

# Mac OS X: Best Practices

A Streamlined Approach to Using Your Mac

## Overview

This quick guide outlines the best practices for using your Mac. It seeks to help Mac users, both those new to the operating systems and those with great experience, to enhance their Mac efficiency. This quick guide will help you discover how to access Mac tools quickly, how to save files efficiently, how to personalize your interface, how to maintain your data and your privacy, and introduce you to a few lesser-known Mac secrets.

## Translating Terms

When migrating from a PC to a Mac, you may find some of the new terminology a bit confusing. The following conversion table may be useful.

PC Term	Mac Term
Start Menu	Finder
Program	Application
Control Menu	System Preferences
Shorts Cuts	Aliases
Control Key	Command/ Open Apple Key (⌘)

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## The Dock

The dock (see figure 1) is where your most commonly used icons are placed. When you install a new application you will be asked if you would like to add it to the dock. If you believe you will use it frequently, you may want to consider placing it on your dock.



Figure 1: The Dock

## Adding and Removing Icons from the Dock

Your Mac comes with icons placed on the dock. If you would like to remove an icon from the dock click and drag it anywhere away from the dock, you will still be able to find it in the applications folder. If you would like to add an icon to the dock:

1. Open a new finder window by clicking the finder icon (see figure 2) in the dock.
2. Select **Applications** from the left-hand menu. Find the application you would like to add to the dock, then click and drag it onto the dock.



Figure 2: Finder Icon

## Menu Bar

Each application has a unique menu bar (see figure 3). The menu bar is where you will find commonly used commands to manipulate the current application. The only item that will remain constant on the menu bar, no matter which application you are using, is the apple icon. The apple icon will always be in the left-hand corner and the options within the apple menu will never change. You may find this is the best way to force quit applications.

## Force Quit

You should only force quit applications if a program is not longer responding. This should be the last resort

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because you may lose unsaved data. There are three ways to force quit an application:

1. The first is to select the apple icon and choose **Force Quit**.
2. Your second option is to go to the dock, then click and hold down the application you wish to quit. You will be given a **Force Quit** option only if the application is nonresponsive.
3. Lastly, you may hold down option + command + escape, then select the application you would like to quit from the menu.



Figure 3: The Menu Bar

## Customizing the Toolbar

At the top of each window is a toolbar. The toolbar gives you quick access to useful tools. You may customize the toolbar in some applications such as Finder and Safari. There are two ways to begin customizing your toolbar.

1. You may either right click in the toolbar area and select customize toolbar;
2. Or go to the menu bar → select **View** → select **Customize Toolbar** (see figure 4). You will be given icons that can be dragged onto the toolbar (see figure 5).

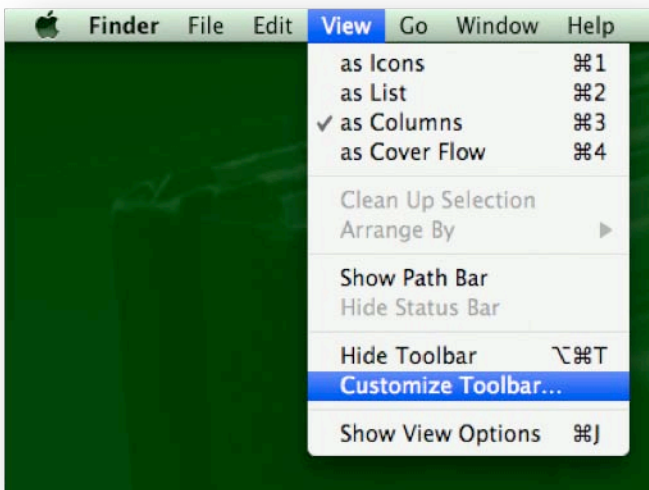


Figure 4: Select Customize Toolbar from the view menu



Figure 5: Options that can be dragged onto the toolbar

## Locating Your Files

When you open a Finder window, you will see your “places” in the left-hand navigation pane. If you do not see all of your places, as seen in figure 7, you can select the home icon and then drag the places you use most onto the left-hand navigation pane under “Places”. These can also be dragged and reordered however you would like. Different types of file types have default locations. For example, photos are placed in “Pictures” automatically. If you would like to save your file in a specific location, you should designate that location when saving the file.

## Creating new folders

For greater specificity you may want to create your own folders. To do so you should first decide where you would like your folder to be located. For example, if you are creating a folder to hold pictures of a specific trip

you may want to place that subfolder inside of the broader “Pictures” folder. Once you have decided where the folder will be located, go to that designation within a Finder window. Then select the tool icon (figure 6) from the top of the finder window. From the tool menu choose **New Folder**, and give the folder a name. You can now drag and drop files into the new folder.



Figure 6: Tool Icon

## Smart folders

Smart Folders save time and effort by automatically populating folders with files that fit criteria preset by you.

Smart Folders you create will be populated without relocating your original files. To create a new Smart Folder open a finder window, go to **File**⇒ **New Smart Folder**. Near the top of the finder window you will be provided with drop down menus to specify the criteria for your Smart Folder. To add or remove criteria you may use the plus (+) and minus (-) signs to the right of the drop down menus (see figure 8).

## Aliases

Aliases are similar to shortcuts on PCs. They are tiny files that automatically open the files they represent. You can put aliases in convenient places, such as on the Desktop, to easily open programs and files that you access often. Aliases do not relocate your original files and they take up less space than copying the file to a new location. To create aliases select the folder, file, or application you would like to make an alias of by clicking on it once in a finder window. Then go to **File** ⇒ **Make Alias**. The alias will be created in the same location and can be identified by the small arrow to the left of the icon. You may now drag and drop your alias wherever it will provide added convenience.

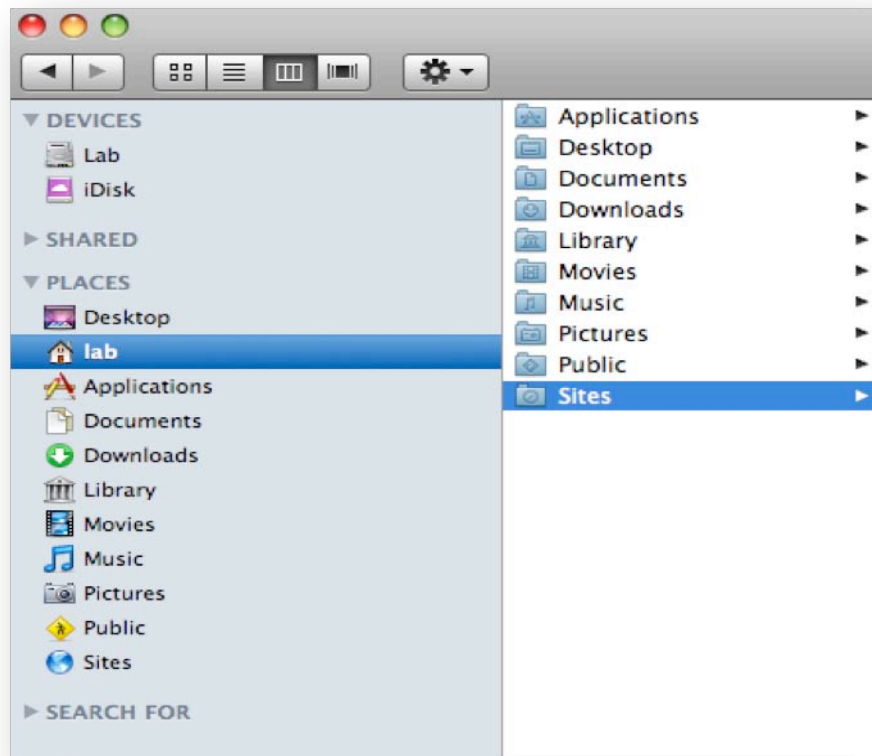


Figure 7: Places

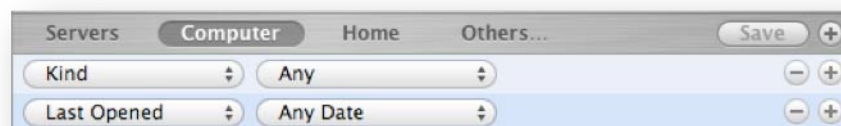


Figure 8: Smart Folders

## Quick look

Quick look saves you time by allowing you to quickly glance at files without having to open them. Quick look works on almost all file types including images, text files, PDFs, and Microsoft office files. To use quick look highlight a file in your finder window by clicking on it once and then hit the space bar. This will open up the quick look preview window.

## Spotlight

Spotlight can be used to quickly search for anything on your computer. It searches file names and words within files. To use spotlight click on the magnifying glass icon in the top right of your screen and enter a keyword into the field. Spotlight will populate search results based on your entry (see figure 9)

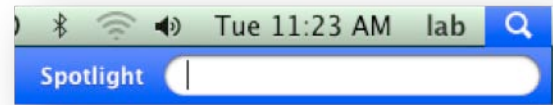


Figure 9: Spotlight

## System Preferences

Most of the tools you'll need to manage your Mac, from the look of your desktop to hardware, can be found in the system preferences menu. To get to the system preferences menu click on the apple in the top left-hand of your screen => **System Preferences** (See figure 10). There may also be a System Preferences icon on your dock.

### Personal

**Appearance:** use appearance options to control the color of onscreen buttons, highlighted text appearance, scroll options, which recent items and how many to feature in the apple menu, and how onscreen fonts appear.

**Desktop and Screen Saver:** The tabs at the top of the desktop and screen saver menu can be used to switch back and forth between desktop preferences and screen saver preferences.

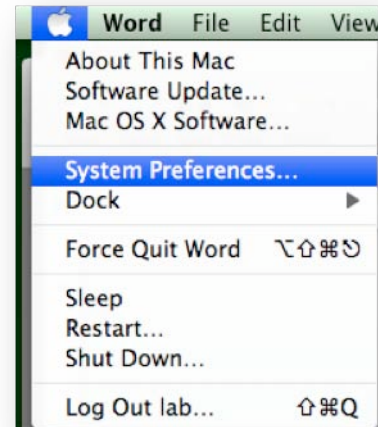


Figure 10: Getting to System Preferences

To set your desktop image you may browse the images that are featured in the left-hand tool bar. If the location of the image you would like to set as your background picture is not there, you may add the location by selecting the plus button at the bottom. Then determine how you would like your image to be displayed by choosing an option from the dropdown menu. You can choose from four options such as "fit to screen". You may also choose to have the images change periodically by checking off "change picture", you may choose to have images displayed in a random order, and have a solid or translucent menu bar.

To begin specifying your screen saver preferences choose a screen saver from the left-hand menu bar. You may also choose to have a random screen saver displayed. Use the blue toggle below the preview to set how long your computer must be idle before your screen saver starts. As you drag the toggle the time will be displayed.

**Exposé:** Exposé will allow you to designate the functionality of your hot corners and allow you to quickly see all the windows you presently have open. To designate which corners do what, select an option from the four dropdown menus near the top of the window (see figure 11). Now when you put your pointer in that corner it will perform the function you specified.

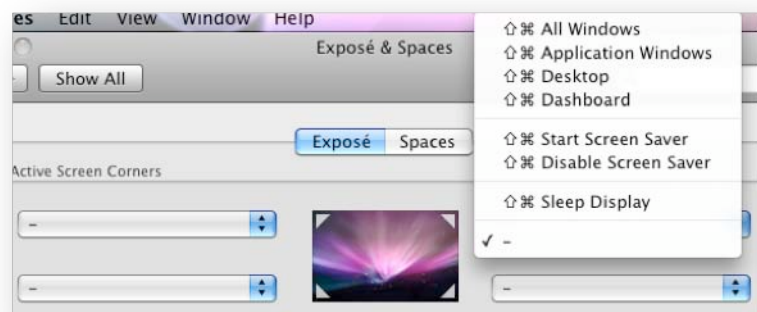


Figure 11: Designating Corners

**Spaces:** Spaces allow you to maximize

screen real estate. You can have as many as 16 spaces. To manage how many spaces you have select the **Spaces** tab in the Exposé and Spaces preferences menu. Then use the plus (+) and minus (-) signs at the top of the window.



Figure 12: Spaces Icon

You may designate applications to appear in a certain space by using the plus (+) and minus (-) signs below the “Application Assignments” window. This will help you to avoid overcrowding of one screen. To move between spaces select the spaces icon (see figure 12) from your dock. If the spaces icon is not on the dock you may go to applications in finder and drag the spaces application onto the dock.

### Dashboard

Your dashboard is home to widgets, or mini-applications, that perform common tasks and provide fast access to information from weather to stock updates. To access the dashboard select the dashboard icon from the dock (see figure 13). If the dashboard icon is not already on the dock you may drag and drop it onto the dock from applications. To add or take widgets off your dock select the plus sign (+) at the bottom of the screen. This will give you pages of widgets you can tab through. To add a widget click on it, to get rid of a widget click the x in the top left-hand corner of the widget. You will find even more widgets that are not already built into your computer by visiting <http://www.apple.com/downloads/dashboard/>.



Figure 13: Dashboard Icon

### Security

*General:* The General tab within Security allows you to tell your Mac when a password should be required. If you so choose, you can check off the coordinating buttons to require a password to wake your computer from sleep mode, set login requirements, and to access each pane in System Preferences. Since the system preferences pane is where most of your computer is controlled, you may want to consider checking off the third box down to require a password to unlock each system preferences pane. However, if you are the only one with access to your computer, this step may only make it more time consuming to change your preferences.

*FileVault:* Can be used to encrypt your files so that unauthorized users may not see them. FileVault should only be used if you have extremely sensitive files on your computer; otherwise there is a danger of losing your data by using FileVault improperly. To use FileVault you must first follow the onscreen directions and set a master password. If you should lose or forget your master password your files will be lost forever. After you have created a master password you may then select **Turn on FileVault**. It may take some time for your files to be encrypted. You will then need your log-on password to access your data.

### Hardware

**Energy savings:** Your energy saver preferences is where you will find options controlling how frequently your computer goes to sleep. Choosing preferences appropriate for your usage will help save energy. Ithaca College Information Technology Services makes the following recommendations:

	Monitor	Hard drive	Sleep
<b>Apple Desktops &amp; Laptops</b>	10 minutes	Put the hard disk(s) to sleep when possible	30 minutes

To change your settings toggle the blue arrows to the appropriate levels and check “Put the hard disk(s) to sleep when possible” (See figure 14).

**Print & Fax:** This system preference allows you to manage your printing options.

If you have more than one printer installed on your computer, you may want to select one as the default. Selecting the printer you use most often means you will not have to select it each time you print. To specify your default printer, right-click on the printer you would like to set as the default in the left-hand pane and select “Set default printer” (see figure 15).

## Network

The Network pane of the System Preferences menu allows you to control how your computer connects to the Internet. Your Mac will automatically detect whether you are connecting to the Internet via Ethernet or a wireless connection. If there is more than one wireless connection in the vicinity, you may specify which one you prefer to use by utilizing the options within this menu. Additionally, if connecting to the Internet requires a password, you may enter it here. If you are having difficulty connecting to the Internet, your Mac will help troubleshoot. Click the **Assist Me...** icon in the bottom right of the screen to run Network Diagnostics.

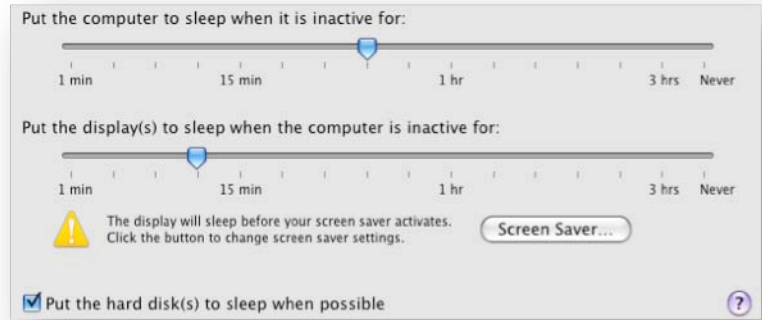


Figure 14: Energy Saver Preferences

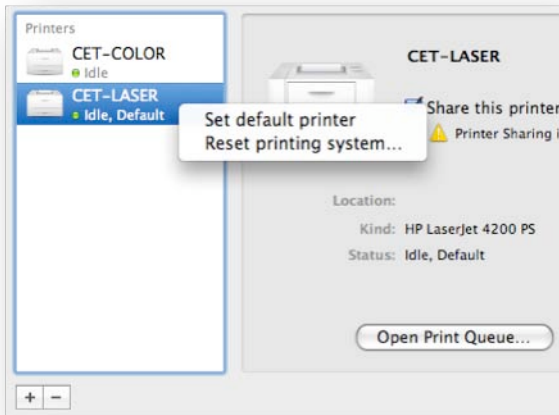


Figure 15: Setting default printer

## System

### Accounts

To add accounts go to the password pane of the accounts menu in system preferences.

1. Select the plus sign (+) in the bottom left of the screen
2. Give the new account a name, a short name, specify a password, verify the password by typing it again, and enter a password hint.
3. Select create account.

If you ever decide you would like to delete an account, just select if from the left-hand side of the accounts menu and click the minus button (-) below the accounts list.

**Software Updates:** On an intermittent basis Apple will make software updates available for Apple software on your Mac. You can schedule your computer to automatically check for updates using the preferences found here. To automatically schedule software updates:

1. Check off “Check for updates:”
2. From the drop down menu select how frequently you would like your Mac to search for updates (see figure 16).

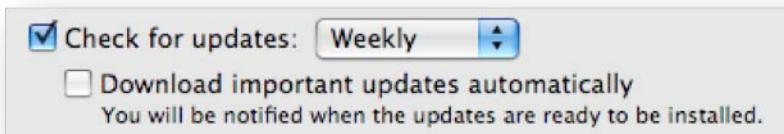


Figure 16: Software Update

If you would also like for important updates to be installed automatically, check the corresponding box. Otherwise, you will have to approve all updates before they are installed.

*Note:* In order for Software Update

to work correctly, your Mac must be connected to the Internet.

## Time Machine

If you have an external hard drive, you can utilize Time Machine (see figure 17) to ensure your files are never permanently lost. Time Machine automatically saves up-to-date copies of everything on your Mac. It remembers how your system looked on a given day so you can revisit your Mac as it appeared in the past.



Figure 17: Time Machine

To use Time Machine:

1. Connect an external hard drive to your computer via FireWire or USB
2. Go to Time Machine in System Preferences
3. Click **ON** under the large Time Machine icon
4. Select the hard drive from the menu
5. Click **Use for Backup**
6. Specify your setting using the onscreen directions

Once you have set up Time Machine, you can find deleted files by entering the Time Machine browser, which can be placed on your dock. Search for items the same way you would if it were on your Mac.

# Troubleshooting Hardware

## Apple Hardware Test

You can use Apple Hardware Test to help determine if there is a problem with your computer's hardware. To use Apple Hardware Test:

1. Disconnect all external devices from your computer except the keyboard and mouse. If you have an Ethernet cable connected, disconnect it.
2. Insert the Mac OS X Install Disc 1 that came with your computer.
3. Restart your computer and hold down the D key as it starts up. A list of available startup volumes appears.
4. Click Apple Hardware Test and click the right arrow.
5. Follow the onscreen instructions when the Apple Hardware Test main screen appears (after about 45 seconds).

If Apple Hardware Test detects a problem, it displays an error code. Make a note of the error code before pursuing support options. If Apple Hardware Test does not detect a hardware failure, the problem may be software-related.

## Disk utility

Disk Utility can be used to help determine if there is a problem with your hardware's permissions. To run disk utility:

1. Go to Applications ⇒ Utilities ⇒ Disk Utility. Make sure you are in the First Aid menu from the selections at the top of the window
2. Select the drive you are having difficulty with from the left-hand menu
3. Click **Verify Disk Permissions**
4. If anything is found to be wrong, choose to repair the disk

# Applications

## Minimizing, Maximizing, and Closing Applications

The red, yellow and green buttons (see figure 18) in the top left-hand corner of each window are used to close, minimize and maximize windows respectively. When you



Figure 18: Close, Minimize, Maximize

minimize a window it will go to the dock next to the trash bin. If you maximize a window it will go to a size your Mac determines is best. If you would like to manually resize the screen, drag the right-hand corner to the desired size.

When you use the red button to close the screen, Mac responds differently than a PC would. The window closes but the application does not quit.

## Quitting an application

Leaving applications running when they are not being used unnecessarily takes up your Mac's memory. Therefore, you should quit applications that are not being used. You will know that the application is still running if there is a white dot below its icon on the dock. There are two ways to quit applications.

1. You can select the application from the menu bar and choose to quit the program (see figure 19),
2. Or you can use your keyboard to quit the program by holding **command + Q**.

## Quickly Switching Between Applications

To quickly switch between applications hold the **command + tab**. Each time you click tab, the highlighted application, indicated by the white box surrounding it, will move to the right. Once the application you would like to go to is selected, release the tab and command keys.

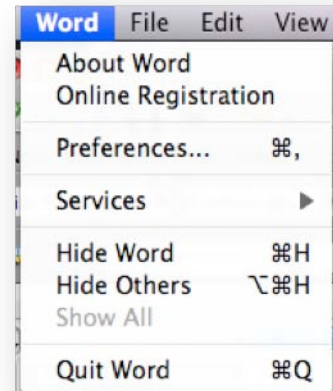


Figure 19: Quitting from the Menu Bar

## Compact Discs

### Burning

To burn files onto a disk you must first create a burn folder. To create a new burn folder:

1. Select where you would like the burn folder. You can always move it or get rid of it later.
2. Create the burn folder by selecting **New Burn Folder** from the tool drop down menu (see figure 6).
3. Drop whichever items you would like to burn to the disk into the new burn folder.
4. When your burn folder is complete, click **Burn** in the top right corner of the finder window.

For tips on how to burn multiple times onto the same CD, visit: <http://www.apple.com/pro/tips/burnmulti.html>.

### Ejecting

There are multiple ways to eject a disk. You may depress the eject key on the upper right-hand side of the keyboard; you may go to the desktop and drag the disk to the trashcan; or you may select the eject button next to the CD in the finder menu (see figure 20).

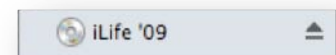


Figure 20: Ejecting from Finder

## Sleep, Restart, Shut Down

### Sleep

Apple recommends that you put your Mac to sleep if you will be away from your computer for a short time. This allows you to quickly wake the computer from sleep mode and bypass the startup process. To put the computer to sleep, do one of the following:

- Choose the Apple from the menu bar (⏏) ⇒ **Sleep**.
- Press the power button on your Mac.
- Choose Apple (⏏) ⇒ **System Preferences** ⇒ **Energy Saver**. Then set a sleep timer for the computer.

To wake your computer from sleep, do one of the following:

- Press any key on the keyboard.
- Click the mouse.
- Press the power button on your Mac.

## Restart

If you connect a new device to your Mac or install an update you may have to restart your Mac. This will usually happen automatically. However, to restart your Mac manually Choose the Apple from the menu bar(☐) ⇒ **Restart...** ⇒ **Restart** from the window that appears.

## Shut Down

Apple recommends that if you will not be using your Mac for a day or more, you should turn it off. If you have a Mac laptop you should turn it off when you transport it to protect its hard drive. To turn off your Mac , choose Apple (☐) ⇒ **Shut Down....** ⇒ **Shut Down** from the window that appears.

## Other Quick Tips

- **Keyboard Shortcuts:** Using keyboard shortcuts (or key combinations), allows you to quickly perform a wide range of tasks. In addition to the large number of predefined keyboard shortcuts included with Mac OS X, the Mac lets you customize shortcuts. To modify shortcuts, use the Keyboard Shortcuts tab in the Keyboard & Mouse pane of System Preferences
- **Maintenance:** Your Mac runs scheduled maintenance at three AM and on Saturday mornings. Therefore, if you use your Mac on a daily basis, you should consider leaving it on overnight.
- **Software:** You may find it advantageous to delete software you do not use. This will free up space on your hard drive and allow your Mac to operate more quickly.

## Apple Support

If you need additional support that cannot be provided through Ithaca College, you may reach Apple Support at 1-800-275-2273 or via [www.apple.com/support](http://www.apple.com/support).

## Getting Your Serial Number

To seek support you will need your Mac serial number. To access your serial number:

1. Go to the Apple Menu in the top left-hand corner
2. Select **About This Mac**
3. Select **More Info...**

The last line in the hardware menu is your system's serial number. Take note of it so you may references it when you contact Apple.

## For the Latest Information

For the latest information about Mac OS X, go to the Mac OS X website at [www.apple.com/macosx](http://www.apple.com/macosx).

## For More Information

A variety of support services are available from ITS if you would like additional help:

Computer training on a variety of topics is available to faculty, staff, and students at no charge through the Technology Learning Center (TLC). Check out the current TLC training schedule online at <https://www.ithaca.edu/its/workshops>

Online documentation and tutorials on IC-supported computing software and systems are available at <https://www.ithaca.edu/its/traindoc>

Frontline computing support is available through the ITS Helpdesk in 104 Job Hall; send e-mail to [helpdesk@ithaca.edu](mailto:helpdesk@ithaca.edu) or call 607-274-1000.

Backline consulting support is available in the Technology Learning Center, room 101 Friends Hall.

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