

## February 19, 2017, Beginners SIG

### Editing Documents On Your Mac (Part 3 of 3)

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*Note: This discussion is based on MacOS, 10.2.2 (Sierra). Some illustrations may differ when using other versions of macOS or OS X.*

*Credits: Use Text Replacement on Mac to Type Faster (iphonehacks.com); Stop your Mac from inserting a period when you double-press the Space bar (iDownloadBlog); Edit Your Custom Dictionary File (The Mac Observer); Capitalize Words and Add Periods Automatically in Mac OS (OSXDaily); macOS: Using the Text "Transformations" Feature (The Mac Observer); Take Control of Pages (TidBITS Publishing Inc.); and Apple Help Guidance*

Whether it's an email message or an article for a newsletter, we all may find a need to do some editing of what we compose. At the September 2016 Double Click meeting, I presented the initial review about "Editing Documents on Your Mac (Part 1)" and followed up with Part 2 at the January 2017 meeting.

This month, I'll finish that review (Part 3) with a discussion about some advanced editing techniques using your Mac, again using Apple's Pages apps to demonstrate.

First, however, here's a brief review of some of the editing techniques from Part 2 ([Find and Replace](#), [Text Clippings](#), [Text Expansion](#), [Direct Text Copy](#), and [Typing Special Characters](#)). The summary still needs several pages, so feel free to skip ahead to the Part 3 discussion on page 4.

*Note: While most of these techniques work everywhere, some are application dependent and may not work in all apps. Also, there are lots and lots of these editing techniques. You won't remember them all, but you'll become familiar with and use some of them.*

### Editing Documents on Your Mac (Part 2 of 3) Review

#### Find and Replace

Find. The [Find](#) command (keyboard shortcut: [Command-F](#), [⌘-F](#)) is found in the [Edit](#) menu of an app used to produce documents. Depending on the app that you're using, it may be combined with an entire Find and Search menu ([Find...](#), [Find Next](#), [Find Previous](#), and possibly [Find and Replace](#)). Search once with the basic [Find](#) command ([Command-F](#), [⌘-F](#)). Depending on the app, either the first Find search result will be highlighted, or all of them may be highlighted. Continue to the next Find search result (and the next one, and the next one, etc.) by using the [Find Next](#) command ([Command-G](#), [⌘-G](#)). Search for previous Find search results by using the [Find Previous](#) command ([Shift-Command-G](#), [⇧-⌘-G](#)).

Replace. The [Replace](#) command (keyboard shortcut varies, depending on the app) is linked to the Find command. First you search with [Find](#); then you [Replace](#) the Find search result with something else. Depending on the app being used, [Find](#) and [Replace](#) may be separate commands, or they may be combined into a single [Find & Replace](#) command. In addition, Find & Replace may bring up or be part of a separate dialog box.

#### Text Clippings

Use the [Text Clippings](#) feature to grab some text from one document (the "source" such as a Pages document, webpage, email message, etc.) for use somewhere else in another document (the "target").

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Saving a Text Clipping. To save the Text Clipping, first select the text you want. Then after you've it selected, click and hold on the selection and drag the entire bit of text over to the Finder, either into a Finder window or simply onto the Desktop. The name given to the text clipping is based on the text that was clipped. Long text will be truncated to form the name.

Viewing a Text Clipping. Once the Text Clipping has been saved, it can be opened like any other file in the Finder (double-click, choose [Open](#) from the Finder's Edit menu, use the keyboard shortcut ([Command-O](#), [⌘-O](#))). A Finder window will be opened, showing the contents of the Text Clipping. You can also view text in the Text Clipping by using [Quick Look](#). (Just select the Text Clipping and tap the [Space Bar](#) to open up the Quick Look window.) You can [select all of a Text Clipping or only a portion](#) as you wish. Then you can [Copy](#) and [Paste](#) the selection into another document. Note, however, that you [can't edit the Text Clipping](#) (no change in formatting and no ability to cut something out).

Drag a Text Clipping. You can also [drag a Text Clipping](#) into a document to paste its entire contents into the document.

Formatted Text in a Text Clipping. If you create a Text Clipping containing some [formatted text](#) ([Bold](#), [Italic](#), [Underline](#), [Size](#), and [Color](#)), this formatting will be included in the clipping. When the Text Clipping (or part of it) is copied or inserted into a document, it does so using the formatting of the [source](#) document and [may not match](#) that of the [target](#) document (depends on the application that created the target). Because of this pasting uncertainty, you may find that you need to use the target application's [Paste and Match Formatting](#) option if available.

### Direct Text Copy (Source Document to Target Document)

It's possible to copy text from one document (the "[source](#)") to another (the "[target](#)") in a couple of ways. (Because of the differences in applications, formatting and/or font size from the source may or may not carry over to match that found in the target.) Perhaps the easiest way to move a text selection from one document to another (assuming that both are conveniently available and displayed) is to simply [make a selection in the source document and drag it to the desired location in the target document](#). Of course, instead of dragging the text selection from one document to another, you can simply [Copy](#) the selection from the source document and then [Paste](#) it in the desired location in the target document.

### Typing Special Characters

Your Mac keyboard gives you the ability to type more than just lowercase and uppercase characters (letters, numbers and a few special characters like [@](#)). Pressing the [Option](#) and [Shift-Option](#) keys provides access to numerous other characters, character accents and Emoji (graphic picture symbols). You can see what's available on your keyboard by displaying Apple's [Keyboard Viewer](#) (and also the [Emoji Viewer](#)).

Add an icon  for these two viewers to the Menu Bar by checking the "[Show keyboard and Emoji viewers in menu bar](#)" setting in the [Keyboard System](#)

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**Preference.** Then simply tap the new menu bar icon to show the two menu items in the resulting dropdown menu. Select the “[Show Keyboard Viewer](#)” item to display it. By pressing the [Option](#) and [Shift-Option](#) modifier keys, the viewer will display the available symbols overlaid on the keyboard keys.

**Accent Marks.** Certain character accent marks (also known as “diacritical” marks) are highlighted in the [Keyboard Viewer](#) when the [Option](#) key is pressed. These accents are symbols added to vowels to indicate a different pronunciation than the character is usually given. (Example: Add the acute accent to each character “e” in the word [resume](#) by pressing [Option-e](#) (result: [résumé](#).)

Another way of adding accents is to simply hold down the desired vowel key for a couple of seconds for the vowel to be accented. A list of available accent marks is presented just above the letter, and each one is marked with a number. Just press the number for the accent that you wish to use, and it will be added. The availability of symbols depends on the word-processing program and the font that you are using. Some symbols may not be available.

**Special Characters.** Use the [Option](#) key to generate special characters. There are lots of them. Here are a few common ones:

- [Option+8](#) ..... Bullet symbol (•)      • [Option+0](#) ..... Degree symbol (°)
- [Option+v](#) ..... Checkmark (✓)      • [Option+Semicolon](#) ..... Ellipsis (...)

Press the [Shift](#) key along with the [Option](#) key, and more symbols are available. Here are a couple of them:

- [Option+Shift+2](#) ..... Euro symbol (€)      • [Option+Shift+K](#) ..... Apple symbol (🍏)

**Emoji and Symbols.** Even with using modifier keys, the number of special characters from the keyboard is limited. As of OS X 10.10 (Yosemite), the number of special characters of almost any sort was made available via the [Emoji & Symbols Viewer](#). Look under the [Edit](#) menu in your app for the [Emoji & Symbols](#) menu item (or possibly [Special Characters](#)). You can also use the keyboard shortcut: [Command-Control-Space](#) (⌘-^ -Space) (application dependent) to bring up a list of them in the [Small Viewer](#) (see below).

**Two Viewers.** The macOS has two symbol viewers:

- **Small Viewer** – I call the first one the Small Viewer because of its small size window. It can be brought up with the keyboard shortcut: [Command-Control-Space](#) (⌘-^ -Space). The Small Viewer window can’t be resized, but it can be moved around on your screen by dragging any part of its window. It contains 13 groups of various symbols and characters available by scrolling through the window’s contents, by selecting one of the groups from the list at the bottom of the window, or via the window’s Search box. Close the Small Viewer by clicking its Close box (and sometimes the Escape, [esc](#), key). Switch to the Large Viewer (see below) by clicking on the viewer icon  in the upper right corner of the window.
- **Large Viewer** – I call the other viewer the Large Viewer because it can be resized (to even fill your screen if you wish). Like the Small Viewer, it contains 13 groups of various symbols along the left window pane and also a Search box

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at the top of the window. Within each group are found many symbols and variations of them. Bring up the Large Viewer by tapping the viewer icon in the Menu Bar and choosing the [Show Emoji & Symbols](#) option. Close the Large Viewer by clicking its Close box. Switch to the Small Viewer by clicking on the viewer icon  in the upper right corner of the Large Viewer window.

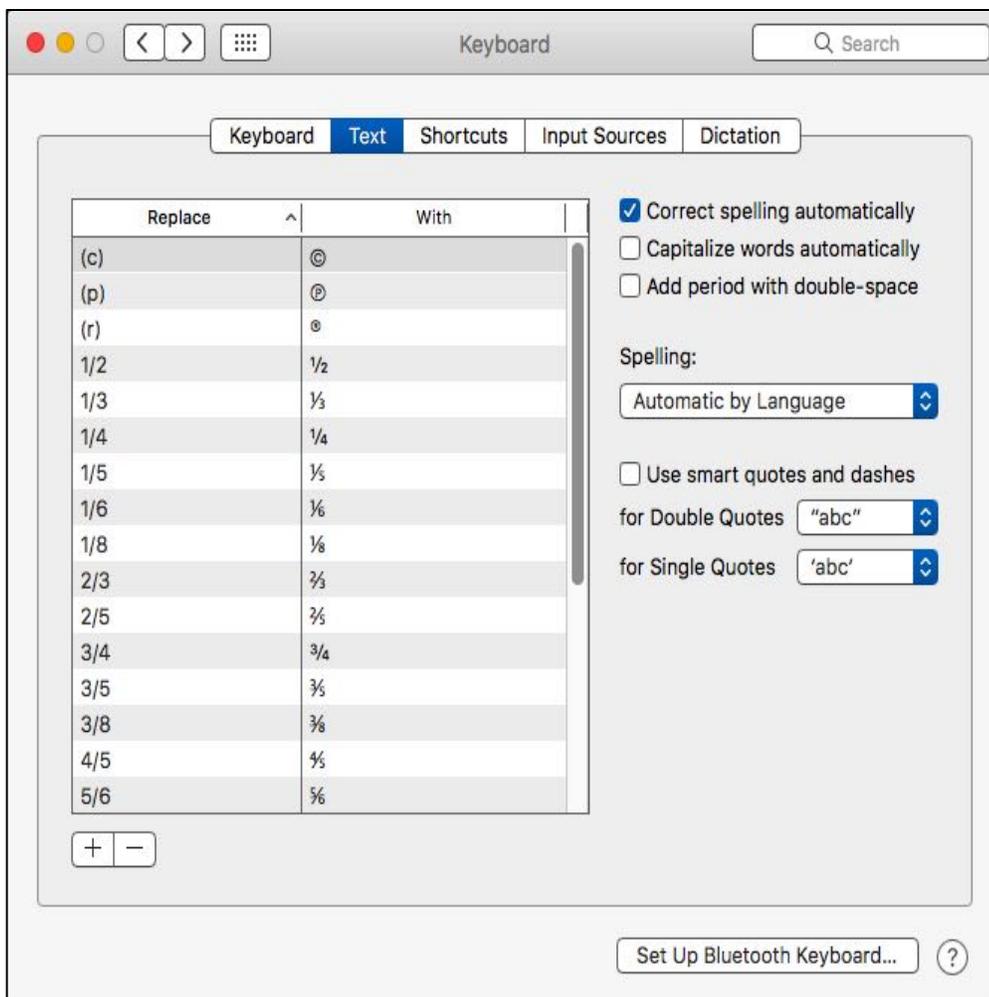
## Editing Documents on Your Mac (Part 3)

### Text Replacement/Expansion

Text expansion (also known as text replacement, or text substitution) is a process of typing a shortcut—the “[trigger](#)”—that is automatically converted to a longer string of text and/or symbols by macOS—the “[action](#)” in response to the shortcut.

For example, let’s say I type in “[sss](#)” and because I’ve set it up in a particular way, it will automatically type the closing ([--Steve](#)) that I use in emails and other correspondence right after I hit the Space Bar.

[Keyboard/Text Replacement System Preference](#). To get started, select [System Preferences](#). Then select the [Keyboard](#) system preference and choose the [Text](#) tab:



Keyboard System Preference (Text Tab)

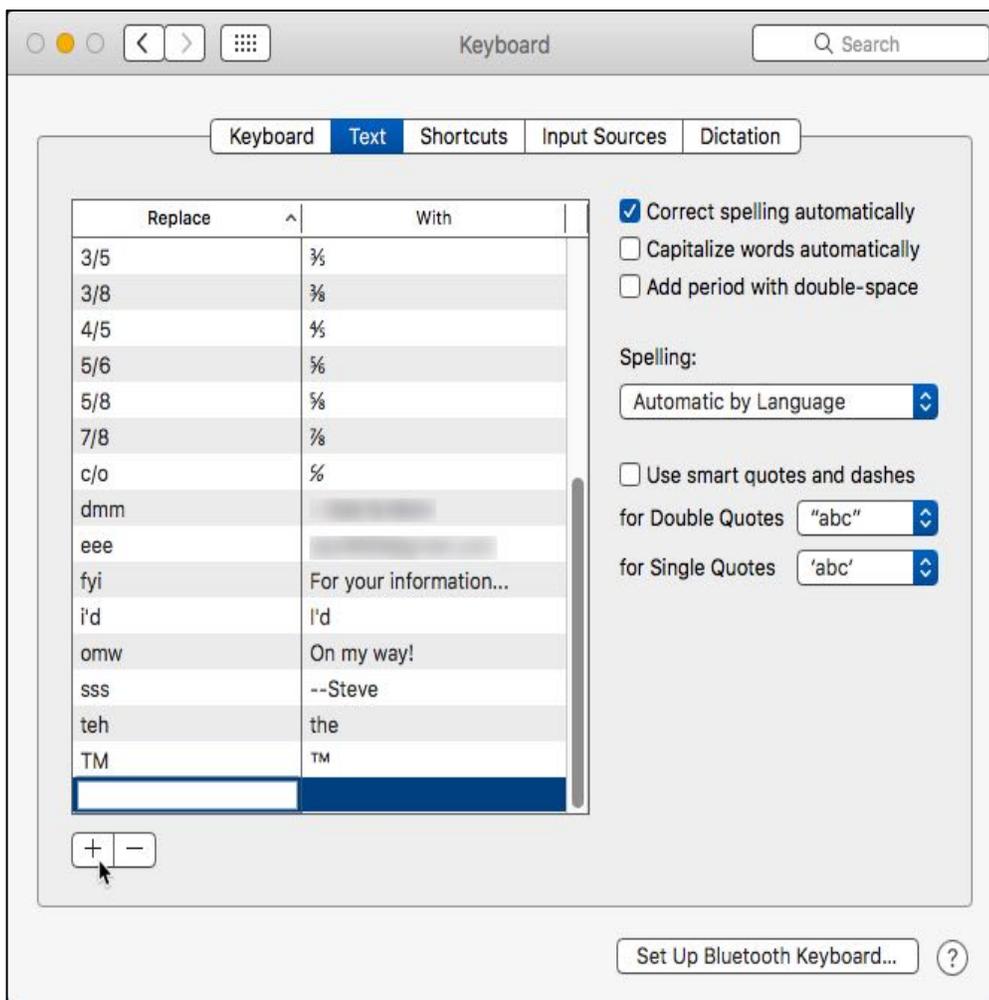
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The pane in the left of the window has two columns (lists): **Replace** and **With**. Whenever you type an item—the “**shortcut**”—in the **Replace** list, that item is replaced—the “**action**” in response to the shortcut—with its counterpart from the **With** list. Depending on the applications that you’re using and the macOS setup, the Replace list may come populated with shortcuts for symbols and a number of them for fractions. My setup is shown in the preceding illustration.

*Aside:* You’re likely familiar with two of the symbols: ©, the international copyright symbol, and ® for registered trademark. The other symbol, ℗, probably isn’t well known outside the music industry. It’s known as the “phonorecord” and is sometimes used instead of the copyright symbol.

**Create a Text Replacement.** To create a text replacement, click the **+** button at the bottom of the window. A blank entry space is then displayed at the bottom of the Replace/With pane. Then just type your **Replace shortcut** and a **With text entry**. Below are a few that I’ve created:



#### Keyboard System Preference (Text Tab) – Create Text Replacement

For example, you might find that you occasionally type “**teh**” when you meant to type “**the**” instead. To autocorrect for this, just put “**teh**” as the **Replace** shortcut and “**the**” in the corresponding **With** entry.

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Trigger the Text Replacement. To trigger a text replacement, simply type the shortcut, either by accident as shown in the example above or by intention when you want to automatically enter the text substitution such as the “fyi” entry in the window above. Then once you follow the trigger shortcut with a space character or a punctuation character (period, comma, etc.), the text substitution is entered.

In most programs, once you type the trigger shortcut, a small “substitution box” will appear below your entry to show what the text substitution will be. (See the illustration below.) You can use the [Down](#) arrow to select it and then type the [Return](#) or [Enter](#) key. While this works, it’s simpler to just type a space or a punctuation character to perform the text substitution.



#### **Text Replacement “Substitution Box”**

Remove a Text Replacement. Select a [Replace/With](#) pair and then click the [–](#) button.

Troubleshooting Text Replacement in Applications. The Text Replacement feature might not be enabled by default in some applications. If you encounter an application that doesn’t support text replacement, there may be a way to turn it on. Go to the application’s [Edit](#) menu and look for a [Substitutions](#) menu item. If available, select it, and then choose [Text Replacement](#) from the pop-up menu list.

A Few Text Replacement Guidelines. Here are some guideline suggestions that you may find helpful:

- Don’t use dictionary words as substitution shortcuts. Otherwise, you’ll find yourself with text entries that you don’t expect or want.
- Keep your shortcuts short – just a few characters, say 4 to 5 of them. Otherwise, they become hard to remember.
- To avoid some confusion, consider creating shortcuts that use a modifier key before the shortcut. For example, you can start a shortcut with the [@](#) symbol (such as [@add](#) for your [street address](#)).

### **Correct Your Spelling**

Autocorrect. Recent versions of Mac OS X and now macOS, will offer suggestions and then automatically correct entries if you’ve misspelled a word. For example, if I type “spelling” (notice that the letter “l” was mistyped three times instead of just twice), then macOS offers a spelling correction in a “suggestion box” below the mistyped word. (See the illustration on the next page.) Also, in some applications, a [red squiggle](#) (sometimes a [blue squiggle](#)) will appear below the misspelled word.

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**Suggestion Box for Misspelled Word**

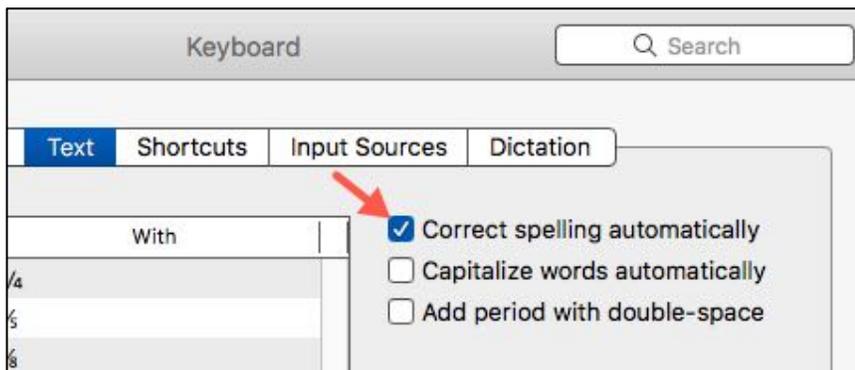


**Misspelling Red Squiggle**

If you continue and tap the spacebar when you see a suggestion, the correction will be inserted instead of the misspelling. This is a process commonly known as “[autocorrection](#).”

*Note:* The suggestion box that appears after a spelling error is the same as found in our discussion about text substitutions. After all, auto correction of spelling errors is simply another form of text substitution.

The process of correcting spelling automatically is controlled by a setting in the same [Keyboard](#) system preference ([Text](#) section) that we’ve been discussing. You turn the feature on or off by choosing the [Correct spelling automatically](#) checkbox:



**Keyboard System Preference (Text Tab) – “Correct spelling automatically” Checkbox**

Ignore Autocorrection. If you wish to use the word as you typed it—say, you consider it to be a valid variation of the spelling—then you can click in the “x” next to the entry in the suggestion box to dismiss the autocorrection:



**Suggestion Box for Misspelled Word**

Another, perhaps simpler, way is to simply press the Escape ([esc](#)) key to dismiss the autocorrection.

Custom Dictionary. What if autocorrection keeps trying to correct a word that you want to be entered the way you typed it? This can happen when you’re entering a technical term. There is a [Custom Dictionary](#) file for each user account on your Mac.

*Note:* Some apps allow you to add words to this dictionary. If the misspelled word shows that red or blue squiggle, you may be able to Right-Click (Control-

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Click) on it and find a pop-up menu item—perhaps labeled “Add” or “Learn” that will let you add that word to your Custom Dictionary.

You can edit the Custom Dictionary to add words that you want to stop being corrected to its list. This will prevent macOS from attempting to correct those items. Also that squiggle below that misspelled word will no longer appear.

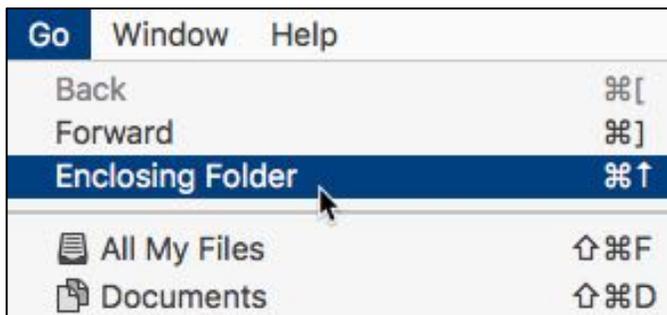
Editing the Custom Dictionary. This is relative simple, but it does involve accessing the hidden [Library](#) folder for your account on your Mac:

- Locating the Library folder for your account depends on the version of Mac OS X or macOS that you’re using, although all of them involve using the Finder. If you’re on a more recent version of Mac OS X, say 10.11 (El Capitan) or macOS (Sierra), go to the Finder’s [Go](#) menu and hold down the [Option](#) key so that the [Library](#) folder shows up in the dropdown menu. Then select it and open the Library folder.
- Another way is to find your [User Folder](#) because this is where your Library folder is located. Your User Folder is probably already in the [Sidebar](#) and has a “house” icon:



#### User Folder Icon

Open a Finder window, use an existing open window, or just click on the Desktop as a starting point. If your User folder isn’t visible (may not be at this point), go to the Finder’s [Go](#) menu and select the [Enclosing Folder](#) menu item (see below):



#### Finder “Go” Menu – Enclosing Folder Menu Item

Keep selecting [Enclosing Folder](#) until the Finder window displays your User Folder. Then locate and open the [Library](#) folder.

- Inside the Library folder is a long list of other folders. Scroll through them until you find the [Spelling](#) folder. Open the Spelling folder and locate the [LocalDictionary](#) file. This is the file that contains your [Custom Dictionary](#).  
*Caution:* Before you attempt to edit the LocalDictionary file, make a copy of it just in case you make some sort of mistake in editing.
- When you double-click the LocalDictionary file, it should open in your default text editor (such as TextEdit), and you’ll be able to see and edit its contents.

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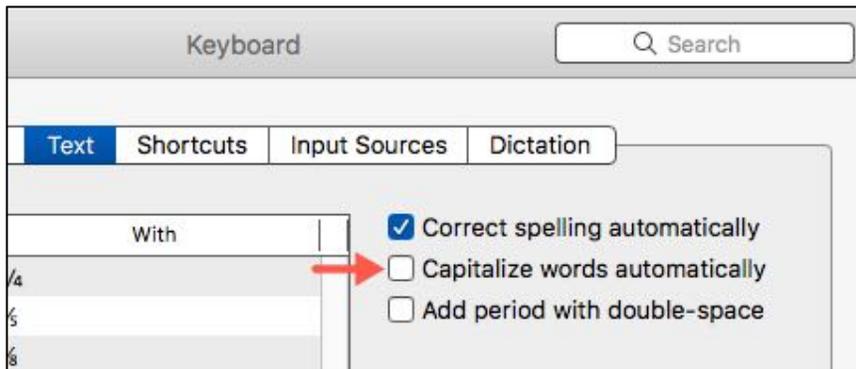
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- Now you can add multiple items to your dictionary. (However, make sure to keep them in alphabetical order!) You can also edit or delete entries if you don't want them to be considered as correctly spelled anymore. After your changes are complete, you must [Save](#) the file and then [Log Out](#) of your account (under the  menu) and [Log back in](#) again for your changes to take effect.

### Other Keyboard System Preference/Text Editing Options

The [Keyboard](#) system preference ([Text](#) tab) has several other options for document editing.

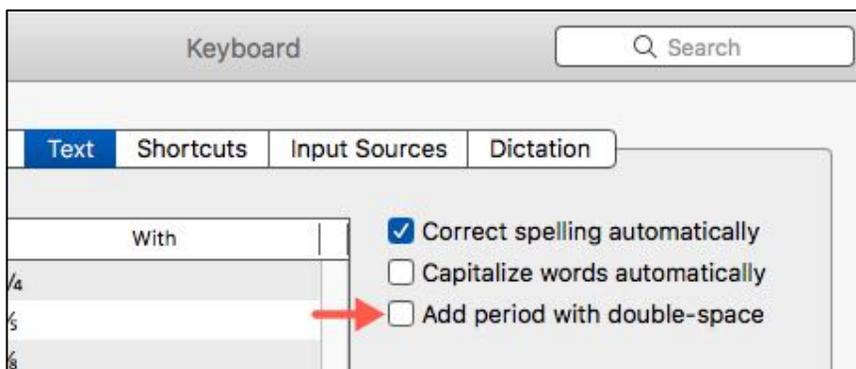
[Capitalize Words Automatically](#). Click this checkbox to use automatic capitalization feature:



### Keyboard System Preference (Text Tab) – “Capitalize words automatically” Checkbox

As the [Help Guidance](#) for Text preferences states: “Enable automatic capitalization correction in any app that supports it. This automatically capitalizes the first word of a sentence and proper nouns (such as, New York or Sonia) as you type.”

[Add Period After Double-Space](#). Click this checkbox to automatically add a period after you type a double space:

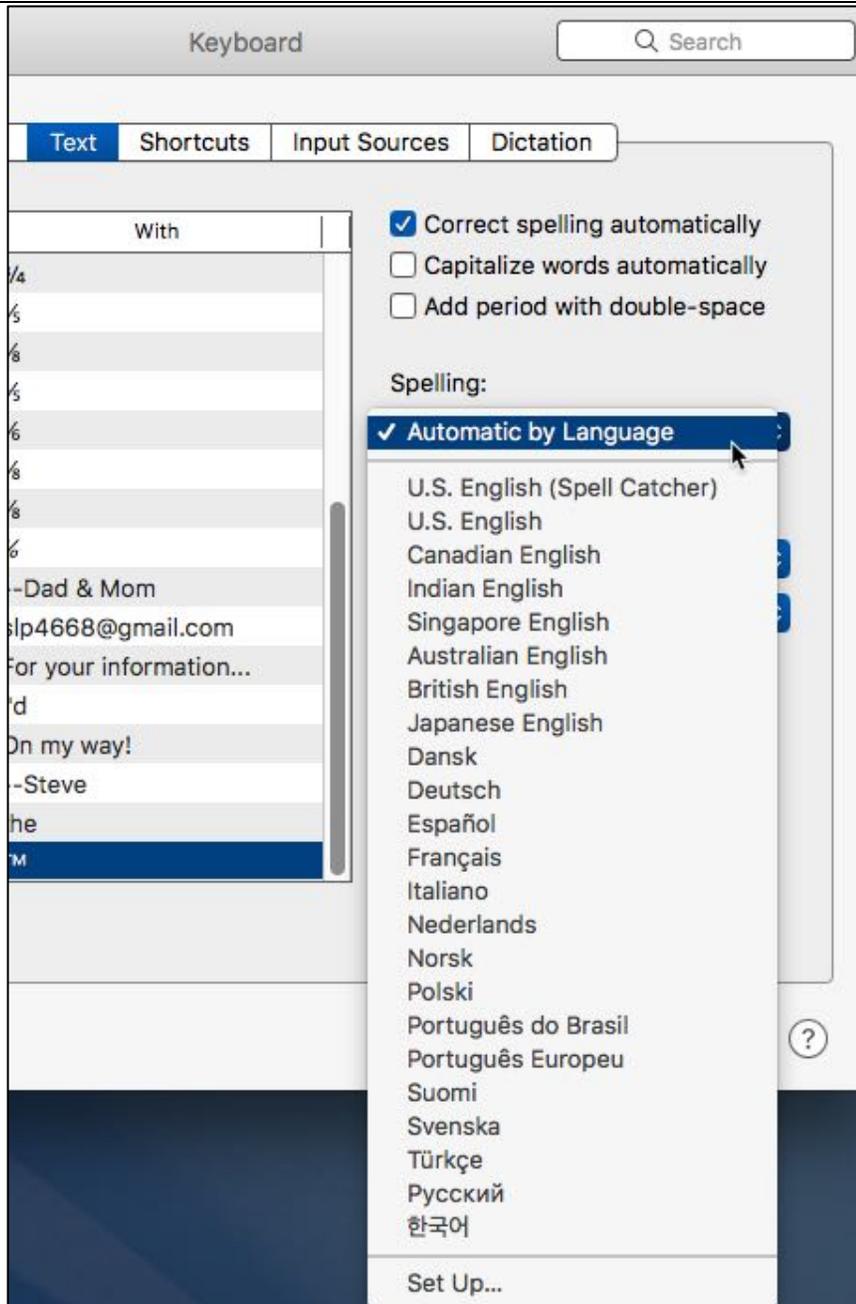


### Keyboard System Preference (Text Tab) – “Add period with double-space” Checkbox

Help Guidance: “Enable this option to quickly end a sentence with a period and a space by just pressing the space bar twice.”

[Spelling Language](#). You can control how spelling is checked by language, although the default setting is likely the best here. Click on the menu to display the numerous options. (See the illustration on the next page.)

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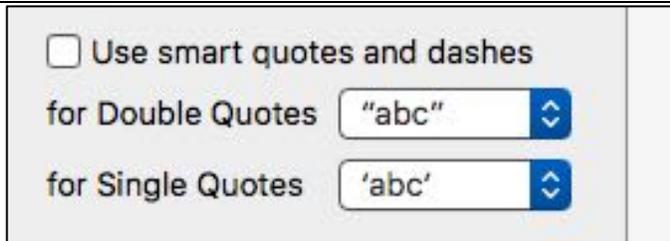
### Keyboard System Preference (Text Tab) – Spelling Language

Help Guidance: “By default, spelling is checked automatically by language (useful if you type in different languages). To select the languages that are checked automatically, choose Set Up from the pop-up menu. To have spelling checked for a specific language, choose the language from the pop-up menu.”

Smart Quotes and Dashes. The last section in the [Keyboard](#) system preference ([Text](#) tab) deals with how [Smart Quotes](#) and [Dashes](#) will be handled. (See the illustration on the next page.)

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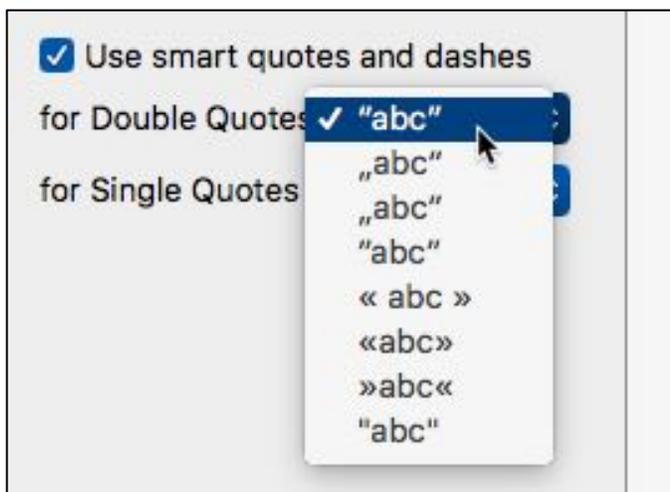


### Keyboard System Preference (Text Tab) – “Smart Quotes and Dashes”

[Smart Quotes](#) are sometimes called “[curly quotes](#)” to differentiate them from generic vertical quotation marks, also known as [Straight Quotes](#). Curly quotes are the quotation marks style used in what is considered “good” typography.

The straight single quote (') symbol and the straight double quote (") symbol are usually found on the keyboard key next to the Return key. Depending on the application being used, Straight Quotes may be what is typed by default. They are also used for the foot (') and inch (") symbols.

Click the “[Use smart quotes and dashes](#)” checkbox to turn on the use of smart quotes. Note, however, that this feature goes far beyond the use of just curly quotes. Each of the two dropdown menus offer many options (application dependent). Here’s the one for standard curly double quotes:

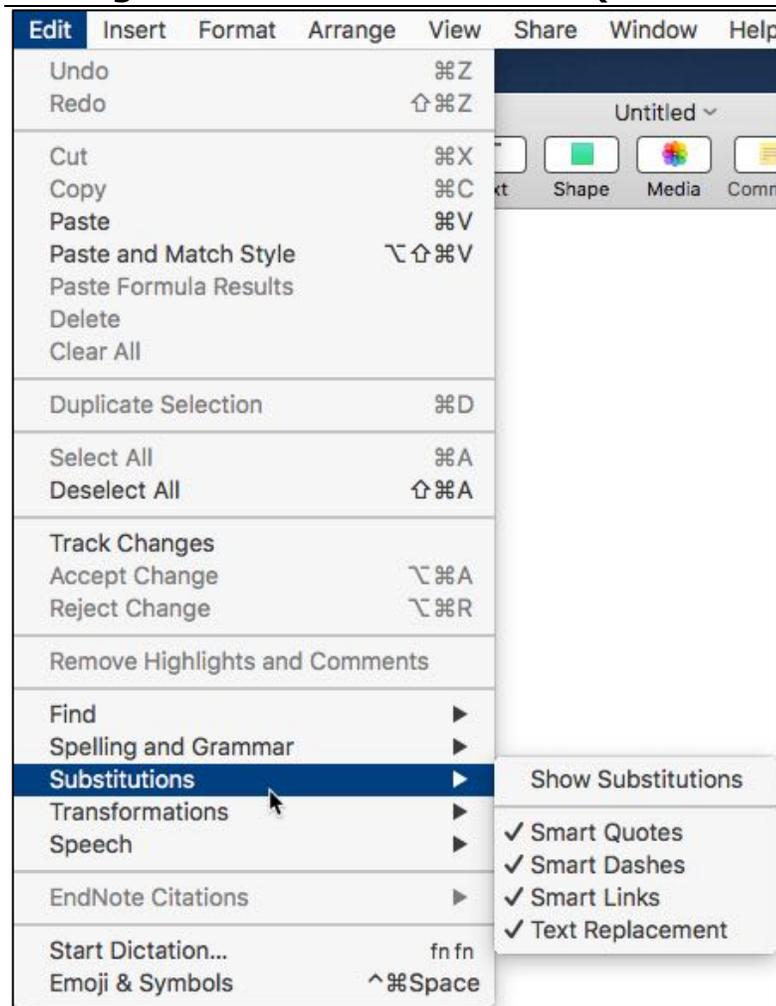


### Keyboard System Preference (Text Tab) “Smart Quotes and Dashes” Double Quote Dropdown Menu

## Text Substitutions

Several Mac programs (Pages, TextEdit, Mail, and Safari to name a few) include a built-in “[Substitutions](#)” option that allows you control, on an application-by-application basis, the use of [Smart Quotes](#), [Smart Dashes](#), [Smart Links](#), and [Text Replacement](#). For the applications that support it, select [Substitutions](#) from the [Edit](#) menu. (See the illustration on the next page which is an example from the Pages application.)

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### Edit Menu (Pages) – Substitutions Menu Item

Click on the [Substitutions](#) menu item to see which ones are active. Click on the [Show Substitutions](#) sub-menu to bring up the Substitutions window to configure them:



### Substitutions Configuration Window

*Hint:* You can also turn the four substitution options on and off by clicking on them in the Show Substitutions sub-menu window.

**Smart Dashes.** After you click the Smart Dashes checkbox, typing two consecutive hyphens (dashes, --) will cause them to be replaced with the typographical em-dash (—). This type of wide dash is often used to offset a phrase or statement in some text rather than, perhaps setting it off with commas or parentheses.

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*Example:* Consider the sentence “Double Click--a great Mac user group--is located in Milwaukee.” By using the Smart Dashes option in Pages, the sentence could be typed as “Double Click—a great Mac user group—is located in Milwaukee.”

**Smart Links.** By enabling this option, you can turn any text that resembles a URL or an email address into a link automatically. For example, typing “double-click.org” will turn the text into a clickable link ([double-click.org](http://double-click.org)). When clicked, Smart Links will open your default web browser or email program and take you to the selected location.

**Text Replacement.** Clicking this checkbox will allow you to make text replacements automatically as you type. This feature is based on your settings in the **Text** tab of the **Keyboard** system preference pane. Click the **Text Preferences** button located below the Text Replacement checkbox to go to the Text tab in the Keyboard system preference pane.

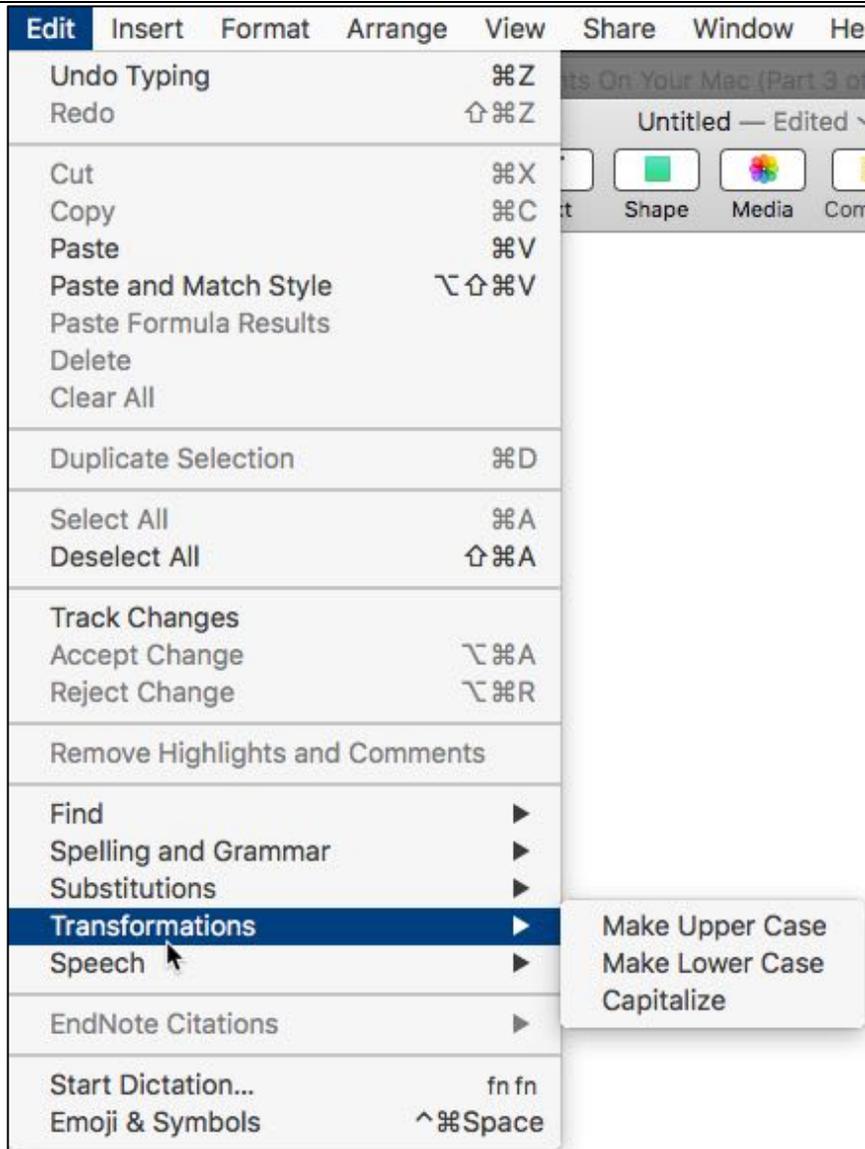
**Smart Quotes.** Enable this to replace a straight double quote (") with either (”) or (“), depending on whether the quote characters appear before or after a word. Similarly, this feature also replaces a straight single quote (') with either a curly quote (’) or (‘). The two pop-up menus are used to specify quotation mark substitutions for other languages.

If this Smart Quotes feature looks familiar, it’s similar to the Smart Quotes and Dashes option found in the Keyboard system preferences (Text tab) discussed above, starting on page 11. However, in applications like Pages, Smart Quotes operates independently of the “**Use smart quotes and dashes**” settings in Keyboard system preferences.

### **Text Transformations**

As with Text Substitutions, several Mac programs (Pages, TextEdit, Mail, and Safari, etc.) include a built-in “**Transformations**” option. This option that allows you control, on an application-by-application basis, the ability to change the **Case** (**Upper Case** and **Lower Case**) and **Capitalization** of selected text. For the applications that support it, select **Transformations** from the **Edit** menu. (See the illustration on the next page, another example from the Pages application.)

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### Edit Menu (Pages) – Transformations Menu Item

Using Transformations is straightforward: Select some text and then choose the transformation to apply.

Make Upper Case – Makes every character in the selected text upper case.  
Example: Double Click is great! → DOUBLE CLICK IS GREAT!

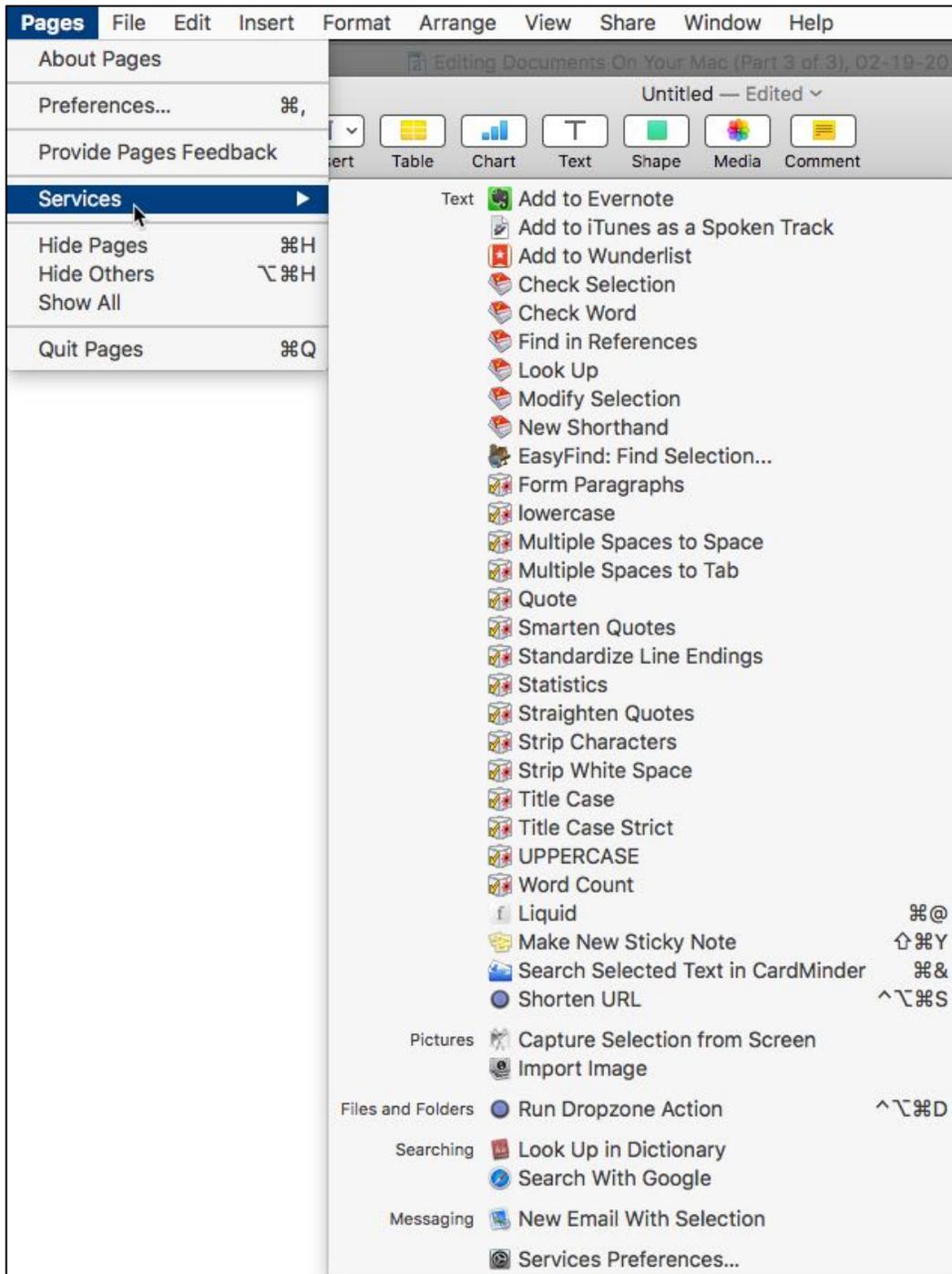
Make Lower Case: Makes every character in the selected text lower case.  
Example: ALL CAPS → all caps

Capitalize: Capitalizes the first letter of each word in the selection.  
Example: one two three four → One Two Three Four

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### Services

The last document editing technique is using [Services](#). As with other techniques, this is also application dependent. Look for Services under the application's first menu (has the title of the application, such as [Pages](#) for the Pages application). Here's what it looks like in my copy of Pages:



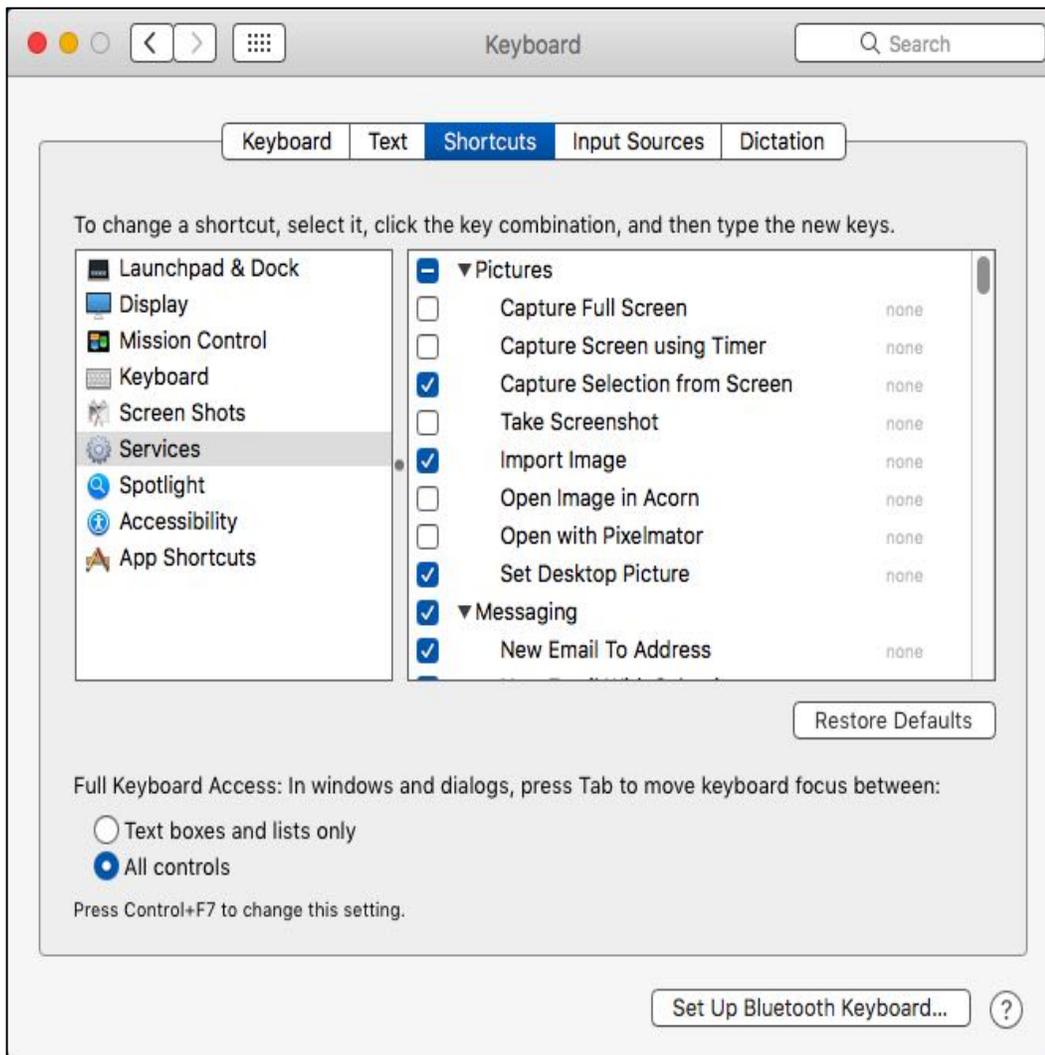
#### Pages Menu – Services Menu Item

As you can see, the number of items that show up in the resulting pop-up sub-menu can be considerable. Note: many third party applications add items to the

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Services menu, making it larger. In my copy of Pages, this includes additions such as: "Add to Evernote," "Add to Wunderlist," and many others.

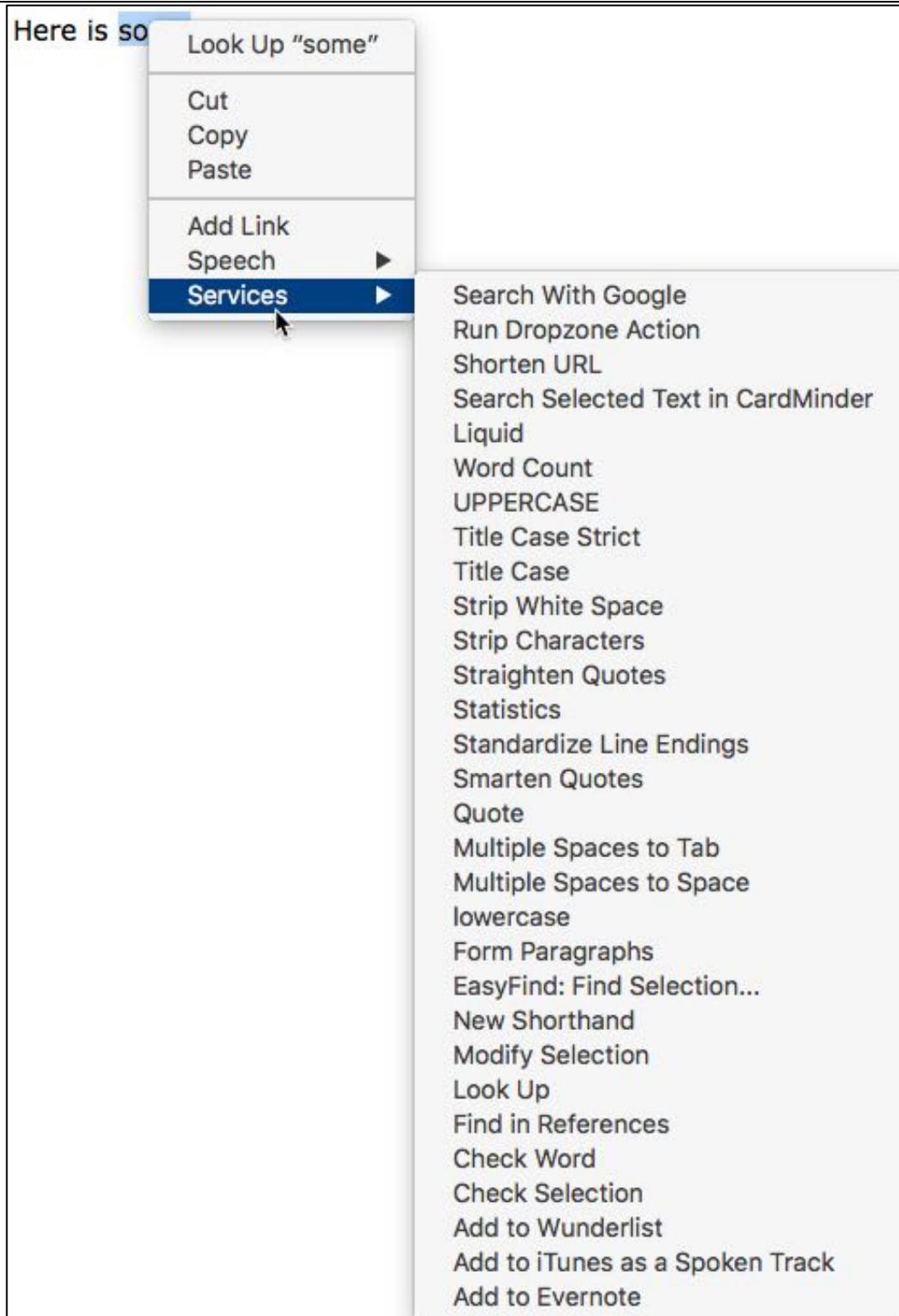
Selecting the last item in the Services sub-menu will take you to the [Shortcuts](#) tab in the [Keyboard](#) system preference and will select the [Services](#) item in the left pane. (See the illustration below.) Here you can select or deselect items to appear on applications' Services menu item.



### Keyboard System Preference (Shortcuts Tab) – Services Item

Finally, you can click on or select some text and then Right-Click (Control-Click) on the selection to display text editing options in the resulting pop-up menu. (See the illustration on the next page.) Then simply choose one of the editing options from the list.

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**Pages – Services Pop-Up Menu (After Right-Clicking or Control-Clicking on a Text Selection)**

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### Limitations of macOS Text Replacement Techniques

While the capabilities of the macOS text replacement techniques are extensive, there are some limitations when it comes to text expansion, especially when it comes to [Conditional Formatting](#).

Conditional Formatting builds a text replacement based on something that changes, a variable. A good example involves inserting a date because the month, day and year are all variables since they change with time.

For more text replacement features and control, you'll need to look into a third party utility. I happen to use [TextExpander](#) at the moment. I built a text expansion to insert the current month, day and year using the numerical format [mm-dd-yyyy](#) and assigned it the [ddd](#) shortcut. So, as of today (February 19, 2017), whenever I type the [ddd](#) shortcut, the text replacement result is: [02-19-2017](#).

There are several third party utilities that provide enhanced text replacement features. Here are four of them:

TextExpander ..... Website <https://textexpander.com>

Cost: Version 5 - \$45; Version 6 Subscription - \$3.33/month billed annually (\$40)

aText ..... Website <https://www.trankynam.com/atext/>

Cost: \$4.99

TypeIt4Me for Mac

Website <https://itunes.apple.com/us/app/typeit4me/id412141729?mt=12>

Cost: \$19.99

Typinator ..... Website <http://www.ergonis.com/products/typinator/>

Cost: 24.99 € (~ \$26.54)

### Next Presentation

Next month, we'll present another Mac Basics topic. If you have any suggestions for presentation topics, please contact me at [slp4668@gmail.com](mailto:slp4668@gmail.com).

*-Steve Parker*