



TAKE CONTROL OF SONOMA

by **JOE KISSELL**
\$14.99

Table of Contents

Read Me First	6
Updates and More	6
What's New in Version 1.2	7
What Was New in Version 1.1	8
Introduction	9
Sonoma Quick Start	10
Take In the Scenic View	12
Find Out What's New in Sonoma	12
Catch Up with macOS Changes	14
Check Your Mac for Compatibility	20
Model Support	20
RAM	22
Free Disk Space	23
Solid-State Storage	23
Upgrade to Sonoma	25
Update Your Third-Party Software	26
Back Up Your Disk	28
Decide on an Installation Method	31
Learn About Upgrades via Software Update	36
Make Final Preparations	38
Upgrade Using Plan A: In-Place Upgrade	42
Upgrade Using Plan B: Clean Install	48
Perform Post-Installation Tasks	59
Troubleshoot Upgrade Problems	65
How to Downgrade macOS	68
Adapt to Sonoma Changes	71
Get Your Visual Bearings	71
Update Your Backup Strategy	81
Explore System Settings	84

Enhance Video Conferencing	94
Use Presenter Features	94
Enhance Video Calls	100
Work with Widgets	107
Understand Desktop Changes	107
Use Widgets on Your Desktop	108
Put Widgets in Notification Center	113
Do More with Messages	114
Search Messages More Effectively	114
Catch Up with Long Conversations	116
Swipe to Reply	116
Improve Your Audio Messages	117
Share and Request Locations	117
See All Your Stickers Together	119
Verify Contact Identities	121
Meet Safari 17	122
Use Multiple Profiles	122
Turn a Webpage into an App	126
Browse More Privately	128
Control Extensions Per Site	129
Take Notes Further	131
Use New Styles	131
Work with PDFs in Notes	131
Link Related Notes	133
Move a Note to Pages	134
Mind Your Reminders	135
Reminder Sections	135
Column View	136
Automatic Grocery List Sorting	136
Suggested Reminders	139
Mark Reminders as Complete in Widgets	139
Early Notifications	139

Manage Your Privacy and Security	141
Share Passwords and Passkeys	141
Get Help Avoiding Keychain Access	146
Use Keychain in Other Browsers	147
Use Keychain in Other Apps	154
Improve Communication Safety	156
Enable Sensitive Content Warnings	157
Set Granular Photo Permissions	158
Set Write-Only Calendar Permissions	158
Monitor Cameras & Screen Recording	160
Discover Other System Improvements	161
Accessibility	161
AirPods	164
Apple ID	165
Autocorrect	165
Copy Subject	166
Dictation	167
Game Mode	168
Family Sharing	169
Inline Typing Predictions	169
Emoji	171
Insertion Point.....	172
Live Text	173
PDF AutoFill	173
Screen Savers, Wallpaper, and Lock Screen	174
Screen Sharing	176
Siri	178
Visual Look Up	179
Explore Other App Improvements.....	181
Clock	181
Contacts	182
FaceTime	182
Find My	182
Freeform	184

Home	184
Mail	185
Music	187
Photos	187
Podcasts	188
Wallet	189
Weather	189
About This Book.....	190
Ebook Extras	190
About the Author and Publisher	191
Also by Joe Kissell	192
Copyright and Fine Print	193

Read Me First

Welcome to *Take Control of Sonoma*, version 1.2, published in March 2024 by alt concepts. This book was written by Joe Kissell and edited by Kelly Turner.

This book teaches you all about macOS 14 Sonoma, including how to upgrade from an older operating system and how to use the major new features.

If you want to share this ebook with a friend, we ask that you do so as you would with a physical book: “lend” it for a quick look, but ask your friend to buy a copy for careful reading or reference. Discounted [classroom and user group copies](#) are available.

Copyright © 2024, Joe Kissell. All rights reserved.

Updates and More

You can access extras related to this ebook on the web (use the link in [Ebook Extras](#), near the end; it’s available only to purchasers). On the ebook’s Take Control Extras page, you can:

- Download any available new version of the ebook for free, or buy any subsequent edition at a discount.
- Access the book in both PDF and EPUB formats. (Learn about reading on mobile devices on our [Device Advice](#) page.)
- Read the ebook’s blog. You may find new tips or information, as well as a link to an author interview.

If you bought this ebook from the Take Control website, it has been added to your account, where you can download it in other formats and access any future updates.

What's New in Version 1.2

Version 1.2 of this book updates it to cover changes in macOS 14.2, 14.3, and 14.4. The biggest changes in the book were:

- Added a sidebar, [Avoiding Dropbox Complications](#), about extra steps you should take in certain circumstances when upgrading your Mac if you also have Dropbox installed (and several references to that sidebar at appropriate points in the book)
- Updated descriptions of a few minor features with details that were unavailable when the previous version of this book was published
- In [Do More with Messages](#), mentioned several additional features, such as removing tracking codes from links and the option to [Verify Contact Identities](#)
- Updated the sidebar [Favicons \(and Emoji\) on the Favorites Bar](#) to reflect small interface changes in Safari
- Revamped and expanded [Use Keychain in Other Browsers](#) to include details about using both passwords and passkeys from your keychain in non-Safari browsers
- Added detail about how [PDF AutoFill](#) works in 14.2 or later
- Expanded [Screen Sharing](#) with more information about options for screen sharing between two M-series Macs
- Covered newly added features in the [Clock](#), [Mail](#), [Music](#), [Podcasts](#), and [Weather](#) apps

What Was New in Version 1.1

The version 1.1 update reflected changes that occurred during the late part of the beta testing process. It was up to date with the features available on Sonoma's release date, although some features still appeared incomplete or missing, necessitating a future update. The most significant changes were:

- Removed references to the betas that were no longer applicable
- Added a direct link to the Sonoma installer in the App Store; see [Obtain the Installer](#)
- Added the topic [Search and Navigation Improvements](#) to discuss getting around within System Settings
- In [Accessibility Settings](#), included more information about Spoken Content, Switch Control, Voice Control, and Zoom
- In [Enhance Video Conferencing](#), switched to Apple's new terminology for the Video menu bar icon and explained how to share a window or app right from within that app
- Described new methods you can use to improve audio recordings in Messages; see [Improve Your Audio Messages](#)
- Included instructions for more granular control of Safari extensions; see [Control Extensions Per Site](#)
- Mentioned new styles in Notes; see [Use New Styles](#)
- Explained a previously mysterious setting in Notes; see [Suggested Reminders](#)
- Added information about new systemwide features involving [AirPods](#), [Apple ID](#), [Copy Subject](#), [Family Sharing](#), [Emoji](#), [Insertion Point](#), and [Live Text](#)
- Described updates to the [Clock](#), [Contacts](#), [Freeform](#), [Mail](#), [Photos](#), [Wallet](#), and [Weather](#) apps

Introduction

Every summer, while most people are thinking about relaxing in the sun and going on vacation, I'm thinking about the next version of macOS. In June, Apple announces the next big revisions to all their operating systems, and your faithful Take Control authors get busy writing about them. For a number of years now, Josh Centers has been covering the latest iOS and iPadOS versions, Jeff Carlson has been digging into watchOS to keep his Apple Watch book up to date, and I've been responsible for writing about the new version of macOS.

macOS 14 Sonoma is a comparatively modest revision, much like last year's macOS 13 Ventura. It looks pretty much the same, and though it adds interesting features and drops support for certain older Mac models, it has no big architectural changes that threaten to leave thousands of apps incompatible or require massive developer effort to support. I expect that most people will find Sonoma to be a worthwhile and largely painless upgrade.

This book is your guide to what's new in Sonoma. I assume you have a basic grasp of Mac fundamentals already, so I don't explain things like what the Finder is, how to use the Dock, or where to find your apps. The focus here is on what's different from Ventura (and other recent versions of macOS).

As I've done for several years, I've incorporated into this book instructions for upgrading from earlier versions of macOS. I help you confirm that your Mac is compatible with Sonoma, walk you through all the preparatory steps, and guide you through the installation process.

Then the fun begins! I show you how to use the shiny new features and adapt to the many changes in Sonoma. I also tell you about some potential pitfalls and how to avoid or work around them.

The more I've learned about Sonoma, the more I like it. I think you will too, and I hope this book will help smooth your transition.

Sonoma Quick Start

You can read this book in any order, jumping to whatever topics interest you most. However, I recommend reading the first couple of chapters ([Take In the Scenic View](#) and [Adapt to Sonoma Changes](#)) first to get an overview, and if you're upgrading to Sonoma from an earlier version of macOS, you should go through the [Upgrade to Sonoma](#) chapter to ensure a smooth transition.

Learn about what's new:

- Discover what you have to look forward to when you upgrade to Sonoma, as well as what features were added (and removed) in the last several macOS versions. Read [Take In the Scenic View](#).
- Take a more detailed look at the new features and interface in [Adapt to Sonoma Changes](#).

Upgrade your Mac to Sonoma:

- Make sure your computer can run Sonoma. See [Check Your Mac for Compatibility](#).
- If you're upgrading from the Sonoma *beta*, read the sidebar [Upgrading from the Sonoma Beta](#).
- Follow detailed, step-by-step instructions to upgrade your Mac. See [Upgrade to Sonoma](#).

Dive in to the major new features:

- Improve your video calls and presentations with new features. See [Enhance Video Conferencing](#).
- Put widgets (even ones from your iPhone) right on your desktop. See [Work with Widgets](#).
- Manage chats, find messages, and access stickers more easily in Messages. See [Do More with Messages](#).
- Create profiles and improve your privacy while browsing the web. See [Meet Safari 17](#).

- View PDFs within Notes, link related notes, and move a note to Pages. See [Take Notes Further](#).
- Add sections to reminder lists, automatically categorize grocery lists, and get early notifications of tasks. See [Mind Your Reminders](#).
- Do more with passwords and passkeys, and lock down permissions to sensitive content. See [Manage Your Privacy and Security](#).
- Uncover smaller, miscellaneous changes in both system-wide technologies ([Discover Other System Improvements](#)) and specific apps ([Explore Other App Improvements](#)).

Take In the Scenic View

Since you’ve bought this book, I assume you’ve already decided to upgrade to Sonoma and don’t need convincing that it’s worth your time and effort. However, I would like to call attention to some of the biggest changes in Sonoma that you can look forward to, especially those I discuss in more detail later in this book.

In addition, if you’re upgrading from an operating system older than macOS 13 Ventura, you may be interested to know what other features were added along the way—as well as some that were removed.

Find Out What’s New in Sonoma

Apple has a list of new Sonoma features on [this webpage](#), and a longer, more detailed list in [this PDF](#). I won’t catalog them all here, but I will call out some of the most notable changes and improvements since macOS 13 Ventura:

- **Video conferencing:** People sharing their screens (for presentations or otherwise) via FaceTime, Zoom, and similar apps have some helpful new tools at their disposal. Those with the right kinds of hardware can also add visual reactions and make sure they stay in the frame. See [Enhance Video Conferencing](#).
- **Widgets:** You can now put widgets right on your desktop, rather than having to open Notification Center to see them. And you can even do this with widgets from your iPhone! See [Work with Widgets](#).
- **Messages:** Navigate long, multi-person conversations more easily; use filters to narrow down searches; share your location (or request someone else’s) within Messages; and more easily work with stickers. See [Do More with Messages](#).

- **Safari:** The new version of Safari lets you use profiles to separate your Safari data into multiple contexts, turn any website into a standalone app, share passwords and passkeys securely, and browse the web with greater privacy. See [Meet Safari 17](#).
- **Notes:** You can now view and navigate attached PDFs from within a note, add hyperlinks that take you from one note to another, and open a note for editing in Pages. See [Take Notes Further](#).
- **Reminders:** Add section headings to categorize reminders, let the app automatically arrange your grocery list, or get alerts before a scheduled task is supposed to occur. See [Mind Your Reminders](#).
- **Privacy and security:** Sonoma gives you a way to securely share passwords and passkeys, makes credentials in your keychain available to browsers and apps besides Safari, and gives you a number of other new privacy tools. See [Manage Your Privacy and Security](#).
- **System Settings:** Apple has done a fair amount of fiddling with what's in System Settings and where, even since the big shift from System Preferences in Ventura. See [Explore System Settings](#).
- **System-level improvements:** Among the many technologies in macOS that cross app boundaries, quite a few have seen significant changes: [Accessibility](#), [AirPods](#), [Autocorrect](#), [Dictation](#), [Game Mode](#), [Inline Typing Predictions](#), [PDF AutoFill](#), [Screen Savers](#), [Wallpaper](#), [and Lock Screen](#), [Screen Sharing](#), [Siri](#), and [Visual Look Up](#).
- **Other apps:** Smaller, but (mostly) welcome, changes have also appeared in numerous built-in apps, including [Clock](#), [FaceTime](#), [Find My](#), [Freeform](#), [Home](#), [Mail](#), [Music](#), [Photos](#), [Wallet](#), and [Weather](#).

Check Your Mac for Compatibility

All currently shipping Macs, as well as most models introduced within the past five years or so, can run Sonoma. Sadly, Sonoma does drop support for some Mac models that were able to run macOS 13 Ventura. The next few pages will help you verify that your hardware is fully compatible with Sonoma.

Model Support

Macs that can run Sonoma include the following:

- iMac (2019 or newer)
- iMac Pro
- MacBook Air (2018 or newer)
- MacBook Pro (2018 or newer)
- Mac mini (2018 or newer)
- Mac Pro (2019 or newer)
- Mac Studio

Unfortunately, that excludes the following models that were able to run Monterey, but can go no further:

- iMac (2017)
- MacBook (2017)
- MacBook Pro (2017 and 2018)

To confirm which Mac model you have, choose Apple  > About This Mac (and, if present, click More Info). You'll see something like **Figure 1** in Ventura or later, or like **Figure 2** in Monterey or earlier.



Figure 1: About This Mac (Ventura or later).



Figure 2: About This Mac (Monterey or earlier).

Upgrade to Sonoma

Up through 2019, I wrote an entire book every year on the process of upgrading to the latest Mac operating system. Now, rather than offering a separate *Take Control of Upgrading to Sonoma* book, I've condensed all my upgrading instructions into just this one (admittedly rather long) chapter. Although I've deliberately left out some details and background information from the book-length text, what follows should be more than enough to get you through the process.

If you've already upgraded to Sonoma, you can skip ahead to [Adapt to Sonoma Changes](#).

You Can (and Should) Skip Versions

Every now and then I get email from someone who hasn't upgraded macOS in a few years and wants to know whether they can jump straight from whatever they have to the latest system, or whether they must apply each major upgrade incrementally along the way.

I must admit that my first thought is always, "Why didn't you install each new version as it was released?" I have always—going back to the pre-Mac OS X days—installed every single update Apple has released, and I've never regretted that approach. You can do that too! Based on my decades of experience, my professional opinion is that it's not only safe, it's significantly less hassle than waiting years between upgrades.

Be that as it may, if you are running an older version of macOS and want to install Sonoma, then as long as your Mac is compatible (see [Check Your Mac for Compatibility](#)), you should just go for it. **To be crystal clear, you do *not* have to install every new release of macOS between the one you have and the one you want!** Even if your Mac is currently running, say, macOS 10.13 High Sierra, you can (and should) skip straight to macOS 14 Sonoma. No need to step through Mojave, Catalina, Big Sur, Monterey, and Ventura! The Sonoma installer doesn't care where you're starting, and you can save vast amounts of time and effort by upgrading straight to Sonoma!

Update Your Third-Party Software

Every major upgrade to macOS results in software compatibility problems, where some apps work poorly or won't launch. Most of us will have to update at least a few apps to make them work correctly under Sonoma. If history is any indication, some incompatible apps won't have an update available right away, and a few might never have one. But many developers work hard to ensure that their software is ready for each new version of macOS, and "Sonoma-compatible" software updates have already been appearing for months.

Tip: [RoaringApps](#) maintains a wiki listing thousands of Mac and iOS apps and the current status of their compatibility with various operating system versions (including Sonoma), as reported by users. Although this list is neither exhaustive nor definitive, it provides a quick way to check on the apps most important to you.

Check for 32-Bit Apps

If you're already running Catalina or later, there's nothing to see here—skip ahead to [Update Your Remaining Apps](#). But if you're using Mojave or earlier, you should check for 32-bit apps.

Like Ventura, Monterey, Big Sur, and Catalina before it, Sonoma requires 64-bit apps; older, 32-bit apps simply won't run. As a user, you don't need to know or care about the technical details differentiating 32-bit apps from 64-bit apps. What is relevant, however, is that if you're upgrading from Mojave or earlier, there's a good chance that one or more apps you use regularly won't work under Sonoma, and some of them may *never* work on any future version of macOS.

Thus, *before* you upgrade to Sonoma, you should find out which of your apps are still 32-bit apps and then, depending on what you learn, decide on appropriate steps. The easiest way to do so is to download the free [Go64](#) app. Open the app and click OK. After a few seconds, it lists all your 32-bit apps (including those, marked with an alert  icon, which contain one or more 32-bit components), along with

Adapt to Sonoma Changes

In later chapters, I cover specific apps that have seen significant changes, such as Messages and Safari, as well as new or improved systemwide technologies like Game Mode and Inline Typing Predictions. Before we get to those details, though, I want to walk you through a few big overall changes that may disorient you—especially if you weren’t previously running Big Sur or later.

Get Your Visual Bearings

In Sonoma, almost everything has the same overall look as in Ventura, Monterey, and Big Sur. If you’re upgrading from Ventura, nothing should be particularly surprising; feel free to skip ahead to [Explore System Settings](#). If you were previously using Monterey or Big Sur, you may want to read about [Stage Manager](#) and skip the rest, but if you’re upgrading from Catalina or earlier, I recommend reading everything in this chapter.

Windows

Windows, like menus, now have more widely spaced elements and are predominantly white (or translucent) with some gray accents. They also have much rounder corners than in Catalina and earlier. And the disclosure triangle (▸)—that little icon to the left of folders that you click to expand or collapse the view of what’s inside them—is now no longer a triangle: it’s more of a caret (⤵). So it’s called the *disclosure arrow* now.

There are also two other significant changes to windows:

- **Toolbars:** The toolbar is the area at the top of a window that typically contains icons for changing the view and performing actions on items in the window. In Catalina and earlier (**Figure 10**, top), it was a gray bar that extended across the entire window; in Big Sur and later (**Figure 10**, bottom), it’s a white area that begins

to the right of the sidebar (if any) and has subtler icons without borders that make them look like buttons.

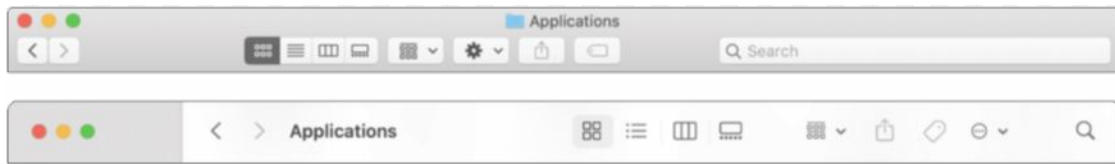


Figure 10: The toolbar of a Finder window in Catalina (top) and Big Sur or later (bottom).

- **Sidebar:** The sidebar (see **Figure 11**) in apps like the Finder, Mail, Notes, and Photos now extends all the way to the top of the window, and now features blue rather than gray icons for Favorites. (You can adjust the size of the text and icons in the sidebar by going to System Settings > Appearance and choosing Small, Medium, or Large from the “Sidebar icon size” pop-up menu.)

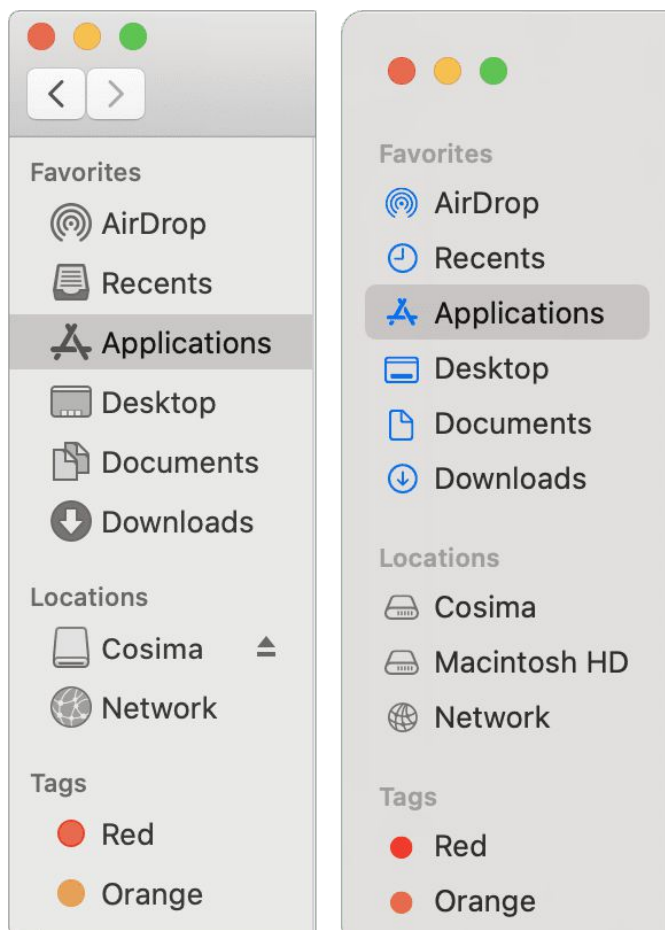


Figure 11: The sidebar of a Finder window as it appears in Catalina (left) and Big Sur or later (right).

Enhance Video Conferencing

The restrictions associated with the COVID-19 pandemic may have lifted, but video conferencing via FaceTime, Zoom, Microsoft Teams, and similar services is now a permanent part of our computing lives. (For example, before the pandemic, I often gave in-person presentations to Apple user groups, but nowadays, meeting via Zoom is nearly always assumed—and some groups no longer bother meeting in person at all anymore.)

Because so many people are using video conferencing to show presentations in apps like Keynote and PowerPoint, demonstrate things by sharing their screen, or otherwise spruce up what might be a boring “taking head” call, a number of apps have sprung up to provide more control than simply a shared window here and a tiny thumbnail of your face there. ([mmhmm](#) is a notable example.) Now Apple is getting into the game with features built into Sonoma that make video calls more interesting and effective.

Use Presenter Features

FaceTime, Zoom, and similar apps aren’t just about video and audio calls. They can also be used to share some or all of your screen with other participants. Whether you’re delivering a fancy Keynote or PowerPoint presentation to business colleagues, showing your friend a funny video, or demonstrating how to use an app, there are lots of situations in which you may take on the role of a presenter. Sonoma adds some impressive new features that can help in such situations.

Although these features are available to any video app, the exact steps to use them vary a bit from one app to the next. For the purpose of this book, I’ll illustrate using FaceTime.

Share Screens, Windows, and Apps

In Ventura and earlier, if you wanted to share a screen in FaceTime, your options were limited: you could share either a single window or the entire screen. Sonoma gives you the additional options to share multiple windows, a whole app, or multiple apps, and makes it easier for you to see exactly what you're about to share.

To initiate sharing within a video call, click the Video ( or ) icon on your menu bar to display controls for the video call in a pop-up window, then click the Screen Sharing  icon to show screen sharing options at the bottom (**Figure 20**). Or, you can click the Screen Sharing  icon at the bottom of the FaceTime window, which takes you to the same place in a single step.

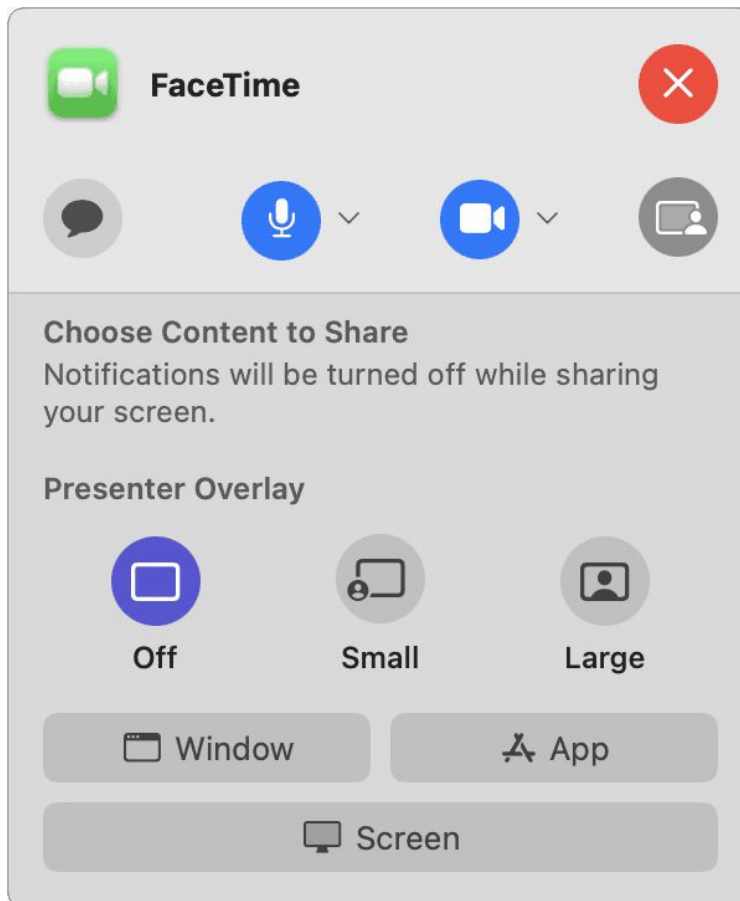


Figure 20: After you click the Screen Sharing icon, you can choose what type of content to share at the bottom of this window.

Note: Why two icons for Video? See [Monitor Cameras & Screen Recording](#), later in the book.

Work with Widgets

Widgets, those little blocks that give you a glimpse into certain apps or allow you to perform simple tasks, are not new. They started out in iOS and iPadOS and have been available in Notification Center since macOS 12 Monterey. Sonoma, however, adds interesting new capabilities to widgets: you can now put them right on your desktop, and even iPhone widgets can now be used on your Mac.

Before I can tell you about widgets, however, I have to explain some important (and, arguably, weird) changes to the way the desktop works.

Understand Desktop Changes

In most respects, the macOS desktop behaves as it always has. In the background is your wallpaper, which can be one of Apple's built-in static images, a dynamic graphic that changes over time (see [Screen Savers, Wallpaper, and Lock Screen](#)), or any other image you choose. You can put files or folders on the desktop and arrange them however you like. In reality, those files and folders live in a regular folder ([~/Desktop](#)), which you can navigate to in any Finder window. Essentially, you can think of the desktop itself as a big, full-screen window with a special background that shows the contents of that folder (always in icon view).

As you start exploring Sonoma, however, you may notice that whenever you click on an empty area of the desktop (not a file or folder), all your windows slide out of the way so that you see *only* the desktop and its contents (along with the Dock and menu bar). In other words, clicking on an empty spot on the desktop now does the same thing as the Show Desktop feature that's set, by default, to activate when you press F11 on your keyboard.

The first time you do this, you'll see a special notification at the top of your screen (**Figure 30**) explaining what's happening. (Apple describes this as “clicking the wallpaper” rather than “clicking an empty spot on the desktop”—tomatoes, to-mah-tos.) To bring back your windows, click the desktop again.

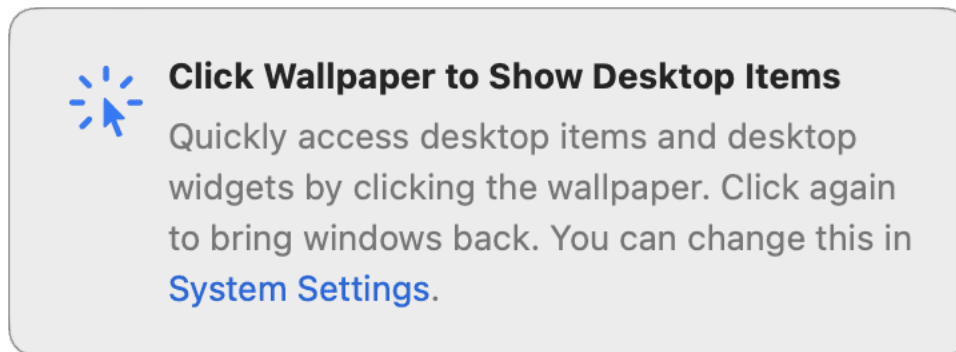


Figure 30: This notification attempts to set your mind at ease about all your windows disappearing when you click the desktop.

Apple is making it easier to see your desktop because it's now the default location for your widgets. But if you dislike this new behavior, you can revert to the way things were before by going to System Settings > Desktop & Dock and choosing Only in Stage Manager from the “Click wallpaper to reveal desktop” pop-up menu. (Set it back to Always for the default Sonoma behavior.) Either way, the F11 shortcut will still show the desktop.

Also on the Desktop & Dock pane is a new setting labeled Show Items. If you uncheck the “On Desktop” box, all those files and folders you put on your desktop will be hidden until you click on the desktop.

Use Widgets on Your Desktop

Now that you know why Apple went out of their way to make your desktop more visible, you can start filling it up again—this time with widgets! As has been the case since Big Sur, widgets are little panels that display information from various apps and system processes. For example, they can show you the current time or weather, upcoming calendar events, items on your to-do list, or the name of the song

Do More with Messages

Apple's Messages app offers much more than just text-based chat—and a way to figure out which of your friends use Apple devices (those with blue bubbles) and which don't (those with green bubbles). Messages can also be used for voice messages, screen sharing, sending documents, and more.

Tip: To read all about the “more,” see Glenn Fleishman's [Take Control of FaceTime and Messages](#).

Sonoma, iOS 17, and iPadOS 17 add some spiffy new features to Messages, though they are mostly geared toward people (I was tempted to say “young'uns”) who use Messages a lot differently than I do.

Note: A behind-the-scenes feature in Messages for Sonoma that's also present in Mail is link tracking protection: macOS strips out extra information from links that would be used to track you across the web (without hindering the URL's functionality).

Search Messages More Effectively

Searching in Messages has always been straightforward: click in the Search field on the left, type in whatever you're looking for, and wait for matches to appear. However, sometimes there are so many matches for your search term that you still have to wade through hundreds of messages to find the one you want. Messages in Sonoma helps this problem in two ways:

- **Search result categories:** Search results are now divided into categories, such as Conversations, Messages, Photos, and Links (depending on what the search actually returns). Within each category, Messages shows a handful of matches; if there are more, you can click Show More to view them; then click Show Less to hide the extra matches again.

- **Search filters:** You can narrow down a search by a person's name, type of message, or a combination of factors. To search with a filter:
 1. Start by typing part of a person's name into the Search field. Messages looks for matching names within the messages you've sent and received and displays a pop-up menu (**Figure 34**). Select the name or conversation you want.

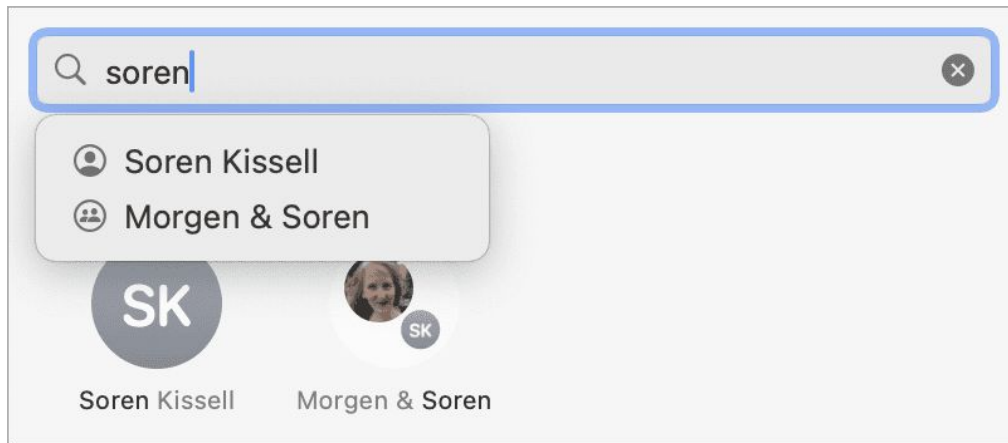


Figure 34: Start typing a name and Messages suggests matching people and conversations.

At this point, your search results contain only messages to or from that person.

2. As soon as you've selected a person, the pop-up menu changes to list other options (**Figure 35**). Choose *From Name* to limit the search to messages from that person (but not messages to them). Messages then adds "From" to the filter in the Search field.

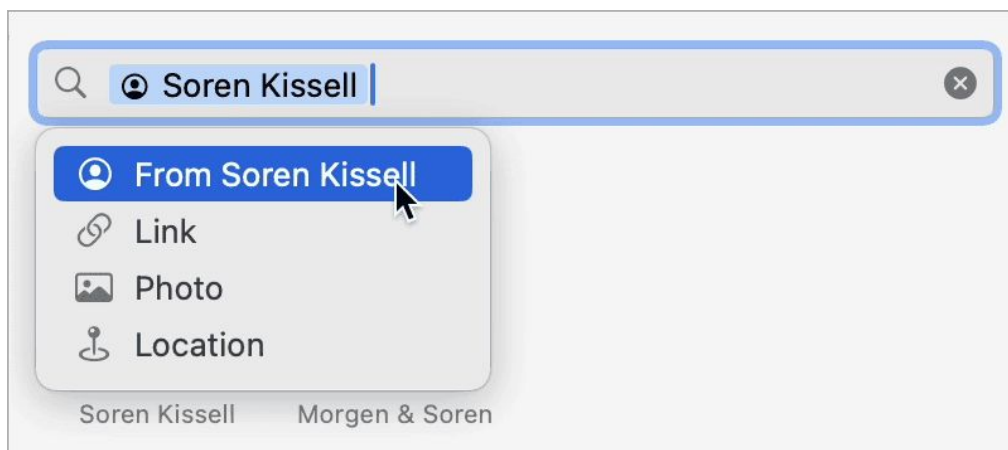


Figure 35: Make a search filter more specific by choosing *From Name* or adding another criterion.

Meet Safari 17

Safari 17 ships with Sonoma, and is also available as an optional download for Ventura and Monterey. Version 17 looks and acts very much like version 16, but with a few interesting new features. You can now create profiles in Safari to separate your data into different sandboxes, turn any website into a standalone app, and use Private Browsing mode with even greater confidence.

Note: Apple’s Sonoma preview page also says, “Search in Safari is more responsive than ever and shows easier-to-read and more relevant suggestions.” I can’t say I’ve noticed these changes, but that may be a function of what I search for.

Note: You know all those passwords Safari can autofill for you? Now you can share them with other people (see [Share Passwords and Passkeys](#)) and even access them from third-party browsers and other apps (see [Use Keychain in Other Browsers](#) and [Use Keychain in Other Apps](#)).

Use Multiple Profiles

As you browse the web in Safari, you may realize you have to access the same site in different contexts. For example, maybe you use two different Microsoft accounts—one for home and one for work—and you want to keep their data completely separate. Maybe you like to help build Jeff Bezos’s next mansion by buying Amazon products from two different country-specific sites. Or maybe you want to make sure the history of web searches you do for personal reasons are kept completely separate from those you do for school.

Safari 17 addresses situations like these by enabling you to create multiple *profiles*, each with its own browsing and search history, bookmark list, favorites, tab groups, extensions, passwords, and even

cookies. Whatever you do in one profile has no bearing on another, any more than if you were using two separate browsers.

To make a new profile:

1. Choose Safari > Create Profile or go to Safari > Settings > Profiles. The tab initially gives you some information about how profiles work (**Figure 41**).

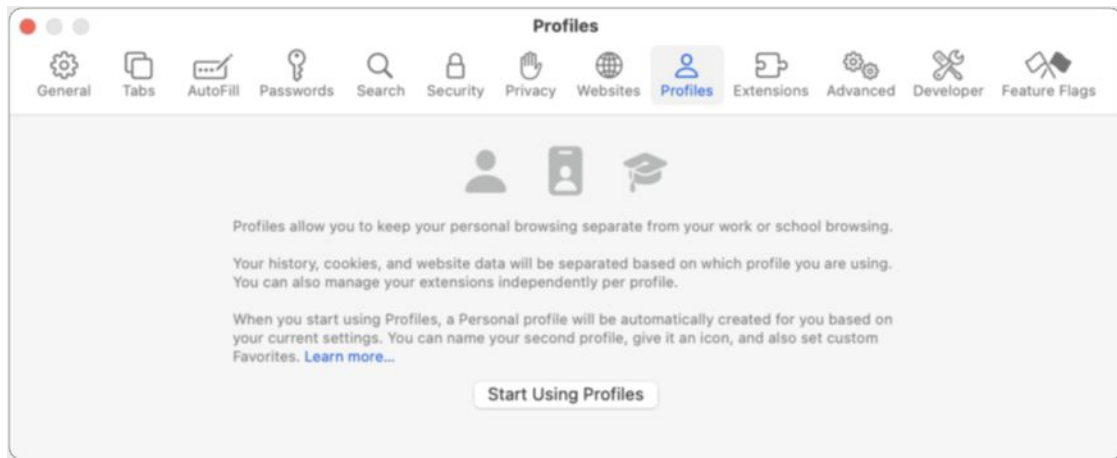


Figure 41: The Profiles tab in Safari Settings initially provides information about profiles.

2. Click Start Using Profiles.

Behind the scenes, Safari creates a default profile for you called Personal; this profile inherits all your tab groups, bookmarks, settings, cookies, history, and so on. What Safari now asks you to do is create a *second* profile.

3. A new dialog (**Figure 42**) appears.

Take Notes Further

Apple's Notes app has become increasingly powerful in recent years. It's now capable of much more than holding simple notes, with full support for styled text, lists, tables, graphics, attachments, tags, and more.

In Sonoma (as well as in iOS 17 and iPadOS 17, Apple takes Notes even further with four new features: expanded formatting options, better PDF support, a mechanism to link notes together, and a way to move a note to Pages for further editing.

Use New Styles

A new Block Quote command on the Format menu indents text and puts a bar to its left, so it can easily be identified as a quote. Also on the Format menu is a new Monostyled command, which replaces Monospaced, giving you fixed-width characters on a light gray background.

Work with PDFs in Notes

Although you could already drag a PDF into a note as an attachment, Notes previously showed just the first page of that PDF, zoomed as large as the note window; to view the contents of that document, you had to double-click it to open it in Preview. Now, however, you can flip through multi-page PDFs right in Notes.

With a PDF in a note, Notes shows you one or more pages side by side, depending on the width of the note window (**Figure 46**), and you can scroll left or right to view other pages.

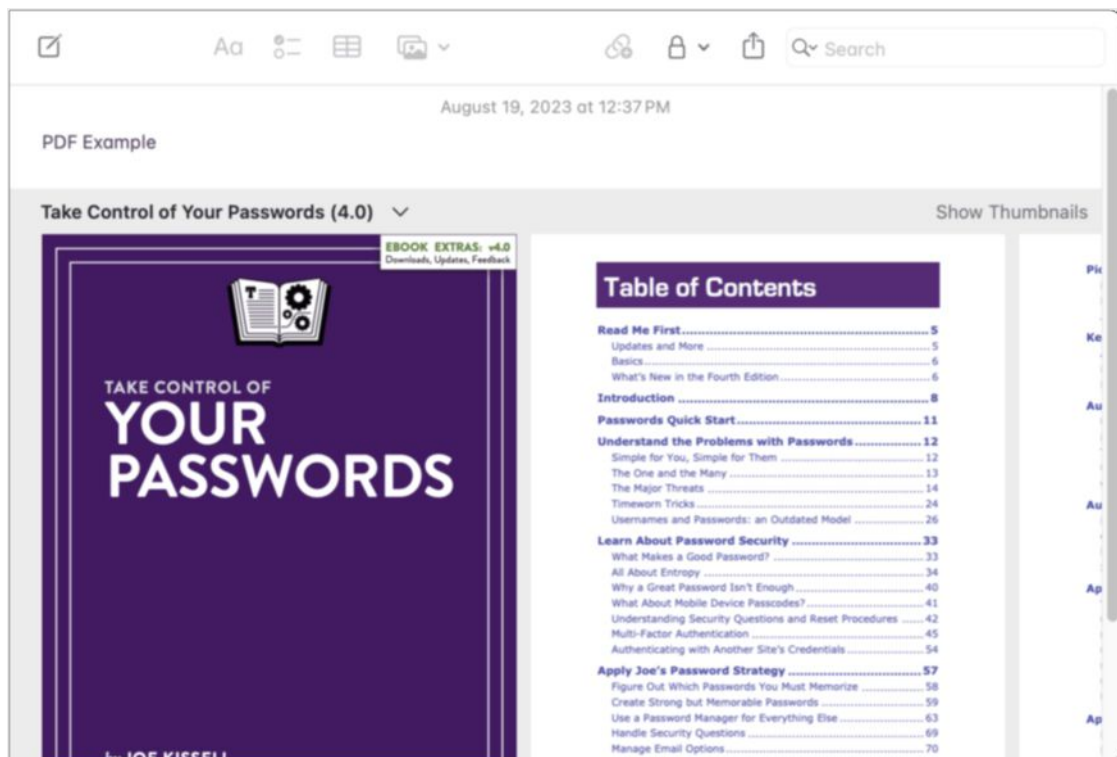


Figure 46: Scroll left or right to see a PDF's pages within Notes.

Click Show Thumbnails (**Figure 47**) and Notes shows smaller images of each page at the top of the PDF. Again, you can scroll left or right; then click a page to jump to it in the main PDF display.

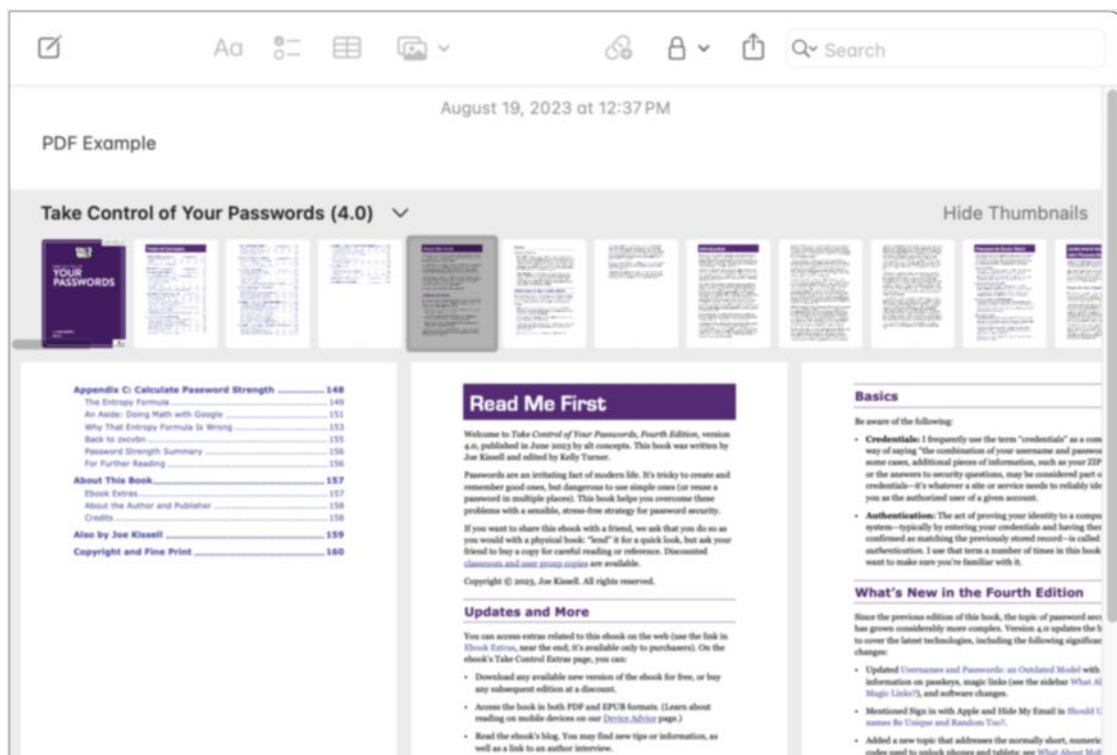


Figure 47: Click a thumbnail to go right to that page of a PDF.

Mind Your Reminders

The Reminders app—great for to-do lists, shopping lists, and other things you want to keep track of—has several new features in Sonoma.

Note: Glenn Fleishman plans to update [Take Control of Calendar and Reminders](#) to cover these changes.

Reminder Sections

Long reminder lists can now be divided into sections with headings, to help you find things more easily (**Figure 50**).

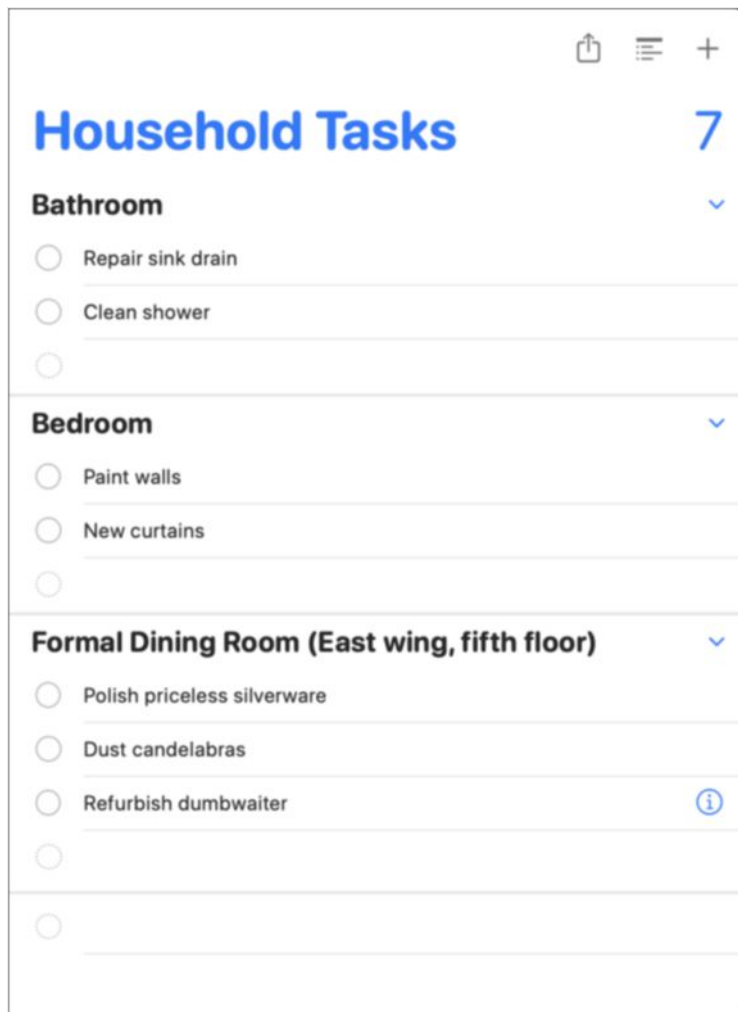


Figure 50: A list with added sections may look something like this.

To add a new section, choose File > New Section or click the New Section  icon on the toolbar, then type a name for the section. Notes automatically adds a blank entry underneath. You can drag existing items into different sections or move them by right-clicking (or Control-clicking) them and choosing Move to Section > *section name* from the contextual menu.

Column View

If your list includes multiple sections, you may prefer to view it as a series of columns rather than as a single scrolling list. To do so, choose View > As Columns; you'll see something like **Figure 51**. To return to List View, choose View > As List.

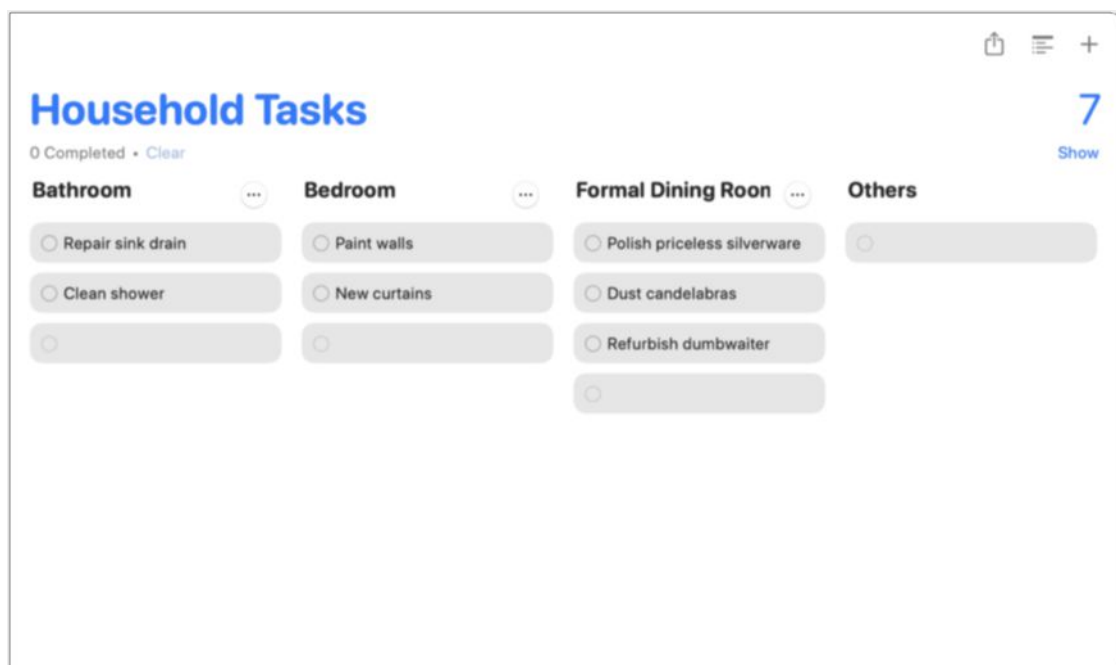


Figure 51: The same list as in the previous figure, but this time in Column View.

Automatic Grocery List Sorting

Not only does Reminders let you manually arrange lists into sections, it can also do that for you automatically if the list contains groceries.

Manage Your Privacy and Security

Privacy means that personal information, including what you say and do on your devices, is known only to you and to the other people or companies you *intentionally* share it with. Security means your hardware, software, and data are protected from harm or intrusion. In the same way that locking your door can improve both your privacy and security at home, the things we do to make our devices more secure often give us more privacy as a side effect—and vice versa.

Because the “bad guys”—which could be gigantic corporations, shady hacker groups, identity theft rings, or bored teenagers on the other side of the world—are constantly upping their game to find new ways of stealing your personal information, spying on you, or simply causing mischief, Apple builds new privacy and security features into each release of macOS.

Earlier I told you about privacy improvements to Safari (see [Browse More Privately](#)), but other changes in Sonoma transcend app boundaries. In this chapter I begin with a look at features involving passwords, passkeys, and your keychain. Then I turn to other systemwide features that restrict what types of information are available to whom.

Share Passwords and Passkeys

As you browse the web using Safari (and, from now on, other browsers too; see [Use Keychain in Other Browsers](#)) you probably log in to lots of websites, and if you allow Safari to remember your username and password, it stores those credentials in a systemwide keychain. Although you can sync those credentials across your own Apple devices using iCloud, until now, there was no secure way to share them with other people, such as trusted family members. Starting in Sonoma, iOS 17, and iPadOS 17, there is.

Password sharing is based on *groups*. You can create just one group or several, and each group can contain one person (besides yourself) or many. You create groups first, and then choose which passwords you want that group to be able to share. When you do this, you actually move those passwords into a separate group within your keychain. You still have complete control of them; you can change them, delete them, or move them out of the shared group (or into another) whenever you like. If you change a shared password, it's changed not just for you but for everyone else in the sharing group, too.

Follow these steps:

1. Go to System Settings > Passwords and authenticate with Touch ID, your Apple Watch, or a password. You'll see a new Share Passwords with Family section (**Figure 56**). (The wording is a bit misleading, in that you can share passwords with anyone—but Apple does make it extra easy to share passwords with people in an existing Family Sharing group.)

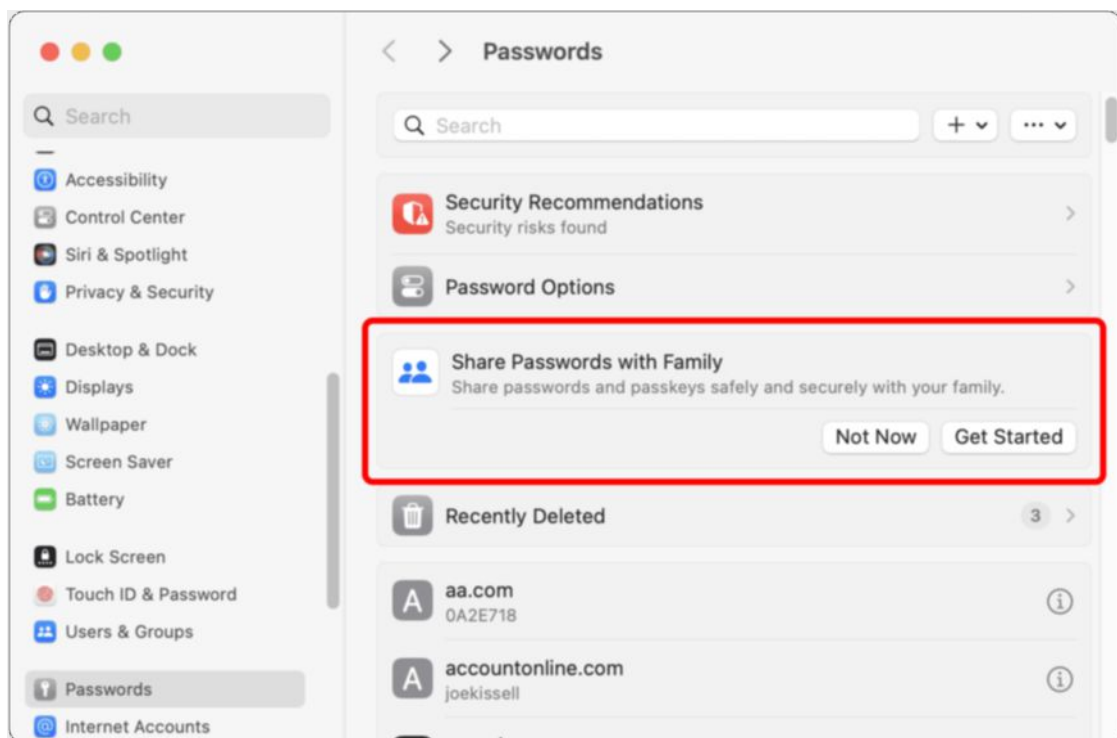


Figure 56: To share passwords with your family—or anyone else—click the Get Started button.

Discover Other System Improvements

In addition to the bigger features that each deserved their own chapter, Sonoma includes dozens of smaller (but sometimes quite significant) changes. In this chapter, I offer a quick overview of new things that apply to multiple apps or to the system as a whole. (For app-specific changes, see the next chapter, [Explore Other App Improvements](#).) Although I don't catalog every tiny change, I attempt to hit the most important highlights.

Features are listed here alphabetically, not in order of importance.

Accessibility

Sonoma brings fewer changes to accessibility options than recent macOS updates, but they're interesting and useful:

- **Live Speech:** If you're unable to speak (or have limited speech ability), participating in FaceTime calls, Zoom meetings, and the like can be awkward at best. The new Live Speech feature in Sonoma, iOS 17, and iPadOS 17 lets you type what you want to say, and a synthesized voice then reads it aloud to the other participants. (You can also use it in person, with the sound coming directly from your Mac's speakers.) You can choose from any of Apple's numerous voices—or even your own, if you previously created a speech model with Personal Voice (per the next bullet point).

To configure Live Speech, go to System Settings > Accessibility > Live Speech and turn on the Live Speech switch. Then choose a language and a voice from the pop-up menus. (You can also choose Manage Voices from the bottom of the Voice pop-up menu to hear samples of the many voice options and download any you're interested in using.) Optionally change the font size of the interface in

which you'll type text to be spoken. And, to add phrases you can “speak” with just a couple of clicks, click the plus  icon under Saved Phrases.

After that setup, you can use Live Speech either in apps or in person by clicking the Live Speech  icon on your menu bar. When you do this, a floating window (**Figure 72**) appears. Click in this window, type what you want to say, and press Return (or click the play  icon). Or, to use one of your saved phrases, click the bookmark  icon, select the phrase, and press Return.



Figure 71: Type in this window to use Live Speech.

- **Personal Voice:** This feature is designed for people who face the likelihood of losing their voice (or experiencing progressive speech impairments). It lets you record samples of your voice that are then used to create an artificial voice that sounds like you. You can then use your own voice by typing—either in person or using audio/video calling apps.

To create a Personal Voice, go to System Settings > Accessibility > Personal Voice. Click Create a Personal Voice and follow the prompts. You'll have to spend about 15 minutes reading 150 different phrases aloud, and then wait (sometimes as long as several hours) while your Mac processes those recordings and builds the speech model. Once it's done, you can optionally turn on “Share across devices” so you can use the same voice on your iPhone, iPad, or another Mac; or “Allow applications to use your Personal Voice” to make the voice available to apps such as FaceTime.

Having created a Personal Voice, you can then use it (in person or in audio/video chats) via Live Speech (see the previous bullet).

Note: When you use Personal Voice in an app for the first time, macOS prompts you to grant that app permission.

Explore Other App Improvements

The previous chapter, [Discover Other System Improvements](#), reviewed changes in Sonoma that affected the entire system or multiple apps. In this final chapter, I walk you through some of the most interesting changes to specific apps.

Once again, I cover these in alphabetical order, not in order of importance.

Service-Based App Changes

Many of Apple’s built-in apps retrieve portions of their content in real time over the internet. For example, even if you don’t subscribe to Apple Music for streaming music and instead have all your tracks stored locally, the Music app’s Radio and iTunes Store views show you whatever Apple’s servers decide you should be seeing in those categories at any moment. Similarly, the Books, Maps, News, Podcasts, Spotlight, and TV apps can change what they display and how based on whatever the underlying services send to the apps—even if the apps themselves are unchanged.

Apple made several such changes after the release of Sonoma, but because they didn’t require updates to the apps themselves or modify their intrinsic functionality, I don’t list them in this chapter.

Clock

Starting in macOS 14.2, the Clock app can have multiple timers going at the same time, each with a label so you know what it’s for. You can also use presets to quickly create a timer with a common duration, and see a list of recent timers you can reuse.

To add a timer, go to the Timers tab in the Clock app, click the plus  icon, and choose Custom Timer (for a timer with new parameters), a

preset (from 1 minute to 2 hours), or a recent timer. You can optionally type a name for each timer in the Timer field below the time display.

Recent timers also appear at the bottom of the window.

Contacts

You can now add pronouns to any contact's card; choose Card > Add Field > Pronouns to do so. These pronouns are stored on your Mac, and if you share that contact record, they will not be included in the shared data.

FaceTime

Although the FaceTime itself doesn't have any significant new features in Sonoma, it benefits from all the systemwide videoconferencing features (see [Use Presenter Features](#)) as well as animated reactions, keeping yourself in the frame, and fine-tuning Portrait and Studio Light effects (see [Enhance Video Calls](#)).

Find My

Three new Find My-related features appear for the first time in Sonoma, iOS 17, and iPadOS 17:

- **Share AirTag or accessory data:** If you have any AirTags or third-party items that use the Find My network, you can now share their location data with up to five other people. When you do this, the other people can locate the item in the Find My app (and even make it play sounds), but won't receive [unwanted tracking](#) notifications.

To share an item's location with someone else, open Find My, click the Items tag, and select the item. Click the item on the map, and then click the Info ⓘ icon. Under Share This *Item Name*, click Add Person. A dialog (**Figure 83**) reminds you about what will happen.

About This Book

Thank you for purchasing this Take Control book. We hope you find it both useful and enjoyable to read. We welcome your [comments](#).

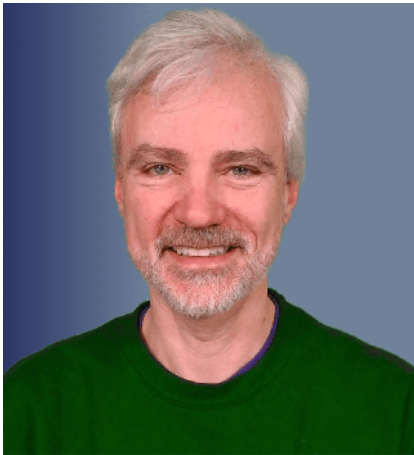
Ebook Extras

You can [access extras related to this ebook](#) on the web. Once you're on the ebook's Take Control Extras page, you can:

- Download any available new version of the ebook for free, or buy a subsequent edition at a discount.
- Access the book in both PDF and EPUB formats. (Learn about reading on mobile devices on our [Device Advice](#) page.)
- Read the ebook's blog. You may find new tips or information, as well as a link to an author interview.
- Find out if we have any update plans for the ebook.

If you bought this ebook from the Take Control website, it has been automatically added to your account, where you can download it in other formats and access any future updates.

About the Author and Publisher



Joe Kissell is the author of more than 60 books and hundreds of articles about technology. In 2017, he also became the publisher of Take Control Books, when alt concepts—the company he runs along with his wife, Morgen Jahnke—acquired the Take Control series from TidBITS Publishing Inc.’s owners, Adam and Tonya Engst. Before he began writing full-time in 2003, Joe managed software development for a living. He holds a bachelor’s degree in Philosophy and a master’s degree in Linguistics.

In his hypothetical spare time, Joe likes to walk, cook, eat, and practice tai chi. He lives in Saskatoon, Saskatchewan, Canada, with Morgen and their sons. To contact Joe about this book, [send him email](#) and *please* include [Take Control of Sonoma](#) in the subject. You can also sign up for [joeMail](#), his low-volume mailing list, follow him on Mastodon ([@joekissell](#)), or visit his blog at [JoeKissell.com](#).

Credits

- Publisher: Joe Kissell
- Editor: Kelly Turner
- Cover design: Sam Schick of [Neversink](#)
- Logo design: Geoff Allen of [FUN is OK](#)

Also by Joe Kissell

Click any book title below or [visit our web catalog](#) to add more ebooks to your Take Control collection!

[*Take Control of 1Password*](#): Slowed down by entering passwords repeatedly? Learn how to let 1Password do the heavy lifting.

[*Take Control of Apple Mail*](#): Learn the ins and outs of Apple's email app in macOS, iOS, and iPadOS.

[*Take Control of Automating Your Mac*](#): Work more efficiently on your Mac with time-saving shortcuts of all kinds.

[*Take Control of Backing Up Your Mac*](#): Protect your valuable data with a complete, bulletproof backup strategy.

[*Take Control of DEVONthink 3*](#): Master this powerful information management tool.

[*Take Control of iCloud*](#): Make the most of Apple's online service for storing, syncing, and sharing data.

[*Take Control of the Mac Command Line with Terminal*](#): Master your Mac's command-line interface and learn basic Unix skills.

[*Take Control of Your Digital Legacy*](#): Make sure your important digital information is preserved for future generations.

[*Take Control of Your Online Privacy*](#): Learn what's private online (not much)—and what to do about it.

[*Take Control of Your Paperless Office*](#): With your Mac and scanner, you'll clear the chaos of an office overflowing with paper.

[*Take Control of Your Passwords*](#): Overcome password overload without losing your cool.

Copyright and Fine Print

Take Control of Sonoma

ISBN: 978-1-990783-31-9

Copyright © 2024, Joe Kissell. All rights reserved.

[alt concepts](#), 419 8B-3110 8th St. East, Saskatoon, SK S7H 0W2 Canada

Why Take Control? We designed Take Control electronic books to help readers regain a measure of control in an oftentimes out-of-control universe. With Take Control, we also work to streamline the publication process so that information about quickly changing technical topics can be published while it's still relevant and accurate.

Our books are DRM-free: This ebook doesn't use digital rights management in any way because DRM makes life harder for everyone. So we ask a favor of our readers. If you want to share your copy of this ebook with a friend, please do so as you would a physical book, meaning that if your friend uses it regularly, they should buy a copy. Your support makes it possible for future Take Control ebooks to hit the internet long before you'd find the same information in a printed book. Plus, if you buy the ebook, you're entitled to any free updates that become available.

Remember the trees! You have our permission to make a single print copy of this ebook for personal use, if you must. Please reference this page if a print service refuses to print the ebook for copyright reasons.

Caveat lector: Although the author and alt concepts have made a reasonable effort to ensure the accuracy of the information herein, they assume no responsibility for errors or omissions. The information in this book is distributed "As Is," without warranty of any kind. Neither alt concepts nor the author shall be liable to any person or entity for any special, indirect, incidental, or consequential damages, including without limitation lost revenues or lost profits, that may result (or that are alleged to result) from the use of these materials. In other words, use this information at your own risk.

It's just a name: Many of the designations in this ebook used to distinguish products and services are claimed as trademarks or service marks. Any trademarks, service marks, product names, or named features that appear in this title are assumed to be the property of their respective owners. All product names and services are used in an editorial fashion only, with no intention of infringement. No such use, or the use of any trade name, is meant to convey endorsement or other affiliation with this title.

We aren't Apple: This title is an independent publication and has not been authorized, sponsored, or otherwise approved by Apple Inc. Because of the nature of this title, it uses terms that are registered trademarks or service marks of Apple Inc. If you're into that sort of thing, you can view a [complete list](#) of Apple Inc.'s registered trademarks and service marks.