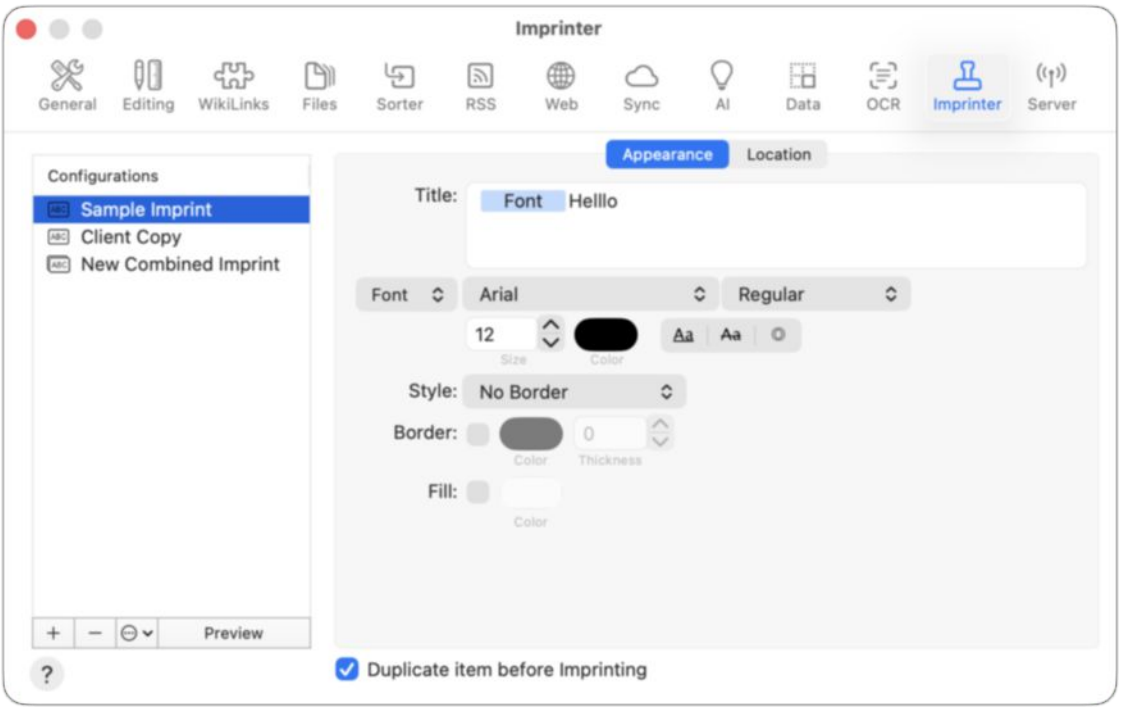

Figure 80: Set up the contents and appearance of imprints here.

In the Title field, type the text you want to appear in the imprint. A Font token appears in that field by default; this is a placeholder telling DEVONthink you want to specify the font information for the imprint, which you almost certainly do. If you delete that token, DEVONthink puts it back automatically. Basically: just ignore it.

Speaking of placeholders, you can use as many as you like in an imprint. Right-click (or Control-click in the Title field) and choose a placeholder from the Insert Placeholder submenu of the contextual menu. Among the many options (see Using Placeholders for more information) are File Name, Counter, Page Number, various date and time options, Bates Number, and custom metadata.

Use the controls below the Title field to specify the font, size, style, and color you want for your imprint. Use the Style pop-up menu to enclose your imprint in a shape; the choices are rectangle, rounded rectangle, oval, left-pointing arrow, and right-pointing arrow. If you choose one of these borders, you can then use the Border and/or Fill controls to

specify whether the shape should have a border, fill, or both—and what the border/fill attributes should be.

To specify where on each page the imprint should go, click the Location tab (**Figure 81**). Click a square in the Position selector to anchor the imprint to that relative spot on the page; then use the Offset fields to specify the number of pixels by which it should be offset from that location in each axis. To rotate the imprint, enter a number of degrees in the Rotation field. Finally, select an Occurrence radio button to specify which page(s) of a document the imprint should apply to.

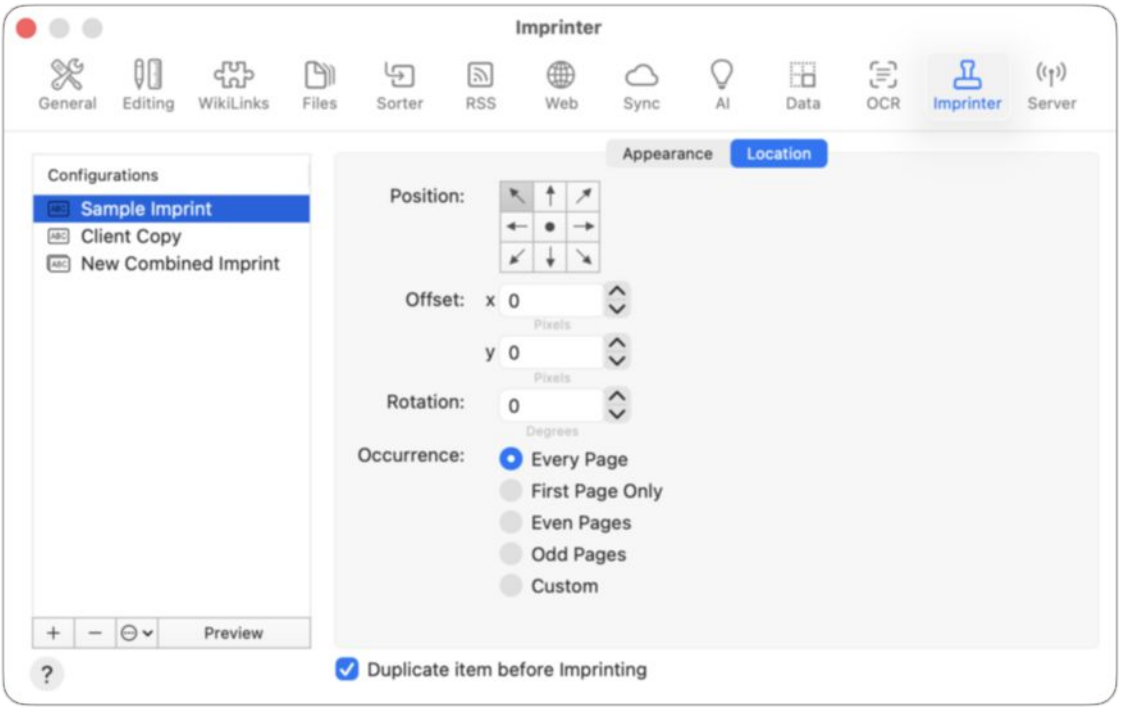

Figure 81: Set the location, rotation, and occurrence of imprints here.

Three other imprint options are worth mentioning:

- **Duplicate item before imprinting:** Because imprints permanently change the document and DEVONthink offers no tools for removing them, you might want to hedge your bets by checking this box, which instructs DEVONthink to make a copy of each item you imprint, and then add the imprint to the copy.
- **Preview:** Click the Preview button at the bottom of the Configurations list to see what your imprint will look like on an example document page.

- **Combined Configurations:** What if you want to put multiple imprints on the same document, each with different characteristics? You could manually apply multiple imprints, but an easier way is to create each imprint individually, then create a combined imprint that applies them all at once. To do this, click the actions icon at the bottom of the Configurations list and choose New Combined from the pop-up menu. Select an imprint from the Configurations list on the right and click the left < arrow button to add it to the combined configuration. Repeat as necessary to add more imprints to the combination.

Once you've configured an imprint, you can apply it to any image or PDF by selecting the document and then choosing Tools > Imprinter > *Imprint Name*. DEVONthink adds the imprint, converting placeholders into real text as appropriate.

Convert Document Formats

Earlier I mentioned that scanned PDF documents can be converted to searchable formats (PDF, RTF, Word, and web archive) by choosing commands from the Data > OCR submenu. DEVONthink can perform other conversions too—find the commands on the Data > Convert submenu.

The additional options and the document types they can convert are:

- **to Plain Text:** Any text-based format, such as rich text, HTML, Markdown, PDF, Pages, Word, web archives, formatted notes, bookmarks, email messages, and EPUB
- **to Rich Text:** Plain text and most other text-based formats (such as sheets and PDF, but not Pages), plus graphics
- **to Formatted Note:** Plain text, rich text, and most of the text-based formats (but not PDF or Pages)
- **to Markdown:** Most text-based formats, such as rich text, HTML, PDF, Pages, Word, web archives, and email messages—but not EPUB

- **to HTML:** Plain text, rich text, PDF, and most of the text-based formats (but not Pages)
- **to Web Archive:** Any text-based format, such as rich text, HTML, Markdown, PDF, Pages, Word, email messages, and EPUB
- **to PDF (Paginated):** Any document type that DEVONthink can edit
- **to PDF (One Page):** Any document type that DEVONthink can edit
- **to PDF without Annotations:** PDF only
- **to Flattened PDF/A (with Annotations burnt in):** PDF only

> **Note:** Flattened PDF/A (technically, PDF/A-2u, ISO 19005-2) is an archival version of PDF that omits external elements, encryption, and other PDF attributes that could impair the document's long-term readability.

- **Duplicates to Replicants:** Items that have duplicates in your DEVONthink database

Edit Documents in External Apps

For documents that DEVONthink can't edit itself—or in cases where you need special features found in a different editor—you can open any document in another app of your choice.

To open a document in an external app, select the document and choose Data > Open with > *Name of App*. (The "Open with" submenu also appears on the Actions pop-up menu on the toolbar and on the Control-click contextual menu.) The apps listed there are the ones that advertise themselves as being able to open the file format in question. For example, when you select a Word document, the Open With submenu shows not only Microsoft Word (as the default choice, at the top), but also TextEdit and other apps you may have that can read Word files, such as Pages and Nisus Writer Pro.

If you prefer not to use DEVONthink's document editing tools, you can also choose to have all files open in their default app when double-clicked. The behavior here depends on what is set in Settings > General Interface > "Double-click opens documents externally":

- If that box is *checked*, then double-clicking any document—even one DEVONthink can edit intrinsically—opens it in the default app for that document type. If you want to open it in DEVONthink instead, as a read-only preview, instead select the document and choose Data > Open (⌘-O).

Note: You can also double-click an attachment within another document (typically a rich text document or an email message) to open it in the appropriate external app.

- If that box is *unchecked*, then double-clicking any document opens it within DEVONthink. If it's a file format DEVONthink can edit, then you get an editing window; if not, you get a preview window. To force the document to open in the default external app, select it and press ⌘-Shift-O.

Use Generative AI Features

Earlier, in Generative AI, I described how DEVONthink 4 Pro and Server offer a number of optional capabilities that rely on large language models. Although I mention a number of these features throughout the book, this section offers more detail on how to set up DEVONthink to use generative AI and use a few of the core features.

Configure AI Settings

Before you can do anything with LLMs in DEVONthink, you must tell it which engine(s) and model(s) to use, which in turn requires you to perform some setup outside DEVONthink.

First, to use an online engine, you must go to the provider's website, create a developer account, obtain an API key, and buy credits. (Online engines include OpenAI's ChatGPT, Anthropic's Claude, and Google's

Gemini, among others. OpenRouter is also supported, and it, in turn, can access numerous engines by multiple providers.)

> **Note:** Because the list of supported providers and models, and their individual processes and requirements, constantly changes, I can't provide links or step-by-step instructions here. If that vagueness is frustrating, it may be a sign that DEVONthink's generative AI features are not for you. As I said earlier, they require some technical chops.

As an alternative, you can download, install, and run a local engine on your Mac, such as GPT4All, LM Studio, or Ollama. Each of these offers multiple models with constantly changing options, as with everything in AI. The good things about running local models are that they're often free and they preserve your privacy by keeping all data on your Mac. But the bad things are that they're slow, resource-intensive, and more likely to hallucinate because they have less data to work with.

> **Note:** To use the local GPT4All engine, choose OpenAI (Compatible) as the provider.

Once you have an API key in hand or a local model up and running, you can configure DEVONthink's AI settings in Settings > AI, starting on the Chat tab:

- Choose a default Provider and Model from the pop-up menus provided. Assuming your Mac is running Tahoe or later and Apple Intelligence is turned on, you can choose Apple Intelligence without the need for any further settings—but note that, at present, its capabilities are limited to basic tasks. Or, you can use any of numerous third-party providers and models. For example, if you choose ChatGPT as the provider, you can choose among several models, such as GPT 5.6 (which comes in Luna, Terra, and Sol varieties), and GPT 5.5 (Pro).

  Figuring out which provider and model to use is a complex topic, and DEVONthink's documentation provides some high-level guidance. Icons next to a model's name tell you a bit more about it: a bulb (💡) indicates that it supports reasoning; an eye (👁) means support for vision (text recognition in graphics); a gear (⚙) indi-

cates tooling support (being able to use some of DEVONthink's commands); a magnifying glass (🔍) means models that can perform their own web searches; and a dollar sign (**$**) indicates the cost of the model, with bolder symbols meaning higher cost.

Note: Regardless of what defaults you set here, you can change the provider and model on the fly for individual queries.

- Fill in the API key for the provider you chose; or, for engines running on your Mac, fill in the local URL. (If you have keys for more than one provider, you can fill them all in, and DEVONthink remembers those keys as you switch among providers.)
- From the Usage pop-up menu, choose Best, Cheapest, or Auto to set your overall priority for speed versus cost.

Note: The remaining settings are optional, and those that aren't self-explanatory are covered in DEVONthink's help.

Although that's all the setup needed for most generative AI activities in DEVONthink, you can customize additional settings on these tabs:

- **Library:** This tab contains settings for roles (which describe the general parameters of LLM interactions), prompts (pre-written instructions for performing specific functions), and skills (automations used by MCP tools; see the next item).
- **MCP:** Model Context Protocol, or MCP, is a standardized mechanism that AI apps can use to communicate with data sources. Starting with version 4.3, DEVONthink running on macOS Sequoia or later has a built-in MCP server, which means that—if you set it up and turn it on—other AI apps you may have installed on your Mac, such as Claude Desktop, can get data from DEVONthink and perform operations in DEVONthink.

If you don't already use other AI apps on your Mac, there's nothing to see here; move along. If you do, you can learn more about DEVONthink's MCP support in:

- *Tutorials*. In DEVONthink, go to Help > Tutorials and read the tutorials Using AI Skills and Understanding the MCP Server.
- *The DEVONthink manual*. Download the latest version and look at the MCP Server topic in the appendix, which has detailed information.

- **Search:** If you're using a generative AI model, you can use the controls on this tab to specify where the model may search; and, for web and Wikipedia searches, which engine to use. If nothing is selected, only the selected item(s) can be searched.
- **Summarization:** Configure the way summaries of documents are provided.
- **Image Generation:** Choose a model (different from the text-based models) for creating images, enter the appropriate API key, and configure default aspect ratio and quality.
- **Transcription:** For transcribing text from images, audio files, and video files, determine how that text is presented (choose Searchable Text, Annotation, or Comment from the Destination pop-up menu), choose a default transcription language, and select recognition engines for images and for audio and video files. (Apple Vision and Apple Speech are part of Apple Intelligence; you can also use GPT.)

Note: Additional AI-related settings are found in Settings > Files > Tags and Settings > Files > Import.

Chat with AI

Having set up at least one model, you can now chat with an LLM in either of these ways:

- Open a chat window (sometimes called the Chat Assistant) by choosing Tools > Chat (⌘-Control-A). Initially, the window appears

as a popover, but you can drag it by the "point" to detach it and use it as a conventional floating window.

- Go to the Chat inspector by choosing Tools > Inspectors > Chat.

In either spot, type your query in the Ask field; despite the small field size, you can enter text as long as you need it to be. Although these entries can be freeform, generic queries (such as `Write me a haiku about mice`), you can also use the LLM to provide more information on whatever document(s) are currently selected (such as `Summarize this document`, `Translate this document into French`, or `Tell me what these documents have in common`). If no documents are selected, the LLM may use the currently selected group, feed, smart group, rule, or database for context.

With or without documents selected, you can ask the LLM to draft an email for you (such as Draft an email summarizing this document). Depending on which model you choose, it may provide the proposed text of the email in the chat window or open a new message in your default email app containing the drafted text.

Tip: To use a different model or engine, click the icon to the left of the Ask field and choose the one you want from the pop-up menu. (The icon's appearance indicates the engine currently in use.)

Note: To use an LLM for help with DEVONthink, open the Help window by choosing Help > DEVONthink Help. (If the sidebar is not already open, click the sidebar icon to display it.). Then type in your query (such as `How can I pick the most efficient LLM`). Queries you type in this window use the contents of the DEVONthink documentation as a source of information.

Keeping in mind that, while DEVONthink also uses the term "chat" in the broader sense of "using generative AI," you can also do the following, even though it doesn't involve chatting as such:

- **Summarize text:** To summarize selected text or a single selected document using your default generative AI tool, choose Edit > Summarize via Chat. The popover that appears enables you to

choose a variety of summary approaches, including bullet points and table.

- **Transform text:** To rewrite the selected text using a different tone, choose Edit > Transformations > Transform Text via Chat. You can then switch among different styles. (This creates an effect similar to Apple's Writing Tools.)
- **Summarize documents:** To summarize one or more selected documents, choose Tools > Summarize Documents via Chat > *Format*, where the format can be Markdown, Rich Text, Annotation, or Comment.
- **Apply tags:** To generate tags that might apply to the selected document(s) and apply them automatically, choose Data > Tags > Add Chat Suggestions to Documents.
- **Apply labels:** To have the AI engine set the label for the selected document(s) to something plausible, choose Data > Label > Chat Suggestion.
- **Apply a rating:** This one seems pretty out there to me, but DEVONthink can guess at a star rating for the selected document(s) using Data > Rating > Chat Suggestion.

Note: To exclude a document or group from being used with generative AI features, go to the Generic inspector (Tools > Inspectors > Generic) and select the Chat checkbox in the "Exclude" section (see Work with Metadata).

Use AI Searching

As I covered earlier in Perform an AI Search, DEVONthink can also use AI to construct complex search criteria without having to learn any special syntax.

Use AI Transcriptions

DEVONthink can use either Apple's built-in frameworks or cloud-based AI engines to transcribe text from graphics, PDFs, and audio or

video files in various formats, as well as to recognize barcodes. I described these features earlier, in Learn About Text in Graphics, PDFs, Audio, and Video.

Use AI Image Generation

Most people are likely to focused on text-related uses for AI in DEVONthink. However, you can also use generative AI to create images from prompts.

One way to do this is to choose Data > New > Generate Image (**Figure 82**). Enter a prompt, optionally tweak the settings to your liking, and click Generate.

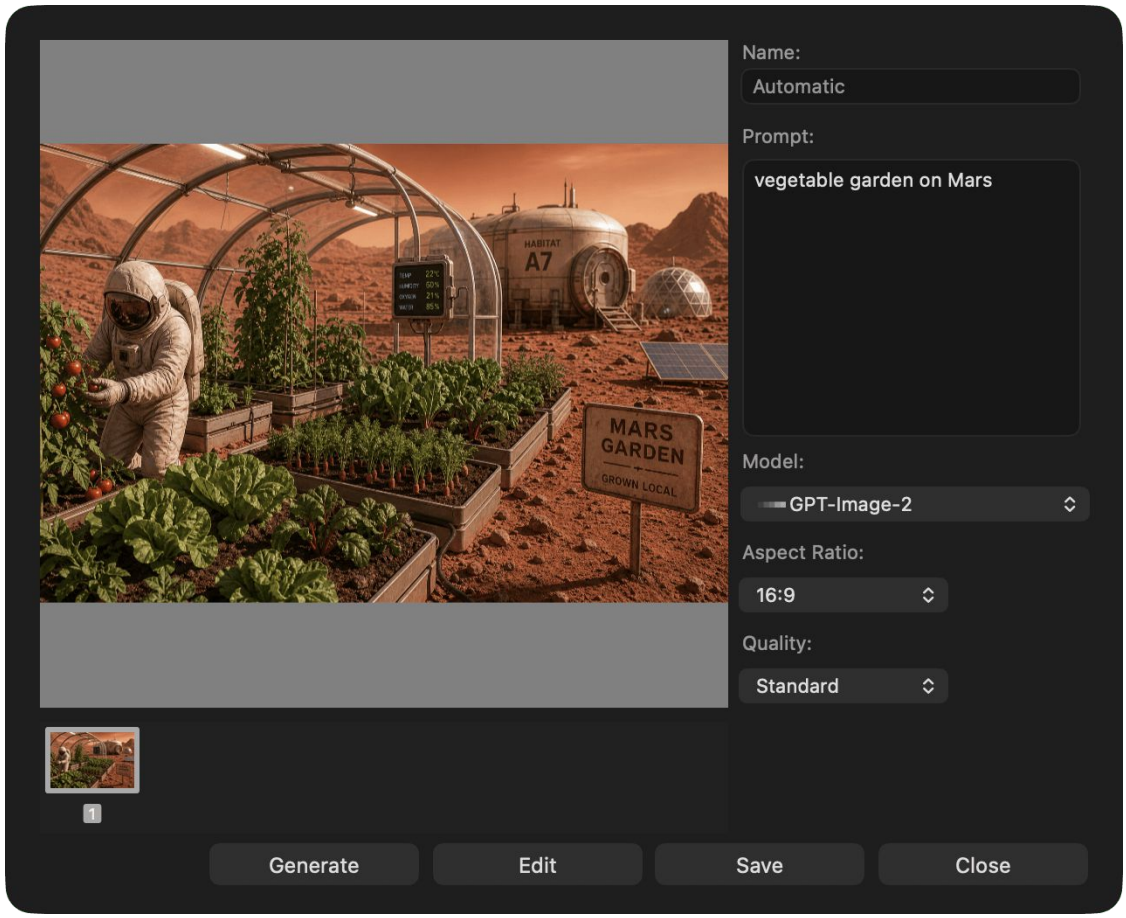

Figure 82: An AI image generator (in this case, GPT-Image-2) responds to my prompt `vegetable garden on Mars`.

In addition, certain models enable an Edit button with which you can ask for modifications to a generated image. (You can also drag in an

image of your own and click Edit to use the model to make modifications.)

You can also find a couple of image-related templates on the Data > New from Template > AI submenu.

Note: To configure the necessary API keys for various image-generation engines, go to Settings > AI > Image Generation.

Use Other AI Features

DEVONthink uses generative AI in a number of other spots, too, some of which are covered elsewhere in this book. For example:

- The built-in script editor (see Writing Your Own Scripts) uses AI to generate AppleScripts for DEVONthink.
- Smart rules (see Work with Smart Rules) and batch processing (see Batch Processing) can use three AI actions: Chat - Query, Chat - Continue if, and Recognize.
- Some of the provided AppleScripts (see the Chat submenu of the Scripts menu) use generative AI.

Automate DEVONthink

DEVONthink offers plenty of power and utility when used manually—dragging stuff in; finding, organizing, and editing things; and sharing or exporting things. But you can also put DEVONthink to work for you by configuring it to automate repetitive or time-consuming tasks.

In this chapter, I cover four main ways to automate DEVONthink: using smart rules, reminders, AppleScript, and smart templates.

Work with Smart Rules

As you'll recall (refer back to Use Smart Groups), a smart group is basically a saved search that lists items matching one or more criteria you specify. A *smart rule* builds on that concept—instead of merely *listing* items that meet your criteria, it *does something* when items meet your criteria. In this way, it's much like the rules (or filters) your email app offers—for example, when a message comes in with a certain sender, a rule might file it into a particular mailbox; or if a message has a specific subject, your email app might send an autoreply.

But DEVONthink's smart rules can do fancier things—for example:

- When DEVONthink opens, convert any web archives in your inbox that mention your name into PDFs
- Every time you move a document with a certain label, change its modification date
- Once a week, move any unread items in your global Inbox to the Trash
- Perform OCR on every PDF document as it's imported (not necessary for incoming scans; see Configure OCR Settings)
- Replicate items with a certain tag to a predefined group whenever you open them

Note: DEVONthink includes a selection of smart rules by default. If you delete any of them, you can restore them by clicking the New pop-up menu at the bottom of the sidebar and choosing Add Default Smart Rules.

Set Up a Smart Rule

What you may notice about the example smart rules above is that they all feature search criteria (which can include a specific location, or not, and zero or more attributes), an action (what DEVONthink does with them), and a *trigger* (what event happens that causes the action to occur, such as opening the app or moving a document). DEVONthink offers a long list of actions to choose from, and a smart rule can also perform a sequence of actions. Similarly, many different events can trigger a smart rule, or you can trigger the rule manually in multiple ways.

To create a smart rule, follow these steps:

1. Either choose New Smart Rule from the New pop-up menu at the bottom of the sidebar or right-click (or Control-click) an item in the sidebar and choose New Smart Rule from the contextual menu. The Smart Rule dialog (**Figure 83**) appears.

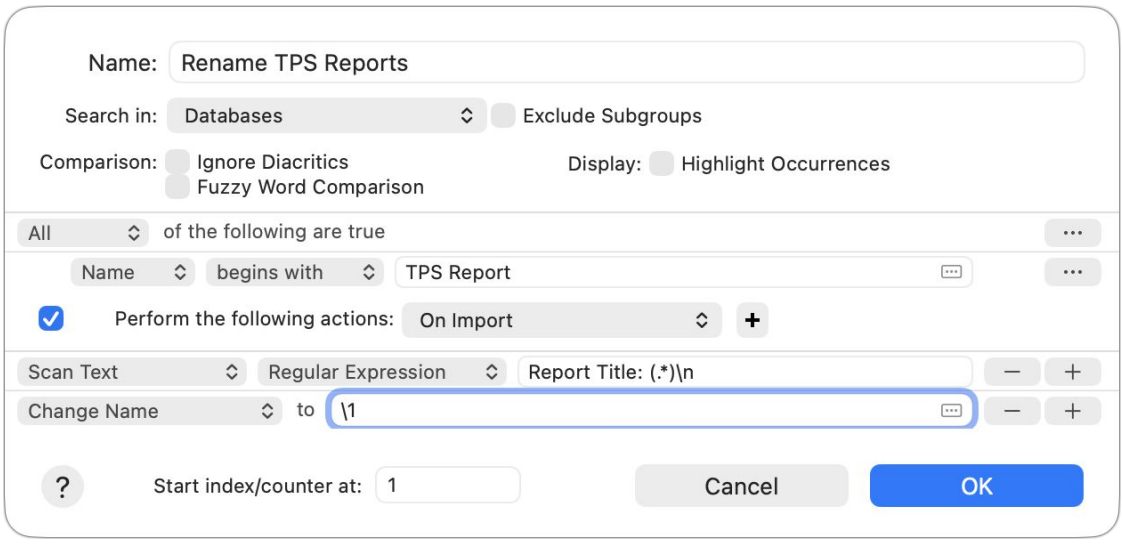

Figure 83: Create a smart rule using this dialog.

2. Type in a name for your smart rule.

3. Specify the scope of the rule: from the “Search in” pop-up menu, choose an inbox, database, group, or tag; or choose Databases to search everywhere.

Note: If a location is selected in the sidebar when you create your smart rule (or if you use the contextual menu to create it), the “Search in” pop-up menu is initially set to that location.

4. Fill in the options and search criteria just as you would when creating a smart group (refer back to Use Smart Groups).

   So far, what you’ve done is identical to what you would do when creating a smart group. But now, instead of displaying a list of matches, you specify what DEVONthink should do with matches, and when.

5. From the “Perform the following actions” pop-up menu, choose a trigger—that is to say, an event that must occur in order to make your rule run. There are dozens of options, including On Startup, Hourly, On Creation, On Open, On Replicating, On Tagging, and On Moving into Database. Most of these should be self-explanatory, but consult the DEVONthink documentation for details if need be.

   If you want your smart rule to run only when you ask it to—for example, by choosing a menu command or dropping a document onto your smart rule—choose On Demand (the default choice).

   A given smart rule can be triggered by more than one action. For example, you might have a rule that operates when a document is opened as well as when tags are added. To add another trigger, click the plus ⊕ button next to the “Perform the following actions” pop-up menu.

Tip: To disable all event triggers, deselect the checkbox next to “Perform the following actions.” This can be useful if you want to temporarily disable a smart rule.

6. From the unlabeled pop-up menu in the bottom portion of the dialog, choose an action that will occur when the rule is triggered

and the conditions are met. Again, there are dozens of options, such as Display Alert, Add to Reading List, Change Name, Add Tags, Move, Classify, and OCR. Actions that use generative AI, if available, include Chat - Query and Chat - Continue if. Again, see the documentation for details about any actions that seem unclear.

Some actions require additional information. For example, if you specify Display Alert, you must fill in the text of the alert; if you specify Move, you must fill in a destination.

Note: One of the available actions is Apply Script, to run an AppleScript or JavaScript. Choose External to use a script already stored in the designated Smart Rules folder (or one you save there), or choose Embedded and click Edit Script to enter a script directly in DEVONthink. See Included Scripts, ahead, for more information. DEVONtechnologies strongly recommends that if you include an Execute Script action, you make it the last action in the rule.

7. To make the rule perform an additional action, click the plus button and fill in the details; repeat as desired.

8. Click OK.

DEVONthink saves the smart rule, which thereafter appears in the Smart Rules section of the Navigate sidebar. (Smart rules are always considered global items, even when they apply only within specific databases.)

From now on, whenever the trigger(s) you chose occur(s), DEVONthink runs the smart rule—it looks in the location you specified for items that match the criteria you set, and if it finds any, it performs the action(s) you requested.

To edit a smart rule later, double-click it in the sidebar; to keep the original and edit a copy, first right-click (or Control-click) the rule and choose Duplicate from the contextual menu. (You might also try this with the smart rules DEVONthink includes by default—such as Filter Duplicates and Automatic Locking—to see how they work.)

Tip: To turn an existing global smart *group* into a smart rule, hold down Option while right-clicking or Control-clicking and choose "Duplicate as smart rule" from the contextual menu.

Run Smart Rules Manually

If you chose On Demand as a trigger in step 5 above, you can run your rule manually in one of the following ways:

- Drag one or more items onto the smart rule icon in the sidebar.
- To apply a smart rule *only* to selected items (assuming they match the rule's conditions), select one or more items and choose Tools > Apply Rules > *Rule Name*.
- To perform a smart rule on *any* item in your database that might match it—regardless of what you may have chose when you created it—choose Tools > Perform Rules > *Rule Name*; read and consider the warning asking if that's really what you want to do, and click OK if you still want to run the rule.

Batch Processing

A batch process is sort of like a manual, ad hoc smart rule—but just the action part, not the matching part. For example, if you want to rename a set of documents, or change something about their meta-data, but just as a one-time task and not a recurring event, you can use a batch process to do so.

To perform a batch process, select one or more items and choose Tools > Batch Process > Batch Process (⌘-Control-B). In the dialog that appears, choose an action from the pop-up menu and fill in any required details. (The list of actions available for batch processing is a subset of the actions available for smart rules. Again, this includes Chat - Query and Chat - Continue if.) As with a smart rule, click the plus + button to enter more actions. Click OK to apply the actions you just specified to the selected items.

Use Text Searches in a Smart Rule

DEVONthink's smart rules (and batch processes) include Scan Name and Scan Text actions. These actions enable DEVONthink to search either the name of a document or its contents for a pattern, which can then be used in a subsequent action. The patterns you search for can include wildcards and regular expressions.

As an example of how you might use one of these actions, see **Figure 84**, below. In this smart rule, imported documents whose names begin with "TPS Report" are searched for a line that matches the pattern "Report Title: *something*" (followed by a return), using the regular expression `Report Title: (.*)\n`. The next action then uses that *something* (`\1`) to rename the document.

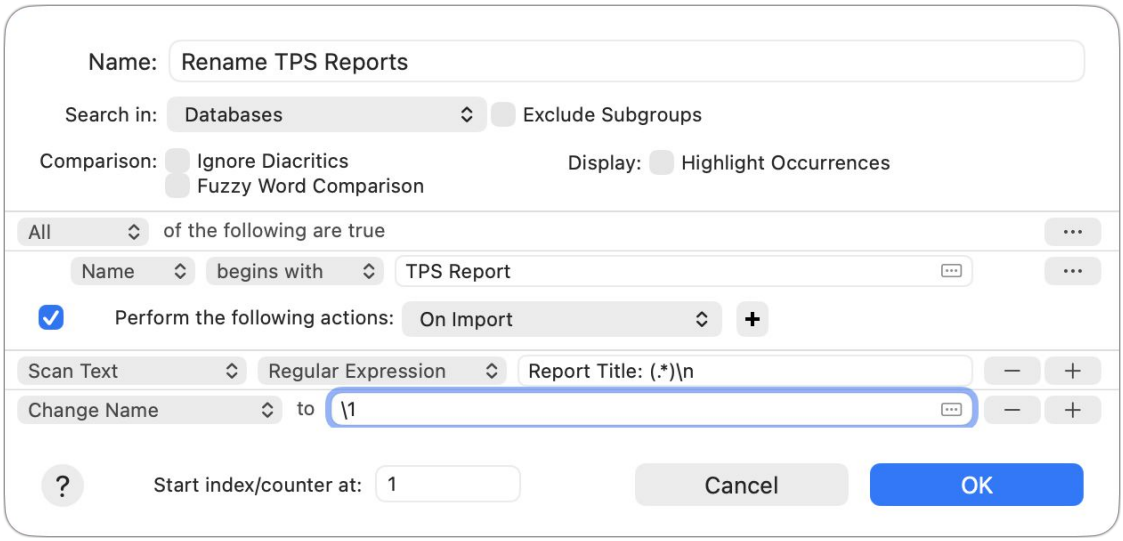

Figure 84: This smart rule looks for a text pattern within certain imported documents and uses it to rename those documents.

If you're using a String search (instead of a regular expression, as in this figure), the wildcard `*` (any string) can't appear alone; it requires a prefix and/or a suffix, such as `Date: *`. You can then reference that string in another action by typing `%Document String%` or by right-clicking or Control-clicking in another action's field and choosing `*` Document String from the Placeholder submenu of the contextual menu.

Note: Scan Text actions in smart rules and batch processes scan only the first eight pages of PDFs and the first 40k of text.

Use Reminders

If you've ever set an alarm in Apple's Calendar or Reminders apps to alert you when an event is about to occur, DEVONthink's reminders will look quite familiar. Any item can have a one-time or recurring reminder. For example, if you've imported a webpage but you want to remember to revisit it to check for changes on a certain date, or if you want to set alarms for deadlines relating to a project you're developing in DEVONthink, reminders can help you with those tasks.

I think of reminders as an automation feature partially because they make things happen at a fixed time or on a recurring schedule without manual intervention, and partly because one form a reminder alarm can take is running an AppleScript or JavaScript (which, as you'll see later in this chapter, can do just about anything).

To set a reminder:

1. Select any document or group.
2. Choose Tools > Inspectors > Annotations & Reminders (**Figure 85**).
3. From the Remind pop-up menu at the top, choose when the reminder should occur: Never (the default), Once (including the preset options of Today, Tomorrow, In Two Days, In One Week, and In Two Weeks), Hourly, Daily, Weekly, Monthly, or Yearly.
4. For anything other than Never, fill in the details of the day(s), date(s), and time(s) for the reminder, just as in the Calendar app.

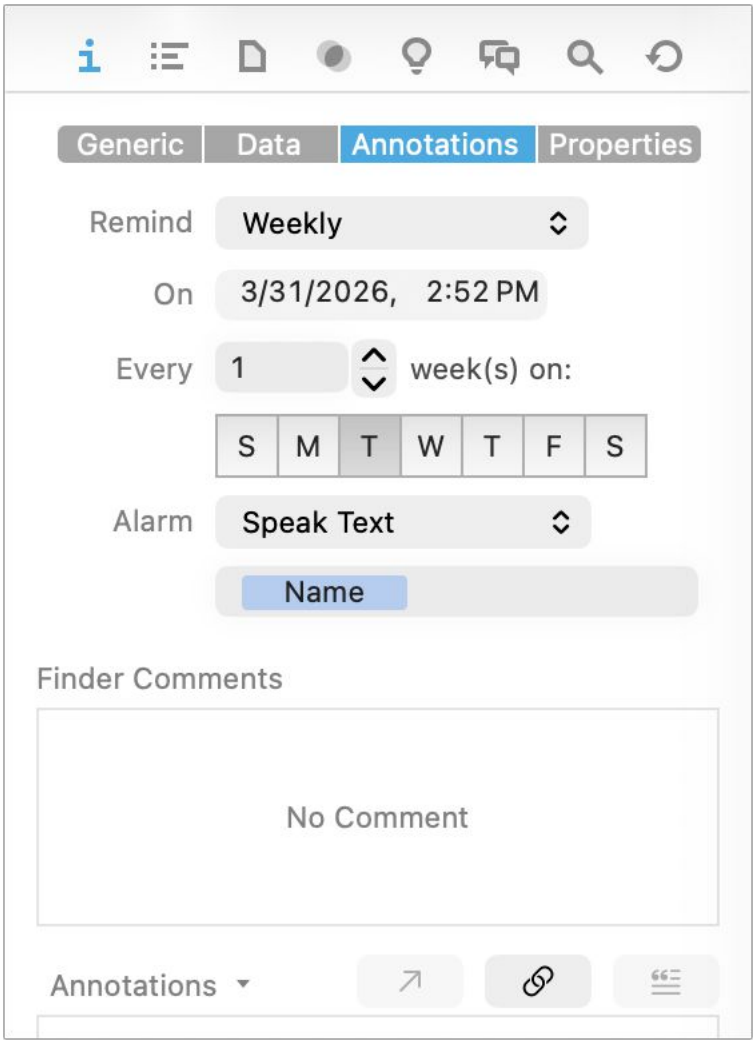

Figure 85: The Annotations & Reminders inspector as it appears with a weekly reminder set.

5. From the Alarm pop-up menu, choose the type of alert. In most cases, something visible (Display Notification or Display Alert) or audible (Speak Text or Play Sound) is probably what you want, but you can also send an email, open a document, or run an AppleScript. As with smart rules, the script can be either external (that is, one that's stored in the designated Reminders folder—see Included Scripts, ahead) or embedded (something you type or paste into DEVONthink). Be aware, however, that if you use an embedded script with a one-time reminder, the script will disappear from DEVONthink once the reminder occurs.

6. Make sure "Enable reminder alarms" is selected in Settings > General > General.

Note: Unlike alerts in Calendar and Reminders, DEVONthink's reminders can have only one alarm per item.

Note: You can disable all reminder alarms if need be by going to Settings > General and unchecking "Enable reminder alarms."

Alternatively, for a quick reminder (but with fewer options), you can select an item, right-click (or Control-click) it, and choose Tools > Annotate & Remind > *Time Period* from the contextual menu; choose Later to select a specific date and time. You can select the same document and return to Tools > Inspectors > Annotations & Reminders to set additional parameters.

Note: If DEVONthink is not already running one minute before an alarm is scheduled, it opens automatically.

Tip: You can now export all your DEVONthink reminders and import them into Apple's Reminders app: choose Script > Reminders > Export to Reminders. Note, however, that this does *not* keep reminders in sync between the two apps.

Use AppleScript or JavaScript with DEVONthink

Despite DEVONthink's incredibly long list of features, it may not do everything you want it to do. Fortunately, it also includes extensive support for AppleScript and JavaScript for Automation (JXA), which means you can add new capabilities to the app, automate complex sequences of tasks, and integrate DEVONthink in novel ways with other apps running on your Mac.

Many books have been written about AppleScript, and I couldn't begin to offer a proper guide to using it here. (I can, however, put in a quick plug for my book *Take Control of Automating Your Mac*!) Instead, what I provide here is simply a quick overview of DEVONthink's

AppleScript support, a few examples of included scripts, and pointers on where to learn more.

> **Note:** I don't cover JavaScript in this book, but if you already know JavaScript, you can use the syntax you're already familiar with to write scripts for DEVONthink. The built-in Script Editor also supports JavaScript, with or without AI assistance.

AppleScript is an English-like scripting language that was designed to be reasonably easy for non-programmers to learn. (Whether that turned out to be true or not is open to debate!) Apple provides a tool called Script Editor (in `/Applications/Utilities`) that facilitates writing, running, and debugging scripts (although other, more advanced scripting environments also exist).

An app that can be controlled by AppleScript is said to be *scriptable*, and DEVONthink is scriptable in the extreme, exposing more than 100 verbs (commands) and more than a dozen nouns (objects that can be acted on), each with various properties (parameters).

However, you needn't know any AppleScript to start using these capabilities. DEVONthink includes a huge number of preinstalled AppleScripts, which can perform an astonishing range of useful activities as they stand—and can also be used as models when creating your own scripts. These scripts can be used without any special knowledge, in most cases simply by choosing them from a menu—so it's like having hundreds of extra features to play with!

> **Tip:** DEVONthink's AppleScripts are installed automatically when you first run the app, but you can reinstall them if needed by choosing DEVONthink > Install Add-ons, checking Additional Scripts, and clicking Install.

I encourage you to try them out, and then if you're interested, open a few of them in Script Editor to see how they work.

Included Scripts

DEVONthink's preinstalled scripts fall into several broad categories:

- **Menu scripts:** These scripts appear on DEVONthink's Scripts menu only when DEVONthink is running, and thus are intended to be used from within DEVONthink. This is the largest category, with well over 100 scripts. The script files themselves are stored in `~/Library/Application Scripts/com.devon-technologies.think/Menu` (and its subfolders); if you add your own script to that folder (or even to a subfolder you create yourself), they'll appear on the menu too. A few noteworthy examples:
  - *Chat:* Use an LLM to geolocate an image, create a new image, and transform or translate text.
  - *Images:* Among the scripts on this submenu are ones that can rotate or flip an image, or scale it to various sizes—handy since DEVONthink itself can't resize graphics, only zoom in or out when viewing them.
  - *Reminders:* These scripts create an event or to do in Calendar (or various third-party programs, such as OmniFocus and Things) based on the selected item in DEVONthink—including a link to the item.
  - *Sheets:* Although I said earlier that DEVONthink's sheets can't do calculations, as spreadsheets can, these scripts add a couple of rudimentary spreadsheet features, such as summing and averaging rows or columns.

Note: DEVONthink has its own Scripts menu, which appears to the left of the Help menu. You may *also* have a systemwide Script menu on the right side of the menu bar that is available in all apps. (You can enable or disable this menu in Script Editor > Settings > General.) The scripts above appear on DEVONthink's Scripts menu; the app-specific scripts described later in this list appear on the systemwide Script menu.

- **Smart rules scripts:** A smart rule, discussed earlier in this chapter (see Work with Smart Rules) can trigger an AppleScript to run when the rule's criteria are met. DEVONthink includes a number of prewritten scripts for smart rules, stored in `~/Library/Application Scripts/com.devon-technologies.think/Smart Rules`; again, you can add your own scripts to this folder.
- **Reminders scripts:** These scripts are available as actions that run when a reminder's alarm is triggered (refer back to Use Reminders). DEVONthink includes no prewritten toolbar scripts, but you can add your own to `~/Library/Application Scripts/com.devon-technologies.think/Reminders`. Quit and reopen DEVONthink to use the scripts.
- **Toolbar Scripts:** You can customize a DEVONthink toolbar to add buttons that run specific AppleScripts. Although DEVONthink includes no prewritten toolbar scripts, you can add your own to `~/Library/Application Scripts/com.devon-technologies.think/Toolbar`. You must then quit and reopen DEVONthink, and then choose View > Customize Toolbar to add your custom script to the toolbar.
- **App-specific scripts:** DEVONthink includes numerous scripts that appear on the systemwide Script menu in other apps (such as DEVONagent, Mail, Outlook, and Safari), enabling you to import content of various kinds and formats into DEVONthink. These scripts are stored in `~/Library/Scripts/Applications/Application Name`.

Note: New in version 4.4 are scripts for MailMaven (see my free book *Take Control of MailMaven*) that can add messages and/or attachments to DEVONthink.

A few examples for Safari:

- *Add linked images to DEVONthink:* This script looks for thumbnails on a webpage that link to larger images, and downloads the full-size image files into DEVONthink.

  - *Add links to DEVONthink:* Similar to the last script, this one looks for links on the current webpage and adds each one to DEVONthink as a bookmark.
  - *Add tabs to DEVONthink:* This script adds bookmarks for all open Safari tabs to DEVONthink.

- **Folder Action Scripts:** These scripts (located in `~/Library/Scripts/Folder Action Scripts`) are designed to be attached to folders such that when anything new appears in the folder, DEVONthink automatically imports it (with or without OCR) or indexes it.

DEVONthink also offers a feature called "triggered scripts," which lets you attach a specially written AppleScript to any item in your database and have that script run whenever you select that item. These scripts can be stored anywhere on your Mac, and DEVONthink does not include any prewritten examples. I can't think of any action I'd want to trigger automatically upon merely *selecting* an item in DEVONthink, so I won't say more about this except to mention that you can find details in the documentation (search for "triggered scripts").

Extra Scripts

Besides the automatically installed AppleScripts, DEVONthink includes dozens of optional AppleScripts in the Support Assistant—choose Help > Support Assistant and click the Install Extras link at the bottom of the window followed by Scripts to see and install them.

Writing Your Own Scripts

One way to figure out how to automate something in DEVONthink using AppleScript is to open a related example script in Apple's Script Editor and see how it's constructed. To view the complete list of AppleScript commands available in DEVONthink, in Script Editor, choose File > Open Dictionary, select DEVONthink, and click Choose. The most interesting terms are in the DEVONthink Suite.

Pro and Sever versions of DEVONthink 4 make it even easier to create your own AppleScripts, optionally with the help of your favorite LLM.

Choose Data > New > Script to open DEVONthink's built-in Script Editor (**Figure 86**).

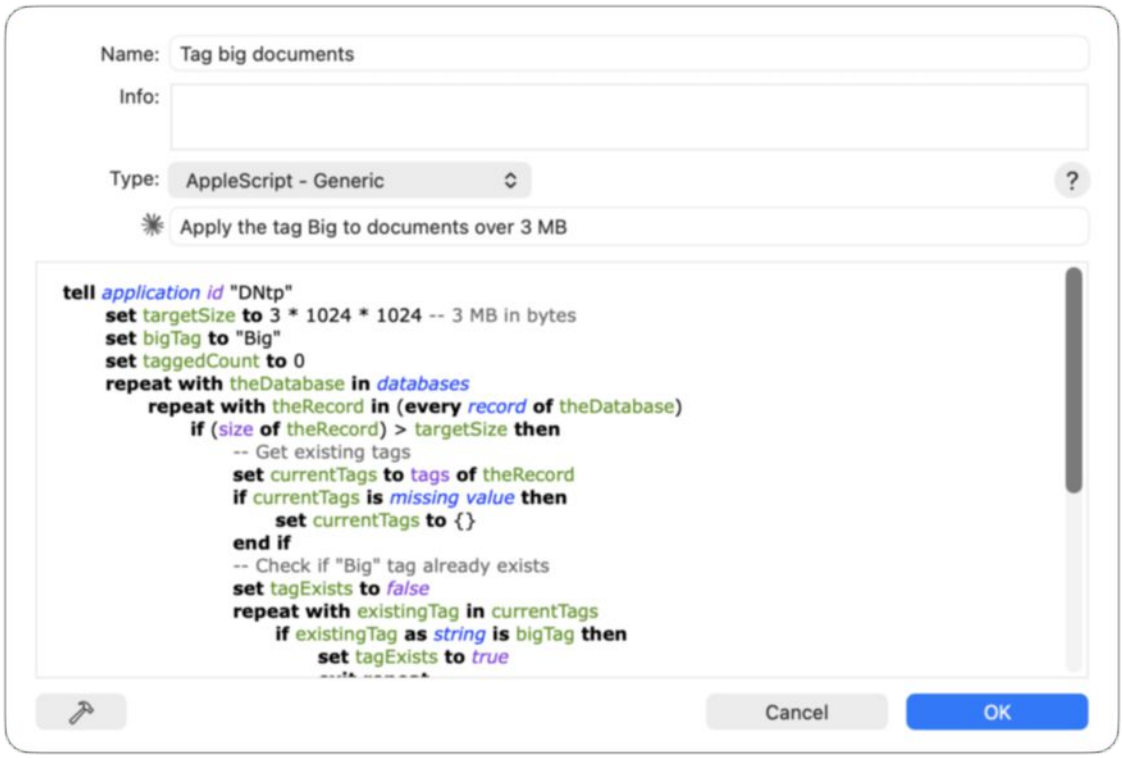

Figure 86: Use an LLM to request a custom AppleScript.

You can type in or paste a script into the large field at the bottom. Or, for AI assistance, type a prompt into the field below the Type pop-up menu and press Return. DEVONthink creates the script you requested; to save it as a new document, click OK. It may not be perfect the first time, but it is likely to have produced a useful starting point. The prompt shown above wrote this AppleScript:

```
tell application id "DNtp"
	set targetSize to 3 * 1024 * 1024 -- 3 MB in bytes
	set bigTag to "Big"
	set taggedCount to 0
	repeat with theDatabase in databases
		repeat with theRecord in (every record of theDatabase)
			if (size of theRecord) > targetSize then
				-- Get existing tags
				set currentTags to tags of theRecord
				if currentTags is missing value then
					set currentTags to {}
				end if
				-- Check if "Big" tag already exists
				set tagExists to false
				repeat with existingTag in currentTags
					if existingTag as string is bigTag then
						set tagExists to true
						exit repeat
					end if
				end repeat
				-- Add the tag if it doesn't exist
				if not tagExists then
					set end of currentTags to bigTag
					set tags of theRecord to currentTags
					set taggedCount to taggedCount + 1
				end if
			end if
		end repeat
	end repeat
	display notification "Tagged " & taggedCount & " records with
'Big' tag."
end tell
```

To learn more about using AppleScript generally, including tutorials and example scripts, visit MacOSXAutomation's AppleScript page or the MacScripter website. DEVONthink's documentation also has helpful information about getting started with DEVONthink-specific AppleScripts; see the "Basic AppleScript Terminology" topic. For more on scripting DEVONthink specifically, try the Learn how to automate DEVONthink Pro category within the DEVONtechnologies discussion forum.

Note: While DEVONthink does not include direct support for Automator, you can still embed AppleScript in Automator workflows. This provides a way to control DEVONthink from Automator.

Use Shortcuts

DEVONthink adds more than three dozen actions (and a Focus filter) to the Shortcuts app, which means you can create shortcuts that interact with DEVONthink even if you don't want to bother with AppleScript. Although the range of potential actions is smaller, you can add, update, find, move, open, and get the contents of various items; perform OCR; send an AI chat prompt; get an AI summary; and more. These actions also work in DEVONthink To Go.

Use Smart Templates

Earlier, in Template, I described how to create documents from pre-built templates and edit those templates or create your own. I also mentioned a variant called a smart template, which also appears in the Data > New from Template submenu but is composed of AppleScript rather than a simple document with placeholders. I'd like to say a bit more about smart templates here.

Smart Templates enable you to perform any number of complex automated actions in the course of creating a new DEVONthink document. For example:

- The Daily Journal smart templates (in Data > New from Template > Productivity) create a document that includes a quote (fetched from a web service) and the day's news headlines (fetched from another web service).
- The Project smart template (in the same submenu) creates a group tag hierarchy, which can include contact information selected from the Contacts app and a project name that you're prompted to provide.

A smart template can be interactive, asking you to supply information that it then uses when creating your new document(s), tag(s), or group(s); it can also use logic to analyze or process information and behave differently depending on any of numerous variables, including information found online.

However, unlike smart groups, smart rules, and conventional templates, smart templates are *not* easy to create. They're built almost entirely in AppleScript, and so unless you have a fair bit of facility with the language, creating a smart template that works just the way you want may be challenging.

I suggest, as does the DEVONthink documentation, that you start by opening, examining, and modifying (copies of) some of the existing smart templates to see how things are done. You can find these in subfolders of `~/Library/Application Support/DEVONthink/Templates.noindex`; they're the packages with the `.templatescriptd` extension. Right-click (or Control-click) one of these, choose Show Package Contents from the contextual menu, and examine the files inside—especially `Contents/Resources/Scripts/main.scpt`.

Sync DEVONthink Databases

If you have multiple Macs—or a Mac and one or more iPhones or iPads—you'll probably want to use DEVONthink on each one, and that in turn almost certainly means you'll want your data to stay in sync across your devices. We've all become accustomed to near-instant syncing of data such as email, contacts, and calendars. In addition, cloud services like Dropbox and iCloud Drive enable us to keep files and folders in sync everywhere. You can have that same experience with your DEVONthink data.

Although DEVONthink has excellent sync capabilities, they work differently from other apps and services you may have used, and the configuration is a bit unusual. If you're setting up syncing for the first time, there are a few things you'll have to know, but after the initial setup, syncing should be nearly transparent.

Tip: If your goal in syncing DEVONthink data between two Macs is less about having the data on two Macs and more about giving another person access to the data, see the sidebar later in this chapter, Choosing a Sharing Strategy, for tips on different methods of making your DEVONthink data available elsewhere.

Understand Sync Basics

Before you jump in and set up syncing, you should be aware of the numerous choices DEVONthink offers and how they compare. It's worth taking a few minutes to think through your options in advance in order to achieve your desired results.

External vs. Built-in Syncing

As I explained in How and Where Databases Are Stored, even though DEVONthink stores all your documents as individual files on disk, it also keeps a great deal of information in a proprietary database; the database and the files together are kept in a *package*—a folder that looks like a single file. Because of the way databases work, syncing is tricky and dangerous if you try to do it *outside* DEVONthink (for example, by using a sync app such as ChronoSync to sync files over your local network, or by storing your database in a folder that syncs via a cloud service). Making even a small change to a single document changes not only the corresponding document file but also various parts of the database. As a result, if the data is synced externally while the database is open in more than one place, errors and data loss could occur.

However, using DEVONthink itself to perform the syncing is another story altogether. DEVONthink can sync any or all of your databases with any number of other Macs, iPhones, and iPads, and it's safe to make changes with the database open on more than one device—DEVONthink knows how to merge your changes quickly and intelligently.

Sync Locations

Any database can sync to one or more locations (or none, which is the default); you can choose whichever combination best meets your needs. Conceptually, the various destination choices fall into two categories: *direct*, in which a database syncs between two copies of DEVONthink running on different devices; and *indirect*, in which each copy of DEVONthink syncs independently with a *sync store*—a copy of the database stored in central location, such as a file server or cloud service.

Each method has certain implications:

- For direct Mac-to-Mac (or Mac-to-iPhone/iPad, or iPhone/iPad-to-iPhone/iPad) syncing to work, DEVONthink must be running on both devices, which must also be on the same network. If this

arrangement is possible, direct syncing is the fastest and most efficient option, and has the lowest risk of conflicts.

- Indirect syncing lets any copy of DEVONthink sync at any time, without regard to whether another copy of DEVONthink is running. As long as each device can reach the sync destination, the devices need not even be on the same network. But because each Mac, iPhone, or iPad syncs independently, it becomes *slightly* more likely that a given document could change in more than one location between syncs, resulting in a conflict (see Set Syncing Options).

- With either method, you can sync more than two devices. However, each sync operation occurs between a single pair of locations. As a result, in order for any particular change to propagate from one device to another, two sync operations may be required (depending on the timing of the syncs).

DEVONthink uses the term *location* to refer to a sync endpoint, which can be another Mac, iPhone, or iPad on your local network (if you're doing a direct sync) or the cloud storage destination for your sync store (if you're doing an indirect sync). Here are the location types you can choose, and what you should know about each:

- **Bonjour (direct connection):** This option lets you sync directly with a copy of DEVONthink running on another Mac, iPhone, or iPad on your local network (or even over a USB cable; see How to Sync by Wire). Although the syncing is bidirectional, one device effectively acts as a server and the other(s) as client(s). You must set up a password on the server and then authenticate with that password on your other devices; this prevents unauthorized users from syncing with your databases.

- **Local sync store:** The desktop versions of DEVONthink can sync a database to any folder you can navigate to in the Finder; typically, you would choose a folder on a local network server, although you could also use an external hard drive, flash drive, or other storage. After you've synced one copy of DEVONthink to this folder, copies running on other Macs can optionally sync with that same location. Unlike a direct (Bonjour) connection, this requires making a sepa-

rate copy of your sync data; on the other hand, it also permits syncing when one or more of the devices is offline.

- **Dropbox account:** If you have a Dropbox account with enough free space to hold your database, you can sync to it. You can then sync your other devices to the same Dropbox account. Keep in mind that you can't sync to a Dropbox folder someone else has shared with you; for security reasons, DEVONthink can read and write files only in a single, specific location in your Dropbox. When you set up Dropbox syncing the first time, DEVONthink asks for your Dropbox credentials to authorize access.
- **iCloud (CloudKit):** There are *two* methods of syncing data via iCloud. The modern one uses an Apple framework called CloudKit. Like the legacy version of iCloud syncing (described next), CloudKit requires enough space in your iCloud account to hold all your DEVONthink data, and does not require additional authentication steps like Dropbox. But the similarities end there. CloudKit directly writes to and reads from cloud storage rather than relying on a hidden folder within iCloud Drive, making it significantly faster and more reliable than the legacy method. It's also more transparent, as DEVONthink can accurately report syncing progress. Changes are reflected almost immediately, and no additional storage space is required on the initial sync.
- **iCloud (Legacy):** The legacy version of iCloud syncing relies on iCloud Drive: DEVONthink copies its files to a hidden iCloud folder, and then iCloud Drive syncs them up to the cloud and down to your other devices…whenever it gets around to it. On the plus side, legacy iCloud sync (like the CloudKit version) requires no additional authentication steps. On the other hand, iCloud (Legacy) syncing is generally slower, DEVONthink is unable to show you sync progress accurately, and your initial sync with iCloud may temporarily require lots of extra disk space. Be sure to read Database Size Considerations, ahead, to understand how this works—which may not be what you expect!

Tip: If you are trying to decide on an iCloud sync method, choose CloudKit—period. There is no advantage whatsoever to using Legacy. It's still supported, however, so that syncing doesn't suddenly stop when you upgrade from an older version of DEVONthink. Unfortunately, you can't convert one method to the other. If you were already using what is now called Legacy, you'll have to turn that off, set up CloudKit, and allow DEVONthink to resync from scratch.

- **WebDAV Server or CloudMe:** You can sync your database to a WebDAV server on your local network or on a remote network. You'll have to specify the server address, the path to the desired location on the server, a Store Name (the filename you want to use on the server), your username, and your password. (DEVONthink uses HTTPS and/or a custom port if those are included in the URL.) Because the cloud storage offered by CloudMe is accessible over WebDAV, you can use those as locations for a sync store, and DEVONthink even offers shortcuts to set up those services.

Note: You may have noticed that this list does not include many other cloud providers, such as Google Drive and Microsoft OneDrive. Even though such services can sync folders on your Mac's disk, that type of external syncing (see External vs. Built-in Syncing) is not reliable enough for DEVONthink data.

Regardless of how you choose to sync your databases, DEVONthink strongly encrypts your data using AES-256. For direct connections, DEVONthink encrypts the data in transit. For all indirect connections, the sync stores are encrypted as long as you enter an encryption key when setting them up (see Configure Syncing), which I recommend.

Database Size Considerations

As I mentioned earlier in the sidebar How Many Databases Do You Need?, DEVONthink's performance can suffer if a single database grows too large. That applies to syncing performance too. Although there are no hard limits on database size, depending on variables such as the bandwidth of your internet connection, the sync method you use, and the kinds and sizes of files in your database, databases over a few gigabytes in size (give or take) might sync much more slowly than

you like on their initial upload or download—or if you routinely add very large files. If you have large databases and are frustrated by the pace of syncing, splitting them into smaller databases may help.

But syncing *speed* isn't the only thing to worry about when it comes to database size—you should also bear in mind disk space requirements. Direct connections, WebDAV/CloudMe connections, and iCloud (CloudKit) don't use any extra space on your Mac for syncing, while local sync stores are typically on network volumes or other external storage. But iCloud (Legacy) does require extra storage on your main disk, at least temporarily—however large your DEVONthink databases are, you'll need that much space *again* for your initial sync, though that space will free up again afterwards. (Dropbox sometimes needs extra space too, but we'll get to that in a moment.) If you have loads of empty space on your disk, there may be nothing to worry about. But if you're highly constrained in your storage space, this fact may give you yet another reason not to opt for iCloud (Legacy).

When you select Dropbox as a sync location, DEVONthink initially copies all your data to Dropbox's servers, and then—assuming you have the Dropbox app installed—the Dropbox app copies all that data *back* to the `Apps/DEVONthink Packet Sync` folder inside your Dropbox. Afterwards, every time you sync, changes in your DEVONthink database—still stored in its original location—are sent to the copy in your Dropbox, while any changes in the Dropbox copy of your database are absorbed into your main copy. The direct connection between DEVONthink and Dropbox means it works even if you *don't* have the Dropbox app installed on your Mac. And it's faster and more reliable than letting Dropbox sync the files externally.

If you leave it at that, the amount of storage space on your Mac used by DEVONthink will double: the original copy of your DEVONthink database will still be in `~/Databases` or wherever you put it, and a second copy will be in your Dropbox folder. (The same goes for any other Macs that use the same Dropbox account.) But you can avoid the storage hit by turning on Dropbox's Selective Sync option for your DEVONthink data, as I explain in Add an Indirect Connection, ahead.

This feature lets you pick and choose which of your Dropbox folders are stored locally on any device.

With iCloud (Legacy), DEVONthink makes local copies of all your files in the iCloud Drive folder; then, after they sync (which may take longer than with Dropbox, as it's handled by macOS), DEVONthink deletes those local copies. Although it isn't quite like Dropbox's Selective Sync, you do get approximately the same end result—but only after syncing is complete. That means you'll need to have at least as much free space on your disk as the size of your database for your initial sync; and afterwards, the amount of storage space used will rise and fall as files are synced and then the extra copies are deleted. iCloud (CloudKit), by contrast, enables DEVONthink to read from and write to cloud storage directly, without the extra folder on your disk.

In sum, if you have very little free space on your Mac—or if you want the best syncing performance—either iCloud (CloudKit) or Dropbox will be a better choice than iCloud (Legacy), and of the two, iCloud (CloudKit) has the advantage of not requiring you to jump through any additional hoops to exclude that extra local copy of all your files.

Choose Your Sync Method(s)

Which option is best for you? That depends on numerous factors, such as database size (as I just described), which services you have accounts with, and personal preference. Personally, after having used Dropbox for a number of years, I switched to iCloud (CloudKit) once that option became available, and have never looked back. But then, I was already paying for 2 TB of iCloud storage, giving me plenty of room for my DEVONthink data; your mileage may vary.

Once you've chosen one or more sync destinations for a given database, you can optionally configure DEVONthink to sync automatically, manually, or on a recurring schedule.

Choosing a Sharing Strategy

Suppose a colleague or family member needs access to all or part of your DEVONthink database from time to time. You can accomplish this in numerous ways. Which one is best? It depends on your needs:

- **Sync the databases directly:** If both people have licensed copies of DEVONthink—running on Macs, iPhones, or iPads on the same network—and if the other person needs full access to an entire database on a regular basis, then a direct device-to-device sync is most efficient.
- **Sync the databases indirectly:** If both people have DEVONthink but are on different networks, or if you can't guarantee that both copies will be running at once, syncing to a mutually accessible location (such as cloud storage, a shared network volume, or a WebDAV server) is the easiest way to ensure full access to a database.

This chapter covers these first two types of syncing, both of which can also be used with DEVONthink To Go (see Use DEVONthink To Go). However, depending on your needs, a different method of sharing DEVONthink data might work better for you:

- **Use the built-in web server:** If the other person mainly needs to view documents in your database or occasionally create or upload new ones (but not modify existing documents), or when it doesn't make sense to use the disk space and network bandwidth required to sync an entire database to another location, you can Use DEVONthink's Web Server (which requires DEVONthink Server).
- **Share or export the data:** When the other person needs only a single document, or only a handful of documents—and it's not crucial to have access to updated versions of these documents later—you can send them via email (select one or more documents and choose Send by Email from the Actions menu), Share Data using the Share pop-up menu, or Export Data and then share it over a network or on physical media of some kind.

Configure Syncing

Syncing is quite easy—it takes much longer to explain it than to set it up! The procedure requires three quick steps: Add a Location, Select or Import Your Database(s), and Set Syncing Options. You must go through these steps on each device you want to sync.

Note: DEVONthink To Go uses the same sync mechanism as the Mac version of DEVONthink, but I don't go into detail about setting up syncing on an iPhone or iPad in this chapter. For that, see Configure and Sync DEVONthink To Go in the next chapter.

All the following steps take place in Settings > Sync, which initially looks like **Figure 87**.

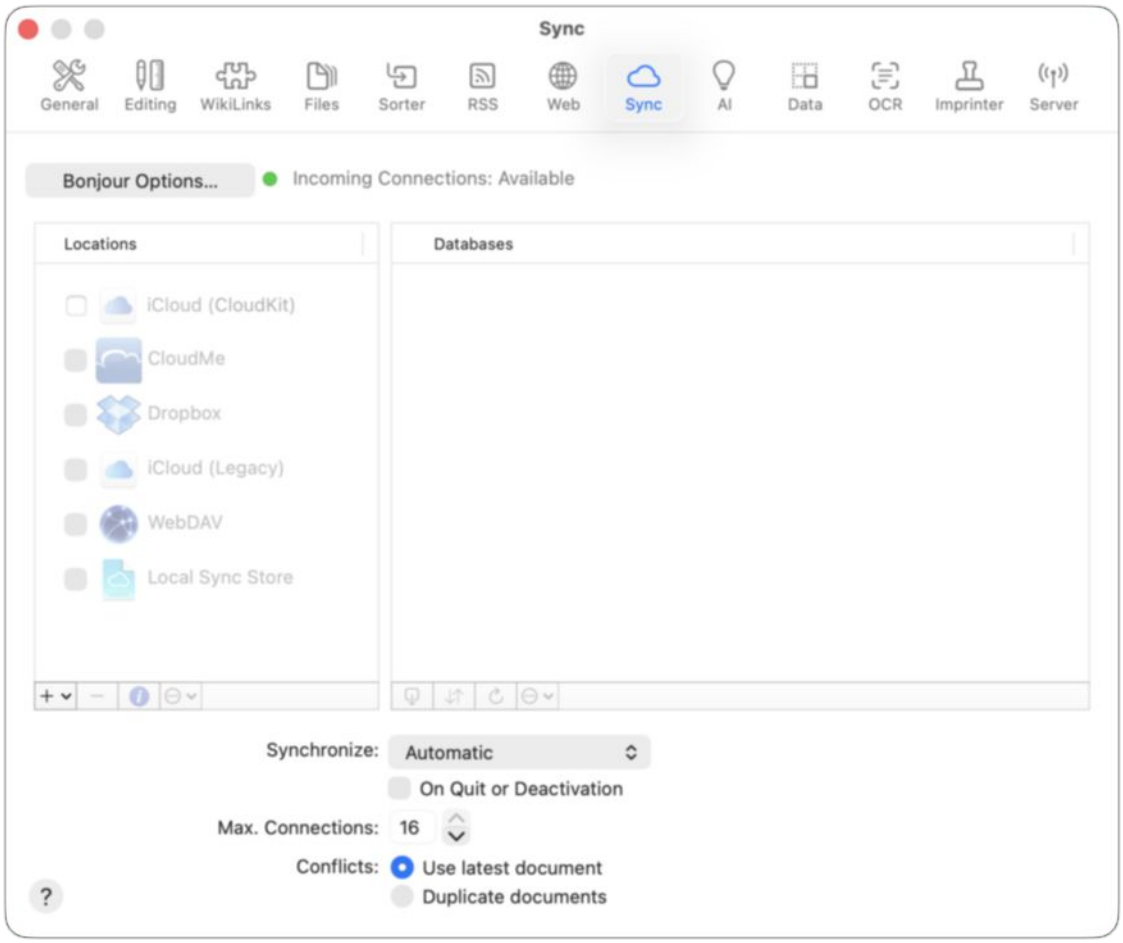

Figure 87: DEVONthink's Sync setting pane looks like this before you configure syncing.

Add a Location

The Locations list on the left side of the Sync setting pane shows all the locations to which you can sync DEVONthink. The list includes any Macs on your local network that are running DEVONthink and configured to accept incoming Bonjour connections, and one instance each of the various other account types. (You can add more, if need be—for example, you can have multiple CloudMe accounts, multiple WebDAV accounts, and so on, but only one iCloud account, though both CloudKit and Legacy methods can be selected at once. You're also limited to one Dropbox *account*, though that account can contain multiple sync stores.)

To add a location, select its checkbox and fill in the relevant details in the dialog that appears. Each location asks for slightly different information, and in particular, the details differ significantly between direct connections (discussed next) and indirect connections such as Dropbox, iCloud (CloudKit or Legacy), and WebDAV (see Add an Indirect Connection).

Add a Direct Connection

For direct connections, there's not even a checkbox to select until you set up one of your Macs to function as a server (see Set Bonjour Options, just ahead). However, once you've done so, connecting from another device requires little more than entering your password (see Connect to a Local Mac).

Direct connections are different from all the other location types in that you're not syncing all devices to a central location; instead, one device (a Mac, for the purposes of this chapter) functions as a server and your other devices function as clients. Whichever Mac is going to be the server has to be set up before any of the clients. Syncing works the same way regardless of which Mac you choose as the server. If you have one Mac that's on and connected to your network all the time, that one would be a better choice for a server than a Mac that spends a lot of time turned off, asleep, or offline. Other than that, the choice is pretty arbitrary.

Once you've chosen a Mac to function as the server, you must set its Bonjour options (as described next). Then, on the *other* Macs on your network, follow the steps under Connect to a Local Mac.

Set Bonjour Options

On the Mac you want to function as a server, click Bonjour Options and fill in the dialog that appears (**Figure 88**).

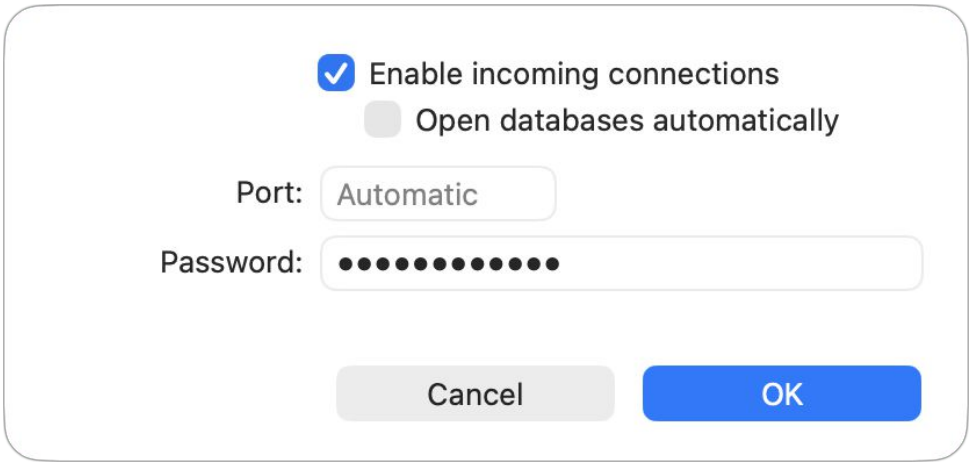

Figure 88: Set up incoming connections in this dialog.

Here are the options:

- **Enable incoming connections:** Select this to permit DEVONthink on this Mac to accept connections from DEVONthink on other devices on your local network. (If this is deselected, then regardless of your other settings, this Mac cannot function as a server.)
- **Open databases automatically:** Once you've set up syncing and selected databases from this Mac on another device, you might (accidentally or intentionally) close one of those databases on this Mac, which would prevent it from syncing to your other devices. To avoid that problem, select this checkbox, which permits clients to request that this Mac open any databases previously set up for syncing when a sync is required.
- **Port:** This is optional. If you leave it blank, DEVONthink picks a random, high number—and that's fine for most users. However, if you want to use a specific port number (perhaps because of a firewall configuration on your network), enter the port number here.

- **Password:** A password is mandatory; it enables DEVONthink to encrypt your data while it's in transit over your network, and prevents eavesdropping.

After you've filled in a password and at least selected the first checkbox, click OK. Once you've done that, this Mac appears in the Locations list as an option for other Macs, iPhones, and iPads on your local network. On those devices, you can then proceed to the next topic.

Connect to a Local Mac

Once you have a server set up to receive connections, go to your next Mac, open Settings > Sync, and select the checkbox next to the first Mac's name in the Locations list. In the Password alert that appears (**Figure 89**), type the password you set up on the server Mac. (You don't even need to press Return or click OK!) That's it—you're connected. Proceed to Select or Import Your Database(s).

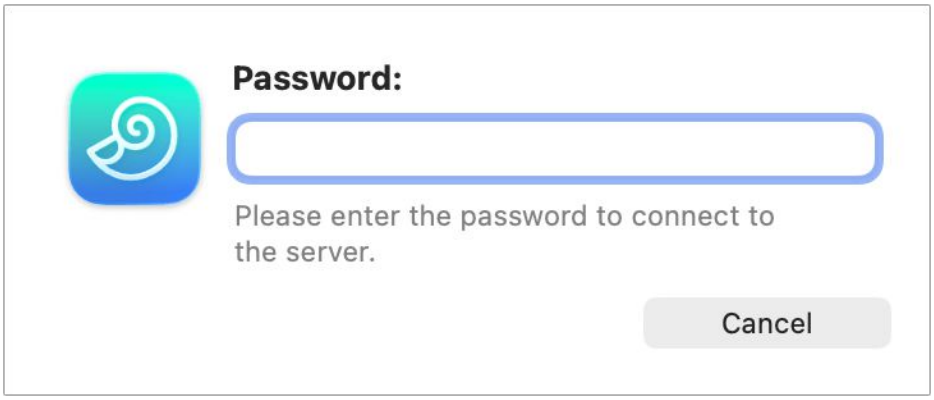

Figure 89: Enter the password you set up on the server Mac here.

Don't Do Mutual Syncs

Let's say you've set up Mac A as a server (by selecting "Enable incoming connections" in Bonjour Options), and you've set up Mac B to be a client (by selecting Mac A in Mac B's Locations list). You may be tempted to do the reverse, too—enable incoming Bonjour connections on Mac B, and select Mac B as a sync location on Mac A. Don't do that!

All syncs in DEVONthink are bidirectional. So it's unnecessary—and indeed, a bad idea—for two Macs to function as both server and client *for each other*. Doing so won't solve any problems, but it will decrease performance, and may increase the likelihood of sync errors.

Add an Indirect Connection

For indirect connections (all locations other than direct connections), after you select the appropriate checkbox in the Locations list, you must specify account and sync store settings in a dialog (**Figure 90**).

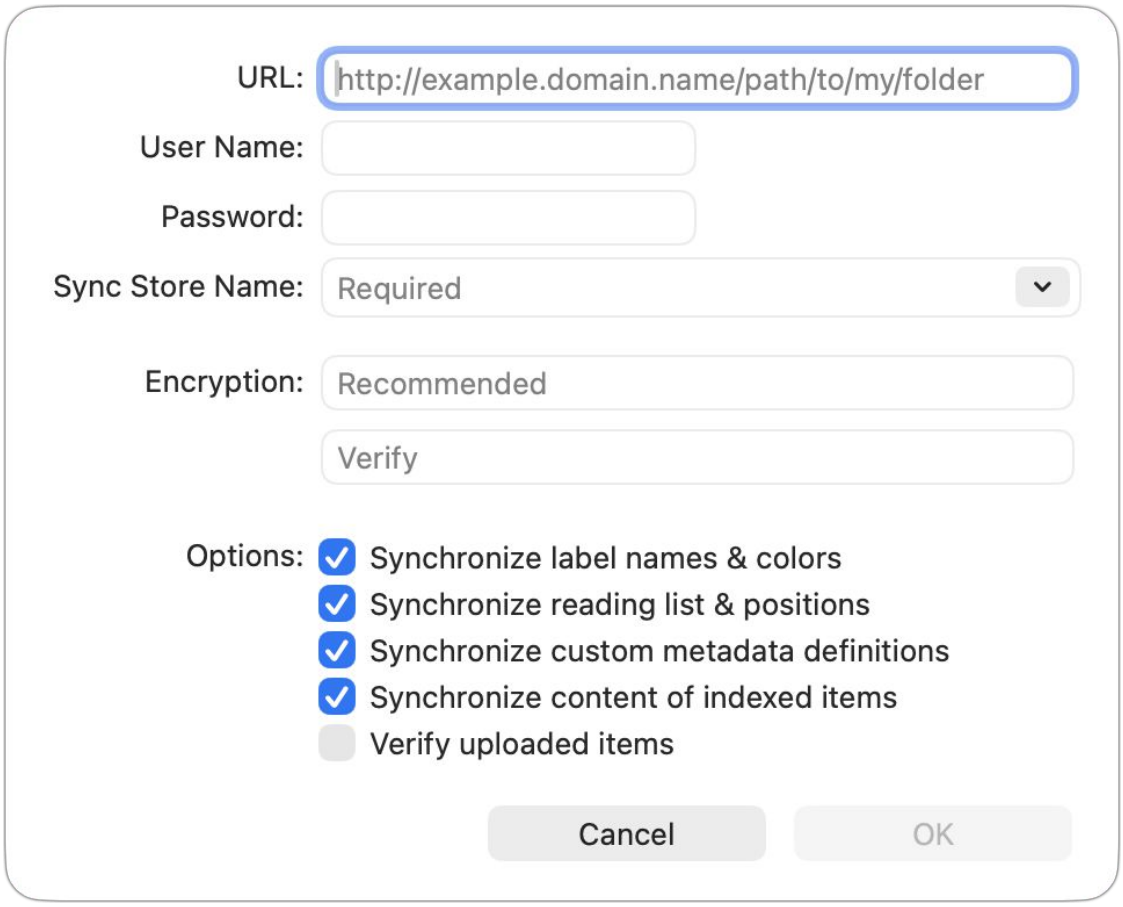

Figure 90: This dialog appears after you select WebDAV in the Locations list. (Other locations display variations on this dialog with fewer controls.)

The fields and controls in this dialog vary somewhat from one location to another. You may see one or more the following:

- **URL:** For WebDAV locations only, enter the server's full URL. (For local sync stores, in place of a URL, a standard file selection dialog appears; use its menu to select a location.)
- **User Name and Password:** For WebDAV locations, enter the credentials you use to log in.
- **Sync Store Name:** If prompted, enter a name for the sync store—that is, the package that's stored in your Dropbox, on a local server,

or wherever you choose—that serves as the central repository for syncing between this Mac and other devices. (For local sync stores, the field is labeled Save As.)

What sort of name should you enter? Well, the sync store can hold sync data for multiple databases if you like, so you may not want to name it after a particular database. It can also sync data from many devices, so you shouldn't name it after your Mac. In fact, the only reason the name might matter is if, for some reason, you wanted to set up multiple sync stores in the same location. So, enter anything you like here, though for compatibility reasons, it's safest not to include spaces or punctuation other than hyphens and underscores. (I named mine HomeDepot. As in, you know, a store where you can buy sinks. Because that's how I roll.) Once you've set up a sync store for one device, you should enter *exactly* the same name when setting up additional devices.

- **Encryption:** If you want your sync store to be encrypted—*and you absolutely do!*—enter and verify a password in the fields provided.
- **Options:** The bottom of the dialog has a series of checkboxes that let you specify sync options for this sync store:
  - *Synchronize label names & colors:* Choose whether to sync label names and colors (see the sidebar Using Labels and Flags) using this sync store. It's optional because this is a global setting, not a database-specific setting, and you may want different copies of DEVONthink to use different label names or colors.
  - *Synchronize reading list & positions:* Select this to synchronize reading and playback positions along with document contents. (This applies to PDF, plain text, rich text, Markdown, audio, and video files.)
  - *Synchronize custom metadata definitions:* This option, selected by default, lets you sync Custom Metadata definitions across devices.
  - *Synchronize content of indexed items:* By default, DEVONthink syncs the content of any indexed items (that is, items whose

original files are not stored within your DEVONthink database), so you can view and work with the files on your other devices. However, if you deselect this checkbox, DEVONthink syncs only their metadata, not the original files themselves.

Note: This option must be selected if you'll be syncing your data to a mobile device running DEVONthink To Go.

- *Verify uploaded items:* Select this checkbox to make DEVONthink verify the integrity of each file after it has uploaded to another device. This option is usually unnecessary (and may slightly increase the amount of time each sync requires), but if you experience missing or corrupted files during syncing, you can enable it to confirm that each transfer took place correctly.

Once you've filled in the dialog with all required information, click OK. DEVONthink copies your sync store to the location you selected.

You can then move on to Select or Import Your Database(s)—*unless* you added a Dropbox location, in which case you should complete a few additional steps first:

1. If your web browser opens automatically to a sign-in page for Dropbox, enter your Dropbox username and password, and click Sign In. (If your browser does not open automatically, skip to step 5.)

2. If you have Dropbox's two-factor authentication enabled (always a good idea, though not a requirement to sync with DEVONthink), you'll be prompted to enter your authentication code. Do so and click Submit.

3. Click Allow to give DEVONthink access to its own folder (and no other folders) in your Dropbox.

4. Your browser should return you to DEVONthink to finish the setup process; if it doesn't, you can switch back manually.

   At this point, DEVONthink begins copying your sync store to Dropbox—but you aren't done yet. I strongly recommend that you use Dropbox's Selective Sync feature to avoid storing a local copy of the

synced data, as I described in Database Size Considerations. To do this, continue with the remaining steps.

5. Go to the Dropbox menu on the menu bar.
6. Click your account photo or avatar in the upper-right corner, and choose Preferences from the pop-up menu.
7. Click Sync, then click Modify under "Selective sync."
8. Navigate to Apps and deselect the DEVONthink Packet Sync checkbox (**Figure 91**).

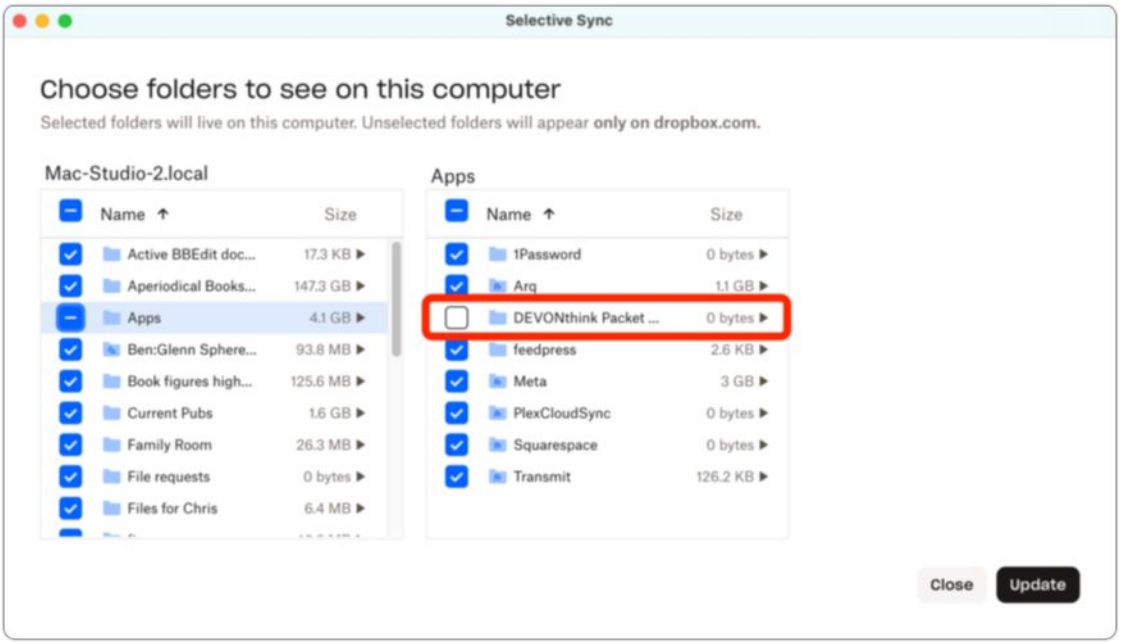

Figure 91: Deselect the DEVONthink Packet Sync checkbox to avoid making a duplicate copy of your sync data on your Mac.

9. Click Update.

Dropbox may take several minutes to remove the local copy of that folder.

Even though this procedure removes the sync folder from your Mac, it's still stored on the Dropbox servers, so you'll need to be sure you have enough storage space in your account to hold it. And, you'll have to repeat this procedure on each of your Macs.

Note: For most users, a single sync location is adequate. However, if you need to add more than one account of a particular type (as in, two Dropbox locations), you can click the plus button on DEVONthink's Sync setting pane and choose the desired account type from the pop-up menu.

Select or Import Your Database(s)

Now that you have a location (or more than one) configured, you must next determine which databases will sync to that location. You can sync all your databases to the same location, each to a different one, or certain databases to each of several locations—whatever you like. The most common scenario is to sync any given database to just one location.

With your location selected in the Locations list on the left, look in the Databases list on the right. (**Figure 92** shows the list as it might appear for a direct connection.)

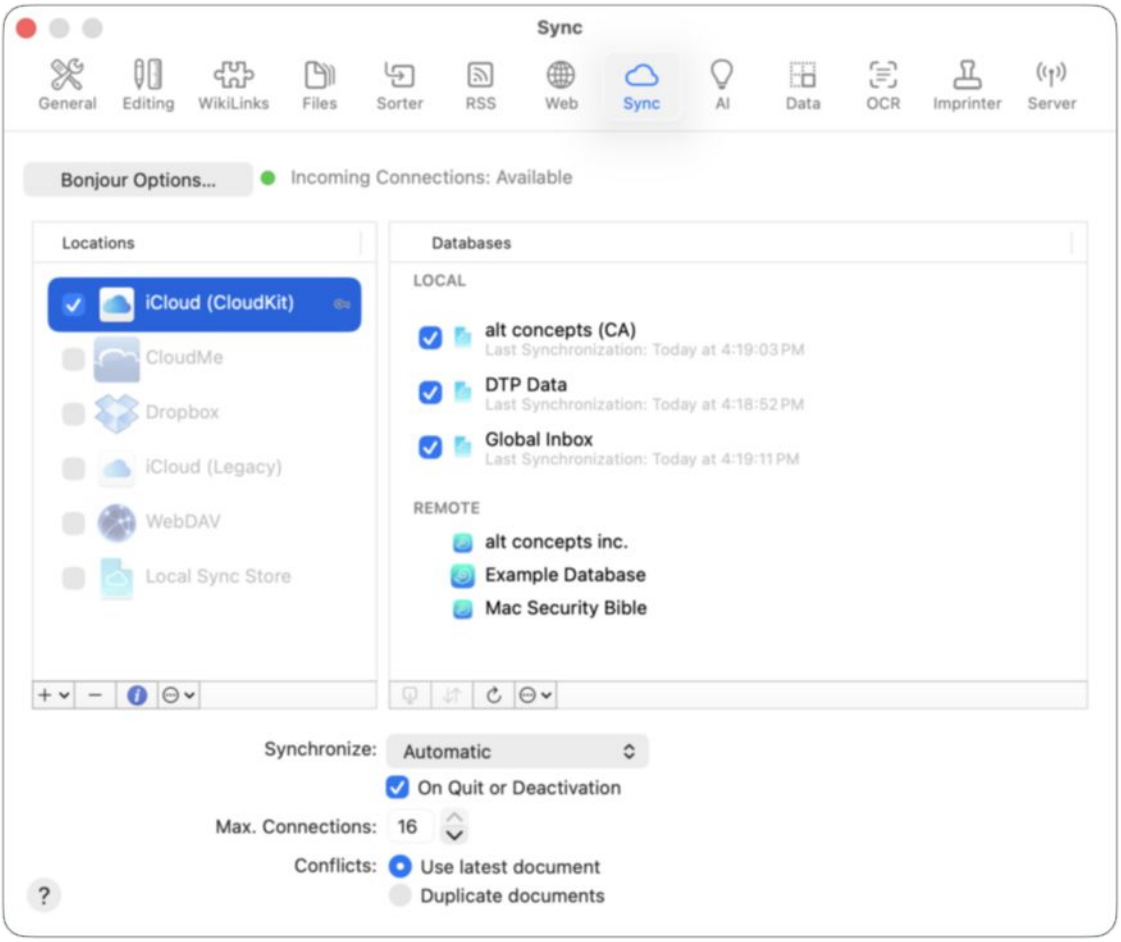

Figure 92: With a location selected (that is, not just checked, but also highlighted) on the left, select which databases to sync with that location on the right.

The LOCAL portion of the Databases list contains the databases currently open on this Mac. In the REMOTE portion, for direct connections, you'll see databases open on the other Mac that can be imported (or opened, if they already exist on your Mac but are closed); for indirect connections, you'll see databases in the sync store that do not already exist on this Mac. (If you previously synced a database between these two Macs in some other way—using file sharing, an external sync utility, or the previous version of DEVONthink's syncing capability, for example—and it's open on both Macs, it appears in the LOCAL section.)

Sync a Local Database

To sync a database in the LOCAL category, simply select its checkbox. If the location is anything but a direct connection, DEVONthink

immediately begins uploading your data to the sync store (or, if the database already exists in the sync store, merging it).

> **Note:** Because DEVONthink treats your global Inbox as a separate database, you must select Global Inbox separately from any other databases.

Sync a Remote Database

To sync a database in the REMOTE category, you must import it, thus creating a local copy. To do so, double-click the database in the REMOTE portion of the list. Leave the database's name as it is in the remote location, navigate to where you want it to be stored, and click Create. DEVONthink imports the database, enables syncing, and begins the sync process immediately.

> **Tip:** To import a remote database as an *encrypted* database, instead select it in the REMOTE portion of the list, right-click (or Control-click) it, and choose Import Encrypted Database (or, if applicable, Import Revision-Proof Database) from the contextual menu.

Use Additional Sync Controls

Under the Databases list are two additional icons you may find useful:

- **Sync now:** Click the Force Sync button to force an immediate sync, if syncing is not set to Automatic (see just ahead).
- **Refresh:** If the list of databases on this Mac, on the remote Mac, or in the sync store changed recently and the current selections don't appear here, click the Refresh button to refresh the view.

Set Syncing Options

The final three syncing options can be set at any time (including before setting up locations and databases). These settings, at the bottom of the Sync setting pane, apply to all locations and databases:

- **Synchronize:** When this pop-up menu is set to Automatic, the default, DEVONthink frequently checks for changes in both remote

and local copies of each database and syncs them with the other location soon after they occur. If you prefer to sync on a fixed schedule, you can instead choose “Every minute,” “Every 5 minutes,” “Every 15 minutes,” “Every 30 minutes,” Hourly, or Daily from this menu. Or choose Manually to sync only when you Click the Force Sync button. If you also want DEVONthink to sync when you quit the app, even if it’s not otherwise time to do so, check On Quit or Deactivation. (This can avoid surprises of last-minute changes that weren’t synced, though it also prevents DEVONthink from quitting instantly.)

- **Max. Connections:** DEVONthink can open up to 16 multiple, simultaneous connections to any location (8 for Dropbox), enabling it to copy multiple documents at the same time. If you suspect that DEVONthink is slowing down your network because it has too many connections active, you can reduce this number.

- **Conflicts:** If a document changes both locally and remotely between syncs (a rare occurrence when Synchronize is set to Automatic and you have a fast network connection), this set of controls determines what will happen. If you select “Use latest document,” the more recently changed document will overwrite the older one. If you select “Duplicate documents,” both copies sync in both directions—preventing data loss, but forcing you to manually sort out, later on, which version of each document you want.

Use DEVONthink To Go

If you have an iPhone or iPad, you can take your DEVONthink data with you and work with it when you're away from your Mac. For that matter, you can use the majority of DEVONthink's features on the go even if you don't have a Mac at all! To do this, you'll need an iPhone/iPad app called DEVONthink To Go 4.

DEVONthink To Go can be used at no cost with some restrictions. The free version can have only one database. Syncing, PDF editing, OCR, and Shortcuts support are disabled.

To unlock all the app's feature, you need a paid license:

- **DEVONthink 4 Pro or Server:** With an existing DEVONthink 4 Pro or Server license, there is no additional cost to register the app on your iPhone or iPad and unlock DEVONthink To Go 4. (This page covers all the details.)
- **Purchase a subscription:** If you don't have one of those licenses, you can pay for a subscription to DEVONthink To Go 4 at $2.99 per month or $19.99 per year.

DEVONthink To Go 4 has most, but not all, of the features found in the desktop versions of DEVONthink. This large subset of features makes it easy for you to view, create, capture, and manage information directly on your iPhone or iPad.

Note: The list of new features in version 4 is quite long, and I won't cover them all here, but highlights include major new items from the Mac version—support for generative AI, file versioning, custom metadata fields, a new search engine, and revision-proof databases—plus a redesigned user interface.

If you don't own an iPhone or iPad, or if you're not interested in taking your DEVONthink data with you, there's nothing to see here—move on to the next chapter, Get Information Out of DEVONthink. Otherwise, keep reading to learn about using this extremely handy tool.

Get to Know DEVONthink To Go

Just as DEVONthink for Mac is a complex product, DEVONthink To Go is quite deep, with a huge number of features that may not be obvious at first glance. Detailing all those features would require its own book, and I can offer only an overview in this chapter. I do, however, suggest you download the user handbook for DEVONthink To Go, which is available in PDF and EPUB formats.

So, what can DEVONthink To Go do? It appears to have, at a rough estimate, about 90% of the capabilities of the desktop versions of DEVONthink. For example, here's a *partial* list of what you can do in DEVONthink To Go:

- Sync data from DEVONthink for Mac (or DEVONthink To Go running on other iPhones or iPads) via Dropbox, iCloud (CloudKit or Legacy), CloudMe, WebDAV, or a Bonjour connection over Wi-Fi
- View any document type supported by iOS/iPadOS
- Capture data from other apps (such as bookmarks, PDFs, text, and images) to a specific database or your global Inbox
- Create new databases, groups, smart groups, and tags
- Create and edit documents in plain text, rich text (including RTFD), Markdown, and formatted note formats; rotate and apply filters to graphics; annotate PDFs; and convert (most) documents to other formats
- Add and view RSS feeds
- Move, duplicate, replicate, group, tag, or delete items
- Perform OCR on photos or scanned documents
- Use complex search criteria to find your documents
- Share documents using the share sheet
- View and add to your Reading List (as a built-in smart group)

- Add and edit WikiLinks (enable this in More ⊙ > Settings > WikiLinks Settings)
- Use your favorite LLM to chat with (and search) your documents
- Save and recover older versions of documents
- Create and use revision-proof databases (see Use Revision-Proof Databases)

However, you should also be aware of some limitations compared to the desktop versions of DEVONthink. Among the features DEVONthink To Go *does not* include are the following:

- Indexing documents stored elsewhere on your iPhone or iPad
- Splitting or merging arbitrary documents (though you can now merge multiple images into a PDF document)
- The Concordance feature

In short, DEVONthink To Go lets you view and manage your DEVONthink databases effectively with an iPhone or iPad, and can also function as a standalone tool for gathering and organizing information—but if you're a power user, you'll most likely find that it can't replace the desktop versions of DEVONthink.

Configure and Sync DEVONthink To Go

Assuming you want to use DEVONthink To Go mainly to store copies of documents from your desktop version of DEVONthink, you should configure syncing, and perform your first sync, before doing anything else.

As in the desktop versions of DEVONthink (see Sync DEVONthink Databases), sync configuration involves three elements—first add a location, then select databases, and finally (or whenever you prefer) set syncing options.

Add a Location and Select Databases

To add a location and select databases to sync in that location:

1. If you're not already on the home screen (where the global Inbox, smart groups, and databases live), tap the arrow in the upper-left corner of the screen until you get there.
2. Tap More > Settings.
3. Tap Synchronization > Locations and then tap Edit.

Note: You can also set up your iPhone or iPad to be a sync server; tap More > Settings >Synchronizations > Bonjour and turn on "Incoming connections" to do so. This feature works similarly to the equivalent Mac version; see Set Bonjour Options.

4. Tap the green plus icon next to the location type you want to add. (If you already have a location specified, tap Edit to see the list of locations.) For Dropbox accounts, follow the prompts to authenticate; for direct connections, enter the password when prompted.
5. For indirect connections such as Dropbox, iCloud (CloudKit or Legacy), and WebDAV, enter the requested information, which may include the sync store name and password; and, if applicable and desired, turn on "Verify uploaded items." If you already set up a sync store on another device, use its name and encryption key. (Refer back to Add an Indirect Connection for details on these options.)
6. Next to "Download files," choose Always to download full copies of every document, or On Demand to sync only metadata (with full documents available at a tap).

Note: If you choose On Demand here, you can override that setting for a given database or group, so that just that subset of your files sync all the time; see the sidebar On-Demand Syncing, ahead.

7. Optionally adjust the "Conflict strategy," Schedule, and Retain settings as described just ahead in Set Sync Options.
8. Tap Save.

At this point, your location has been created, and you need only select which databases to sync in that location:

1. Tap the location name.
2. Turn on the switch for each database in this location that you want to sync.

DEVONthink To Go starts syncing your data. While that's happening, you can continue using DEVONthink To Go normally.

> **Tip:** If you're using an iPhone or an iPad with a cellular radio, you might want to prevent DEVONthink To Go from syncing over a cellular connection. To do so, go to the main iPhone/iPad Settings app, tap Apps > DEVONthink 4, and turn off Cellular Data.

Set Sync Options

Either before or after you set up locations and select databases, you can configure sync options, which are similar to those in the desktop versions of DEVONthink (refer back to Sync DEVONthink Databases):

1. If you're not already in the Settings window, go to the home screen of DEVONthink and then tap More ⊙ > Settings.
2. Tap Synchronization and set the following options as you prefer:
   - **Locations:** Select the locations to which DEVONthink To Go syncs; again, see Sync DEVONthink Databases for details.
   - **Bonjour:** Enable DEVONthink To Go to be found on your local network using Bonjour; see Set Bonjour Options.
   - **Conflict strategy:** Choose an option to choose what happens if a document changes both locally and remotely between syncs. If you choose Newest, the more recently changed document overwrites the older one. If you choose Duplicate, both copies sync in both directions—preventing data loss, but forcing you to manually sort out, later on, which version of each document you want.
   - **Schedule:** Choose Automatic (the default) to make DEVONthink watch for changes and sync new or changed documents automat-

ically (which does not necessarily mean "instantly"), an interval ranging from every minute to daily, or Manually to sync only when you tap More ⊙ > Sync or swipe down to initiate a sync.

- **Retain:** This slider is applicable only in cases where you've selected On-Demand Syncing. If it's set all the way to the right ("All items"), DEVONthink To Go keeps local copies of all downloaded files. If you want DEVONthink To Go to purge the contents of less-recently-used files (keeping only the metadata, so you can re-download the files as needed), move the slider to the left (to 100, 250, 500, or 1000 items). DEVONthink purges the contents of any older files over that number.
- **Download automatically:** Turn this on to download any files that are not already stored locally when you open them.

3. Tap the close ⊗ icon to close the Settings window.

Your new sync options apply immediately.

On-Demand Syncing

You have the option to sync only the metadata for your files rather than all their contents (saving a great deal of storage space and making syncing go much more quickly). Once you've done this, when you select a document that hasn't yet been copied to your mobile device, you can tap a Download link to download a local copy immediately.

You may want to use on-demand syncing as a default setting for your location but override it for particular databases or groups that you want to sync all the time. (However, if an entire location is set to Always, you can't override that setting for individual databases or groups.) To change your on-demand sync settings:

- For a *location*, tap More ⊙ > Settings > Synchronization > Locations, and then tap More ⊙ > Edit next to a location name; next, choose Always or On Demand next to "Download files," and finally tap Save.
- For a *database* or *group* open the database or group, and at its top level, tap the Info ⓘ icon. Then tap Always to keep everything in that database or group synced or "On demand" otherwise.

Use Home Screen Widgets

As in the Mac version (see Widgets), DEVONthink To Go now supports adding Home Screen Widgets. On your home screen, swipe left to show the widgets, then touch and hold an empty spot to enter jiggle mode. Tap the paintbrush icon then Add Widget. Scroll down and tap DEVONthink (or search for it) and then add any of the seven available widgets.

Find Your Way Around

Like most iPhone/iPad apps, DEVONthink To Go has a predictable, hierarchical interface, which reconfigures itself depending on the size and orientation of your device's screen. You should be able to navigate it without much difficulty. However, I would like to bring a few less-than-obvious things to your attention.

The Home Screen and Sidebar

On an iPhone, the home screen (the top level of DEVONthink To Go) is special—that's where you find your inboxes, tags, Trash, smart groups, and databases; and it's also where you see the More icon that leads you to Add, Sync, Activity, and Settings. If that's where you want to be, tap whatever text is in the upper-left corner of the screen until you get there.

On iPads, DEVONthink To Go uses a three-column view, similar to the one in Apple Mail. The sidebar—the leftmost column—contains the controls that are on DEVONthink To Go's home screen in iOS, including the More menu. (If you don't see the sidebar, tap the Sidebar icon in the upper-left corner to display it.) Next to that is a folder list, and to its right is a portion of a selected document.

Note: DEVONthink To Go offers unified inboxes and tags, as in the Mac version. These are enabled by default, but if you prefer to see the individual inbox and tags for each database on the home screen, tap More > Settings > Interface & Chat and turn off "Unify inboxes" and/or "Unify tags."

The Toolbar

On the bottom of the screen (on an iPhone) or the bottom of the sidebar (on an iPad) is the toolbar (**Figure 93**). It's always visible, although the selection of icons varies depending on where you are in the app.

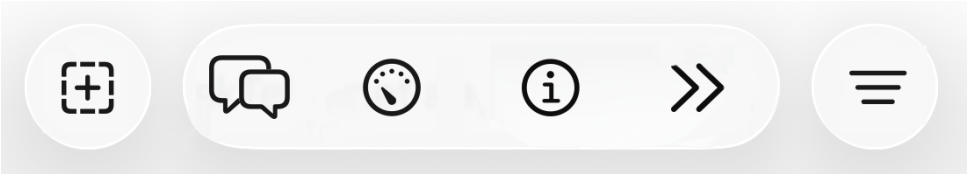

Figure 93: The toolbar as it appears (in one context) on an iPhone.

Here's a partial list of the icons you may see:

- **Add :** Displays a pop-up menu from which you can add text documents, groups, tags, and other elements
- **Chat :** Opens the chat assistant, which behaves much like the one in the desktop version of DEVONthink (see Chat with AI)
- **More :** Displays a pop-up menu with a wide variety of actions you can perform with the selected item(s), such as Copy, Move, Replace, Search, and Convert; an Organize submenu includes Group, Duplicate, Replicate, and Move
- **Activity :** Shows whether, and to what extent, syncing or other background activity is in progress

Note: A triangle appears on this icon when log entries are present.

- **Info :** Displays the Info inspector (see Info Inspector)
- **Options :** Adjusts background, view, and search options

- **Sort** : Lets you change the sort order as well as adjusting view and filter options

Note: Depending on your screen size and orientation, some of the above icons may appear on the document toolbar at the top of the screen rather than on the main toolbar at the bottom.

List Views

In other list views (that is, the top level of a database, or the contents of any group), tap the Sort icon to display options for sorting the list (by name, kind, date, URL, rating, label, or size—ascending or descending), filtering it (displaying only items with certain metadata characteristics), displaying summaries in various formats, always opening groups in icon view (instead of list view), and toggling the display of thumbnails, details, and hidden items.

Tap Edit to reveal controls you can use to select one or more items. (You can also tap Select All at the top to select everything, or Deselect All to deselect everything.) Having selected them, you can tap the More icon to organize (group/ungroup, move, replicate, duplicate), convert, or trash them; or tap the Share icon to display the share sheet. (Note that the item(s) must be downloaded to your device before you can share it, duplicate it, or move it to another database.)

Tip: You can select multiple items at once by swiping up or down over the selection circles on the left side of an item list.

Multiple Windows on iPad

DEVONthink To Go supports multiple windows on iPads, even if you're not using iPadOS 26 with its advanced windowing controls. You can create a new window by touching and holding an item name, then tapping Open in New Window on the context menu. (Note that if DEVONthink To Go is already in full-screen view, the new window will be hidden initially; swipe up fro the bottom and tap the DEVONthink To Go icon in the Dock to see all the windows.)

If you have both DEVONthink To Go and the Files app showing on the screen at the same time, you can also drag a group from DEVONthink To Go into the Files app to copy it as a folder.

Searching

To search for a document in DEVONthink To Go, tap Search (or More > Search, if the Search icon is not visible). Enter the text you're searching for. As you type, DEVONthink To Go immediately begins displaying matches from the titles of documents and groups; if you want to search contents as well, tap Search.

To perform an advanced search, first tap the small More icon in the search field before typing any text, then choose Advanced Search.

> **Note:** Just as in the desktop versions of DEVONthink, you can use parentheses, quotation marks (to search for a phrase), Boolean operators (`AND`, `OR`, and `NOT`), and the word `NEAR` when constructing your searches. You can also add an asterisk `*` at the end of a partial word as a wildcard to find matches that begin with the characters you entered. (The asterisk is implied for partial matches while typing, but must be entered explicitly to aid in matching after you tap Search.)

You can also search within the text of an open PDF, text, formatted note, or RTF document by tapping the Search icon.

Context Menus

DEVONthink uses contextual menus (or "context menus," in DEVONthink's terminology) to give you quick access to commonly used commands. To display one of these menus, touch and hold any document, group, database, or search result. As the name suggests, these menus have different contents depending on what is selected; **Figure 94** shows an example with a PDF selected on an iPhone (iPad appearance is slightly different).

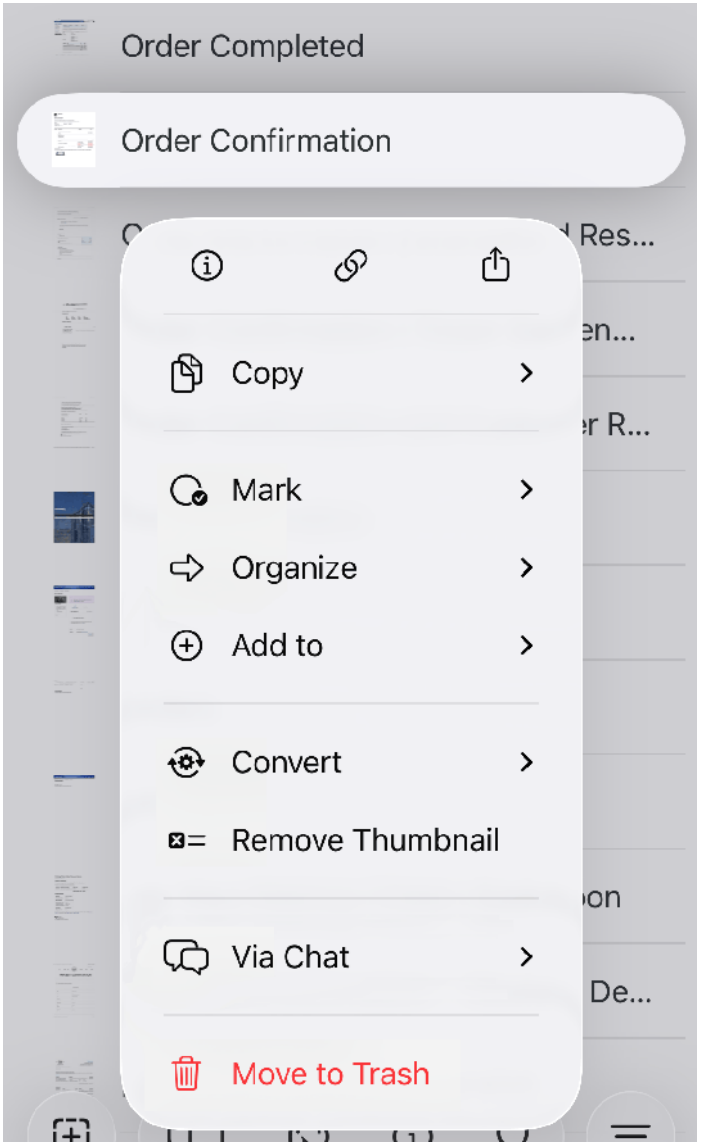

Figure 94: A partial context menu as it appears with a PDF selected.

Zen Mode

When viewing or editing a document, you can activate Zen Mode, which hides all toolbars and other icons. To do this, tap More ⊙ and choose Enter Zen mode. To display tools temporarily, tap at the top of the screen; tap again to hide them. To exit Zen mode, double-tap at the top of the screen.

Control Center Widgets

DEVONthink offers several widgets you can add to Control Center (swipe left on the Home screen, touch and hold to enter jiggle mode,

tap the paintbrush icon, choose Add Widget, and scroll down to DEVONthink). Your options are:

- Unread Articles
- Recent Feeds
- Inbox Items
- Favorites
- On the Reading List
- Reading List
- Recently Viewed

Add Items to DEVONthink To Go

In addition to items you've synced from another device, you can add many kinds of items to DEVONthink To Go right on your iPhone or iPad. The two most common approaches are creating a new document (or group, or other item) within DEVONthink To Go (discussed next) and adding content from other apps using the Clip to DEVONthink extension (see Use the DEVONthink Extension).

Create and Edit Content

To create a new document or other item in DEVONthink To Go, navigate to the location where you want the document to be stored and tap the Add icon. A panel appears, which may show just a list of item types (on smaller screens) or item types plus an editing area (on larger screens). Select an item type from the list of choices, and then use the editing view to fill in the details. Your choices include:

- **Text:** Create a document in plain text, rich text, Markdown, or formatted note formats. Fill in the title and body of the document, and optionally apply metadata (see Apply Metadata, ahead, for details).

- **Bookmark:** Enter a name and URL for the bookmark, and optionally apply metadata.
- **Sheet:** After tapping Sheet, add one or more field headings. DEVONthink To Go creates a new, empty sheet; tap Edit to open it and add more data. You can then double-tap a cell to change its contents, or use the controls at the top to select, add, and delete columns and rows, among other actions.

> **Note:** The current version of DEVONthink To Go provides no way to change column types or formatting, which you can in the desktop versions of DEVONthink (see Sheet).

- **Group:** Type a group name and optionally apply metadata.
- **Smart Group:** Type a smart group name, fill in the criteria you want, and tap Save.
- **Tag:** Type a tag name. (Normally, you create tags in the process of applying them to existing items, but if for some reason you need to create a standalone tag, this is how you do it.)
- **Scan:** Use the camera on your iPhone or iPad to scan a document.
- **Media:** Tap New Photo (to take a photo), Existing Photo (to add a photo already in your Photos library), Video Note (to record a new video), or Voice Note (to record audio).
- **From Template:** DEVONthink To Go offers templates for creating new documents as plain text, rich text, Markdown, and formatted notes. (It's not yet as fully featured as the Template feature in the Mac version, but it's a start.) Tap From Template > Default templates for built-in choices, or tap Manage to add new templates.

After filling in the required information, tap Done.

You can also edit plain text, rich text, formatted note, and Markdown files, plus (to a limited extent) graphics—whether or not you created them in DEVONthink To Go. To do so, select the document and either tap in the document body or tap Edit at the top of the screen. When you're finished making changes, tap Done.

It's All About Location

When you create any new document in DEVONthink To Go, the document can automatically record your geographic location—where you were when you created it—as metadata. (For this to work, you must have agreed to let DEVONthink To Go know your location when it prompted you to do so—if you're unsure, open Settings, tap Apps > DEVONthink > Location, and make sure While Using the App is checked. If you don't see that setting there, you may need to wait until DEVONthink prompts you again for location permission.) You can later see this location data by opening a document, tapping the More icon followed by Info, and looking in the Geolocation field.

Use the DEVONthink Extension

On an iPhone or iPad, DEVONthink includes a systemwide extension that can add an icon to the share sheet in nearly any app. By tapping that icon, you can capture information from elsewhere on your device and add it to DEVONthink.

Before you use the DEVONthink extension, you should make it more easily accessible—this step is optional (but a good idea):

1. Open a document or webpage in any app that supports share sheets (such as Safari).
2. Tap Share (which may be found on the More menu), swipe the row of app icons to the left, and tap More.
3. Enable the extension: Tap Edit. Then scroll down until you find DEVONthink 4. Make sure its switch is turned on, and tap the plus icon to add it to the Favorites list at the top. Tap the blue checkmark icon.
4. Use the handle on the right to drag it closer to the top (which means it will appear closer to the left in the list of icons in the future).
5. Tap Done.

Once you've done this, you can use almost the same procedure to capture information:

1. While viewing content you want to capture in to DEVONthink To Go, tap the Share icon.
2. Tap the DEVONthink 4 icon. (If you did not add DEVONthink to your Favorites list, you can instead swipe to the left, tap More, scroll in the list until you find DEVONthink 4, and tap it.)
3. On the panel that appears, you can optionally edit the document's name and metadata. The Location line indicates which database the item will be stored in; to pick a different one, tap the database name and then select a different database or Global Inbox.
4. Tap whatever is shown next to Format to choose the format in which you want to capture the document—Plain Text, Rich Text, Bookmark, Formatted Note, HTML Page, Markdown Text, Web Archive, PDF (One Page), or PDF (Paginated)).
5. Tap the blue checkmark icon.

The extension puts the document in the inbox of the selected database (or in your global Inbox).

Add Items via Shortcuts

As I mentioned earlier in Use Shortcuts, DEVONthink To Go now has fairly substantial Shortcuts support. Among the available actions are Add Note, Create Item, and New Scan, making it possible to automate the addition of items to DEVONthink To Go via Shortcuts.

Manage Documents

Once you have documents in DEVONthink To Go—whether you synced them from your Mac or added them manually on your iPhone or iPad—you can do quite a few things with them. Here are some of the most useful examples.

Generative AI in DEVONthink To Go

DEVONthink To Go offers most of the same generative AI capabilities as the desktop version of DEVONthink (see About DEVONthink and AI and Use Generative AI Features). Configure API keys and other AI-related settings by going to More > Settings > AI. Once you've done that, you can access "chat" features in these places:

- Tap the Chat icon on the toolbar to open the Chat Assistant.
- Tap the More icon on the toolbar, tap Via Chat on the pop-up menu, and choose Add Tags, Set Rating, Set Label, Rename, or Summarize.

Organize Files and Groups

With a single document or group open—or with one or more items selected in a list view in Edit mode—tap the Organize icon to display a pop-up menu (**Figure 95**) with the organizational options and numerous other commands. (Not all options apply to every item.)

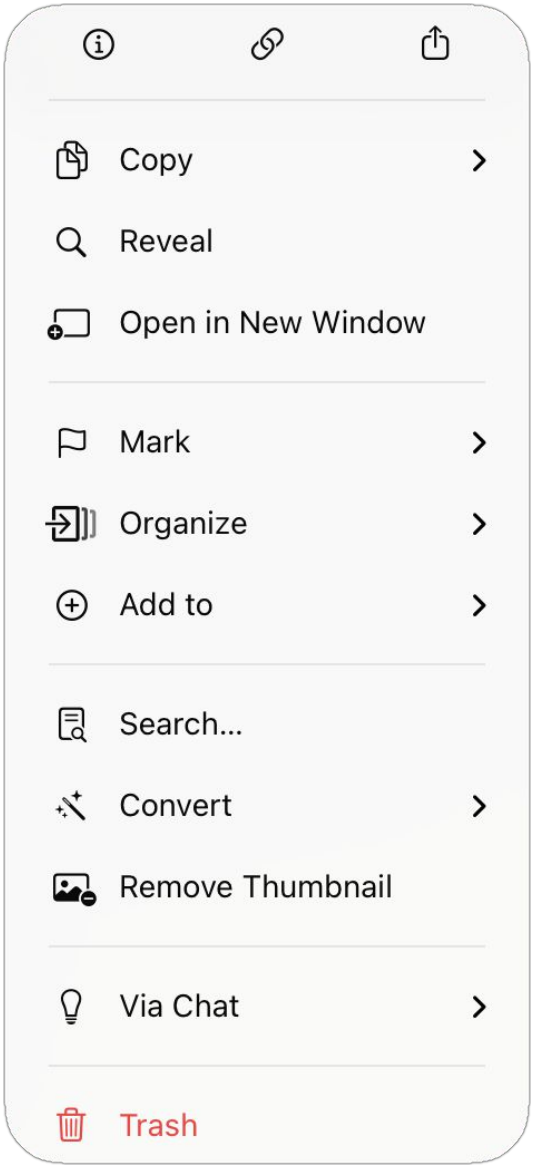

Figure 95: This pop-up menu displays whichever organizational commands are relevant to the selected item(s). Note that the order of commands is different between iPad (shown here) and iPhone.

Your choices for *organization* (a subset of the items on this menu) include:

- **Trash:** Move the item to the Trash.
- **Create Thumbnail** or **Remove Thumbnail:** Create or remove a thumbnail for the selected item.
- **Convert:** Tap the format you want to use. DEVONthink To Go makes a copy of the document in the same location, but with the new format. (If you were editing the document, the original version remains open.)

- **Add to**:
  - *Add to Templates:* Add this item to your Templates list.
  - *Add to Favorites:* Add this item to your Favorites list.
  - *Add to Reading List:* Add this item to your Reading list.
- **Organize:**
  - *Group:* Create a new group containing the selected item(s).
  - *Duplicate:* Navigate to the location where you want to copy the item and tap Duplicate.
  - *Replicate:* Navigate to the location where you want to create the replicant and tap Replicate.
  - *Move:* Navigate to the location where you want to move the item and tap Move.

Note: Move and Duplicate require the documents to reside locally on your device.

Tip: In any list view, you can swipe left on an item's name to reveal buttons for Trash and Flag—this is much like the comparable gestures in Mail for iPhone/iPad.

Use Icon View to Organize Documents

While in any list view on an iPad or a larger-screen iPhone, you can touch and hold a group name and choose Open as Icons to display the group's contents as a grid of thumbnails. You can then touch and hold an item and drag it to a new location.

Apply Metadata

Any document or group in DEVONthink To Go can have various kinds of metadata, just as in the desktop versions of DEVONthink. To apply this metadata to the currently open group or document, tap the More icon followed by Info.

On the panel that appears, you can specify or edit the following:

- **Name:** Tap to edit the document or group name.
- **URL:** If the item is a URL, this field holds the bookmark's location. For all other item types, you can optionally fill in any URL that's relevant to it. Tap in the URL field to type or paste the URL. To open the URL in your default browser, tap the browser icon.
- **Tags:** Tap the Tags icon, then type one or more tags. (After you type at least three characters, suggestions for matching tags may appear.) After typing a tag, tap Return; this turns it into a token recipe.
- **Label:** Tap the Label icon and then use the selector that appears to apply a predefined label (such as To Do, Done, or Important). The Label icon then assumes the color of the corresponding label: .
- **Flag:** Tap the Flag icon to flag the item. The icon then turns orange: . Tap it again to remove the flag.

> **Note:** For more on labels and flags, see the sidebar Using Labels and Flags.

- **Unread:** Tap the Read icon to mark the item as unread. The indicator then turns blue to show that it's unread; tap it again to mark it as read.
- **Lock:** To make the item read-only, tap the Lock icon, which then turns magenta: . Tap it again to unlock the item, making it editable. If you have a keyboard attached, you can also lock/unlock with ⌘-Control-K.
- **Rating:** Tap a star to set a rating.
- **Aliases:** Type alternative names for your document, which can be used in searching and WikiLinks. (See Words You Should Know.)

You can also use the switches to exclude the document from Chat, Search, or WikiLinking, or tap the info icon to add comments and

other annotations; change the author, date, or other custom fields; or view older versions of the document.

Annotate PDFs in DEVONthink To Go

As in the Mac version, you can annotate PDFs in DEVONthink To Go.

With a PDF open in DEVONthink To Go, tap Edit. A toolbar appears at the top or right with icons for various types of annotation actions (much like those in the desktop versions of DEVONthink). Depending on the width and orientation of your screen, you may see many icons or just a few; you can use the grab handle to move the toolbar to another position, which may enable it to show more icons. In any case, if not all icons are visible, those that are have a little arrow in the corner (), meaning you can touch and hold the icon to display a pop-up menu with additional options.

Among the tools you can find (even if buried on a menu) are:

- **Text Highlights:** Touch and hold Text Highlight and then tap an icon to select a tool with which you can add a background color, underline, wavy underline, or strikethrough to text that you drag over with your finger.
- **Annotations:** Touch and hold Text and then tap Text or Call-out.
- **Signature:** Tap Signature to draw your signature (which DEVONthink To Go can save for future use).
- **Note:** Tap the Note icon and then tap in the document to add a note.
- **Pen:** Tap the Pen icon to draw with a pen on the PDF.
- **Highlighter:** Tap the Highlighter icon to draw with a highlighter on the PDF.
- **Shapes:** Touch and hold Shapes and then tap an icon to select a tool with which you can draw arrows, lines, squares, circles, and other shapes.

- **Photo:** Tap Photo and then tap either Camera or Photo Library to insert a graphic on top of the PDF.
- **Erase:** Tap Erase to activate the eraser tool, with which you can wipe away annotations you made with the pen or highlighter.
- **Saved Annotations:** Tap Saved Annotations to see and reuse annotations you saved previously.
- **Select:** Tap Select to draw a selection rectangle, which selects any existing annotations.

In addition to all these tools, you can select text in a PDF to display the standard iOS/iPadOS pop-up menu with additional options.

Use Shortcuts with DEVONthink To Go

The Shortcuts app for iPhone and iPad offers powerful automation capabilities, and DEVONthink To Go can interact with Shortcuts in a variety of ways. The app adds 12 actions to Shortcuts, such as Create Item, Find Items, Get Content of Item, and Update Item Metadata, as well as a Focus filter.

For some ideas of how to put these actions to work, see this thread on the DEVONthink discussion forum or visit the MacStories Shortcuts Archive and search on that page for "DEVONthink." Examples of shortcuts provided there include DEVONmenu, which gives you an easy way to import a wide variety of files, and DEVONimage, which lets you save images from various places into DEVONthink To Go.

Configure DEVONthink To Go Settings

You can adjust the behavior of numerous DEVONthink To Go features. To do this, navigate to the home screen of DEVONthink To Go and tap More > Settings. There, you can change settings in the following categories:

- **License:** Sign in to your DEVONthink account, purchase a subscription, or connect to your DEVONthink 4 Pro or Server license.

- **Privacy:** Optionally require a passcode (possibly along with Face ID or Touch ID) to access your DEVONthink To Go data, and configure how long the app should wait before requiring it.
- **Notifications:** Choose Everything to see all notifications, Warnings to see notifications of Warnings and Errors only, or Errors to see notifications of Errors only.
- **Sharing & Spotlight:** choose whether to make DEVONthink To Go's data available to Spotlight (off by default), and choose a default format for sharing: File, Link, or Markdown Link.
- **Synchronization:** See Set Sync Options for a description of these settings.
- **Interface & Chat:** Select which icons you want to appear on toolbars. In addition, configure these options:
  - *Keep groups on top:* Turn this on to sort all groups above individual documents within each item list.
  - *Color replicants & duplicates:* Turn this on to change a title's color to red if it's a replicant, blue if it's a duplicate, or violet if it's both.
  - *Labels:* Select colors for each of your labels.
  - *Unify inboxes:* Turn this on to show the inbox for each of your databases in the Inboxes section of the home screen. Turn it off to show each database's inbox separately.
  - *Unify tags:* Turn this on to display a Tags section on the home screen, with subcategories for the tags in each of your databases. Turn it off to show each database's tag group separately.
  - *Databases show:* Determine whether the item count in the database shows items in your inbox or only those that are unread.
  - *Chat text size*: Select a text size for the AI Chat popover.

  - *Return key sends message:* With this on, tap Return to submit the message as a chat prompt.

- **AI:** Just as in the desktop version of DEVONthink, choose a default engine and model, enter API keys, and configure other settings related to generative AI.
- **Data:** Add or edit your own custom metadata fields, which you can then fill in per document as needed.
- **Annotations:** Decide where to store document annotations and whether to move or rename them automatically.
- **Versioning:** Set options for versioning, just as in the Mac version (see Use Versioning).
- **OCR:** Adjust these OCR-related settings:
  - *Retain annotations:* If you run OCR on a document that already has annotations, they'll be preserved in the final file if this switch is on. Turn it off to discard any existing annotations.
  - *Automatically correct orientation:* By default, DEVONthink tries to figure out the page orientation and adjust it so that text is readable without rotating your device; turn this off to keep the original orientation.
  - *Move original to the trash:* If this is on when you use the Convert command to perform OCR on an image or PDF, the original file (which lacks a text layer) is moved to the trash once the new version with searchable text is created.
  - *Quality:* Use this slider to set image quality in the final file. Higher quality also means larger file sizes.
  - *Languages:* Turn on any language you want to consider when converting documents. For best results, enable only the languages you're very likely to encounter in your files. Tap the plus ⊕ icon to add a language you may want to use for OCR.

- **Documents:** The following options are available:
  - *Use dark background:* Turn this on to display documents with a dark background when the systemwide dark mode is enabled. Turn it off to leave document backgrounds unchanged, regardless of dark mode setting.
  - *Enter Zen mode on tap:* Turn this on to activate Zen mode by tapping anywhere while viewing or editing a document (see Zen Mode).
  - *Automatically mark as read:* When this is turned on, as it is by default, documents are marked as read as soon as you view them and move to a different document. When it's off, you must manually mark documents as read.
  - *Automatically download:* When you try to open a document not already stored on your device, it is automatically downloaded if it's under 16 MB.
  - *Remote images in emails:* Turn this on to automatically download any images that are stored on a server rather than embedded in the email message itself. Turn it off to leave those images out by default.
  - *PDF attachments of RTFs:* In the desktop version of DEVONthink, you can drag a PDF into a rich text document or formatted note as an attachment. You can display these attachments by turning on this switch. You cannot, however, add PDF attachments to documents in DEVONthink To Go.
  - *Author:* In this field, type the default name to be used when setting a new document's Author metadata (typically, it's your own name).
- **Text:** Adjust plain text size, and turn on or off the following text editing features:
  - *Automatic caps:* Capitalize the first letter typed after a period and a space.

  - *Spelling correction:* Use the iPhone/iPad spelling correction feature as you type.
  - *Data detectors:* Look for, and highlight, text that might be dates, phone numbers, addresses, and so on for ease of adding the information to Contacts, Calendar, and the like.

- **PDF:** Toggle "Use dark background" (when off, DEVONthink leaves PDF backgrounds unchanged even when dark mode is enabled), "Show quick navigation" (turn on to show the quick navigation bar; turn off to hide it), or "Open immediately for editing" (to open PDFs in editing mode rather than viewing mode). You can also adjust Fit (choose Automatic to adjust document width dynamically; choose Width to fill the full width of your screen), Pages (choose Automatic to let DEVONthink To Go display two PDF pages side-by-side if space permits; choose Single to view only a single page at a time), "First page single" (turn on to show the first page of a PDF as a single page), Scroll direction (choose Vertical or Horizontal), and Continuous scrolling (turn this on to scroll PDFs continuously; turn it off to scroll a full page at a time). And, you can turn JavaScript in PDFs on or off.

- **Markdown:** Optionally force line breaks in Markdown documents; toggle syntax highlighting and WYSIWYG images and links; choose a color theme for syntax highlighting; determine whether Markdown documents open immediately for editing; enable support for MathJAX, Mermaid, and Prism; and enter custom CSS for control over how Markdown text is rendered in previews.

- **Feeds:** Now that DEVONthink To Go supports RSS feeds, you can use these settings to control how they're displayed and updated. Most of these are similar to the settings in the Mac version (see Read RSS Feeds).

- **Web:** The "Open links" item has three options: Internally (the pages open in DEVONthink To Go), "In a Safari view," or "In your default browser" (which may be something other than Safari). You can also toggle three items: "Open universal links," enabled by default, allows universal links (which can point to either a webpage

or an app, if that app is installed) to open other apps on your device; and "Delete cookies on launch" and "Delete cache on launch" remove those items, respectively, from DEVONthink's cache when you open the app.

- **WikiLinks:** Show controls for creating WikiLinks. The settings closely resemble those for the Mac version, as described in Create a WikiLink.
- **Backup:** Tap Export to Files to save all the downloaded documents that form your DEVONthink database as a series of files and folders (which you can find in the Files app). You can also enable "Backup data to iCloud" to make a backup of your database that's accessible to the Files app.

In addition, there are a few system-level settings you can adjust in Settings > Apps > DEVONthink; there may be more or fewer options depending on your device and how you've used DEVONthink To Go so far:

- **Location:** To enable DEVONthink To Go to record the location where a document was created, make sure this is set to While Using the App. To keep DEVONthink To Go from knowing your location, set it to Never.
- **Local Network:** If you plan to use Bonjour to sync your iPhone or iPad directly with another Mac on your network, turn this switch on to allow local network access.
- **Camera:** Turn this on to let DEVONthink To Go access your camera for taking photos and scanning documents.
- **Apple Intelligence & Siri:** Toggle various settings related to these two features.
- **Search:** Use these switches to specify in what ways, if any, the iPhone/iPad systemwide search tools can interact with DEVONthink To Go and its data.
- **Notifications:** Configure the ways in which you would like DEVONthink To Go to be able to get your attention.

- **Background App Refresh:** Turn this on to enable DEVONthink To Go to perform certain tasks (such as syncing and indexing) even when the app isn't open. This capability is entirely controlled by iOS/iPadOS, however—it's not under DEVONthink's control.
- **Cellular Data:** For iPhones and iPads with cellular radios, turn this off if you want to prevent DEVONthink To Go from syncing over a cellular connection.
- **Paste from Other Apps:** When you try to paste data into DEVONthink To Go that was copied from another app, select whether you should be prompted for approval (Ask, the default), be blocked from pasting (Deny), or be able to paste without any restrictions (Allow).
- **Language:** Choose DEVONthink To Go's default language here. Unless you specify otherwise, it uses the language set in Settings > General > Language & Region > *Device* Language.

Get Information Out of DEVONthink

Ordinarily, you interact with the data in your DEVONthink database using DEVONthink itself. However, in some cases you may want to copy or move documents out of DEVONthink to send to other people or use in other apps. DEVONthink lets you copy, share, or export static information from DEVONthink in a dizzying array of formats to suit almost any need. (If you want to give other people on your local network *live* access to your database, see the next chapter, Use DEVONthink's Web Server.)

Tip: If you're setting up a DEVONthink-based web server in order to share your data with others, read the sidebar Choosing a Sharing Strategy, earlier, to make sure you are aware of your sharing options, just in case one of the others is a better match for your needs.

Copy Data

The simplest way to get a document out of DEVONthink is to drag it to your desktop (or any other convenient folder). You can also drag documents into other appropriate places—for example, you can drag a document into a Mail message to add it as an attachment, drag a graphic into Photos to import it, or drag a text file onto the BBEdit Dock icon to open it for editing in BBEdit.

Another option is to select one or more documents and choose Edit > Copy (⌘-C), then switch to the Finder or another app and choose Edit > Paste (⌘-V).

Note: Although some metadata is preserved when you copy it from the app (for example, DEVONthink tags become Finder tags), metadata that's exclusive to DEVONthink (such as star ratings and custom metadata) isn't included unless you use File > Export > Files and Folders and then import that data into another DEVONthink database.

Share Data

If you want to send one or more documents to another person, or to another app on your Mac, select the document(s), click the Share icon, and choose a destination from the pop-up menu.

This menu is the same as the one that appears in other Mac apps that support Share extensions. (See Use the Share Extension for more about DEVONthink's Share extension.)

Export Data

If neither copying nor the Share feature meets your needs, you can export your data in many formats. You might do this, for example, to save documents in a different format (exporting can convert file formats at the same time), or to create a standalone website from a portion of your database.

All the export commands live on the File > Export submenu, and there are lots of them! (However, not every document format can be exported in every other format—for example, you can't export a graphic as a text file.) Here are your options:

- **Document:** Saves the selected item in its original format, with the option to add tags in the process.
- **Files and Folders:** Saves selected items in their original formats, preserving any group hierarchy as folders. It's safest to store exported files and folders in a new folder, rather than intermixing them with existing documents.

Note: The next 11 commands combine all selected documents into a single file in the selected format. With Rich Text (RTF and RTFD), Text, and Word formats, you can optionally select the "Include names of documents" checkbox in the Save dialog to include individual document names in the file.

- **as HTML Bookmarks:** Exports the URLs of selected items and sub-items as an HTML bookmarks file.
- **as LaTeX Document:** Exports Markdown documents (only) as LaTeX (`.tex`) files.
- **as OPML:** Exports the selected groups and documents as an Outline Processor Markup Language (OPML) file, suitable for importing into most outliners.
- **as PDF Document:** Exports the selected documents as PDF.
- **as PDF Document (LaTeX):** Exports Markdown documents (only) as LaTeX-formatted PDFs. This feature depends on a third-party tool called MacTeX, which you can download and install for free.
- **as RTF Document:** Saves selected documents as a single rich text file, including styles but omitting graphics.
- **as RTFD Document:** Saves selected documents as a single RTFD package, including styles *and* any graphics.
- **as Text:** Saves selected documents as a single plain text file (that is, without styles); you can optionally specify the encoding using the Text Encoding pop-up menu.
- **as Unix mailbox:** Exports selected email messages, or email messages in selected groups or smart groups (applies only to documents in `.eml` or `.emlx` format) as a Unix `.mbox` file, which many email clients can import.
- **as Word 2007 Document (DOCX):** Saves selected documents as a Word 2007 (`.docx`) file, including styles but *not* including any graphics.

- **as Word 97 Document (DOC):** Saves selected documents as a Word 97 (`.doc`) file—again, including styles but *not* including any graphics.
- **as Website:** Saves the selected items as a set of HTML file(s) and linked media, in the process converting non-web-friendly file formats to PDF.

  "Website" in this context means a collection of files and folders; by default, DEVONthink doesn't create an index page. If you want such a page (with links to each of the other documents), click Options in the Save dialog and then select Create Index Pages. This export option can be useful if you have a collection of, for example, rich text documents with embedded graphics and you want to convert it to a format that displays in a webpage (which requires that graphics be stored as separate files).
- **as Template:** Saves the current (single) document as a template in `~/Library/Application Support/DEVONthink/Templates.noindex`, adding it to the Data > New from Template submenu (for more information, see Template).
- **Database Archive:** Saves a copy of the entire selected database, compressed as a Zip file; see Back Up and Restore from Backup.
- **Metadata (JSON):** Exports the metadata of the selected items in JSON format.

Use DEVONthink's Web Server

The Server version of DEVONthink has a built-in web server that lets you share your database live on a network. This is useful for giving yourself (or other family members) access to your data from other computers in your home, or for running an internal website that provides shared information for all the employees of a small business. It also makes it possible to add new information to your database from a web browser.

I want to emphasize, though, that this is not a full-blown database server, and it's not suitable for running a public website. Compared to standalone servers, DEVONthink lacks many standard logging, performance, and customization features. So it's good at what it does—but just bear in mind that what it does is limited.

Note: By default, unless the Mac on which you're running DEVONthink has its own publicly routable IP address, your database is visible only inside your internal network. It's possible to work around this by using techniques such as port forwarding, but that's beyond the scope of this book. Consult your router's documentation.

To set up the web server, follow these steps:

1. Go to Settings > Server (**Figure 96**).

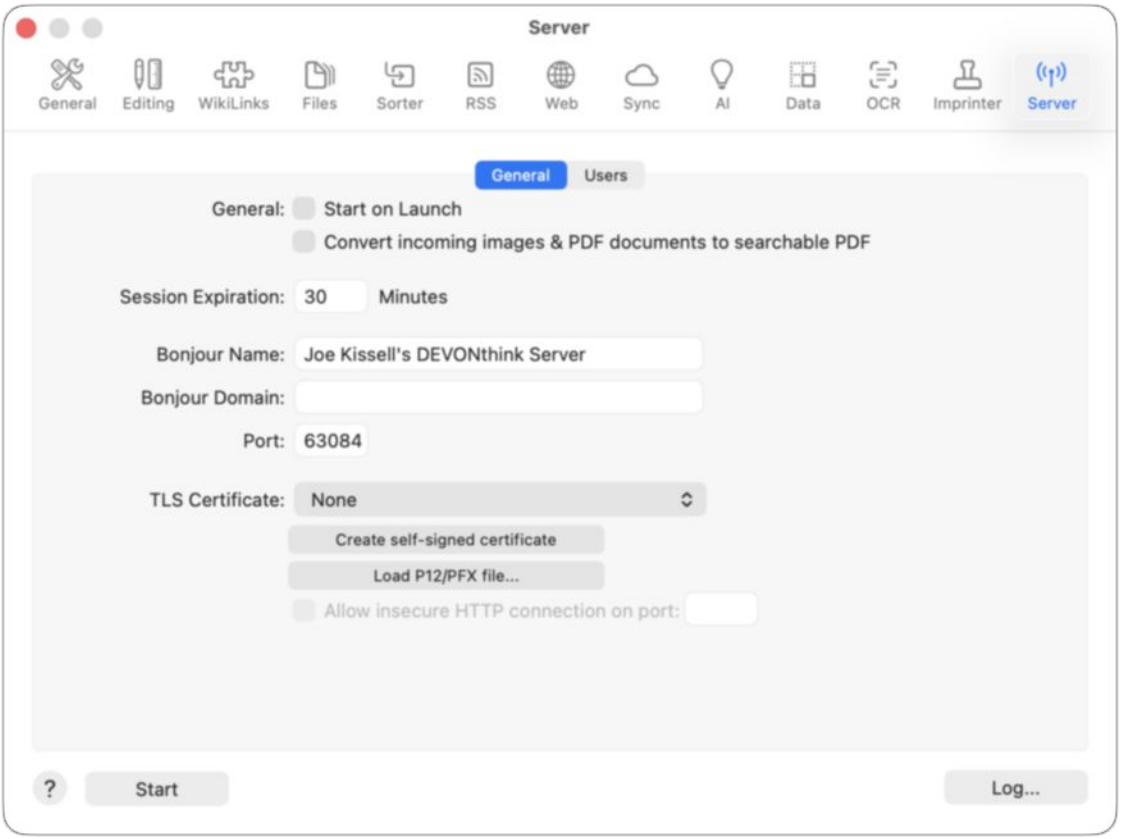

Figure 96: Set up DEVONthink's web server here.

On the General tab, edit any or all (or none) of the following fields to taste:

- **General:** Check Start on Launch if you want to activate the web server automatically when you open DEVONthink. Check "Convert incoming images & PDF documents to searchable PDF" if you want DEVONthink to perform OCR on all images and PDFs uploaded via the web interface.
- **Session Expiration:** Set a period of inactivity after which users are logged out automatically.
- **Bonjour Name:** Enter the name your DEVONthink web server will have on the local network.
- **Bonjour Domain:** If your local network contains more than one Bonjour domain (an unusual situation), enter the domain name at which your database will be reachable (to enable proper generation of relative links). Most people can ignore this setting.

- **Port:** Enter the number for the port on which the server should listen (if blank, DEVONthink chooses a random, high port number such as 63084).
- **TLS Certificate:** These controls enable DEVONthink to communicate via an encrypted HTTPS connection. If you already have a TLS certificate for your Mac installed (for example, one obtained from Let's Encrypt), you can choose it from the pop-up menu. If you don't have an externally managed certificate, however, click "Create self-signed certificate" to make your own and select it, all in one step. (Self-signed certificates are just as secure as those provided by certificate authorities, but visitors to your site may receive a warning that the connection may not be private because the certificate is not trusted.) If you have a P12 or PFX file rather than a TLS certificate, click "Load P12/PFX file," navigate to the file, and click Choose.
- **Allow insecure HTTP connection on port:** If, despite having HTTPS enabled, you want to enable insecure, HTTP connections, check this box.

2. On the Users tab, set up accounts and permissions for each person who will connect to DEVONthink via the web server. A guest user is included by default (and you can set up that user's settings to your liking), or you can add other users, as follows:

   a. Click the plus + button, type a name, and press Return.

   b. In the Password field, enter the password that user must type to log in. (A password is mandatory; if this field is left blank, the user will be unable to log in.)

   c. For each database (including the global Inbox), select the checkbox(es) for the activities that user is permitted to do via the web interface: Read, Download, Add, Write, Organize, and Delete.

Note: You can change users and permissions at any time, but if the server is running, you must stop it to make these changes and then restart it.

3. Click Start. (You can also choose Tools > Start Server, which is useful when the Settings window is closed.)

   The web server starts, and DEVONthink displays, at the bottom of the window, the address at which it can be reached—in both Bonjour format and as a numeric IP address (such as `http://iMac.local:60150`, `http://172.16.85.1:6015`).

The web server is now running. To turn it off later, click Stop, choose Tools > Stop Server, or quit the app.

To visit your database, open a web browser (on the same Mac, iPhone, or iPad, or another computer on your network), enter the address DEVONthink gave you in step 3, and enter the username and password for one of the users you set up in step 2. You should then see something like **Figure 97**.

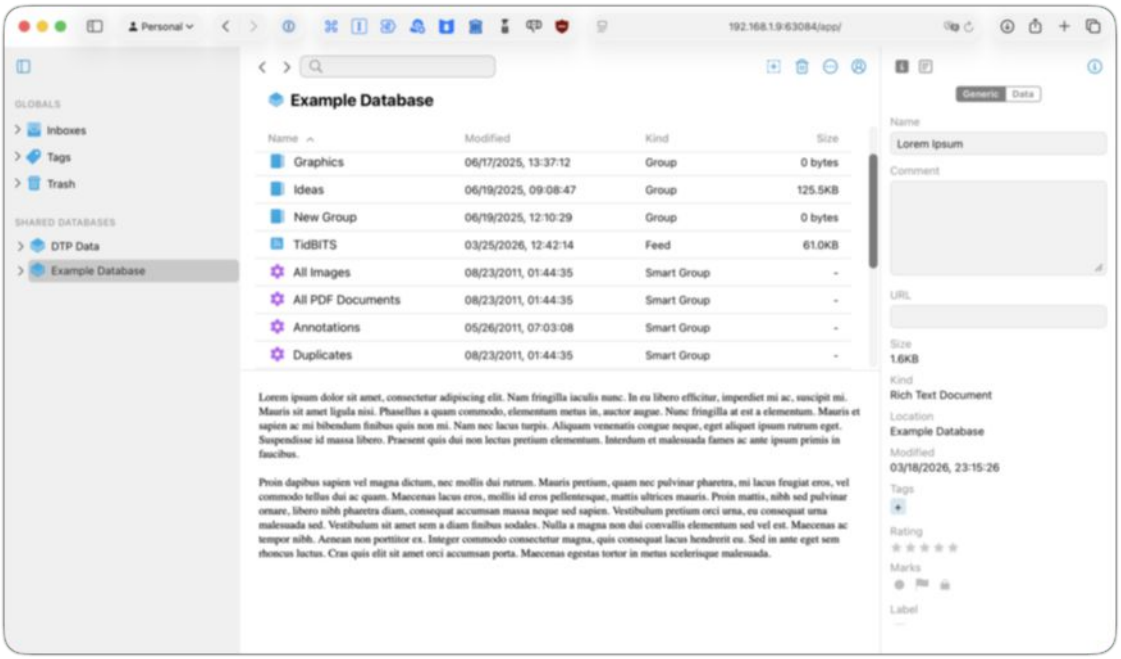

Figure 97: Your database looks something like this in a browser.

Because the controls available on this webpage are so simple and largely self-explanatory, I'll refrain from detailing each one. But I do want to point out just a few key features (which are dependent on the permissions of the currently logged-in web sharing user):

- **Uploading and downloading:** Remote users can add new documents to the database (tagging them in the process) and retrieve entire files in their original formats.
- **Creating and editing:** Remote users can use the More menu to add bookmarks, plain text notes, formatted notes, bookmarks, and Markdown documents to the database (again, including tags) from the browser, and can edit existing documents in those formats. Remote users can also add feeds and groups.
- **Search:** Use the full-featured Search field at the top of the window to search either the current database or all databases.
- **Organization:** You can move, copy via drag and drop, and rename documents. You can also use the Info inspector on the right to apply labels or star ratings, or to mark them as (un)flagged/(un)read/(un)locked.

In addition, the browser interface has a delete button and a User pop-up menu that lets you choose light or dark mode, change the language between English and German, or log out.

If you're wondering about another favorite feature, chances are it's simply not there—sorry! The web server is great for basic access, but it makes no attempt to replicate all of DEVONthink's functionality.

DEVONthink and Mobile Devices

If you connect to a DEVONthink web server with an iPhone or iPad, you may be pleasantly surprised to see that the page is optimized for the device's small screen. Even so, this method of getting at your database may be problematic if you need access when you're away from your local network, and the user interface is still somewhat cumbersome to work with. A much better solution for iPhones and iPads is to Use DEVONthink To Go.

Dig Deeper

Although I can't cover every last DEVONthink feature, I want to wrap up this book with a brief discussion of a few key features that are a bit more obscure or advanced than what the average user may need on a daily basis. I hope you'll use this information as a starting point to explore and experiment with the app on your own.

Maintain Your Databases

In certain situations, your DEVONthink databases can become corrupted. For example, if a system process DEVONthink depends on crashes while data is being written, the files may not be stored correctly or completely. Disk errors and other random events having nothing to do specifically with DEVONthink can also cause problems with your databases. If you begin noticing problems—weird error messages; missing documents, groups, or tags; or anything else that's out of whack—you can use any of several techniques to fix them. (And, it doesn't hurt to use these from time to time as a preventive measure, even if you haven't noticed any problems.)

Verify & Repair Database

The File > Verify & Repair Database command checks the selected database for errors, and if it finds any, it fixes those it can. Choosing this command is a quick and easy way to solve many common problems.

During the repair process, if DEVONthink finds any files in its package on disk that don't have corresponding entries in your database, it (re)imports them and puts them in a new group, at the top level of your database, called Orphaned Files. You can then move these newly adopted documents to the group(s) of your choice. DEVONthink also reports any missing files in Window > Log.

Optimize Database

Over time, as you add, delete, and modify items, your database can become less efficient in the way it stores your data, leading to decreasing performance. DEVONthink offers an easy way to reorganize your database's internal structure behind the scenes—it won't look any different afterward, but it may work better. (You needn't do this often, perhaps every few months if the app feels a bit less zippy than usual.)

To optimize a database, select it and choose File > Optimize Database. DEVONthink creates an extra backup of your database behind the scenes and then rebuilds its structure. Normally this takes just seconds, even with a huge database. To optimize *all* open databases at once, go to DEVONthink's Script > Data submenu and choose Verify & Optimize Databases (⌘-Control-Option-Y).

Back Up and Restore from Backup

You should, of course, back up your DEVONthink databases by including the `~/Databases` folder (or whatever folder you store them in) in your regular backups—for example, those you make using Time Machine, Carbon Copy Cloner, or Backblaze. (For extensive advice on backups, see my book *Take Control of Backing Up Your Mac*.) You can also Use Versioning to save older versions of individual documents. In addition, DEVONthink backs up its own data internally once a week (assuming you open it at least once a week).

If you're experiencing problems with DEVONthink that the Verify & Repair Database is unable to fix, you can try restoring DEVONthink's internal backup, *which affects only your metadata, not the documents themselves*. To do this, hold down Option and choose File > Restore Backup. Select a backup (DEVONthink stores two, and usually the most recent one is the logical choice), and click Open. DEVONthink reverts to the version of the metadata and index stored in that database. It doesn't hurt, after doing this, to choose Tools > Verify & Repair again, just in case your backup was also damaged. But keep in mind that if you've made further changes to your DEVONthink database

since that backup, they may not be reflected in DEVONthink after you restore your backup.

If you want to create an extra, manual backup of your full DEVONthink data (which you can then copy to the media of your choice), choose File > Export > Database Archive, select a location, and click Save. DEVONthink stores the backup as a Zip file.

Rebuild Database

If all else fails (namely, you still see error messages or weird behavior even after Verify & Repair and Restore from Backup), your best course of action may be to ditch your index and rebuild it from the raw documents. Doing so generally preserves your group and tag structure, although some metadata may be lost.

To rebuild your database, choose File > Rebuild Database and click OK. DEVONthink exports and then re-imports all your documents.

Link DEVONthink Documents to Other Apps

You can also access particular documents in your database *from another app on your Mac*. Select any item and choose Edit > Copy Item Link (⌘-Control-Option-C). This puts a specially formatted URL on your clipboard. Go to that URL from anywhere else on your Mac and it opens the selected item in DEVONthink.

Why would you want to do this? I'll give you a quick example. Calendar has a URL field for each event. If you put the link to a DEVONthink item in one of these fields, you can jump to that item—say, a report related to a meeting or a research document you need to present at a conference—directly from Calendar. (DEVONthink's included Reminders scripts do just this; see Included Scripts.)

In a PDF, you can also link to a particular *page*: if the Content inspector is open with Thumbnails selected, select a thumbnail, hold down Shift, and choose Edit > Copy Page Link (⌘-Control-Option-Shift-C).

In a rich text document, you can link to a particular paragraph by selecting text, right-clicking (or Control-clicking), and choosing Copy Paragraph Link from the contextual menu. In a video, you can link to a particular frame by clicking the gear icon in the video's control area and choosing Copy Frame Link from the pop-up menu.

Tip: DEVONthink also works with a terrific third-party app called Hookmark, which lets you link any document to one or more other documents, anywhere on your Mac. For complete details, see this Hookmark support page.

Appendix A: Keyboard Shortcuts

Many of DEVONthink's menu commands have corresponding keyboard shortcuts, and you can see those easily enough by looking at the menus. However, some keyboard shortcuts—particularly those involving a combination of keyboard and mouse—aren't apparent from looking at the screen. In addition, DEVONthink adds a number of menu commands to locations outside the DEVONthink app itself, and although you can see those on the relevant menus, you may not think to look for them. So, in this brief appendix, I've compiled a list of the most useful yet non-obvious DEVONthink keyboard (and keyboard-plus-mouse) shortcuts.

Keyboard-and-Mouse Combinations

The following shortcuts within DEVONthink occur with a combination of keyboard and mouse usage:

- **Duplicate to another location:** Option-drag.
- **Replicate to another location:** ⌘-Option-drag.
- **Create compound predicate (Smart Group or Advanced Search):** Option-click the plus button to the right of any criterion, which then becomes an ellipsis button.
- **Select a rectangular region of text in a PDF:** With the Text tool selected, Option-drag.
- **Display a contextual menu:** Right-click (or Control-click).
- **Resize all columns in Column view:** Option-drag any column divider.

- **Select multiple contiguous documents, groups, tags, etc.:** Shift-click.
- **Select multiple discontiguous documents, groups, tags, etc.:** ⌘-click.
- **Open a link in a new background tab:** ⌘-click.
- **Open a link in a new foreground tab:** ⌘-Shift-click.
- **Create a link from one DEVONthink document to another (rich text) document:** ⌘-Option-drag the first document into the desired spot in the second.

In addition, you may want to use these keyboard shortcuts in the Finder on occasion:

- To display the `~/Library` folder, hold down Option and choose Go > Library.
- To move items into DEVONthink (that is, import and then move the original to the Trash), hold down ⌘ while dragging the items to DEVONthink.
- To index (not import) items when dragging into DEVONthink (including to the Sorter and the systemwide global Inbox), hold down ⌘-Option while dragging the items.

Other Shortcuts

Several other miscellaneous shortcuts exist:

- **Sorter:** The commands Take Note, Copy Selection, Clip to DEVONthink, and Search have no keyboard shortcuts by default, but you can define hotkeys for them in Settings > Sorter.
- **Services menu:** DEVONthink optionally adds several commands to the systemwide Services menu, such as Take Plain Note and Summarize. Some of these may be disabled by default. You can enable them, change existing shortcuts, or add missing shortcuts; see Use the Services Menu.

Learn More

You can learn more about DEVONthink by consulting any of the following resources:

- DEVONthink User Handbooks: The official documentation from DEVONtechnologies (available in PDF and EPUB formats) covers other features that didn't fit into this book.
- DEVONtechnologies User Forum: Share your tips and experiences with other DEVONthink users, get problem-solving advice, and learn new ways to accomplish tasks in the User Forum.
- Devonian Times: To keep up with news about DEVONtechnologies, its products, and more, read Devonian Times, a blog by DEVONtechnologies employees (including the company president, Eric Böhnisch-Volkmann).

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About the Author and Publisher

Joe Kissell is the author of more than 75 books about technology. In 2017, he also became the publisher of Take Control Books, when alt concepts—the company he runs along with his wife, Morgen Jahnke—

acquired the Take Control imprint from TidBITS Publishing Inc.'s owners, Adam and Tonya Engst. Before he began writing full-time in 2003, Joe managed software development, a *totally normal* profession for someone with degrees in philosophy and linguistics.

In his hypothetical spare time, Joe likes to walk, cook, read, and teach tai chi. He lives in Saskatoon, Saskatchewan, Canada, with Morgen and their sons. To contact Joe about this book, send him email and *please* include `Take Control of DEVONthink 4` in the subject. While Joe is happy to receive feedback on this book, *he cannot offer any technical support for using DEVONthink*. You can also sign up for joeMail, his low-volume mailing list, follow him on Mastodon (@joekissell) or Bluesky (@joekissell.com), or visit his blog at JoeKissell.com.

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