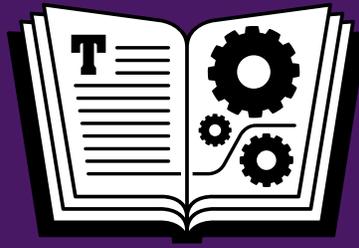


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# Table of Contents

Read Me First .....	3
Introduction .....	6
DEVONthink Quick Start .....	8
Quicker Start for Second Edition Readers .....	10
Understand DEVONthink Basics .....	11
Explore DEVONthink’s Interface .....	27
Set Up DEVONthink Databases .....	53
Get Information into DEVONthink .....	61
Organize Your Information .....	114
Find Your Information .....	138
Work with Your Information .....	148
Sync Your DEVONthink Databases .....	160
Use DEVONthink To Go .....	178
Get Information Out of DEVONthink .....	195
Dig Deeper .....	202
Appendix A: Keyboard Shortcuts .....	210
Learn More .....	213
About This Book .....	214
Copyright and Fine Print .....	217

# Read Me First

Welcome to *Take Control of Getting Started with DEVONthink 2, Third Edition*, version 3.0, published in November 2016 by TidBITS Publishing Inc. This book was written by Joe Kissell and edited by Tonya Engst, with significant help from Kelly Turner.

This book teaches you the basics of DEVONthink (Personal, Professional, and Pro Office editions) version 2 on the Mac and DEVONthink To Go in iOS. You'll learn how to find your way around, get information into and out of DEVONthink, and make the most of the program's most important features.

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## Sponsored by DEVONtechnologies

This book was sponsored by DEVONtechnologies. Special thanks to Eric Böhnisch-Volkman for his enthusiasm for the project and to Christian Grunenberg for his clarifications about subtle features.



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## Updates and More

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You can access extras related to this ebook on the Web (use the link in [Ebook Extras](#), near the end; it's available only to purchasers). On the ebook's Take Control Extras page, you can:

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## Basics

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To review background information that might help you understand this book better, such as finding System Preferences and working with files in the Finder, read Tonya Engst’s free ebook [Read Me First: A Take Control Crash Course](#), available for free on the Web or as a standalone ebook in PDF, EPUB, and the Kindle’s Mobipocket format.

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## What’s New in the Third Edition

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DEVONthink has been updated quite a few times since I wrote the second edition of this book (back when version 2.3.3 was current). Even though the software is still “DEVONthink 2” (that is, version 2.x), the latest version as I write this text—version 2.9.6—includes hundreds of (mostly minor) changes and bug fixes compared to what I described earlier, as well as some significant new features. In addition, since the second edition appeared, Apple released several major upgrades to the Mac operating system, each of which had its own long list of changes.

Accordingly, I’ve updated this book in many ways, both large and small.

**Tip:** If you already read the second edition of this book, take a glance at [Quicker Start for Second Edition Readers](#)!

Among the most significant changes are the following:

- Updated the page [Quicker Start for Second Edition Readers](#) to help readers of the previous edition find new information quickly

- Revised the sidebar [Where Not to Store Your Databases](#) to reflect the new sync capabilities, and to mention that iCloud Drive isn't a good place for your databases
- Added a number of newer options to [Create Documents in DEVONthink](#), including [Formatted Note](#), [HTML Page](#), and [Markdown Text](#)
- Thoroughly revised [Clip to DEVONthink Browser Extension](#) to describe its current behavior
- Added instructions to [Use the Share Extension](#) for getting data into DEVONthink
- Revised [Scan Documents](#) with up-to-date instructions for using ScanSnap Manager or ExactScan
- Added the topic [Convert Document Formats](#) about converting documents from one format to another
- Rewrote nearly all of the [Sync Your DEVONthink Databases](#) chapter, which now covers DEVONthink's new (and vastly improved) sync capability
- Rewrote the entire [Use DEVONthink To Go](#) chapter, which now covers the completely rewritten DEVONthink To Go version 2
- In the [Get Information Out of DEVONthink](#) chapter, significantly updated the topics [Use DEVONthink's Web Server](#) and [Export Data](#), and added the topic [Share Data](#)
- Revised much of [Use AppleScript and Automator with DEVONthink](#)
- Replaced all the graphics with up-to-date versions
- Modernized the look and feel of the book to reflect the latest Take Control style

# Introduction

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 is an information management tool with a marvelously deep, rich set of features, and it can adapt itself to just about any set of needs or work preferences. That's the good news; the bad news is that 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 program for the first time or are a seasoned user looking for ways to get more out of it, I hope to show you where to focus, what to try, and how to think about DEVONthink in the most effective way.

DEVONthink already has plenty of good documentation in the form of built-in help files (also available as a [stand-alone ebook](#)). The purpose of this book is neither to replace that information nor to explain the operation of every command and button. Rather than create an exhaustive reference, I concentrate on the key tasks you'll want to accomplish. (That's why we put "Getting Started with..." in the title!) After providing an overview of the program'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 within the program; and, finally, getting the 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 that goes a bit deeper into some of the program's advanced capabilities.

## 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 stepping stones that help you navigate both the book and the software more easily.

**Note:** DEVONthink comes in Personal, Professional, and Pro Office editions (see [DEVONthink Editions](#) for details). When I write "DEVONthink," I'm referring to features in all three; where appropriate, I mention which edition(s) are missing any features I discuss.

Since the second edition of this book was published, DEVONthink has had six major updates, and DEVONtechnologies is constantly working on improving the software. As a result, since the time I wrote this third edition (published when DEVONthink version 2.9.6 was current, and the new sync capability had only recently appeared), any number of things may have changed—new features may have been added, bugs fixed, interface elements rearranged, and so on.

Unfortunately, we can't update this book as frequently as the software, so you may occasionally encounter something in the book that doesn't quite match with what you see on your screen. I don't expect these small inconsistencies to cause you any problems, but I do recommend reading the release notes for each update of DEVONthink you install for details on what's new. And be sure to access the online [Ebook Extras](#) for this ebook in order to check the blog from time to time to see if I've added any new information.

# DEVONthink Quick Start

This book helps you find your way around DEVONthink and use its most important features effectively. Each chapter builds on the one before it, so I recommend reading the book sequentially. If you choose to jump around, please read at least the first two chapters—[Understand DEVONthink Basics](#) and [Explore DEVONthink’s Interface](#)—which will help you understand the rest of the material.

## ***Get your bearings:***

- If you’ve already spent time with the second edition of this ebook, read [Quicker Start for Second Edition Readers](#), ahead shortly.
- 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; 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, and use OCR with scanned documents; see [Work with Your Information](#).
- Store and manage your DEVONthink data on any iOS device; see [Use DEVONthink To Go](#).

### ***Share and sync your DEVONthink data:***

- If you want to share data with other people, consider your options in the sidebar [Choosing a Sharing Strategy](#).
- Keep multiple copies of DEVONthink in sync; see [Sync Your DEVONthink Databases](#).
- Share data over the Web or export it in numerous formats; see [Get Information Out of DEVONthink](#).

### ***Go beyond the basics:***

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

# Quicker Start for Second Edition Readers

Although much has changed in DEVONthink and macOS over the past couple of years, anyone who already read the second edition of this book should have a good grasp of the fundamentals and won't need to re-read this entire edition—or even all the items listed in [What's New in the Third Edition](#), a few pages back. It will, however, be a more valuable reference guide since it now more closely matches reality, so the next time you dip into a feature you haven't tried in a while, be sure to consult the relevant portion of the book.

If it's been a long time since you first read this book, or if you haven't paid careful attention to all the recent changes in DEVONthink and macOS, I want to draw your attention to two items in particular that are well worth a fresh look:

- Although DEVONthink previously offered a sync capability, it had a lot of problems. The syncing code has been replaced entirely with a modern, fast, and flexible system. See [Sync Your DEVONthink Databases](#).
- DEVONthink's iOS app, DEVONthink To Go, has also been rewritten from scratch and is now massively more useful. See [Use DEVONthink To Go](#).

# 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 other 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](#).

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## What Exactly Is DEVONthink?

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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 program 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 other 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 iTunes 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 iTunes and Photos). In addition, it stores *metadata*, extra pieces of information about each item (such as labels and modification date) in a special database, separate from the files themselves.

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

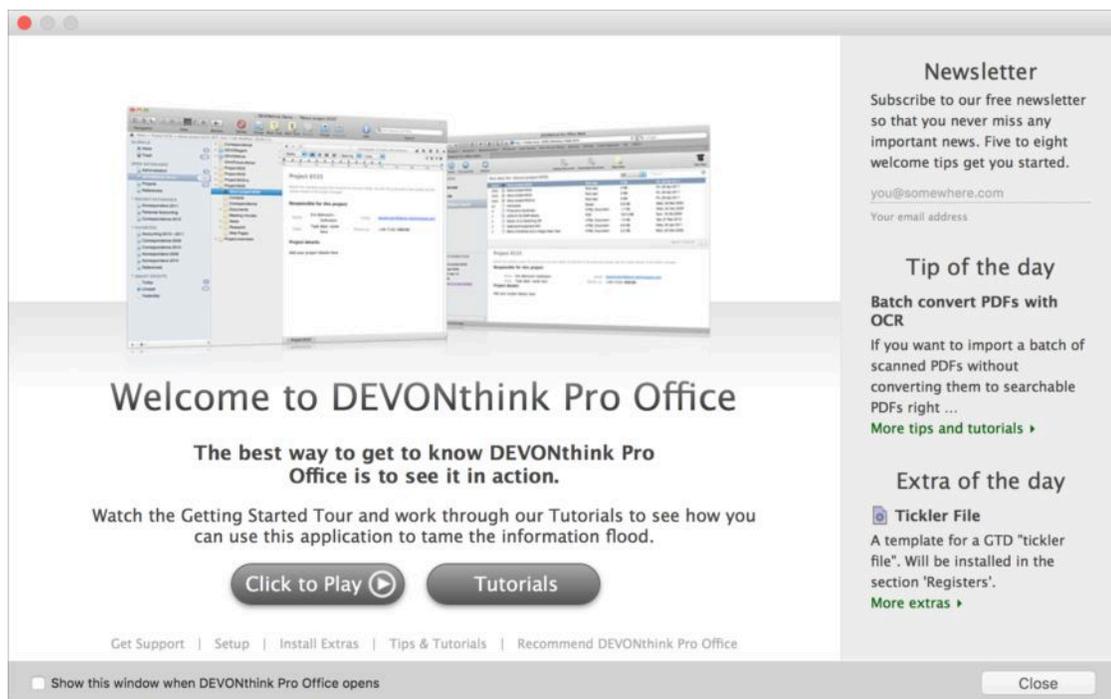
- **Snippet keeper:** In the course of a day, you may want to keep track of URLs, notes to yourself, parts of Web pages, screenshots, and countless other bits of information that don't necessarily fit the mold of stand-alone files. Any app that provides a convenient way to capture and store such a wide variety of data can be called a *snippet keeper*. Apps such as EagleFiler, Evernote, MacJournal, SOHO Notes, Tinderbox, Together, 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, another popular category of tool is the note taker. With apps such as Curio, NoteTaker, Microsoft OneNote, and Useful Fruit Software's Pear Note, you can not only type notes (as you could in any word processor or snippet keeper) but also record audio, highlight and annotate text, make outlines, and do similar sorts of note-taking tasks. DEVONthink, too, offers several ways to facilitate note-taking (although currently, only DEVONthink To Go supports audio recording; the desktop versions do not).
- **Database:** Database applications, such as FileMaker Pro, Panorama, 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 stand-alone databases, it does let you slice and dice some kinds of information in much the same way.

# 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 1**) to welcome you and offer tips, tutorials, support, and other help.



**Figure 1:** The Support Assistant welcomes you with tips and tutorials.

The Support Assistant window will appear 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 the Welcome screen of this window:

- **Intro screencast:** Click Click to Play to see a movie demonstrating some of DEVONthink’s key features.
- **Newsletter subscription:** To subscribe to a free periodic newsletter with DEVONthink tips, enter your email address under “Newsletter.” Then click the green 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, extend a trial license, update your email address, and purchase an upgrade. (As with the newsletter subscription, if your email address is incorrect, you can triple-click it and type a new one before clicking the green checkmark  icon.)
- **Extras:** Click the Install Extras link at the bottom of the window to display a screen with extra AppleScripts and templates (beyond those installed automatically, as discussed in [Included Scripts](#) and [Template](#)); you can install any of these with one click by clicking the Install button beneath it. (To remove an installed item, click Remove.)
- **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 top Welcome screen of the Support Assistant at any time, click the Welcome link at the bottom of the window.

# 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

---

DEVONthink Personal automatically creates its database (it supports only one) when you first launch it. DEVONthink Professional and DEVONthink Pro Office prompt you to create a database when you open them for the first time, and for many people that single database is sufficient. But if you want to create an additional database, the process is simple:

1. Choose File > New Database. A file dialog appears.
2. Enter a name for your database and choose a location (or accept the default location). If you're tempted to choose your Dropbox, any iCloud Drive location, or a local network server as your destination, please read the sidebar just ahead, [Where Not to Store Your Databases](#), first!
3. If you want to keep the information in your DEVONthink database from being indexed by Spotlight, uncheck Create Spotlight Index. Doing so doesn't prevent you from searching within DEVONthink, but it does prevent the contents of the database from appearing in system-wide Spotlight searches. (Choose this option if your database contains sensitive data and you're concerned that someone else with access to your Mac might stumble on it while using Spotlight.)
4. Click Create.

DEVONthink creates a new, empty database.

## Where Not to Store Your Databases

You can save your DEVONthink database(s) anywhere you like on an internal or external disk or SSD—somewhere inside your `~/Documents` folder is probably a good choice for most people. But you may be tempted to store your databases in certain locations where you probably shouldn't: Dropbox, iCloud Drive, and network servers. I hasten to point out that this isn't a *prohibition*, but I strongly recommend against these destinations. Here's why.

Because of the way DEVONthink stores data and the way Dropbox and iCloud Drive syncing work, if you should open the same database on two Macs (or a Mac and an iOS device) at the same time (or if you open it on a second device after closing it on the first one, but before the sync has completed), you can *lose data*. Dropbox and iCloud Drive will blindly overwrite older data with newer data, and have no way to sync individual data elements within your database. If you're *very* careful, you can avoid this—but in my opinion, the risk is too great to chance it. (But, take heart! You can still sync your data with other devices using Dropbox or iCloud Drive; you just have to set that up from within DEVONthink. See [Sync Locations](#), especially the sidebar [Syncing with Dropbox](#).)

So, what about a server on your local network, such as another Mac that uses the Mac's built-in file sharing? You face a similar danger, in that two Macs accessing a single database at the same time can cause data loss. You won't have to worry about syncing delays, but on the other hand, you may encounter slowdowns in saving your work as you use DEVONthink. A better solution, again, is to *sync* your local data to the server—see [Sync Locations](#).

# 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 iWork 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 program (see [Edit Documents in External Applications](#)).

**Note:** To prevent DEVONthink from importing certain kinds of files when you use File > Import or drag and drop (for example, you may want to keep all music out of DEVONthink, even if there happens to be a music file in a folder you import), choose Preferences > Import > Files and uncheck the relevant boxes in the Files section. Individual files you import manually override these settings.

---

## Decide Where Your Documents Will Go

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

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

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

When you create a new document from *within* DEVONthink—and that includes importing or indexing documents using the File > Import or File > Index command—it goes in the currently selected or open group or tag; if nothing is selected or open, it goes to the top 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 application *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.

# 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 Auto-Classify feature.

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:

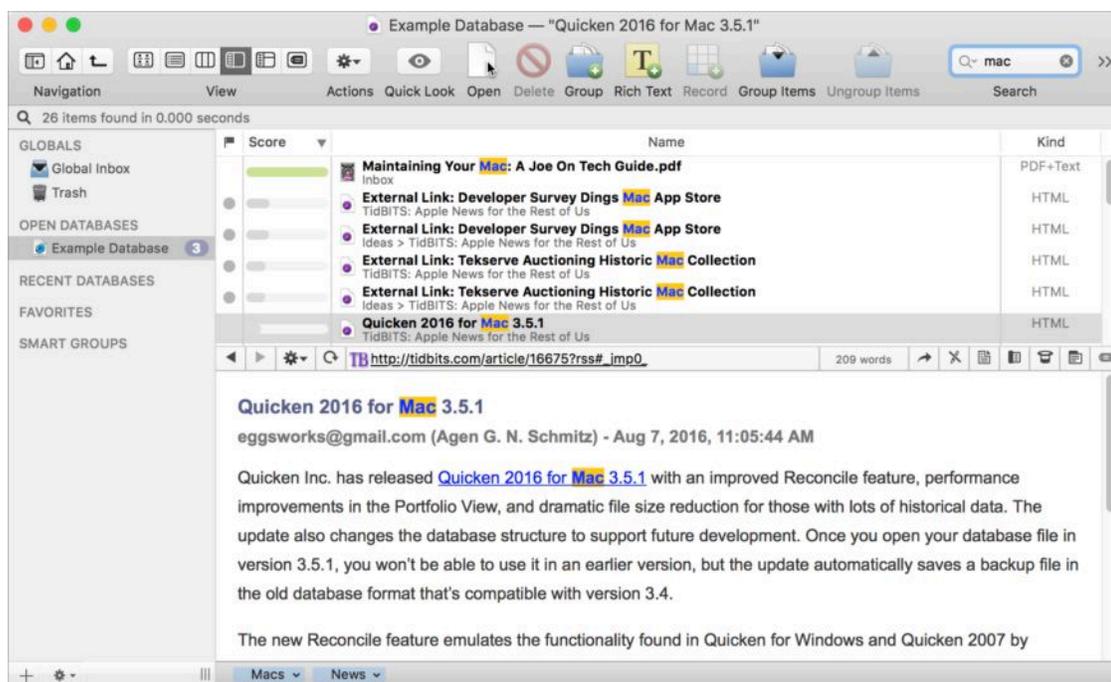
- Every tag is also a group—of sorts. All your tags are listed under Tags at the top level of your database (in what I'm calling the Tags list), and if you drag a document from outside DEVONthink to one of these tags (meaning it's not already in an inbox or some other group), the only place that document appears in your database 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 at the top level of your database and drag one tag onto another, thus making the first tag a “child” of the second one.

# 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 searching. This chapter describes the search options, 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.

## 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 48**).



**Figure 48:** Type a term in the search box at the upper right for a super-fast search.

Results are ranked by relevance, and each item has a colored bar that graphically indicates its score. Any occurrences of your search term are

highlighted in the results list, as well as in the documents themselves, (partial-word matches aren't highlighted, however).

### Search Syntax

Searches in DEVONthink are always 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`). Complete details about these options and more can be found in DEVONthink's help.

---

## Refine a Search with Search Options

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If a simple search doesn't return the results you're looking for (or returns far too many results), you can click the triangle 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, too (even if you quit and reopen DEVONthink), until you change it, so you may wish to reset it right after use to avoid future confusion.

The first group of options, under the “Search for” label, affect where in each document DEVONthink searches:

- **All:** Searches everywhere—document contents and all metadata
- **Content:** Searches only document contents
- **Name:** Searches only document names
- **URL:** Searches only the URL (if any) associated with a document
- **Comment:** Searches only the contents of the Spotlight Comments field (accessible in the Info Panel)
- **Metadata:** Searches only metadata, including URLs and Comments

# 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 program. And when you need to do editing that goes beyond DEVONthink's capabilities, you can easily open a document in the external application of your choice. I discuss all these options in the next several pages.

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## Edit Documents in DEVONthink

---

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

Because DEVONthink uses the Mac's Quick Look technology, it can index and display any kind of media the Finder can—including graphics, audio, and video files, iWork and Microsoft Office documents, and others for which Apple or a third party has installed an appropriate plugin. However, although some of these files can be manipulated inside DEVONthink, others cannot. The bulleted list just ahead gives an overview of what you can and can't do in various kinds of documents.

Just as when viewing documents, you can edit a document directly in an edit pane (for views that have them), 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 and display an unlocked  icon. If you see a read-only  icon on the navigation bar, you must choose View > Text Alternative (Command-Option-P) or click the Text  button to switch to text-only mode in order to edit the document (as explained in the sidebar just ahead).

Of course, you can't select, edit, highlight, or annotate text in video or audio files. Apart from that, here are the types of editing you can do in which types of documents:

- **Select text:** All document types except graphics (email messages must be in text-only mode—see the sidebar below)
- **Edit:** Plain text, rich text, graphics, HTML (text-only mode), RSS articles (text-only mode); Word documents (.doc only, in text-only mode)
- **Highlight:** Rich text, Web archives, and PDF only
- **Annotate:** PDF only

### Preview Mode and Text-only Mode

As noted above, certain capabilities are available only in text-only mode. (Oh no! Yet another way of viewing documents! Yeah, sorry.)

DEVONthink can present the contents of certain documents either in its normal, WYSIWYG form (preview mode) or in a form that shows only the underlying text (text-only mode). You toggle between these views by choosing View > Text Alternative (Command-Option-P) or clicking a button on the navigation bar, which has one appearance in preview mode  and another in text-only mode . What you get in text-only mode depends on the document type—for example:

- ✦ **HTML and Web archives:** HTML source
- ✦ **Pages documents:** Plain, unstyled text
- ✦ **Word documents:** Styled text, but no page formatting; only approximate paragraph formatting; and ugly, inscrutable codes for things like hyperlinks

With those preliminaries out of the way, let's look at a few of the most common document types you may want to edit.

# Sync Your DEVONthink Databases

If you have more than one Mac—or a Mac and one or more iOS devices—you’ll probably want to use DEVONthink on each one, and that in turn almost certainly means you’ll want your data to stay in sync across your devices. We’ve all become accustomed to near-instant syncing of data such as email, contacts, and calendars. In addition, cloud services like Dropbox and iCloud Drive enable us to keep files and folders in sync everywhere. You can now have that same experience with your DEVONthink data.

In the previous edition of this book, I described the sync capabilities DEVONthink had at that time. To put it generously, they were pretty weak (as in hard to configure, slow, and unreliable). But I’m delighted to say that DEVONtechnologies has rewritten DEVONthink’s sync engine from the ground up, and in my testing over the past few months, I’ve found it to be both speedy and dependable—a far cry from the earlier implementation. To use the new sync engine, you must have DEVONthink 2.9 or later installed.

If you were syncing using the old DEVONthink method, you’re in for a treat. Yes, you’ll have to set up everything from scratch again, but it’s easier to do so now, and the result is quite satisfying. 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.

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## Understand Sync Basics

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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](#) or by storing your database in Dropbox or a folder synced by a similar service). Making even a small change to a single document changes not only the corresponding document file but also various parts of the database. As a result, if the data is synced externally while the database is open in more than one place, errors and data loss could occur.

However, using DEVONthink itself to perform the syncing is another story altogether. DEVONthink can sync any or all of your databases with any number of other Macs and iOS devices, and it's safe to make changes with the database open on more than one device—DEVONthink knows how to merge your changes quickly and intelligently.

### Sync Locations

Any database can sync to one or more locations (or none); you can choose whichever combination best meets your needs. Conceptually, the various destination choices fall into two categories—*direct* (a database syncs between two copies of DEVONthink running on different devices) and *indirect* (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).

# Use DEVONthink To Go

If you have an iPhone, iPad, or iPod touch, you can take your DEVONthink data with you and work with it when you're away from your Mac. To do this, you'll need an iOS app called [DEVONthink To Go](#), which costs \$14.99. (An optional in-app purchase for \$4.99 adds Pro features, including metadata-only syncing, support for viewing email messages and `.csv` or `.tsv` documents, and annotating PDFs.)

To be clear, I'm talking here about DEVONthink To Go *version 2*, which was released in August 2016. Version 1, covered in the previous edition of this book, was much more limited in its capabilities; it was also slow to sync and generally cumbersome to use. But version 2, which was rewritten from scratch, is *far* better—it's fast and capable, and I find it a real joy to use.

Although even DEVONthink To Go 2 doesn't have all the features that the desktop versions of DEVONthink do, it does have a surprisingly rich range of capabilities for viewing, creating, capturing, and managing information directly on your iOS device.

If you have no iOS device, or if you're not interested in taking your DEVONthink data with you, there's nothing to see here—move on to the next chapter, [Get Information Out of DEVONthink](#). Otherwise, keep reading to learn about using this extremely handy tool.

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## Get to Know DEVONthink To Go

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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 that you [download the manual](#) for DEVONthink To Go, which is available in PDF, EPUB, and Mobipocket formats.

So, what can DEVONthink To Go do? It appears to have, at a rough guess, about 75 percent of the capabilities of the desktop versions of DEVONthink. For example, here's a *partial* list of what you can do in DEVONthink To Go:

- Sync data from DEVONthink for Mac (or DEVONthink To Go running on other iOS devices) via Dropbox, WebDAV, or a direct Wi-Fi connection.
- View any document type supported by iOS.
- Capture data from other apps (such as bookmarks, PDFs, text, and images) to a specific database or your global Inbox.
- Create new databases, groups, and tags.
- Create and edit documents in plain text, rich text, Markdown, and formatted note formats; rotate and apply filters to graphics; annotate PDFs; and convert (most) documents to other formats.
- Move, duplicate, replicate, group, tag, or delete items.
- Use complex search criteria to find your documents.
- Share documents using the iOS Share sheet.

However, you should also be aware of some limitations compared to the desktop versions of DEVONthink. Among the features DEVONthink To Go *does not* include are the following:

- Syncing via iCloud Drive
- Indexing documents stored elsewhere on your iOS device
- Creating new smart groups, or using smart groups created on your Mac (only a handful of built-in smart groups are available)
- Editing RTFD documents (RTF with graphics)
- Performing OCR on photos or scanned documents
- Splitting or merging documents
- The Concordance view

# Get Information Out of DEVONthink

Ordinarily, you'll interact with the data in your DEVONthink database using DEVONthink itself. However, in some cases you may want to give others (on your local network or around the world) live access to your information—or make your DEVONthink database available to yourself when you're using a computer without DEVONthink installed. DEVONthink Pro Office's built-in Web server lets you do just that. And, if the need arises, you can export or share static information from DEVONthink in a dizzying array of formats to suit almost any need.

**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.

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## Use DEVONthink's Web Server

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DEVONthink Pro Office has a built-in Web server that lets you share your database live over the Web. 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 Web site that provides shared information for all the employees of a small company. It also makes it possible to add new information to your database from a Web browser.

**Note:** Web sharing exists only in DEVONthink Pro Office, not in DEVONthink Professional or DEVONthink Personal.

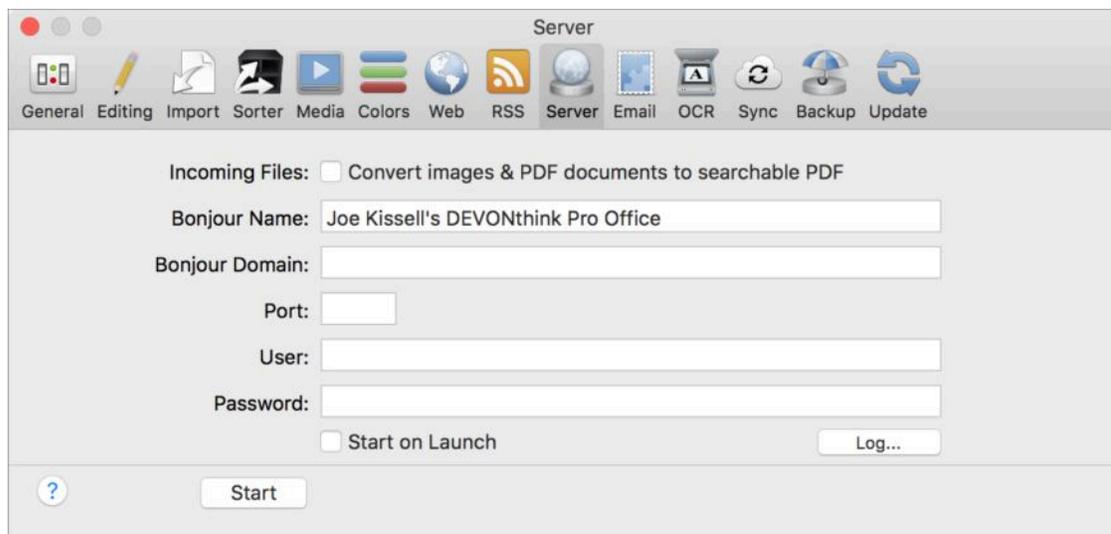
I want to emphasize, though, that this is not a full-blown database server, and it's not suitable for running a public Web site. Compared to stand-alone servers, DEVONthink lacks many standard security,

logging, performance, and customization features. So it's good at what it does—but just bear in mind that what it does is intentionally limited.

**Note:** By default, unless the Mac on which you're running DEVONthink has its own publicly routable IP address, your database will be visible only inside your internal network. It's possible to work around this by using techniques such as port forwarding, but that's beyond the scope of this book. For more information, see Glenn Fleishman's [Take Control of Your Apple Wi-Fi Network](#).

To set up the Web server, follow these steps:

1. Go to DEVONthink > Preferences > Server (**Figure 65**).



**Figure 65:** Set up DEVONthink's Web server here.

2. Edit any or all (or none) of the following fields to taste:
  - ▶ **Incoming Files:** Check “Convert images & PDF documents to searchable PDF” if you want DEVONthink to perform OCR on all images and PDFs uploaded via the Web interface.
  - ▶ **Bonjour Name:** Enter the name your DEVONthink Web server will have on the local network.
  - ▶ **Bonjour Domain:** If your local network contains more than one Bonjour domain (an unusual situation), enter the domain name at which your database will be reachable (to enable proper generation of relative links). Most people can ignore this setting.

# Dig Deeper

So far, I've only scratched the surface of DEVONthink's vast array of capabilities. Although I can't cover every last 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.

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## Maintain Your Databases

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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

The Tools > Verify & Repair command checks the selected database for errors, and if it finds any, it fixes those it can. So choosing this command is a quick and easy way to solve many common problems.

During the repair process, if DEVONthink finds any files in its package on disk that don't have corresponding entries in your database, it (re)imports them and puts them in a new group, at the top level of your database, called Orphaned Files. You can then move these newly adopted documents to the group(s) of your choice.

## Backup & Optimize

You can configure DEVONthink to automatically back up and optimize its database periodically in DEVONthink > Preferences > Backup. (When it does so, it backs up *only* the files containing metadata and indexes, not the documents themselves, which are more usefully backed up using Time Machine or your favorite backup utility.) However, regardless of that setting, you can manually perform the procedure at any time by choosing Tools > Backup & Optimize.

**Warning!** If your index is damaged before you choose this command, your backup version will be damaged too! So it's best to do this right after you've successfully completed a Verify & Repair. If repairs were unsuccessful for any reason, skip Backup & Optimize for now.

## Restore from Backup

If the Verify & Repair command was unable to fix all your database problems, you might be best served by going back to your most recent backup (assuming you either had automatic backups turned on or manually used the Backup & Optimize command relatively recently). To do this, choose Tools > Restore Backup, select a backup (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.

## 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 Tools > Rebuild Database and click OK. DEVONthink exports all your documents and then re-imports them.

# Learn More

You can learn more about DEVONthink by consulting any of the following resources:

- [DEVONthink User Manuals](#): The official documentation from DEVONtechnologies (available in PDF, EPUB, and Mobipocket formats) covers other features that didn't fit into this book.
- [DEVONtechnologies User Forum](#): Share your tips and experiences with other DEVONthink users, get problem-solving advice, and learn new ways to accomplish tasks in the User Forum.
- [Devonian Times](#): To keep up with news about DEVONtechnologies, its products, and more, read Devonian Times, a blog by company president Eric Böhnisch-Volkman.

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## About the Author

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Joe Kissell is the author of numerous books about technology, including [\*Take Control of Your Online Privacy\*](#) and [\*Take Control of Dropbox\*](#). He is also a contributing editor to TidBITS and a senior contributor to Macworld.

When not writing or speaking, Joe likes to travel, walk, cook, eat, and practice t'ai chi. He lives in San Diego with his wife, Morgen Jahnke; their sons, Soren and Devin; and their cat, Zora. To contact Joe about this book, [send him email](#) and *please* include [Take Control of Getting Started with DEVONthink 2](#) in the subject. But note that although Joe is happy to receive feedback on this book, *he cannot offer any technical support for using DEVONthink*.

## Shameless Plug

On my site [Joe On Tech](#), I write about how people can improve their relationship with technology. I'd be delighted if you stopped by for a visit! You can also sign up for [joeMail](#), my free, low-volume, no-spam mailing list, or follow me on Twitter ([@joekissell](#)). To learn more about me personally, visit [JoeKissell.com](#).

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