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Mac OS X 10.4 Tiger

Robin Williams

A New Way of Working on your **Mac**



12

Goals

Learn how to use Spotlight effectively and efficiently.

Get used to looking for and using Spotlight searching in other applications.

Learn to create and use Smart Folders.

Experienced users, transition to Spotlight searching instead of clicking windows open and closed.



Lesson 12

Find What You Want, Fast— with Spotlight

Spotlight is not just a new search feature in Tiger, it's a new way of working with your Mac. Once you get accustomed to its speed, versatility, and usefulness, you'll find yourself using Spotlight regularly instead of opening and closing folders and windows.

If you find you perform a certain search regularly, save it as a Smart Folder. Files that match the search criteria are automatically listed in this folder and the folder updates itself every time a matching file is created or changed.

You'll never be the same.

The Many Faces of Spotlight

Spotlight really has **four** different ways of working. You'll find yourself using one or the other at different times. Experiment with each one so you'll know which is the most appropriate for what you need to do. Details for each option are on the following pages.

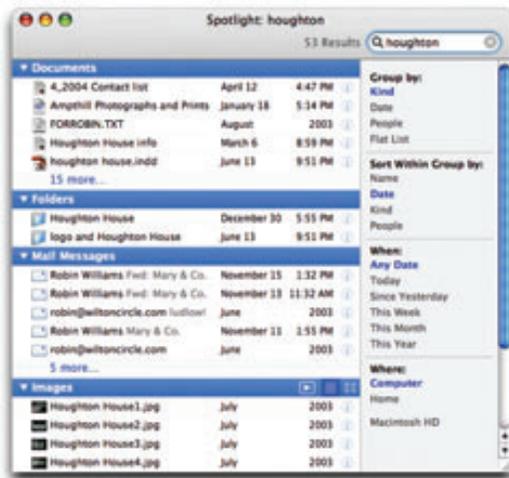


1. Spotlight menu

Click the Spotlight icon in the upper-right of the menu bar, **or** use the keyboard shortcut, Command Spacebar.

Type your query into the field that appears and Spotlight instantly starts presenting results. As you type more letters, the search narrows and updates.

Access to the Spotlight menu is available no matter which application you're using—you don't have to go to the Finder to run a search. See pages 310–311 for all the details.



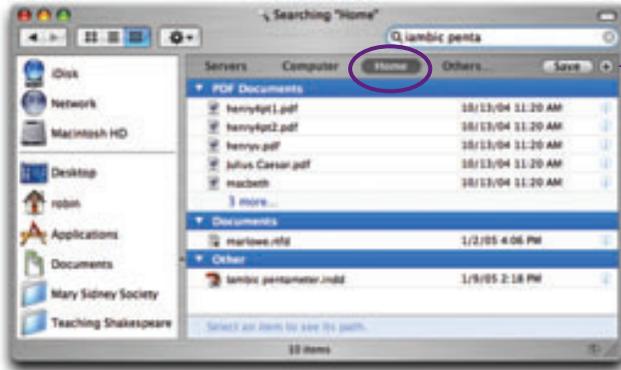
2. Spotlight window

To get this Spotlight window that displays more information: **Either** click the option to “Show All” at the top of the Spotlight menu, as shown above. **Or** use the keyboard shortcut, Command Option Spacebar, to display this window directly. See pages 312–313 for details.

The keyboard shortcut works in most applications so you don't have to go to the Finder first.

3. Spotlight-powered search in the Finder, plus Smart Folders

When you type into the Search field in a Finder window, Spotlight instantly kicks in and show you simple results directly in the window. It automatically looks in the last “location” that was chosen (“Home” in the example below).



If you don't see this “Save” button and the + sign, open your window wider.

Click the + sign to get the options to narrow your search.

You can save a search as a **Smart Folder** (see pages 316–317) that will automatically update itself.

Choose “Find...” from the File menu (or Press Command F) to get a window similar to the one above, but with two refinements (“Kind” and “Last Opened”) already set up. See pages 314–317 for details, including **Smart Folders**.



4. Spotlight-powered search in many applications

Mail and Smart Mailboxes, pages 318–321.

Address Book and Smart Groups, pages 322–325.

System Preferences, page 326.

Automator, page 327.

Spotlight in text-based applications, page 328.

Open and Save As dialog boxes, pages 329–330.

But Before You Begin

There are several things you might want to know before you change your life using Spotlight. In the Spotlight preferences, you can choose which **categories** of items you want Spotlight to search through. You can also choose certain disks and folders that you (or anyone using your machine) *cannot* search through, giving you some extra **privacy**.

And on the following pages are some tips for searching.

Choose the categories for searching

- 1 From the Apple menu, choose “System Preferences....”
- 2 Single-click on the “Spotlight” icon.



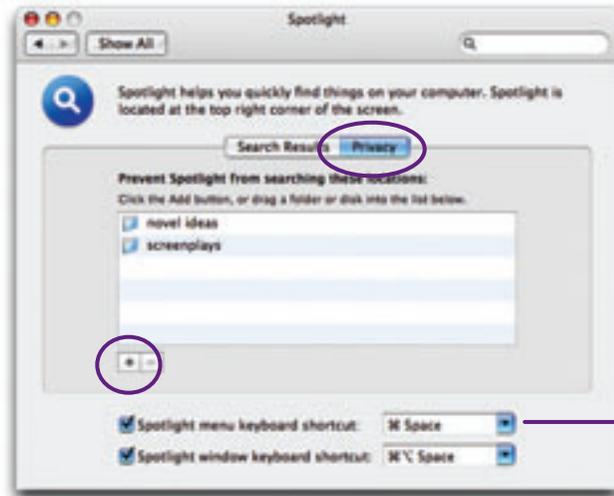
- 3 Click the “Search Results” tab if it isn’t already highlighted.



- 4 Uncheck boxes for categories you *don't want* Spotlight to search.

Create some privacy

- 1 If you haven't already, open the Spotlight preferences, as explained on the opposite page.
- 2 Click the "Privacy" tab.



You can change these keyboard shortcuts if you find they interfere with your favorite applications.

- 3 Click the + sign to open a dialog box where you can choose any folder or disk on your Mac that you don't want Spotlight to search.
Or drag any folder or disk icon from the Finder and drop it into this pane.

Note: This isn't a very *safe* privacy feature because anyone using your computer can just open the preferences and remove these items.

Keyboard shortcuts to open Spotlight

Notice in the illustration above that these preferences also include options for you to change the existing keyboard shortcuts or to turn them off altogether (uncheck the boxes).

Don't search just file names

Spotlight doesn't just search file names. It searches the contents of email messages, it knows who sent you email, it can look through the contact information in your Address Book, images and graphics, calendars and events and to-do lists, System Preferences, PDF text, the contents of TextEdit pages (but not text clippings), even iChat logs (if you previously chose to log them).

Expand the search with metadata

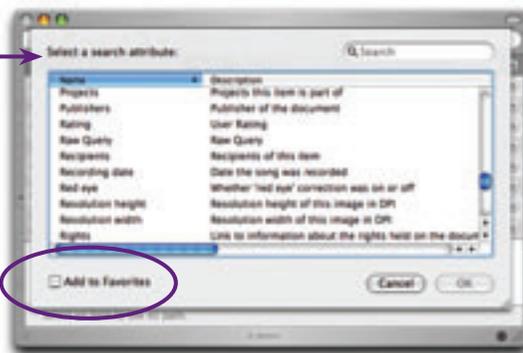
Spotlight also looks in the **metadata** that every file contains. Metadata includes information about who created the file, when it was created and modified, the copyright date, the file type, the color space for a photo or image, even what kind of camera a particular photo was taken with. Different kinds of files have different kinds of metadata associated with them.

To make a metadata attribute appear in the parameter menu, select it in the list and then check the box to “Add to Favorites.”

In the Finder search (see page 314), single-click any of these parameter menus in the left-hand column and choose “Other...” to get a list of metadata options to search for.

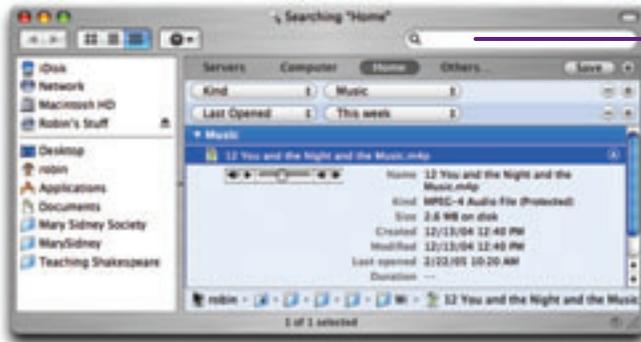


Click a plus sign to add another parameter; click a minus sign to delete that one.



Expand your repertoire of search terms

You're not limited to searching just for *words* that might be found in a file. In the Finder Spotlight search, you can use the existing parameters to find particular categories of files. For instance, you can look for “music” to find all your music files, or “images today” to find all the images you have opened today.



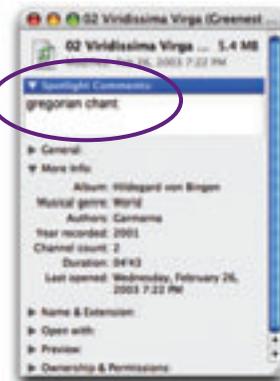
Leave the search field empty when you use these parameters if you want to find all files of a particular type.

Use keywords when necessary

There are some files that, even with all the options in Spotlight, still won't be found because there is nothing associated with them that Spotlight can decipher. For these files, you can add your own **keywords**. For instance, the example below is a music file of a Gregorian chant written by Hildegard von Bingen in the early 12th century. I can search for “music,” “bingen,” and other data, but if I search for “gregorian,” this piece of music won't be found. So I added “gregorian” and “chant” to the Get Info window for this file and for all the other Gregorian chants I have on my Mac. Now Spotlight can find them.

To add a keyword, select the file. Then press Command I to get the Get Info window. Type your keywords into the “Spotlight Comments” area.

If you have more than one file to which you want to add keywords, select one file, then press Command Option I. Now as you select other files, this Get Info window automatically displays the information for the currently selected file.



Spotlight Menu

The Spotlight menu is available no matter which application you are using at the moment (although this is *not* the tool to use to search within your application, such as searching the text on a visible web page or in your word processor).

To open the Spotlight menu:

- 1 Simply click on the Spotlight icon in the upper-right of the menu bar.
- 2 A small field appears. Start typing in it.

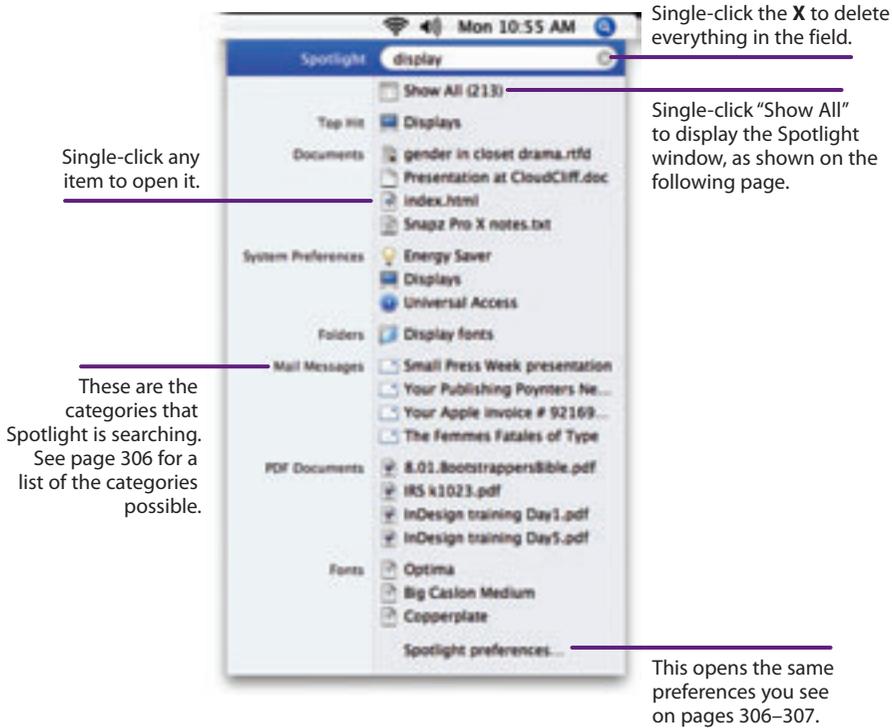


Results appear instantly in the Spotlight menu, as shown below. The more letters you type, the narrower the search becomes.



To use the Spotlight menu:

Below are callouts of the various parts of the Spotlight menu. Use the Spotlight menu for a quick search for something you think can be easily found.



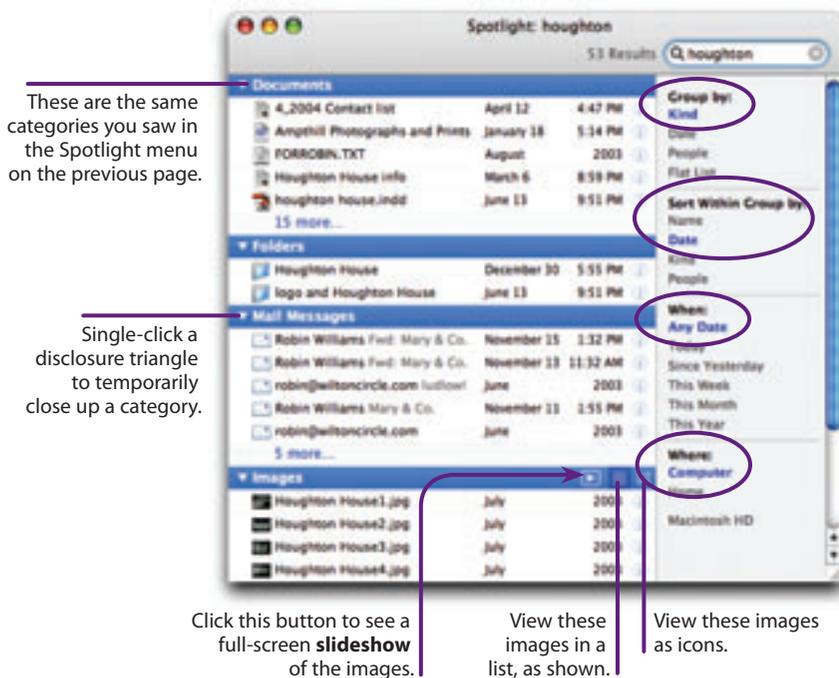
Keyboard shortcuts

Show All	When “Show All” is highlighted, hit Return to open the Spotlight window.
Top Hit	<i>Hold down</i> the Command key and tap the Return key to open the Top Hit file.

Spotlight Window

Use the Spotlight window when you would like to be able to sort (organize) the results, see details about individual items, or preview images and movies.

To open the Spotlight window, press Command Option Spacebar, **or** choose “Show All” from the Spotlight menu, as explained on the previous page.

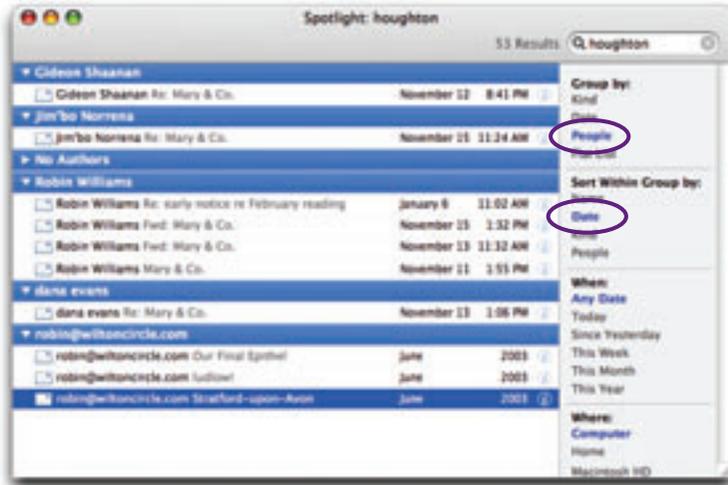


Enter text in the search field (unless you chose “Show All” from the Spotlight menu search, in which case the search field is already filled in).

To organize the results, first choose an option in the right-hand pane under “Group by,” then “Sort Within Group by.” You can see above by the blue color that these items are grouped by “Kind” and sorted (alphabetized) by “Name.”

To filter the results, choose a time frame, if you like. Above, you can see the results are from “Any Date.”

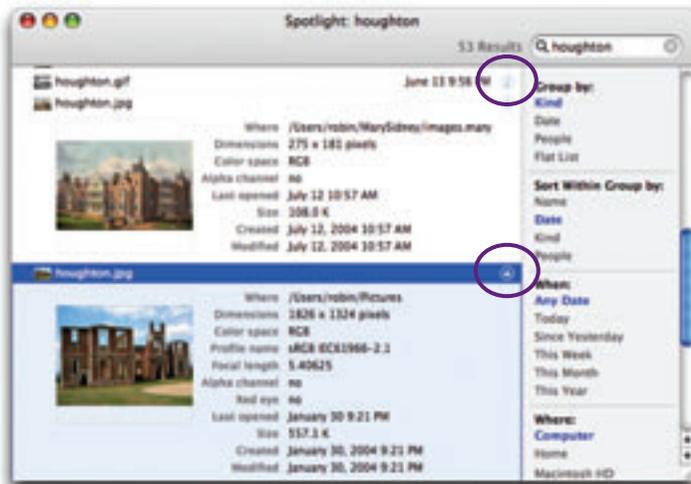
To limit the results, choose a location, “Where,” for Spotlight to search. Above, you can see that Spotlight has been limited to just the “Home” folder.



This is an example of grouping the results by “People.” Spotlight displays each person who has authored a file that contains the words you searched for. Within each “People” category, the results above are organized by “Date.”

To view a preview of an image or details of a file, single-click the “i” button, circled below. If the file is a movie, you can click its play button to view the actual footage; if it’s music, you can listen to it.

To close these details, single-click the triangle, circled below.



Spotlight in the Finder

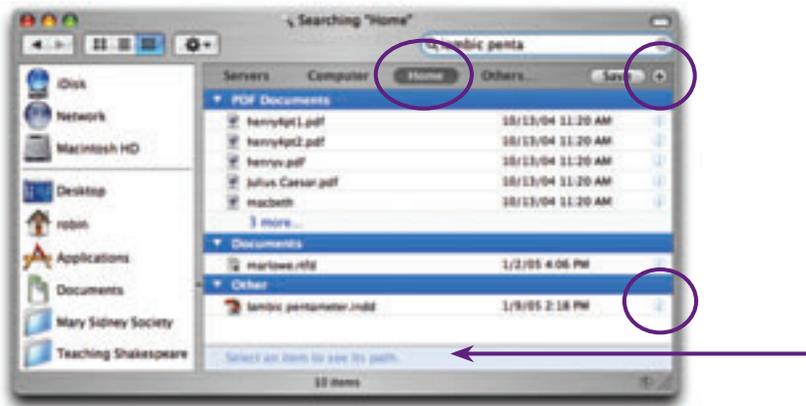
There are two ways to use Spotlight in the Finder, both of which use your Finder window. You can do a **quick search** by simply typing in the search field. Or press Command F to get a more **specific search** window with options to narrow your search. Use the Finder Spotlight when you want to limit your search to certain disks, folders, or parameters.

Quick search in a Finder window

Below are the **results** of a quick search for “iambic penta.” As soon as you start typing in the search field, results appear. Also, a bar appears that tells you exactly where Spotlight looked (in the example below, it searched the “Home” folder).

In this window, you can easily choose another location for Spotlight to search—just single-click one of the locations in the bar, shown below.

You can also click the **+** button that now appears (circled, below) to add more parameters for narrowing your search, as shown on the opposite page.



To see where a file is located, single-click any result; the path to that file (the folders within folders) will appear at the bottom of the list.

To open the folder that holds the selected file, press Command R (or Control-click, right-click, or use the Action menu to choose, “Open Enclosing Folder”).

To see more information about a file, click the “i” on the right side.

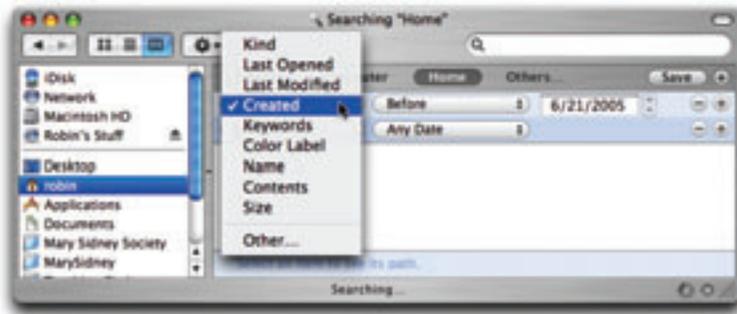
To open that file, double-click it.

Specific search in a Finder window

On the Desktop, press Command F and the active window will switch to what you see below. If no window is active, this new one will open. This window includes the search field, and the location bar is already visible.



This Find window also provides two parameters ready for you to work with. To add more, click the plus sign; to delete any, click its minus sign.



To change the options, single-click on a parameter menu to choose a different option. Start with the menu on the left, as shown above, which will change the specifics in the next menu to the right, which might then create a new field for you to enter a new parameter, also shown above.

The “Save” button is to create Smart Folders, which are explained on the following pages.

Finder and Smart Folders

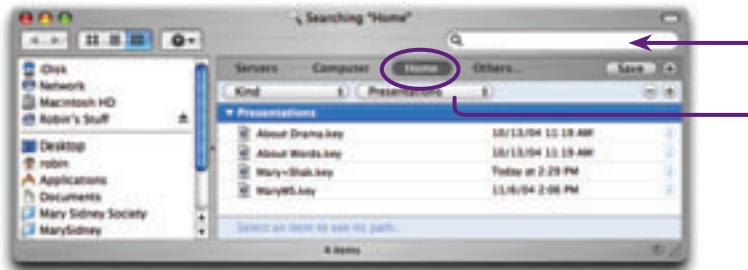
Once you do a great search in the Finder via Spotlight, you might like to create a **Smart Folder** that automatically keeps track of every file that fits that search. This folder doesn't store the original files—the originals stay in their original folders, and the Smart Folder just keeps a list of everything.

For instance, you might want a Smart Folder that contains all the various presentations you've made so you don't have to go looking through numerous folders to find a particular one. If so, make a Smart Folder that just stores presentation files.

Or you might have used the Labels feature on your Mac (see page 140) to color-code all the files that belong to a certain project. For instance, your newsletter might include a **document** in the application Pages, **images** from the last event, **word processing files** your authors have sent you, and a **spreadsheet chart** from AppleWorks. And you used the Labels to give them all a label color of green. Your Smart Folder can keep track of all the green-labeled files in one place for you, even though the files themselves are organized into their own particular folders. The Smart Folder updates automatically as new files are labeled or old files are trashed.

To create a Smart Folder:

- 1 At the Finder, press Command F to open Spotlight in a Finder window.
- 2 Define your parameters. Below is a simple search of all files in my Home folder that are presentations. Notice there is *nothing* typed into the search field at the top of the window because I want to find *all* presentations regardless of their names.

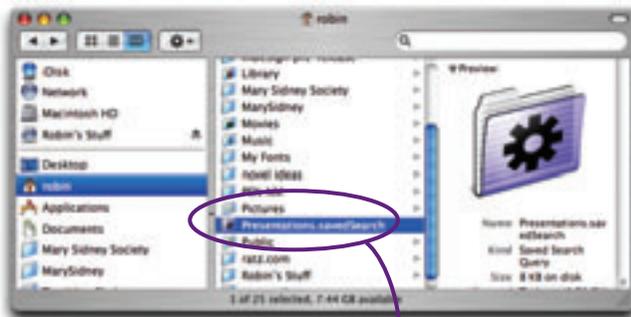


- 3 Click the “Save” button, which is just below the search field. You will be asked to name this Smart Folder and where to save it. In the example below, I saved this into my Home folder, “robin.”

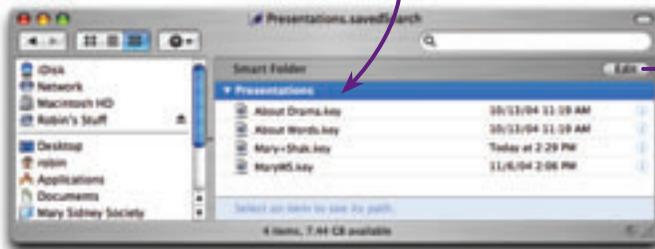
If you want this folder to be visible in your Sidebar, check the box to “Add To Sidebar.” Click “Save.”



- 4 Now that the Smart Folder is saved, all you need to do is double-click on it and your Mac will display all the files that match the criteria you originally set. (If the Smart Folder is in the Sidebar, just single-click on it.)



I saved this Smart Folder into my Home folder, “robin.”



Edit this Smart Folder search at any time. Files will automatically update.

Spotlight in Other Applications

You can find Spotlight-enabled searches in many other applications. Some of them also let you create other forms of Smart Folders (as explained on the previous pages).

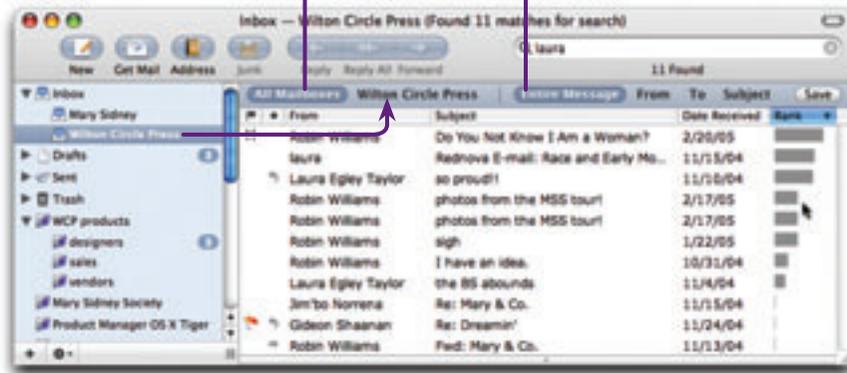
Mail search

In Mail, Spotlight searches very thoroughly. It's very simple.

- 1 Choose an account in the Mailboxes drawer (shown below, left).
- 2 Enter a word or phrase in the search field; results immediately appear.
- 3 A new bar also appears, as shown below. In this bar you can choose which account to search, and which part of the email to search.

Choose "All Mailboxes" or just the one account that is showing.

"Entire Message" includes not only the message, but the From, To, and Subject lines as well.



Smart Mailboxes in Mail

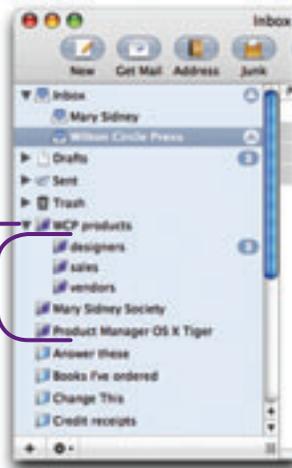
You can also create **Smart Mailboxes** that will hold all the email messages that meet certain search criteria. If you are familiar with the Rules (filters) you can create in Mail, as explained on page 87, you'll notice there are a couple of differences between Rules and Smart Mailboxes.

- A Rule is an *action* that is applied to a message, such as filtering certain email into a certain folder. The *original* email is sorted into the folder.
- A Smart Mailbox contains messages that match search criteria. No action is taken on the messages.
- A Smart Mailbox does not contain the *original* message, thus the same message can be “stored” in a number of Smart Mailboxes.
- A Smart Mailbox automatically updates itself as messages come in or are deleted.
- A Smart Mailbox applies the search rules to mail that is already in your box, not just on future incoming mail.

Below you see an example of several Smart Mailboxes in the drawer. The one named “WCP Products” is actually a Smart **Folder** that contains three other Smart **Mailboxes**. The folder is just for organizational purposes. Both are explained on the following page.

A **Smart Folder** has a disclosure triangle to its left, indicating it holds other mailboxes.

These other five folders shown here are **Smart Mailboxes**.

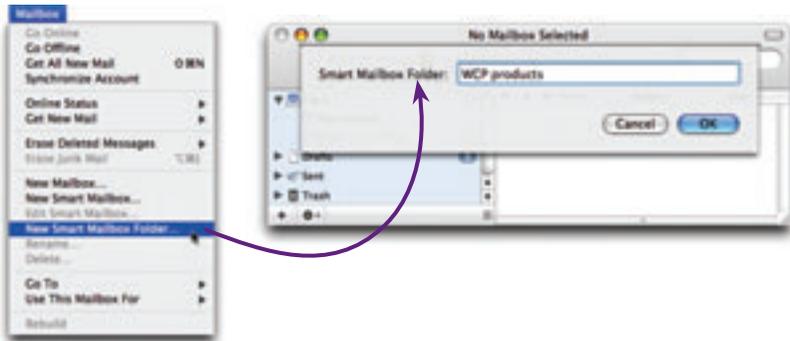


There are several ways to **create a Smart Mailbox**. One is from the Mailbox menu (below) and another is the Save button, as shown on the opposite page.

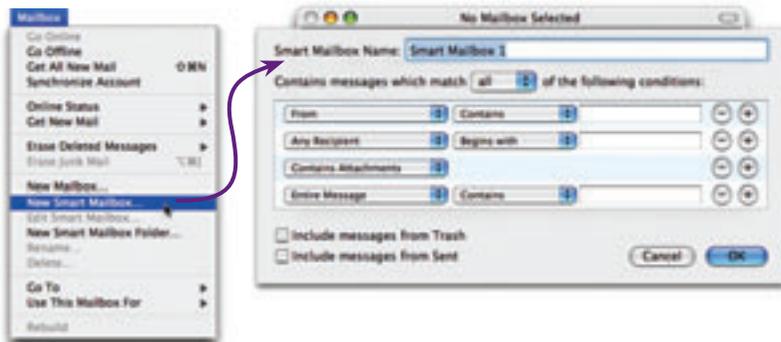
To create a Smart Mailbox from the Mailbox menu:

- 1 If you go to the Mailbox menu, you'll see there are two similar options, “New Smart Mailbox Folder...” and “New Smart Mailbox...”

The **Smart Mailbox Folder** creates a folder with no search parameters; it is simply for organizing other **Smart Mailboxes** inside (as shown on the previous page). If you choose this, simply name the folder and click **OK**.



If you want your Smart Mailbox to be *inside* of an existing Smart Folder, first select that folder in the Mailboxes drawer; if not, make sure that folder is *not* selected. When you choose “New Smart Mailbox...”, the search box shown below appears. Choose your parameters and click **OK**.



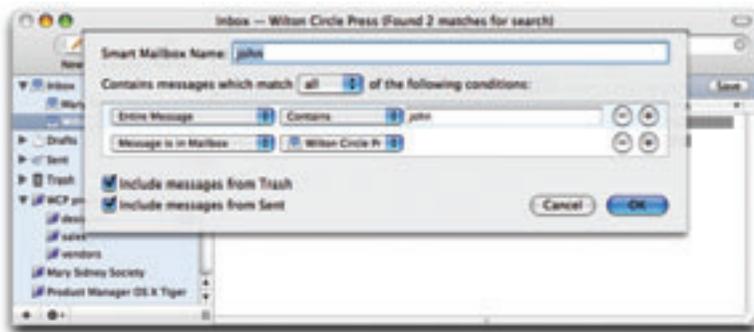
- 2 If you need to edit the parameters of your new Smart Mailbox, select it, then either Control-click, right-click, or go to the Mailbox menu and choose “Edit Smart Mailbox...”

To create a Smart Mailbox from the Save button:

- 1 Do a search as usual, as explained on the previous pages.



- 2 If the search gives you what you need and you think you'll want to use the same search again, click the “Save” button.
- 3 The saved search is automatically named with the search phrase you just used. You can refine your search here, if you like. When ready, click ok.



- 4 If you need to edit the parameters of your new Smart Mailbox, select it, then either Control-click, right-click, or go to the Mailbox menu and choose “Edit Smart Mailbox...”

Address Book

You can do a standard, simple search for anyone or any information in your collection of contacts. And you can also do a Spotlight search of anyone in your Address Book that searches your entire hard disk for everything related to that person.

To search your Address Book for a contact:

- 1 To search for a contact within a Group**, single-click the Group name you want to search.

To search your entire database of contacts, click the “All” group, as shown below.
- 2** Single-click in the search field.
- 3** Type the first couple of letters of the name of the person you want to find, either first or last name or the business name. As you type, results will appear in the center “Name” pane.
- 4** Type more letters to narrow your search, or single-click one of the contacts in the “Name” pane.



Click this X to delete everything in the search field.

If there is even one character in this field, you won't see all of your contacts.

- 5 To display all of your contacts again**, click the X in the search field, and single-click on the “All” group.

To search for a person or business in Spotlight:

- 1 Find the person you want to Spotlight, as explained on the previous page.
- 2 From the Action menu (the gearwheel, circled below), choose “Spotlight: ‘This Person’ ” (where ‘This Person’ is the name of the contact you just searched for; that name automatically appears in the menu). See the illustration below.



- 3 You will get the Spotlight window, as explained on page 312. It will show you every file on your computer that is connected with this person, such as email she’s sent, files she’s mentioned within, documents she has created and sent to you, images of her, and more.

Smart Groups in Address Book

A Smart Group is a list of contacts that automatically updates itself as contacts meet its criteria. For instance, you might want a Smart Group that automatically adds people who work for a certain company or who are part of your salon. You can create a Smart Group that tells you when someone’s birthday or anniversary is approaching. Or you might want to gather a list of everyone in a particular city without having to find them all in your Address Book—a Smart Group will find existing contacts and automatically collect them.

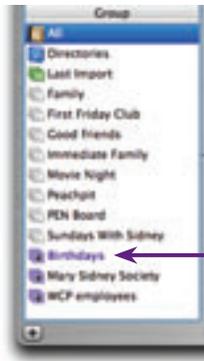
Some of these searches require, of course, that you have a particular field on your card and that it has data in it. For instance, you can’t have a Smart Group that tells you when a birthday is coming up if you don’t have the Birthday field on your cards. For directions on how to **add new fields** to individual cards or to all cards, please see page 91.

To create a Smart Group:

- 1 Either from the File menu across the top of the screen or from the Action menu in the Address Book, choose “New Smart Group...”
- 2 In the sheet that drops down, as shown below, choose your parameters.



- 3 Click the **+** sign several more times to add several more parameters, if you need them.
- 4 If you want to see a visual clue that a new item has been added to the Smart Group, be sure to check the box to “Highlight group when updated.” Then when a new item is automatically added, the Smart Group will change color, as shown below.



Here you see three Smart Groups. This one is in a different color because it added a new contact to itself.

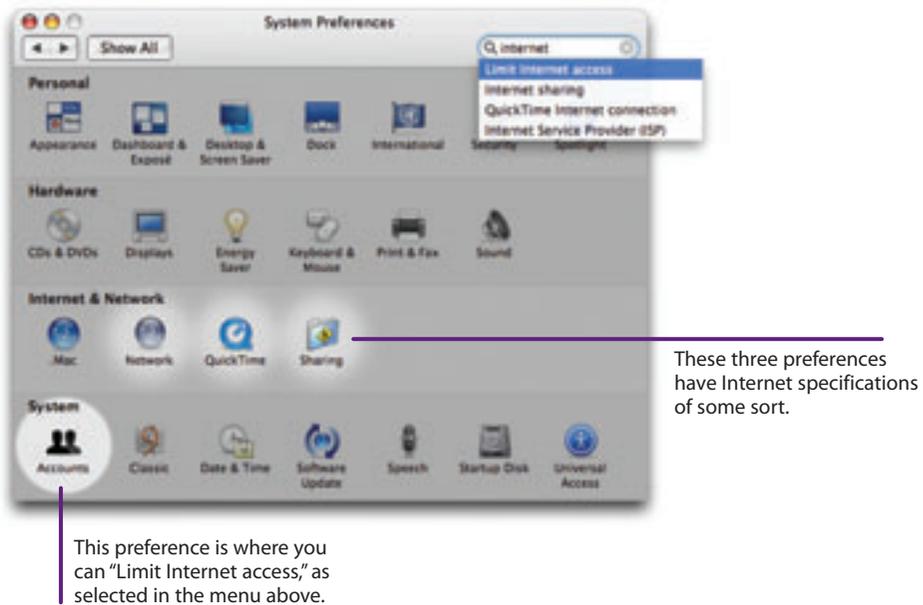
- 5 As mentioned on the opposite page, some of the parameters require that you add that field to the template, as explained on page 91.

System Preferences

As explained in Lesson 6, Spotlight also works in System Preferences. This is great when you want to open a System Preference to do something in particular, but you're not sure which one is the one you need.

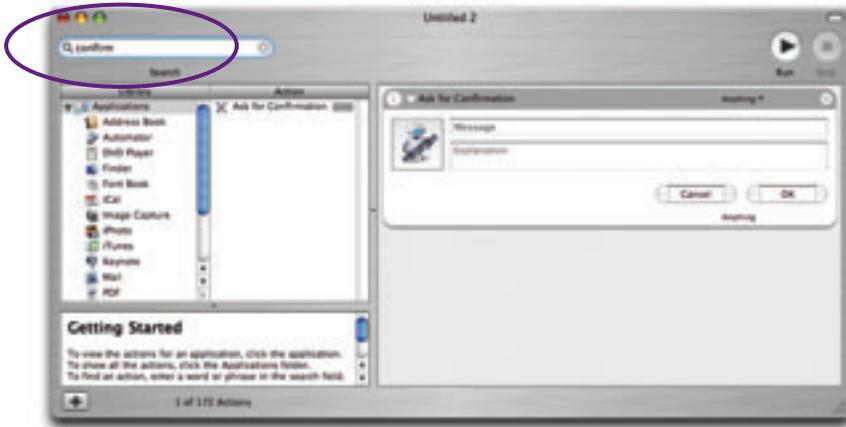
To search in System Preferences, simply type into the search field. As you type, Spotlight highlights all the possible preferences that might help you.

When you click on one of the options in the menu that appears, Spotlight highlights the best preference for that option in a bright white spotlight, as shown below, then opens it for you automatically.



Automator

Automator, as I explain in detail in Lesson 16, lets you automate repetitive tasks with the click of a few buttons. Spotlight is great in Automator because sometimes you know what you want to do, but you don't know which action will do it. Just use the search field, as shown below.



Spotlight in text-based applications

In some applications on your Mac, you can select a word or phrase and let Spotlight find other occurrences of that word or phrase on your Mac. This might be useful when you're browsing the web and find the name of someone in the news and it makes you say, "Hmm, didn't she send me an email last month?" Or if you're in your word processor and you're writing an essay and you want to find the article you saved earlier on a topic that's mentioned.

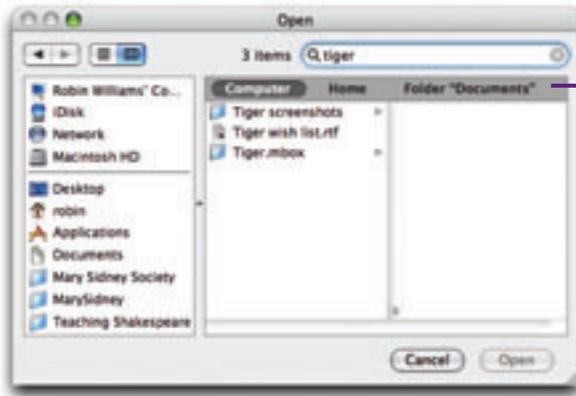
For instance, try this in Safari or TextEdit:

- 1 On a web page, press-and-drag to select a word or phrase.
- 2 Control-click (or right-click) on that selected word or phrase.
- 3 From the contextual menu that appears, choose "Search in Spotlight." Remember, Spotlight searches your Mac, not the Internet!



Open dialog box

In any Open dialog box, as shown below, you can search for a **file name**. Spotlight will locate all files that your open application thinks it can open and display, plus all folders with that search phrase in the name (it does *not* search contents or to-do list items, etc., in this dialog). Any Smart Folders you have placed in the Sidebar will also appear here.



After you start typing a search entry, this bar appears.

Narrow or expand your search by clicking on one of these locations.

Save As dialog box

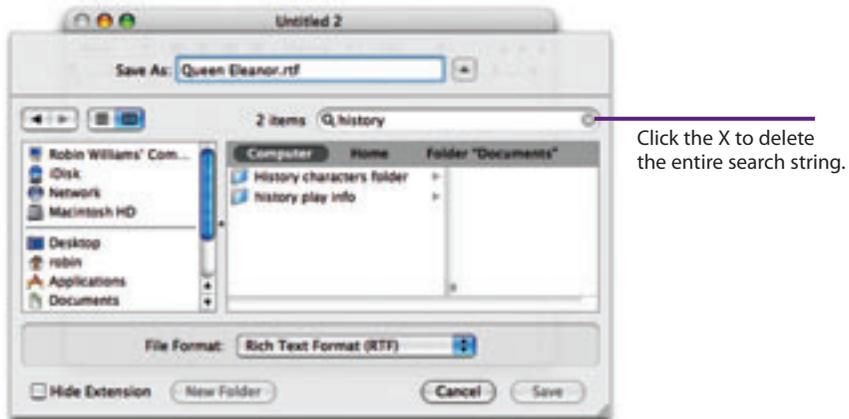
You can do a search in the Save As dialog box and Spotlight will find **folders** for you to save into. Any Smart Folders in the Sidebar will also appear here.



Click the X to delete the entire search string.

Save As dialog box

You can do a search in the Save As dialog box and Spotlight will find **folders** for you to save into. Any Smart Folders in the Sidebar will also appear here.



What You've Learned

- ▼ The different ways to access Spotlight.
- ▼ How to choose or change the categories for searching.
- ▼ How to prevent selected folders from being searched.
- ▼ How to expand the search with metadata and add a metadata parameter to your list.
- How to add searchable keywords to files.
- How to use Spotlight in the menu bar.
- How to use the Spotlight window.
- How to use Spotlight in a Finder window.
- How to create Smart Folders.
- How to take advantage of Spotlight in other applications.
- How to create Smart Mailboxes in Mail.
- How to create Smart Groups in Address Book.
- How to use Spotlight in Open and Save As dialog boxes.

Keyboard Shortcuts

Command F	Search in Finder window with search parameters and metadata
Command Spacebar	Search via the menu bar
Option Command Spacebar	Search window with sort categories
