

PDF2DAYLITE FOR DAYLITE

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# General

# PDF2Daylite

## About PDF2Daylite

PDF2Daylite imports PDF files as Daylite notes so that a full text search within imported PDFs is possible thereafter. The standard Daylite search doesn't allow a full text search of PDF files.

## Features

PDF2Daylite provides the following functions:

- Import PDF files as Daylite notes (Please note: the PDF file's text needs to be searchable to begin with)
- Full text search within imported PDF files
- Original PDF file attached to note
- Save PDF file either directly within the Daylite database or as a file reference
- Move imported PDF files automatically to a preset directory

## System Requirements

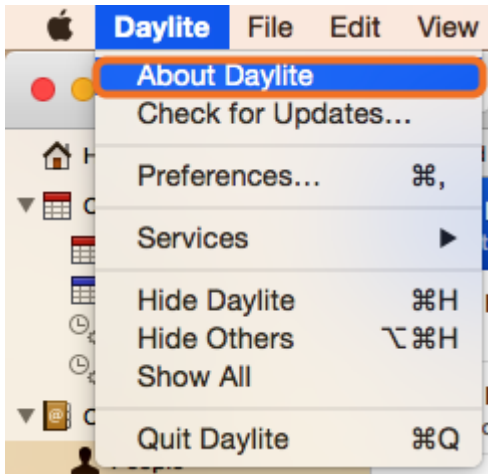
Operating System: OS X 10.8 or newer

Daylite Version: 4.3 or newer

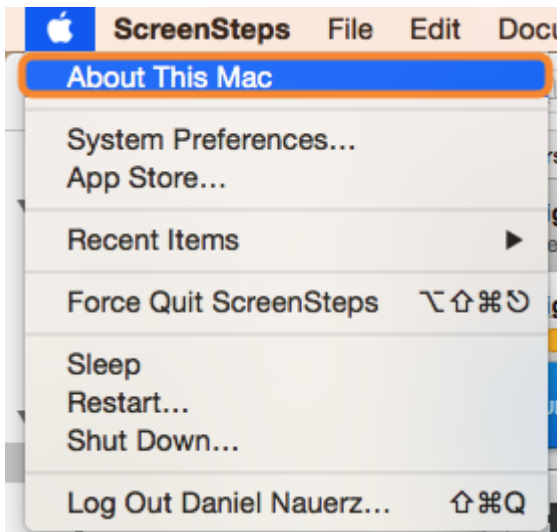
# Setup

# Installation

1. To check your Daylite version, go to the Daylite menu and select **About Daylite**. PDF2Daylite requires at least Daylite 4.3.



2. To check your OS X version, go to the Apple menu and select **About this Mac**. PDF2Daylite requires at least OS X 10.8.



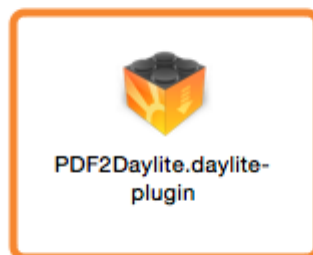
3. Double-click PDF2Daylite\_for\_Daylite.dmg.



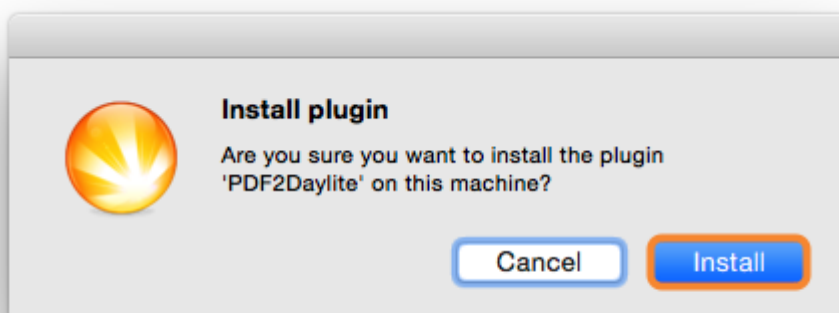
PDF2Daylite.dmg

4. Double-click PDF2Daylite.daylite-plugin.

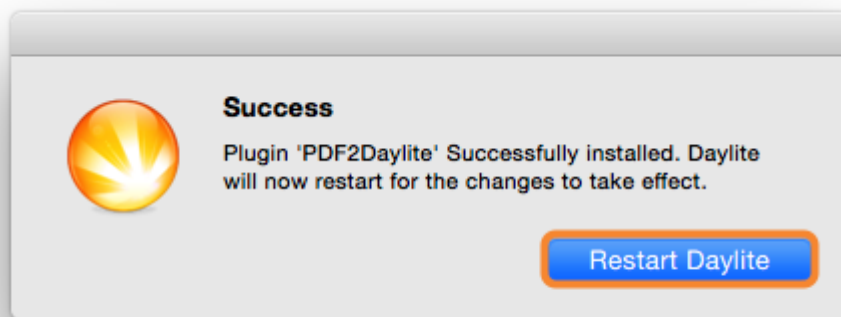
Double click to install:



5. Click Install



6. To finalize the installation click Restart Daylite



7. Please note: Beside the actual plug-in a companion app required for the PDF import has been installed on your Mac. The companion app is located in the **Applications** folder and a shortcut to it has been placed on your desktop.

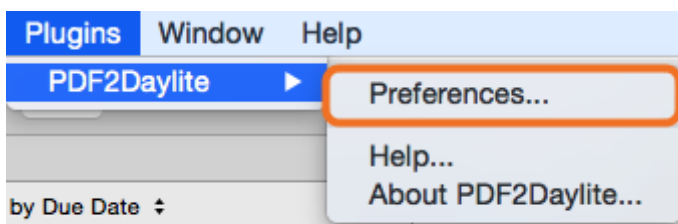
After the installation PDF2Daylite can be used for 14 days free of charge. If you would like to use it after these 14 days, please proceed to chapter '[Licensing](#)'.



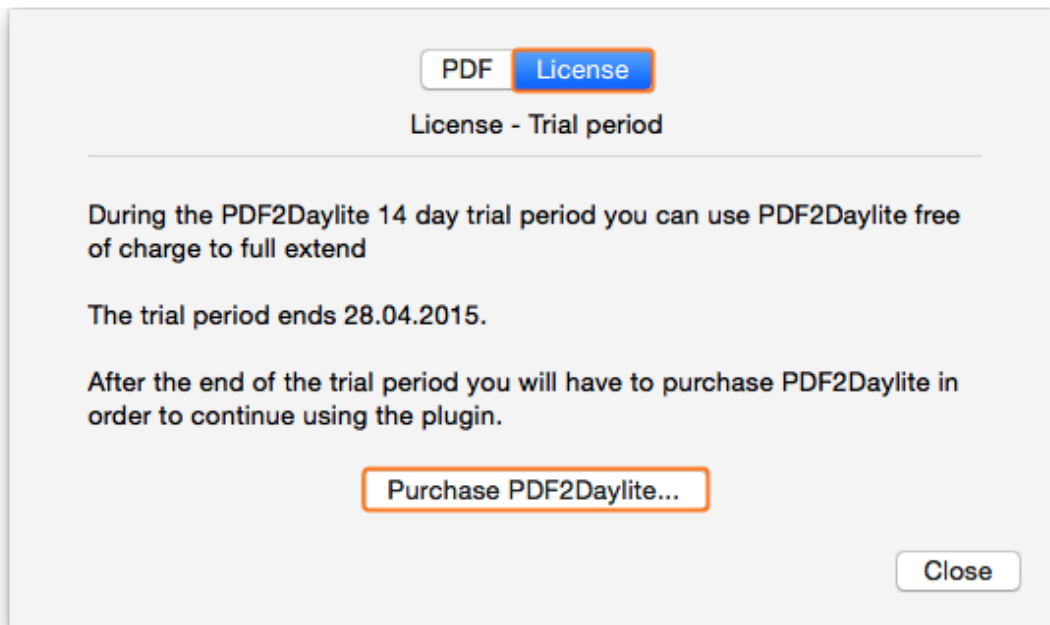
# Licensing

After the installation it is possible to test PDF2Daylite 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 PDF2Daylite, please follow these steps (given the plugin is already installed):

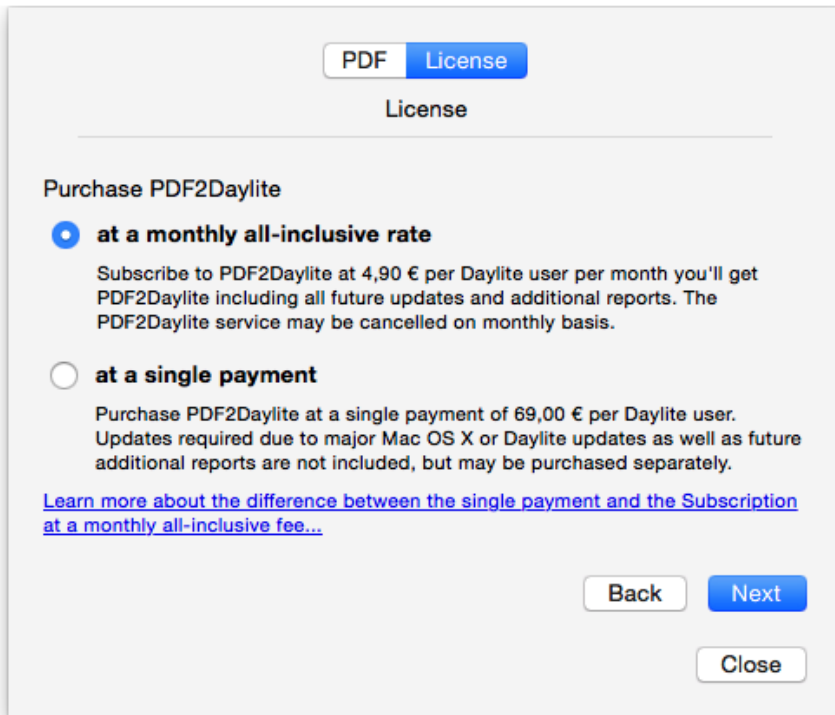
1. Start Daylite
2. In the Daylite menu select Plugins --> PDF2Daylite --> Preferences...



3. Select the License tab and click Purchase PDF2Daylite...



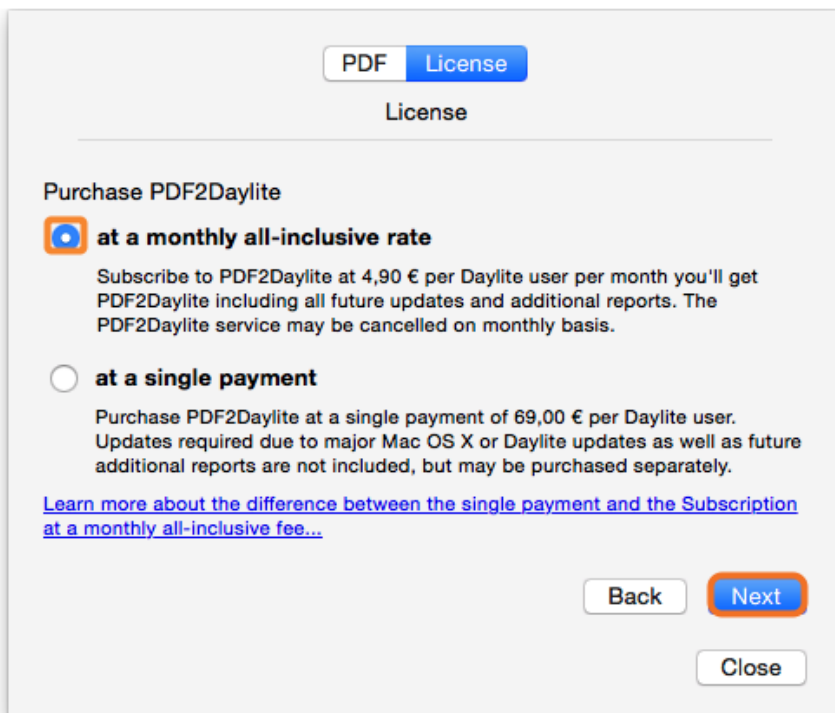
4. Select whether you would like to subscribe to PDF2Daylite as a monthly service or to purchase it at a single payment.



## PDF2Daylite Subscription

If you would like to subscribe to the PDF2Daylite, please do the following:

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



2. Enter the desired amount of licenses and accept the license agreement. Click **Next** to proceed.

The screenshot shows a dialog box titled "License" with two tabs: "PDF" and "License". The "License" tab is selected. The text inside the dialog reads: "I have 7 active users in my database", "I want 7 licenses for PDF2Daylite", and "The subscription may be updated any time and will be in effect immediately". There is a checked checkbox with the text "With the subscription of PDF2Daylite you accept our license agreement". At the bottom right, there are three buttons: "Back", "Next" (highlighted with an orange border), and "Close".

After completing all steps, a summary of your current subscription will be displayed

The screenshot shows a dialog box titled "License - Subscription" with two tabs: "PDF" and "License". The "License" tab is selected. The text inside the dialog reads: "Status: active", "User Limit 7", "Expiration date: -", and "Monthly Cost: 34,30 €". Below this, there is a section titled "Actions" with three buttons: "Manage User Assignments" (highlighted with a blue border), "Update subscription", and "Cancel subscription / Update payment method". At the bottom right, there is a "Close" button.

## Purchase PDF2Daylite

If you would like to purchase PDF2Daylite, please do the following:

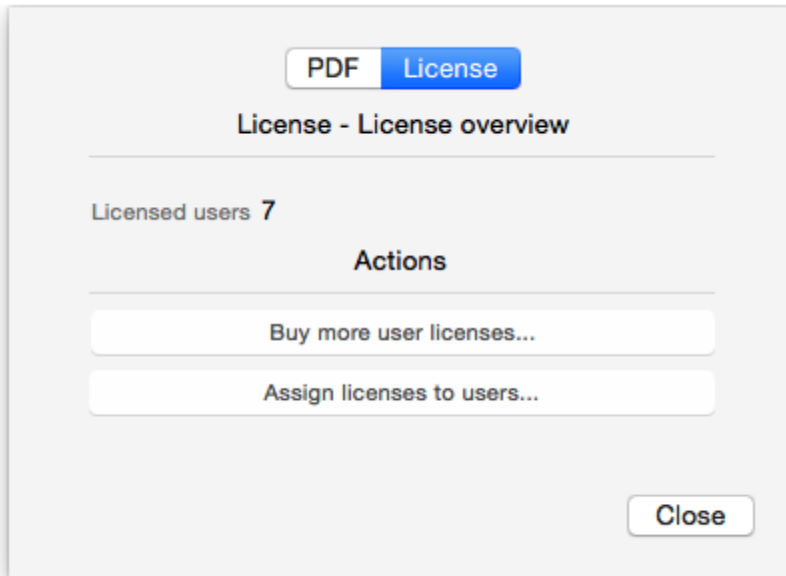
1. Click on the button at a single payment and then on Next

The screenshot shows a dialog box titled "License" with two tabs: "PDF" and "License". Under the heading "Purchase PDF2Daylite", there are two radio button options. The first option, "at a monthly all-inclusive rate", is unselected. The second option, "at a single payment", is selected and highlighted with a blue border. Below the "at a single payment" option, 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" (highlighted with a blue border), and "Close".

2. Enter the desired amount of licenses and accept the license agreement. Click Next to proceed.

The screenshot shows a dialog box titled "License" with two tabs: "PDF" and "License". The text "I have 7 active users in my database" is displayed. Below it, the text "I want 7 licenses for PDF2Daylite" is shown, with the number "7" inside a text input field highlighted by a blue border. At the bottom left, there is a checked checkbox with the text "With the subscription of PDF2Daylite you accept our license agreement". At the bottom right, there are three buttons: "Back", "Next" (highlighted with a blue border), and "Close".

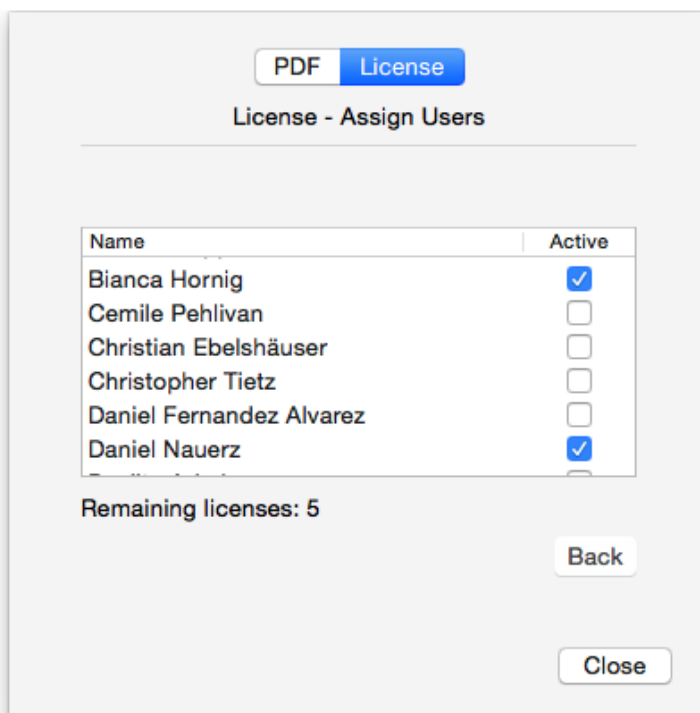
After completing all steps, a summary of your current subscription will be displayed



## Assign Licenses to Daylite Users

In order to use PDF2Daylite you need to assign the license(s) to the appropriate user(s). To do so, please click [Manage User Assignments / Assign licenses to user](#)

Assign licenses by checking the boxes accordingly. PDF2Daylite is now ready for use.



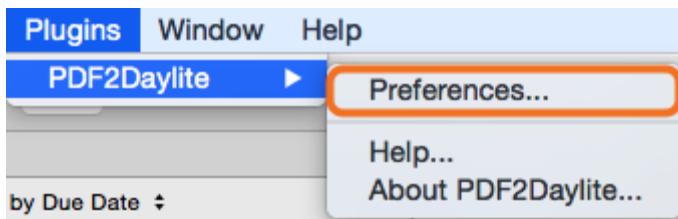
# Usage

# Configuration

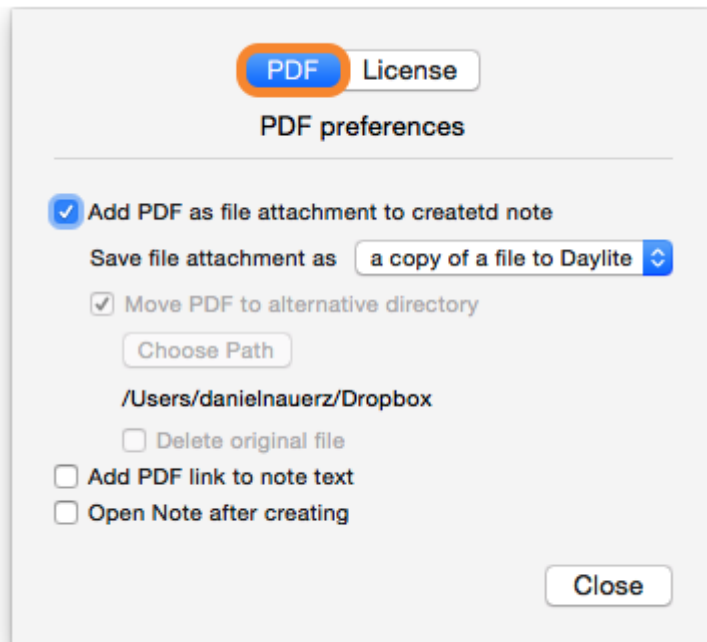
Configure various parameters of the PDF import.

## PDF Settings

1. Start Daylite
2. In the Daylite menu navigate to Plugins -> PDF2Daylite -> Preferences...



3. Select the PDF tab

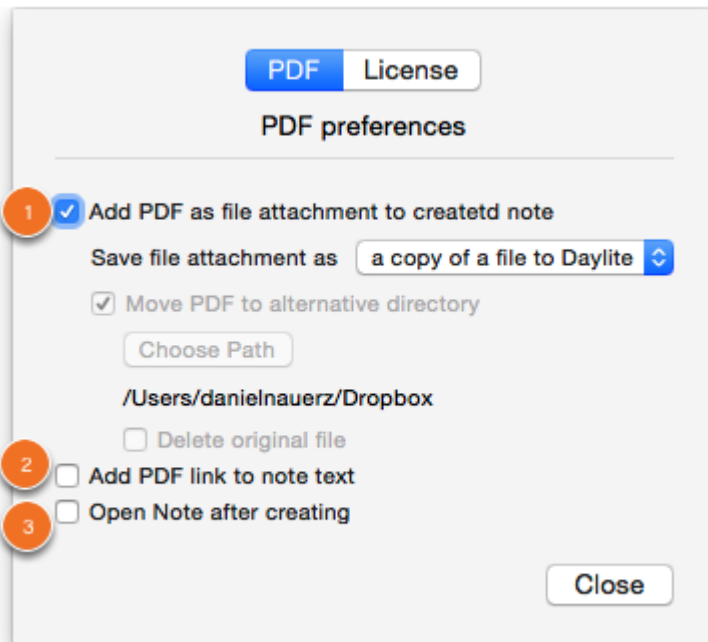


4. The following describes the basic settings:

(1) Link the attached PDF file with the note created in Daylite. More info on this topic is available in chapter [Create File Attachment](#)

(2) Add a link (icon) to the attached PDF within the body of the note. More info on this topic is available in chapter [PDF Verweis im Notiztext](#)

(3) Opens note right after its creation

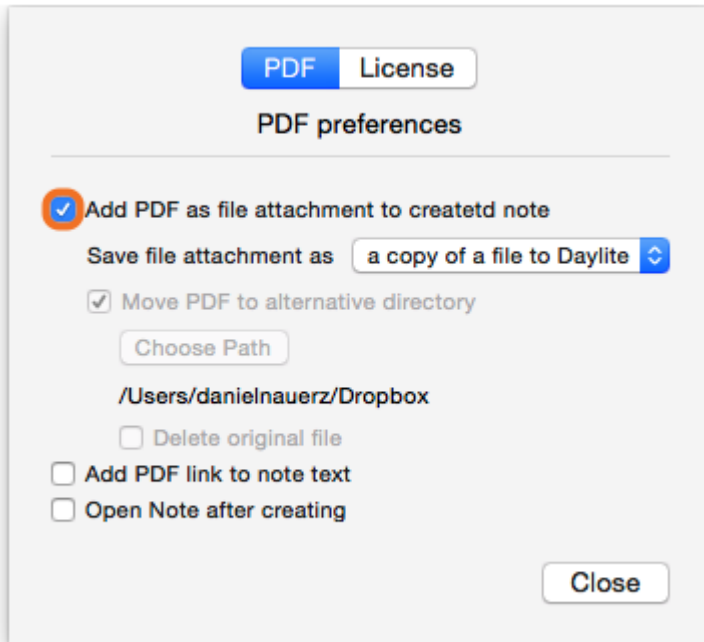


## Create File Attachment

You have the option to save the PDF file as a file attachment in Daylite and link it with the created note:

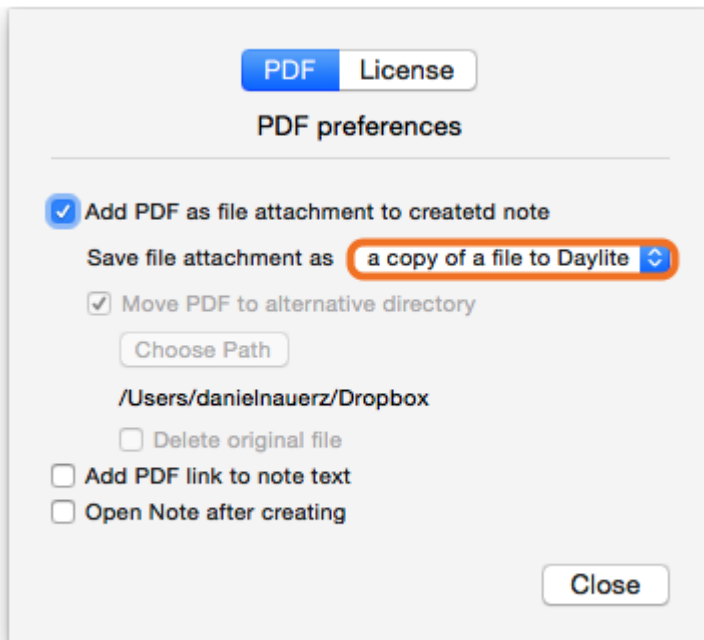
1. Check the box Add PDF as file attachment to created note





2. Select one of the following options from the drop-down menu. Follow the links below for more information on the two available options:

- (1) [File Attachment as Reference to a File](#)
- (2) [File Attachment as a Copy of a File in Daylite](#)

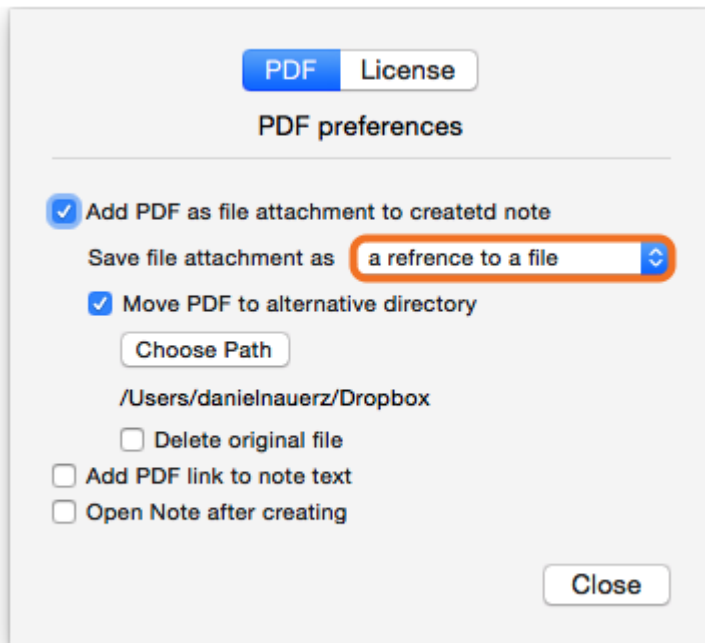


## File Attachment as a Reference to a File

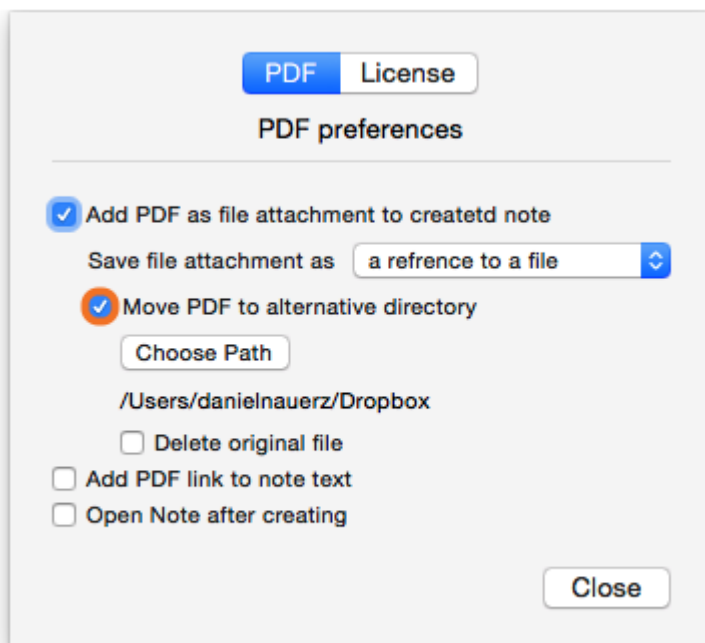
1. Select a reference to a file from the drop-down menu

In this case PDF2Daylite creates a link in Daylite to the file's current location. Please note: if this location is not a shared folder, other Daylite users won't be able to access the file. Preferably put the files in a shared folder on a file server, NAS etc.

The following steps are optional.

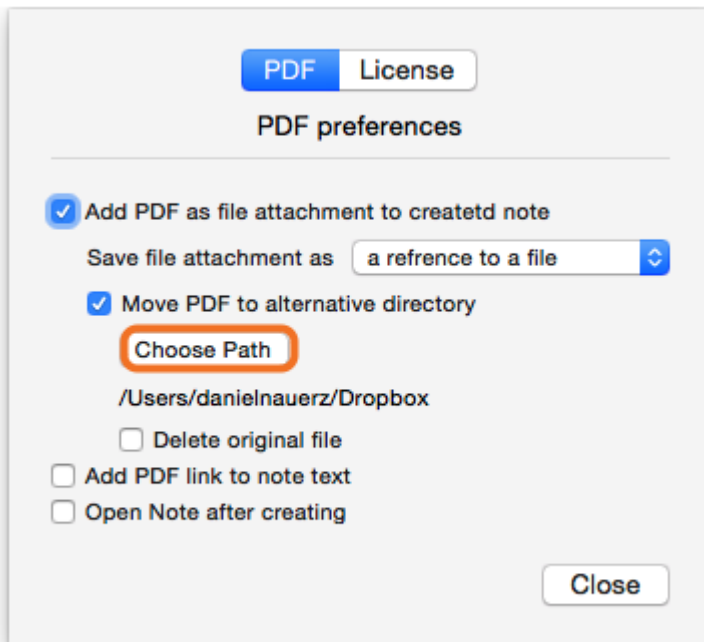


2. If you want PDF2Daylite to move the PDF to an alternative location, please check the box next to Move PDF to alternative directory accordingly.

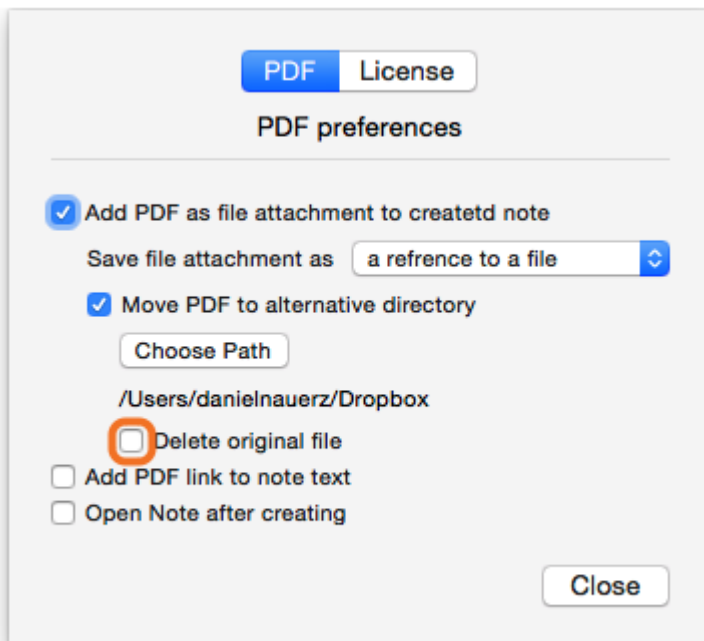


3. Click Choose Path and navigate to the desired folder.

Please note: if this location is not a shared folder, other Daylite users won't be able to access the file. Preferably put the file in a shared folder on a file server, NAS etc.



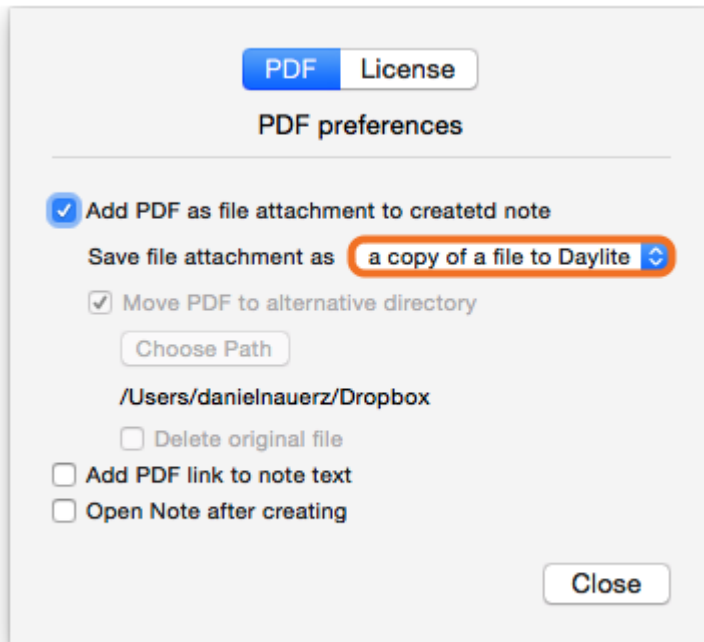
4. Check the box next to Delete original file if you would like to get rid of the original file once it has been transferred to the alternative location



## File Attachment as a Copy of the File in Daylite

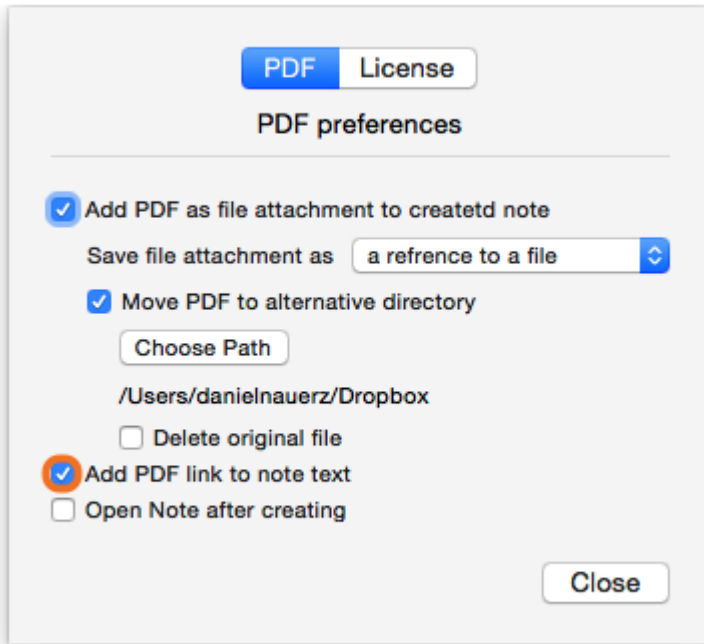
1. Select a copy of a file to Daylite from the drop-down menu

Please note: By saving copies of the PDF files in Daylite on a regular basis, depending on the amount of files, the database may become rather large. If database size is a concern, you may want to consider saving file attachments [as a reference to a file](#).

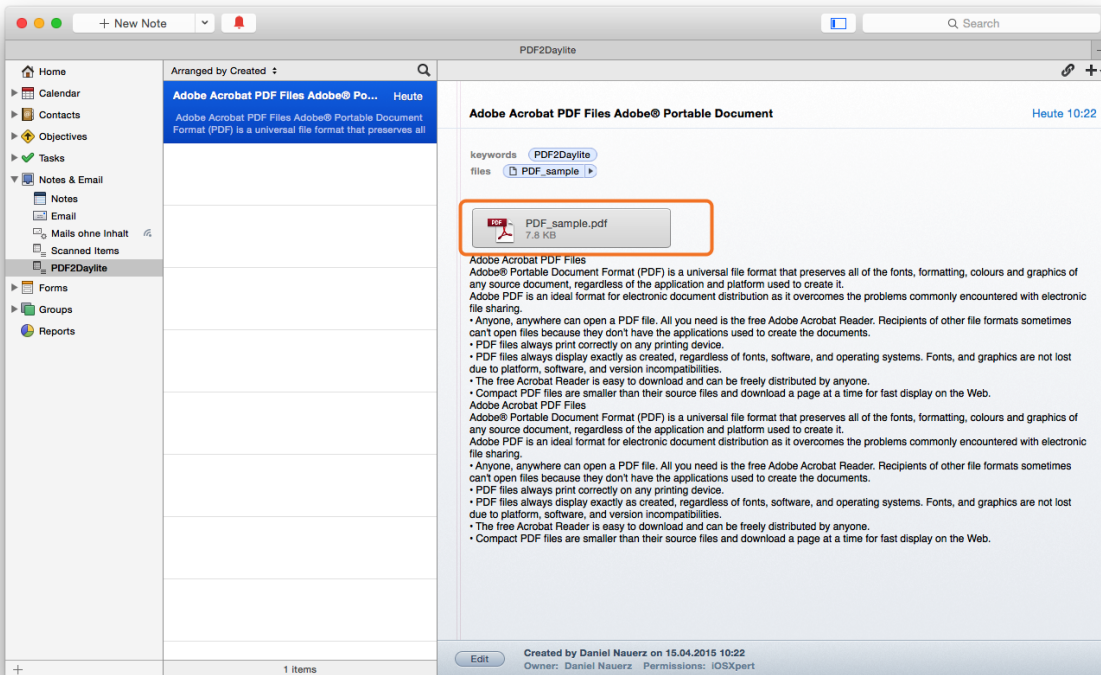


## Add PDF Link to the Body of the Note

If you would like to add a link (icon) to the attached PDF within the body of the note, check the box next to Add PDF link to note text accordingly.



The link and icon appear as shown below:

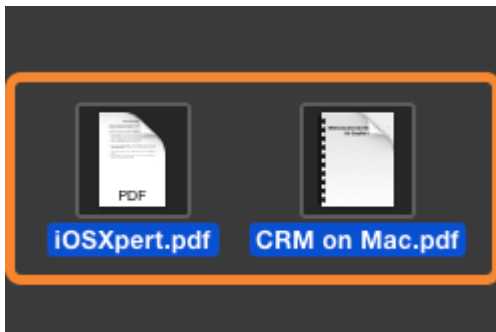


# Importing PDF Files

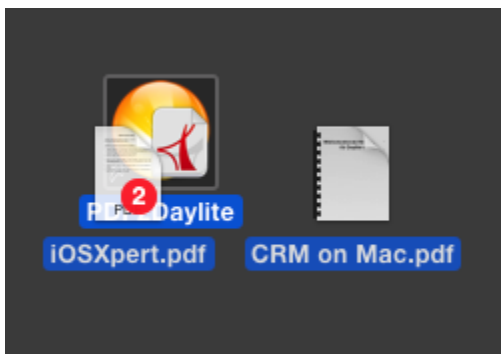
In order to import PDF files to Daylite you need to drag & drop the desired file(s) onto the PDF2Daylite companion app icon. The app/icon is located on the desktop and/or your Mac's Applications folder.

**Please note: the PDF's text needs to be searchable (you need to be able to copy & paste the text) in order to allow PDF2Daylite to transfer the text into a note in Daylite!**

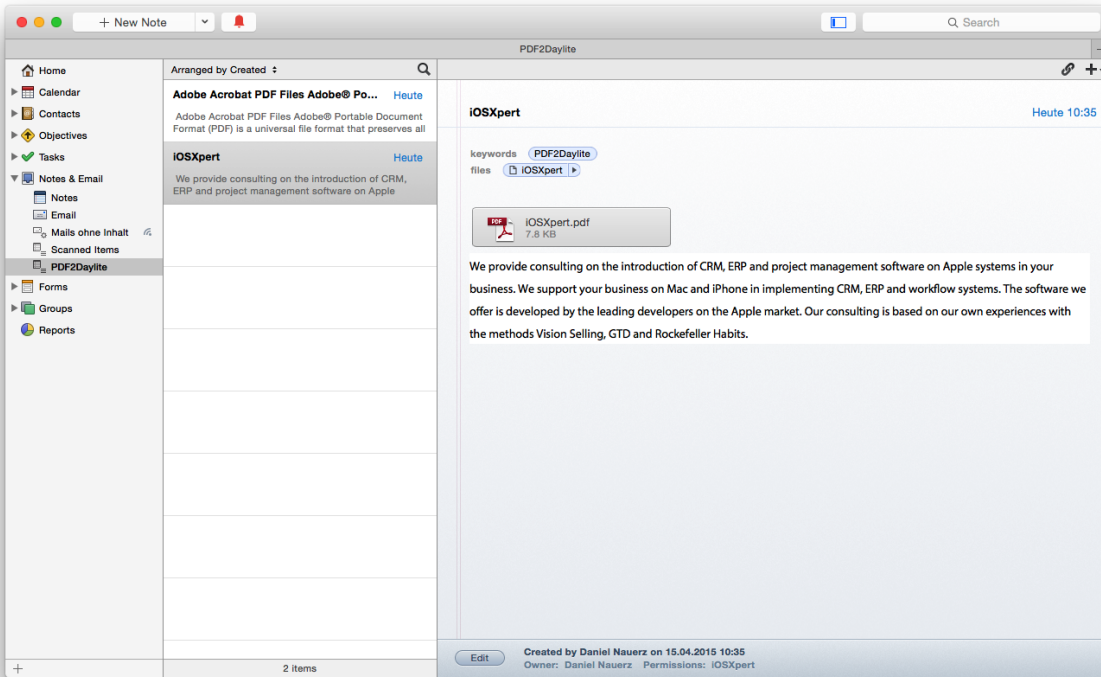
1. Select the PDF file(s) you want to import



2. Drag & drop the file(s) onto the PDF2Daylite companion app icon on the desktop or in the Applications folder



3. The PDF files have been imported to Daylite according to your settings



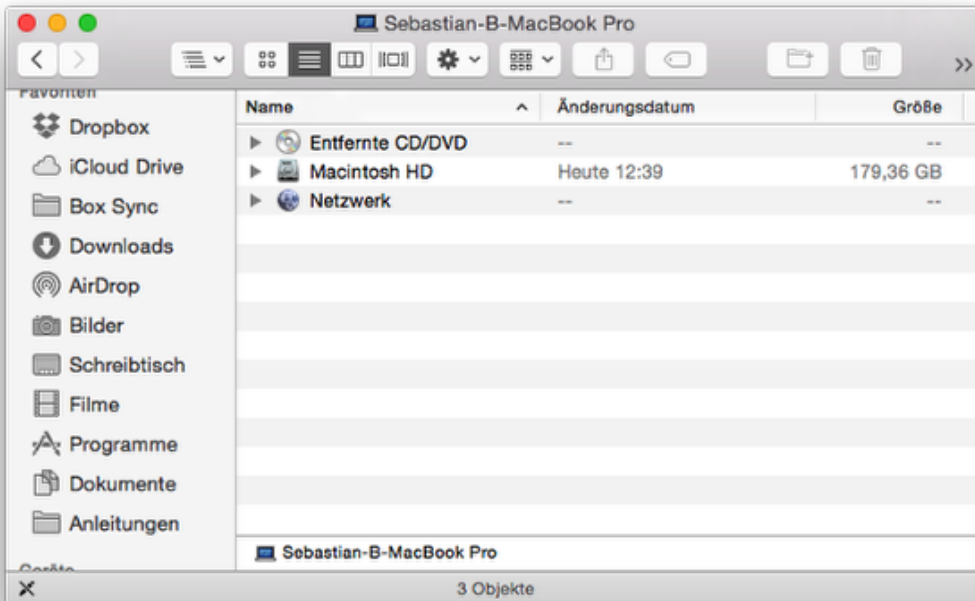
# Miscellaneous



# Removing the Plug-in

Follow these steps to deinstall a Daylite plugin

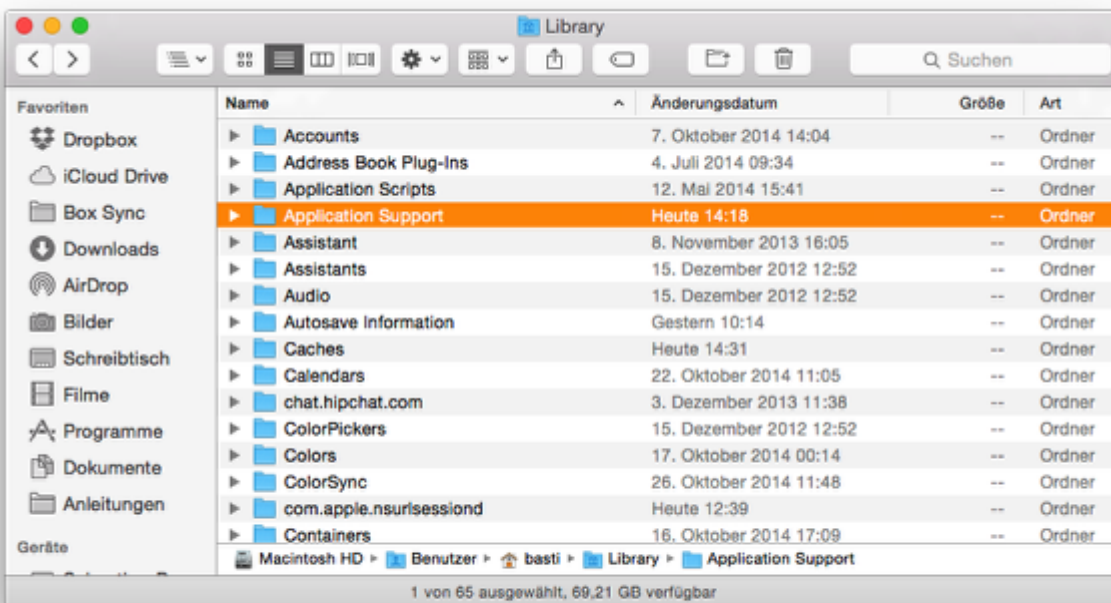
## 1. Open Finder



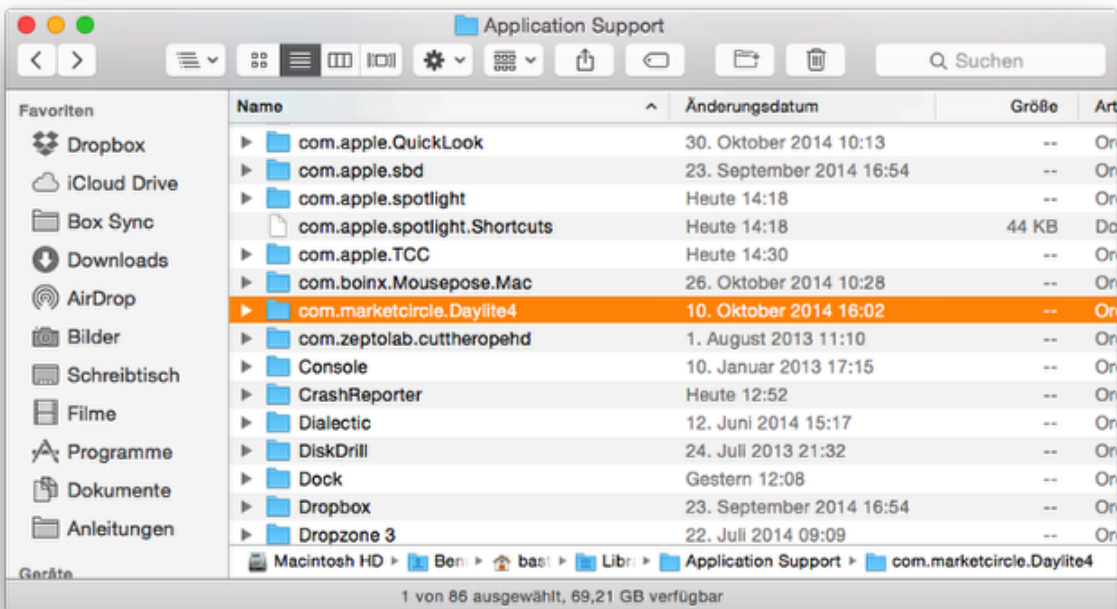
## 2. In the menu bar select Go and hold down the $\text{⌘}$ alt key. The Library folder will appear



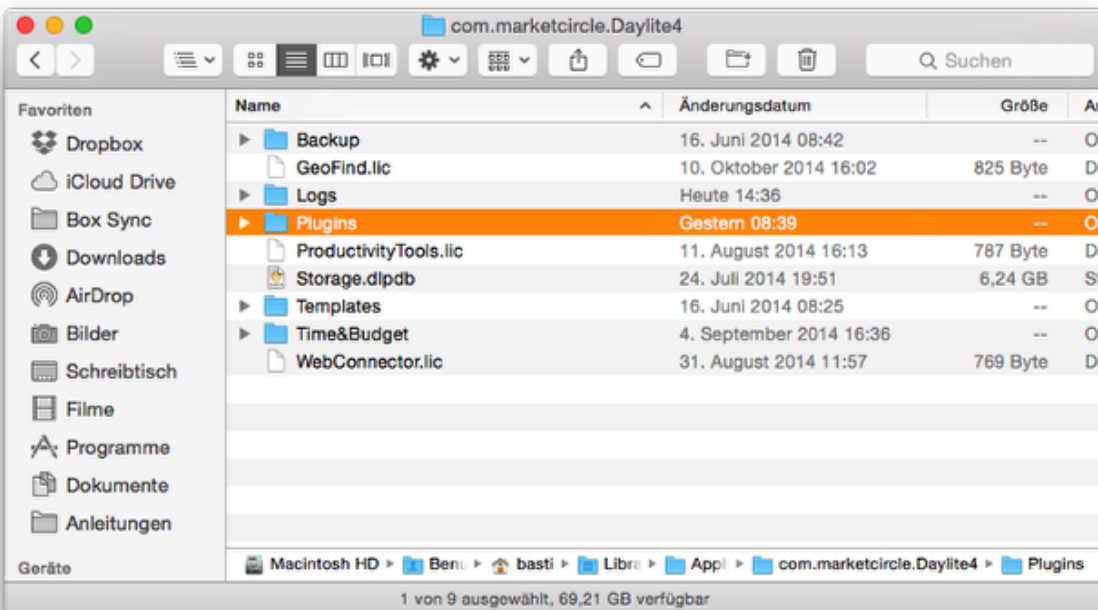
4. Navigate to the folder Application Support ->



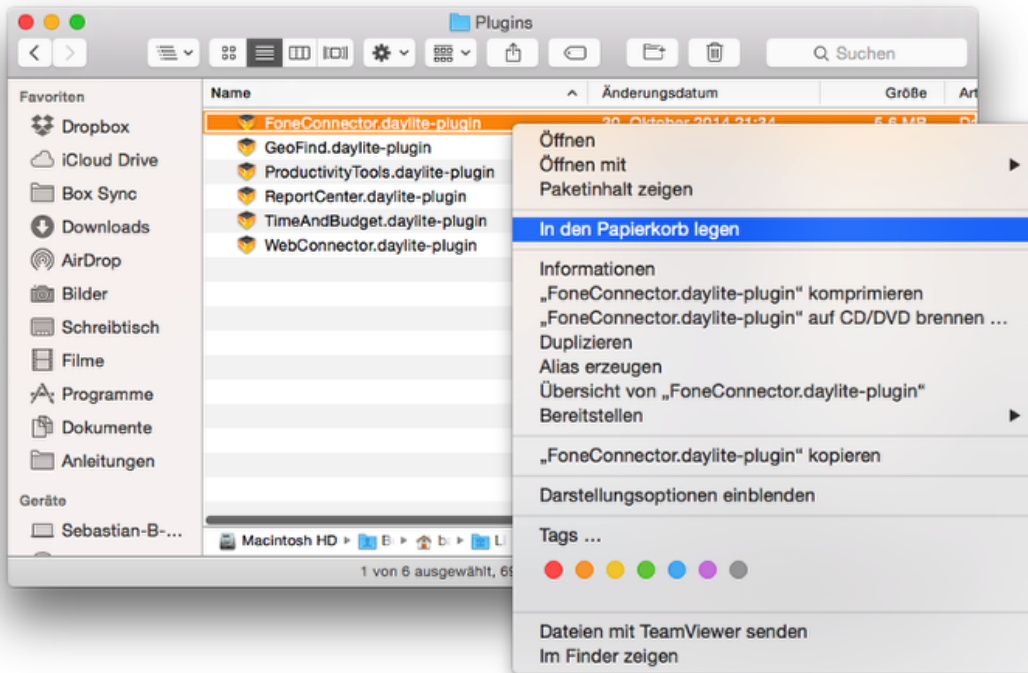
5. -> com.marketcircle.Daylite4 ->



## 6. -> Plugins



## 7. Delete the file PDF2Daylite.daylite-plugin



## 8. Restart Daylite