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 an 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.**.

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- 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 <u>Licensing</u>.

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 woud 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

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Usage

Global View

The DayliteDocs' global view provides an overview of all your files documents and file references in Daylite. I 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 linke 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

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Navigation Within DayliteDocs

The DayliteDocs view consists of the following areas:

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



Search for Files

By default DayliteDocs' global view shows all files and documents in your Daylite database in a list. If you are looking for a specific file you can use the search.

Search

Enter a search string into the search box (1). The Daylite database is then being searched for files and the linked parent objects.

Results are being displayed in a clearly laid out table, grouped by search criteria (2). Each group shows up to 4 items. If there are more then 4 results per group, you can review those files by clicking **xx more...** (3).

Please note: the search results depend on the selected search criteria. In general the file's or the parent object's name (or, depending on the type, the title or subject) is being searched. To perform a full text search of documents, please refer to chapter <u>Full Text Search</u> below.

The search also supports wildcards. Use "%" (any number of characters), " " [space] (any number of characters) or "_" according to the SQL standard. The search for ho_e will find both home and hole because the underscore replaced one character. The search for ho%e will find home and hole as well as hormone.



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 <u>indexed</u> or imported using the <u>Docs2Daylite</u> 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).

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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).

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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 a apply the filter criteria

SCREENSHOT BENÃ-TIGT (Filterkrierium ausgeklappt, z.B. schon "EMails" als Filter eingefügt)

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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).

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| Forms | David Stein.vcf | Note 🖭 vcf 🧾 Local 13.07.15 | people | 💶 David Stein 🕨 🍘 Teilnehmer | |
| F I Groups | Daylite - CRM für OS X & iOS.docx | 🔇 Opp 🖹 docx 😂 Inter 09.07.15 | | L Doreen Dietrich Der Teilnehmer | |
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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).

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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 <u>search</u> and <u>filter</u> 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) <u>Preview</u> the selected file and <u>open</u> it
- (7) Compare two selected files



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 <u>chapter</u>.

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

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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

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

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

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

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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 ⌥ **alt key**. The **Library** folder will appear.

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| Schreibtisch | WebConnector.lic | 31. August 2014 11:57 | 769 Byte | C |
| Filme | | | | |
| י∕∆; Programme | | | | |
| Dokumente | | | | |
| Anleitungen | | | | |
| Geräte | 📓 Macintosh HD 🕨 🔃 Benu 🕨 🏠 basti 🕨 🛅 | Libra 🕨 📄 Appil 🕨 📄 com.marketcircle.Da | aylite4 🕨 🛅 Plugi | ins |
| | 1 von 9 ausgewählt, 69,21 | GB verfügbar | | |

7. Delete the file DayliteDocs.daylite-plugin



8. Restart Daylite