# Yep

Manage documents.

Contents

Preface: Welcome to Yep

Yep helps you **see**, **create**, **organize** and **find** your documents. Think of documents as the files that you care about.

To get started with Yep, simply launch it. Yep will automatically start tracking all the PDF, Office and iWork documents in your Documents, Desktop and Downloads folder on your computer. You don't have to move the documents you want to manage anywhere - Yep can manage documents in any location on your computer.

See documents

Yep shows your documents in a view not unlike iPhoto - this allows you to pick out documents using visual cues like the layout or color, etc. Yep also has a list view. You change view modes with the three buttons in the toolbar. You can sort the items by many criteria including name, modification date, etc. The middle button 'grouped view' shows items organized into groups based on the sorting you choose.
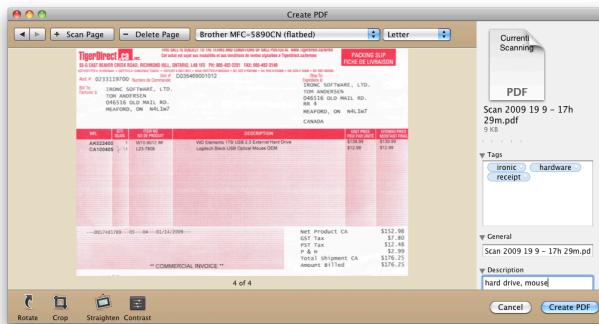
Create documents

Yep has a great scanner interface that allows you to make multipage PDFs from your paper documents in as few clicks as possible. Want to create a quick note with some selected text from a web page? Just drag it into Yep - a file containing any dragged text and images is automatically created, named and filed, all without typing anything in one step. Yep can create image files from dragged in images, and you can copy important emails from Apple's Mail program into Yep with a simple drag.

Organize documents

When you file a paper document into a filing cabinet, there is always the question of 'where do I file it'? Many documents have more than one good place to be filed to - should that waterproof tent idea I wrote a note on be filed under 'ideas'? or under Sept 2009? or under 'camping'?. The advent of computers has been a great boon to finding

'stuff' - but unfortunately the 'filing cabinet' paradigm still exists on our computers. Yep breaks through that with the use of tags - when you tag a document, the actual location of it becomes less important. Searches in Yep or in the Finder for the term 'camping' will show this document. Plus Yep shows a 'tag cloud' which allows you to quickly pick out groups of related documents.

Yep includes an filing cabinet that automatically files documents you create in a simple date based hierarchy.

Yep stores no database, and all items in Yep are simply real files residing on your computer, available and searchable with the Finder. One goal of Yep was to not impose restrictions on moving or editing files - Yep tracks them wherever they lay.
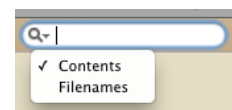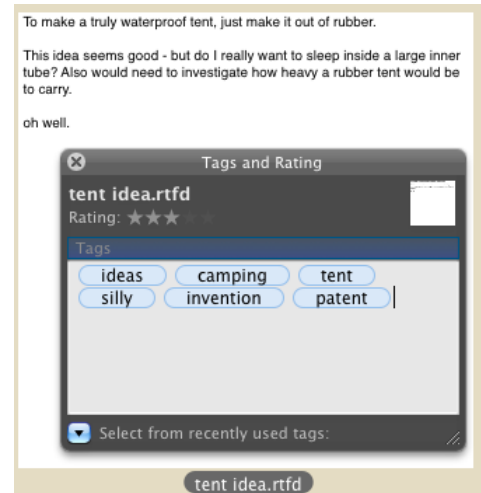
Filed Documents
The Filed Documents folder is a 'catch all' folder that Yep creates in your Documents folder. It is organized by Year/Month/day and stores documents that have been auto filed.

The modern workday for many of us is an avalanche of information - emails, documents, web pages and more fly through our lives. Much of the information that we would perhaps like to save does not get saved, usually due to fact that the act of saving a document, then deciding a name and filing location for it, dragging the file to that location, etc - is just too much of a disruption to our work flow. So it does not get done. That's where Filed Documents comes in. You can, with one or two clicks and no typing archive a web page into Yep's Filed Documents folder. Or drag a file into Yep from your desktop, to file it into today's Filed Documents folder. This strategy allows you to keep a time oriented archive of your activity, with tagging and allowing like documents to be grouped together. Drag a text snippet from a web page into Yep to create an automatically named text file filed under today.

Find and Search
Yep allows rapid point and click searching, content searching and more. You can create bookmarks for often performed searches. You can organize bookmarks. Dragging files to bookmarks will move and or add tags to the documents. The search window is at the near the top of the main window, in the 'crumb trail' bar. The crumb trail bar shows you at a glance exactly what documents you are currently viewing. The search window can be used to perform 'all' or contents searching, or it can be limited to a filename search.

Chapter 1: Initial setup

If you are new to Yep, on startup you will see all the the PDF, Office and iWork documents, along with any OpenMeta tagged documents in the main Yep window.

By default, Yep will automatically 'mark as managed' any files it finds in your Documents, Downloads, and Desktop folders that are PDF, Office, or iWork files. You can also drag files of any type into Yep in order to have Yep track and manage them.

You can change these settings in the preferences:
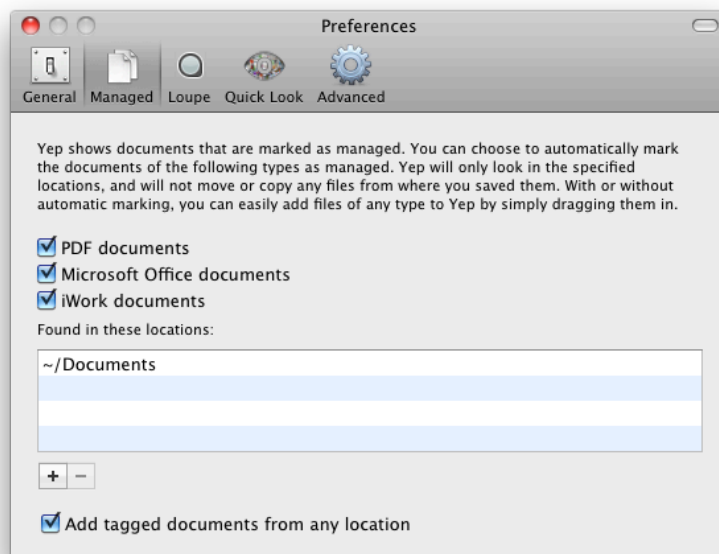
Once imported into Yep a document stays in Yep until you explicitly remove it. The preferences shown here control how Yep adds documents to the collection you are managing. For example, turning everything 'off' in these preferences will not remove any documents from Yep. Remember that Yep can work with files of any type – you only need to drag them into Yep in order to add them.

Upgrading from Yep 1:

The initial import of Yep version 1 data into Yep 2 will not alter any data or settings for Yep 1.

Yep 2 stores auto filed documents in a folder hierarchy called 'Filed Documents'. This is similar to the 'Yep Documents' folders of Yep 1, but there are some differences: Notably, Filed Documents uses a numerical date based folder hierarchy that goes down to the day, where 'Yep Documents' only filed PDFs month by month. We could not figure out a reliable way to automatically move your 'Yep Documents' folder into the Filed Documents folder, so we chose to leave it alone. Of course any PDF located in the Yep Documents folder will be seen by Yep 2. One way to deal with this is to move the PDFs from your Yep Documents using the Finder, in any way you see fit. If you want to leave the documents alone, that is not a problem – Yep can manage documents in any location.

Tags and importing from Yep 1:

Document tags set in Yep 1 will be added to any OpenMeta tags already on the files. Again, your Yep 1 files are treated as read – only. Authors are converted into tags of the form 'author:James', etc. This change allows multiple authors to be set on a document in Yep 2, and also allows easy clicks in the Tag cloud to select all the documents by a given author.

Yep 1 stored information about all the tagged documents on a per volume basis – that means that the tags database that Yep 1 used is stored in a file on each volume that PDFs were being tracked on. On the intitial startup of Yep 2, all currently mounted volumes are scanned for Yep 1 database files, and the upgrade is performed. If you at any time wish to re – import data from an old Yep 1 database file, you can use the 'Restore Metadata…" command from the File menu, and then pick an appropriate 'docInfo.plist.gz" file from a Yep 1 Application Support folder.

Chapter 2: See documents

This chapter details all the ways in which you can view, open and get information about documents.

Documents View
The main document view in Yep shows the results of the current search. Documents are sorted with the sort menu, and can be viewed in three ways:

- as thumbnails - with tags and ratings shown below each item. You can set ratings on your documents by simply dragging some stars under a document.

- as grouped thumbnails - documents are grouped according to the sort method. For instance when sorted by file size, files are added to a handful of groups
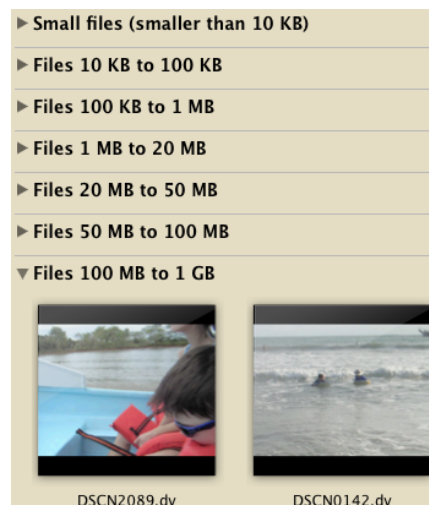
- as a list view - columns can be turned on and off in the column header. Note that the columns that you have turned on here also affects the columns in both the printing and exporting of search results.
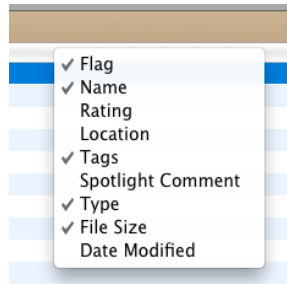
Info Windows

Yep has a button in the toolbar that turns on and off an info area on the right side of the main window. With this on, each item you select will display some information about itself. If you select multiple items in Yep, you are able to add tags to all of them at once using this info panel.

You can also bring up a floating info window that does NOT change documents when clicked on by using the right - click contextual pop up menu.

The 'Copy to Clipboard' item in the info window will copy much more information than is shown - use this to dig into the details of a file.

Loupe - Magnifying glass

In Yep this is referred to as the Loupe, it is a tool that you can use to examine details of files. In Yep's preferences you can find some options that control its use. By default, you can bring up the loupe by holding down the option key. When Yep is showing list view, the loupe shows the entire document, which can be nicer than bringing up Quick Look for each file you might be interested in.
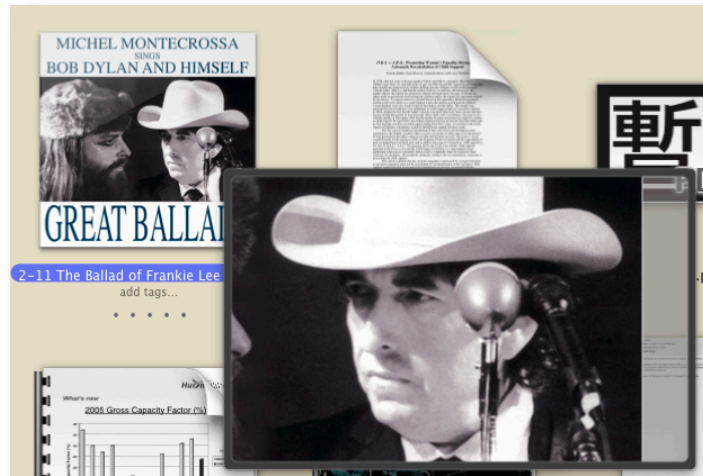
QuickLook

By selecting one or more items in Yep, then pressing the space bar, you can bring up the Quick Look window for the selected document. This is the standard Quick Look window, having full screen mode, and more. In OS X version 10.6 and later the QuickLook window performs better and more smoothly.

Right-click menu
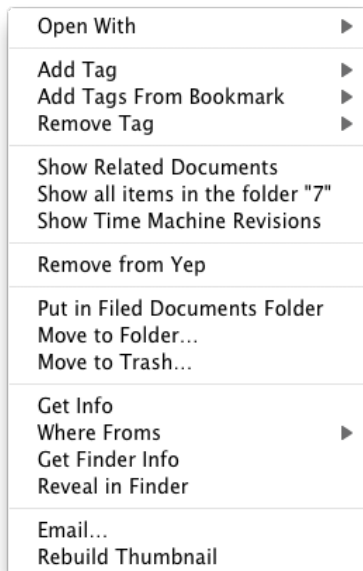
When you right click on a document, Yep shows you a menu of things you might like to do:

Open With: pick an application to open the file.

Add Tag: add a recently used tag

Add Tags From Bookmark: If any of your bookmarks have multiple tags, you can use this to add them all at once.

Show Time Machine Revisions: Yep will look through your time machine backups for all revisions of the selected document. This is useful to look for an older version of a document you have been editing. If you use a Time Capsule, you will need to mount the sparse bundle first.

Remove from Yep: Simply marks the file as 'not managed' and does not remove or even move the file.

Where Froms: Items downloaded from the internet using Safari will often have a 'Where From' set on them that is a URL of the items origin. You can open any URLs with this menu.

Opening

To open a document in Yep, double click it. This will launch the default application to open the file. If you would like to set a different application to open a certain file type, then use the 'Open With >" item from the right click menu once. Yep remembers this and uses your chosen application the next time you double click.

You can also of course drag a document to the dock in order to open an item with the selected application.

Printing

There are two things to print in Yep. Perhaps the most common thing to print is a document or group of documents.

Printing a document

You can quickly print a document by selecting it and using the 'Command - P' key sequence, or by using the File menu | Print Selected. This prints the document by launching the default application for the document, and then printing right away, without any print dialog. To get more control, open the document by double clicking it, then print from whatever application you are using.

Printing search results

Sometimes you may desire a print out of a listing of Yep's current search results. Yep does this using an html table - Yep prints a list of the documents in the current search, with columns given by those that are currently active in list mode.

Constitution.pdf		PDF document	464 KB
Contract Discussion Points.doc		Word (doc)	25 KB
Contract scan.pdf	invoice contract	PDF document	1.9 MB
Cracked Heat Exchanger		.webloc files	0.1 KB
Cracked Heat Exchanger Scotty McGregor HVAC Oracl.rtfd	testingYEP1ToYep2	Rich text (RTF) with attachments	--
Cracked Heat Exchanger.pdf		PDF document	260 KB

Chapter 3: Create documents

This chapter details all the ways in which you can scan and create documents .

Scanning

Getting to a paperless or even a 'less paperless' office in today's world involves scanning. There are two main ways to scan documents into Yep - using your scanners software to create files, or using Yep's scanning interface to create PDFs.

Scanning using Yep

Yep has a scanning system tuned for document management. When using a scanner with Yep, settings are such that the resulting scanned document is of a high quality and reasonable file size. To use Yep to scan with your scanner, make sure all scanner software has been installed, and your scanner turned on, etc, then press the

[Scan New Document] Scan New Document button. Yep brings up its scanner interface. If you have more than one scanner, or a scanner with more than one input option, use the menu to pick which scanner you would like to use, then (only on OS X 10.6 or later) pick the paper size you are using. For flatbed scanners, picking 'All' will scan the entire flatbed.

With the paper in the scanner press the 'Scan Page' button.
Two notes for OS 10.6 or later: Note that with a sheet fed scanner, you only have to press the 'Scan Page' button once, all the pages in the hopper will be scanned. Duplex scanning is supported if the scanner has that feature.

As soon as the scanner begins to scan, you can start tagging, naming, and adding notes about your scan - saving you valuable time.

You can use the crop, straighten and contrast buttons to improve the look of any page of your scans.
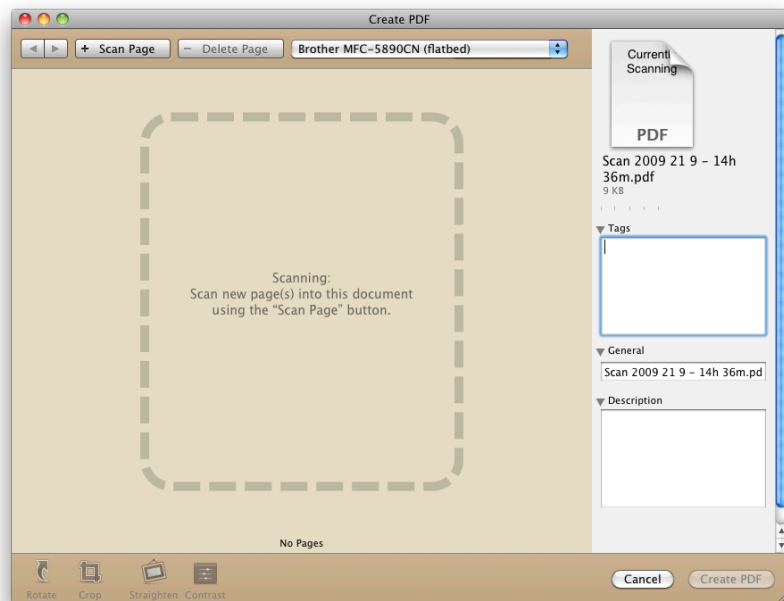
If you are working on a large scanning job and you are called away from your computer, forgetting to complete the scan, perhaps even quitting Yep, the next time you start to scan any scans not made into a PDF will still be in the Scanning window, ready to

continue. You can erase all pages of a current scan by clicking the 'Cancel' button at the bottom of the window.

Scanning using external scanning software
If you would like to scan using software other than Yep, it is still quite easy for you to integrate your scans into Yep. A few possible workflows:

• set up your scanning software to create PDFs (or jpegs, etc) and dump them into the root of the Filed Documents folder. When you switch over to Yep, Yep will automatically file the documents into todays folder and mark the files as managed, leaving you to add any desired tags, etc.

• after creating a document with your scanner software, drag the resulting document into Yep to have Yep keep track of it.

• use Preview to scan photos into jpeg or tiff images. Yep's built in scanning creates 300 dpi multipage PDF documents.

Dragging in text and images
If you drag text from a web page into the Finder, a kind of document called a 'text clipping' is created. While these documents have their uses, they have limitations. When you drag text into Yep (or into Yep's dropzone), a more standard rtf or rtfd file is created with the contents of your drag, auto named, and put into today's Filed Documents. If you drag an image in, the image is saved to today's documents with the correct file name.

Dragging in urls (web links)
Dragging a link to a web page, etc into Yep will result in a webloc file being created in today's folder. You can use this to create a daily trail of interesting sites visited.

Dragging in emails
When dragging an email from Apple's Mail.app into Yep, Yep makes a copy of the email in today's files, and names the file to reflect the subject of the email. The thought here is that important emails can be added to your collection of files. I find that although I 'keep' all email it seems that emails older than a few years are simply not available, due to email account changes, etc. Keeping an archive of important emails can be useful. Attachments are stored with the email.

Dragging in files
When you drag in files to Yep, if the files are not managed, Yep offers to manage the files, or move the files to today's folder, (which also marks the files as managed). If you drag a file that is already managed into Yep, Yep simply selects the file. If you drag in a file from a read only volume like a CD-ROM, etc, then Yep will have to copy the file to today's documents in order to make it managed.

Chapter 4: Organize

This chapter details how you can use Yep to tag and file your documents.

Adding Tags

Tags window

If you select a document and press the 'enter' key a tag entry window appears, allowing you to enter tags for the document. Tags are short descriptive words about documents. By spending a few seconds tagging a document, you enable easier retrieval at a later date. There is a list of recent tags you can access with a button at the bottom of the tagging area. The recent tags list begins with the tags that are entered into the preferences, 'General' tab.

You can also set a 1 - 5 star rating with this window.

Two word tags

When typing tags in Yep, pressing the spacebar takes you on to the next tag. You type two word tags in one of two ways: You can put them in quotes, ie "two words" or you can type %20 instead of a space. Eg: two%20words will become a two word tag 'two words'.

Other ways to add tags

You can drag a document up to the bookmarks bar: If a bookmark has tags set you can add them by dropping the file onto the bookmark. Note that if the bookmark has a location the document will also be moved to that location. When you drag to a bookmark, Yep tells you what it will do.

You can drag a document to the right side of the bookmarks bar, where there are some bookmarks in a menu called 'Tag'. This is a list of all the recent tagging operations that you have done, so you can save time by dragging to this menu, and then picking the group of tags that you would like to add. This can be a real time saver for repetitive tasks. You drag to the top of the menu then pick the tags you want to add.
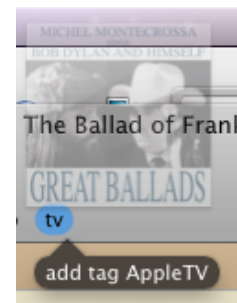
Adding tags to multiple documents

You can select more than one document in Yep, then press the enter key to add tags to multiple documents at once.

When multiple files are selected, only tags common to all documents are edited. So this is primarily for adding tags.
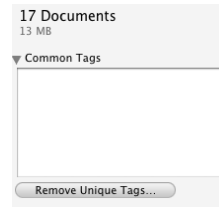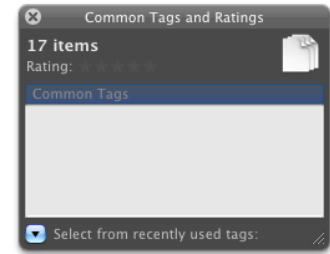
Removing all tags from multiple documents

If you select multiple documents, and want to remove all the tags on them, then use the info window, and then press the 'Remove Unique Tags" button. Yep will confirm your decision, then remove all the various tags from all the selected documents.

Deleting a tag

If there is a certain tag that you want to remove from any document it might be in, then in the 'tag cloud' panel, right click on the tag and pick 'Delete…' from the menu. Yep will confirm your actions, then delete the tag from all documents it can find that have that tag. Note that the tag may exist on files on other currently unmounted volumes. When deleting a tag from a lot of documents (like 100 or more), Yep will finish the job in a reasonable time, but it may take a while for the Spotlight database to catch up, during which time searches for the tag may give false positive results.
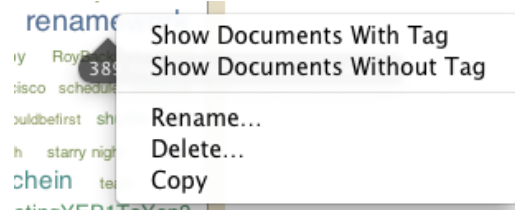
Filing

The standard OS X save as dialog is slow, and often interferes with the flow of your work. With Yep you can file things quickly and efficiently. Here are some tips:

Drag to a bookmark to file a document to that location. Not all bookmarks have suitable locations, only bookmarks with locations will light up when you drag over them. Use the option key to copy the file to the destination location.

Drag to the 'File' bookmark menu to access recently used destination folders.

Use the contextual pop - up menu to file a document to an arbitrary location. This will bring up the 'slow' folder picker - but remember the 'File' bookmark will then have that location in it.

Organize your files without using Yep, but rather using the Finder, Path Finder, etc. Yep can manage files in any location. Move them around using any way possible.

Move a file to today's Filed Documents folder by using the button in the info window, or the right click menu.

In the Finder, drag the Filed Documents folder to the documents section of the dock: then simply drag any file you want filed to today into there, whether Yep is running or not.

If Yep is running, but you are in another application, like Preview, TexEdit, etc, you can drag the little icon at the top of the document into Yep's dropzone.

eg: drag the little icon as shown here:
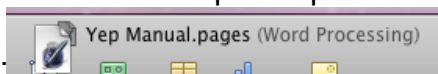
over to the drop zone. You can also choose to tag the document if you wish.

The Drop Zone
When Yep is running there is a small window that is turned on by default (see the preferences for options) that allows you to add documents to Yep easily. The drop zone has 3 zones - you can 'File' which puts the document into today's files, you can 'Tag' - which tags the file and marks it managed, leaving it in place, or you can simply 'Add' the file to Yep, leaving it in place.

If you find yourself using the drop zone a lot, you can adjust the preferences so that the window is still there - only its completely hidden. You can also move the drop zone from left to right by dragging it all the way over your monitor to the other side.

Bookmarks
Bookmarks are saved searches. Yep has some built in bookmarks that can't be deleted, plus you can add your own. Bookmarks can be organized into folders (including the built in ones).

Organize bookmarks with the little button at the left of the bookmark bar:

You create bookmark folders in the Bookmark menu in the main menu. If there are some built in bookmarks that you don't need but are using up room, relocate them to a folder.

Chapter 5: Find

The 'crumb trail' bar in Yep always shows the current search criteria, and how many files are in the current search results, etc.

First - an example step by step search:

The default search in Yep is the 'All' search - upon startup Yep will simply show all managed files it can find. Looking at the above crumb trail, Yep is looking for managed files of 'Any' type in 'Anywhere' with any rating.
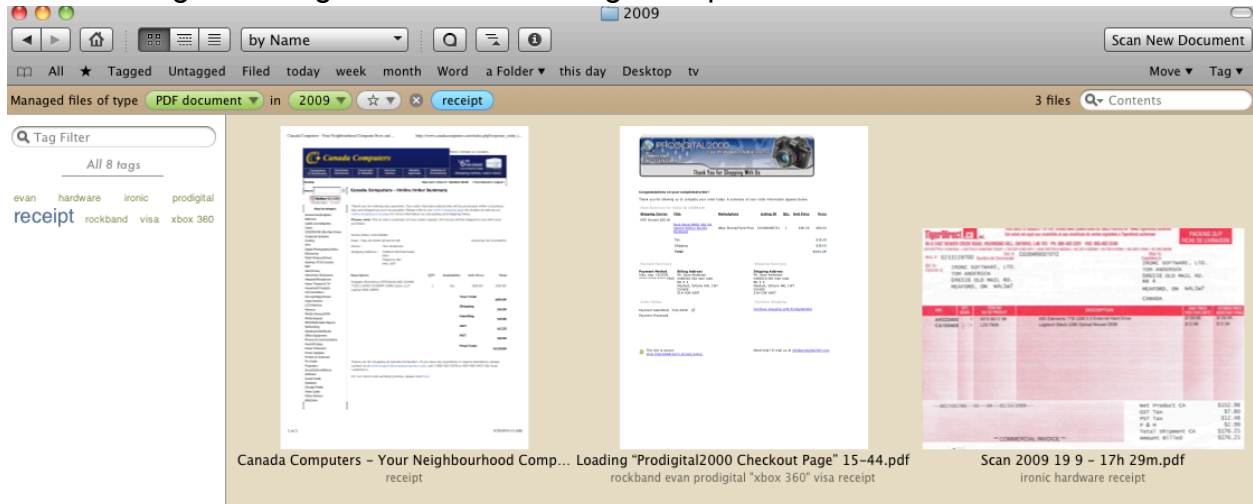
If you would like to narrow down your search to for instance only show PDF files, you can use the file type menu to pick PDF: In this case I have almost 4000 PDFs that will be shown.
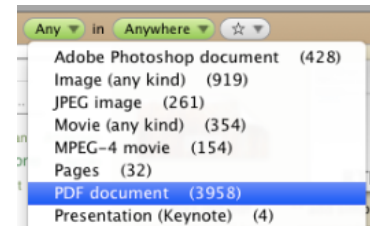
Next I decide that I only want to see the 2009 PDFs from my filed documents - down to 147 documents:
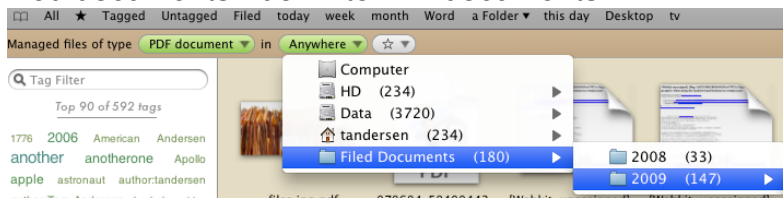
Then looking at the tag cloud - I see the tag 'receipt' - click on that to cut the search to 3

That search took about 5 mouse clicks and no typing, finding the document was easy once I could see it.

Default search
Yep does a default search on startup and whenever you hit the 'home' button. You can set the default search with the File menu - 'Set Current Search as Default' menu item.
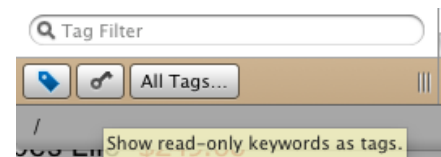
Tag Cloud
The tag cloud shows all the tags set on documents in the current search results, so the contents of this window change to show you the most popular tags of the current search. If you know the name of a tag, even the first letter, typing it into the tag filter can help you find it.
The 'All tags' window shows all the tags for the current search only to really see ALL the tags, do a search by using the 'All' bookmark, then press the 'All Tags…' button.

Tags vs Keywords
There are two little icons at the bottom of the tags window. The one on the left controls the display of tags - the tags that you have set on your documents, while pressing the keywords button turns on keywords, displaying keywords found inside documents.
Keywords are what Yep calls tags that have been set perhaps by the original author of the document. A good example of a file having keywords is an jpg image downloaded from a stock photo service. Images like this will often have 20 or more keywords set on them describing the document. Turning on keywords thus opens up more information about the documents you are looking at, but the keywords set on a file can not be edited by Yep. Usually you will need to use a document editor that has this capability. For PDFs, keywords can be edited with Preview.
We have found the use of keywords to be useful in some situations, and not others. Some documents have many keywords set on them of dubious value.

Chapter 6: Backup and other Details
backing up data and other details like restore, export.

Backing up data
Yep does not backup any of your documents. You need to run Time Machine, or a similar product to back up all your files. My experience over the past 20 years has been that hard drives and or computers suffer massive failures every few years (or sooner!). If you don't backup your documents, they won't be around for long. Sort of like the sign I saw at the dentists once: "You don't have to floss all your teeth, just the ones you want to keep".

Backing up tags and ratings
Yep does make backup files for every item you tag as you tag them. This allows Yep to restore tags and ratings to files that have had them stripped off, which can happen when editing files with Adobe CS4 and a smattering of other applications. These backup files are stored in ~/Library/Application Support/OpenMeta (not the Yep folder, as all OpenMeta applications use the same system).

Backing up tags and ratings manually
The backup files that Yep makes do form an effective backup, - but there are ways in which these files may be incomplete, such as when a tag is added by another application that doesn't make backup files. Also if you are about to reformat a hard drive, or other drastic step, then you may want to backup your tags to a single file. To do this run Yep, then from the File menu pick "Backup metadata". A dialog explaining the process will come up, and later, when the file is made, a dialog similar to the one shown above will be shown.

Restoring from backup
Yep supports restoring from the above two methods of backup, plus it also supports the importing of metadata from old Yep 1 or Leap 1 data files. To do any of these operations, pick "Restore Metadata…" from the File menu, then in order to tell Yep which kind of backup to do, pick one of:
• a '.omsback' file that you made in an earlier manual backup,
• a docInfo.plist.gz file from an old Yep 1 or Leap 1 install or
• the OpenMeta folder in your Application Support folder.

In all three cases Yep will restore tags and ratings to any file it can find in the backup file, being careful not to overwrite newer tags with older ones. Yep stores the path and an alias to the files it makes backups for, and it tries to find the file to restore to using both these methods. Yep will also finish a restore operation with a dialog informing you of the results. If Yep has to set tags on documents that you need to authorize with a password in order to modify, a dialog will be presented for that. This security

authorization for Yep to alter files only lasts a few minutes, so there may be a few of these if there are a lot of files in system areas that you are tracking.

Tech support
At ironic we offer email tech support for all our products. It may be faster to check out the discussion forums first. Our tech support page is located on our web site, at http://www.ironicsoftware.com