

DAYLITEDOCS 1 FOR  
DAYLITE

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# General

# DayliteDocs 1 for Daylite

## About DayliteDocs

DayliteDocs provides you with full access to the documents linked with or stored within your Daylite database. Use the standard features built in to Daylite to add documents to your database or use the companion app Docs2Daylite to import documents including their textual content.

DayliteDocs allows you to search and filter both your entire database at once or just selected people, companies, projects and opportunities for linked files and documents. Results can be previewed right in Daylite or opened and edited in the associated app installed on your Mac (e.g. a Word document can be opened and edited in Microsoft Word).

The comparison feature enables you to compare two documents to find and review changes. Subsequent indexing of PDF files available in your Daylite database makes it possible to even search the textual content of those files (the PDF document's text needs to be highlightable and copiable).

## Features

DayliteDocs provides the following features:

- Import files by dragging & dropping PDF onto Docs2Daylite and make textual content searchable (requires text to be highlightable and copiable)
- List all files and documents existing in your Daylite database in one spot
- Use a wide range of search and filter functions to find files
- Preview found documents directly in Daylite
- Open a selected document in an installed app of your choice (e.g. Pages document in Pages)
- Use the comparison feature for selected file formats to find and review changes
- Make existing PDF files subsequently full text searchable (requires text to be highlightable and copiable)

## System Requirements

Operating system: OS X 10.8 or newer

Daylite version: 5 or newer

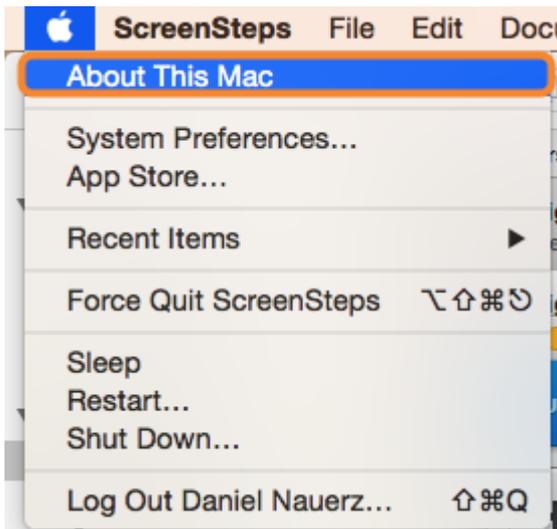
# Setup

# Installation

1. DayliteDocs requires Daylite 5.x or newer. To check your Daylite version, go to the Daylite menu and select **About Daylite**.



2. DayliteDocs requires at least OS X 10.8. To check your OS X version, go to the **Apple** menu and select **About this Mac**.



3. [Download](#) DayliteDocs. Double-click DayliteDocs for Daylite.dmg

4. Double-click DayliteDocs.daylite-plugin.

5. Click **Install**

6. To finalize the installation click **Restart Daylite**

After the installation DayliteDocs can be used for 14 days free of charge. If you would like to use it after these 14 days, please proceed to chapter [Licensing](#).

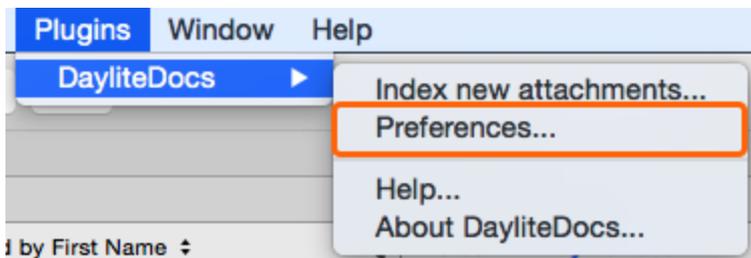
**Please note:** To import PDF files DayliteDocs requires the companion app **Docs2Daylite**. You will find this companion in your **Applications** folder and an alias on your desktop.

# Licensing

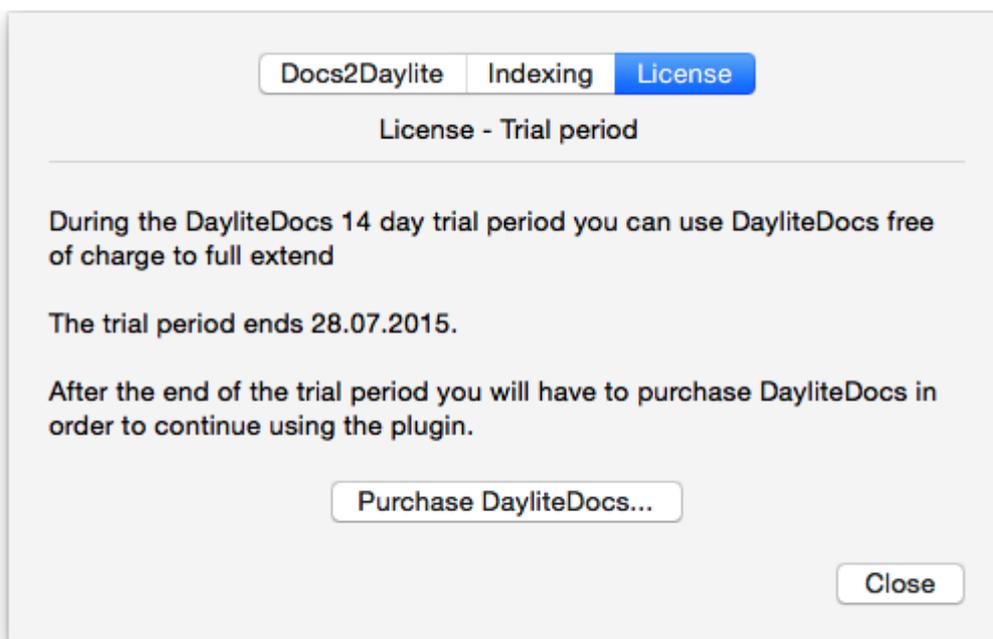
After the installation it is possible to test DayliteDocs free of charge during a 14 day trial period. If you would like to continue using the plug-in, you need to purchase a license. In order to purchase DayliteDocs, please follow these steps (given the plugin is already installed):

## In-App Purchase / Subscription

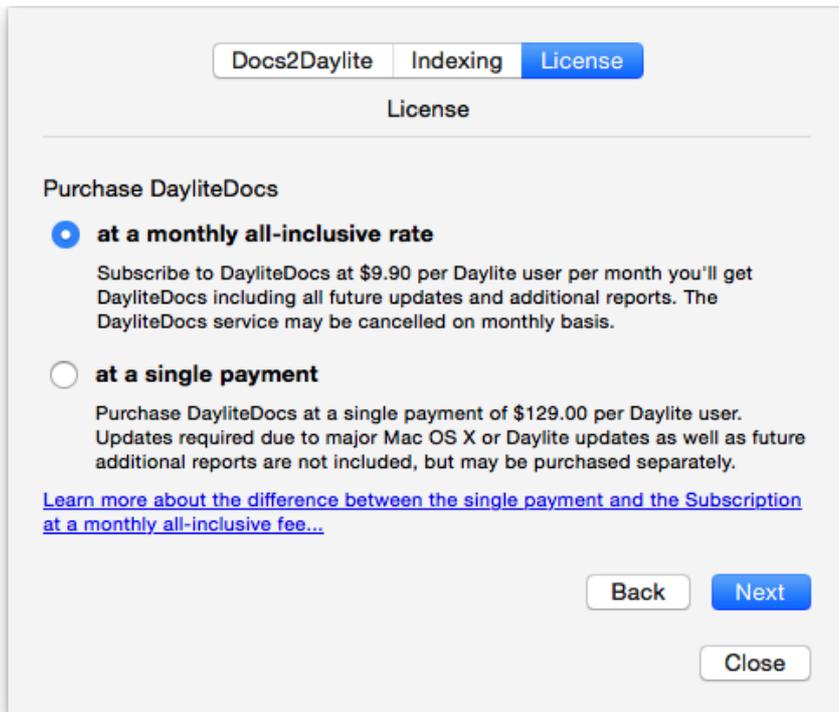
1. Start Daylite
2. In the Daylite menu select Plugins --> DayliteDocs --> Preferences...



3. Select the License tab and click Purchase DayliteDocs



4. Select whether you would like to subscribe to DayliteDocs as a monthly service or to purchase it at a single payment.



The screenshot shows a dialog box titled "License" with three tabs: "Docs2Daylite", "Indexing", and "License". The "License" tab is selected. Below the tabs, the text "Purchase DayliteDocs" is followed by two radio button options. The first option, "at a monthly all-inclusive rate", is selected. The second option, "at a single payment", is unselected. Below the options, there is a link: "Learn more about the difference between the single payment and the Subscription at a monthly all-inclusive fee...". At the bottom right, there are three buttons: "Back", "Next", and "Close".

Docs2Daylite Indexing License

License

Purchase DayliteDocs

**at a monthly all-inclusive rate**  
Subscribe to DayliteDocs at \$9.90 per Daylite user per month you'll get DayliteDocs including all future updates and additional reports. The DayliteDocs service may be cancelled on monthly basis.

**at a single payment**  
Purchase DayliteDocs at a single payment of \$129.00 per Daylite user. Updates required due to major Mac OS X or Daylite updates as well as future additional reports are not included, but may be purchased separately.

[Learn more about the difference between the single payment and the Subscription at a monthly all-inclusive fee...](#)

Back Next Close

## DayliteDocs Subscription

If you would like to subscribe to the DayliteDocs please do the following:

1. Click the at a monthly all-inclusive rate radio button and then Next

Docs2Daylite Indexing **License**

License

Purchase DayliteDocs

**at a monthly all-inclusive rate**

Subscribe to DayliteDocs at \$9.90 per Daylite user per month you'll get DayliteDocs including all future updates and additional reports. The DayliteDocs service may be cancelled on monthly basis.

**at a single payment**

Purchase DayliteDocs at a single payment of \$129.00 per Daylite user. Updates required due to major Mac OS X or Daylite updates as well as future additional reports are not included, but may be purchased separately.

[Learn more about the difference between the single payment and the Subscription at a monthly all-inclusive fee...](#)

Back Next

Close

2. Accept the license agreement, enter the desired number of licenses and click Next.

Docs2Daylite Indexing **License**

License

I have 5 active users in my database

I want  licenses for DayliteDocs

The subscription may be updated any time and will be in effect immediately

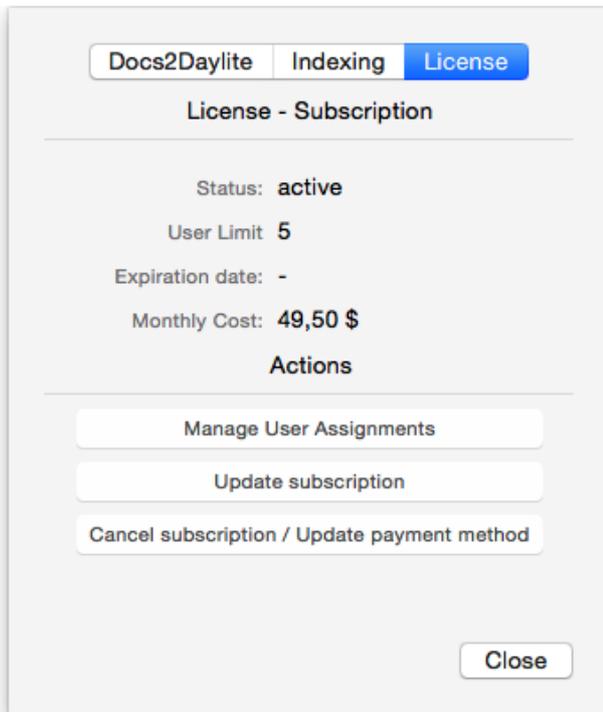
With the subscription of DayliteDocs you accept our license agreement

Back Next

Close

After completing all steps you'll see a summary of your subscription.

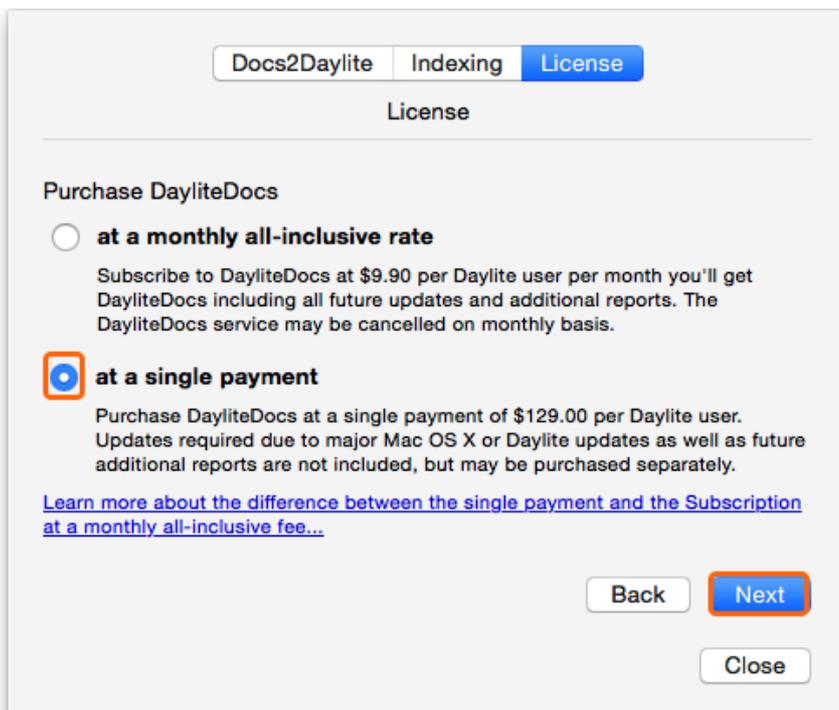
3. To finalize your subscription click **Manage User Assignments** to assign the licenses to Daylite users



## Purchase DayliteDocs

If you would like to purchase DayliteDocs, please do the following:

1. Click the at a single payment radio button and then Next



2. Accept the license agreement, enter the desired number of licenses and click Next

Docs2Daylite | Indexing | **License**

License

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I have 5 active users in my database

I want  licenses for DayliteDocs

With the subscription of DayliteDocs you accept our license agreement

After completing all steps you'll see a summary of your subscription.

3. To finalize your subscription click **Manage User Assignments** to assign the licenses to Daylite users

Docs2Daylite | Indexing | **License**

License - License overview

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Licensed users 5

Actions

# Usage

# Global View

The DayliteDocs' global view provides an overview of all your files documents and file references in Daylite. It is possible to:

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- Search files
- Filter files
- Review linked (parent) objects
- Preview files
- Open files with available apps on your Mac
- Use the comparison feature built-in to Microsoft Word to compare Word documents (requires Microsoft Office for Mac 2008 or newer)

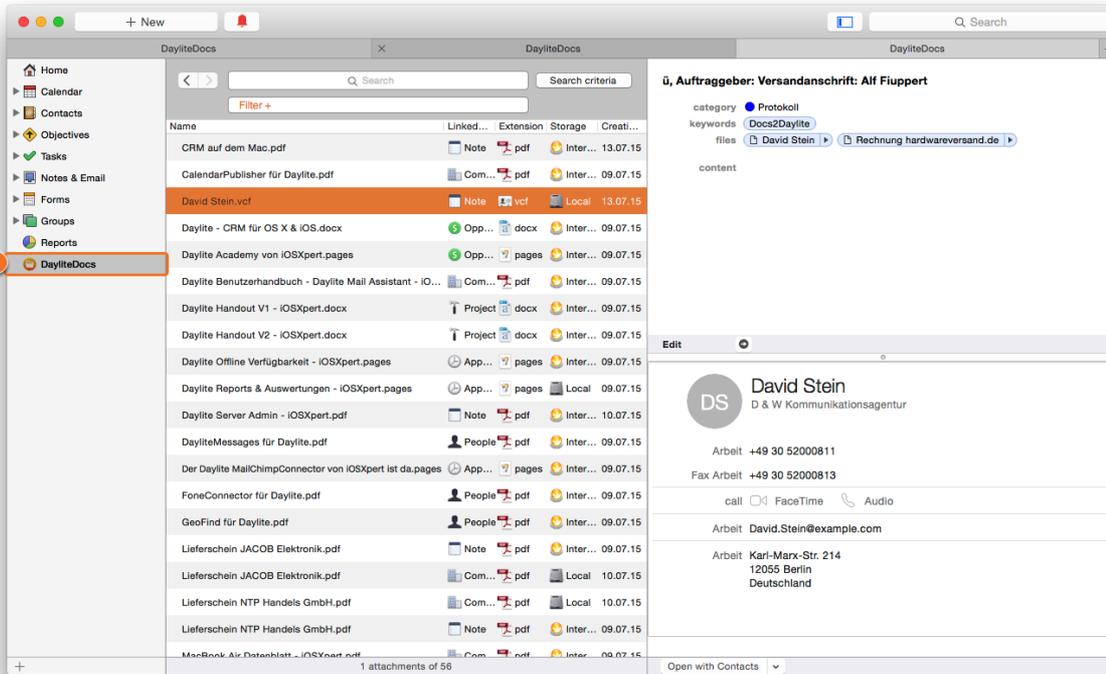
Please note: in Daylite all files are always linked to a parent object. E.g. a PDF file is attached to an email, the folder reference is linked to a project and a contract document is linked to a company.

## Navigation

The following describes how to navigate within DayliteDocs' global view.

### Location of The Global View Icon

(1) In Daylite 5 the global view can be accessed by clicking the DayliteDocs icon in the lower part of the left sidebar

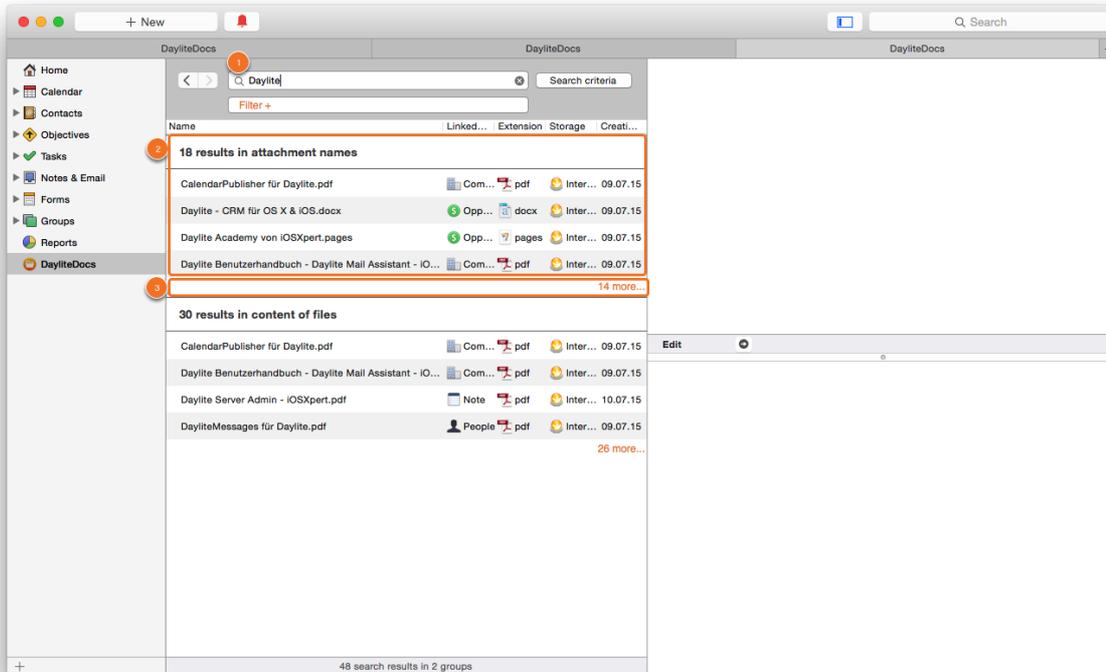


## Navigation Within DayliteDocs

The DayliteDocs view consists of the following areas:

- (1) Navigation bar with [search](#) and [filter](#) option as well as the corresponding settings
- (2) List of all files or those files meeting the currently applied search and filter criteria
- (3) [Detail view](#) of the selected file's parent object
- (4) [Preview](#) of the selected file(s) with the option to open or to [compare](#) two files
- (5) Footer with information about total amount of displayed or selected files





## Search Criteria

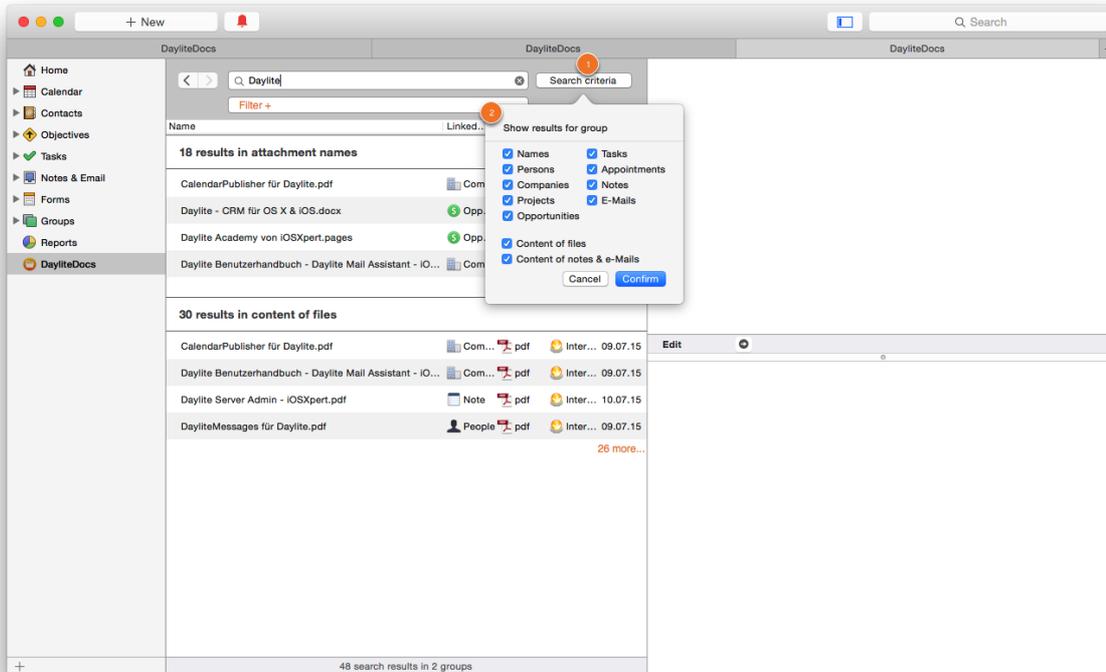
To narrow down your search (and also speed up the search) you can determine WHERE to search (1) before you enter a search string. The search can be performed on the following elements (2):

- Names (file names)
- People (first name, last name, middle name, prefix and suffix)
- Companies (company name)
- Projects (project name)
- Opportunities (opportunity name)
- Task (task title)
- Appointments (appointment title)
- Notes (note title)
- Emails (email subject)
- Full text search of documents (see chapter [Full Text Search](#) below)
- Full text search of notes and emails (see chapter [Full Text Search](#) below)

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A search for "Max" for example would display all file where the file name contains "Max" but also files linked to contacts whose name is Max or whose name contains Max. You can select one criterion, multiple or all criteria. You need to confirm your selection before performing the next search (3).

**Please note:** the full text search of documents and/or notes and emails slows down the search significantly!



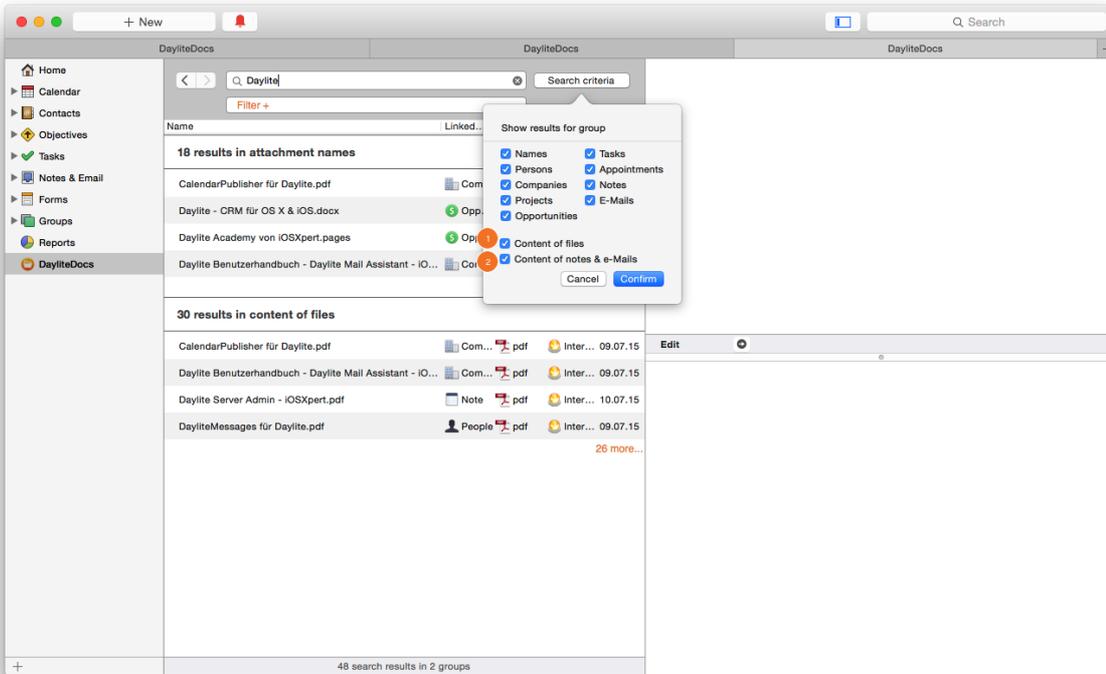
## Full Text Search

Full text search is a mighty tool in DayliteDocs. Opposed to the search for file name and names of parent objects it searches the textual content of documents. Please note that this kind of search may take a while, depending on database size, document size and amount of documents.

Click **Search criteria** and check the box next to **Content of files (1)** and confirm your selection to search the textual content of your PDF documents.

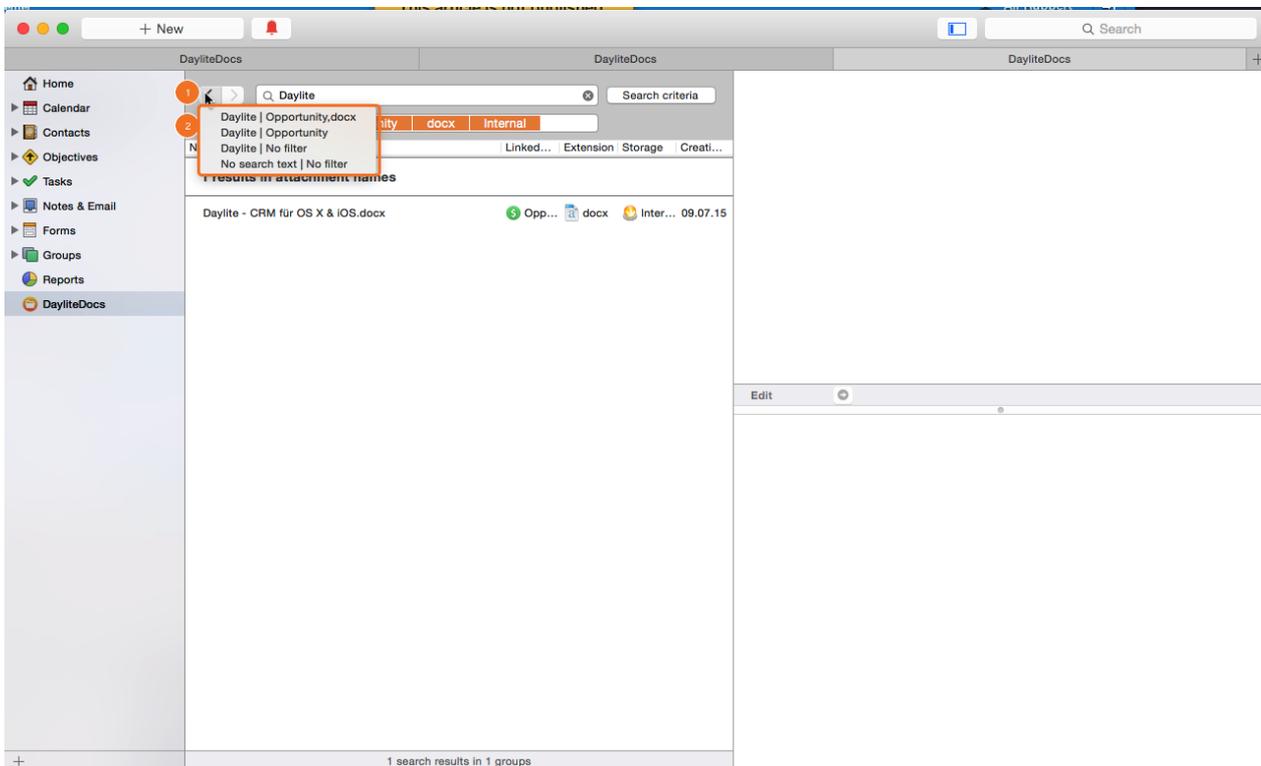
**Please note:** in order to search the textual content of PDF documents they either need to be [indexed](#) or imported using the [Docs2Daylite](#) companion app. In addition to that it needs to be possible to highlight and copy the document's text (e.g. OCR'ed PDF files). The content of a PDF document that contains just a picture will not be searchable.

In case your PDF documents have been imported via the PDF2Daylite plugin, please use the search criterion **Content of notes & email (2)**. This criterion will also find documents attached to notes an emails whose textual content contains the search string.



## Access Previous Searches

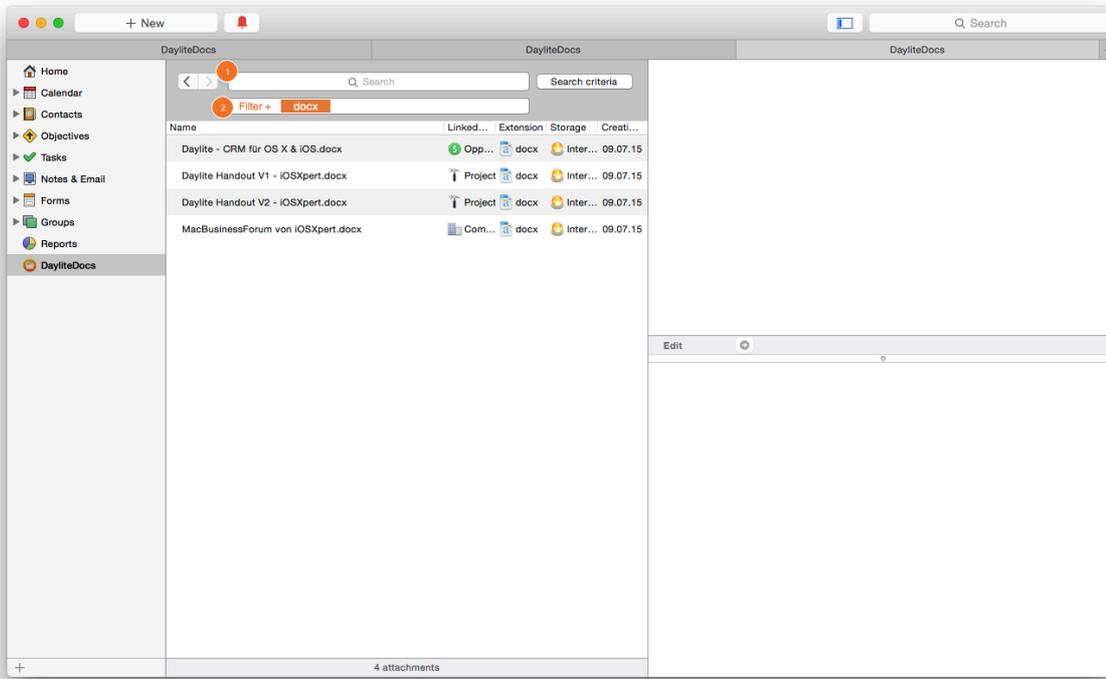
It is possible to return to previous searches, so you don't need to retype a search string. To do so, use the arrows (1) in the navigation bar. Click and hold the arrow to get a list of previous searches (2).



# Filter Files

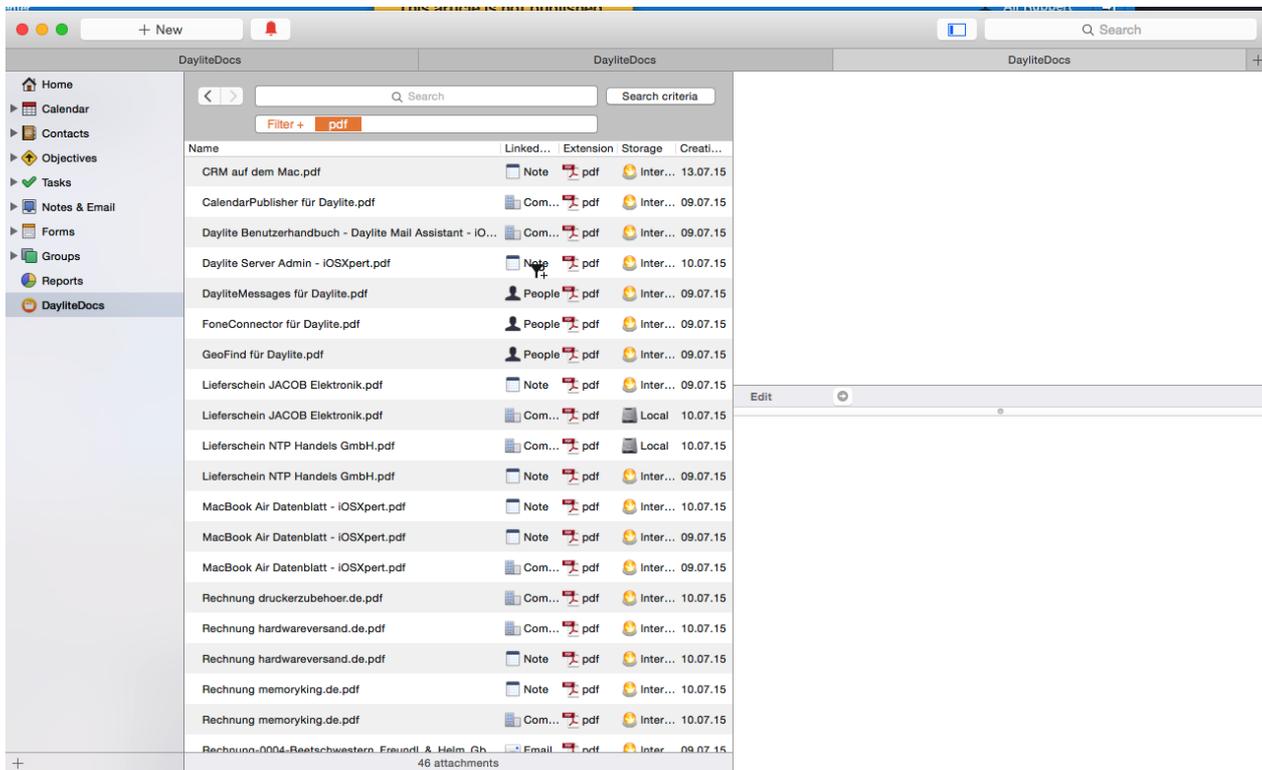
To narrow down the search (and also increase search speed) you can determine WHAT you would like to search (1). You can filter by certain criteria or use the filter preferences (2) dialog to determine filter criteria

Filter allow you for example to search for internal files of a certain type (e.g. Word documents).



## Apply Filter On-The-Fly

On-the-fly Filter can be applied directly from within the table/list of files. To do so, move your cursor over the column with the desired criterion (e.g. file extension). The cursor then turns into a funnel symbol (2). A click applies the filter criterion (e.g. PDF) and it will be displayed in the navigation bar (3).



## Filter Criteria Settings

Within the navigation bar filter criteria can be added in the same manner as search criteria. To do so, click **Filter+** (1).

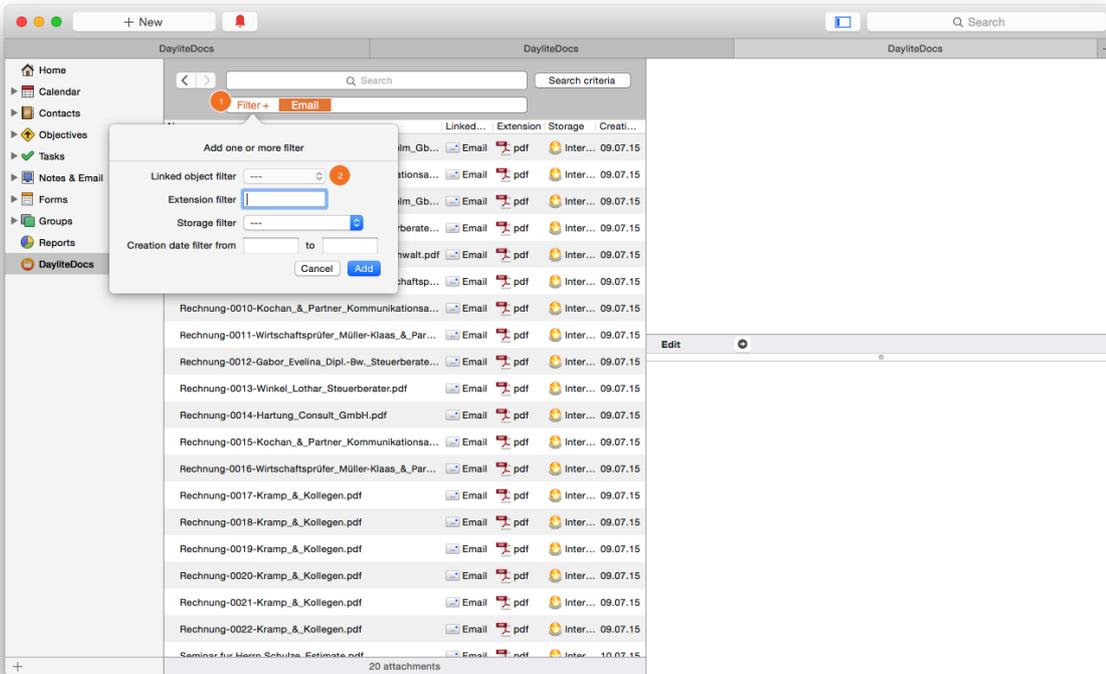
The following filter can be used:

- Linked object (e.g. just files linked to emails)
- File type (e.g. just PDFs or JPEGs)
- File location (e.g. files within the database or archived files)
- Creation date (only files that have been added to Daylite within a given time frame)

If you have already applied one of the above criteria the criterion is being greyed out (2). This means that only for one file type at a time can be filtered for example. To filter for PDF files and DOC files at the same time is currently not possible.

Click **Add** to apply the filter criteria

**SCREENSHOT BENÄ-TIGT (Filterkriterium ausgeklappt, z.B. schon "EMails" als Filter eingefügt)**



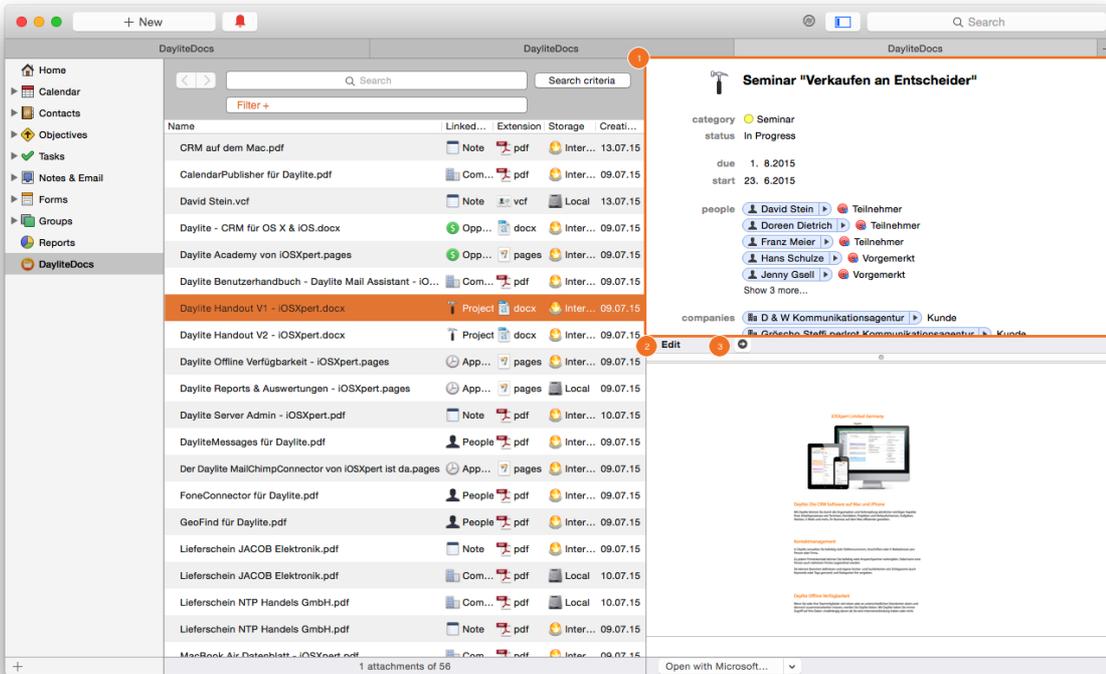
## Detail View and Preview

After the search result has been displayed, it is possible to preview the files, proceed directly to the file's parent object or even compare two documents. The parent object is the Daylite object the document is linked with (e.g. a project an invoice document is linked with).

## Detail View of Parent Objects

As soon as a file in the list is being selected, the parent object shows in detail view (1).

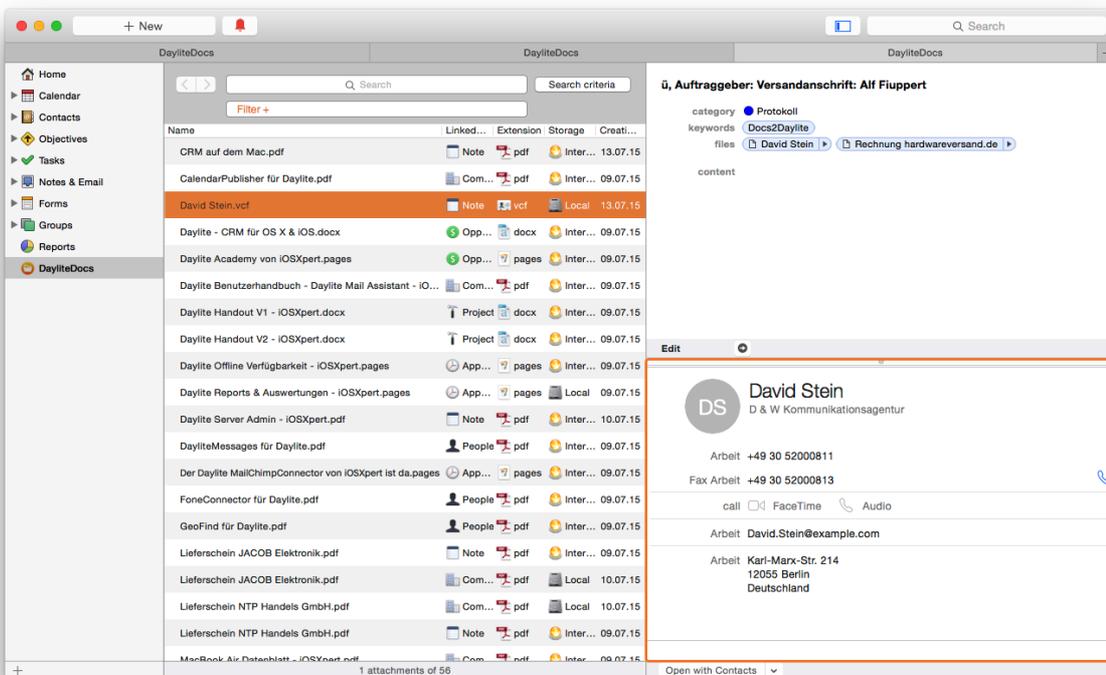
The parent object can now be reviewed (e.g. read an email), edited (2) or be opened in a new Daylite window or tab (3).



## Preview Pane

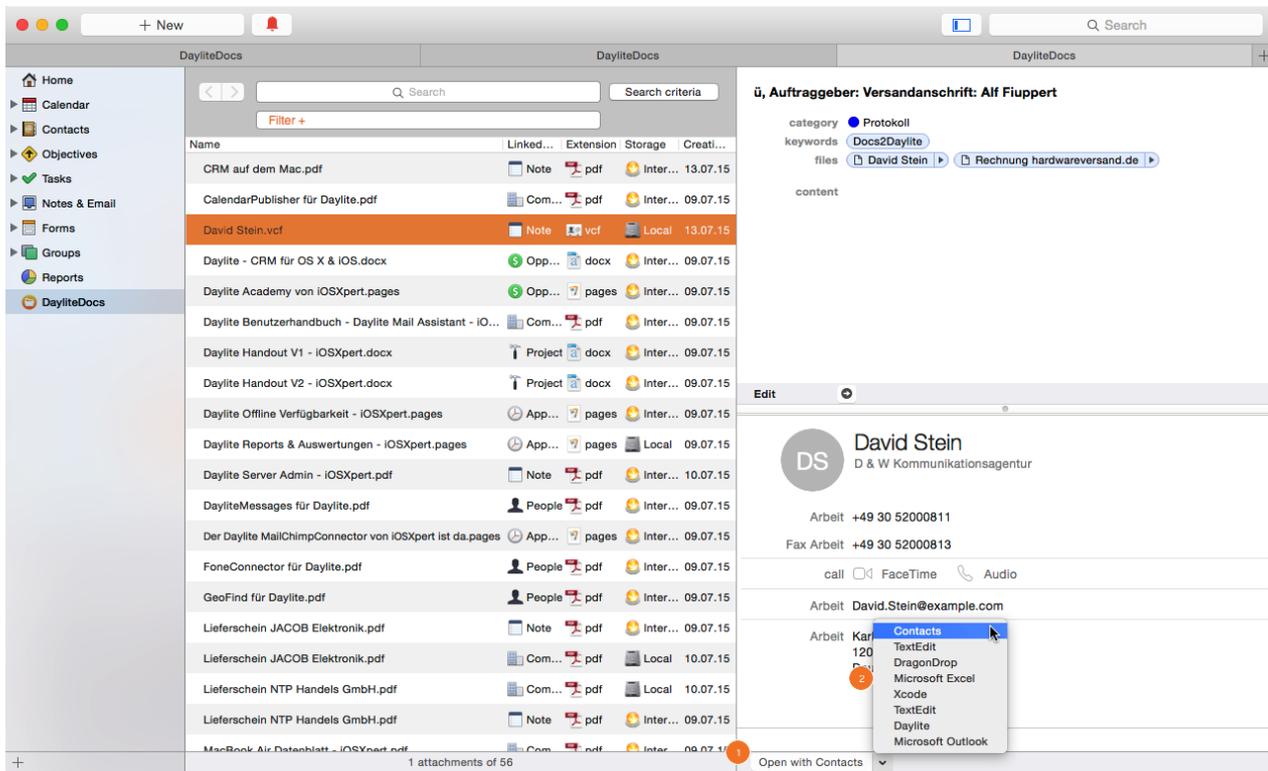
The preview pane is located right below the detail view. A preview of a selected file will be displayed here.

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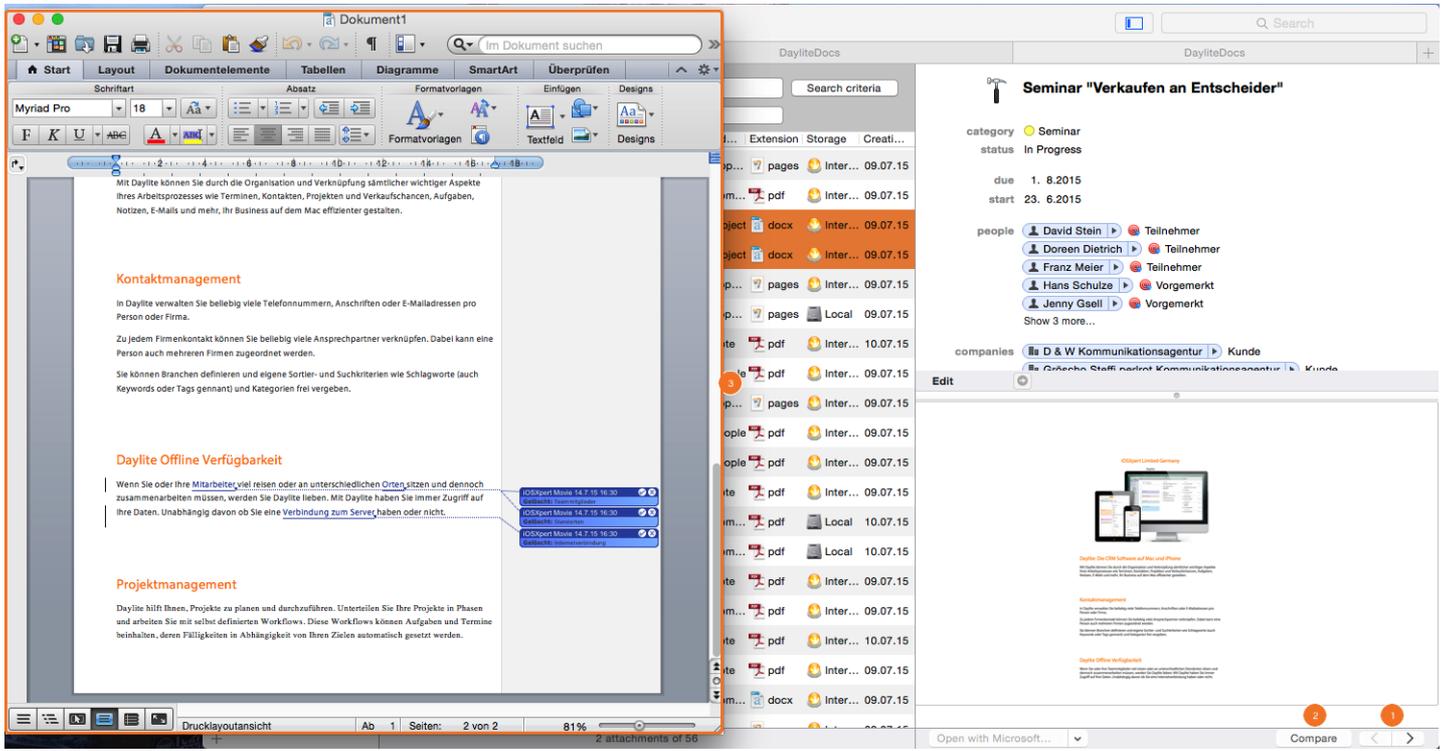
# Opening a File

To open the selected file with the app OS X associated with this kind of file type, click the **Open with xx** button (1) in the lower left corner of the preview pane. To open the file with a different app, click the little arrow (2) next to the **Open with xx** button and select the desired app from the list



# Compare

When selecting multiple files it is possible to review them one after another by using the arrow buttons (1). When selecting just two files, the **Compare** button (2) becomes available. Click this button and both selected files will be displayed side by side in a new separate window. If you have selected two Word documents (.doc or .docx) a click on the **Compare** button triggers the comparison feature built in to Microsoft Word (this feature requires Microsoft Office for Mac 2008 or newer) which highlights all the changes (3).



# DayliteDocsTab

Beside the global view DayliteDocs provides individuals tabs for the following Daylite elements:

- Projects
- Opportunities
- Companies
- People

These different tabs as well as the global view provide the same functionality. The only difference is the underlying data basis. Whereas global view searches **all** documents in the Daylite database, the DayliteDocs tabs search just the currently selected element. The DayliteDocs project tab for example, searches just the documents directly linked to the selected project or those files attached to elements like people, companies or emails linked to this particular project.

## Example

We're using the DayliteDocs tab in projects as an example to describe how the tab works. The tabs works identical in the Daylite elements People, Companies and opprtunities.

## DayliteDocs Tab

- (1) Select a project
- (2) Click the DayliteDocs tab
- (3) Use the [search](#) and [filter](#) function to find the desired documents
- (4) Select one or multiple files from the search result list
- (5) Retrive [additional info](#) about the parent object or edit it
- (6) [Preview](#) the selected file and [open](#) it
- (7) [Compare](#) two selected files

The screenshot displays the DayliteDocs application interface. On the left is a sidebar with navigation options like Home, Calendar, Contacts, Objectives, My Active Projects, My Active Opportu..., All Projects, Tasks, Notes & Email, Forms, Groups, Reports, and DayliteDocs. The main area is divided into three sections:

- Project List (Left):** A list of projects arranged by due date. The selected project is "Seminar 'Verkaufen an Entschel...'" (Akquise).
- Document Table (Center):** A table showing documents related to the selected project.
 

Name	Linked...	Extension	Storage	Creatio...
CalendarPublisher für Daylite.pdf	Com...	pdf	Internal	09.07.15
Daylite Handout V1 - iOSXpert.docx	Project	docx	Internal	09.07.15
Daylite Handout V2 - iOSXpert.docx	Project	docx	Internal	09.07.15
MacBusinessForum von iOSXpert.docx	Com...	docx	Internal	09.07.15
Seminar für Herrn Schulze_Estimate_Dez..._10_2013_1...	People	pdf	Local	11.03.15
- Document Detail View (Right):** A detailed view of the selected document, "Seminar 'Verkaufen an Entscheider'". It shows metadata such as category (Seminar), status (In Progress), due date (1. 8.2015), and start date (23. 6.2015). It also lists participants (David Stein, Doreen Dietrich, Franz Meier, Hans Schulze, Jenny Gsell) and the company (D & W Kommunikationsagentur). Below this is a preview of the document content, which includes a header "Office 365 Summary" and some introductory text.

At the bottom of the interface, there are controls for opening the document with Microsoft Word and a compare function.

# Import Documents With Docs2Daylite

The following describes two ways to add documents to Daylite

**Please note: the current Docs2Daylite version supports PDF files only!**

## Import PDF Files

To import a PDF file to Daylite drag & drop the the file onto the Docs2Daylite companion app. The app is available on the desktop and/or in the Applications folder.

Please note: to be able to perform a full text search with DayliteDocs later on, the text of a PDF file needs to be highlightable and copiable. PDF files created on a Mac usually already contain highlightable and copiable text. In case of scanned documents OCR (optical character recognition) needs to be applied. Read more about scanning documents in the this [chapter](#).

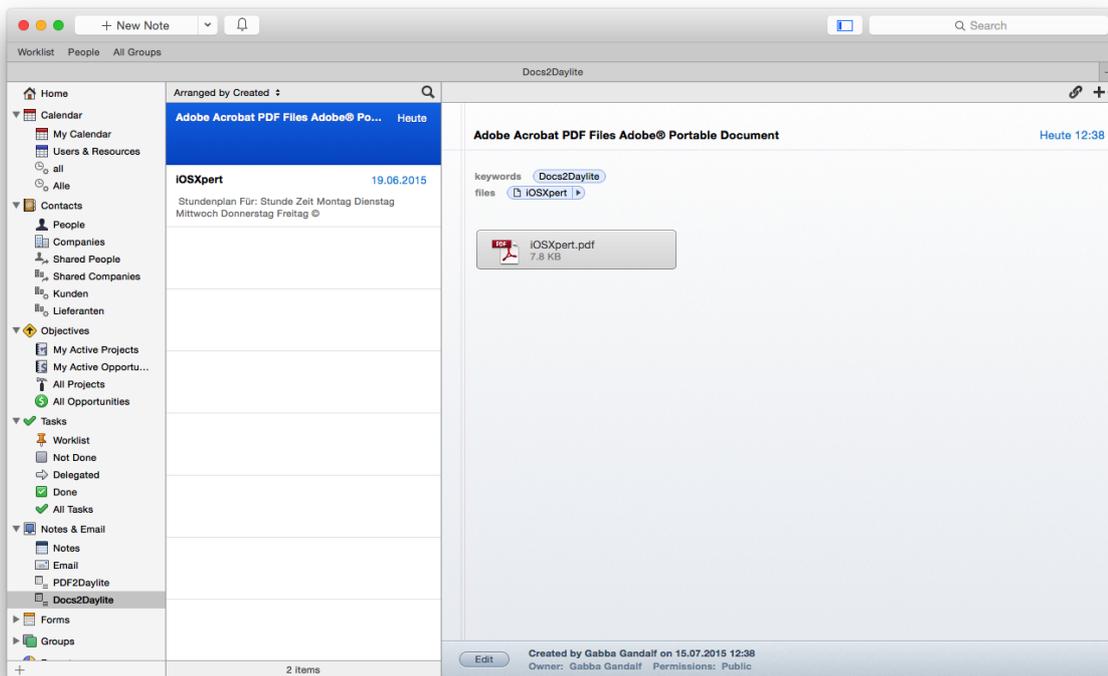
1. Select one or multiple PDF file you would like to import



2. Drag & drop the file(s) onto the Docs2Daylite icon on the desktop or within the Applications folder



3. The file(s) will be imported

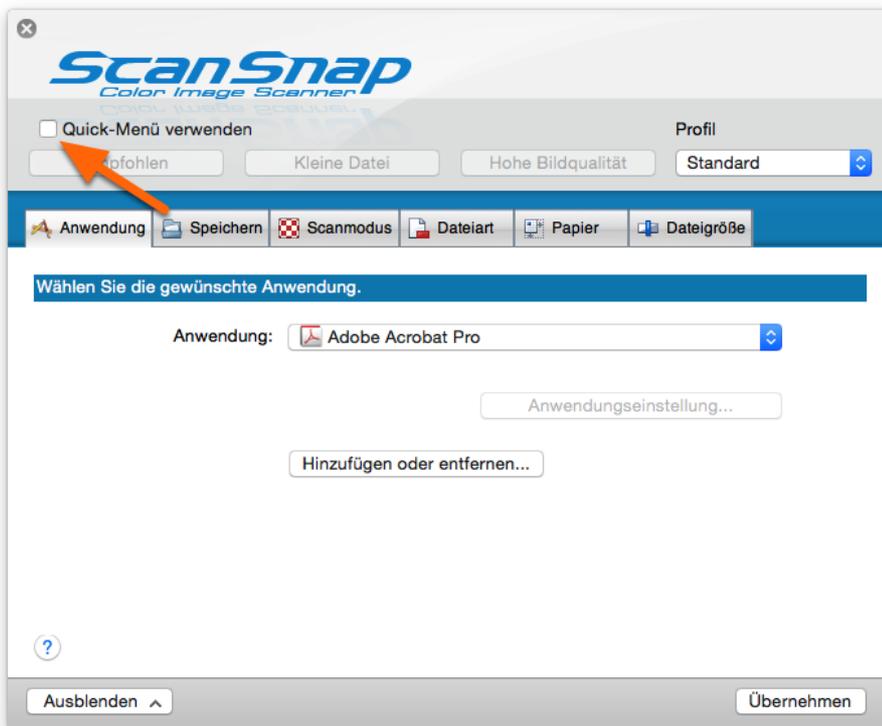


## Scan to Daylite With a ScanSnap Scanner Prerequisites

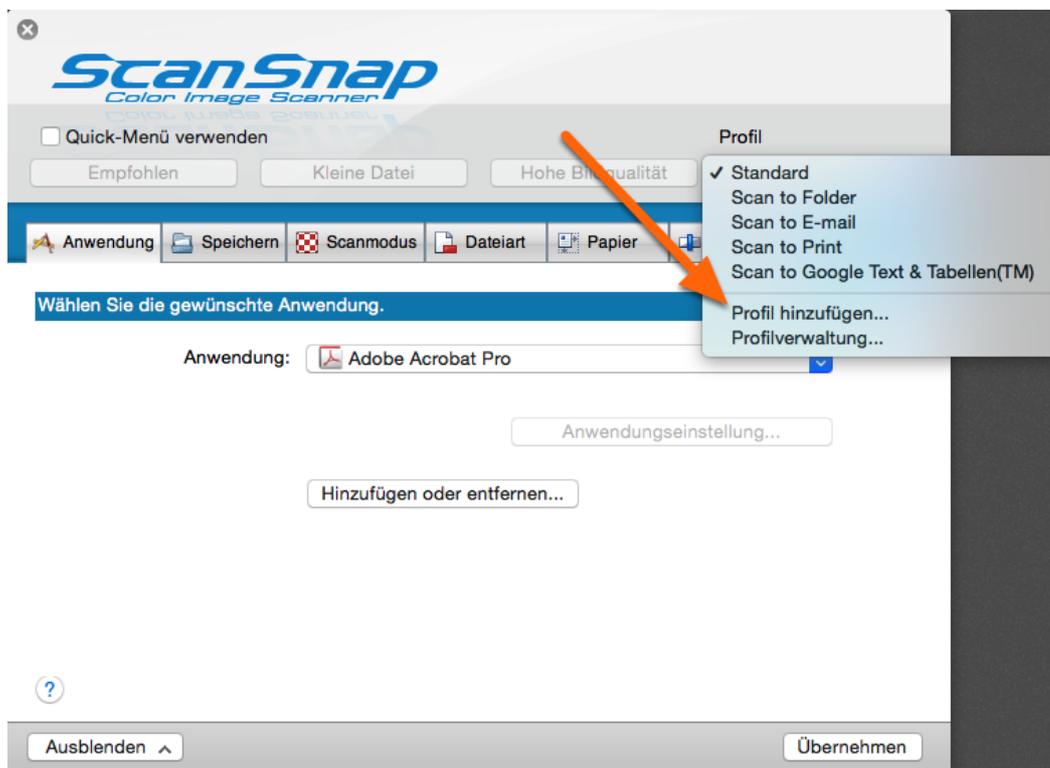
A ScanSnap scanner allow you to scan a document directly into Daylite. This requires the ScanSnap software to be configured accordingly.

Please note: to be able to perform a full text search with DayliteDocs later on, the text of a PDF file needs to be highlightable and copiable.

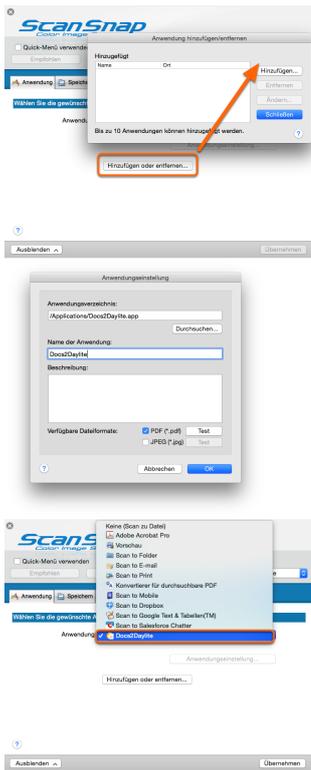
1. Start the ScanSnap Manager app, open the Settings and deactivate Quick Menu



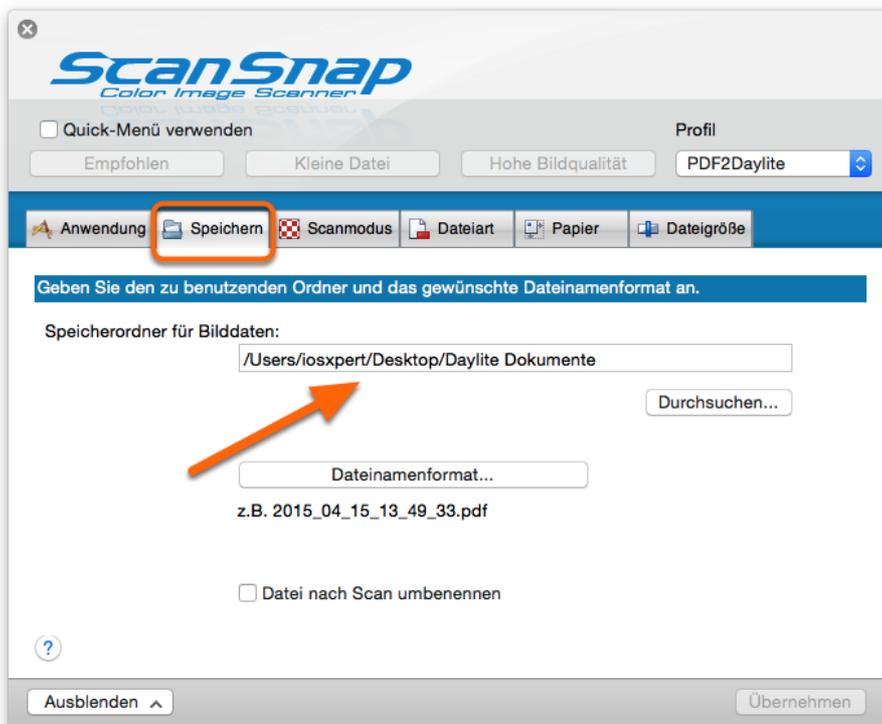
2. In the Profile drop-down menu click Add Profile... and assign a name



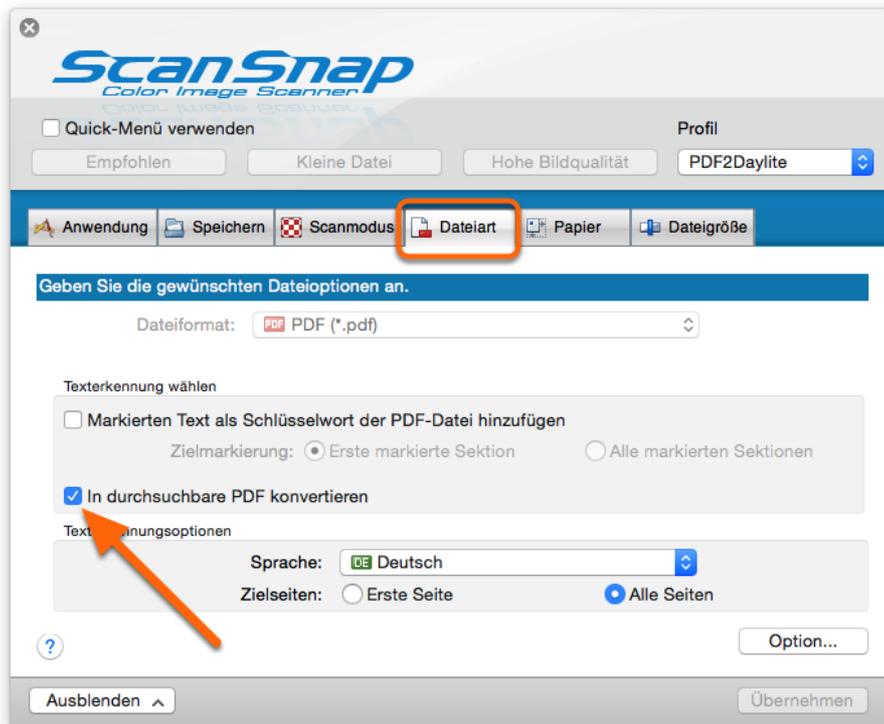
3. To scan directly to Daylite, the Docs2Daylite companion app needs to be added to the ScanSnap Manager once



4. Select a folder where you want to save the scanned documents in addition to the Daylite database



5. To ensure that Daylite can perform a full text search on the scanned PDF document, check the option Convert to Searchable PDF



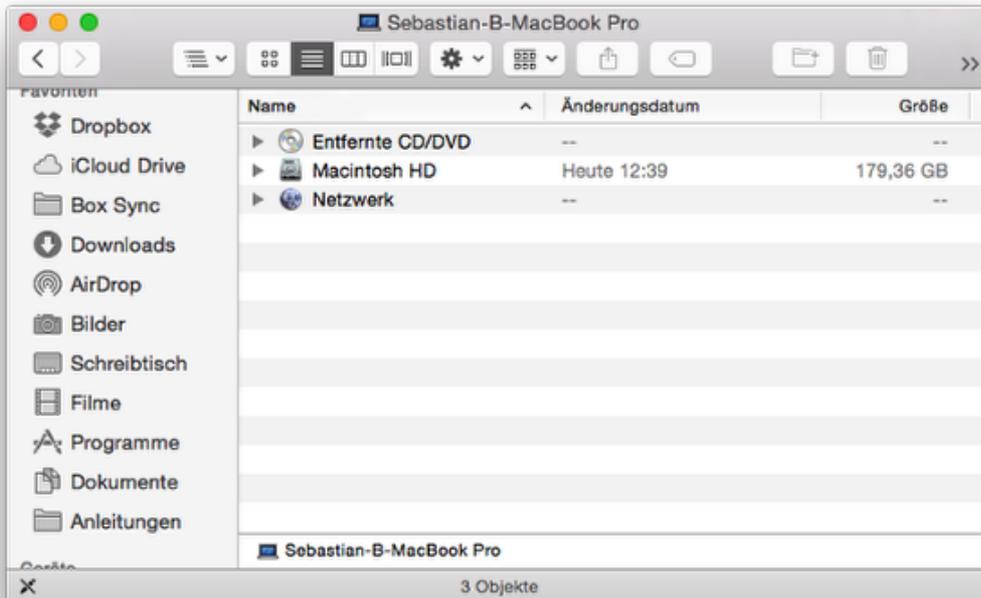
When a document is being scanned now, the PDF file will automatically be added to Daylite and be available to be searched by DayliteDocs

# Miscellaneous

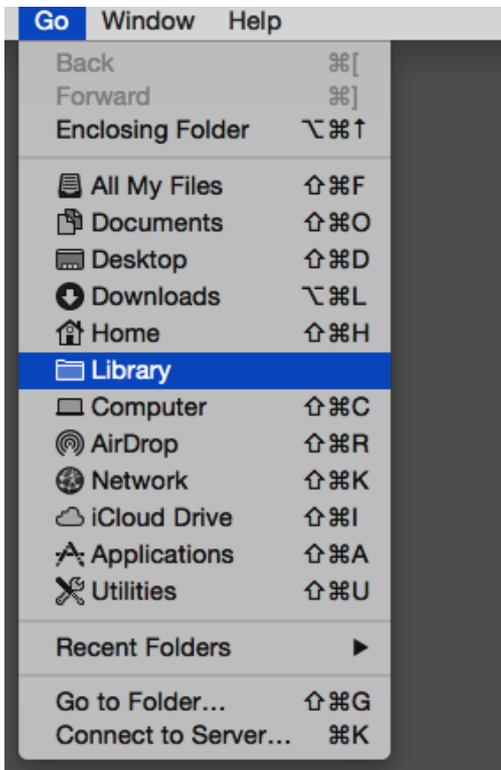
# Removing the Plug-In

Follow these steps to deinstall a Daylite plugin

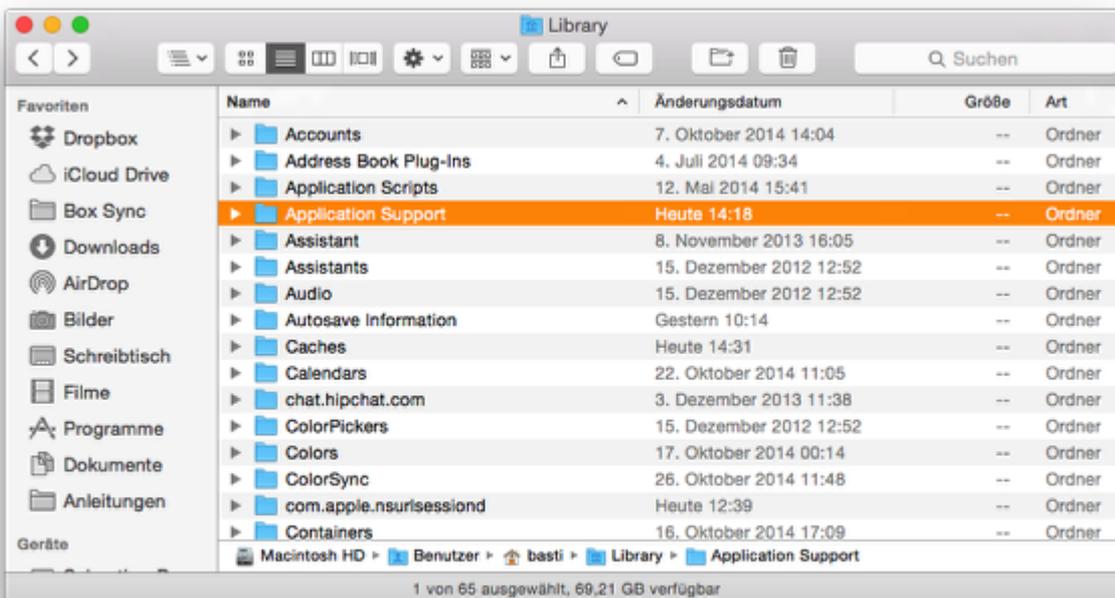
## 1. Open Finder



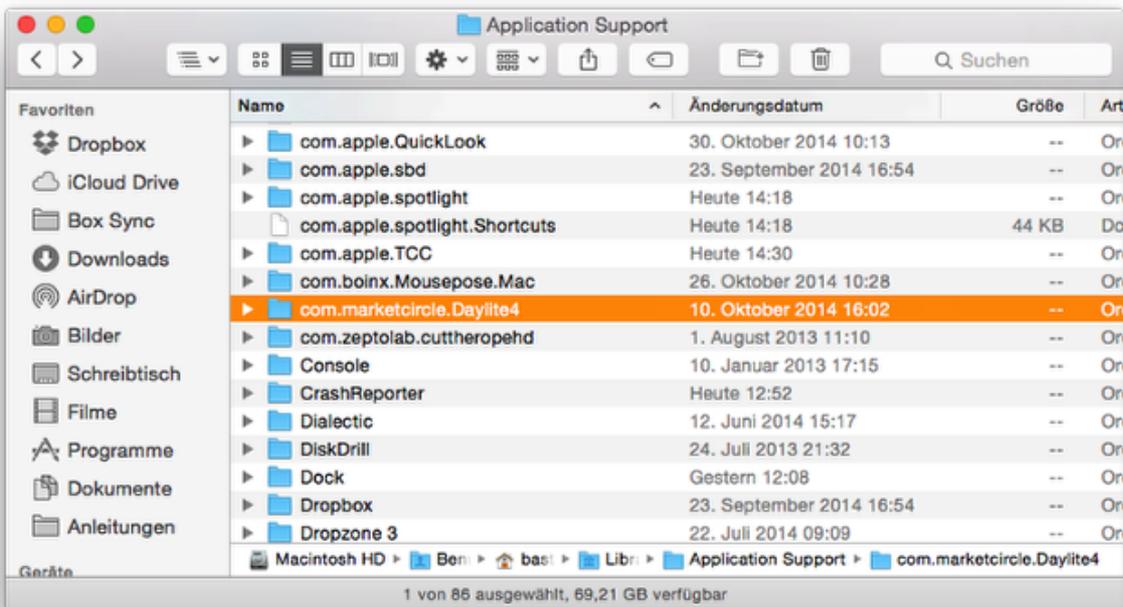
2. In the menu bar select Go and hold down the  $\text{⌘}$  alt key. The Library folder will appear.



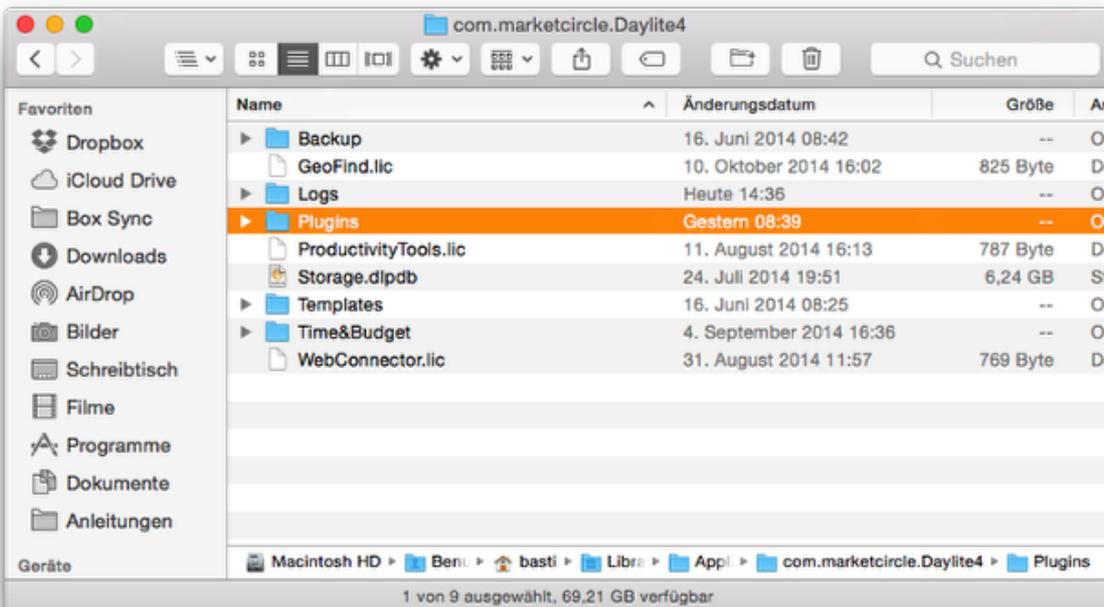
4. Navigate to the folder Application Support ->



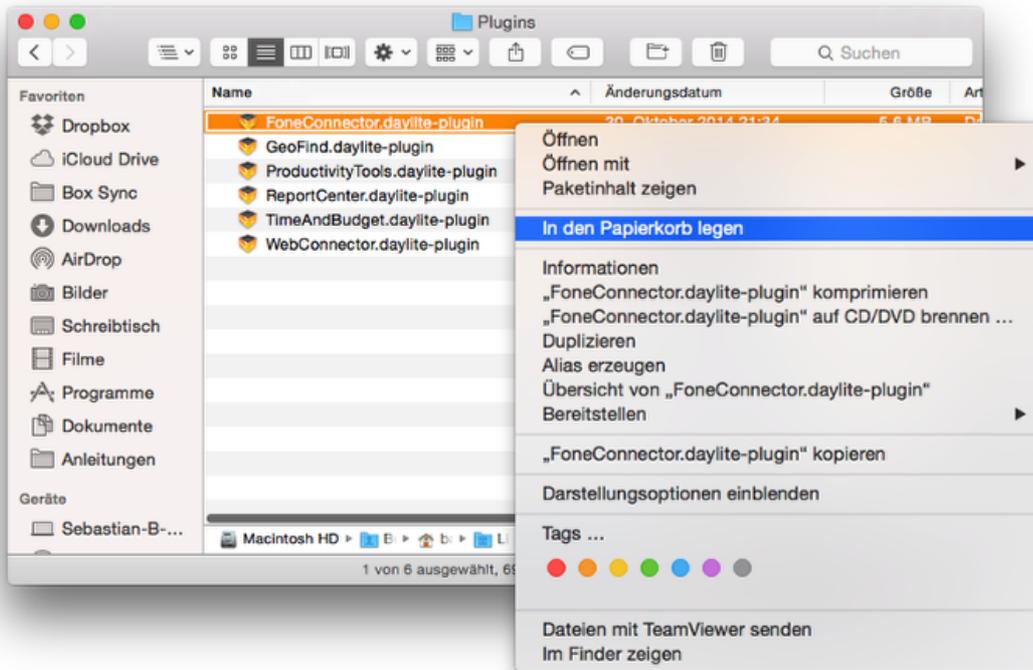
5. -> com.marketcircle.Daylite4 ->



## 6. -> Plugins



## 7. Delete the file DayliteDocs.daylite-plugin



## 8. Restart Daylite