

Scrivener 3 Next-Level (Mac)

Creating a Project

- File>New Project
- Choose location before saving, Scrivener auto-saves every 2 secs of inactivity

Projects

- A Scrivener project is a collection of files
- Usually create one project for each book, but don't have to (blogs, lectures, essays, etc)

Terminology

- Binder: List of files in project, and a navigation tool
- Editor: Where you write and revise (format is mainly for personal preferences)
- Inspector: Shows metadata about file you're viewing, including synopsis and notes

Editor Options

- Split screen (To toggle horizontal/vertical split, hold Option key)
- Paste & Match Style (Edit>Paste and Match Style)
- Composition mode background image (Project>Project Settings>Background Images)
- Composition mode color changes, go to Scrivener>Preferences>Appearance>Composition Mode>Colors
- Split a document into two: click at location to divide docs and go to Documents>Split>at Selection (or select text and choose Documents>Split>with Selection as Title)
- Merge two documents: Select both files in the Binder and go to Documents>Merge

Creating Custom Formatting

- To change the default format (for all projects on a computer), go to Scrivener>Preferences>Editing>Formatting and make adjustments to the mini Editor
- Converting to default text style (click anywhere in document first: Documents>Convert>Text to Default Formatting)

Adding Annotations/Comments

- Insert>Inline Annotation
- Insert>Comment

Bookmarks

- You can add internal or external file or web page bookmarks by choosing the Bookmarks button in the Inspector (looks like a ribbon).
- Choose between Project and Document bookmarks by clicking the header.
- You can drag and drop the URL of a website from Chrome/Safari to the Bookmarks pane. Also works for documents. Alternatively, you can click the Options button to add.
- To manually add a website, click the Options button and choose Add External Bookmark.

Working with the Label and Status Fields

- Customizable: Can rename field, add/edit values, colors, default value

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- Can only apply one Label value and one Status value to a document
- Apply in inspector, or by right-clicking (Control+click) in the Binder. For multiple items, can only apply by right-clicking.
- View colors: View>Use Label Color In>Icons (and/or other options)

Creating Custom Icons

- Documents>Change Icon
- To use an emoji, go to Documents>Change Icon>Icon from Text...

Setting Word Count Targets

- Project>Show Project Targets
- Choose Options to set deadline, calculate from deadline, and turn off compile group settings

Viewing the Corkboard and Creating a Storyboard

- Must select a folder or group of files
- View>Corkboard (or button on toolbar)
- Enter synopsis on card (same as Synopsis in Inspector)
- Use + button to add new card/document
- Drag cards to change order
- Double-click icon to open corresponding document in the Editor

Working in the Outliner

- Similar to a spreadsheet for viewing metadata in columns
- Must select a folder or group of files
- View>Outline (or button on toolbar)
- View>Outliner Options to add or remove columns (or [>] button in header)
- Can change values from Outliner, drag rows to change order, and sort by clicking on headers

Adding Keywords and Custom Metadata

- Allow multiple values per document
- Allow more flexible values and options like open text
- Project>Show Project Keywords to view Keywords panel and add/modify keywords
- Can also add/remove keywords via drag and drop to Binder, or on Metadata tab (Keywords section) in the Inspector
- Click the “Set Up Custom Metadata” button on the Metadata tab in the Inspector to create a new field.

Using Styles

- To apply a style, select the desired text and choose a Style from the dropdown in the format bar, or from Format>Style.

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- To create a style, format a section of text as desired, select it, and go to Format>Style>New Style from Selection. Choose to include character or paragraph formatting, or both.
- To revise a style, format a section of text as desired, select it, and go to Format>Style>Redefine Style from Selection>[name of style to change]. All sections with that style applied will be updated.
- To delete a style, go to Format>Style>Delete Style.

Saving Snapshots of Your Work (i.e., version control)

- A snapshot is an un-editable, frozen-in-time copy of a single document (e.g., scene or chapter).
- You can take/store more than one snapshot of a document, and they are date/time stamped. Use Documents>Snapshots>Take Snapshot.
- Snapshots are stored with their original document (indicated by “dog-eared” icon, and a * next to the camera icon in the Inspector), and viewable from the Snapshots tab in the Inspector.
- To search your snapshots, go to Documents>Snapshots>Show Snapshots Manager.

Customizing the Toolbar

- Add or remove buttons on the toolbar via View>Customize Toolbar.
- Drag desired buttons onto the toolbar, or drag buttons off the toolbar to remove.
- In the Show dropdown menu, choose Icon and Text to see both buttons and description.

Advanced Searching Techniques

- Click the small magnifying glass in the Project Search text box to change the search parameters or save the results as a collection.
- To show/hide Collections, click the View button or View menu and choose to Show Collections or Hide Collections.
- Use the Quick Search bar in the toolbar to view results in context (limited results).
- Use Edit>Find to search a document or selection of documents.
- See “Find by Formatting” below for more options.

Find by Formatting

- Includes annotations, comments, highlighted text, formatted text (e.g. italics), etc.
- Must have cursor in a document to access this option
- Edit>Find>Find By Formatting (search entire project or selected docs)

Templates

- Each one has slight differences/uses. Any named “with Parts” will have an extra folder in the Binder with a chapter folder and text document inside.
- My preference is to start with Blank and only add what I need.

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- Can create your own (File>Save As Template), but I recommend using File>Save As to create a “throwaway project” that you can strip, then create template from that and delete the throwaway project (from Finder) when done.

Creating a Series Bible

- A series bible is a separate project that you populate with items relevant to an entire series.
- Fill it with things like character sheets (brief by book, and detailed for main characters), a timeline, vehicles, settings, general research, overused words, and final versions of books in the series for easy searching

Compiling Overview

- Compiling is combining documents and folders into your Binder into a single output file with the desired appearance.
- Access compile via File>Compile.
- Start by choosing an output file type from the Compile For dropdown list at the top.
- Select a format from the Formats column (left). Formats are global settings that will be applied to the output file, like margins, paper size, and headers/footers.
- The Contents pane on the right is where you select which items to include in the output, and assign/change section types (see below).
- Click the Assign Section Layouts (center) to assign the desired section layout (visual format for that type of document or folder) to each section type.

Working with Section Types and Section Layouts

A section type is a value (or description) you assign to all files within your project that require the same format (e.g. front matter, scenes, chapters). A section layout is the visual representation of what that section will look like.

Compiling for a DOCX

1. Go to File>Compile.
2. From the Compile For dropdown menu at the top, choose Microsoft Word (DOCX).
3. Under the Formats column on the left, choose Manuscript (Times).
4. In the Section Layout column in the center, click the Assign Section Layouts button.
5. Under the Section Types column on the left, select the section type you want to assign.
6. On the right, click the desired section layout.
7. Repeat until all section types are assigned.
8. Click OK.
9. In the Contents pane on the right, select the documents you want to include in the compiled output. Make sure the section types are assigned to each file as desired.
10. Click the MetaData button at the top (luggage tag icon) and fill in the details about the book. If you want your entire name to show in the header, enter your full name in the Surname text box. Be sure to put the desired book title in the Abbreviated Title column for it to show in the header.

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11. Click the gear button at the top to make any global changes like removing trailing whitespace from documents (e.g. extra paragraph returns or spaces), ensure comments and annotations are not included, etc.
12. Click Compile and choose a location and name for the file. If you want it to open automatically in Word, be sure the box to “Open compiled document in” is selected and choose Microsoft Word.

Compiling for E-books (Kindle MOBI and EPUB)

- Kindle note: You must have Kindle Previewer (available from Amazon KDP) installed on your computer to create a MOBI. However, Amazon’s KDP now prefers an EPUB or DOCX when uploading books for sale, so you can skip creating MOBIs altogether.
- Change Compile For to ePub Ebook (.epub) or Kindle Ebook (.mobi).
- Choose the Ebook format in the column on the left.
- Adjust the contents as needed to ensure all desired files are included.
- Click Assign Section Layouts to assign the desired layouts to each section type.
- Click the Metadata tab to verify or update metadata (searchable data like title, author name, use unique ID field if you have an ISBN).
- Select the Cover tab to add a cover image. NOTE: The image file must be stored in the project before you can select it here.

Saving Your Settings Without Compiling

If you make a bunch of changes to the Compile settings but aren’t ready to compile, you can hold the Option key on your keyboard and click Save.

Getting Help

- Help>User Manual
- Help>Support
- Help>User Forums
- <http://gwenhernandez.com/scrivener-corner/scrivener-tips/>
- <https://ScrivenerClasses.com>