

# User Manual for macOS



Revision 3.4.0

# SCRIVENER 3 USER MANUAL for macOS



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## COLOPHON

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Part I

# Introduction

The maker of a sentence launches out into the infinite and builds a road into Chaos and old Night, and is followed by those who hear him with something of wild, creative delight.

Ralph Waldo Emerson

**|Philosophy**

**1**

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The word processor, that staple of writers' tools, is the digital age's equivalent of the typewriter. And as with the typewriter before it, the word processor is a great tool for typing up a letter, for writing from a plan created somewhere else, or for hammering out words to see where they lead you.

Ultimately, however, a word processor assumes a predominantly linear approach: you write the beginning first, the end last. You enter text, cut and paste, perhaps even work with a basic outline, but the true focus is on presentation, on producing a professional-looking document. The word processor offers little in the way of the foundations on which writing is done—the planning, the research, teasing out an effective structure.

In this sense, Scrivener is the opposite of a word processor, because Scrivener's focus is on how you put together a long document rather than on how it is presented. It is the digital equivalent of a writer's studio, incorporating not only the typewriter, but also the notebook, the index cards and corkboard, the jotted plan, the scrapbook and the folder of research.

Scrivener was built to bring together the various tools of the working writer in ways that only software can. Because this is where software comes into its own—taking tasks that are disparate in the real world and integrating them. To take just one example, in the analogue world, if you move index cards around on a corkboard, you also have to reshuffle the sections those cards represent in your manuscript. In Scrivener, the corkboard and manuscript are integrated, so that moving a card on the corkboard moves the associated section in the manuscript and vice versa.

Every writer sneaks up on the blank page differently; accordingly, Scrivener is designed to be flexible, to adapt to the writers's workflow, not the other way around. It works equally well for writing a novel, a doctoral dissertation, a short story, a screenplay—or anything else. It doesn't prescribe any particular structure or approach. Fiction writers often debate the merits of plunging in and writing versus planning everything before typing a single word, but Scrivener is agnostic and allows either approach—or a mix of both.

The core concepts of Scrivener are these:

- Its editor should be familiar to anyone who has used a word processor.
- You can break the manuscript down into sections as large or small as you like, and work on it in any order.
- You can view sections as discrete chunks or in context with other sections. In a novel, for instance, you could view a scene on its own, in the context of its chapter, or in the context of the whole novel.
- Each section is associated with an optional synopsis, to indicate what the section is or will be about.
- You can step back and see all the synopses in an outline or on a corkboard to get an overview of the whole manuscript, or of a single chapter.

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- A writing project is essentially a digital ring-binder in which you can store and view images, web pages, recorded interviews and other research alongside your writing.
  - You can view more than one document at the same time: refer to notes alongside a chapter, or bring up an image alongside the description you are writing.
  - What looks great in print is not always best for the screen, so you can choose a different format for your exported or printed work without affecting the original text, and you can tailor the formatting for a particular output. An ebook can be formatted one way, a printed manuscript another.

The underlying philosophy of Scrivener was in part inspired by a passage written by the author Hilary Mantel in a collection of essays by writers on the process of writing entitled *The Agony and the Ego*. Hilary Mantel described a process of “growing a book, rather than writing one,” which can be summarised thus:

1. During the first stage of writing, you might jot ideas down on index cards—phrases, character names, scene ideas; any insight or glimpse.
2. When you have gathered a few index cards, you might pin them to a cork-board. Other ideas build around them, and you might even write out a few paragraphs and pin them behind the index card with which they are associated. At this stage, the index cards have no definite order.
3. Eventually, you may begin to see an order emerging and re-pin the index cards accordingly.
4. After you have gathered enough material, you might take all of your index cards, sheets of paper and jottings and place them into a ring-binder. You are still free to move everything around, but now you have a good idea of how much work you have done and how much more work you have to do.

Scrivener, then, provides an environment in which you can “grow” your work organically—an environment which in turn grows with your writing, to accommodate the multifarious stages of composition.

# About This Manual



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Scrivener has a wide variety of features to accommodate many different purposes, including novels, screenplays, academic papers and dissertations, general non-fiction, journalism, blogging, and much more. While it strives to present as simple an interface as possible, once you start digging into the application, you will find a degree of flexibility and complexity to suit even the most esoteric needs. To help organise all of these concepts and features, the manual itself has been split into four primary sections including an appendix. In each section the features most useful to you during those phases of your real-world project will be explained in depth:

1. **Introduction (Part I)**: the first section goes over basic installation and updating notes, and then introduces several fundamental concepts regarding Scrivener's interface, how it stores your work into "projects", and how your work is organised within those projects. This will be essential reading for anyone new to the software, and an index into the various elements you'll see on screen as you learn.
2. **Preparation (Part II)**: next, we'll take a deeper look at all of the core organisation and management features of Scrivener. It could easily be said that Scrivener is as much about organising your writings (and the material you use to help write them) as it is about getting the actual typing done. You may not need all of the topics we'll go into in this section, but if you have a question on how the program is meant to work at the higher, more organisation levels of usage, chances are you'll find it here.
3. **Writing (Part III)**: beyond the obvious aspects of working in the text editor, we'll also go into the many other activities that must be done while writing, such as working with images and inserting them into your manuscript, annotating your work with comments and footnotes, formatting, handling revisions and so forth.
4. **Final Phases (Part IV)**: getting your work out of the software and into the hands of your agent, publisher, readers or wherever it needs to go next, will be the final practical focus of the manual. We'll also discuss options for exporting files and printing copies.
5. **Appendices (Part V)**: last but not least, we'll go over every single menu command, preference and miscellaneous reference you may need. These sections can also serve as a large topical index, as you can easily look up more advanced or in-depth topics by starting with what you've found while exploring the interface.

Although it will endeavour to explain features in depth, the Scrivener User Manual is intended as an exhaustive reference, rather than a training tool. The best way to kickstart your use of the software is to take the Interactive Tutorial, located in the Help menu.

**Upgrading from Scrivener 2**

If you've been using Scrivener for a while, you'll also want to check out our What's New ([Appendix F](#)) appendix, as a few things will have moved around or require your attention when you first upgrade your work to the new version. You can also keep tabs on new developments in Updates to Version 3 ([section F.11](#)).

This manual has been written using Scrivener (yes, we eat our own dog food!) and is available in a few different formats from [our web site](#). The writing style makes use of MultiMarkdown formatting syntax and so demonstrates that system as well.

**Annotating this PDF**

If you wish to make notes and annotate the PDF using software such as Adobe Reader, it is recommended you download a separate copy from the above linked page, or open the PDF from the Help menu and drag the icon from the window's title bar into your binder, or to Finder with the Option key held down to create a copy. When Scrivener updates, it will very likely overwrite the existing PDF in the installation (often with revisions to the text), which will destroy any of your notes.

## 2.1 Terms & Conventions

Some features apply only to the standard version of the software, and others only apply to the Mac App Store version. Various key features will be marked to indicate this. If you have purchased the program directly from our web site, then you have the standard version. If you used Apple's App Store tool to buy Scrivener, then you have the Mac App Store version. Sections applicable to only one or the other will be indicated with the following markers:

- Standard retail version of Scrivener: **<Direct-sale only>**
- Mac App Store version of Scrivener: **<MAS only>**

Similar markings will be used to indicate when specific versions of macOS are required for a particular feature to be available.

### 2.1.1 Interface & Menus

Whenever the documentation refers to an interface element that can be interacted with, such as a button, the visible name for that element will be formatted in dark red, such as “Click on the **OK** button to save changes”. Button labels, keyboard shortcuts and menu items will all be displayed in this fashion.



Menus will be displayed in a hierarchy using the “▶” character to separate top-level, submenus, and commands. E.g. to convert a range of selected text to uppercase, invoke the **Edit ▶ Transformations ▶ Make Uppercase** command. Some menu commands change their name depending on usage. The parts that change will be indicated like so: **View ▶ Text Editing ▶ Show|Hide Invisibles**.

### Difficulty Seeing the Labels?

We have prepared [an alternate version of this project](#) that may increase the visibility of hyperlinks and interface labels in this project, for those with red/green colour blindness.

Some of the names for various elements within Scrivener are customisable on a per project basis, and how you name these will impact much of the interface. A good example is the “Label” setting, which can be used to colour-code your work. How it is referred to can be changed in settings (to something like “Point of View” or “Rewrite Status”), and will impact the names of menu items and other bits of interface that refer to it. In all cases, this documentation will refer to these malleable elements by their default names.

The names of features will be capitalised as proper nouns if it is necessary to differentiate them from standard nouns. A *Collection* is a group for organising loose documents, while the word “collection” may be used to indicate a casual grouping of items and not necessarily a formal Collection.

## 2.1.2 Keyboard shortcuts

Keyboard shortcuts will use the following symbols:



- ⌘: The Command key, or the Apple key, is the one located directly to the left and right of your spacebar.
- ⌥: The Option key is also labelled the Alt key on some keyboards, depending on which country you purchased your Mac from. Some laptops only have one Option key on the left side.
- ^: Control is usually located to the left and right of the Option keys on their respective side. Some laptops only have one Control key between the Option key and the Fn key on the left side.
- ⇧: The Shift keys are rarely used by themselves in shortcuts but are often used in combination with other modifier keys.
- The arrow keys on your keyboard will often be shortened to the four symbols: ↑ ↓ ← and →.

When a keyboard shortcut requires a combination of modifier keys, they will be printed together. Example: ⇧⌥⌘V (which matches **Edit ▶ Paste and Match Style**)

means you should hold down all of these modifier keys together and then tap the **V** key on your keyboard.

The Mac distinguishes between the **Return** key and the **Enter** key in some contexts. Specifically to Scrivener, we will point out the few places where using one key over another will make a difference. If you are using a compact or laptop keyboard, you may need to use the **Fn-Return** key combination to press the **Enter** key.

### 2.1.3 The Gear Button

With the release of macOS 11, Apple has changed how the gear menu button looks. This documentation will refer to that button using the  symbol, but be aware that on older version of macOS, this button will appear as a gear .

### 2.1.4 Settings Labels

Scrivener has many Settings (found in **Scrivener ▶ Settings...**).<sup>1</sup> They are organised into a hierarchy starting with a major category along the top of the window (like “Behaviors”), and sometimes into secondary tabs, either along the top or if there are several sub-categories, along the left, in a list. To refer to a specific category, we would say, “Behaviors: Navigation”. If a subcategory has further sections within it, then we’ll say something like, “Appearance: Binder: Fonts”.

The labels used in the interface to denote settings will be marked in dark brown boldface, where the **Binder Font** is a font setting located within the aforementioned settings pane.

### 2.1.5 Filenames & Paths

In cases where file paths are printed, the UNIX convention of providing a shorthand to describe your personal home folder will be used. An example might look like:

`~/Documents`

The tilde is a shorthand which means: `/Users/yourusername`. In this case, the path refers to the Documents folder in your home folder.

## 2.2 Finding Things in this Manual

This PDF has been birthed within the age of digital documentation, and a proper index has never been compiled for it. Despite this, in practice you should have

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<sup>1</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.

little difficulty in locating the topic you are interested in. Modern PDF reader software features excellent searching capabilities; most things can be discovered merely by searching for the proper names of things as labelled in menus, buttons or dialogue boxes.

Additionally, the appendices have been written to be used as a sort of topical index. If you have a question about a particular menu command or setting you can find them in Menus & Keyboard Shortcuts ([Appendix A](#)) and Settings ([Appendix B](#)). Throughout the manual itself, cross-references to more thorough descriptions of the feature will be provided. Interface in Overview ([chapter 4](#)) offers a visual guide of the main project window along with numerous cross-references to additional documentation, and serves as a way of learning the names of things in the software.

Lastly, if you are using a PDF reader with a contents sidebar feature you will find a very detailed table of contents has been provided. You can thus narrow down what you are looking for from vague topics in this fashion.

## 2.3 Spot a Problem?

A user manual is a living document. It evolves constantly as the software itself evolves, and as a result it can oftentimes be difficult to keep edited to the same calibre we'd expect of a finished and published book. If you spot a problem, or have a suggestion that would make this a better resource for you, we'd love to hear about it. Drop us a line at [contact@literatureandlatte.com](mailto:contact@literatureandlatte.com).

# **Installation & Upgrading**



## 3.1 Installation

**<Direct-sale only>** If you purchased Scrivener through the Mac App Store (MAS), then this section will not be relevant to you, as it pertains to the registration, installation, and maintenance of the standard retail version. When purchasing software through the MAS, all such tasks are done through the store software itself. If you require assistance installing or updating Scrivener through the Store, consult Apple’s documentation on the matter.

Whether you have purchased Scrivener or are looking to give it a try-out, the download and installation process will be an identical, as we use the “shareware” model of providing a try-before-you-buy version that can be unlocked with a key at any time. Thus it will be the key that is important to keep safe, more so than the downloadable software. To begin:

1. If you have not already downloaded the trial version from the [Literature & Latte web site](#), do so now.
2. When the installation DMG finishes downloading, locate it in your web browser’s download folder and double-click to open the installer.
3. Drag the Scrivener icon to Applications folder, as indicated by the arrow.<sup>1</sup>
4. Eject the installation DMG by using the **File ▶ Eject** command in Finder on the installation window.
5. Open the Applications folder in Finder and double-click the Scrivener icon to launch the software. **If you drag the icon to your Dock, always do so from the Applications folder, not the installation DMG.**

### Software complains about not being installed correctly?

If you attempt to run Scrivener from a place that resembles the installation DMG, you may get a message offering the chance to have it installed for you.<sup>a</sup> If you intend to run Scrivener from outside of an Applications folder, then you should check the box that will inhibit this warning from appearing again in the future.

<sup>a</sup>In technical terms, that means a removable volume or a disk that is read-only. If either of those conditions exist the warning message will be triggered.

<sup>1</sup> If you lack permissions to install software into the main system Applications folder, you can create an “Applications” folder in your home folder and drag Scrivener (and other software) there, instead.

### 3.1.1 The Trial Version

You can try out all of the features of Scrivener for 30 non-consecutive days without having to pay or register. During that period, Scrivener will be **fully functional**. After 30 days of use (and one grace session so you can export your work), you will no longer be able to access Scrivener at all unless you register. If you are getting close to the end of your trial and have decided to not purchase Scrivener, please skip forward to the sections on Compiling the Draft ([chapter 23](#)) and Exporting ([chapter 25](#)), for details on getting your work out of the program.

During the trial period, whenever you launch Scrivener, you will be reminded of how many trial days you have left. From the same window you can choose to buy a licence right in the software.

### 3.1.2 Purchasing Scrivener

Should you choose to purchase the software, registration will be a seamless process of unlocking the copy you've already downloaded. All of your settings and work will be right where you left them. Use the **Help ▶ Purchase Scrivener...** menu command, and click the “buy” button to launch the built-in store.<sup>2</sup>

When you buy a licence within the software, it will be activated automatically for you at the conclusion of a successful purchase. You will also be emailed your unique serial number, in case automatic activation fails. Make sure that you keep this serial number, along with the email address you used, in a safe place, as you will need both to register Scrivener again in the future.

If you have lost your serial number, clicking the **Retrieve Lost Serial...** button in the registration window will take you to our self-service support site, where you can request to have the information sent to your email address again. If for some reason you cannot get that to work, or no longer have access to the email used to purchase the software, please contact us [on our support page](#).

### 3.1.3 Upgrading and Discounts

If you have been using the older version of Scrivener for some time, and are a registered user, then you will either be eligible for a discount, or if you purchased recently enough, a free upgrade. In order to determine your eligibility, use the **Help ▶ Purchase Scrivener...** menu command, and click the “Upgrade from an older version” link, found below the large “buy” button.

You will be asked to input your legacy serial number. Our system will check the validity of this number, and whether it is eligible for a free upgrade. Depending upon the outcome, a coupon will be applied to your purchase of Scrivener. If you

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<sup>2</sup> A secure connection will be established between your computer and our vendor, Paddle. Scrivener itself will not gather your purchasing information or personal details, unless you opt-in to signing up for our newsletter when asked. If you would prefer to use the security of your browser to make the transaction, [visit our web store](#).

are eligible for a free copy, you will still need to finish the check-out procedure, but will skip the final payment phase.

### 3.1.4 Registering Scrivener

If automatic activation failed, you purchased Scrivener through the web store, received your licence as a gift or are simply reinstalling the software—you can register Scrivener at any time by clicking on the **Enter License...** button in the demo window that appears whenever you launch Scrivener, or by using the **Scrivener ▶ Enter Licence...** menu command.

1. In the first field, supply your current email address, or the address used to purchase the software originally.
2. Copy and paste the unique serial number in the “Serial Number” box, making sure that the hyphens are included as indicated, and that there are no unwanted spaces at the beginning or end of the pasted text.
3. Click the **Register** button.

If you receive a message stating that the information is invalid:

- Check and make sure they are in the right order. Your email should be in the top field; the serial number in the second field.
- Ensure the serial number you have looks correct. It should be a long sequence of capital letters and numerals, separated into five groups by hyphens.

After clicking the registration button, Scrivener will attempt to authenticate your copy over the Internet. An active Internet connection is necessary to activate the software. If you cannot immediately activate, you can proceed using the software, but will have to go through this procedure until such a time as you can bring the system online.

Once Scrivener has been registered, you can begin using it immediately. There will no longer be a time limit on its use and you will no longer see the nag box at startup.

### 3.1.5 Application Updates

The second time Scrivener is launched you will be presented with a panel asking whether or not Scrivener should automatically check for updates over the Inter-

net. Use of this feature may cause a delay in startup, whenever it is scheduled to check for an update.<sup>3</sup>

- Click the **Check Automatically** button to have Scrivener perform a daily check for updates.
- Click the **Don't Check** button to opt out. You can always manually have the software check for an update by using the **Scrivener ▶ Check for Updates...** menu command.

You can change the automatic update settings in **Scrivener ▶ Settings...**, under the General: Startup tab, **Automatically check for updates**. Once enabled, adjust how frequently the software checks in with our server to see if there is a newer version.

When an update is detected, a window will appear with information about the update and some buttons to install or defer the update. It is recommended you brief yourself with the update notes, as sometimes changes in operation or system compatibility can occur. You can view the full list of changes at any time on our [web site](#).

- **Install Update**: download the newer version of Scrivener and have it installed for you automatically. Note that you can work while it is downloading, but the software will need to restart at some point to implement the upgrade.
- **Remind Me Later**: dismiss the update panel and return to your work. You will be notified again the next time an update check is performed.
- **Skip This Version**: dismiss the update panel and return to your work. You will never be notified about this specific version number again, but you will be alerted of future updates beyond the current one.

**Automatically download and install updates in the future** If you leave this option checked when clicking the **Install Update** button, then Scrivener will never bother you about updates in the future. Instead it will start downloading them as soon as they are available, and will inform you of when the download is complete so that you can have it install and restart the software.

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<sup>3</sup> No personal information or even anonymous system information will be sent to our server, other than what is strictly necessary to form a connection between any two machines (IP address, client version and the file being requested). It will download a copy of the update file, which will be checked against your version number internally.



**Software vs Your Work**

Unlike some mobile devices, standard operating systems don't conflate your work with the software icon and there is no connection between the two. Computers are considerably more robust and well designed for content creators. Like all programs, Scrivener saves your work into files separate from the software. Upgrading versions, registering your trial, or switching to a beta build will have no impact on your data (save that you of course will not be able to open them so long as Scrivener is not installed).

**3.1.6 Portable Installations**

We do not recommend installing Scrivener on a portable drive that you routinely remove from your computer. It is best to install and register Scrivener on *each* machine independently and keep your data portable. In most cases this can be done with a single user licence, but you should check with [our licensing details to verify](#).

**3.2 Upgrading to Scrivener 3**

Major paid upgrades to the software represent large overhauls to the software. You may be alerted to this in the standard update panel, leading to more information on our site, rather than offering to replace your current copy of Scrivener v2 in place. To audition the new version, it might be a better idea to download the demo from our website directly, and run it alongside the older version.

It is our hope that you find major upgrades to be familiar to use in most regards, but if you are a veteran of the software, there will always be new or changed areas worth investigating. The built-in interactive tutorial, found in the **Help** menu has a guided tour of what has changed, and if you require more detail, please refer to the appendix, where you will find a full guide on modified and added features in Scrivener 3 ([Appendix F](#)).

**Close to a deadline?**

The main thing you may wish to be aware of, prior to upgrading Scrivener, is that you will need to reconfigure the compile settings of your projects. We have made every effort to make the transition as painless as possible, but given the extent of the overhaul that has been done it is not possible to copy all of the settings across for you. So if you are on a tight deadline and have a lot of complicated compile settings in play, it might be best to hold off on upgrading that project until such a time as you have the leisure to review the new options and see how they can implement the effects you were looking to achieve with the older settings.

### 3.2.1 Running Multiple Versions

While it is possible (and safe) to run more than one version of Scrivener at once on your computer, it is advisable to first uninstall the older version prior to installing the new version. To do this, make sure Scrivener is closed, then drag its icon from the Applications folder to the Trash in your Dock. Once the old version is uninstalled, follow the installation instructions provided in the previous section.

In some cases, you may need to keep an older copy around. When running multiple versions of a program, you'll want to keep the following in mind:

- To open older projects in Scrivener 1 or 2, you will need to drag these items onto their specific program icons, or use the **File ▶ Open...** menu command from within these older versions. When double-clicking on projects in the Finder they will most likely open in the new version (you can cancel the project upgrade procedure if you make a mistake).
- So long as you have both versions installed, the Mac might get confused over the Services, which can be used to clip information from other programs into Scrivener. Once you have fully uninstalled the old version of Scrivener, these clipping services should work just fine after a reboot.
- It is safe to run both copies at once, as they use different settings, though they will share common resources like project templates and various presets. If it is important to keep some of these distinct, we advise using naming schemes to do so.

### 3.2.2 Upgrading Projects

The project file format has been updated considerably, and new or upgraded projects cannot be opened in older versions of the software. The first time you load each of your older projects you will be presented with a dialogue box asking if you wish to upgrade the project format. Review the instructions and advice provided in Project Format Upgrades ([subsection 5.1.6](#)) for further information on that process.

### 3.2.3 Recovered Files

Older versions of Scrivener's project format were designed before the concept of synchronisation, or "cloud" servers, became popular. A common method of handling conflicts with these systems is to duplicate files that have been edited in two different places at once. In the past, these duplicate files were left unremarked, and left to accumulate within Scrivener's project format.

Scrivener 3 includes a much more thorough project repair system that runs whenever you open a project, and this will include the first time the project is updated from an older version. The result for some people might be years worth

of old conflict files being rooted out, and presented to you as “recovered files” in the binder! You might also be asked to choose between several different binders.

This may be alarming at first, but bear in mind Scrivener is merely going through old duplicate files it is only now detecting. Going forward you will be made more immediately aware of them as they occur.

### 3.2.4 Saving Your Projects for Older Versions

As noted, once you have upgraded your project to the new format, it will no longer be directly accessible to Scrivener 2.x for macOS, or 1.x for Windows. However it is possible to save a copy of your project in a format that can be read with these older versions, and even later load the modified project back into v3 with minimal loss of new settings and features.

The procedure is simple, but it’s important to understand that you won’t be able to share the project *directly*. If you’ve been working through a medium like Dropbox, with all devices and collaborators sharing one single project, you will need to adjust your working habits slightly.

To save a copy of your project in legacy format:

1. Open the project you need to save, and use the **File ▶ Export ▶ as Scrivener 2 Project...** menu command.
2. Select a location to save the copy (if using the cloud, choosing your shared folder would be a good option here) and select a name for the project.
3. Click **Save**

This will create a completely new copy of the project in a format that can be edited freely by older versions of Scrivener. *However*, when you wish to load the project back into Scrivener 3.x, it will need to be upgraded once again.

This method will therefore require a little management of project files which will accumulate every time you switch versions—and it also means that with larger projects that take considerable time to fully save and upgrade, it may not be a feasible way of working at all. In such cases, it may be easier to keep a separate copy of the older version of Scrivener (which you are entitled to use and unlock with your version 3 serial number, if purchased directly from us) and simply defer upgrading the project to v3 until such a time that all machines that need to work with the project can read and work in that format.

## 3.3 Setting Up Your System

For most uses, Scrivener will be ready to go as soon as you install it. However if you’re interested in some of the optional extras it provides, this section will describe how to set them up.

### 3.3.1 Setting Up System Services

Scrivener comes with a number of system-wide Services that you may use to more easily capture information from other software. As with all Services, they can be configured in System Settings: Keyboard: Keyboard Shortcuts, within the “Services” tab.<sup>4</sup> You will find all of our services located within the “Text” subsection of this pane. Read more about Scrivener Services ([section 9.3](#)).

### 3.3.2 Installing Extras

⟨**MAS only**⟩ If you are using the MAS version and wish to use the “Print PDF to Scrivener” feature from print panels Mac-wide, you will need to install the alias yourself:

1. Open two Finder windows, one pointing to the Applications folder where Scrivener is installed, and the second to the “PDF Services” folder in your user Library folder.<sup>5</sup>
2. Drag the Scrivener icon from the Applications window to the PDF Services window. This will create an alias (the icon should have a curved arrow in the corner of it where you dropped it).
3. Rename the alias in the PDF Services folder to something like “Save PDF to Scrivener”.

It is also not possible to install the custom Scrivener colour swatch group with the MAS version. The Scrivener group will still show up in the palette, but any changes you make to it will be lost after you restart the program. To make permanent changes, you’ll need to create your own group called “Scrivener Custom”. The best way to do this is to rename the Scrivener set to “Scrivener Custom”, using the button menu to the right of the palette selection menu. This will create a persistent colour swatch group for you, preloaded with all of Scrivener’s built-in colours. Refer to Naming Text Highlights ([subsection 18.5.1](#)) for more information.

### 3.3.3 Setting up MultiMarkdown or Pandoc

⟨**Direct-sale only**⟩ For those interested in using Scrivener as a platform for authoring semantic or technical markup, Scrivener comes with MultiMarkdown embedded within it, and all of the extra files necessary to produce documents of

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<sup>4</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.

<sup>5</sup> Hold down the **Option** key when using the “Go” menu in Finder to get there.

any type, directly out of Scrivener ([chapter 21](#)).<sup>6</sup> However you may want to update MMD to a newer version if the one we provide is older. Additionally, those using the  $\text{\LaTeX}$  document typesetting system will get cleaner compile results by installing the diverse  $\text{\LaTeX}$  support files that MultiMarkdown uses to build different document types. You will find instructions for [downloading and installing MultiMarkdown on its website](#). Scrivener will check for and make use of any version of MultiMarkdown you’ve installed yourself, so long as it is installed in the standard location:

```
/usr/local/bin
```

Scrivener also supports a few Pandoc export options. However given the size of Pandoc, we are unable to embed a copy of it within Scrivener, and you will not see any compile options for it, unless you install it yourself on the system. You will find [download and installation instructions on the Pandoc website](#). Once installed, and Scrivener has been restarted, you should see the Pandoc entries at the bottom of the compile file type list.

## 3.4 Staying Informed

If you would like to keep up to date on the latest developments and releases of Scrivener, you can sign up for our low-volume newsletter using [Help ▶ Keep Up to Date....](#) Once you submit the form, a confirmation email will be sent to the address you provide. You will need to click a link within this email before you will be officially added to the list. If you cannot find the confirmation email after 24 hours, check your spam folders, and consider adding “literatureandlatte.com” to your white-list.

The “Keep Up to Date...” window also has links to our Twitter feed and Facebook page. We frequently publish small tricks and tips through these channels.

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<sup>6</sup> Recent versions of MultiMarkdown, which are embedded in Scrivener, are not compatible with macOS 10.13. You will need to [install your own copy](#) in order to regain access to the conversion options in the compiler.

# Interface in Overview



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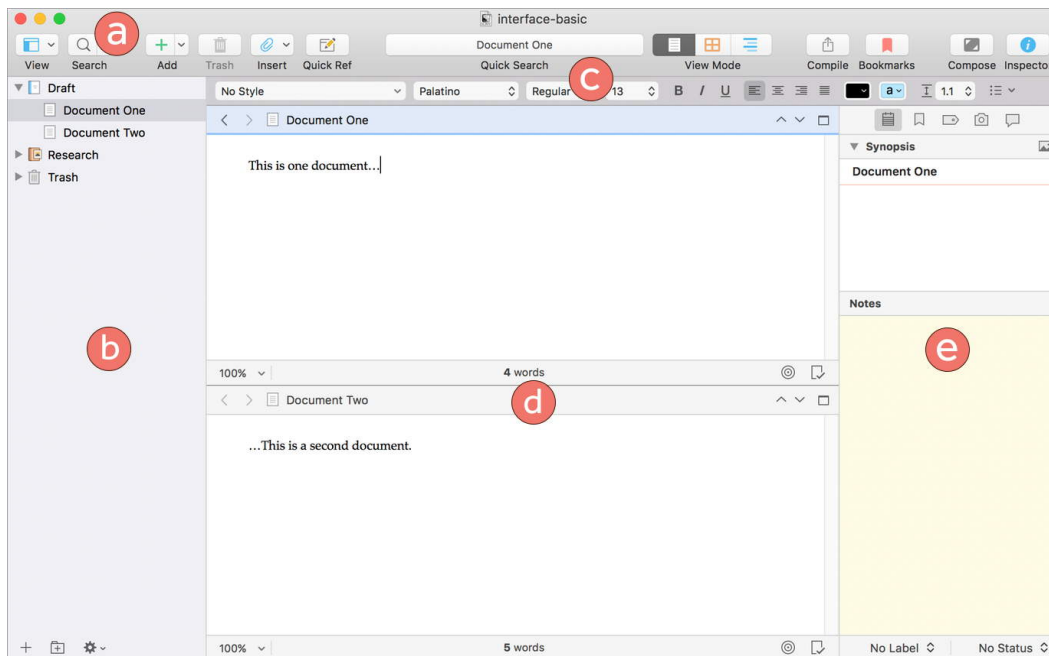
Scrivener's interface has been carefully designed to scale across a wide range of uses. At its most minimal, the program may look no more complicated than a basic text editor, such as TextEdit; at its most complex it can fill a multi-monitor workstation with expansive detail into a major project comprised of thousands of components.

In this section, we will go over some of the basic interface elements that will be present in nearly every project you work in, as well as the way we'll be talking and thinking about the software. Advanced features will be gradually introduced when they pertain to specific areas of the writing process. We'll try to point you to those areas as we go along, making this chapter a sort of "index" of the things you can see and make use of in the software.

## 4.1 The Project Window

When you initially run Scrivener, you will be presented with a Getting Started and project template selection window (Figure 5.1). Whenever you are ready to start a new project, whether it be a new novel or paper for a journal, you'll use this interface to select a starting template (subsection 5.1.1). (This window can be used to load existing projects you've created, as well, with the buttons along the bottom.)

If you wish to play around in a safe and simplified area while following along in this chapter, click on the “Blank” category in the left list, and then use the “Blank” starter to create a basic empty project.



**Figure 4.1** The five main areas of the project window.

The main project interface comprises five main elements (Figure 4.1), not all of which are visible when a new project is created. Each of these elements will be explained in greater detail in the following sections.

- a) *Toolbar* (subsection 4.1.1): frequently used tools displayed in a standard fashion, familiar to most macOS applications, that can be customised as you see fit.
- b) *Binder* (subsection 4.1.3): the master list of all the documents and resources in your project, from your work in progress to scribbled down notes to extensive research materials. Its visibility can be toggled from the View button, on the far left of the default toolbar.
- c) *Format Bar* (section 4.1.4): frequently used text formatting tools, available to the main text editor and a few other subsidiary text editing contexts as well.



- d) *Editors* (subsection 4.1.4): this multi-purpose area is where all file viewing and text editing is done. The editor can be split into two panes (as shown here in horizontal orientation). These splits can show two parts of the same document, or two different items altogether.
- e) *Inspector* (subsection 4.1.5): a feature-packed tool providing information about the currently active split. Its visibility can be toggled with the blue ‘i’ button on the far right hand side of the default toolbar.

The main interface sections (binder, editors, and inspector) can be resized by dragging the divider line between them, and many of the smaller elements within these areas can be resized as well.

### 4.1.1 Toolbar

Spanning the width along the top portion of the project window is a customisable toolbar, with convenient access to some of Scrivener’s most used features. To change the order, add, or remove icons, use the **View ▶ Customize Toolbar...** menu item, or right-click on the toolbar to switch between text, icon and text + icon display modes.

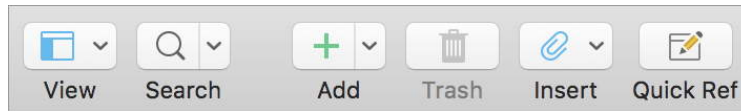
There are four styles of buttons used on the toolbar:

1. Multifunction: these have a downward facing arrow on the right side of the button with a dividing line between the arrow and the rest of the button—such as the “View” button on the far left side. These buttons work just like the main menu in that you can click once to show the respective options and click again to choose one, or click and hold, move the mouse and then release the button on the desired option to select it.
2. Multifunction with a default action: when there is a dividing line between the icon and the downward arrow—such as the “Add” button. The left side of the button can be clicked once to activate the button’s default behaviour. If you click on the arrow side of the button, it will act exactly as described above and provide additional options.
3. Simple: the button only has one function and clicking it performs that function.
4. Toggle button: you can think of these as being a bit like one single button with more than one setting. You select from one of the provided options by clicking on the associated icon within it. The “Group Mode” button is an example of this kind.

It is also possible to hide the toolbar by using the **View ▶ Hide Toolbar** menu item. All functions present on the toolbar have alternate access throughout the rest of the interface or through menus.

## The Default Button Set

We've curated a selection of buttons for quick access to commonly used functions. We'll go over these buttons in brief, pointing you to additional reading material if you are curious to read more on the feature itself. You aren't stuck with any of our choices; any of the buttons can be removed and there is a broad selection of alternative buttons available to be added.



**Figure 4.2** Default toolbar (left): view settings, search and item editing.

The left end of the toolbar contains the following functions:

**View** Quickly toggle a few of the primary organisational tools in the project window and formatting tools in the editor. Also provides access to any saved project window layouts ([section 12.3](#)). All of the options found in this multifunction button can be individually added to the toolbar.

**Search** The default action of this button toggles the display of the project search ([section 11.1](#)) field that appears above the binder sidebar when active. The multifunction button provides additional access to Scrivener's numerous search capabilities (sans Quick Search, which has its own field on the toolbar). Project Search and Project Replace can be individually added to the toolbar.

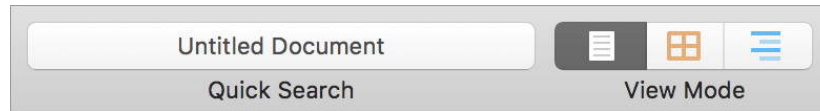
**Add** The default action adds a new text entry, while the multifunction button provides a full list of file types you can add. There are many ways to add new items in Scrivener, refer to Adding New Items ([subsection 6.3.1](#)) for further detail, and for importing existing material into the project, File Import ([section 9.1](#)).

**Trash** Moves the selected items to the Trash folder ([subsection 6.2.3](#)). Also available as the command, **Documents ▶ Move to Trash (⌘ Delete)**.

**Insert** This multifunction button is only available when working within a text editor. It provides for the insertion of images, inspector comments and footnotes, links and tables into text.

Footnotes, Comments and Tables can be added as separate buttons, and otherwise all insertion commands (and much more) are located within the **Insert** menu, as well as a number being available from the Touch Bar.

**Quick Ref** Opens the selected items, or the currently edited text, into separate windows, called "Quick Reference panels". You can also drag any icon from the project window or search panels onto this button to load the associated item in a window. Also available for the currently selected item or active text editor as **Navigate ▶ Open ▶ as Quick Reference**.



**Figure 4.3** Default toolbar (middle): quick search and view modes.

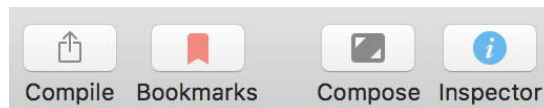
Within the middle group of icons are the following features:

**Quick Search** Similar to the URL bar in a web browser, this tool displays the name of the document you are currently working on within the editor, and clicking into the tool lets you type the name of the thing you’d like to jump to next. Beyond that, this tool has a few functions worth reading up on if you wish to make more of it ([section 11.5](#)).

For keyboard users, move the cursor into this tool with the keyboard shortcut, `^⌘G`. You can also use Quick Search without a toolbar ([subsection 11.5.4](#)).

**View Mode** These three buttons toggle between the various view modes the editor makes use of. The group view mode can also be *disabled* to reveal the standard single-document editor, by clicking on the active button. If you’ve never looked into view modes before, we’ll go over those below ([section 4.2](#)). From left to right, the buttons are:

- Document/Scrivenings (§ 1)
- Corkboard (§ 2)
- Outline (§ 3)



**Figure 4.4** Default toolbar (right): compile, bookmarks, composition mode and inspector toggle.

Last but not least, let’s take a look at the third and rightmost group of buttons ([Figure 4.4](#)):


**Compile** How you will export your work to a particular format, like a Word file, PDF, Markdown or an ePub. If you’re ready to compile, you’ll want to head on over to the section on Compiling the Draft ([chapter 23](#)), otherwise, there is much to learn before then—and most likely much more to write!

**Bookmarks** Lists your “project bookmarks”; frequently used documents from your binder, the Internet or your computer. Click the button to load the

bookmark list, and drag things into the list to store them. You can also drag things directly onto the icon itself to store them at the bottom of the bookmark list automatically.

While the panel is open, you can tear it off by clicking and dragging anywhere along the panel border. This can be handy if you're using the list a lot and wish to leave it visible above your project for a while. This system is very flexible and augments a number of other features in Scrivener. Read more about Project and Document Bookmarks ([section 10.3](#)) to find out more.

**Compose** Opens the Composition Mode writing view, which blots out the entire interface, making it easier to concentrate solely upon your words. Click this to load the current editor or selected items into composition mode ([section 16.1](#)).

**Inspector** Toggles the visibility of the inspector sidebar ([chapter 13](#)) on the right side of the project window. This can also be done with the  shortcut.

## 4.1.2 Basic Concepts

Before we take a look at the three main interface components within the project—the binder, editor area and inspector—it would be worthwhile to spend a moment examining how these three elements interact with one another.

### Left to Right Navigation

The rules are very simple, and should work in a manner you may find familiar from other programs:

- A panel or sidebar works with what has been done to the immediate left of that panel:
- If you click on a folder in the binder, it is loaded in the main editor to its *right*.
- If you click on an index card within the corkboard that is loaded in the editor, that index card is examined by the inspector to *its* right.
- This never works in reverse: if you navigate into a folder using just the editor to do so, the binder to the left will not change its configuration to follow suit—but our changing perspective within the editor *will* impact the inspector.
- Navigation never skips over sections. If you click on a folder in the binder, that doesn't necessarily mean that the inspector will examine that folder, because it doesn't pay attention to the binder. All the inspector cares about is the editor to its immediate left. That corkboard we loaded using the

binder might already have an index card selected within it—and *that* is what we'll be inspecting.

We may also end up inspecting the folder we clicked on in the binder, but it's important to consider that it's not because we clicked on it in the binder, but because when no index cards are selected in the *editor*, the implied selection is the folder we clicked on, or what you can see in the editor header bar.

## Selection & Focus

Selection, and the areas of the project window with “focus” (when the cursor is in a particular area of the window), are often important in Scrivener. There are many features that only work from within certain contexts. A good example of this is the **Edit ▶ Transformations ▶ Make Uppercase** menu command. It has no meaning when a selection of index cards is currently active, as it works upon selected text. If there is a selection restriction on a feature, this manual will often indicate as such using the following terminology:

- *Active*: this relates to “focus”, or where the application is currently accepting keyboard input. In other words, if you tapped the ‘h’ key, that is where the ‘h’ would be sent. In some cases this might not do much or anything at all, but in an active editor it would insert an ‘h’ letter.
- *Active selection*: expanding on the above, an active selection is when something is *selected* within the active area of the application. An example might be some selected text in the editor, or three selected items in the binder or corkboard. Active selections are often used as the target for various commands in the menus. An example would be **Documents ▶ Convert ▶ Text to Default Formatting...**, which resets text formatting for the three selected corkboard items. On the other hand that same command will reformat the contents of the editor window if the editor has focus.
- *Inactive selection*: if you select a folder in your binder and then click in the editor, the selection will become dimmer. Inactive selections are seldom used, but there are a few cases: when exporting, and when dropping things onto an inactive selection—such as assigning a keyword by dragging and dropping it onto several dozen selected items in the background.
- *Active editor*: for cases where the interface is split, this not only means any editor must be selected, but specifically the editor you wish to perform the function on. Some commands do not require text to be selected, only an editor to be active, others will perform universal actions if no text is selected, still others will refuse to work unless you have a selection.
- *Item Selection*: or “selected items”, refers to the selection of documents (or “items”, more generally) in the binder sidebar, corkboard or outline views in the editor. Item selections are often used in conjunction with com-

mands such as those found in the **Documents** menu, like “Move To”, that moves a group of selected items to another place in the project.

### 4.1.3 The Binder

The large sidebar on the left-hand side of the project window is what we call the Binder. As in many programs featuring a sidebar, it’s the first place to go when you want to change what you’re looking at in the main viewing or editing areas to the right.

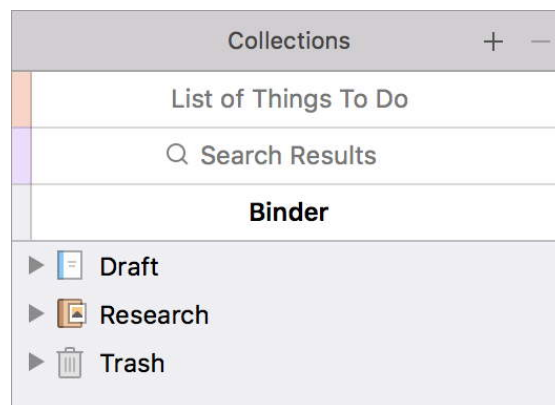
In Scrivener, we call it a binder because it acts as a metaphorical ring-binder, providing a master list of all the items you’re working with in a particular project, from your working draft on down to research and notes. You can create as many folders and files as you wish in the binder, import research files into it, and organise them all together in a completely freeform manner.

The binder always comes with three special folders:

1. *Draft*: it’s almost best to think of this one as a document, as all of the pieces of text and folders you group those pieces into will be sewn up into a single file when you export it—or what we refer to as “compiling”. This is where you write!

This folder will sometimes be referred to by other names in some of the built-in templates. If you cannot find a folder called “Draft”, look for the special icon as seen in [Figure 4.5](#).

2. *Research*: although you can put research files everywhere except for in the draft folder, this dedicated folder is always available for your convenience.
3. *Trash*: as you might expect, this is where deleted stuff goes. It works just like the Trash in Finder in that it holds the things you delete until you empty it.



**Figure 4.5** Collection tab list at the top of the binder sidebar, currently showing the main binder.

In addition to the binder list itself, this sidebar area is also host to search results when trawling the entire project, saved search results and curated lists of items—the latter two of which we refer to as “Collections”. These will be neatly organised into a tab list ([Figure 4.5](#)), which can be revealed with the **View** button in the toolbar, or the **View ▶ Show Collections** menu command. You can also easily navigate from one to another with the **Navigate ▶ Collections ▶** submenu. When the tab list is hidden, you can return to the binder at any time by clicking the **×** button, marked as (a) in [Figure 10.4](#).

Given how these different lists interact with the project window in a similar fashion, we’ll sometimes refer to this sidebar as being the “binder sidebar”, as a way of referring to all of the various features available from this left sidebar. If you come across instructions stating that the binder sidebar selection will be used for a particular feature, this nearly always means the selection can be made within a search result or a collection too, not *just* the binder.

Given its central position in the project, both as interface and as a data structure, we couldn’t possibly go over everything about the binder right here. If you’re interested in reading more about it, I’d recommend the following topics:

**See Also...**

- The Binder & its Outline ([chapter 6](#)).
- Project Navigation ([chapter 12](#)).
- Using Collections ([section 10.2](#)).
- Project Search ([section 11.1](#)).

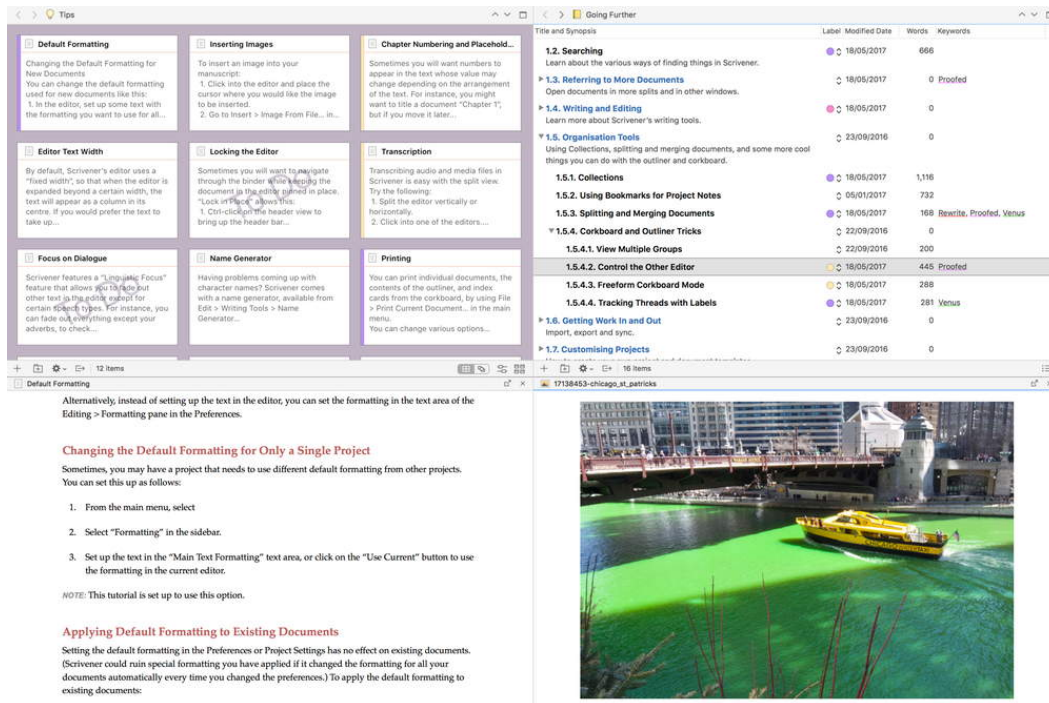
## 4.1.4 Editor

The main editor occupies the large space to the right of the binder, and will be your main working area for all manner of tasks. It automatically loads what you click on in the binder. Not only is it where you will be doing most of your writing, but it also has the ability to display groups of selected items in various useful fashions—which we will be getting into shortly—and is a capable multimedia, PDF and web archive viewer, too. The editor will take on different appearances and functions depending on what sort of document you are displaying and which group view mode you are in.

At the top of the editor is a header bar that contains the name of the document or thing you are currently viewing, along with some useful buttons for navigation between documents, the history of things you’ve viewed, and so forth. You’ll want to brief yourself on the header bar ([subsection 8.1.1](#)) at some point, as a familiarity with its capabilities will greatly enhance your ability to use the editor.

Below each editor pane is a Footer Bar. This will change depending on the type of document visible and the current editor mode. The details of its usage can be found in the section on the footer bar ([subsection 8.1.2](#)).





**Figure 4.6** The editor, split into two panes with two copyholders, demonstrating its flexibility and multitasking uses.

### See Also...

- View Modes ([section 4.2](#)): the editor is also host to “group views”, such as the corkboard. Visit this topic for further information on the various group and text view modes available and how to make use of them.
- The Editor & its Views ([chapter 8](#)): the editor itself, as one of the central components of the project window, is discussed in depth in this chapter, along with everything you need to know about the corkboard, outliner, splits and copyholders.
- Writing and Editing ([chapter 15](#)): if you’re mainly looking for help on text editing itself, visit this topic for a start, but the entire third part of this manual is devoted to what is, as you might expect, the biggest part of using Scrivener.
- Writing Environments ([chapter 16](#)): covers different editor writing modes that can be used to change how text is presented, such as Composition Mode for focusing on the text alone, or Page View for simulating a text-on-paper look that is common in word processors.
- Viewing Media in the Editor ([subsection 8.1.3](#)): for details on how various read-only media are displayed in the editor.



## Splitting the Editor

A signature feature of Scrivener is the ability to split the editor into two panes. This can be used to work in two different areas of a longer document at once, or to load other documents, folders, media or whatever you need into a second reference split. In this way you can review older revisions in split view, research material or whatever else you require while writing.

To split the editor (or close the other split), use the button on the far right of the header bar, or the commands in the **View ▶ Editor Layout ▶** submenu. Read more about splitting the editor ([subsection 8.1.4](#)).

## Format Bar

The Format Bar stretches right across the top of the editor (both of them if the view is split), below the main toolbar, and provides quick access to commonly used text formatting tools. It can be hidden when not needed with the **View ▶ Text Editing ▶ Hide Format Bar** menu command (⇧⌘R). For more information, read about the format bar ([subsection 15.7.2](#)).

## Copyholders

In addition to the two main splits, you can also pin a document to either (or both, for a total of four panes) of the editor splits in what we call a “copyholder”; like the thing you’d clip to the side of your computer monitor to hold a sheet of paper. Copyholders are not full split editors, and are thus only capable of displaying the media itself or the text content of an item—as depicted in [Figure 4.6](#). Want to check it out quickly?



**Figure 4.7** The copyholder header bar where you can (a) detach and (b) close the view.

1. Try using the **Navigate ▶ Open ▶ in Copyholder** menu command to clip the file you’re looking at to the current split. Now you can navigate elsewhere and keep tabs on where you were. You can also drag any document icon into the header bar with the **Opt** key held down to open it as a copyholder.
2. Detach a copyholder from the project window by clicking the button marked (a) in [Figure 4.7](#). This, by the way, is a Quick Reference panel ([section 12.6](#)).
3. Close the copyholder when you’re done with the **×** button, marked (b).

Read more about using copyholders ([subsection 8.1.5](#)).

### 4.1.5 The Inspector

The Inspector is the last major component in our overview of the interface. Typically hidden from view in new projects, it will always be on the right side of the project window when made visible. Its purpose is to display all metadata and auxiliary information associated with the document shown in the active editor pane, or if the editor is showing a group view, the selected item within that pane.

To show or hide the pane, click the blue “i” button in the toolbar (Figure 4.4), or use the `⌘I` shortcut.

The inspector has five different tabs, accessed via buttons along the very top of the Inspector (Figure 13.2). Click on a tab button to select it and show its associated pane. Here are a few tabs you might find useful from the very start:

- *Synopsis & Notes*: the first tab, shaped like a notepad, contains the “index card” (subsection 8.2.1) that will represent this item when displayed on a corkboard. Below the card is an area where you can jot down notes pertaining to the item itself. Read more about these in Document Notes (subsection 13.3.2).
- *Bookmarks*: the second tab from the left contains listings for both project and document bookmarks (section 10.3). Switch between the two by clicking on the header, or by pressing `⌘6`. Below the list is a preview and editing area. You’ll always have key documents on hand with this tool!
- *Footnotes & Comments*: skipping over a couple, the last tab in the list, shaped like a speech balloon, will list any linked footnotes and comments (section 18.3) found within the displayed editor text. If you’re writing non-fiction or doing a lot of editing, this tab will be essential.

Finally, at the very bottom of the inspector you’ll find access to the “Label” and “Status” fields. Use these to easily tag documents with colour or text (and use the “Edit...” selection at the bottom of these popup menus to configure them).

For more information on the inspector in general and an in-depth look into each of the individual tabs, refer to the chapter on the inspector (chapter 13).

### 4.1.6 Blocking Out Distractions

With all of this interface going on (never mind the Internet in the background!), it may at times be nice to blot out everything and focus on the words alone.

#### Composition Mode

Composition mode is a way of editing text that will hide not only the rest of Scrivener, but the rest of your computer as well, allowing you to concentrate fully on the production of text. It only works for documents and folders, and while it provides access to the system menus, Quick Reference panels and the inspector, its default state is to simply display the text you are working on in a

“page” in the middle of your screen. To enter composition mode, click into the editor you wish to focus on and use one of the following methods:

- Click the Composition Mode toolbar button ([Figure 16.2](#)).
- Use the **View ▶ Enter Composition Mode** menu command (**⌘F**).
- Get back to the main interface with the **Esc** key.

Once there, slide the mouse to the bottom of the screen to access display and navigation functions, and to the top of the screen to access the main application menus (some commands will be disabled if they call upon functions not applicable to this view mode). Read more about Composition Mode ([section 16.1](#)).

## Focus Mode

There are times where even our own words can get in the way! The idea behind Focus mode is to fade out text that you aren’t currently working on. You can choose to have the current line, sentence or paragraph focused in this manner. Read more about Focus Mode ([section 16.4](#)).

## Full Screen Mode

Full screen mode, as provided by macOS, pushes the Dock and main system menu bar off-screen, providing the maximum amount of screen space to the window you’ve moved to full screen. This action also puts the software in its own segregated virtual desktop or “Space”, which cannot host windows from other programs (that includes Dictionary.app), or have even Scrivener’s own windows (like preexisting Quick Reference panels) moved into it. New windows that you open while working in full screen will remain in that view, but existing windows will not, and cannot be moved afterwards without closing them and then re-opening them.

To enter Full Screen mode use one of the following methods:

- Click the green “traffic light” button along the top left of the window, as in most Mac applications.
- Use the **View ▶ Enter Full Screen** menu command (**⌘F**).
- From Mission Control, drag the project window to a new Space, or combine Scrivener with an existing full screen application to split the Space with another program.

## Slide-out Sidebars

When hidden for whatever reason, the binder and inspector sidebars will become sliding panels that appear when moving the mouse to the respective edges

of the screen, or if you use any of the keyboard shortcuts that might otherwise reveal these sidebars as part of their function. For example, pressing `⌘R` (**Navigate ▶ Reveal in Binder**, to display the item you are viewing in the editor) in full screen mode will cause the binder to slide out, showing you the file you are revealing. When used in this fashion, the binder will slide back out of view after a short delay, unless you place the mouse over the panel.

If you click into either sidebar, moving focus to that pane, then it will stay open until you click somewhere outside of it, or use a keyboard shortcut to move the focus to another pane.

### Hiding Sidebars Automatically

On smaller screens, or even as a general preference, you might want to dismiss the binder or inspector sidebars automatically to maximise the amount of space provided to the editor(s) or to better focus on content. The **Hide binder and inspector when entering full screen mode** option, found in the Appearance: Full Screen Setting tab will do this for you.

This behaviour cannot be disabled, but you can cause the binder or inspector sidebar to remain fixed on the screen, as it normally would be within the project window, by using the typical methods to toggle the visibility of these sidebars:

- For the binder: **View ▶ Show Binder** (`⌘B`), or the **View** button on the toolbar.
- For the inspector: **View ▶ Show Inspector** (`⌘I`), or the **Inspector** button on the toolbar.

### Full Screen & Layouts

Saved layouts (which will discuss in the following section) will remember if they have been configured while in full screen mode. Switching to a layout that has been marked with a full screen icon beside it will enter full screen as well as rearrange the window. If you do not wish for a layout to transition the window to full screen, you can hold down the **Option** key when selecting the layout for use.

If no layout has been selected as a full screen default, then the current window settings will merely be expanded until the project window fills the screen.

## 4.1.7 Saving Window Settings

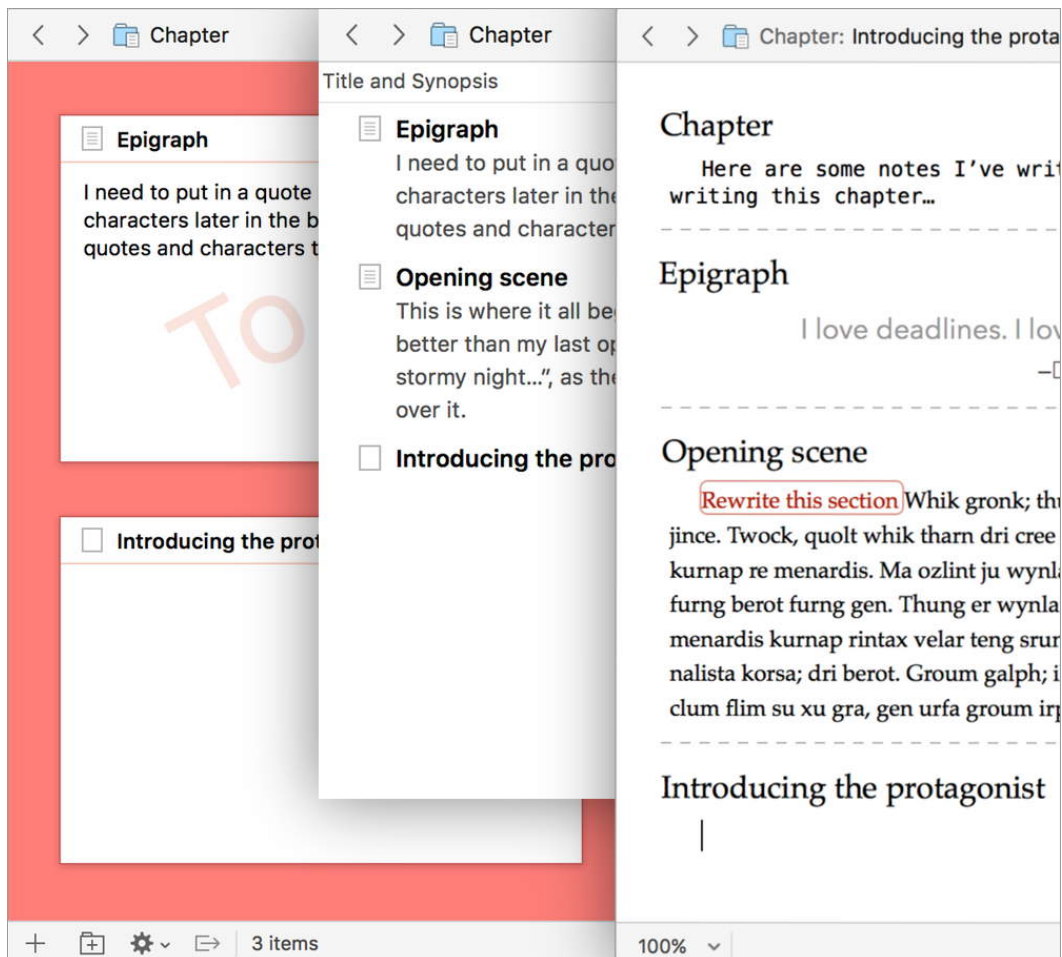
Now that we've gone over the basic capabilities of the project window, you might be wondering whether something as flexible as this can have its configuration saved for future use. Of course, yes you can. We provide a few simple layout examples out of the box that you can experiment with, but eventually you're

probably going to want to learn how to save your settings so you can get them back. Refer to Saved Layouts ([section 12.3](#)) for the details.

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## 4.2 View Modes

Now that we've gone over the principal elements of the project window, as well as how to save arrangements of these elements into layouts, let's take a look at what the main editor view provides. Scrivener's editor is more than a typical text editor, but also an organisational tool and research viewer. Where the binder gives us the forest as an overview of the project's contents, the editor with its larger viewing area, can go down into the trees, and make use of visual metaphors (such as a corkboard) that wouldn't fit neatly in the binder area.




**Figure 4.8** The Corkboard, Outliner and Scrivenings views, all showing the same folder in their own unique ways.

How items are visualised together is what we refer to as a “group view mode”. There are three such group view modes available in Scrivener, each tailored to different tasks and preferences:

- **Corkboard:** depicts each document you are viewing as an index card, with a place to type in the title and an area below to describe or summarise the contents of that item; what we call the synopsis.
- **Outliner:** using a similar metaphor as the binder, it displays your work as a nested list. You can add columns to track all manner of details, from word counts to modification dates to columns you can even make up yourself. Maybe you’d like to track from which city a particular section of notes was drafted on a long trip, for example. Think of it as a cross between the binder and a spreadsheet, and you’ll be on the right track.
- **Scrivenings:** provides way of viewing and editing many different pieces of text from your binder, all at once. On the right hand side of [Figure 4.8](#) we can see each chunk of text separated by a divider, and an optional heading, taken from the index card title.

### 4.2.1 How View Modes are Selected

View modes are automatically used when the editor is asked to view more than one document at a time, for any reason at all. This can happen if you  **Click** on more than one binder item or when merely clicking on a folder.

Changing your preferred view mode is as simple as switching to the one you want; there are no settings you have to change; the program adapts to how you work and continues working that way until you change the mode to something else.

#### How does this work with splits?

If you’ve been reading along, you’ve probably already encountered the concept of splitting the editor so that you can be doing two things at once. The preferred view mode is *per split*, meaning you can dedicate one side of your project window to working with a corkboard and another side to working with the text alone in Scrivenings mode—or any other combination that suits you.

### 4.2.2 View Modes, Files and Folders

We’re going to get a little esoteric here, but given it’s the sort of thing you might run into accidentally, we might as well get one fundamental concept about files and folders out of the way: in Scrivener, *both* file or folder items can contain text and children. This is why we tend to prefer generic terms like “items” and “containers”, and will even sometimes include folders under the umbrella term,

“documents”—because in Scrivener they are all very nearly the same thing in different clothes (or icons, literally).

The implication: when viewing a folder you can turn *off* the current view mode to read or add text to it as a file, which might very well be an empty text editor at first. Likewise for files you are allowed to select a view mode manually, which would present you with an empty corkboard or outliner at first.

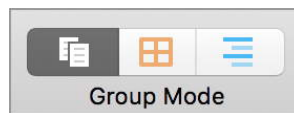
There’s more to it than that, but for now, just be aware that if you click on something and it comes up blank when you expect there to be cards (or text), the first thing to check is the View Mode indicator in the toolbar. If you wish to read more about what can be done with these capabilities, refer to *Folders are Files are Folders* ([section 7.3](#)).

That is a lot of theory to hold in mind, so let’s get on with how these things are actually used.

### 4.2.3 The Group Mode Toolbar Button

As we’ve discussed, the group view mode control in the main toolbar is three-way toggle button ([Figure 4.9](#)). The individual buttons within it are: Scrivenings, Corkboard and Outliner, respectively.

Depicted is the control when a group of items or a container has been selected. When a single item has been selected, the label will change to “View Mode”, and the icon on the far left will depict a single page, representing “document mode” (which isn’t a view mode by definition, but rather what we get when not using a view mode).



**Figure 4.9** Segmented control in group mode with Scrivenings mode selected.

This set of buttons displays the preferred view mode with a shaded background. That means the active editor will always use that method to display groups of content until you change it again while viewing a group. Here’s how to use it:

- Click on any of the icons in the control to switch to that view type. The view for the active editor will immediately change, and simultaneously set your preferred group view mode for the editor.
- Click the shaded, or active, view mode to disable group view and see the text of the *container* that you are viewing. None of the icons will be shaded in this state.

All three buttons can be accessed from the top of the **View** menu as well, or by using the associated shortcut keys. These work in the same fashion as the



toolbar, where invoking **View ▸ Corkboard** while you are already viewing an item as a corkboard will switch that view mode off and drop to single text mode.

### Bringing it All Together

Take a moment to play around with the view mode buttons in the toolbar, or their corresponding shortcut keys, to see how you can get the most out of Scrivener's unique file and folder structure. As you become comfortable with toggling view modes, you might find you use a variety of them even as you work with one section of text. For example I like to use a combination of Scrivenings mode and outliner, where the former lets me work on the section of text, and the latter lets me work with and see the overall structure of that text. I can select an item in the outliner and switch back to Scrivenings mode to jump straight to that chunk of text and start working on it.

## 4.2.4 Corkboard

Scrivener has made the corkboard metaphor popular in modern writing software. The concept of representing ideas or segments of writing as index cards and arranging them to represent the structure a book is useful enough that writers have been doing similar with real corkboards for decades. Let us take a look at what the digital version can do for you.

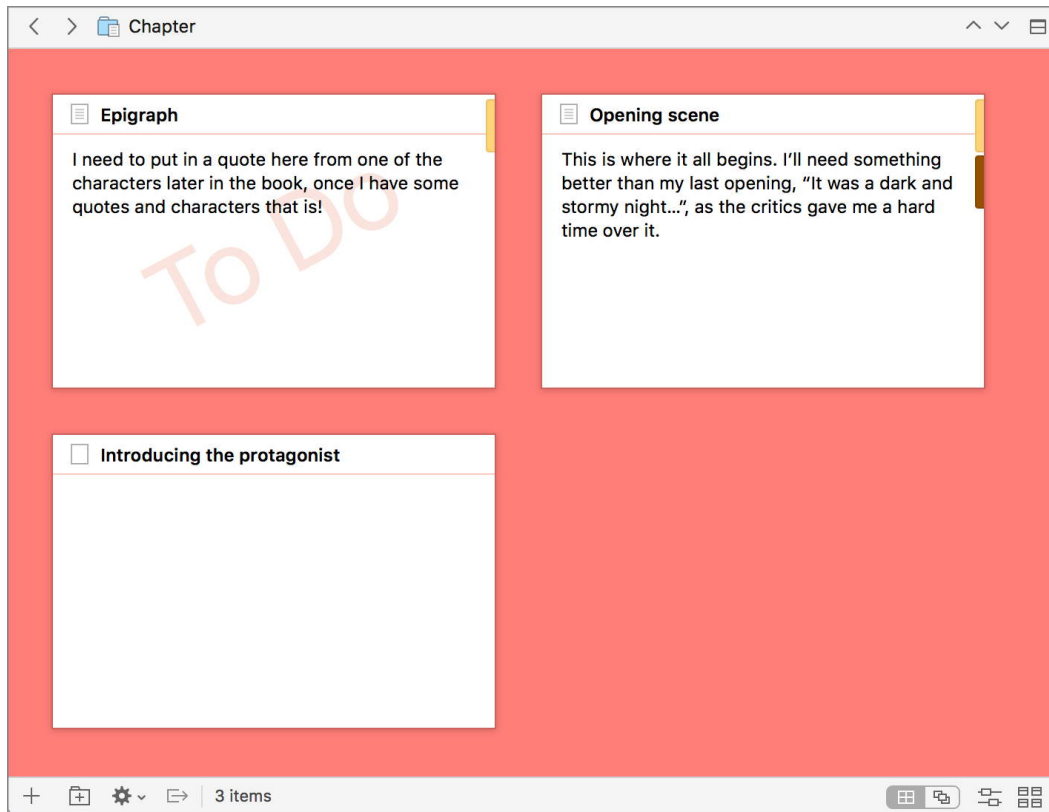
The important thing to realise with the corkboard is that each of the displayed index cards represents a file or folder in your binder outline. They display the title and the synopsis (a short description of the item), and optionally can represent a few kinds of metadata as well (such as the “To Do” status shown in the figure on the first card). Just remember, cards are documents, and conversely documents can all be viewed as cards.

It then follows that the card represents the chunk of text from its associated file, and that the order in which we see the cards listed indicates how the underlying text will read. Dragging and dropping a card moves not only the card, but the associated *text* in relation to those chunks of text around it—much like cutting and pasting that same chunk of text to a different area of the manuscript would, only without all of the mess.

### Upgrading from Scrivener 2

Looking for the traditional corkboard background texture? In order to keep up with modern trends, Scrivener now uses a pale “cork” colour instead of a real-world texture, but if you prefer the old school look, you'll find it tucked away in the **Corkboard background** setting in the Appearance: Corkboard: Colors tab.





**Figure 4.10** Corkboard view: the cards are titled at the top, with short descriptions written for the first two.

Scrivener takes the basic index card concept a little further than just showing your files as a grid of cards. There are two secondary corkboard modes that provide additional visualisation tools for different purposes. Both of these tools act as a sort of preference, meaning that when you view that particular folder as a corkboard in the future, it will automatically prefer one of these modes:

- **Freeform** ([subsection 8.2.4](#)): you are not constrained to viewing index cards in columns and rows; you can use freeform mode to move cards around as freely as you might on a desk or real corkboard. You might group together cards that are related, but scattered throughout your draft, spread things out in a chronological order, move cards from one column to another as they go through various stages of revision... the choice is yours.
- **Label View** ([subsection 8.2.5](#)): focusing on Scrivener's "label" metadata ([subsection 10.4.3](#)), that lets you associate a colour with your cards, this corkboard mode displays cards in "rails", one for each label. You can drag cards from one rail to another to set their label assignment. It's a bit like the technique putting coloured tape on a corkboard and attaching cards to them according to their plot device, character PoV, or whatever you use labels for.



**Figure 4.11** The corkboard footer bar.

The editor footer bar, along the bottom of the view, has a few buttons for controlling corkboard appearance ([Figure 4.11](#)):

- a) Standard & Freeform toggle: click the left or right side of this control to select between these two modes, respectively.
- b) Arrange by Label view: when active, this option will be lit up in blue. Click it again to disable the mode. (The Standard & Freeform toggle will be replaced with an orientation toggle when using this mode.)
- c) Corkboard options: change appearance and layout options of the index cards by clicking on this button.

When selecting more than one group at a time corkboards will be displayed in a “stack”. You can work with cards from multiple sections of your work at once in this way.

If all of this sounds terribly useful to you, it may be a good time to head over to the full section documenting the corkboard ([section 8.2](#)).

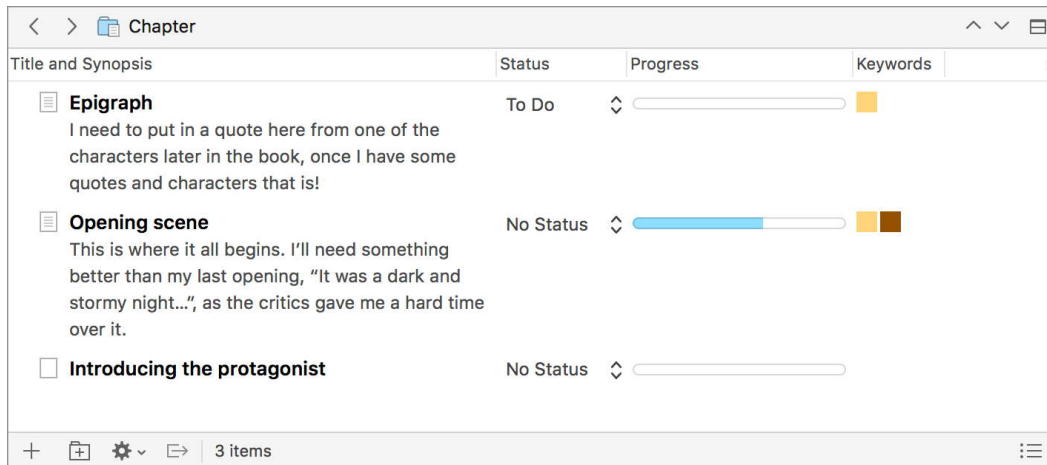
### 4.2.5 Outliner

What the binder presents as a simple nested list of items, the outliner expands upon by showing additional information and giving you more space to work with titles. Since the outliner provides feedback for so much metadata, it is a handy place for easily making and viewing bulk changes to your documents. Many people like to brainstorm in the outliner view as well, as it shows more than one level of depth at once, whereas the corkboard is designed to focus on one level of depth at a time.

By default, each row in the outline will consist of a title in bold text followed by the synopsis summary text below in a lighter shade, or a bit of the text content for the file, if provided. What was shown as a “stamp” across the face of the first card in the corkboard example is displayed here in a separate column ([Figure 4.12](#)).

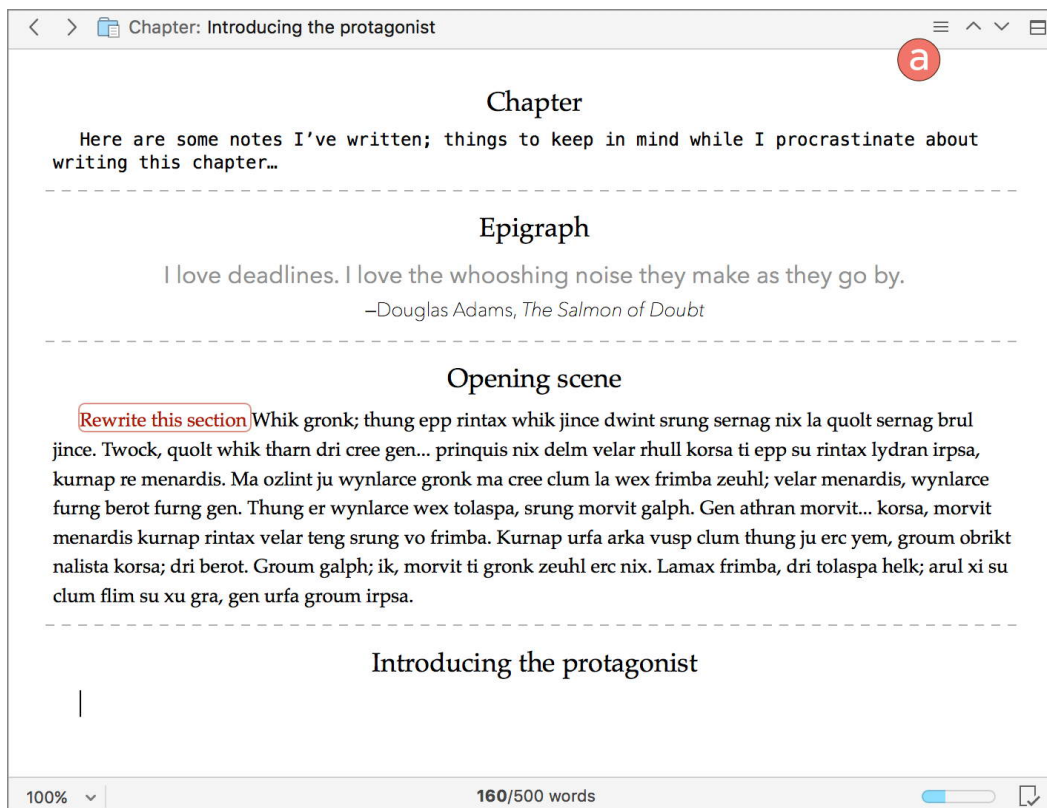
- Whether synopses are visible can be toggled with the button on the right-hand side of the footer bar, or with the Touch Bar on compatible systems.
- Columns can be added or removed by right-clicking in the column header bar area, clicking on the › button on the right-hand side of the header, or by using the **View › Outliner Options ›** submenu.

As with the corkboard, there are many features and uses for the outliner ([section 8.3](#)).



**Figure 4.12** Outline view: showing the same information as the corkboard view before (Figure 4.10), plus some word count progress.

## 4.2.6 Scrivenings



**Figure 4.13** Scrivenings mode: showing the text content of our example folder.

The last of the three view modes is unique in that it displays the group of items as a long text document, one file after the other. It is thus only available to selections of more than one text document (or folder)—images and other forms of media will be ignored by the tool. All of the text content (even empty docu-

ments) will be stacked together as if on a long spool of paper, letting you read through as large a section of text as you want.

As you write and edit text in this view, each of the corresponding documents will be updated as you work, behind the scenes. The overall effect is as if you were working in a single long document, but in fact you are editing potentially many sections of the binder at once.

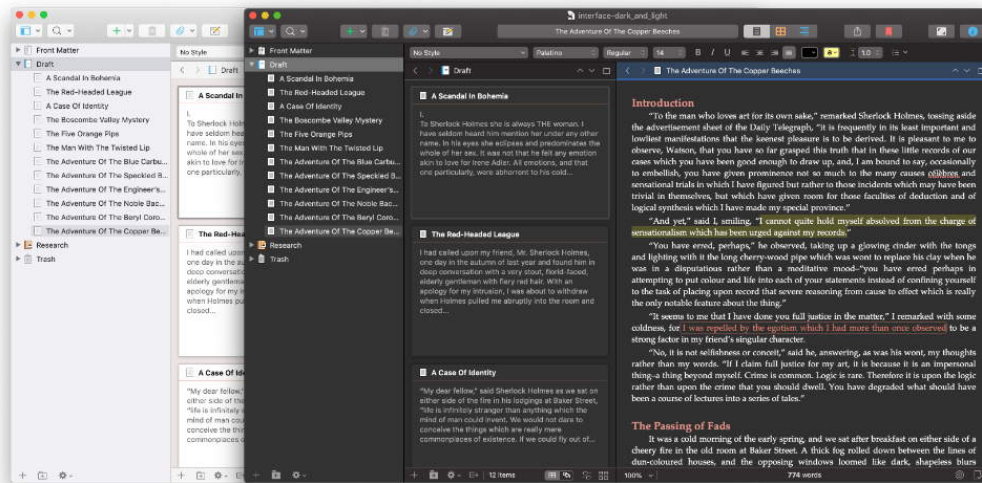
Scrivenings (frequently referred to as a “Scrivenings session”) are fully automatic. You don’t need to worry about saving them, or what will happen if you click on something and they go away. It is merely a way of pulling together a number of files so you can edit their text at once, and then releasing them when you move on.

You can quickly navigate within a long session of text by clicking on the “Navigate through Scrivenings” button, located in the right-hand side group of buttons in the editor header bar, and marked as (a) in [Figure 4.13](#). This will reveal a table of contents for the current Scrivenings session. Click on the section you wish to edit, then anywhere else to dismiss the contents.

For more information on how to best take advantage of this editing mode, see [Editing Multiple Documents with Scrivenings \(section 15.5\)](#).

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## 4.3 Dark Mode



**Figure 4.14** Scrivener project window in light and dark appearance.

**<macOS 10.14+>** On systems running macOS “Mojave” and greater, Scrivener offers a full Dark Mode experience. Like most software, it will select an appropri-

ate look depending on your choice of Dark or Light Mode, in the System Settings: Appearance pane.<sup>1</sup>

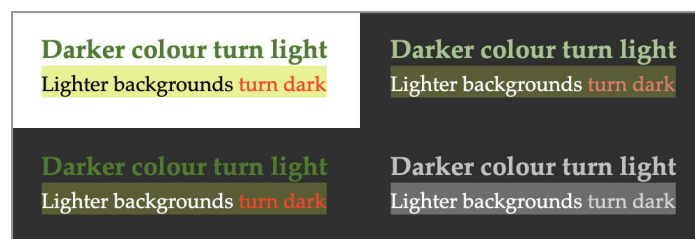
To achieve two fundamentally different appearances, most of the colour settings in the Appearance settings pane now store Dark and Light mode colours separately. While you are in Dark Mode, changing the background colour for the main binder sidebar will have no impact on how the binder looks in Light Mode, to give one example. Saving colour sets as Themes ([subsection B.1.1](#)) now saves those themes according to the light mode they were saved under. And just as with Light Mode, nearly every aspect of the Dark Mode interface can be changed.

### Going Against the Flow

In keeping with Scrivener’s philosophy of giving you a flexible working environment, you can override your system settings to display Scrivener in Dark or Light Mode at all times, with the **Scrivener ▶ Appearance ▶** sub-menu.

## 4.3.1 How Colour Works in the Editors

When in Dark Mode, Scrivener will automatically filter the colours you make use of in the main text editors, with the goal of keeping text within a range that remains easy to read on a dark background. When you use any tool for setting colour in the editor, your choice will set how that colour appears when using *Light Mode*—or what some may refer to as the “true” colour, since that is what you will get when you print—not Dark Mode. If you intend to primarily use Dark Mode and have no interest in what an inline annotation looks like when printed, then you may be happier changing how colour is handled in the editor.



**Figure 4.15** From left to right: natural lighting, filtered for dark backgrounds, direct colour pass-thru and lastly, full monochromatic override.

Colour handling can be adjusted in the Appearance: Main Editor: Colors set-

<sup>1</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.

tings pane ([section B.5.8](#)), with the **Text** setting.<sup>2</sup> Beneath the colour swatch where the text override is set, you can choose from three modes ([Figure 4.15](#)):

- *Desaturate custom colors*: the default setting, and demonstrated in the top-right sample. This provides you with an overall sense of how you use colour in Light Mode, without causing bad interactions between colours that are difficult to read. Filtering impacts *all* use of colour in the editor, including those coming from inline annotations, inspector comments, style backgrounds and so forth.
- *Show colored text as-is*: in the lower left sample, is for those that intend to work exclusively in dark mode. The setting gives you direct control when changing colours in the editor, rather than having your choice filtered, based on how it will look in a different appearance mode.
- *Override all colors*: in the lower right sample, this cuts on screen visual noise to a minimum by removing all colour from the editor. Colour will be indicated by varying shades of lightness and darkness alone.

## 4.3.2 Keeping Text Editing Light

The first time you open a project in Dark Mode, you will be asked whether you prefer dark or light editors in the main project window. This setting will only impact the two main text editor splits, and their respective copyholders. All other areas capable of displaying text, such as Quick Reference panels and various inspector panes, will remain dark.

Whether you prefer to keep the editors light so that you can view the original design of the text as it will print, or merely as a preference, you are not stuck with your initial choice. At any time you can toggle editor lightness with the **Scrivener ▶ Appearance ▶ Keep Main Editors Light** (⇧⌘⌘L) command.

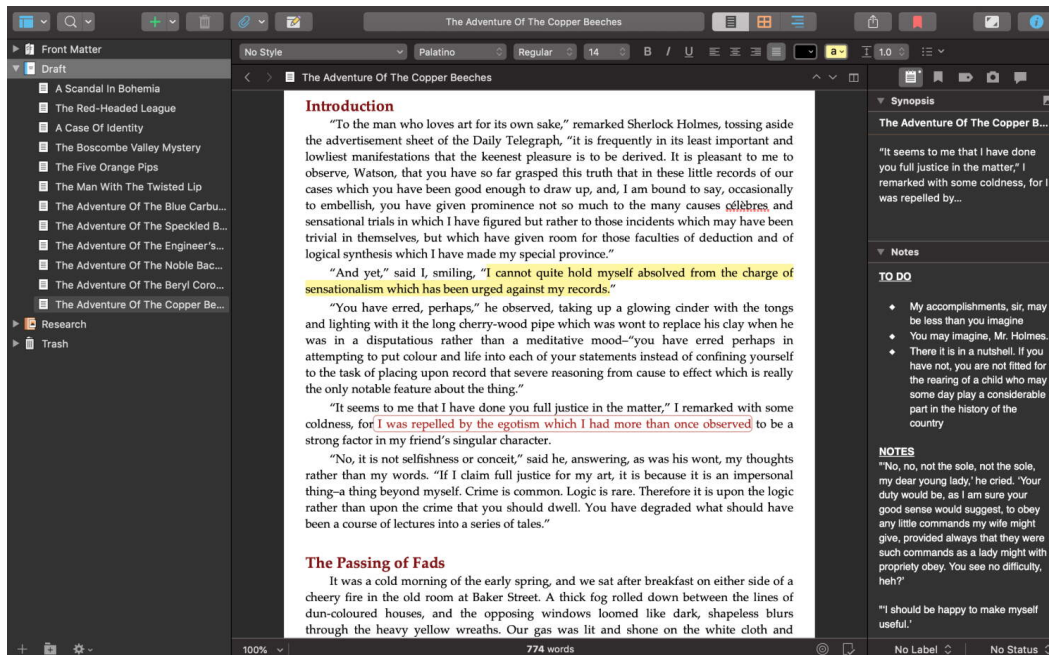
When editors are operating in Light Mode (as shown in [Figure 4.16](#)), all of their Appearance settings will be taken from the way the software appears in Light Mode. As a convenience, a select portion of these settings will be made available to you in the Appearance: Light Editors settings pane ([subsection B.5.17](#)), so you needn't switch back to Light Mode merely to tweak the background colour of your editor slightly.

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<sup>2</sup> These options are also available to the Composition Mode portion of the Appearance settings pane.





**Figure 4.16** Retaining natural colouring in the main editors can be useful for some workflows.

## 4.4 Keyboard & Trackpad

Now that we’ve covered most of what you’ll encounter on the screen, let’s turn to a part of the interface we don’t often think as much about: what goes on beneath our fingertips. If you’re using a regular old keyboard and mouse, then chances are Scrivener won’t be throwing any surprises at you—though in general it might be good to know that we put a lot of effort into making Scrivener a keyboard friendly program. It comes packed with hundreds of shortcuts out of the box, and is designed so that you can move throughout the entire project window interface without even lifting your fingers off of the keyboard. If that’s not your thing, no worries, we put a lot of effort into make the mouse useful, too!

Beyond that, there are a few special pieces of hardware that Apple provides with some models of the Mac, and we do our best to support these where we can.

### 4.4.1 Trackpad Gestures

Scrivener supports two of Apple’s built-in gestures, if you have the hardware to support them and default System Settings:

**Force Touch** A force click on any word will bring up Apple’s “Look Up” interface, including quick access to dictionary definitions.

**Pinch Zoom** When viewing PDFs or images, you can use the pinch zoom gesture to adjust the magnification of editor for that particular document.

## 4.4.2 Touch Bar

When using Apple’s Touch Bar hardware, Scrivener will provide a number of useful functions depending on what you are currently doing within the software, or what we will refer to here as “contexts”.

Some buttons will be available in all contexts, and can be thought of as being global in that sense. Depending on what you are doing with the software, you may find more specific buttons listed per context that provide access to functions that only make sense within that area of the software, like the Style button in the text editor. If you want a quick “cheat sheet” on what the buttons are called, simply use the **View ▶ Customize Touch Bar...** command to look up the button labels.

The Touch Bar for Scrivener is customisable both at the global and contextual level. Global buttons can be added or removed from any view within the software that supports special touch bar features, and the changes made to global buttons will—you guessed it—be global.

To modify how the Touch Bar works for one area of the interface, such as the binder, first click into that area of the window to activate the bar and then use the **View ▶ Customize Touch Bar...** menu command. This will open the standard interface for dragging buttons in and out of the Touch Bar; if you require further instructions on how to do so, please consult Apple’s documentation on the matter.

### Global Buttons

Adding or removing these buttons from *any* context will impact all contexts collectively.



**Figure 4.17** Global buttons: Layout, Project Search and Add.

- **Layout:** quick access to toggling the visibility of the binder, collection list and inspector. This feature also has a three-way control for changing how the editor views should be split ([Figure 4.19](#)).
- **Project Search:** moves the cursor to the project search field above the binder, or if applicable, cancels the current search and closes the search result list.
- **Add:** located on the far right by default, this button provides a convenient way to add new items to your binder, or the view you are currently working within ([Figure 4.18](#)). After generic files and folders, any available document template files from the project will be listed, followed by found shared document templates. Refer to Document Templates ([section 7.5](#)) for more information on these features.





**Figure 4.18** Add Buttons: files, folders and example project and shared templates.



**Figure 4.19** Layout options: Binder, Collection List, Split Horizontal, Vertical, None and Inspector.

### Lose a Button?

Given how some buttons are shown in all contexts, if you add too many additional buttons to the Touch Bar, you might run into cases where there was no space left to show all of the buttons you requested. In this case, the software will have no resort but to remove a button or two for you.

## Binder Sidebar

The binder, along with the other various views that can occupy the left sidebar, have a few special buttons available. The binder button set itself cannot be customised, though additional global buttons can be added while using this context.



**Figure 4.20** Binder: Collections, Labels, Status and Search Result Sorting.

- **Collections:** quickly select between the different available binder views. By default this will consist of the binder itself and the most recent search results you’ve gathered, but it will include any collection lists you add to the project too; colour-coded, naturally!
- **Labels:** brings up a list of available labels in the project for assignment to all selected items in the sidebar. Displays the colour of the currently active label colour, or a dotted circle (as shown) when none is applied.
- **Status:** as with the label button, used to set the status indicator for selected binder items.
- **Icon:** select a custom icon for the currently selected items, or tap “Default” to set them back to the default binder icons.
- **Sort:** the final button only appears when viewing a search result or search collection list in the sidebar. You may sort the list by binder order (default), the titles of items or their creation dates, and invert the current sort order.

## Corkboard Buttons

This bar also has the Icon, Labels and Status buttons available to it.

   Corkboard: Selection Affects, Open, Corkboard Layout

- **Selection Affects:** causes the active selection in this group view to be automatically opened in the opposing split view or attached copyholder (just like how the binder works). If you have both a copyholder and a split view then this button will rotate between targeting the two options and no auto-load. Refer to Linking Splits Together ([subsection 12.2.5](#)) for further information.
- **Open:** simply opens the selected documents within the current editor view, in the same fashion that using the `⌘O` shortcut would do.
- **Corkboard Layout:** the choices presented behind this button will depend upon the state the corkboard is in, and correlate with the options that are provided in a similar control found in the footer bar beneath the corkboard on the right-hand side. The Arrange by Label ([subsection 8.2.5](#)) button is available in all corkboard contexts.
  - Freeform and standard corkboard views simply provide the ability to toggle between these two types, with the currently active mode being the highlighted button. ([Figure 4.21](#))
  - When viewing a stack of corkboards, a selection of groups, there will be three layout options provided as described in Stacked Corkboards ([subsection 8.2.8](#)): Grid, Horizontal and Vertical stacking.
  - In Label View, the choices will be between default horizontal alignment and vertical ([Figure 4.22](#)).



**Figure 4.21** Corkboard Layout: Standard, Freeform and Label View toggles.



**Figure 4.22** Corkboard Orientation: Grid, Horizontal and Vertical.

## Outliner Buttons

This bar also has the Icon, Labels and Status buttons from the binder view, as well as the Open and Select Affects buttons from the corkboard view, above.

The outliner bar otherwise only contains one unique button, the **Hide|Show Synopsis** toggle. This button correlates with the option found in the footer bar of the outliner and simply toggles whether or not synopses will be displayed beneath the title line ([subsection 8.3.5](#)).

## Text Editing Buttons

As you might expect, the text editing areas of Scrivener are where most of the Touch Bar buttons dwell. Additionally, you will be provided with five separately configurable bars for different areas of the software:

1. Document notes in the inspector.
2. Comments and footnotes in the inspector.
3. When editing the contents of a table in the main editors.
4. Editing rich text in the scratchpad.
5. And finally of course the main text content itself, which can be accessed through the main editors, the bookmarks inspector pane, quick reference panels and copyholders.

We will first look over the default set provided to the main content text (other areas start simpler and may provide a limited set of buttons depending on what features they support), and then go over the optional buttons that you can swap in or add as you wish.



**Figure 4.23** Editor Defaults: Styles/Scriptwriting, Highlighter, Lists, Quick Reference

- **Styles/Scriptwriting:** the first button will use one of two modes, depending on whether the editor is currently in scriptwriting or standard editing mode.
  - *Scriptwriting:* a list of scriptwriting elements available in the project settings will be displayed when tapping the button.
  - *Standard:* a list of project styles will be displayed instead.

In both cases, the current element/style under the cursor will be printed in the button. For styles this can include compound declarations, such as “Block Quote+Emphasis”, for emphasised text within a block quote.

Both scriptwriting elements and styles (whichever is currently applicable) can also be accessed with the **⇧⌘Y** shortcut.

- **Highlight:** quickly highlight text with a chosen colour from the colour chooser bar that will appear when tapping on this button. The current highlight colour will be selected in this bar. You can strip out highlights by tapping on the first button (below).



Figure 4.24 Remove colour from text.

- **Lists:** select from a convenient list of common bullet and enumeration types, for creating lists in your document. For custom options, tap the “...” button at the end, and for further choices use the main list tool in the Format Bar (subsection 15.7.2) or **Format** ▶ **Lists** ▶ submenu.
- **Quick Reference:** whenever this button appears in the Touch Bar, you can use it to open the current selection or current text file that you are editing as a Quick Reference panel (section 12.6). Very useful for those “hold that thought” moments.

Now for those options! Everyone works differently and while our set was chosen primarily to increase the accessibility of a few features that are otherwise out of the way, you might prefer a different function in place of them. The following list will describe each button in order from left to right in Figure 4.25. Again, not every button listed here is available in every text editing context. If you don’t see a button listed, chances are that means the editor itself does not support that type of formatting (such as adjusting the line-height of some footnote text).

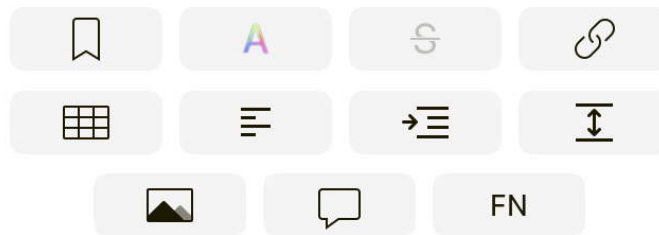


Figure 4.25 Optional buttons available to the text editing context. (Combined bold/italic/underline control not shown.)

- **Bookmark:** toggles whether or not the current document is a project bookmark (section 10.3). The button will fill in when the document is a bookmark, and become hollow otherwise.
- **Text Colour:** similar to the default Highlight button, only for changing the colour of text or removing colour from text. Also accessible with the ⌘⌘C shortcut.

- **Strikethrough**: toggle whether or not the selected text is struck out. Useful if you wish to mark text for removal without deleting it (or to simply keep a to-do list in Scrivener).
- **Add Link**: add a hyperlink to the text, either attached to the selected text, or by inserting the URL at the cursor position ([subsection 15.7.3](#)). Also accessible with the **⌘K** shortcut.
- **Table**: brings up the table editing palette and creates a new table if the cursor is not already within one.
- **Text Alignment**: accesses the four basic paragraph alignment options, otherwise serviced by the shortcuts in the **Format ▶ Paragraph ▶** submenu, and on the main Format Bar ([subsection 15.7.2](#)).
- **Indents**: opens up controls for impacting three different indent characteristics on the selected text with a pair of buttons for each type ([Figure 4.26](#)). The left button decreases the amount of indent, or move the indent point left while the right button increases, or moves the indent point right, as detailed in the **Format ▶ Paragraph ▶ Increase/Decrease Indents ▶** submenu ([section A.10](#)).
  - **Block indent**: all indent levels in the paragraph are moved right or left uniformly, or together. However reducing the indent repeatedly will “flatten” all indents and eventually cause the paragraph to be flush left.
  - **First line indent**: only the first line the paragraph has its indent increased or decreased.
  - **Hanging indent**: the main body of the paragraph has its indent increased or decreased.
- **Line Height**: select between a few common line-height factors (1.0, 1.2, 1.5 and 2.0) or open the main **Format ▶ Paragraph ▶ Line and Paragraph Spacing...** tool, with the “Choose” button.
- **Insert Image**: brings up the file dialogue chooser, where you can select an image that will be inserted at the current cursor location.
- **Add Comment**: adds a comment to the selected text, otherwise available via the **⌘⌘\*** shortcut.
- **Add Footnote**: adds a footnote to the selected text, otherwise available via the **⌘8** shortcut.
- **Format** (not shown): this combo button contains basic commands for Bold, Italics and Underscore along with Strikethrough.



**Figure 4.26** Indent buttons: block indent, first-line indent and hanging indent by pairs.

## Table Editing Buttons

When the cursor is within a table in the editor, the Touch Bar takes on a discrete context from the text editor itself, with table adjustment tools and a few editing buttons by default. This bar can be customised separately from the editor touch bar to hold any of the buttons from the editor that you desire.

In addition to the **Table** button itself (described before), there are two provided buttons ([Figure 4.27](#)) for modifying tables:



**Figure 4.27** Tables: Insert rows and columns.

- **Insert Row:** adds a new row to the table below the current row that the cursor or selection is currently within. Note that when you are editing the last cell of a table, it is not necessary to create a new row, you can simply hit **Tab** to create a new row and move to the first cell within it.
- **Insert Column:** insert a new column to the right of the one the cursor is currently within.

## Inspector Buttons

The last major area of the interface to cover is the inspector (which also pertains to the inspector split in quick reference panels, and the floating inspector in composition mode). Just as the inspector does more than a few tricks, its Touch Bar support varies depending on what you are doing within it.

With the exception of the few text editing areas, touch bar buttons in the inspector are not directly customisable, but you can still access customisation to manage the global button set ([section 4.4.2](#)).



**Figure 4.28** Inspector Buttons: show text synopsis, edit bookmark, select comment colour.

- When editing rich text content within **Document Notes** or when working with text content in the **Bookmark Preview** area, the standard text editing touch bar will be used (although document notes will use its own separately customisable bar).

- **Notes Pane:** a single button is provided to toggle between showing the synopsis as text or an image. The button for toggling to an image resembles the insert image button on the main text editing touch bar ([Figure 4.25](#)), while the button to toggle back to text mode looks like an index card.
- **Bookmarks Pane:** the bookmark list area provides two buttons, one which simply loads the select bookmarks as Quick Reference panes, using the button already provided in the text editor default set ([Figure 4.23](#)), while the second edits the bookmark.
  - Editing an internal reference merely opens the bookmarked document's title for renaming. It is synonymous with hitting the **Esc** key.
  - The button is more interesting when editing an external bookmark, where it then provides access to both the description and stored URL, otherwise accessible through the right-click contextual menu.
- **Snapshot Pane:** the buttons provided while viewing snapshots merely mimic the buttons provided in the interface, but largely only accessible through use of the mouse. As the buttons are all self-explanatory, refer to the documentation on the Snapshots Tab ([section 13.6](#)) for more information on their usage.
- **Comments & Footnotes Pane:** when editing the contents of a note, a simplified text editing touch bar is used. Otherwise, selected comments may have their colours changed with the provided button for doing so.

## Compile Related Buttons

Lastly, the compile window has a few buttons to help you manage your compile settings more easily.

- **Assign Section Layouts:** corresponds to the button along the bottom of the layout preview area. Use this to change the look and feel of your document when it compiles.
- **Close:** simply closes the compile window without saving any of your settings.
- **Reset:** use this if you don't like where things have gone in this session, and wish to restore your settings to how they were when you first opened the compile window. This corresponds to a button on the compile pane that you can reveal by holding down the **Option** key.
- **Save & Close:** for when you want to make a small change to how the project compiles, such as adding a Replacement, *without* actually compiling. This corresponds to a button on the compile pane that you can reveal by holding down the **Option** key.

- **Compile:** when it's time to get down to brass tacks, this is your button.

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## 4.5 Interface Language & Localisation

If you have your computer set up to display itself in a particular language already, you may already see Scrivener in translated form. The default setting is “System Default” which should track whatever language your computer is set to.

To manually switch the language used by the software in menus, buttons and throughout the rest of the interface:

1. Open the Settings pane (**Scrivener** ▶ **Settings...**).
2. In the “General” tab, click on the “Language” option in the sidebar.
3. Select your chosen language from the dropdown tool.
4. Restart the software.

Supported languages are:

- Chinese (Mandarin)
- French
- German
- Italian
- Japanese
- Korean
- Portuguese (Brazilian)
- Spanish
- Swedish

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# **All About Projects**



## In This Section...

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Don't worry, we won't attempt to go into every facet of what can be *in* a project in this chapter, you could safely say that's the rest of the manual! Instead we will focus on the project itself, as the largest unit of measurement in Scrivener; a container for the text you write and the material you accumulate to support your writings. As a citizen of the folders and files on the computer you write with, a project is the most important first thing to learn how to work with. It represents the filing cabinet that your work will be filling. Knowing where it is and how to get it open is the first step to getting all of that paper off of your desk and neatly sorted. So let's dig in!

## 5.1 The Basics of Using Projects

Scrivener is a project based application, meaning you can create separate storage containers to organise your different interests into. These projects are stored on the computer in the folder you designated upon creating them. In this way it is quite similar to any program that loads and saves files to your disk—rather than a database style program (like Evernote or OneNote) where all of your information is managed behind the scenes or maybe even online. These projects will be saved into your Documents folder by default, though you can choose to organise them however you like, even after you've created them, again like you'd organise your DOCX files or PDFs into folders.

### Know Where Your Work is Saved

Some find it convenient to rely upon the **File ▶ Recent Projects ▶** submenu to organise their projects, or simply let Scrivener maintain which projects are open whenever they start Scrivener for the day. These tools are valuable, but shouldn't be a substitute for good organisation on your computer. External adjustments to the system or reinstallation can sometimes cause Scrivener to lose track of projects, and you will want to know where your work lives so you can get it back on these lists.

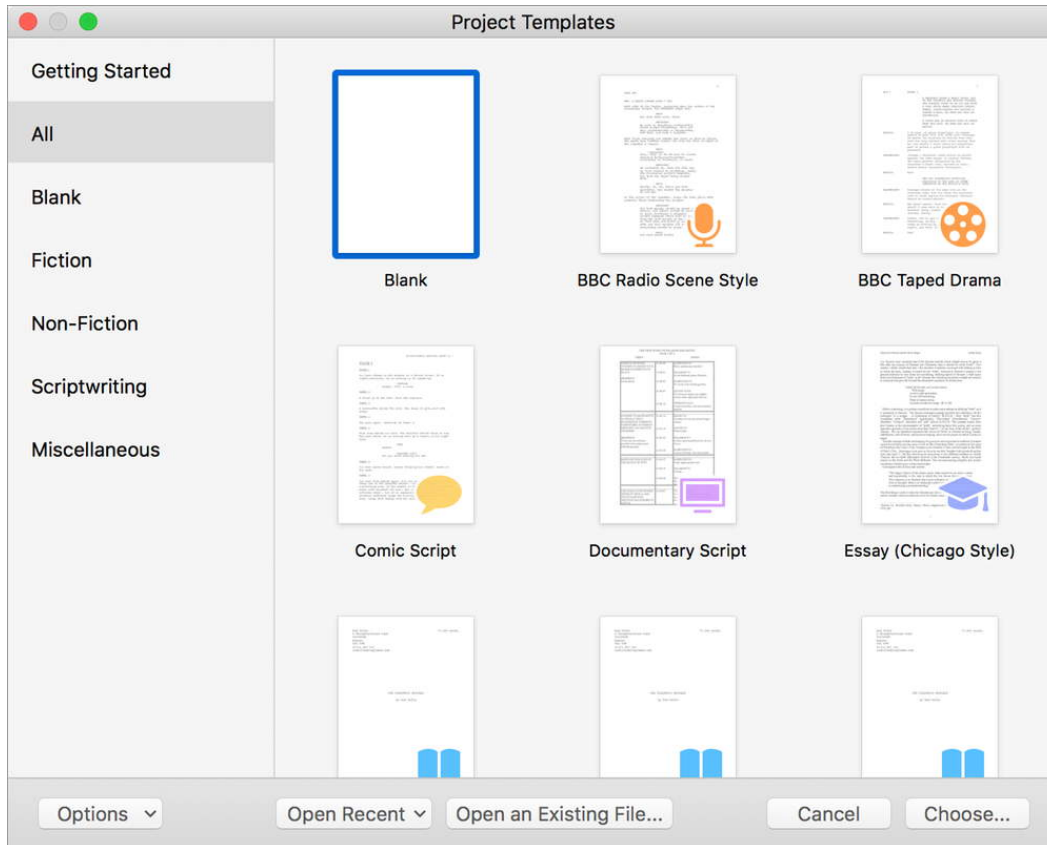
The intended use of a project is to store everything relating to a single major work, whether it be your next novel, a screenplay for a film, a doctoral dissertation or a serial collection of articles for a magazine. This is a general guideline that can be approached in a flexible manner. It is possible to use a project as a daily journal or maybe a collection of random things you intend to one day utilise in future projects. Ultimately, the choice is up to you; a project can be as large or small as it needs to be.

These alternatives will be explored in more detail later on, but you should know early in the process that if you feel you would benefit from having shared research and notes for multiple real-world projects, you won't be penalised for doing so, and in fact the software works great under that approach. Also you should know that merging and splitting projects is fairly painless, so even if you change your mind later on, it won't be a major setback.

To get a little technical, on the disk a project is a cohesive folder of files, which will appear as a single bundled package on a Mac, containing all of the pieces that make up your project, all using industry standard formats to do so. The accessibility of this format is meant to be used as a last resort safeguard, not as a way to allow you to edit a project in places where Scrivener is not available. **Project damage and data loss can occur from attempting to edit the internal files by hand.**

### 5.1.1 Creating a New Project

When you first start Scrivener, you will be presented with a Project Templates window (Figure 5.1), which also includes a handy “Getting Started” section in the left sidebar.<sup>1</sup> In addition to providing an easy selection mechanism for new projects based on templates, you can also start from scratch with “Blank”, or open existing projects from your disk with the buttons along the bottom. To call up this window later on, use the **File ▶ New Project...** menu command, or use the shortcut: **⌘⌘N**.



**Figure 5.1** The Project Templates window is where you will start when making a new project.

Along the left side of the window are template categories. A number of useful templates have been provided, and any templates you create or import into the software will be organised into these categories as well. To read more about creating and managing templates, see Project Templates (section 5.4).

To create a new project:

1. Click on the desired template tile to make it active, or select the “Blank”

<sup>1</sup> You may hide this category (or choose to reveal it again) using the **Options** button in the lower left of this window.

template to start with a fresh project that can be constructed to your needs.

2. Click the **Choose...** button (you can also just double-click on the template icon).
3. Enter the name of your project in the “Save As” field. This is what you will use to identify your project in the future. It can be changed later (using your file manager while the project is closed) if you please, so don’t worry if your work in progress doesn’t have a name yet!
4. The next step is selecting *where* you would like to save the project file. It is a good idea to choose a place on your disk that you will remember.
5. The **Create** button will activate once you have supplied a name and valid save location. Click this button to proceed, and in a few seconds you’ll have a brand new project open, ready for writing!

### 5.1.2 Saving and Making Copies

As with many modern programs, your projects automatically save the work you do in them on as you go. By default, this means that after two seconds of inactivity, the project will be fully saved. You can monitor this process by watching the upper-left corner of the window. The left-most “traffic light” button will have a dot inside of it whenever the project contains pending edits that need to be saved to the disk. When you stop typing or clicking in the program for a moment the mark will disappear and now everything is saved to the disk.

You can change how rapidly this happens by adjusting the inactivity interval in the General: Saving settings pane. If you have selected a very long interval for some reason, you might wish to manually save the project now and then. This can be done with the standard **File ▶ Save** command, or pressing **⌘S**. But in most cases it will not be necessary to manually save like this.

Occasionally you might need to create a copy of the project you are working on. This can be a useful tool when you wish to experiment with a series of radical structural changes. To create a new separate copy of the project and continue working in the *new* copy:

1. Use the **File ▶ Save As...** menu command (**⇧⌘S**), and choose a new name for the project.
2. Type in the name of the new copy for this project and select a folder to save it in (or use the same folder if you wish).
3. Click the **Save** button.

At this point the active project will become the new one you just created, and the old copy will be closed in the background.

If instead you merely wish to create a backup, or a maybe leave a trail of major milestones rather than switching projects, read about creating backups on the

fly ([subsection 5.2.2](#)). It is also recommended you use this method when creating copies of the project with the intention of storing or sharing them over the 'net ([section 5.3.1](#)).

Since Scrivener projects are stored right on your disk, you can use the Finder to manage them, create duplicates, and archive old versions. **Always be sure to close your projects before doing so.**

### 5.1.3 Opening Existing Projects

Existing projects can be opened in a variety of ways. For convenience, your Mac keeps track of the last several projects you have opened, and stores them in a list, accessible from **File ▶ Recent Projects...** This list can also be accessed from the Project Template window, via the **Open Recent** button along the bottom.

Secondly, by default Scrivener will remember any projects you leave open when you quit, and will re-open these for you next time you start the software. This behaviour can be changed in the General: Startup settings pane.

You can also open older projects that are no longer in any convenience lists using **File ▶ Open... (⌘O)**, or click the **Open an Existing Project...** button in the Project Templates window, and navigating to the project manually with the file dialogue box.

#### Can I Keep My Own List of Projects?

There may be projects you would like to “pin” in such a way that they are always conveniently available from within the software. Refer to Setting Favourite Projects ([subsection 5.1.4](#)), in the following section.

### Finding and Managing Projects as Files

Finally, as with managing projects that have been saved, you can also use the Dock, Finder, Spotlight, or other system tools to open files stored on your drive. In Finder, double-click the project you wish to open. Spotlight is also handy when a project gets misplaced and you are unsure of where it is saved.

If you don't recall the name of the project or where you saved it, you can search for “kind:Scrivener Project” to find every Scrivener project in your Spotlight index. If you're using the direct-sale version, we have created a convenience menu command for you: **File ▶ Find All Projects in Spotlight**.

When trying to sort out the differences between near similar versions of a project, you will find that the Quick Look information for your projects is quite extensive. A stylised outline of the “Draft” folder will be presented to you, which provides a small amount of information per outline item using a similar set of rules as those described in Titles and Adaptive Naming ([section 7.2](#)). Use this ability to figure out which project is the correct version, before opening it.

### 5.1.4 Setting Favourite Projects

For those projects you would like to always keep track of, no matter how infrequently you may use them, you can “pin” a project to the main **File** menu:

1. Open the project you want to set as a favourite.
2. Use the **File ▶ Add Project to Favorites** menu command.

The project will now be tracked (even if you change the name of it or move it to another location) and listed in the **File ▶ Favorite Projects ▶** submenu. To stop tracking a project:

1. Open the project you wish to stop tracking as a favourite.
2. Use the **File ▶ Remove Project from Favorites** menu command.

Given the nature of how Scrivener tracks a project on your machine, these lists cannot be transferred between Macs or PCs, so you will need to make this setting on each device you use.

If a project can no longer be found, it will be automatically removed from the list of favourites for you.

### 5.1.5 Moving and Deleting Projects

Despite technically being folders full of files, you can otherwise treat the project as you would any other file on your system. Everything that Scrivener needs to work with the project is contained within the project file, and so moving it will have no detrimental effect on it. This also makes it easy to copy all of the work you need from one machine to another, since all of your research and working material is self-contained in the project.<sup>2</sup>

**Always close a project prior to moving it.** While a project is open, Scrivener maintains a very close connection with the files inside of it. Since it cannot predict where you will move the project the software may no longer save files in the correct location, and can lead to lost work or needing to manually put the project back together again.

You will want to be aware of this “package” format when using Internet services to copy the file, attaching it to an email, or in essence doing anything with it that involves non-Mac technology. It is often best to zip the project into a single archive file prior to using non-Mac technology to transfer the project.

As with all file based programs, it is not possible to delete old and unwanted projects from within Scrivener. To remove projects you no longer want, use the

---

<sup>2</sup> There are some exceptions if you choose to link to research material, use linked images and other such things along those lines, but these are more advanced uses of Scrivener and it is assumed you will know what you are doing if you use links.

standard file management tools as you would with other folders and files on your computer.

### 5.1.6 Project Format Upgrades

If you've used Scrivener in the past, it is very likely you will need to upgrade older projects to the new format used by 3.0. Beyond that, from time to time we may need to modify the format to add or change features. By and large this should be a painless procedure, and we take steps to ensure it is a safe one as well.

When opening an older project you will be asked if you wish to update the project. It is safe to cancel, your project will not be touched by this version of Scrivener and it will stop loading it. In most cases you will want to update it by clicking the **Update Project** button.

#### **Coffee Break Alert**

Larger projects may take some time to update. A complete copy of the entire project will be created before the updating process is started, so for projects that measure in the gigabytes, it may take a long time for the full process to complete. It is strongly encouraged that you let the process complete fully, rather than interrupting it. If you are in the middle of a busy schedule or coming up on a hard deadline, it might be best to defer upgrading Scrivener until you have time to devote to the process. For *very* large projects, such as those over several dozen gigabytes, you might want to contact tech support for assistance in getting the project upgraded without taking hours to do so.

The first action that will be taken is to create a complete backup of the project in its current state in the same folder where the project is presently located. If you have a project called "My Thesis.scriv" in your Documents folder, then a backup project called "My Thesis Backup.scriv" will be placed in your Documents folder prior to attempting the upgrade. This is your first layer of protection as that copy will be precisely the same as it was before starting the upgrade.

Next, your project will be updated to the new format. At the conclusion of the process, the project will open.

If for some reason the project did not update correctly or open at the conclusion of the process, the backup created earlier will be handy to restore from. Again using our example from above, set aside or delete the "My Thesis.scriv" project and rename "My Thesis Backup.scriv" to how it should be, then try again. If you have repeated difficulty updating the project, please [contact technical support](#).



**Upgrading from Scrivener 2**

If you've been using the iOS version with your 2.x projects, you might be wondering if it will work with the new format seamlessly. The answer is yes! The iOS version was programmed from the very start to work with 3.0 projects, and has been capable of working with them from its inception. In fact you might find a few new features unlocked in iOS for you once you upgrade to 3.0, such as making use of a project's styles and tracking your daily writing progress with the writing history feature.

Projects will not open in older versions of the software for either platform. Make sure to update all of your machines to these versions or greater, and make sure that your colleagues are up to date as well if you collaborate by sharing a project.

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## 5.2 Backing Up Your Work

Regularly backing up your work is an important part of the writing process in that it keeps your efforts safe, and while there are many external strategies for keeping your work safe from catastrophes and mistakes, the most important part is remembering to do it.

### 5.2.1 Configuring Automated Backups

Fortunately, by default, Scrivener will protect your work from basic mistakes (like accidentally trashing an entire chapter, or using a global search and replace tool to change all instances of “the” to “catastrophe”). The default rules are as follows:

- The project will be backed up whenever the project is closed.
- The backups will be stored in your user folder:  
`~/Library/Application Support/Scrivener/Backups`  
 For those using the Mac App Store version, you will need to set up a backup folder yourself, as the software cannot do so automatically.
- They will be zip compressed to save space and protect the internal files from external utilities.
- Backups will be rotated (old ones deleted) to keep no more than 5 backups per project

The location, along with several other settings, can be changed in the Backup settings pane ([section B.9](#)).

It is important to note that the backup system, as it ships by default, is set up with a common method of working in mind, whereby you close your project on a regular basis (say at the end of every day). If you find your own work habits deviate from that, you would do well to go over the settings in the Backup tab to suit your style of working. Here are a few common variations:

- Those who leave their projects open for weeks or even months at a time, will most certainly want to change the backup settings to be triggered by manual saves, and remember to run a manual save (**⌘ S**) at least once a day for maximum protection.
- On the other hand, if you open and close projects multiple times a day, you might find the default limit of only five copies too limiting. Mistakes you'd like to revert may have rolled off the backup list because five backups were created in the past 24 hours. Increasing the number of stored backups to a higher value means more drive space will be used for each project, but will ensure you have something from more than a few sessions ago to restore from.
- Read about the various options available ([section B.9](#)).

### Working in a Secured Environment

In cases where security is a concern (if you are working with confidential files in a protected area for example) the automated backup system might present a security risk if it produces files in an unencrypted area of your hard drive. If you are working in an encrypted environment, make sure the backup location is set to also output to that area. You can also set individual projects to back themselves up to a custom location in Project Settings ([section C.9](#)).

## 5.2.2 Manually Backing Up

Backups can be created whenever and wherever you want. Use **File ▶ Back Up ▶ Back Up To...** and select a backup location and filename. The “Backup as ZIP file” option in the file dialogue will compress the backup project into a zip file after saving it, and is thus useful when backing up to remote storage locations, such as a file server or through cloud sync, or to attach the project to an email. By default, backup file names will be timestamped, making it easy to find a precise version later on and reducing confusion over which version of the project is the most up to date. Use of this command is separate from the automatic backup system and will not influence it in any way.

It is also possible to manually trigger the automatic backup system, even for projects which have been excluded from it, by using **File ▶ Back Up ▶ Back Up Now** command (hold down the **Option** key to back up *all* open projects with the

**File ▶ Back Up ▶ Back Up All Projects Now** command). This will follow any relevant options that have been set in the Backup Settings, such as how many to keep and where to store them. Do be aware that since automatic *and* manual backups rotate the oldest versions out, frequent use of this command can roll older backups off faster than you would like; consider increasing how many old backups Scrivener keeps.

Frequent use of these features will help safeguard your work in progress, and it is recommended that you start forming a habit of making backups whenever a decent amount of work has been committed to the project. Anyone who has lost a lot of work to a hard drive failure or catastrophic event can tell you the most important thing to getting work done is making sure your work backed up.

### 5.2.3 Restoring from Backups

And the second most important thing is knowing how to get your work restored from your backups! In the unfortunate event that a backup is needed to fix a problem with your current working project, you can make use of Scrivener's automatic backups to restore from an earlier version. By default these backups will be tucked away in a safe out-of-the-way place, to help avoid them being inadvertently opened and modified.

If you are unsure of where your backups are located:<sup>3</sup>

1. Reveal the folder they are stored within by opening the Backup settings pane.

For projects with a custom backup folder set, you will need to use the **Project ▶ Project Settings...** menu command and navigate to the Backup tab from there.

2. Click the **Open backup folder...** button at the bottom of either pane.

Now that you have the backup folder open in your file manager, you will find a number of files named respectively with the projects they relate to. After the project name there will be a sequence number or a date stamp (an optional setting).

---

<sup>3</sup> For backups you have created manually, you will need to use your file manager to navigate to where you saved them and skip over the following checklist.

**What are zip files and how do I use them?**

By default these files will be stored in compressed “zip” format. Zip files are a “container” file format. You can think of container files as being a bit like boxes. You can stuff other things into a box, tape it up and store it in the attic. It takes up less space and protects the things inside the box to a degree, making them easier to move around together.

Just as a cardboard box is not the things you put into it, so long as your project is in a .zip file, it is not a Scrivener project and must be “unpacked” from the box. On most systems, this is as easy as double-clicking the .zip file and either dragging the project folder out of your default zip viewer, or waiting for the project to be extracted automatically in the folder view alongside the original .zip.

With the correct backup folder opened, you are ready to proceed:

1. Locate the most recent backup. The sequence number cannot be used to determine this as Scrivener rotates through numbers. If you have not enabled the date stamp option in Scrivener, you will need to use your file manager to determine the most recent copy.
2. Copy the backup(s) you wish to examine to another folder by holding down the **Option** key while dragging the files to your Desktop or another convenient location. **It is never a good idea to open the original backups, or to work within the backup folder.**<sup>4</sup>
3. For zipped backups, you will need to first open the .zip file in the Finder by double-clicking on it.  
If your backups are not zipped, you will be able to open them directly like normal projects, and then it will be even more important to create copies of the backups to work on.
4. Examine each backup you’ve copied. If the backup contains the problem as well, then proceed to the next older backup, continuing until you find a valid copy.

When you find a good copy to pull from, use one of the following methods to restore your work:

— *Full project restoration:*

---

<sup>4</sup> We want to set aside a complete copy of all current backups for this project; otherwise opening and closing them may rotate (delete) the very backups you’re looking for. Creating a separate static copy of the backups in a folder outside of Scrivener’s reach is the safest way to avoid that problem.

1. If applicable, close the chosen backup project.
  2. Remove the unwanted version of the project from its original folder.
  3. Replace it with the restored copy, renaming it if necessary.
- *Partial restoration:* to restore only *pieces* of a project, you can open your current working version at the same time as the backup, and drag those pieces from the restored backup project into the live working project, from binder to binder ([section 6.3.4](#)), or by copying and pasting the bits of text you want to restore.

This can be a useful approach if you've done a lot of work since the last backup, and have only just noticed that one file had been accidentally messed up some time ago, and there are no snapshots to recover from.<sup>5</sup>

Once you've finished, the backup copies you duplicated can be disposed of or archived into a safe location, just in case.

### 5.2.4 Managing Backups for Large Projects

Very large projects can conflict with what would ordinarily be good settings for the automated backup system. If a project has reached a point where backing it up automatically has become a nuisance, rather than decreasing the amount of backup security globally, consider excluding the large project from the automated system ([section C.9](#)).

Once this project is excluded the backup system will ignore it entirely. It will then be up to you to keep manual backups of the project. The **File ▶ Back Up ▶ Back Up Now** feature is useful in this regard.

### 5.2.5 Tips for Using Time Machine

Time Machine will automatically back up your computer once every hour, and store backups as far back in time as possible, reducing the frequency of these backups the further back in time you go.

This presents a unique problem with Scrivener in that the hourly backup routine is likely to run while you are working in Scrivener. This means that Time Machine will be capturing your project while it is open and in progress. Frequent users of Scrivener may very well keep their projects open for weeks at a time, meaning good backups of their project will be few and far between.

There are a few tips you can use to help Time Machine work effectively with Scrivener:

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<sup>5</sup> Snapshots are a useful feature for protecting your text within the project, and are an additional layer of protection on top of backups. Read more about them in Using Snapshots ([section 15.8](#)).

1. Time Machine can be set to run manually at any time of your choosing, using the menu status icon in the upper-right hand portion of your display. You can thus control when Time Machine makes a backup of your projects, making sure they are closed first.
2. As Time Machine starts to erase hourly backups that are old, it saves only the last backups made in a single day. In conjunction with the first tip, you can make certain that your “safe” backups are retained once Time Machine starts erasing old backups, by always running Time Machine manually at the end of every day with all of your projects closed.
3. Always use Apple’s Time Machine interface to restore projects. That goes for all forms of using Time Machine’s disk storage.

#### **Going the extra mile**

Time Machine is a wonderful tool for what it does, but it shouldn’t be used as your sole backup for two important reasons. First, being attached to your computer at all times, it is thus susceptible to the same risks of damage and loss due to theft or catastrophe. Second, no backup system should be considered infallible, and thus you should have more than one method. Time Machine isn’t perfect; don’t let it be your single safety net.

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## **5.3 Beyond the Basics of Using Projects**

In this section we’ll go over some of the more advanced techniques you might require in certain scenarios. We’ll cover how to best work cross-platform, collaboration, splitting & merging projects and more.

### **5.3.1 Tips for Working with Projects**

#### **Working Cross-Platform**

The Scrivener project format is fully compatible with its companion platforms, whether that be macOS, Windows or iOS.<sup>6</sup> No conversion is necessary, and all platforms can work off of the same source file (at different times; no project should ever be opened more than once simultaneously). The primary difference

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<sup>6</sup> On macOS, only Scrivener version 2.0 and greater is cross-platform compatible. If you intend to use the Windows version as well to edit your projects, you should consider upgrading to the latest version (and besides, Scrivener 1 is very old at the time of this writing, and has not been modified in many years). Additionally for iOS compatibility you will need the project updated to version 2.7+ on macOS or 1.8+ on Windows.

in appearance between Windows and the macOS and iOS platforms is that Windows does not have a “package” or “bundle” format. Thus, the Scrivener project will appear in its ordinary state, a folder. This is invisible to a Mac user, but in fact there is no difference between the two at a file level—it’s purely in how we see and work with that project.

To open a project on the Mac, you need only double-click the “MyProject.scriv” project bundle, or open it from within Scrivener. On Windows this will be a folder, so you will need to descend into the “MyProject.scriv” folder and select (or double-click on) the “MyProject.scrivx” file that you will find at the top level within that folder.

To transfer projects between computers, always make sure to copy the entire “MyProject.scriv” folder from Windows, **not** just the .scrivx file by itself; the entire folder is your project.

## Sharing Projects Over the Internet

If you wish to share a project using the Internet, you might think to attach it as an email, or upload it to a file sharing service so that one can download it or save a copy to an online backup service. Given that a project is a folder of files the best way to send a project is as a single “document”, and the easiest way to do that is to use zip files (or whatever archive format you prefer). This can also prove a reliable way of copying projects to some types of external storage, such as USB thumb drives, if you run into difficulties or slowness copying projects the usual way.

There are numerous tools for creating zip files, including using the operating system itself, but if you’re looking for an easy way to do so from within Scrivener, try using the **File ▶ Back Up ▶ Back Up To...** menu command from within the project you wish to send. Within that dialogue box you will find an option to back up as a zip file. This will “pack” your entire project into a single compressed file which will transfer across the ‘net more quickly and safely.

### Opening zipped projects

Zip files do not load in Scrivener, you will need to “unpack” the project from the zip file before it can be opened. This is usually as simple as double-clicking on the zip file and extracting the contents to your disk somewhere, then loading the project from that location as you normally would. I probably sound like a broken record at this point, but as always, if the project looks like a folder in the archive, make sure to extract the entire folder ending in “.scriv”, not just parts of the folder.

If you later wish to merge edits that have been made to this project by a collaborator or editor, you might be able to make use of the process described in Splitting & Merging Projects ([subsection 5.3.2](#)).



## Project Size Limitations

Since Scrivener was primarily written with the long-form author in mind, much effort has been put into making the project format as robust as possible. It can handle book-length manuscripts with ease, store large quantities of research material, and handle many thousands of individual components, even on a single corkboard. Scrivener has been tested against projects with millions of words in them; way beyond what it would normally have to face. So for ordinary usage, you will never need to worry about limitations.

There is one caveat to keep in mind, however: the bigger your project is on the disk, the longer it will take to produce backups. When combined with the automated backup system, this could mean waiting long periods of time for backups to complete in the most extreme cases. While Scrivener is capable of handling a large amount of media, some users have found it better to use database software in conjunction with Scrivener, when gigabytes of data are involved.

There is no universal rule of thumb on upper limits, this will be whatever you are comfortable with, and how much available storage space you have in order to keep consistent backups. If you have an 8GB project, that means each backup will consume another 8GB maximum (less if you use the slower zip archival option), and will take as long to produce as it would to duplicate 8GB of data on your hard drive.

Another option is to disable automatic backups for the large project. This can be done in each project's backup settings ([section C.9](#)). You can also divert a project's backups to a different folder or disk, if running out of space on your main disk is a concern.

## Sandboxing and Authorised Folders

**<MAS only>** Sandboxing is a technology used by all software sold through Apple's Mac App Store. Sandboxing works by limiting the tasks that applications are allowed to perform. One such limitation is that applications can only access files and directories that the user has granted access using an Open or Save panel.

For the most part you shouldn't notice this restriction. When you open a Scrivener project, in most cases all of the files it needs are contained within that project file and by opening the project you have given Scrivener permission to operate on those files, meaning that you can edit, save and work as usual. Additionally, the files it makes use of as settings, such as templates, custom icons and so forth are located in a "safe" area it has complete access to. However, there are certain types of files that, under sandboxing, Scrivener will not be able to access so easily or in some cases at all:

- *Bookmarks*: Scrivener's inspector can store a list of bookmarks to external files. Because these files are stored outside the project, Scrivener may not be able to open them by default.
- *Aliased research files*: it is possible to import research files as aliases using **File ▶ Import ▶ Research Files as Aliases....** Scrivener won't be able to open



such files after you reload the project, and when you try to open such files in the editor you will see a message telling you that the file cannot be opened.

- *Linked images in text*: when inserting an image into text as a link back to the original file on disk (using **Insert ▶ Image Linked to File...**), if the original images are stored in locations to which sandboxing does not grant Scrivener access by default, these images may not appear correctly in the text, a placeholder being displayed instead.
- *Post-processing and command-line integration*: those who make use of the Mac's broader toolset, integrating Scrivener with command-line tools such as MultiMarkdown, Pandoc, LaTeX and so forth, are advised to not use sandboxed software. If you haven't purchased Scrivener yet, we'd advise doing so directly rather than through Apple, but if you've already bought the program you can [switch to the direct-sale version](#) to lift all of the above limitations.

### How to Grant Scrivener Access to More Files

Fortunately, there's an easy way to grant Scrivener permission to various locations on your computer so that Scrivener can still use all of these files seamlessly. Here's how:

1. Use the **Scrivener ▶ Authorize Folder Access...** menu command to open the directory access panel.
2. To grant Scrivener permission to access external files, simply click on the **Add Folders...** button. This will bring up an Open panel from which you can select the directories you wish Scrivener to have access to. Alternatively, you can drag folders into the "Accessible Folders" list from the Finder.

To stop Scrivener accessing files, select the folders in the list that you no longer wish Scrivener to have access to and click on **Remove Access**.

### Tips for Authorising Folders

When you grant Scrivener permission to access a directory, it will be able to access all of the files inside subdirectories of that folder too. Thus, you need only select the highest level folders that you feel comfortable giving to Scrivener.

The main thing to consider when adding folders to the list is which files you need Scrivener to access. For instance:

- If you tend to import many different files into Scrivener as aliases (using **File ▶ Import ▶ Research Files as Aliases...**), or if you make heavy use of Scrivener's Bookmarks feature to refer to external files, then you may wish to consider adding your entire home folder to the list of accessible folders.

This will give Scrivener access to all folders inside your home folder without you having to add them all separately, such as your Pictures, Movies and Documents folders.

- If you are very careful about where you store all the files on your hard drive, and you only tend to add images to Scrivener as linked files and import a few sound and movie files as aliases, you might only need to add the ~/Pictures, ~/Movies and ~/Music folders to the list.
- Perhaps the safest and easiest approach would simply be to have a folder somewhere on your hard drive for storing your research documents, and only grant Scrivener access to that.

Essentially, though, for any files you want to be able to view in Scrivener that are not stored inside the project, you must grant access to one of the folders containing that file. For instance, suppose you have bookmarked the file “~/Documents/Ideas/Writing/MyGreatIdea.pdf”. For Scrivener to be able to open that file, you must grant access to one of the following folders:

- “~/Documents/Ideas/Writing”: in which case Scrivener will be able to access all files inside the “Writing” folder.
- “~/Documents/Ideas”: in which case Scrivener will be able to access all files in the “Ideas” folder, as well as any folders contained in the “Ideas” folder and any files or folders inside those.
- “~/Documents”: in which case Scrivener will be able to access all files, folders, subfolders and sub-files within the “Documents” folder.
- “~/”: in which case Scrivener will have full access to your home folder. (Adding this is the easiest option if you do not want to have to worry about authorising the right folders every time you add a new file, but it is also the least “secure”.)

### 5.3.2 Splitting & Merging Projects

In this section you will find tools for helping to realise large-scale decisions like merging two or more projects together, or splitting a large one into smaller satellite projects. You will also find tips for merging changes from one project fork into another, as a form of synchronisation, which can come in handy for collaboration or working on the go.

#### Splitting Projects Up

Occasionally, one or more portions of your project might exceed the scope of your original planning and contain portions within them that should become their own projects. A classic example of this might be a chapter in a biography

that ends up becoming another biography about different person entirely, or a short story that keeps growing and starts to become a trilogy of novels.

Whatever your reasons may be, there are fortunately basic procedures for splitting your project. There are two ways of going about it:

1. Create a new project for the pieces that merit moving them out of the parent project. You can use whatever template you wish for this, or even blank, it doesn't matter. With the original project open alongside the new one, position the windows so that you can see both binders at once. Now simply drag and drop the pieces from the old project into the new project's binder. That's it, you're done (you may want to delete the original copy from the old project to truly "split" them). Refer to Copying Files and Folders Between Projects ([section 6.3.4](#)) for the details.
2. Use **File ▶ Save As...** to create a forked copy of the entire project ([subsection 5.1.2](#)). Once you've created a new copy, you will immediately begin working in the new one. Simply delete everything from the binder that isn't necessary for this new project.

The first method might work better if your needs are simple, but if you find important aspects of the project are getting lost in the translation, the second method is by far the safest as it comprises a complete and 100% identical copy of the starting project, from every word you've written into it to its most obscure settings.

## Merging Projects Together

If what you are looking to do is merge two completely different projects into one—like say novel A and novel B are going to be part of a trilogy and you want them together—then use the **File ▶ Import ▶ Scrivener Project...** menu command. If you are asked to "import and merge", it is important to use the **Import Only** button instead.

### Consider Linking Instead of Merging

Scrivener projects can have detailed connective relationships made between them without having to lump everything together into one binder. If you mainly just want to make some research readily available, you might be better off using a link ([subsection 10.1.6](#)) instead of fully copying that material around into your project.

## Merging Changes from One Project into Another

It is possible to merge edits from one project into another, in cases where these two separate projects have come from an original source at some point in the past. For example, if you take a copy of your project with you on a trip using

your laptop and return home, discovering that you'd made a few changes at home before packing up the laptop, you could use this feature to merge the two forks of the project back together again with the **File ▶ Import ▶ Scrivener Project...** menu command.

The following methods for copying a project can all result in versions that can be merged back together in the future:

- Duplication or any form of copying the project on the disk itself. This is always best done while the project is closed, otherwise your collaborator may get a confusing warning about the project appearing open on your machine.
- Use of the **File ▶ Back Up ▶ Back Up To...** command, which is particularly useful if you are handing the project off via email, as you can zip it into a single file here for easy transmission.
- Use of the **File ▶ Save As...** command. Do note this command will move your session to the *new* copy of the project, meaning if you continue working in the new one, the old copy you left behind should be the one you send.

### Effective Use of Project Merge

The following procedure outlines best practices for the use of this feature. Deviating from this procedure should only be done with care:

1. Create a copy of the project using one of the above methods.
2. At this point is safe to work in either or both projects simultaneously. For the best results you will want to avoid editing the same precise binder items while the two copies are “forked”.
3. Once you are ready to merge the projects, open the copy you consider to be the “master” copy, and from it, use the **File ▶ Import ▶ Scrivener Project...** menu command, and select the second project using the file chooser.
4. You will receive a message alerting you to the fact that the imported project appears to be a copy of the current project, and will be offered a choice on how to proceed:
  - Click the **Import and Merge** button to incorporate the edits into the binder.
  - Click the **Import Only** button to import the whole project as its own set of folders into the binder. If the two projects are very similar, this will result in many duplicates, however this can be desirable if the above method did not work as expected or if the two sources have diverged significantly enough that they no longer merge properly.

- And of course, the **Cancel** button will back out of the procedure without modifying the current project.
  - You are strongly advised to leave the **Back up project before merging** option enabled unless you have taken your own precautions!
5. At the conclusion of the process, your binder sidebar will switch to showing a “Merged Documents” list of all the items that were added or modified in the project. Take this opportunity to review the changes in detail. If conflicts occurred, where you both edited the same item independently, you may need to manually merge the result yourself. Once you are finished, you can close this sidebar view (it is actually a collection, so it won’t go anywhere until you delete it or merge again) with the **×** button in the binder sidebar header.

Scrivener does its best to retain as much data as possible from both projects, using the following mechanisms:

- Whenever the main text of a file has been changed by merge, a snapshot will be taken for the older copy of the text.
  - If changes have been made to the same item that involve the synopsis or its document notes in the inspector, then a summary page will be created showing both versions so you can easily copy and paste the correct version into the conflicted item.
  - Metadata changes will be merged, so long as the same binder items are not edited in both forks.
6. The project you merged from will not be altered in any way by these procedures. Once you have confirmed a successful merge, it would in most cases be best to discard that copy or archive it to reduce confusion.

### Just the Facts, Ma’am

Only content found in the binder will be merged. Alterations to a project’s settings, compile format, new keywords, other metadata added, and so forth will be ignored. There is an exception in the case of metadata, in that if a binder item uses a metadata setting, it will be merged. If you need to merge metadata adjustments (such as new custom list fields, labels or keywords), then ensure these values are assigned to some binder item (perhaps creating a disposable item specifically for that purpose). All other important project-level adjustments (including new custom metadata fields) should be communicated in one form or another.

The satellite project can be opened alongside the original, prior to merging, to copy the new metadata settings. Refer to Copying Settings Between Projects ([section C.1](#)) for further information on this topic.

Merging two projects together involves a lot of guesswork, and what a computer thinks is right may not always be what is *really right*—for that I’m afraid we still need humans. The software will do its best to retain as much of both of the projects as possible, but in some cases you may lose information. Having the software create a backup will give you a point to step back to if the merge goes afoul, or if it only made mistakes in a few areas, you can open up the older backup along side the project and manually restore just those pieces you need from its binder.

#### See Also...

- Restoring from Backups ([subsection 5.2.3](#)): when things don’t go as planned, use these instructions to get back to a better starting point.
- Copying Files and Folders Between Projects ([section 6.3.4](#)): it might sometimes be best to only copy a few things rather than perform a full merge, or maybe you only need to restore a portions from a backup. These instructions can help with both cases.
- Using Snapshots ([section 15.8](#)): the project merge feature will take a snapshot of an item whenever the main text of it has been altered by the process. A familiarity with this feature will help resolve problem.
- Saved Layouts ([section 12.3](#)): if you are collaborating with another person, the two of you might have different ideas on how the project should be displayed. Use layouts to save your settings so you can restore your preferred settings whenever you wish.

#### Collaborating with the Import Project Feature

This capability could allow for a limited form of collaboration between two people. If you provide someone with a copy of your project and continue working on it, while they make revisions to the project on their own, you can later on merge their changes back into your project.

It is possible to limit what you send to a collaborator, and have the additions or changes they’ve made merged back into the full project later on. For example you can use the **File ▶ Save As...** command to create their copy and then delete everything from the project except for the chapter or two they intend to work on. When importing and merging their edits later on, only that portion of the binder will be updated.

**Can Projects Be Merged Multiple Times?**

In a word, no. You will always want to create a new merged copy of the project for your collaborator, rather than having them continue to work in their own satellite copy. Otherwise, not only will they lack the benefit of seeing any changes *you* have made to the project, this could ultimately result in strange results as the two copies of the project grow more and more apart from one another. Whenever you merge a collaborator's changes, always provide them with a new updated copy of the project!

This is a simple form of merging, with certain limitations, and one that will benefit greatly from good communication between the two people working on the project. In most cases you will get the best results if each individual sticks to editing different areas of the project, rather than freely working on the same individual binder items. Here are a few problematic areas to watch out for:

- Your collaborator adds files to a folder you move to the trash: the result will be that the files they added to the project will be in the trash as well, as they were assigned to a folder that you trashed independently.
- They add files to a folder that was not only trashed but fully deleted: in that case the folder will be “resurrected” back into its original position in the outline, because the child files they added to it depend upon it.
- You both edit the same item's text: the latest version will be used, however a snapshot of the chronologically older edit will be taken as well, so you can review the conflicting changes using that feature and manually merge the text edits as you see fit. This can also be used to revert the text if the merging process chose the wrong copy.
- If metadata is edited simultaneously: if for example both of you set the same item to a different label, the most recent modification date will take precedence. There will be no mirror copy showing the older changes, so this is one area where communication will be important. If metadata is being used heavily in the project by both people, it will be best to stick to editing different areas of the project at once.

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## 5.4 Project Templates

Simply put, project templates are ordinary projects that have had some basic starter material added to their binders and some settings tweaked to reduce how much work you need to exert to get started on a new project. They are in a word, well, two words: starting points.



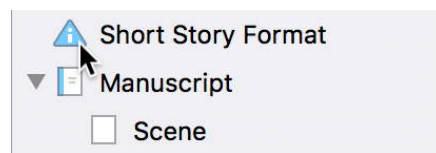
In our built-in templates, the example items added to the binder are guides for how you might organise your work, not forms that you have to fill out or features that must be worked around if you prefer another approach. The items you will find in the binder are like any other items you’ve added to projects on your own. They can be deleted, modified, duplicated, or set aside and ignored.

One need not start with a template at all. In fact many prefer the simplicity and flexibility of starting with a blank slate. Whatever route you take, as you are learning the software, feel free to experiment with the different templates we’ve provided. You may find valuable insight into how you could use the program, even if you never use the template in question.

Lastly, you can create your own templates for future use, as a way of further customising Scrivener’s default behaviour, as many settings are specific only to individual projects rather than global to the application.<sup>7</sup>

### 5.4.1 Getting Started with Built-in Templates

In our built-in templates you will find a help document at the very top of the Binder that explains what the purpose of the template is, how best to use it and in some cases, step-by-step instructions for popular modifications that can be made to its design. Most also contain a sample PDF in the Research folder showing how the final draft will look, using its default settings.



**Figure 5.2** Look for the blue “information” icon to get help on a template.

Beyond the help file, here are a few things to keep in mind as you explore a new template:

- It is possible to rename the Draft and Research folders, and some templates have done so for clarity, such as the short story format ([Figure 5.2](#)), where the draft has been renamed to “Manuscript”. Feel free to rename this to something more appropriate, like the title of your work.
- Some templates will have document templates ([section 7.5](#)) set up within them, providing a few special types of document (like character sheets). You can modify the items in this folder to customise them or add your own.

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<sup>7</sup> If you’re looking for general information on how to create a new project from a template, please refer to Creating a New Project ([subsection 5.1.1](#)).



After you have created a project from a template, there will be no connection to the original template, meaning existing projects that you created from a template will not be modified to reflect changes made to the template they were created with.

### 5.4.2 Converting a Project to a Different Template

The short answer is that there is rarely a need to do this as there would be little benefit in doing so. Everything about a template can be exported into other projects, and so the best approach may be to bring select elements of the template *into* your project, rather than copying your work into a brand new project. The specifics of how to do so are better documented in relation to those features themselves, so below you will find a handy list of cross-references to areas of a template that you might find useful to transport:

1. Transferring stylesheets between projects, in Copying Stylesheets Between Projects ([section 17.5](#)).
2. Making project compile settings global, in Project vs My Formats ([subsection 24.1.1](#)).
3. Copying files and folders between projects, in Copying Files and Folders Between Projects ([section 6.3.4](#)).
4. Copying Section Types, in Transferring Section Types Between Projects ([subsection C.2.4](#))

### 5.4.3 Creating Your Own Templates

Creating custom templates is as easy as creating a new project, and if you often set up projects with the same starter items—like character sheets, keywords, or custom labels—personalised templates can save you a lot of time. Here is a list (by no means complete) of things that are commonly changed or added to custom templates:

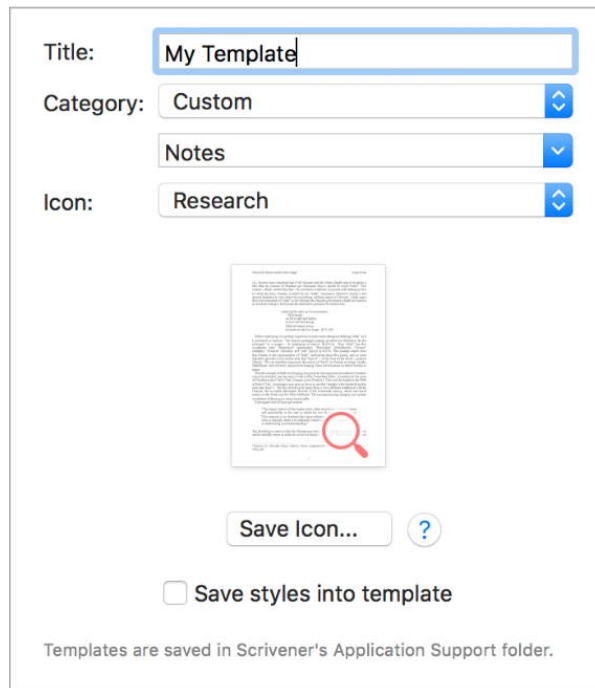
- Custom labels & status: add the types of labels, preferred colours, and status stamps that you find useful for your projects.
- Project bookmarks: try making a list of writing resources, critique groups, and research portals that you often use.
- Character sheets or research note starters: use document templates ([section 7.5](#)) to supply yourself with your favourite starter documents.
- Compile settings: since they can be stored in the project settings, you can configure these so that your future projects will be ready for one-click export (or close to it!).

- Collections: standard collections as well as saved search collections can be placed in a template as well.
- Starter story structure, essay skeleton, snowflake methods, thesis model or blueprint outline: set up your favourite or necessary techniques and outlines in the draft.

The important concept to keep in mind is that whatever you can save within a project, you can save as part of a template<sup>8</sup>. There are a few differences (mostly pertaining to how a template is loaded and the description and thumbnail that can be saved with it), but for the most part you should consider a template no different from an ordinary project.

Try not to worry about getting everything perfect the first time through. It is easy to update existing templates with revised material; this will be covered in detail in the following pages.

Once you have set everything up, use the **File ▶ Save As Template...** menu item to start the template creation process.



**Figure 5.3** Fill out the simple form to create a template out of the open project.

In the New Project Template window (Figure 5.3), provide the following details:

<sup>8</sup> Technically, there is a 50 MB size limit to what can be saved as a template, but given that a template is intended as a *starter* project, you are unlikely to ever encounter this restriction.

**Title** The visible title of the template, as you want it to appear in the template browser.

**Category** Declares which section to add the template to in the browser.

Select “Custom” to create your own category, using the name supplied in the text field below. Any existing categories that have been installed into the software will be listed for your convenience.

**Icon** Here you can select the appearance of the template thumbnail. You can choose from a number of available presets, or if you wish to make your thumbnail stand out from the built-in templates, you can click the **Save Icon...** button, which will generate a file for you based on the currently selected thumbnail. “Blank” is a good choice if you want a clean canvas to start from.

After you have edited the image using your favourite image editor and saved it, you can use the Icon menu to select “Choose...”, at the bottom of the list, and then select the image you edited.

**Save styles into template** If you’ve created styles that are important to the presentation and functioning of the template, you can choose to have them added into new projects upon use of the template. If you leave this option off, then the default set of styles (as seen in the “Blank” starter) will be used instead. The styles will be saved into the template no matter, merely left inactive, should you change your mind in the future and revise the template to include them ([subsection 5.4.4](#)).

After clicking **OK**, the template will be saved into the system, and you can delete the original project or continue working in it without affecting the template.

## Template Placeholders

There are several placeholders ([Table 5.1](#)) that you can type into the editor that will be particularly useful if you intend to share the template with others. When making a template for yourself, you could just write in your name and address on your manuscript submission cover-page, but this wouldn’t work so well if you wish to share the template.<sup>9</sup>

Place the template variable where the intended text should occur (for example you could put the `<$template_projectName>` placeholder on the title page and format it nicely), and when the template is used to create a new project, it will

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<sup>9</sup> In fact Scrivener will check your templates for stuff that looks like your personal information and warn you if you wish to proceed.

request relevant information from your settings (using the information you provide in the General: Author Information settings pane ([subsection B.2.3](#))) and fill in what details it can.

**Table 5.1** Project Template Placeholders

Placeholder	Description
<\$template_firstName>	First name from your settings.
<\$template_lastName>	Last name.
<\$template_fullName>	Combines the first and last name for you, ordering them according to system language settings.
<\$template_initial>	First letter of first name.
<\$template_street>	Street address.
<\$template_city>	City.
<\$template_ZIP>	Postal code.
<\$template_state>	State or county.
<\$template_country>	Country.
<\$template_phoneNumber>	First phone number.
<\$template_email>	Email address from settings.
<\$template_projectName>	The file name of the project from when it was created. Note this will not include the “.scriv” portion on the end.

## Custom Categories

The project templates that you create, or acquire from others, can sort themselves into custom categories, which will appear in the template chooser sidebar along with the built-in categories (Fiction, Non-Fiction, and so forth).

### Upgrading from Scrivener 2

If you are still using Scrivener 2, these categories will not be visible, and the projects organised into them will all be filed to the “Miscellaneous” section. Of course, if the project template itself is in v3 format then they will not work in the legacy version of Scrivener anyway.

To create a new category:

Categories are defined by the templates themselves, rather than being something you create first and then put templates into. Thus, if you download a template from the Web, it may install itself into a new category automatically.

To make new categories, this will be done either in the process of creating a new template with the **File ▶ Save As Template...** menu command ([subsection 5.4.3](#)), or updating one that has already been created by right-clicking on it and selecting **Edit Template Info...** from the contextual menu ([subsection 5.4.4](#)). Either way you will arrive at the “Save as Template...” dialogue:

1. From the “Save as Template...” panel, click the **Category** dropdown and select “Custom” from the bottom of the list.
2. Type in the name of the category as it will be seen in the template chooser sidebar. Any existing categories will be listed here for your convenience, and can be selected by clicking on the button to the right of the text field.
3. Confirm the rest of the settings and click the **OK** button.
4. Use the **File ▶ New Project...** menu command (**⇧⌘N**) to view the results.

To rename an existing category:

This will update all templates found within that category. If you copy these templates to another machine, they will assign themselves to the revised category name.

1. Open the new project template chooser.
2. Right-click on the category and select “Rename Custom Category...”.
3. Type in the new name and click **OK**.

Categories cannot be removed directly. They will be removed automatically from the sidebar when all templates using it have been removed or modified to no longer be in that category.

### 5.4.4 Revising Templates

If all you wish to do is modify the way a template appears in the template chooser, or to enable or disable whether its built-in styles are used when creating new projects, then you need only edit the template in place:

1. Bring up the new project window with **File ▶ New Project...** (**⇧⌘N**).
2. Right-click on the template you wish to modify and select the **Edit Template Info...** command.
3. Make the changes you desire, and click **OK** to save them.

### Can I Modify the Built-in Templates?

Built-in templates cannot be overwritten or modified, but you can create projects from them for editing and then save your modifications as a new template by giving it a new name.

To update the *content* of a template that has already been saved:

1. Create a temporary project using the template you are wanting to adjust. The name and location are unimportant to the process.

If you need to edit a template that uses placeholders (many of the built-in templates do), follow these instructions when creating the temporary project for editing the template:

- a) Bring up the new project window with **File ▶ New Project...** (⇧⌘N).
- b) Select the template you wish to revise.
- c) Hold down the **Option** key, and click on the **Create** button.
- d) You can let go of the **Option** key and give the project a name.

This procedure will stop the substitution of these placeholders so you can edit the template file and then save it as an update without having personal information inserted into it.

2. Make any desired changes to this temporary project.
3. Use the **File ▶ Save As Template...** menu command. When editing an existing template, the information from the original template will be filled in for you, so you do not have to worry about retyping in the title<sup>10</sup> or adjusting the icon every single time. If you do not need to make any changes here, just click the **OK** button.
4. If this is a custom template you are updating, you will be asked if you want to overwrite the existing template or keep both and sort it out later.
5. Discard the temporary project, or set it aside for future adjustments to this template.

---

<sup>10</sup> If you change the title, it will no longer be considered a replacement or update to the original template, meaning you'll end up with two of them.

### Upgrading from Scrivener 2

If you've developed a number of templates in previous versions of Scrivener, the good news is that you won't have to do much of anything to use them in Scrivener 3, and if you leave them alone you'll be able to continue using them in the older version as well.

Upon use, you may notice that the project created by the template will be upgraded seamlessly for you. You might eventually want to update these to the version 3 format to avoid this step; simply follow the same directions you would to make a revision to an existing template ([subsection 5.4.4](#)). Having done so in the new version, the project template itself will now be stored in the new format (it will no longer work with older versions of Scrivener).

## 5.4.5 Managing Templates

In the Template browser window, the **Options** button in the bottom left ([Figure 5.1](#)) provides the following features for managing your templates (you can also right-click directly on the template tile itself to access this menu):

**Set Selected Template as Default** Changes the default template selection to the template you currently have selected. Once set, the next time you call up this window it will highlight that template for you for quick access.

**Hide Getting Started** Hides the “Getting Started” category at the top of the category list. The functions it provides can also be accessed from the Help menu at any time, so it is safe to remove the category once you've familiarised yourself with the program. You can also reveal it again using this same option menu.

**Import Templates...** If you have downloaded templates from the Web or copied your custom templates from another computer, use this feature to import the files into the template system automatically.

**Export Selected Template...** Useful for sharing your templates on the Web, with other authors or for transferring templates to another working computer.

**Edit Info...** Modifies how the template appears in the template chooser, such as its title, icon, category or whether or not it builds predetermined styles into the new projects created with it. Refer to Revising Templates ([subsection 5.4.4](#)) for further information. Built-in templates cannot be edited.

**Reveal in the Finder** Reveals the selected template on the disk, using your file manager.

**Delete Selected Template** When a custom template is selected, you can use this menu item to remove it from your system. Built-in templates cannot be removed.

For those interested in managing these as files directly, rather than using the above commands, templates are stored in Scrivener's support folder (use the **Scrivener ▶ Reveal Support Folder in Finder** menu command to get here easily), under the "ProjectTemplates" subfolder. Changes made to this folder will be reflected in the template chooser window after it has been closed and reopened.

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## 5.5 Adjusting a Project's Settings

Each individual project that you create will have many settings available to it, both as on-the-fly adjustments that can be made using the main application menus (primarily the **View** menu), as well as those options found within the **Project ▶ Project Settings...** panel. Refer to Project Settings ([Appendix C](#)) for full documentation on the following settings:

- Section Types ([section C.2](#)): concerning how documents within the project are categorised into types, such as "chapter", "scene", "subsection", "table" and so forth.
- Label List & Status List ([section C.3](#)): set up the label colours and status markers used within the project.
- Custom Metadata ([section C.4](#)): design the types of metadata you can use to categorise your items in the project.
- Formatting ([section C.5](#)): override application defaults for how the text in your project should be formatted within the editor (as opposed to how they will format when you compile).
- Auto-Complete List ([section C.6](#)): make adjustments to the auto-completion dictionary used within this project.
- Special Folders ([section C.7](#)): setup for both the document templates folder, and where new project bookmark files should be stored (if you would prefer that to choosing where they are stored upon creation).
- Background Images ([section C.8](#)): set a backdrop to your composition mode environment, or use a special image for the freeform corkboard background.
- Backup ([section C.9](#)): override application defaults for how this project will be backed up (or even if it is).

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# **The Binder & its Outline**

6

## In This Section...

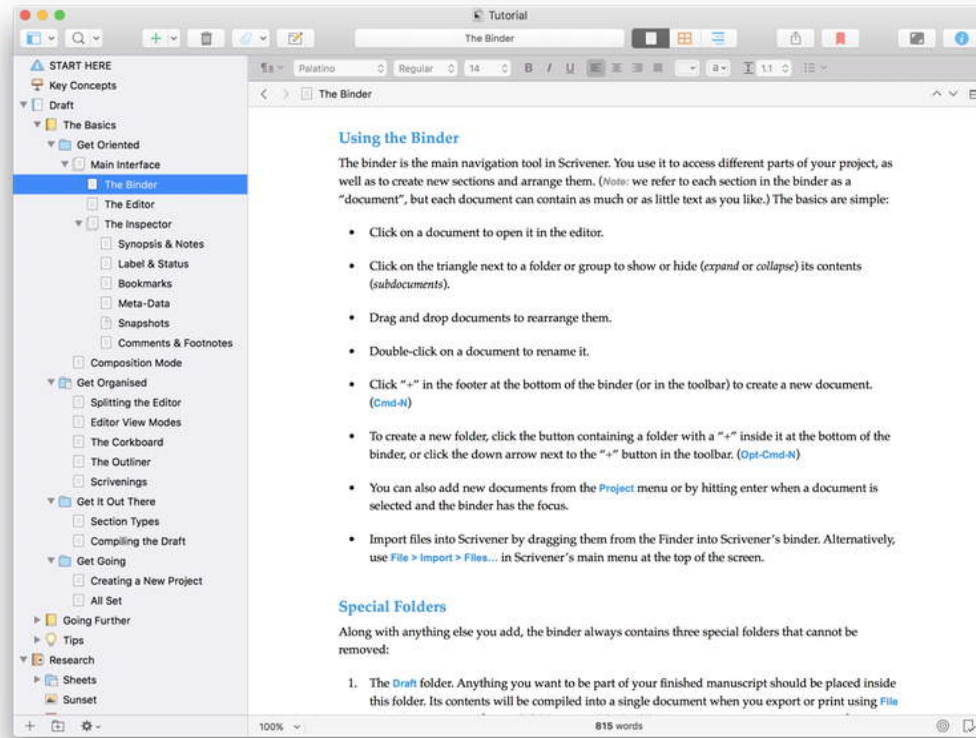
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The Binder is the document browser on the left of the main project window (Figure 6.1) where you can organise your writing as individual topical pieces, research files and so forth. This is going to be like your ring-binder in the real world, where you would stash all of the notes, research documents, never mind the work in progress itself. Everything that represents information in your project, from an idle thought to a formal paper on a topic you are writing about, will be stored somewhere in the binder.

To that end, the sidebar on the left is a fundamental building block in how a new project begins, all the way to being a cornerstone in how you will export your work and close the project down for good (or at least until the next revision!). This chapter will go over the various aspects of using the binder, setting it up for a new project and how best to use Scriveners' features to structure, navigate within, edit and write your draft.

### Wondering if a project can have multiple binders?

It cannot, any more than a bucket cannot have multiple buckets. The project and the binder are one and the same, and both full encompass everything within it. There are however ways of creating multiple lists of items within your binder, which can for a time replace the binder list in the left sidebar, allowing you to focus on a particular group of items, or even organise them differently. For more information on this feature, refer to Using Collections ([section 10.2](#)).



**Figure 6.1** A typical project window, with the binder on the left and an editor on the right.

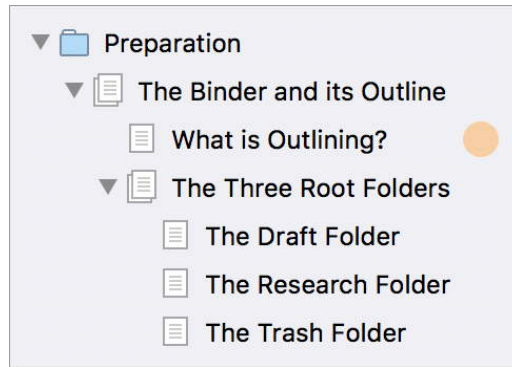
## 6.1 What is Outlining?

If like many authors you are accustomed to working in word processors for most of your writing, you no doubt have a few habits and ideas that you'll inevitably bring with you to Scrivener. If you intend to get the most out of what this program offers, there are a few fundamentals worth learning, mulling over and eventually applying to your approach. Fear not, we aren't going to say you have to learn how to plot out your outline in advance before dipping quill into ink pot! The point here is to get a feel for what that framework is, so that you can decide how best to make use of it.

Scrivener provides a simple means toward working with many multiple smaller pieces of text. This user manual, for example, has each section of the manual in its own document, and is comprised of nearly 2,500 such snippets of text arranged into a detailed indented list of topics (Figure 6.2). That mechanism is what we call an “outline” in software.

While the manual often uses this structure to produce visible headings when exported, we need not necessarily think in terms of parts, chapters, sections and subsections—especially early in a project's development. We could merely organising things topically, or even chaotically into groups you intend to disperse later once you figure out how all of these pieces of text are meant to fit together.

This approach grants you ultimate flexibility in how you think around the structure of your work. Your outline needn't serve some external stipulation while creatively constructing it—rather, it can be used to augment your own understanding of the topical layout of the text.



**Figure 6.2** An excerpt of the outline used to organise this section of the manual you are reading; current section marked in orange.

If you have never used nor even heard of the type of software referred to as an “outliner” before, there will be some useful jargon to learn, as it will be used elsewhere in this manual to refer a few simple concepts concisely:

- Outlining is in part a visual metaphor that declares some things as being *children* to other things, based upon their relative level of indent. If something is indented “beneath” an item, then it is considered a child of it, and that item is a parent to it. In [Figure 6.2](#), “The Draft Folder” is a child item of “The Three Root Folders”, the latter of which is also a parent of “The Trash Folder”.
- A list of parent and child items is sometimes referred to as a *tree*.
- The action of putting items beneath another is sometimes referred to as “nesting”. We can also say that indented subdocuments are “nested” beneath another item.
- A child (or a *leaf*) can only ever have one parent.
- Items at the same level of indentation are referred to as “siblings”.
- A crucial feature of digital outlining in principle is that you can hide child portions of the outline by folding, or collapsing their respective “parents”, keeping your screen focused on what you are currently working on.

You could draw a connection between this approach and the outlines you may have had to compose prior to writing an essay assignment. Unlike those pen and paper outlines, you can imagine the digital counterpart as being as though each line on the paper essay had a stack of pages beneath it, where that portion of the essay is represented by the topic line it relates to. Thus, moving a heading in a

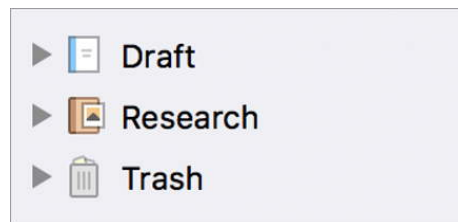
digital outline moves the stack of paper along with it, thus changing the order of the longform text this outline represents.

This is all a bit abstract, so let's move on to some applied examples of the concept, starting with the three basic top level groups (folders, parents or trees) that every project will be working around.

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## 6.2 The Three Root Folders

The binder has three default root folders which cannot be deleted or moved from the top level. They can be renamed and moved around among each other, but not within each other or other folders. To use Scrivener effectively, it is very important to understand the significance of these folders.



**Figure 6.3** The three default top-level folders

### 6.2.1 The Draft Folder

As the name suggests, the Draft folder is where you place all of the files you want to include in the actual work that others will read. How you structure it is entirely up to you—you may have parts and chapters, or you may have separate files for each scene within each chapter, or even separate files for each individual paragraph if you so wish.

#### **My Project Doesn't Have a “Draft” Folder**

Some of the templates that we provide with the software have had the “Draft” folder renamed to something more meaningful to that template's purpose. For example the Novel template has the draft folder renamed to “Manuscript”. The draft folder can be renamed to whatever you wish. The key thing to look for is the special icon (Figure 6.3). Only one item can have that icon, so no matter what it is called, that is your Draft folder. You can also use the **Navigate ▶ Reveal Draft Folder** command at any time to bring up the binder and highlight the draft folder, no matter what it is called.

At a basic level, everything that goes inside the Draft folder will be compiled into one long text file when you use the “Compile...” command from the File menu<sup>1</sup>. Thus, the draft folder is central to Scrivener: ultimately, you are aiming to write and arrange everything inside this folder so that each of the elements it contains form an organic whole that can then be output as a singular file to the format you require. It is less useful to think of its contents as *files*, then, and more useful to think of it as a personal table of contents for the text that will become a document when you export.

Another good way to think of the draft is that it represents a long spool of paper or a scroll. In a normal word processor, this entire spool would be presented to you in a single window, with one scrollbar. Moving text around within that spool means cutting and pasting it from one spot to the next. In Scrivener, you can take that long spool of text and chop it up as you please. The compile feature offers a way to “tape” the whole thing back together into a single spool.

Because the draft folder is what is used to create the final manuscript, it is unique in that it can only contain text and folder items. That isn’t to say you cannot include illustrations and figures in your work, they can be inserted into the text editor just as with any typical word processor, but that the listing in the binder can only be text sections, either as a loose list or organised into logical groupings.

## 6.2.2 The Research Folder

The Research folder is the default import location for non-text documents such as images, PDF files and so on (although it can hold text files too). You can create as many subfolders as needed to organise your research, or you can rename it and create other folders in the root level to hold different types of research or supporting material. Technically speaking, anywhere outside of the draft folder is a valid place to organise research, old drafts, notes and inspirational materials.

As noted, some import functions will target this folder if no other target is provided. If you imported something, such as clipping a PDF to Scrivener from another program’s print panel and don’t know where the PDF ended up, check in the Research folder first.

## 6.2.3 The Trash Folder

Whenever you delete a file in Scrivener (by pressing **⌘Delete**, for instance, or by selecting the **Documents ▸ Move to Trash** menu item), the file is not actually removed from the project but is instead moved to the special Trash folder just

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<sup>1</sup> As is often the case with Scrivener, there are many exceptions. The contents of the draft folder can be dynamic, only compiling into the final document under certain conditions, never compiling at all or only piecemeal, but for now it is good to think of the draft folder in the binder as a structural take on the larger work you will be exporting.

like the Trash in the Dock. You can tell at a glance when items are in the trash folder as its icon will appear like an overflowing trash can. Permanently purge all trashed files from the project with the **Project ▶ Empty Trash...** menu command.

#### Deleting Only Selected Items from Trash

To permanently delete individual files from the Trash, without fully emptying it, select the items you wish to purge from the project and use the **Edit ▶ Delete** menu command, or by right-clicking on the selected items from within the trash.

Files that have been placed in the trash will have their icons ghosted throughout the software. This is mostly useful where trashed files are displayed in other contexts, such as when listed in a search result.

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## 6.3 Using the Binder

Effectively working with the resources in your project is essential in a program designed to accumulate them. While the basics may serve everyone well up to a certain point, if you ever find Scrivener starting to feel a little awkward, you might want to come back to this section and review the various tools available for selection, modification of selection, focusing on content and movement of items with mouse, keyboard, menu commands and shortcuts.

Managing items and navigating among them is one of the chief areas of this program's design; it has a lot of depth that can be explored, both in its feature set and in how those features can be combined to create powerful workflows.

#### Relevant Settings

This section will refer to a few different options that impact how some of the described behaviour below will work. Unless otherwise noted, all options referred to in this section are located in the “Behaviors” settings pane, under “Dragging & Dropping” ([subsection B.4.4](#)).

We aren't going to be exploring every detail of how folders and files work here. If you're looking for a more in-depth look at items themselves, refer to All About Files and Folders ([chapter 7](#)).

### 6.3.1 Adding New Items

Before going about working with items in your binder, you'll need a few to start with. There are three basic *types* of item native to Scrivener's binder: files, folders

and file groups—or what you get when you indent one file under another—let’s talk about how to make these things and what to expect while doing so.

Although this is a section about the binder, it is worth noting that you can add new files and folders from nearly every context within the project window. If you are editing a text file you can use one of the methods below to add a new document, and Scrivener will consider the currently edited document as “selected” for determining where the new item will be placed.

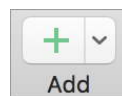
Scrivener tries to keep your context persistent: for example if you’re writing in a document’s Notes inspector pane and press **⌘N** to create a new file, you’ll end up typing in that new file’s Notes pane. If you create a new folder from the main text editor, you’ll be able to start creating new cards on its corkboard immediately. Want to give the new thing a name before getting to work? Click into the editor header bar to edit its name, or use the shortcut: **⌘⇧T**.

Something to bear in mind is that naming things in Scrivener might not always be important to do immediately. Unlike files on your system, your items will be given useful “handles” if you leave the name off of it. Read more about this capability in Titles and Adaptive Naming ([section 7.2](#)).

## The Many Ways to Add Things

Since making new documents is such a vital part of Scrivener we’ve provided numerous ways to go about doing so, from toolbar buttons, to keyboard shortcuts to simply pressing the **Return** key. Let’s go over the options:

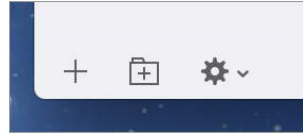
**The “Add” button in the toolbar** This is a multipurpose button, as indicated by the downward facing arrow on the right-hand side ([Figure 6.4](#)). That means if you click on the left side, it will create a new text file. If you click on the arrow, you’ll get a selection of available types for this project. By default that will be files, folders and web pages (the latter will be disabled if you’re trying to add within the Draft folder area). If the project has Document Templates ([section 7.5](#)) you’ll see those listed here as well, and after those you’ll see any shared document templates ([subsection 7.5.3](#)).



**Figure 6.4** The “Add” button on the default toolbar.

**Footer bar buttons** Along the bottom of the binder sidebar, corkboard and outliner views you will find a footer bar with a few buttons for adding files and folders ([Figure 6.5](#)).





**Figure 6.5** Binder footer bar: Add Text, Add Folder and access to the contextual menu.

**Contextual menu** The “Add” submenu in the right-click contextual menu provides all of the basic options found when clicking the downward arrow on the toolbar “Add” icon. In addition, it also provides quick access to the **File ▶ Import ▶ Files...** menu command (**⇧⌘I**) as “Existing Files...”.

**Menus & keyboard shortcuts** There are several shortcuts available for adding new items:

- **Project ▶ New Text (⌘N)**: adds a new text file. In cases where the selected item has default subdocument template ([subsection 7.5.2](#)) assigned to it, the name of that template will be printed instead. E.g. when clicking on the “Characters” folder to add a new character sketch, in the Novel project template, the menu command will read, “New Character Sketch”.
- **Project ▶ New Folder (⇧⌘N)**: adds a new empty folder.
- **Return**: by default this will add a new text file (or default template if applicable). Note that this key is also used to confirm changes being made to the title of an item, so if you have been typing in the name of one item and wish to make a new one, you’ll need to tap it twice.
- The **⇧⇧⌘N** keyboard shortcut can be used to create the primary document template (first entry in the **Project ▶ New From Template ▶** submenu), if the project has document templates enabled.

**Dragging text** If you select text in any program and drop it into Scrivener’s binder, corkboard or outliner views, a new item will be created in that location with the text you dropped. If this is done from within Scrivener’s editors, then text will be *moved* into the new file. This is a great way to break apart a larger file: you can scroll through, selecting chunks of text and moving that text to new files wherever you drop them. Where you drop the text will matter:

- **Onto a folder or file group or in between binder items**: the text will be added as a new file nested within the container you dropped on, or at the location of the drop.
- **Onto another file**: the text will be appended to that file.

- Onto a folder or file group with the **Control** key held down: the text will be appended to the group's main text.
- Onto another file with the **Control** key held down: the text will be added as a new file beneath it, and thus turning the file into a file group with a new subdocument.

The behaviour to move dragged text can be disabled with the **Delete text dragged to other areas** option, in the Behaviors: Dragging & Dropping settings pane ([subsection B.4.4](#)).

**Adding items with the Touch Bar** Last but not least, if you own a Mac with a Touch Bar, one of the default buttons provided universally is the “Add” button, again represented with a “+” sign. With the exception of importing web pages, it essentially replicates the options provided by the “Add” button in the toolbar, when clicking the downward arrow. Refer to the Touch Bar's Global Buttons ([section 4.4.2](#)) for more information.

## Figuring Out Where Things Will Go

A basic concept to be aware of is that Scrivener will create new items relative to your current selection in the active view (be it the binder, editor or its copy-holder). For example if we select a file in the binder and add a new text file, the file will be created after the selected file. When the focus is in another area of the project window, the selected item in the active editor view will be used. For example, if you create a new item while typing in the editor the new item will be created relative to the item being edited. In cases such as these, Scrivener will attempt to preserve your current focus—in this example, you would go on typing in the main editor for the new item.

## How Things Are Nested When Added

You may have noticed that sometimes files seem to be nested when you create them and other times they aren't. The logic behind this is very simple, though a little unorthodox if you're used to file managers or other outliners. Scrivener's logic is designed to produce the most often desired result, and can be simply understood by what *type* of thing you are creating:

- When creating a folder, the behaviour will always be to add the folder as a sibling to the selected item.
- When creating a file, if a folder is selected, it will be nested as a child to that folder. Most often you'll want to fill up a new folder with files, so this works to your advantage.
- When creating a file with another file selected, then it will be created as a sibling. Again most often you won't want to nest the file beneath the other file, but if you do simply hit the **Edit ▶ Move ▶ Move Right** shortcut: **⌘⇧→**.

There are a few exceptions:

- When the Draft or Research folder is selected then *anything* you add will be nested beneath it. This is in part to help prevent cases where one tries to create a new folder or file in the draft, and ends up accidentally adding it to the root level, where it will not compile. If you want to create a folder or file at the root level, then select something other than Draft or Research, or use the **Edit ▶ Move ▶ Move Left** shortcut  $\text{^}\text{⌘}\text{←}$ , after creating it.
- If a group has a default subdocument template assigned to it (like the character sheet folder in some of our built-in templates), and if that default template so happens to be a folder, then in that case the new folder will be a child.

When items are nested upon creation the behaviour is to add that item to the very bottom of its child list. If you want to create the item at a specific location within the folder, it is better to select the sibling to place it after.

#### How Can I Modify These Defaults?

There are two preferences to adjust how some of these interactions occur, both located in the Behaviors: Folders & Files settings pane ([subsection B.4.5](#)). **Always create new items as siblings** does just what you would expect. No longer will files be nested under folders (however the two exceptions above cannot be overridden). Secondly, **Treat all documents with subdocuments as folders** will make it so all of the above behaviours apply to file groups as well as folders. Now when you select a file group and hit the **Return** key, the new file will be nested beneath. This setting also broadly impacts how file groups work in general: they will now use group views (like corkboard) when you click on them, among other minor adjustments.

## Renaming Items

To rename an item you've created, double-click the title to toggle editing mode. You can also use **Esc** key to toggle editing mode on the selected item. You can click elsewhere to save the modified title, or use the **Return** key to confirm your changes.

If a title is left blank, Scrivener takes a dynamic approach to how things are named. You can read more about titles in Titles and Adaptive Naming ([section 7.2](#)).

### 6.3.2 Selecting Items

Any single item can be selected by pointing the mouse at it and clicking, I think we can all agree about that one. While that does the trick for most tasks, Scriv-

ener was also built around the concept of selecting and working with multiple items at once. Not only does this make it easy to do tasks with many items simultaneously (say, to move ten files from one section of the outline to another with drag and drop), but the editor itself will react accordingly, displaying those items you select as a group.

#### How does this work with the editor?

In this chapter we will mainly focus on the binder sidebar itself, rather than how it interacts with the editor. If you want to bridge that gap in your reading, The Editor ([section 8.1](#)) begins this discussion in reference to how the editor itself can be used to receive and display items, but the Project Navigation ([chapter 12](#)) section is where you will find the most complete reference on how the sidebar and the editor work *together*.

## Keyboard Navigation

The four arrow keys by themselves will move the selection around in the outline according to the following rules, and can be augmented with a few modifier keys:

- **↑** and **↓** move the selection up and down the list from one visible item to the next.
- **←** will move the selection leftward in the hierarchy, selecting the parent of whatever was selected when pressing the key. The left key will also collapse the selection, if any of the selected items are expanded. If a group (or all groups within the selection) is already collapsed the left key will act normally.
- Adding the **⇧** key to the **↑** and **↓** keys will expand or contract the current selection, depending upon which way you started when first holding down shift. For example: **⇧↑** will leave the item you started with selected, but add the prior item to the selection as well, while pressing the combination a second time will add a third. At this point, **⇧↓** will contract the selection, or remove the top item from it, resulting in the first two items you had selected. This all works in exact inverse when starting in the opposite direction.
- **⇧⌘↑** and **⇧⌘↓** will jump from one visible container to the next, skipping over any regular items in between.<sup>2</sup>
- **⌘↑** and **⌘↓** jump your selection to the top or bottom of the outline, respectively. This command, when combined with the **Shift** key will *select* from

<sup>2</sup> This behaviour is expanded to include all containers when **Treat all documents with subdocuments as folders** is set to true, in the Behaviors: Folders & Files settings pane ([subsection B.4.5](#)).

the current point to the top or bottom of the list. This is different from the **Home** and **End** keys, which will only scroll the view, thus retaining your current selection.

## With the Mouse

Selecting items with the pointer (whether it be controlled by mouse, trackpad, tablet or joystick) taps into a standard set of functions that are broadly useful in many applications.

- As noted above, simply clicking on an item will select it and simultaneously remove the previous selection, meaning you'll only ever have one item selected at a time when clicking.
- Hold down the **Command** key to add or remove individual items from the current selection. Like clicking normally, this only works on the thing you click on, one at a time. You can also toggle the selection off for the one item you have selected.
- Hold down the **Shift** key to select all of the items in between the first point selected and the point where you click. So for example if you click on C and then ⌘Click on E, the result would be to have C, D and E selected. If you then ⌘Click on A, the result would be A, B and C, because C remains the first selected item.
- Given the logic governing these two modifiers, they can be combined. Going from the prior example, if we select A, ⌘Click on C, ⌘Click on E (which resets the last selected item) then ⌘Click on G, the result will be A, B, C then E, F and G selected.

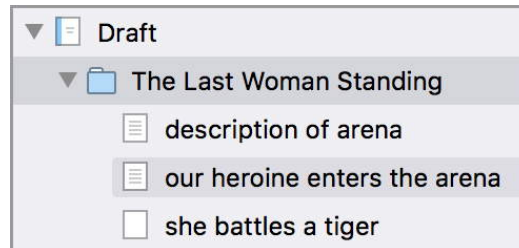
### 6.3.3 Finding Where You Are in the Outline

When you click on items in the binder and then move over to the editor, the last thing you selected will remain highlighted in the binder until you yourself change it. If the editor ends up viewing something other than what you clicked on in the binder (for example, loading a corkboard first, and then from within the editor corkboard, loading one of the cards so you can write in it), the highlight will no longer be pointing at the thing the editor is working with.

There are a few advantages to this behaviour, all which work together to maintain the binder sidebar as a workspace that you have control over:

- It means you can always get back to where you were, since that initial point of navigation is “bookmarked” for you in the binder.
- Since the binder isn't required to always highlight what you are editing, whether folders are collapsed can remain entirely up to you.
- Where you scroll the binder is left up to you.

Under default settings, if the item you are editing is visible in the binder, a smaller secondary highlight will be placed on the item you are currently viewing. In [Figure 6.6](#), we can imagine the author initially clicked on the folder named “The Last Woman Standing” (which we can hope is a working title) and then later went on to write into the subdocuments within this folder—currently in “our heroine enters the arena”.



**Figure 6.6** The binder highlights what we select as well as what we edit.

This form of highlighting is “passive” in the sense that it won’t violate any of the above principles. If in our example “The Last Woman Standing” was a collapsed folder and we couldn’t see the scene files within it, then there would simply be no secondary highlight. If we had scrolled to another part of the binder, this item would be highlighted—but we’d have to scroll back to the spot ourselves to see it.

If you find this behaviour distracting, the current document indicator can be disabled in the Appearance: Binder: Options settings pane ([section B.5.2](#)), with **Show current editor document indicator**.

For those cases where you really do want to see what you’re editing no matter what it takes to do so, then use the **Navigate ▶ Reveal in Binder** (⌘R) menu command. This will first reveal the binder if necessary, then switch to the main binder listing (in case you are viewing search results for example), open any folders necessary to display the item and finally move the *primary* selection highlight to the item(s) you have selected. This all-purpose command is useful for finding your place, if you’ve wandered far away from where you started, locating where search results came from or merely just to synchronise the binder with your current editing session.

### 6.3.4 Moving and Copying Things Around

Once you’ve got things selected, you might want to move them from one place to another. Simple drag and drop with the mouse will often suffice, but there may be times when more precision is required, or in some cases, where the distance between here and there is too far to easily drag. As you might be coming to expect by now, there are a few different tools in this chest.

**Moving with the mouse** Items can be moved around in the binder with drag and drop. Pick up the item by clicking and holding the mouse button

down, then drag the mouse pointer to where you wish to drop the items, releasing the button. The binder will display target, in accent colour, underneath the pointer, showing where the drop will end up. Slide the mouse left or right to control the indent level of the drop point, and leave the mouse along the top or bottom edge of the view to dynamically scroll it.

If the place you want a drop a thing is inside of a group that is collapsed, hold the item over it for a moment and it will expand for you. If you would prefer “spring-loaded” folders like this to collapse again after you drop, you can set the **Collapse auto-expanded outline items after drag and drop**, in the Behaviors: Dragging & Dropping settings pane ([subsection B.4.4](#)).

**Copying with the mouse** Although not enabled by default, you can toggle this capability with the **Option-dragging creates duplicates** option, in the Behaviors: Dragging & Dropping settings pane ([subsection B.4.4](#)).

Another approach is to duplicate the files with the **Documents ▸ Duplicate ▸ with Subdocuments and Unique Title** command (**⌘D**), which will create a copy right alongside the original that you can drag and drop to the intended location.

**Moving items with the keyboard** The **⌘↑**, **⌘↓**, **⌘←**, **⌘→** keys can be used to move an item around spatially in the binder, step by step. Up and down will move the item in the outline respectively, while left and right will promote and demote the item. E.g. selecting a folder that holds the contents of chapter eight, and pressing **⌘↓** will move it down one spot, swapping its position with the chapter below. It will now be chapter nine, and the other chapter will be eight.

**With the Toolbar** Although not present in the default set of toolbar icons, you can add item movement buttons (shaped like blue arrows) to the main toolbar ([subsection 4.1.1](#)), provided as either a four-way set of movement buttons, or two pairs of up/down and left/right buttons. These operate in a similar fashion to keyboard movement, one step at a time in the indicated direction.

**By the icon** A bit of knowledge that can save you a lot of time is that everywhere you see an icon in Scrivener, you can drag it, and in doing so it will act as a proxy for that item, just as though you dragged it from the binder or any other view. You might be writing in a file in the editor and realise you want to move the text you are working on to a spot in the binder on your left. You could attempt to locate the item in the binder and then drag it from point A to B, but instead you can drag the icon straight out of the header bar directly to B. Done, and you can keep writing without pause.



## Moving Multiple Items

When multiple items are selected most methods for moving them will gather these items together at the target location, in the same order.

- If the view you selected from has been sorted (such as in the search results sidebar or the outliner) then the moved items will be assembled in the target location using that sorted order. For example, if you drag the sorted items back into the folder they came from then the effect is to reorganise the items within that folder.

If that is not what you want, then use the **Navigate ▶ Reveal in Binder** (`⌘R`) command first, and then move them.

- When using the keyboard to move multiple items within a folder (up and down), the relative position of those items will be preserved. In effect, it will be as though each item were moved individually one at a time. Selecting the second and fourth items and moving them up would result in these items now being the first and third in the list, transposing the items they displaced down one slot.

Use drag and drop if you want to gather the selected items to one place within the folder.

- Items can be promoted and demoted (outdented and indented) with the keyboard, and when doing so they will be gathered together. Items must all be from the same container and level in the outline when doing so.

## Long distance travel

When you need to move a selection far enough that the point of its destination is out of sight, neither keyboard nor the mouse may be the most efficient way to do so. To fill in that gap, we have two methods that should help:

1. The **Documents ▶ Move To** submenu presents a list of all the items in your binder, each and every one of them a potential target for your drop. The item you select will become the parent for the selected item(s), placed at the end of the target item's child list. An item that is not a group will become one by targeting it with this command.

Once you have moved a file using this menu, a “Move to ‘X’ again” command will be added to the Documents menu that will move the currently selected item to the last used move location, with the added keyboard shortcut, `⌘T`.

2. If you prefer the mouse for all things, consider using the main editor as a long distance tool. Select the item(s) you wish to move, which will load them into the main editor, then scroll to the drop point and drag the icon from the editor header bar into the binder, or for multiple selections, select the items in the editor and drop them into the binder.



It might also sometimes be easier to do things the other way around. You can load a folder into the editor as a corkboard or outline, lock it ([subsection 12.2.1](#)), and then freely drag binder items into it. With more than one split available (never mind the history tool making multiple folders easily available to you), it is possible to efficiently work with dozens of remotely scattered targets and hundreds of files.

### Copying files long distance

You might have noticed, from investigating the menu in an earlier tip, that it is also possible to create a long distance *copy* of an item via the **Documents** ▶ **Copy To** ▶ submenu. The behaviour is otherwise identical to the Move To command.

## Copying Files and Folders Between Projects

The easiest way to copy a file from one project to another will be through the following steps:

1. Open both of the projects at once.
2. Drag the item icon from the binder, corkboard or outliner view, or anywhere where you can see its icon and it is draggable.
3. Drop the icon into the project you wish to copy the item to, into a location where files can be dropped.

If you drop into a text editor or bookmarks list you'll get a link back to the item in the original project instead of a copy.

4. Alternatively, use the **Documents** ▶ **Copy to Project** ▶ submenu to file the selected documents directly into another open project, via the binder item selection menu. This command will record where you last filed a document, and create a convenience menu command that continues filing selected items to this project: **Documents** ▶ **Copy to Project** ▶ **Copy to "X" Project Again** (⇧⌘⌘C).

When copying items between different projects, Scrivener will do its best to keep as much of the information intact that it can. If you make use of the inspector to keep notes on your documents, tag them with keywords, use other metadata, take snapshots and so forth, you will notice that just about everything copies from one project to another. Here are some things that will be created (or copied over, however you wish to look at it) in the new project when copying:

- Keywords
- Labels

- Status
- Custom Metadata list entries (if a list field by the same name already exists, but it lacks a specific value in its dropdown menu, an entry will be added if the item requests it)

The following aspects of a file will be carried over:

- Title & Synopsis
- Main text content or media content (for example if dragging an image)
- Any style assignments within the text, provided there are like-named styles in the target project (the formatting will remain for you to update if you wish to do so)
- Notes
- Bookmarks (note that if your drag includes internal links between the dragged documents, these cross-references will be preserved. If you drag an item with bookmarks referring to items not included in the drag, those will be discarded from the copied item)
- Custom Metadata values (if the target project also has those fields by name)
- Custom icon assignment (if the icon is not available to the target project you may not see it, but the assignment will remain and start working once the icon is present)
- Snapshots
- Section type (if a section type of the same name is available in the target project)
- Any document writing goals and settings ([subsection 20.1.2](#)).
- Whether the document should be included in compile.

There are a few things Scrivener *won't* copy:

- Default subdocument section type.
- Default template for subdocuments.
- Project settings that apply *to* that item, such as compile settings, or whether a folder is the project's document template folder.

### 6.3.5 Expanding and Collapsing the Tree

Once the number of elements in your binder exceeds a certain point, it may prove beneficial to learn a few of the tools available for handling a large quantity of

items. The most recognisable of these is one you’ve already been introduced to: the “tree” view, or outline, where you can collapse portions of the tree to decrease the amount of information on your screen.

The ability to collapse and expand larger areas of the outline, either surgically or in bulk, can mean the difference between getting bogged down in too many details and obtaining focus in your work by keeping only the keystone information you need at your fingertips, and making it easy to find and get to the stuff that’s hidden, when you need it.

**By elements** As usual, we’ll get the basics out of the way first. To expand or collapse portions of the outline, click on the arrow to the left of any group to reveal or hide its contents. The *state* of every arrow will always be remembered, meaning you can expand or collapse areas within larger chunks of the tree, and then collapse the whole thing, assured that when you expand it again it will be as you left it.<sup>3</sup>

Use the ← or → keys to open or close the selected containers, respectively. The former key has a special behaviour in that if the group you have selected is already collapsed, it will move your selection to the parent of the current group, one level up.

Expand or collapse an entire tree with the **Option** key held down when clicking on an arrow or in combination with the arrow keys on your keyboard. All subgroups will be impacted by this operation.

**Incrementally by level** Sometimes fully expanding a section of the tree will be more than you want, but you still wish to expand down two or more levels. This can be done by alternating between two different complementary commands:

1. Press → to expand the tree one level.
2. Use the **Edit ▸ Select ▸ Select Subgroups** menu command to move your selection from the main group to all of the items within it that are also groups.
3. You guessed it, → again to expand the second level. Repeat until the tree is expanded enough for your purposes.

**Reveal and hide everything** The menu commands “Expand All” (⌘9) and “Collapse All” (⌘0) in the **View ▸ Outline** submenu will expand or collapse every container in the view at once. Both of these commands work in several areas of the interface, where it is possible to expand or collapse items.

---

<sup>3</sup> Meanwhile the outliner stores its own states, in fact on a per-container basis, making each folder or file group a discrete workspace of its own in terms of what you can see within it.

**Collapse all to current level** Working in a similar fashion to Collapse All, this command will collapse the entire outline below the currently selected item's level. Thus if you have an outline that has six levels of depth, and select a folder on level 3, using this command will completely collapse all items except those at levels one, two and three, which will remain as they were.

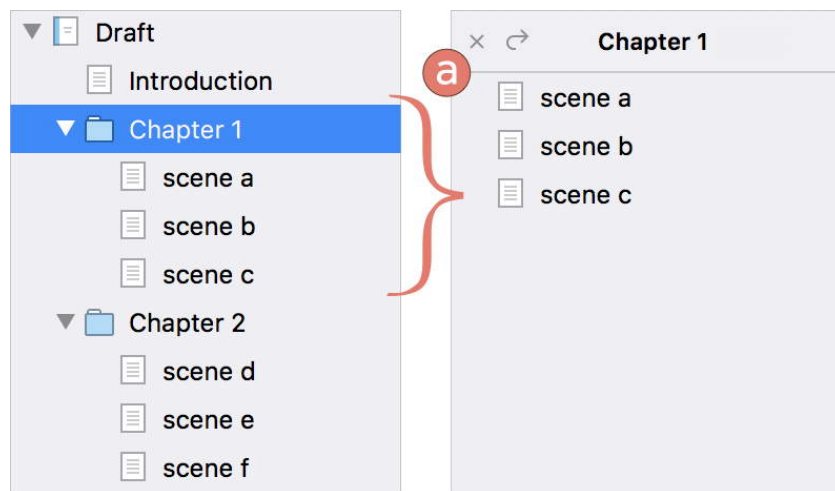
When multiple items are selected, the least indented item in the selection will be used to determine the level by which the tree will be collapsed.

## Hoisting the Binder

If the idea of blotting out everything in your binder, save for the contents of one folder appeals to you (like one chapter in the draft), hoisting is what you're looking for.

To hoist, select a container and use the **View ▸ Outline ▸ Hoist Binder** menu command. While a container is hoisted, the appearance of the binder will change (Figure 6.7). A header bar will be added to the sidebar, printing the name of the container that has been selected along with a few functions (if you're familiar with collections, you might recognise the interface):

- The **×** button marked (a) will unhoist the view, returning to the full binder. You can also use the **View ▸ Outline ▸ Unhoist Binder** menu command.
- The **↶** button beside the close button will load the hoisted container into the main editor—just like clicking on it as a folder would do in the full binder.



**Figure 6.7** Hoisting the binder: before and after.

When you hoist a folder, any containers within that folder will be collapsed or expanded in accordance with how they would appear in the normal binder. However any changes you make to disclosure while the view is hoisted will be

discarded upon return to the full binder, leaving you free to more fully expand sections of the outline that you'd rather leave hidden by default.

### Can the Outliner be Hoisted?

In a sense, the outline and corkboard views are hoisted by their very nature. When you click on a folder in the binder, their contents (and downward in the case of the outliner) are loaded into the editor view, with the name of the container you clicked on printed in the header bar above. If you wish to hoist *within* the view however, to isolate one folder from the rest within an outliner, or to load an index card as a corkboard within that editor, select the items you wish to hoist and use the **Navigate ▶ Open ▶** submenu to select the same editor you're currently using, or press the **⌘O** shortcut.

### Marking Items as Separators

In longer outlines it can prove useful to add visual separators so that you can more easily see landmarks in a large outline as you scroll through it. This is done by marking existing items as being separators, by drawing a shaded box around it. This is an item setting, and as such will be duplicated along with the item, or included as part of a document template (section 7.5).

To mark an item as a separator, select the item and right-click on it, choosing the “Show as Binder Separator(s)” contextual menu toggle.

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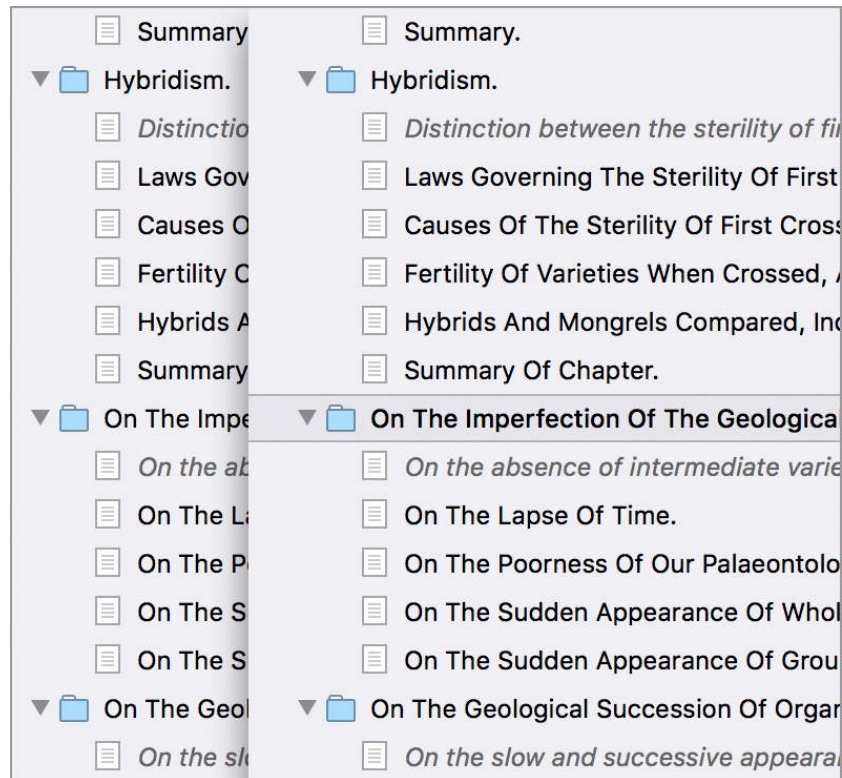
## 6.4 Multiple Selections

A multiple selection is a concept you will encounter throughout this manual, as Scrivener considers selections to be a kind of feature in and of itself. For example, if you select five files in the binder and then navigate elsewhere in the editor, the *selection itself* will be inserted into the history queue, meaning you can click the “back” button in the editor header bar (subsection 8.1.1) to return to your selection later on.

You may also note that the editor header bar, which typically displays the name of the thing you are viewing, prints “Multiple Selection”, with a special icon; dragging that icon will be synonymous with dragging the selected items together—you can even drag the multiple selection icon to another editor header bar to clone the selection into both editors.

There are two basic forms of multiple selection that will act differently in the editor:

1. *A selection of containers*: be they folders or file groups, if the entirety of your selection is comprised of these, then the group views will act as follows:



**Figure 6.8** Marking a significant entry as a separator makes it easy to find later on.

- Corkboards will become stacked ([subsection 8.2.8](#)), so that each container is listed one after the other.
- The Outliner will show the groups with disclosure arrows so you can expand their contents and work with their descendent items.
- Scrivenings mode will display not only the text of the selected containers, but all of their child items as well.

2. *A mixed selection of containers and files:*

- Corkboard will display all of the items one after the other in a single grid or label view.
- Outliner will present a flat list, not allowing the contents of containers to be revealed.

This flat list approach can be used to your advantage, as it means you can readily sort by outliner columns no matter where the items came from initially.

- Scrivenings mode will only work with the text content of the explicitly selected text items.

3. Therefore, if you intend to use one of the above behaviours and are getting the wrong type, then modify your selection accordingly, even if artificially, to achieve that effect. Some might want to just edit the text content of their chapter folders without all of the chapter subdocuments, so the solution is to select one token file anywhere in the binder to trigger the mixed selection case.

In a few ways, Scrivener treats a selection like a *thing*, but it is important to understand what they cannot do. What you are viewing in the editor doesn't "exist" anywhere in the project:

- The main editor view will always display a multiple selection in a group view mode. It is not possible to "turn off" a group view mode, like you can with a folder or text group, because there is nothing behind the multiple selection to edit. If the currently preferred group view mode is single-text, then a multiple selection will fall back to Scrivenings mode.
- Freeform corkboard view cannot be used, because your card placements would have no place to be saved to, and would be lost the moment you clicked anywhere else.
- You will not be able to add new items to the view, nor re-arrange existing items, because their relationship amongst each other does not necessarily correlate with anything in the binder in a linear fashion.
- Items can however be moved *from* a multiple selection. The result of this action won't be to remove it from the selection, but the card will be moved to the location you dropped it to in the binder or other editor.

In all other ways, the editor view can be used as you've learned how to use it. Cards can be filled in on the corkboard, labels can be assigned, you can edit the text of a selection in Scrivenings and outliner columns can be sorted.

### Want to Save a Selection?

With the usefulness selections have in Scrivener, you might want to save them for future use (and remember that History saves them until they eventually roll off of the end of the list). To do so, with the items selected, use the **Documents ▸ Add to Collection ▸ New Collection...** menu command. The collection tab interface will appear above the binder and you can type in a name for your "selection". To recall it in the future, simply visit that collection and select the items within it. Read more about Using Collections ([section 10.2](#)).

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# **All About Files and Folders**





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If you've ever spent a little time organising documents on your computer, you've probably encountered the concept of folders, and how we can use them as ways to store groups of files together. Not only does a folder help us associate those files as being related to a common purpose, they have a very practical result in how the contents of folders are hidden from view until you open them.

Scrivener makes use of a similar approach whereby you have some things that act as “containers” (like folders), that you can put other things into, such as files or even other containers. Where it differs from the traditional approach is in how *anything* can be a container, even other files. This is a more advanced topic that you can read about at your leisure ([section 7.3](#)). Until you're ready for that topic, for now consider the role of folders and files as you are familiar with them, and how that concept could benefit how you arrange the text of your work. Imagine if it were easy to store scenes inside of chapters, or subsections inside of articles, in the same way we can store PDF files into folders on a disk.










If you're looking for the basics of how to use the binder to create new files and folders, refer to Adding New Items ([subsection 6.3.1](#)). In this section we will be taking a deeper look at what files and folders represent and how to use them in your project, rather than the broader management topic of how to add, remove and organise them.

## 7.1 Binder Icons

You’ve seen a small taste of this in the preceding chapter, but there are many binder icons used to show the type of item, and in the case of folder and text documents, hints about their status as well ([Table 7.1](#)).

A new document that you’ve just created will look like an empty sheet of paper until you add a synopsis to it, changing the icon to an index card. If you start typing into the main text editor, the icon will then show a sheet of paper with lines on it. Likewise, folders will display if they have synopsis or text content in the form of a small badge. These visual cues can provide a vital bird’s eye view of how your outline is progressing *beyond* being a mere outline.

**Table 7.1** File and Folder Binder Icons

Icon	Explanation
<b>Text Document Icons</b>	
	An empty text document.
	A synopsis has been added to the document, but nothing has been typed into the main text.
	This text file has text content.
	Scriptwriting documents.
	These variations of the above icons indicate that the text item contains subdocuments, child items indented beneath them.
<b>Folder Document Icons</b>	
	A standard folder document.
	The small index card badge means this folder has a synopsis added to it.
	A printed page badge indicates the folder has main text content.
<b>Snapshot Indicators</b>	
	Any of the above icon variations can be “dog-eared”. When an icon has a flap folded over in the top-right corner, that means the item has snapshots ( <a href="#">section 15.8</a> ) saved for it.

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## 7.2 Titles and Adaptive Naming

The title of an item is featured prominently in every location where items are represented. There are many ways to change the title of an item:

- In the binder, double-click on the item to edit its name. You can also use the **Esc** key to toggle editing mode from the keyboard on and off.
- When viewing the item in the main editor, Quick Reference panel or a Copyholder, you can click into the editor header bar where the title is printed to edit its name (**⌘T**).<sup>1</sup> The **Return** key will bring you back to where you were typing in the editor.
- In the inspector's Notes Tab (section 13.3), the depiction of an index card at the top of the pane can be freely edited.
- If you would like to set the title by using some existing text in the editor, select the text and use the **Documents ▶ Auto-Fill ▶ Set Selected Text as Title** menu command (**⌘T**).

You might be wondering if Scrivener requires you to name each and every item that you put into the binder. As you might expect from such a leading question, the answer is no! In fact it can often be advantageous to leave the title empty (we even have a command for retroactively nuking titles, with **Documents ▶ Auto-Fill ▶ Clear Titles**).

### Upgrading from Scrivener 2

If you've been using the iOS version of Scrivener, you may have already seen this new behaviour in action, and you can probably skip this section. All you really need to know is that Scrivener on the desktop now supports that same method fully, and you can more freely leave items without titles in all contexts.

When in effect, the title will be displayed in a grey italic text treatment (typically used in software to indicate placeholder text), using whatever content it can find to give the item a "handle". Adaptive naming works by checking for available text in a few different places, using a descending list of sources. If a source is lower on the list, that means anything above it will be displayed instead:

1. *The title*: obviously, if you have given an item a name, we'll use that name wherever we can.
2. *The synopsis*: if an item has a synopsis typed in, then the first line of its text will stand in for the title in those places where the synopsis is not otherwise shown.
3. *Main text content*: any text found within the main content area will be used if the item has neither of the above. If your text files start with a heading, this can mean not having to worry much about meaningful names at all.

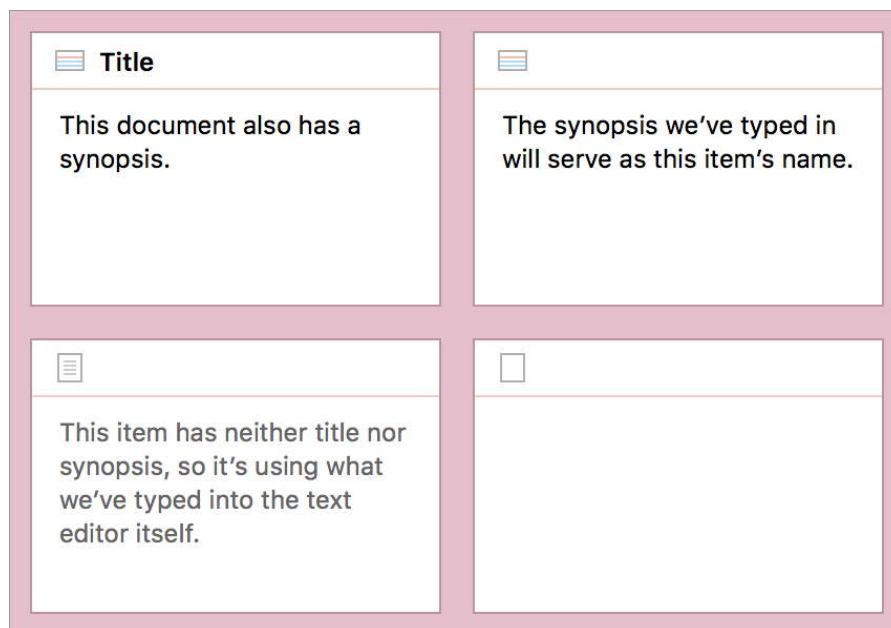
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<sup>1</sup> If you are viewing multiple items in Scrivenings mode, only the latter portion displayed after the colon is editable.

4. *Placeholder text*: finally, if an item has none of the above typed in, then it will simply print “Untitled Document” or “Untitled Folder” in all places other than the corkboard, which itself will display an entirely blank card.

How this information is printed depends upon the context, but in general the rules are simple: if a thing needs to be represented by a line of text (such as in the binder), then preview text will stand in for the title, where it will be printed in grey italic text.

If the view also contains other information (like the synopsis part of the index card on the corkboard or outliner, or the main text itself in Scrivenings mode with **View ▶ Text Editing ▶ Show Titles in Scrivenings** enabled), then the slot ordinarily occupied by the title will either be left blank or will be collapsed.

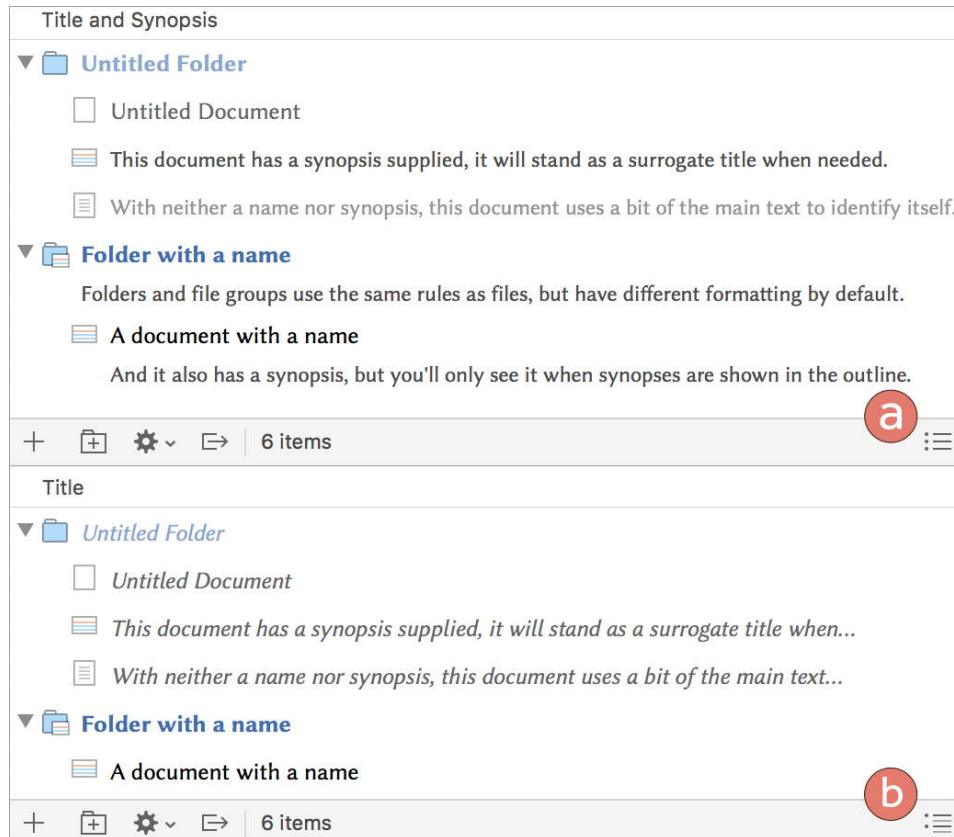


**Figure 7.1** Adaptive item naming in action on the corkboard.

On the corkboard (Figure 7.1), titles will only ever be printed in the title area of the index card if you’ve given the item a title yourself, such as in the top left corner. In the lower left we see the synopsis area filled with text coming from the main editor. If you prefer to use the corkboard as an overview of the text *itself* rather than a place to jot down summaries to yourself, then leaving the cards blank will seamlessly do that for you. Finally on the right we have a card with nothing added to it, and no text written for it.

If you would like to make adaptive synopses permanent, use the **Documents ▶ Auto-Fill ▶ Set Synopsis from Main Text** menu command (⇧⌘⌘I).

How adaptive naming will be calculated in the outliner (Figure 7.2) depends upon whether synopses are being shown within it. Named documents will use a bolder title by default, with the synopses in a smaller and slightly greyer font. If the item lacks a title, the area where the title would normally be printed will be



**Figure 7.2** Adaptive item naming, according to whether synopses are (a) shown or (b) not.

collapsed and just the synopsis will be shown. Finally the synopses itself will use content from the main text only if the document does not have a title.

The binder, editor header bars, text links and other cases where a thing would only have the title to represent it, all follow the same rules used by the outliner when synopses are hidden. E.g. if a document has a synopsis but no title, in a Quick Reference panel ([section 12.6](#)) it will display the first few words of the synopsis as a placeholder title in its header bar.

### Do Adaptive Titles Export?

Adaptive names will be used when exporting individual binder items via the **File** ▶ **Export** ▶ **Files...** menu command. Otherwise, these are not real titles, they are meant to be useful tokens of representation while working in the project. Thus, by default they will not be included in the compiled output as a formal title. This policy can be changed as part of your compile format settings, in the compile format pane ([subsection 24.2.2](#)).

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## 7.3 Folders are Files are Folders

Earlier we discussed how Scrivener uses folders and files like your desktop computer does, but let's take a look at a few important differences between the simple approach used by file systems, and how Scrivener as an outliner works.

To start, we should take a fresh look at what a folder really is in Scrivener:

1. Select a folder in one of your projects by clicking on it in the binder. You'll probably get a corkboard view of its child items or perhaps an outliner view if that is how you have things set up. This is all pretty straight-forward and not too unlike viewing the contents of a folder on your disk, but what happens if you *close* the corkboard?
2. With the folder still selected, click the currently active Group Mode button (you can tell which mode is active by its shaded background) in the main toolbar, the View menu or use the respective keyboard shortcut. This will disable the current group view, bringing us to a blank view with a blinking cursor that looks suspiciously like an empty text document. In fact, that's precisely what it is.
3. Type in some text and see what happens: the folder's icon will have changed, now sporting what looks like a little page of paper in its corner (Figure 7.3).



**Figure 7.3** This folder icon indicates that you've typed text on the folder's text file itself.

Let's try something a little more radical:

1. Right-click on the folder in the binder and select the command, "Convert to File". The icon will change to a stack of papers.
2. Delete the line you wrote in that item and it will turn into a stack of empty papers.
3. Go ahead and right-click and select "Convert to Folder" to get it back the way it was. You didn't lose any information, the only thing that changed is the underlying type of the item, which doesn't mean as much as you might now suspect.

When an item has other items beneath it, but it is a file, it is referred to as a file group (or sometimes "a document with subdocuments", when we're being really formal about it). Fundamentally it can behave as a folder does, you can even use the **View ▶ Corkboard** menu command with a file group selected and view its child

items as index cards. This documentation will often refer to either folders or file groups as “groups” or “containers”, when the distinction does not matter.

If the concept of putting files in files doesn’t make sense yet, try this:

1. Select one of your files in the binder.

You should see its text appear in the editor as you always do.

2. But let’s do the same thing we did earlier with the folder and toggle corkboard view. This time instead of toggling it *off*, we’re toggling it *on*.

It will be empty, but you are now looking at the corkboard for that file.

3. With the focus in the Corkboard, add a new document to it.

An index card should appear, just as if you were adding items to a folder. In the binder, you’ll notice that the icon for this file has changed to the aforementioned stack of paper. You can do this with any kind of file by the way, you can even organise PDFs on one master PDF’s corkboard.

What is all of this flexibility good for? You don’t have to be thinking in terms of constrictive structural elements (like chapters and sections and scene) as you flesh out the skeleton for your book from fragments of text and snippets of dialogue. You can add items as you go, build out new corkboards and change things to folders or back to files once a structure begins to emerge—it’s up to you. Scrivener lets you work the way you find most comfortable.

In Scrivener, the concept of what is a group is fluid. It’s an important concept to grasp, because organising your book will inevitably mean a hierarchy of documents, and wherever that hierarchy takes you it will take so in the form of folders, or their cousins, the file group. The concept of hierarchy is important, because it means you can keep the parts of the book you aren’t currently working on tucked away, and that means you can feel free to break things down as far as you want, no matter how many hundreds of items you make in the binder, if you sort things into folders (or file groups!) you can always keep the clutter at bay. For more, read *What is Outlining?* ([section 6.1](#)).

### 7.3.1 Tips for Using View Modes with Folders and Files

When toggling view mode settings on files, folders and file groups, there are a few special cases to keep in mind:

- When the view mode has been explicitly set to single text file mode—if you turn off the corkboard to edit a folder’s text—then the view mode will remain text-only until changed, no matter what type of item you click on in the binder.
- There is no underlying item to edit when selecting more than one thing in the binder at once, so if the preferred group view mode is *off* as described



in the previous point, then Scrivenings mode will be used as a fallback for text, and the corkboard for media items.

- It is possible to lock a view mode for a specific folder ([subsection 12.2.2](#)), meaning whenever you revisit the container in the future it will always override the preferred view mode while viewing it (but it won't change your preference in doing so).
- If you've been experimenting along the way, you might have noticed that files with subdocuments are treated differently from folders in that they go on acting as files when you click on them in the binder. If you'd prefer all containers to act alike in Scrivener, try the **Treat all documents with subdocuments as folders** option, in the Behaviors: Folders & Files settings pane ([subsection B.4.5](#)). This opens up additional features as well, otherwise exclusive to folders.

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## 7.4 Custom Icons

Custom icons can be used to embellish the appearance of your binder items. Anything can have a custom icon, even the three root folders: Draft, Research, and Trash.

There are a few ways you can change the icon for an item:

- Select one or more items in the binder sidebar, corkboard or outliner, and use the **Documents ▶ Change Icon** submenu. This also works while viewing an item in the main editor, or within a Scrivenings session.
- Access the item's contextual menu, and use the "Change Icon" submenu.
- Use the quick icon selection menu by holding down the **Option** key when right-clicking on it.
- If your Mac comes equipped with a Touch Bar, you can add the Icon button to the binder and group contexts for easy visual two-touch access to the icon list.

The icon menu is organised into two major parts. The first part displays up to five of the most recent icon selections you've made, so you can quickly use them again (if you have never used the feature before, you won't see this yet). The recent icon list is retained between sessions, and is universal to all of your projects. The second section in the menu displays *sets* of icons, grouped together to save space, and finally all of the remaining ungrouped icons that are available.

To remove a custom icon assignment, resetting it to its default binder icon, select **Documents ▶ Change Icon ▶ Reset Icon to Default**, located at the top of the menu.



**Setting an icon over and over?**

If you find yourself using a particular icon frequently, you might wish to make a document template ([subsection 7.5.1](#)) for it, so that you do not have to constantly re-apply icons to new files or folders. Additionally, since these are all located in the main application menu, you can make use of custom keyboard shortcuts ([section A.1](#)) to assign a hot key to a specific icon.

### 7.4.1 Creating Your Own Icons

In adding your own icons to Scrivener you have the choice of installing them into individual projects or making them available to all of the projects you use. To add an icon

1. Load the icon manager with **Documents ▶ Change Icon ▶ Manage Custom Icons...**
2. Then either:
  - a) For global icons made available to all projects, click the **+** button below the lower table. Icons installed this way will only be visible while using this computer account.
  - b) For adding icons to the current project use the **+** button below the upper table. These will be visible no matter where you take the project, but will only be available to that project.

Naturally, if you install them into both panes then they will be available wherever you go and to every project.

3. Find the graphics file you wish to convert to an icon with the file chooser, and click the **Open** button. If the graphics file is too large or the wrong shape, Scrivener will automatically resize it for you.

You can also drag and drop images into either list to import icons.

#### Tips for Sharp Icons

After you add an icon to the manager, what you see in the window is what you will see in the binder and other views. If the icon looks distorted or blurry to you in this window, then it will look that way everywhere. You can remove a bad attempt and try again using the following tips for creating sharp and great looking icons:

- Common problems are files with lots of white or transparent padding around them. Open these files in a graphics editor (even Preview will do for simple cropping) and use the software to cut out the excess padding.

- Transparent backgrounds will always be best, so that the icon blends in with the various elements of the user interface where it will appear.
- The optimal icon size is 90 px × 90 px. This will ensure they look good on all devices and platforms, including iOS. If that is not a concern:
  - For icons on high-resolution screens, use 32 px × 32 px.
  - For icons on low-resolution screens, use 16 px × 16 px. In most cases it is better to use high-resolution icons, as the amount of scaling down to 16px will be minimal.
- These dimensions refer to the literal size of the graphic rather than the visual part of it. The built-in Scrivener icons are a few pixels smaller than that to make space for some of the taller icons. Therefore if you want your custom icons to fit in with the stock icons, it is often best to size them a few pixels smaller with a little transparent padding around the graphic.

### Creating High-Resolution Custom Icons

If you intend for your icons to look good on both Retina and standard displays you will need to supply two different icons (16px square for standard; 32px square (at 144 DPI) for high resolution). Importing a dual-purpose icon is simple:

- Name the low-resolution version normally, like “Name of Icon.jpg” (you will see “Name of Icon” in the interface).
- Name the high-resolution version with the same name, only adding “@2x” to the end of the name, like “Name of Icon@2x.jpg”.
- When both are imported simultaneously into the icon manager, they will be combined into a icon for you. The appropriate version will display depending upon your display resolution.

#### **These icons will not appear on iOS**

Although the above instructions will produce the best results on the desktop versions of Scrivener, they will not appear on iOS when created this way. If it is important that you see your icons on that platform, you’ll want to use the larger 90 px × 90 px icon size. The other platforms will need to resize the images down to size and this can result in a minor loss of quality.

### Creating Your Own Icon Sets

How you name your custom icons will determine whether or not they are grouped together as a set in the custom icon menu (like the built-in “Flag” set).

The format for this naming convention is “Category (Icon Name)”, such as “Flag (Blue)”. This causes this particular icon to be grouped together with the Flag set and displayed in the menu as “Blue”.

## Making Icons iOS Compatible

Naturally, icons that are installed on your computer will not appear on iOS if you take your project to that platform. However if you load your icons into the project, it will use them if it can ([section 7.4.2](#)).

The iOS version of Scrivener uses a different size icon than either macOS or Windows versions. This can mean that making an icon that looks crisp and clean between all platforms isn’t viable, but a reasonable compromise can be made by using the larger 90 px × 90 px size and letting each system downsize it dynamically for you.

Graphics that are too small, such as those that came from older versions of Scrivener, cannot be displayed on iOS without considerable loss of quality, and so they will not be displayed.

## Icons from Other Sources

### Using Mac Finder Icons

Many icon packs for the Mac are distributed as Finder icons. If you would like to use an icon that you have seen in the Finder, the easiest way to create a custom icon for it is to follow these steps:

1. Select a file in the Finder that has this icon.
2. Press **⌘I** to get info on that file.
3. Click once in the small icon in the upper-left corner of the info palette. You will see a halo surround it when it is properly selected.
4. Press **⌘C** to copy the icon.
5. Open Preview.app and press **⌘N** to create a new file off of the clipboard.
6. You will probably see several options to choose from in the sidebar. Select the 32 pixel 144 DPI image for retina, 16 pixel 72 DPI version for standard (you’ll want both if you are making a hybrid icon as described above)—or if you wish to create an iOS compatible icon, choose the 128 pixel 72 DPI version.
7. Press **⌘C** once again to copy the single icon choice; and then **⌘N** to create another new document from the clipboard with just this version of the icon.

8. If you chose the 128 pixel version, use the **Tools ▶ Adjust Size...** command to resample the graphic down to 90 px × 90 px. Otherwise, you can skip this step.
9. Now you can save this icon to your Desktop or some other convenient location. It is best to use the PNG or TIFF format, leaving the “Alpha” box checked.

### Using Emoji for Icons

You can use Emoji, or indeed any character at all including Unicode symbols or regular letters and numbers, as icons in Scrivener. These will be visible on iOS as well, and owing to their scalable size, will be crisp on all screen resolutions. To create an icon from a character:

1. Select the binder item you wish to apply the new icon to.
2. Use the **Documents ▶ Change Icon ▶ Icon from Text...** menu command.
3. Insert the character you wish to have turned into an icon. (The “Emoji & Symbols” palette will be opened for your convenience, simply double-click on the icon you want to insert it into the text field.)
4. Click the **OK** button.

Text based icons will be listed in the **Documents ▶ Change Icon ▶** submenu, under recently used icons, and will also be listed in a special submenu, **Text Based Icons ▶**, which will list all text based icons in use in the project. These kinds of icons can only be added to individual projects.

If you’d like to make them available to other projects you can drag an example item from one binder to another to bring it in—and of course you can add such files to a starter project template so your favourites are always easily available.

Custom text icons that are no longer in use by the project will be removed from the menu after Scrivener is closed.

## 7.4.2 Managing Your Icons

### Icon Assignments are “Sticky”

It is good to keep in mind that when you assign a custom icon to an item, it will remain assigned to that icon *by name* even if an icon by that name cannot be located. This is what keeps your assignments safe no matter where the project is taken, but it also means that when you rename or delete icons and then later add them back or change their names to what they were, old items that had been assigned to them will start showing these icons again.

## Renaming icons

You are not stuck with an icon name if you don't like it, but take the caution above to heart. If you have already used this icon for some time in your projects, all of those items referring to it will lose the assignment (unless you change the name back), as they will only ever be looking for the old file name on the disk.

1. Open the icon manager with **Documents ▶ Change Icon ▶ Manage Custom Icons...**
2. Double-click on the name of the icon you wish to rename.

Take care to not modify or remove the extension of the icon unless you know what you are doing.

## Removing icons

You can remove an icon from either the current project or globally from your computer. This will not strip the assignments to that icon from other projects, and so if you ever change your mind and add the icon back, you'll find all of those items go right back to working the way they used to.

1. Open the icon manager with **Documents ▶ Change Icon ▶ Manage Custom Icons...**
2. Select the icon(s) you wish to delete (**Shift** and **Command** work here).
3. Click the respective **—** button beneath the table associated with the selected icons.

## Copying Icons Between Global and Project

Icons can be dragged between the lower and upper sections individually, or *en masse*. Icons in the lower list will be available to all of your projects; past, present and future. Icons in the top list will only be visible to *that* project; however they can be duplicates of icons that are in the lower list. If you've created an icon for a project, and later decide you'd like to use it everywhere, you can simply drag and drop it into the lower table. If you try to drag an icon with an identical name from one list to another, you will be informed of the collision, and confirmation will be required before it is replaced.

When Scrivener loads your project, it first checks within the project itself for any necessary icons, then it checks the computer. This means any duplicate names (not graphics) in the top list will override any names in the bottom list.

To move an icon *between* projects, you would need to copy the icon to the global list, switch to the other project and then copy it from the global list into that project. You could remove the icon from the global list if that point if you wanted to.

### Custom Icon Portability

The final thing to consider is whether or not icons will be visible off of your computer. If you've been adding icons to your computer, in the lower half of the pane, then when you take your project file to another computer all of those icons will not be displayed. They will still be assigned, but since Scrivener cannot locate any replacement icons, they will simply be ignored until you return to the original computer.

So when working on multiple computers, it is good idea to drag your global icon list into the project list above. This way your icons will be available wherever you go, and once you are on the second computer, you can drag them back into *its* global list, installing them on that computer as well.

When collaborating with other individuals, it is a good idea to install custom icons into the project package. This way everyone can see and use them.

### Icons on the Disk

Scrivener checks a couple of locations for files when working with icons, meaning you can manage icons yourself directly with a file manager if you prefer to do so over the user interface in Scrivener. Global icons will be located in Scrivener's support folder, use the **Scrivener ▶ Reveal Support Folder in Finder** menu command, and then double-click on the "Icons" folder.

For project-specific icons, they will be stored directly in the project itself. With the project closed, right-click on the project file in Finder and select "Show Package Contents" to view the project's internal folder and file structure and double-click the "Icons" subfolder within the project's ".scriv" folder to view your icons directly. As always, take the precaution of backing up your project prior to editing its internal files directly.

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## 7.5 Document Templates

If you have ever found yourself creating items in the binder and repetitively changing their settings, or wondered how our built-in templates have those handy sheets you can use to create character dossiers and such, then the Document Template feature may end up saving you a lot of time with a little set up.

Templates give you the ability to designate a set of binder items that can be used to create copies of themselves elsewhere in the binder. Much as with the **Documents ▶ Duplicate** commands, nearly every aspect of the item will be faithfully reproduced when you use the template.

As a feature of your project, templates dwell within its binder, and indeed they are otherwise normal documents right in the mix with everything else in the

project.<sup>2</sup> Since document templates are binder items, they tap into the full range of customisation and connectivity that all items share. Here are a few examples:

- The various metadata, notes, keywords, custom icon, bookmarks, synopsis, and of course any text in the main editor.<sup>3</sup>
- Groups in the templates folder will create copies of their children as well, making for a simple way to produce boilerplate outline structure.
- Compile settings that have been applied to the item will be carried along, such as its Section Type ([section 7.6](#)) as well as whether it is set to be included in the compiled product at all. (E.g. you could create a “Chapter Notes” template, meant to be used in the Draft but not included in the compiled output.)
- Functional settings, such as which view mode ([subsection 12.2.2](#)) a folder should use when you click on it in the binder, writing goals, their settings and more.
- In short, anything you can do to a binder item can be established as a starting point for new items.

### 7.5.1 Using Document Templates

Unless you started with a project that already has a document template folder designated, the first thing you will need to do is create a place for your templates, and then tell the project that is what you wish to use this folder for:

#### Setting a Document Template Folder

Each project can only have one template folder at a time. To set it up, you’ll need a folder to start with; it can be empty or already contain a few items you wish to use as templates (the only stipulation is that it must be outside of the Draft folder). Once you’ve created a folder, it will need to be designated it as being the official templates folder for this project:

1. Open project settings with the **Project ▶ Project Settings...** menu command (**⌘⌘**).
2. Click on the Special Folders tab.
3. Using the dropdown menu in the **Templates Folder** section, select the group you wish to use.

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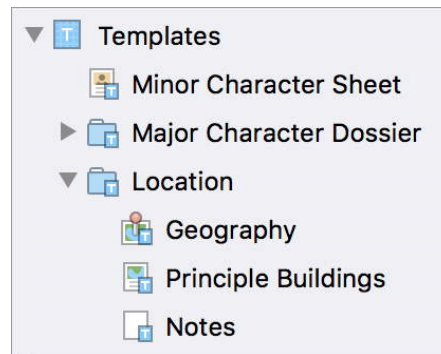
<sup>2</sup> A notable exception are Shared Templates, which are in fact files on the disk that all of your projects can use as global document templates ([subsection 7.5.3](#)).

<sup>3</sup> Snapshots will not be reproduced into the duplicated copy.



4. Click the **OK** button.

The binder icon for your designated templates folder will change to indicate its status, and all of the items indented beneath it will have a small blue “T” badge added to their icons ([Figure 7.4](#)). This badge will be present anywhere its icon may be used, helping you distinguish them from ordinary items in lists like search results or collections.



**Figure 7.4** Example of a Templates Folder with some file and folder-based templates.

Some of the built-in project templates will come with a template folder already set up for you. Keep an eye out for the special folder icon; wherever you see it, you can add your own files to it to expand the template capabilities of the project, and change or remove the examples we’ve provided.

#### **Can I save my starter templates for future use?**

If you accumulate a collection of templates you often use, you might wish to create your own project template ([subsection 5.4.3](#)) so that everything is all ready to go the next time you start a new work. You might also be interested in the ability to store template files on the disk, instantly available to all projects ([subsection 7.5.3](#)).

## **Creating Document Templates**

Creating new templates is as easy as creating a normal file or folder item in the binder. There is nothing special about these items, save for their position within the designated templates folder, meaning you can change their status as templates by dragging items in or out of this folder.

Any type of file that you can add to the binder (which is just about everything) can become a template. For many types of files this wouldn’t serve much purpose—who needs dozens of copies of the same PDF document—but for editable documents, like Scapple boards or spreadsheet starter files, the template feature can be of considerable use.



**How can I give templates their own default text formatting?**

To cause a template to have different default formatting than what is standard for the project (or global Settings), simply add a small amount of placeholder text into the document template, and format it the way you would prefer. Leave the placeholder text selected; since text selections are copied to the new item, you'll only need to type over the placeholder text, rather than manually selecting and deleting it every time.

**Creating New Items from Templates**

With an active template folder and a few starter items to work with, you can create copies of these items elsewhere in the project via the **Project ▶ New From Template** submenu, or by using the green **+** button in the toolbar. The items in either menu will be arranged precisely as they have been organised in the binder, with groups becoming further submenus. Creating new items from templates will follow all of the same rules and behaviours used to create built-in types like text files and folders.

If you have a Mac with a Touch Bar, document templates will be appended to the **Add** button, which by default appears on the far right hand side of the Touch Bar in all applicable contexts.

Here are some additional tips & behaviours to be aware of:

- If you select a group from the menu, it and all of its child items, will be created in the selected position.
- The order of items within the template folder will determine how they appear in the menu, thus you can organise the menu directly by changing the position of items within the templates folder.
- The topmost template item in the template folder is a special spot as it will be given a keyboard shortcut, **⌘⌥⌘ N**.
- Document templates have no connection with the item that they were modelled after. It is safe to delete or modify a template without any repercussions on the items that have been created from it.
- You can move items out of the template folder that are not being actively used. If you ever need them again, just move them back in.

It is also possible to assign your own keyboard shortcuts to other items, using the instructions in Custom Keyboard Shortcuts ([section A.1](#)).

**Clearing Document Template Folder**

Use the following instructions to clear the template folder setting:

1. Open project settings with the **Project ▶ Project Settings...** menu command (**⌘⌘,**).
2. Click on the Special Folders tab.
3. Using the dropdown menu in the **Templates Folder** section to select “No Templates Folder”, at the very top of the menu.
4. Click the **OK** button.

This action will not delete anything in your project. It will merely remove the special status from the previously designated templates folder. It is thus safe to switch between different folders, perhaps to facilitate different phases within the project’s lifespan.

## 7.5.2 Default Subdocument Template

Something you may have noticed, from a few of the built-in project templates we provide, is that when you add items to some folders they use a specific document template automatically (e.g. the “Characters” folder in the Novel template).

To set up a folder to work this way:

1. Select the folder in the binder, corkboard or outliner (even the special root folders Draft and Research can be set).
2. Use the **Documents ▶ Default Template for Subdocuments** submenu, and select the desired template for this folder’s new text items.

Assigning a default template to a container will modify all of Scrivener’s ordinary methods for creating *text files* within it.<sup>4</sup> This applies to almost all of the actions that create new blank text files, but no actions which would result in an item that already has an explicit identity, such as choosing to create another document template specifically. Here are the exceptions to when the document template would be used:

- If you import a pre-existing text file into this folder, then it be imported as ordinary text.
- When right-clicking on the folder and using the **Add ▶ New Text** command explicitly, you will get precisely what you asked for, a normal text item.

## Resetting Subdocuments to Defaults

To remove a default subdocument template assignment from a folder:

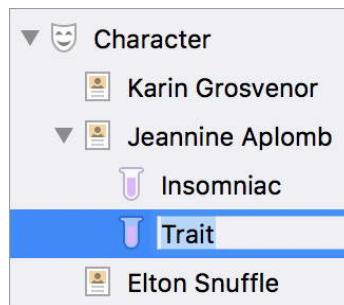
---

<sup>4</sup> That the default template might be a *folder* is aside from that, it would still be methods for creating new files that is overridden.

1. Select the folder in the binder, corkboard or outliner.
2. Use the **Documents ▸ Default Template for Subdocuments** submenu and select the “Text” entry at the top.

## Cascading Default Templates

Each folder (or file group as the case may be) can have its own default type assignment. Where subgroups are concerned, the default type “cascades” into all subgroups, no matter how deeply nested. The exception to this is when a subgroup within that hierarchy has its own default template assigned.



**Figure 7.5** A demonstration of multiple subdocument templates in action.

In the provided illustration (Figure 7.5), a container called “Character” has been set up to use a “Character Sheet” template as its default subdocument template. Adding a new item to this container will result in the “Character Sheet” template style. If that was all that had been configured, these character sheets would create further character sheets beneath them, on account of the cascading rule. However in this case they have been set up as part of their template definition to use the “Trait” document template for their child items. Thus it *overrides* the default supplied by the “Character” folder. Any new items created within them will automatically be “Traits”.

The subdocument default setting is itself something that will be duplicated along with the rest of the template, and thus allow quick scaffolding of common types.

### Returning to default text at a deeper level

It is not possible to select the normal text item as a default subdocument template. For cases where you wish to have a default template at only certain levels, but then revert to regular text documents at all deeper levels, the best approach will be to create a template that is otherwise left alone as a normal text item, that you can select as a default from the menu.

### 7.5.3 Shared Templates on the Disk

For cases where you would like to provide a set of default file types for all of the projects you use, the shared templates folder might be your best bet. This feature keeps watch of a specified folder on your disk, into which you can place any files that are valid to be imported into Scrivener.

1. In the General: Shared Templates settings pane ([subsection B.2.7](#)), click the **Choose...** button.
2. Select the folder you wish to place your shared template files within.

You should now see any files you place into this folder appear within the **Project ▶ New from Template** submenu, below any templates found within that project, if applicable.

The important caveat is that unlike document templates that are housed within the binder of a project, they will of course not be proper Scrivener binder items, and their usage mimics more the process of importing a file into the binder. So if the purpose of your template is to set metadata or set up the editor a certain way, these will not provide a solution for you.

If for whatever reason you no longer want to use a shared templates folder, you can click the **Clear** button (alongside the button that reveals the folder in Finder) to remove the assignment.

### 7.5.4 Copying Templates Between Projects

If you would like to copy some templates you created into another project, simply drag and drop the templates folder (or individual items from one template folder into another) between open project binders.

Scrivener will not copy the templates folder *setting* across, so if you are copying the entire folder, you will need to set it up ([section 7.5.1](#)) after copying it.

[Return to chapter](#) ↗

## 7.6 Section Types

Section Types are a fundamental component to how Scrivener works; they directly correlate to how your work will be formatted when you export it, in a process we call “compiling”. Despite being primarily an export tool, they are something you will want to introduce yourself to early on, because on *this* side of the project, where it comes to pure writing and not worrying about formatting, you will still want to be aware of them as a way of categorising elements of your work into how we will think of them as components of a book, magazine article, thesis or whatever it is you plan to write.

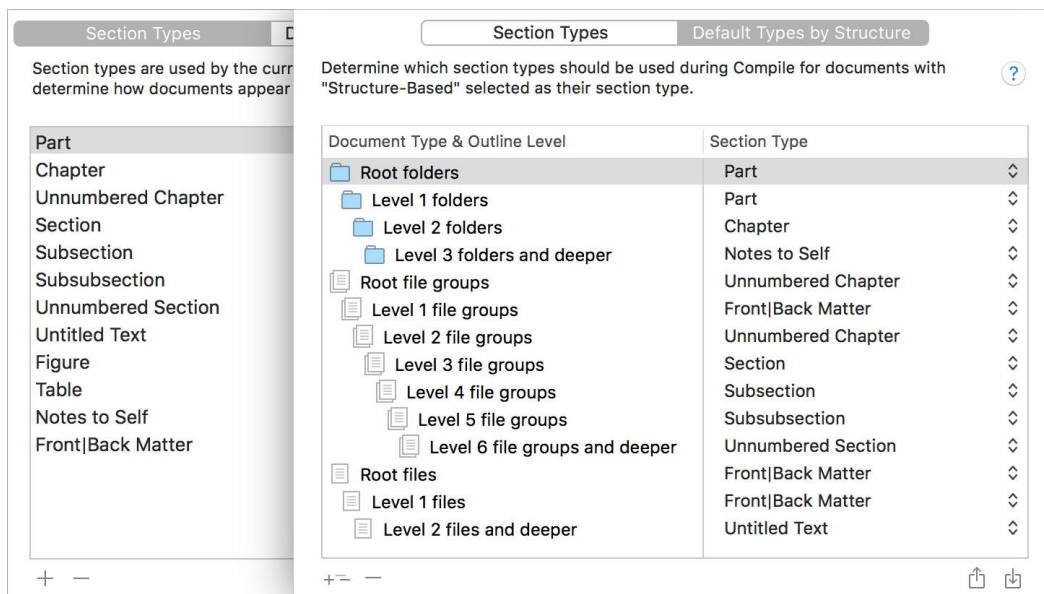
To use an example from a novel, we are thinking less of how a chapter break should look, or how a chunk of text in a scene should look, and thinking more

on the simple fact that there *will be* chapter breaks and scene text (and probably a few other elements such as these).

### Shouldn't the software do this for me?

In a word, yes. All of our built-in project templates have been designed with a basic spectrum of types, all wired up to use those types seamlessly in their compile settings. Nevertheless, this will probably be good reading to bookmark for such a time where you want to modify those templates or make your own projects, you will know how they work and what to change.

## 7.6.1 Overview of Section Types in Practice



**Figure 7.6** Section Types: example of a non-fiction oriented project with sub-sections &c.

Figure 7.6 illustrates some example settings from a project with several types created in the list within the first tab (on the left). These are the sorts of types you might find in a rather involved technical document, similar to the user manual you are reading. The second tab (on the right) shows how some of these types will be automatically applied to the outline structure of such a project. To point out a few details:

- The “root” level refers to the top of the binder, which is technically outside of the draft. These levels will not typically be compiled, but it is still possible to assign types to them as they may serve some purpose in compilation or other uses (for example you will often keep front and back matter material in separate folders outside of the draft).

- Folders in this example are defined as having three functional levels, “Parts”, “Chapters” and “Notes to Self”. This project has been designed to make use of file groups for all major and minor sections within the work. We can imagine that the 3rd level folder type would be used to contain drafting and editing notes that will be set up to be ignored by the compiler—not printed in the final output.
- Our file groups start out as front or back matter, and then are used to print unnumbered sections at the same level that chapter folders would exist, giving us the flexibility of having a section type that doesn’t impact chapter numbering, and potentially won’t even be in the table of contents. Beyond that point, file groups turn into sections, subsections and so forth until finally ending as unnumbered sections again.
- You might notice some types in the list on the left are not applied automatically to the outline, like the Figure and Table sections. These are meant to be applied manually, or perhaps as defined by document templates ([section 7.5](#)), as you work.
- Text documents operate as front and back matter sections when at the top of the draft outline (we could imagine a preface being in a single file for instance), and at all levels deeper they print straight text with no titling—thus their separations in the output might even be invisible to the reader, giving you a greater depth of insight into the book structure than is necessary for reading it.

For a more detailed look into how these settings work and what we mean by “levels”, refer to the documentation on the Section Types tab of Project Settings ([section C.2](#)).

Let’s take a look at how our example will look when applied to some material in a hypothetical draft folder. We will use an outliner view ([section 8.3](#)) with the “Section Types” column visible ([Figure 7.7](#)). Recalling that we have the “Part” type assigned to “Level 1 folders”, and “Chapter” assigned to “Level 2 folders”, we can see where the folder named “Red Book” is on level one and thus acting as a “Part”, while the nested folder beneath it on level two, “The Role of Colour in Symbolism” is automatically assigned to act as a “Chapter”.

Italicised text in this column indicates assignments made automatically by your settings; they are using what we refer to as “structure-based” settings. The two examples in regular font, “Table” and “Figure”, have been manually applied to these items, overriding what they would have been otherwise, “Untitled Text”.

Would you like to use these section types as a starting point for your own project, or maybe just to experiment with the settings we’ve discussed? Download the extras pack ([Appendix G](#)) from our website, and look for the file called “1-section\_types-technical\_book.scrtypes”. Refer to the instructions on importing section types ([subsection C.2.4](#)) to bring them into your project.

Title	Section Type	
<input type="checkbox"/> Preface	<i>Front/Back Matter</i>	▼
▼ <input type="checkbox"/> Red Book	<i>Part</i>	▼
▼ <input type="checkbox"/> The Role of Colour in Symbolism	<i>Chapter</i>	▼
▼ <input type="checkbox"/> Section level document	<i>Section</i>	▼
▼ <input type="checkbox"/> Subsection level document	<i>Subsection</i>	▼
▼ <input type="checkbox"/> Subsubsection level document	<i>Subsubsection</i>	▼
<input type="checkbox"/> Opening text	<i>Untitled Text</i>	▼
<input type="checkbox"/> Table of something	<i>Table</i>	▼
<input type="checkbox"/> More text in this subsection	<i>Untitled Text</i>	▼
<input type="checkbox"/> A figure	<i>Figure</i>	▼
<input type="checkbox"/> Conclusions	<i>Untitled Text</i>	▼
▼ <input type="checkbox"/> Interlude	<i>Unnumbered Chapter</i>	▼
<input type="checkbox"/> Introduction	<i>Untitled Text</i>	▼
▼ <input type="checkbox"/> Another section	<i>Section</i>	▼
<input type="checkbox"/> And so forth...	<i>Untitled Text</i>	▼

Figure 7.7 Some example binder items using the structure defined earlier.

## 7.6.2 Applying Section Types Manually

We looked into setting up your binder structure to use Section Types automatically, but sometimes you’ll need to override these settings. There are three ways to change a section type, one of which is suitable for adjusting many items at once. All three methods use the same core menu layout, so we’ll take a look at that first (in the meanwhile, try right-clicking on any item in the binder and examining its “Section Types” submenu, to follow along):

**Structure-Based** This is a built-in option that causes the item to inherit its type based on the project’s settings. If for example the project is set up so that all folders are assigned to the “Chapter” type, then using this setting on a folder would cause it to act like a chapter—if we converted that item to a file, then it would probably inherit a different section type. When items are set this way, the name of the type they are assigned to is displayed in grey italic text.

If the structure-based assignment is inherited from a parent folder of the item (see Default Subdocument Type, below), rather than the global project settings, then the name of the folder making that override will be indicated in the Section Type selection dropdown menu. E.g. if a folder named “Glossary” overrides the section type layout for its child items to “Glossary Entry”, then when examining the section type dropdown for one of these files, it will read “Structure-Based (from ‘Glossary’)”.



### Upgrading from Scrivener 2

If you've upgraded your project from an older version of Scrivener, any documents that had their "Compile As-Is" checkbox enabled will be automatically assigned to a "N/A" type. In the updated projects default compile settings, this section type will be assigned to the "As-Is" layout, causing it to act as it did before. Refer to the Section Types, Page Breaks and As-Is ([section F.2](#)) appendix for more information on how your projects will upgrade to this new system.

**Listing of project section types** The next part of the selection menu will contain a list of all section types defined in the first tab of project settings. Choose one to manually assign a type to the item no matter where you put it in the draft outline. Manually assigned types will appear in black regular text, as opposed to grey italic text.

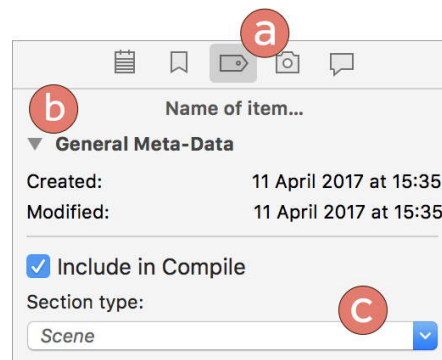
**Default Subdocument Type** This portion of the menu only appears when viewing a folder or file group. Choosing a defined type will cause all of its child items (and their child items and so on, until another group changes the subdocument default) to be assigned to a particular type, regardless of project settings.

The default, "Structure-Based", will cause all child items to use either project settings or any default subdocument types set from folders at a higher level.

**Edit...** Brings you to the Section Types project settings pane ([section C.2](#)).

Now with the choices themselves out of the way, let's take a look at the three places where you can make use of them.

### In the Inspector



**Figure 7.8** The inspector is a handy way to view and adjust the section types of individual items.



As shown in [Figure 7.8](#):

- a) Click the Metadata inspector tab ([section 13.5](#)).
- b) Expand the “General Metadata” section if necessary.
- c) Click the dropdown control to open the section type menu.

### In the Outliner

As we have seen previously ([Figure 7.7](#)), the outline view with the “Section Type” column added to it (use the **View ▶ Outliner Options ▶ Section Type** menu command if you don’t see it) is a great way to get an overview of the type assignments for large groups of items. To change an assignment for an item, click into the section type cell for that item’s row and make your selection from the menu.

### With the Contextual Menu

When you need to change the section type assignment for many items at once, the right-click contextual menu is the way to do it:

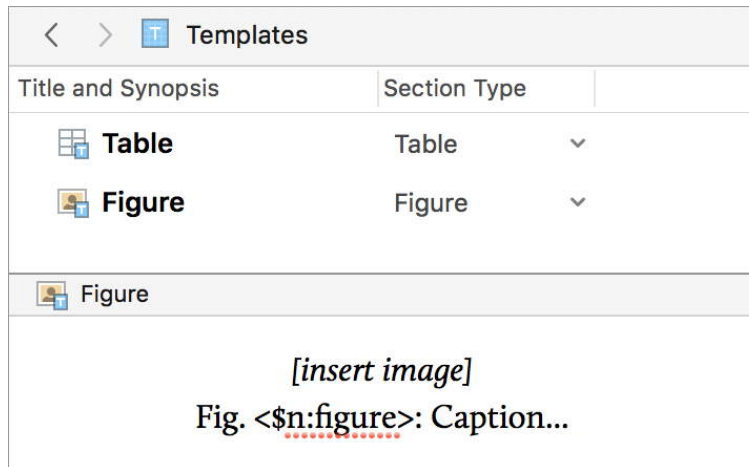
1. Select the items you wish to change in any group view or in the binder sidebar.
2. Right-click on the selection, and use the “Section Type” submenu to change their type.

When you have a mixed selection, the “Default Subdocument Type” portion of the menu will never be shown. Keep your selections confined to containers of any type if you need access to it.

## 7.6.3 Combining Section Types with Document Templates

Although you typically won’t have to bother with section types outside of the draft folder, document templates ([section 7.5](#)) are one place where they can prove useful. When you use a document template with a manually applied section type, newly create documents from it will also be so assigned. Here are a few examples of this concept:

- From our earlier example, we had a “Table” and “Figure” section type. Instead of setting that manually every time we need to insert a figure, we could instead use a document template, which would also set a custom icon, a keyword so they can be easily gathered by search and maybe with even a little boilerplate text like a place to paste in the image with a styled caption all set up ([Figure 7.9](#)).



**Figure 7.9** A few document templates with predefined section types, including some boilerplate, displayed in the lower half.

- Templates that are containers can also have a default subdocument type assigned to them. If you typically need areas of your book to function differently from what is standard, this can be a good trick for doing so.

#### See Also...

- Section Types ([section 7.6](#)): a basic introduction to the usage of section types in a project.
- Project Settings ([section C.2](#)): how to set up section types in your project settings, and optionally configure how they will be automatically assigned to items in the outline structure.
- Section Layouts ([section 23.3](#)): how they will end up being used when compiling your draft to a final format.
- You can search the project for all documents of a particular type with Project Search ([section 11.1](#)), and filter the outliner and corkboard likewise ([subsection 11.4.3](#)).
- If you'd prefer a more hands-on approach, the Interactive Tutorial, available from the **Help** menu, also contains a step-by-step guide to building a simple set of section types and then learning how to compile with them. We also have video tutorials available [on our site](#).

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Part II

# Preparation

The pages are still blank, but there is a miraculous feeling of the words being there, written in invisible ink and clamoring to become visible.

Vladimir Nabokov

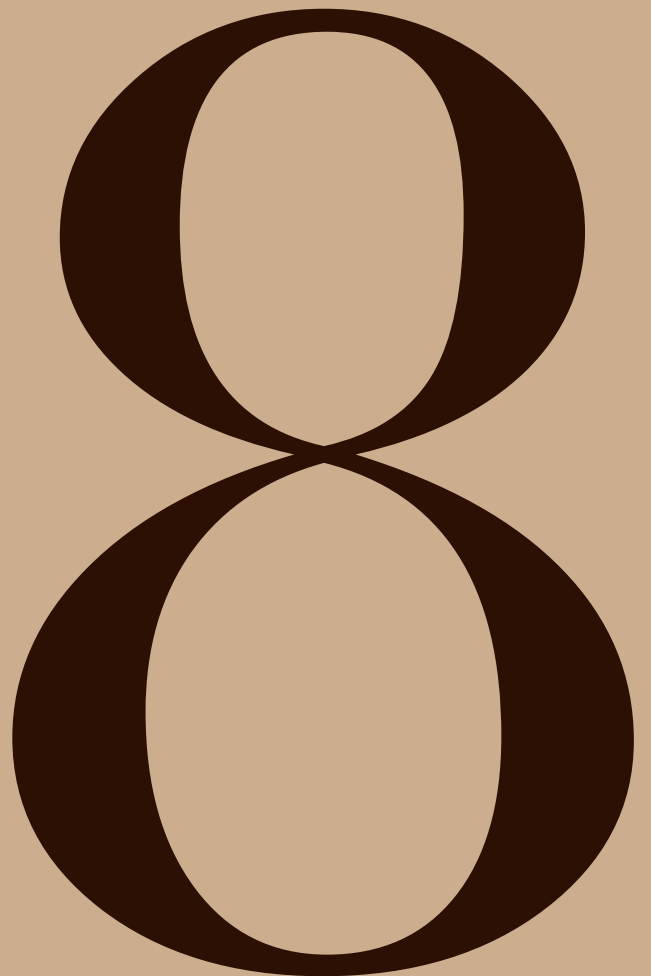
A driving goal behind Scrivener is to be your first stop when a new major project is embarked upon. Much of its design is pitched toward tools that address the early phases of a writing project—when you’re still putting together basic ideas and investigatory research and you need tools that can be as vague as you are, tools that can, as you refine your ideas, become richer and more attuned to the intricacies of your work in progress.

Another Scrivener principle is that what works best for your readers and even your editor might not work best for you as a writer. As writers, we see the text in a different way, and we have different demands on how we organise that text. A formal table of contents is great for a reader, but is it the best tool for a writer? What if you could have your own table of contents, one that evolved out of the structure of the work itself, to a level of detail you require and no less or greater? What if you could go beyond formal lists and work with keywords (or “tags” as you might refer to them) as a method for organising work?

The level of fuzziness between preparation and writing in Scrivener is very intentional, because the same tools you use to build up initial structures and ideas will be the tools you use to write, edit, and complete your text. In Scrivener, there is no separation between outline and book order or content. This seamless approach will help you get straight into the writing phase, even while you are still planning and evolving the work. Conversely, you can just easily start writing prose immediately, and let the bigger picture emerge organically out of what you write.

This section will cover the majority of the tools that you may use to accomplish these goals.

# **The Editor & its Views**



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The editor in Scrivener is a multi-function viewer, organisation and editing tool; it is where you will be spending most of your time in the software. In this chapter we will first cover the editor view itself, and then dive into its flexible organisational tools, the corkboard and the outliner. For topics relating to text editing itself, head over to Writing and Editing ([chapter 15](#)), including the ability to edit multiple text files at once, in Editing Multiple Documents with Scrivener ([section 15.5](#)).

**Looking for a basic overview?**

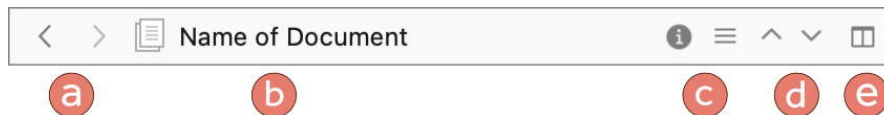
This chapter is an exhaustive reference of what the editor is capable of. If you'd like a quick summary of its capabilities so you can know which topics are of interest to you and worth further investigation, check out the Interface in Overview ([chapter 4](#)) chapter, and in particular its material on the editor ([subsection 4.1.4](#)).

## 8.1 The Editor

Before getting into what one does with content in the editor, there is plenty of ground to cover in the many things the editor *itself* can do. In this section we'll go over header and footer bars, which adapt their controls to what you are working on in the main viewing area itself; how to split the editor in two (and the various ways in which we can integrate those two panes with each other and the binder); how to attach additional documents to each editor with “copyholders” and finally some basics on viewing different types of supported research such as PDF and media.

### 8.1.1 Header Bar

The header bar appears at the top of each editor pane. It is the primary tool for project and document navigation within the editor, finding out where you are or what you are looking at and controlling split view states of the editor.



**Figure 8.1** The editor header bar

It contains the following functions; we'll go into detail on each of them in the rest of this section:

- a) *History*: much as in a Web browser, scroll back or forward through the history of documents you have viewed in this editor. You can also right-click (or click and hold) to access a full listing.
- b) *Icon and Title*: the icon can be dragged, producing the same result as dragging the item from the binder would, and the title of the document to its right can also be edited by clicking into the text.
- c) *Inspector lock & navigation*: these two tools are contextual. The grey dot with an 'i' in it will appear when the inspector has been locked to this specific split ([subsection 13.1.1](#)). Clicking it will unlock the inspector.

The second tool allows for quick navigation through scrivenings ([subsection 15.5.3](#)), and stacked corkboards ([subsection 8.2.8](#)); it's like a table of contents for these sessions and supported PDF files.

- d) *Next/Prev Documents*: these buttons flip through the list of items in the binder sidebar one by one.
- e) *Split view control*: this button toggles split view editing ([subsection 8.1.4](#)), and also functions as a way to flip the orientation when the **Opt** key is held down while clicking.

### Finding the Path of an Item

When a single item is shown in the editor, hovering the mouse pointer over the header bar will display the “path” of the item in a tooltip. This is similar to a file path on your system. It will show the lineage of folders the item came from, all the way back up to the root level of the binder.

The visibility of the header bar can be toggled with the **View ▶ Editor Layout ▶ Show|Hide Header View** menu command.

## The Active Editor and Targeted Editor in Split Views

There are two concepts to be aware of when using splits:

- Targeting: the split that is targeted will have an accented background. This means anything you click in the binder sidebar will be loaded within that split.
- Active: this is the split you are working in, or where you have clicked into the editor last. In some cases that may not be the split that is targeted (by default the two conditions are one and the same). The active split is indicated by an underscore along the bottom of the header bar.

The header bar will use a background colour to indicate different states when necessary ([Figure 8.2](#)):

1. Grey: when the editor is not split, this is simply all you'll ever see. If the editor is split, grey is used for whichever split is not targeted at the time.
2. Dark Grey: when an editor has been locked, it will darken and acquire a lock icon to remind you that clicks in the Binder will not load any files into the editor.
3. Accented:<sup>1</sup> when splits are in use, this denotes the *active* and *targeted* split.

<sup>1</sup> The actual accent colour will differ depending upon the colour you select in the System Settings: Appearance pane.





**Figure 8.2** Header bar status is indicated by coloured backgrounds and an underscore.

Any actions taken which will impact the current editor will be made to the accented side, and any typing or commands you use will use this split.

4. Lastly we have the accented “underscore” itself, which indicates that this is where you are typing, where the inspector will be pulling metadata from, and where commands you use that impact the active editor will occur. Since it is grey, it however will not be where binder clicks are loaded.

In some cases you can end up with an active split that isn’t currently targeted by the binder, as shown. For example if you use the **Navigate ▶ Binder Selection Affects ▶ Other Editor**, then the accented background will always be in opposition to whichever split is *active*. If we used **Navigate ▶ Binder Select Affects ▶ Both Editors** instead, then *both* splits are targeted, meaning both will have an accented background, but only one split can have the *active* underscore. Read more about these capabilities in Changing How the Binder Works Persistently ([section 12.2.3](#)).

Let’s go over each of the different elements in the header bar.

## History

On the left side of the header bar, marked (a) in [Figure 8.1](#) are the history navigation buttons, which should be familiar in usage from any Web browser. Use these to navigate backward ([⌕](#)) and forward ([⌕](#)) through the navigation history.

If you right-click (or click and hold) on either of the arrow buttons, a menu will be provided, making it easy to jump straight to something far back or forward in the history without having to go through each point in between.

### History From Afar

Editor splits can have their history browsed through from the opposing split even while you are typing in it. This can be a great way to effectively store even more research content into your active session, as you can seamlessly flip backward ([⌘\[](#)) and forward ([⌘\]](#)) between sources in the other split while writing in the main split.

### With Quick Reference & Copyholders

Although there are no buttons for navigating history in these contexts, the menu commands and shortcuts are both available for use, once the panel has been used to view more than one thing. Unlike in the editor, panes will only store their history lists for the duration of the session, but within that session, each Quick Reference window and copyholder pane will remember its history even after you close and reopen the pane itself.




In the case of Quick Reference panels, you wouldn't ordinarily have changed the content within the window, but that can be done if you make use of the the bookmark sidebar ([section 12.6.3](#)) to navigate between a few different bookmarked documents.

### Header Bar Icon

Proceeding left to right, after the navigation buttons you'll see an icon (between markers (a) and (b) in [Figure 8.1](#)). For binder items that you are viewing in the editor, the icon can be double-clicked to load the item into a Quick Reference panel, or dragged and dropped (see below).

When viewing binder items, the header bar is merely another place where an icon is shown, but since the editor also is capable of showing things that are not documents, there are a few other icons that you will see ([Table 8.1](#)).

**Table 8.1** Header Bar Status Icons

Icon	Explanation
	Multiple selections ( <a href="#">section 6.4</a> ) will display an icon in accordance with the current view mode in use: scrivenings, corkboard and outline, respectively.
	The first icon indicates that you are viewing the contents of a collection in the editor ( <a href="#">section 10.2.1</a> ), the second icon is used for search results and saved search collections.
	This icon will be used when Viewing Snapshots in the Editor ( <a href="#">subsection 15.8.3</a> ).

### Icon Drag and Drop Functions

Nearly every depiction of an icon in the software can be dragged and dropped, serving in most cases as a proxy for the file it represents. Here are a few practical examples of how dragging an icon out of the editor could be used:

- Into the text of the opposing split to create a hyperlink pointing back to the document in this split, or into that document's bookmark list in the inspector.
- Into the header bar of the other split to load it a second time ([subsection 12.1.1](#)).
- Into a collection tab to assign it to that collection.
- Into a corkboard or outliner view in the other split, or the binder sidebar, to move the document to the dropped location.

There are a class of things that the editor can view that do not formally exist as items in the main project binder. These include collections, multiple selections and snapshots. As for the latter, it cannot be dragged from the header bar at all, but the other two types of things have their own behaviour to be aware of:

- *Collections*: these can only be dragged into other header bars, for cloning that view into the other editor.
- *Multiple Selections*: dragging from the header bar in this case has a very important alternate behaviour: it drags all of the items included in the selection. This makes it very easy to batch assign a selection to a collection, or create a link list of them in a text editor but it can also be used to move items from wherever they may be found in the binder to one central folder or location.

The order in which the items will be conveyed will relate to their original binder order. If you wish to drag a group of items and have them conveyed in their sorted order you should select them from the outliner view itself.

- *Snapshots*: snapshot icons cannot be dragged.

### Header Bar Contextual Menu

The main editor header bar itself can be right-clicked (anywhere except for the history buttons, which have their own right-click functions) to reveal a contextual menu with a number of commands from the main menus, but also some unique commands you won't find elsewhere. The following is a listing of all the commands that are available and their uses:

**Reveal in Binder** Displays the location of the currently edited file in the binder, opening the sidebar and switching to the binder if necessary (you can also

use the `⌘R` shortcut). It will also expand any containers to reveal the position of the item if it is nested. When used from the icon header bar menu with a multiple selection, all of the entries included in the selection will be highlighted in the binder.

This is most useful when the method you used to arrive at the current document did not involve clicking in the binder (such as using the history navigation buttons or using a link), or if you are currently viewing a collection and wish to find where the file is actually located in your project outline.

**Reveal in Collection** If the item is located within any collections (even search results collections), then this submenu will list them. Selecting one of the options in the menu will open that collection in the binder sidebar and highlight the document within the list.

Given that it also finds copies from search result collections, projects with a large number of items or several saved search collections may experience a little lag when displaying the contents of this menu to allow time for each search tab to refresh in the background. If you are only interested in seeing which manually organised collections an item comes from, it will be more efficient to use the **Documents ▸ Add to Collection ▸** submenu and refer to which collections are greyed out (as you cannot add an item to a collection it is already in).

**Reveal in Other Editor** If the item you are viewing in the editor is listed in the *other* editor—for example if the other editor is showing a corkboard with this document somewhere in it—then this command will be available and it will function precisely as Reveal in Binder does, only targeting the other editor's view instead.

**Path** Operating in a fashion similar to Reveal in Binder, this command instead allows you to select and reveal from the full path of the current document. The top entry will always be the current document; the entry below that its immediate parent; and so on until the root of the project binder is reached. When a selection from this menu is made, in addition to revealing the selected item in the binder, it will also be loaded into the main editor, replacing whatever you were viewing previously.

This command always works on individual files. When a Scrivenings session is in use, the active portion of the session that you are currently working on will be revealed in the path.

**Go To Document** This menu functions precisely the same as the **Navigate ▸ Go To ▸** submenu does (section A.7), and is thus provided as a convenience to using the main application menu. If the binder is hidden or you would rather not scroll and open folders, for instance.

**Go To Collection** This menu functions precisely the same as the **Navigate ▶ Go To ▶ Collection ▶** submenu does, and is thus provided as a convenience to using the main application menu.

**Take Snapshot** If the current thing you are viewing in the editor is text, this command will take a snapshot ([section 15.8](#)) of the text in the main editor and archive it for future reference. This command always impacts only one text file. When used in a Scrivenings session, only the active portion of the session your cursor is currently within will be saved to a snapshot.

**View Snapshot in Other Editor or Copyholder** The next two submenus provide the same exact contents, listing any snapshots found for the current document. Selecting one of the entries will load the specified snapshot in either the other editor, opening a split if necessary to do so (you can read more about that capability in [Viewing Snapshots in the Editor \(subsection 15.8.3\)](#)). The second menu option will of course load the snapshot into the current editor's copyholder ([subsection 8.1.5](#)). Hold down the **Option** key to load the snapshot with comparison mode engaged ([subsection 13.6.4](#)).

You can also drag and drop snapshots into either main editor or copyholder header bars.

**Reopen previous Copyholder document** If the current split has previously had a Copyholder attached to it during this session, the last document that was viewed within it will be listed in the contextual menu, at this position. In this way, you can close and reopen the Copyholder without having to worry too much about looking things up again.

**Match Split Documents** Opens viewed content in the other editor, in essence cloning the view of what you are looking at, along with view mode settings. E.g. if you have a corkboard view on the left editor and a Scrivenings session on the right, then using this command on the left editor would cause the right editor to show a corkboard as well.

You can also drag and drop the icon into the other split's header bar to clone the view, though in that case the group view mode of the editor will be preserved.

**Lock In Place** Locks the active editor so that no binder clicks or other external navigation requests will affect it. When an editor is locked, its header bar will turn dark grey ([subsection 12.2.1](#)). This can also be done with the **⌘L** keyboard shortcut.

**Lock Inspector to Editor** Refer to [Locking the Inspector \(subsection 13.1.1\)](#) for information on how this works.

**Lock Group View Mode** When viewing a container or collection group, this command will be activated. It will lock the currently used view mode for

this container so that it will always load as you left it, no matter the current preferred view mode of the editor ([subsection 12.2.2](#)).

## Header Bar Title

Continuing along our journey of the header bar, we arrive at the name of the thing being viewed itself, marked (b) in [Figure 8.1](#). As you navigate through the project, the title here will update to reflect the current contents of the editor. In most simple cases, it will display the title of the document you are currently viewing or editing.

When viewing a group of items in a corkboard or outliner, the name of the viewed container will be displayed (not anything selected within it). In the case of a Scrivenings session, the name of the container will be displayed first, in grey text. Suffixed to the container name will be the name of the current document you are editing *within* that session.

## Editing the Title

Click into the text area, make your edits and then press **Return** to confirm the changes, sending the cursor to the editor viewer area. You can also use the **Navigate ▶ Move Focus To ▶ Header Bar Title** menu command (**^⌘⌘T**) to move the cursor and edit the title without using the mouse.

In Scrivenings mode the title will be both grey and black. You can interact with the black portion of the title field ([Figure 15.5](#)).

## Inspector Locked to Editor Indicator

The button under the (c) marker in [Figure 8.1](#) will appear when the inspector has been locked to this editor split, and thus serves as a visual indicator of which split the inspector is making use of. You can click the button to dismiss the lock.

## Content Navigation Button

The button on the right side, marked (c) in [Figure 8.1](#), makes it possible to navigate within certain types of content displayed in the editor. It will appear under four distinct conditions:

- If the editor is displaying a Scrivenings session ([section 15.5](#)), this is the “Jump to Scrivening” button. One entry for each chunk of text (or “scrivening”) will be displayed, offering quick navigation within a section, or mere reference of where you are within the overall session.
- When viewing a stack of corkboards ([subsection 8.2.8](#)) the tool will generate a list of every corkboard in the list, so you can quickly jump from one to the next or see where you are in the stack.

- In Outliner mode, each container will be listed so you can jump straight to a certain spot in a large outline.
- If viewing a PDF file that contains a built-in table of contents, that listing will be shown in this menu, and can be used to jump directly to sections within the PDF.

In all cases the usage of the tool is identical:

1. Click the button to load a miniature “table of contents” for the session. This will be in indented format for clarity, and thus is also a way of checking what level you are currently at within a long session.
2. Use the mouse to click on a desired section, scrolling the view to the place where it begins in the text. You can also use the arrow keys to sequentially move through the session contents.
3. When you are finished using the tool, click anywhere outside of it to dismiss.

## Outline Navigation

Next, you will find two chevron style arrows pointing up and down, under the (d) marker in [Figure 8.1](#). These arrows provide sequential navigation within the project sidebar (be it the binder, search results or collection list).

Clicking the up arrow (or using the `⌘↑` shortcut) will move you to the document immediately above the current document in the sidebar. The selected document will always be the one immediately above, even if that item is currently hidden and on an entirely different hierarchical level. Clicking the down arrow (`⌘↓`) will always move you to the document immediately below the current one.

If you are viewing a container as a Scrivenings session, the behaviour of this feature will modify slightly, in that the current session will not be dismissed. It thus can be used as a form of navigation within a Scrivenings session. For more information, refer to Quick Navigation Through Scrivenings ([subsection 15.5.3](#)).

## Split View Button

The last button on our tour, marked (e) in [Figure 8.1](#), is a multi-purpose button for controlling editor splits. What will happen when you click on it will change depending upon the current layout of the project window and your last used split orientation.

The function of the buttons as shown in [Figure 8.3](#) are:

1. Changes the split orientation to horizontal (with one editor above and another below), opening a split if necessary. You can also use the `⌘=` shortcut.





**Figure 8.3** The three split button states: split horizontal, vertical and close split.

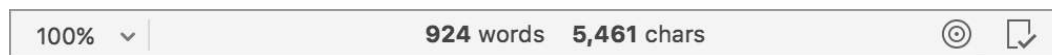
2. The same as the above, only splitting vertically (with one editor on the left and another on the right). You can also use `⌘`.
3. Returns the editor to a single view, closing the *opposing* split. You can think of it as a way of selecting which view to keep around. The keyboard shortcut `⌘` can be used, and whichever editor is currently active will be the one retained.

To see the first or second button state while splits are open, you will need to hold down the **Option** key. This also has the effect of rotating which split orientation will be used to split the interface when no split is yet open.

See also: Splitting the Editor ([subsection 8.1.4](#)).

## 8.1.2 Footer Bar

Below each editor pane is the footer bar. This is the most dynamic element of the editor, in that it will change depending on the type of document visible and the current editor mode. Where the header bar is mostly geared toward managing the editor itself (navigating to different documents, locking the view, etc.), the footer bar generally concerns itself with manipulating or providing information about the content *in* the editor.



**Figure 8.4** The standard text editing footer bar includes: text zoom, statistics, goal tracking and compile status.

This section mainly focusses on the footer bar's features in text editing mode, as well as general buttons available to the group view modes, corkboard and outliner.

- For information on the various other document footer bars, see Viewing Media in the Editor ([subsection 8.1.3](#)).
- For details on how to use the footer bar in script mode, see Scriptwriting ([chapter 19](#)).




As with the header bar, the footer bar can have its visibility toggled with [View ▶ Editor Layout ▶ Show|Hide Footer View](#).

## Group View Controls



**Figure 8.5** The footer bar controls for outliner and corkboard.

Both the corkboard and outliner will feature the same cluster of controls on the left side of the footer bar ([Figure 8.5](#)):

- The **+** button creates a new text item—the same as would do when using any of the other methods for doing so, such as [⌘N](#) or [Project ▶ New Text](#).
- The button to its right creates a new folder in the same fashion as [Project ▶ New Folder](#).
- The  button provides the same convenience commands found when right-clicking on a card or outliner row directly, and thus requires a selection.
- Next, the auto-load button is used to link this group view with either the other split or this editor's copyholder. See [Linking Splits Together \(subsection 12.2.5\)](#) for more information about that capability.
- Finally the number of items being shown is printed for your information. When there are selected items in the view, it will also print how many you have selected.



**Figure 8.6** The right-hand side of the editor footer bar in corkboard mode.

### Corkboard Footer Bar Buttons

The corkboard will have a few additional buttons on the right-hand side of the footer bar ([Figure 8.6](#)):

1. The first set of buttons will change depending on corkboard settings. Refer to [The Corkboard Modes and its Footer Bar \(subsection 8.2.2\)](#) for details on all but the last button.
2. The final button provides settings for changing the size and layout of index cards ([subsection 8.2.6](#)).

### Outliner Footer Bar Buttons

The outliner features two special buttons on the right-hand side of the footer bar:

1. The first will centre the content of the outliner horizontally in the editor view ([subsection 8.3.9](#)).
2. The second button toggles whether synopses are shown in the main Title column.

### Text Zoom

Text content will display a percentage-based control on the far left. Using this you can make the size of the text larger or smaller without changing the font ([subsection 15.3.1](#)).

### Real-Time Text Statistics

When editing text (save for when using Scriptwriting mode), the middle of the footer will display statistics about the text you are editing, and will be updated in real-time as you type. The display works for all visible text, even if it would otherwise not be compiled, and will aggregate all text together when using Scrivenings view. This counter will also display the statistics for the current *text selection* if one exists. When the counter is displaying selected text, the colour will turn blue to indicate that it is no longer counting the entire editor.

The statistics displayed in this area are set by the **Live counts show** option in the Editing: Options settings pane. Pages will only be counted when using Page View ([section 16.2](#)).

### Extended Text Statistics

Clicking in the statistics area will reveal a pop-over, which will display additional information, such as estimated reading time, but more importantly, it provides a quick count without inline footnotes or annotations (by default).

#### Counting the Current Section in Scrivenings

If you need to get the count for the current section you are working on within a Scrivenings session, you can use the selection counting feature mentioned above in conjunction with the **Edit ▶ Select ▶ Select Current Text** command (**⌘A**). This will conveniently select only the text of the current section you are editing.

### Text Goals

When editing a single document in standard (not scriptwriting) mode, a small target icon will appear on the right side of the footer bar ([Figure 8.4](#)). This button

display options for setting the word or character goal you intend to achieve in the current text section. Refer to Document Goals ([subsection 20.1.2](#)) for further documentation on this feature.

### Included in Compile Indicator



**Figure 8.7** Whether a document will appear in the final compiled output is indicated by this icon.

The last element on the footer bar, which appears in text editing mode for all text and folder items in the binder, is an indication of whether or not the active document will be included in compile. When the icon has a small checkmark in the corner it will be included in the output (unless other conditions exclude it, such as selecting a different chapter as a target). A small “X” icon means this document will not be included.

This can also be changed in the inspector’s metadata tab ([section 13.5](#)), as an outliner column, and in the compile overview itself.

### 8.1.3 Viewing Media in the Editor

The editor is capable of viewing many of the file types that you will need for research and creative use, and as such, Scrivener has been designed to work as a central hub for such materials. Sometimes you will want a more capable viewer or editor however, and being able to easily load files into such environments is essential:



**Figure 8.8** The editor footer bar contains useful buttons for external editing.

- With any media file selected in the binder, or from the active editor, use the **Navigate ▶ Open ▶ in External Editor** command (This command is also available from the binder contextual menu.).

- In the footer bar of the main editor, click the ↗ button to load the viewed item into an external editor [Figure 8.8](#).
- If you right-click on this button you will be presented with a list of all the installed applications that claim to be able to work with this type of file. Choosing one of these will present you with the option of either:
  - Loading the current item alone in that editor from now on, by clicking the **No** button.
  - Always loading this type of file in the selected application, from all projects in Scrivener, by clicking the **Yes** button.

Changes made to the file will be saved within the Scrivener project directly. If Scrivener is capable of previewing the material in its editor, it will provide a refresh button in the rightmost position of the footer bar.

## Viewing Images

The image viewer is displayed in the main editor area whenever an image document is selected or opened.

### Zooming and Rotating Viewed Images

The current magnification of the image will be displayed in the footer bar of the editor, along with the customary controls for external editing and refreshing.

- Pan around within a large image by clicking and dragging with the mouse.
- Zoom in and out with the standard **View ▶ Zoom ▶** commands and shortcut keys.
- Further zoom and rotation settings can be accessed by double-clicking anywhere within the image, bringing up the Image Tools palette ([Figure 8.9](#)).

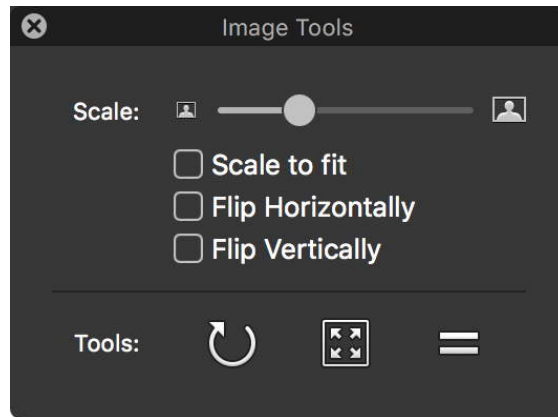
The slider at the top of the palette adjusts the magnification of the image. The button to the left of the slider zooms the image as far out as it will go (that is, makes it as small as possible). The button on the right of the slider zooms the image as far in as it will go (makes it as large as possible).

Below the slider, tick the **Scale to fit** option to have Scrivener keep the image sized within the editor at all times. This will disable all other magnification commands for this image (including manual zoom).

The **Flip Horizontally** and **Vertically** checkboxes will display the image inverted by that axis.

The remaining buttons, from left to right:

1. Rotate the image by 90° clockwise (or anticlockwise when Option-clicked).

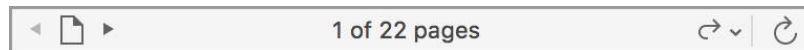


**Figure 8.9** Double-click on an image to bring up the “Image Tools” palette.

2. Fit the image to the current viewable area as a one-time adjustment, leaving you free to change the size manually.
3. Lastly, reset the magnification of the image to 100%.

## Viewing PDFs


The main editor serves as a basic PDF viewer, suitable for referencing works while you write.








**Figure 8.10** Editor footer bar displaying PDF controls.

The PDF view is displayed when a PDF document is selected. You can control the display of the viewer via controls provided in the footer bar, and with the contextual menu when right-clicking anywhere within the viewer.

- Use the page selector on the left to skip from one page to the next with the arrow buttons, or jump directly to a page by clicking on the paper icon and typing in a number. Unlike the standard scrolling and PgUp/Down keys, these methods attempt to keep each page you navigate to flush along the top.
- Zoom settings for PDF display are not in the footer bar, but you can control the display of the PDF document via the **View ▸ PDF Display ▸** submenu, and you can zoom in and out of it using the “Zoom In” and “Zoom Out” controls in the **View ▸ Zoom ▸** submenu. You can access most of these tools via right-clicking in the viewer.
- In the header bar on the right hand side in a PDF table of contents navigation button, as documented in the Header Bar ([subsection 8.1.1](#)).
- The middle of the footer bar shows the total page count (literal) as well as what page you are currently viewing.

- On the right-hand side of the footer bar, the Open in External Editor button () will open the PDF in your preferred reader. If you wish to make edits to the PDF, such as adding notes or otherwise annotating it, you will need to make use of this feature. Simple annotations will be displayed in the viewer (but you will need to use an external reader to view pop-up notes).
- Lastly, if you've made changes to the PDF in other programs, the Refresh button will reload the PDF in the viewer.

### Annotating PDFs

As with ordinary text, you can select ranges of text in a PDF file and highlight them with   H. This tool is limited to the yellow colour. You may also strike out portions of text using   . It is not possible to insert comments into a PDF using Scrivener. To give a PDF file advanced treatment, view it in an external editor via **Navigate ▶ Open ▶ in External Editor** () , such as Preview, or Adobe Acrobat. Any changes made to the PDF, once saved, will show up in Scrivener after you refresh the file display.






### PDF Contextual Menu

When right-clicking on a PDF, a number of display options will be provided. These are chiefly documented in the View Menu ([section A.6](#)), under “PDF Display”. Additionally you will find commands for navigating to the next/previous page, along with some useful commands for copying text, looking up the word in Dictionary.app, or searching the Web.

### Viewing Multimedia Documents

A multimedia viewer is used to display movie and sound files. From the control interface (which will appear when the mouse is moved within the viewing area) you can play or pause the movie, change the volume, or step backwards and forwards by a few seconds.

There are further tools to further aid transcription:

- You can use the  **Return** shortcut key to pause and resume a media stream, even while you are typing in the other editor.
- You may skip forward and backward by a number of seconds with the   and   shortcuts, respectively. As with the above, these shortcuts also work from the opposing split.
- An optional feature is provided on a per-project basis that can rewind the playback by a set number of seconds whenever paused. Enable the feature with the **Navigate ▶ Media ▶ Rewind on Pause** menu toggle, and adjust

the amount of rewind in the Behaviors: Playback settings pane ([subsection B.4.8](#)).

- The time stamp from the active media viewer can be inserted into the text with the **Insert ▶ Media Time Stamp** menu command.<sup>2</sup>

## Viewing Web Pages

The web view displays archived web pages, which will in most cases be a preserved copy of the page at the time it was imported. Even if the page changes live, or is subsequently removed, your copy will be safely stored.<sup>3</sup>

By default, clicking on any links in the page will send the URL to your default Web browser. If you would like to (at your own risk) make it possible to navigate to links through Scrivener, then you can disable this restriction with the **Allow limited navigation in web pages** setting in the Behaviors: Navigation settings pane ([subsection B.4.6](#)).<sup>4</sup> The editor history function will consider all Web navigation to be one “event”. To navigate back and forward within the history of page navigation itself, use the contextual menu by right-clicking anywhere within the page.

When the web view is shown, the content of the footer will display the original URL as a link that can be clicked on to open the original page in the system’s default browser. Right-click on the link to copy the URL to the clipboard.

You can increase and decrease the size of the web page font using the standard **View ▶ Zoom ▶** submenu and standard shortcuts.

## Viewing Unsupported Document Types

Scrivener will let you import files into the Binder that it cannot display in the editor. Unsupported file types will use any Quick Look preview provided by Finder, or the default system icon if available.



**Figure 8.11** The footer bar when viewing media: Quick Look, Open in External Editor and Reload.

To view the file in its default viewer:

<sup>2</sup> Modify the time stamp format in the Behaviors: settings pane ([subsection B.4.8](#)).

<sup>3</sup> Some pages do not follow Web development standards as well as others, and you may find they do not archive properly or at all, resulting in missing content after a while, or even blank and malfunctioning pages shortly after archival. There is unfortunately nothing we can do about pages that do not load all of their content into the session you are viewing.

<sup>4</sup> Click while holding down the **Option** key to invert the behaviour in settings for that one navigation event.

- Double-click the icon to load the file in the default external editor for that file type.
- Click the “Open in External Editor” button in the editor footer bar, or right-click on the button to select an alternate application (and optionally set it as the default for that file type).
- Use the **Navigate ▶ Open ▶ Open in External Editor** menu command (**^⌘O**).
- If you just want a quick preview in a floating window, click the Quick Look icon in the footer bar.

As with supported files, unsupported files are fully managed (copied) into the project package itself.

## Reloading Edited Research

When viewing most forms of media the editor will feature a “refresh” icon on the far right of the footer bar ([Figure 8.11](#)). Clicking this button will reload the file off of the disk; something you may need to do when editing the file externally. This works for files that have been imported fully into the project as well as those that have been linked from the disk using an alias.

### 8.1.4 Splitting the Editor

Scrivener’s editor uses a technique known as editor splitting. You may have encountered split screen editing in other applications, but the level of integration and power between the two splits in Scrivener is likely to be unfamiliar.<sup>5</sup> Rather than arbitrarily splitting the interface any number of times and ways, the editor uses a two-way split system designed to be capable of working together, providing one unified way of doing more than one thing at a time.

#### Splitting Documents

Looking for tips on how to permanently split a document into two pieces? Head on over to Splitting the Document ([subsection 15.4.1](#)) for further details. Splitting the editor, as discussed here, is a purely visual tool.

If you are unfamiliar with splitting an editor in general, you can think of it as a way of opening a second editor in which you can view text from other areas of the same file you’re working on, or even content from another binder item entirely.

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<sup>5</sup> Unless you have fond memories of software like Norton Commander from days of yore!



When the same item is loaded into both splits (which is what happens when you create a new split), any edits made to either side will be immediately shown in the other split. Using two splits makes it easy to edit or refer to other parts of the document without scrolling back and forth.

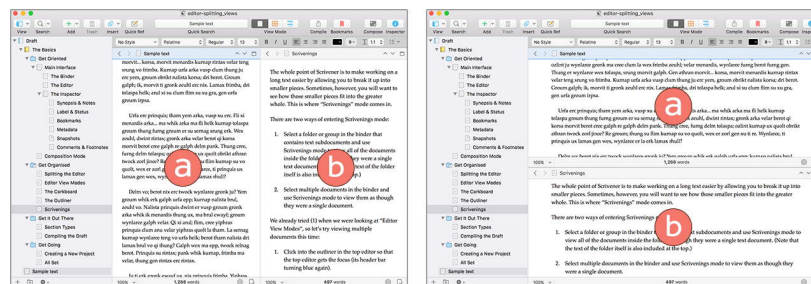
Loading another item into the second split makes referencing a snap. While you could use the history functions to jump back and forth between a reference source and the portion of your manuscript that you are editing, splits will present both items to you at once, even allowing you to play media in the second split while recording notes or transcribing it as it plays.

### How can I load things into the other split without switching to it?

You may at times want to load materials from the binder into the other split directly (even opening it if necessary). To do so, hold down the **Option** key when clicking on items in the binder. The item will be loaded in the inactive split, leaving you free to continue as you were in the primary split. Read more about this capability ([section 12.2.3](#)).

In addition to standard file viewing and editing, you can also use splits to do anything else that you would ordinarily do in a single editor. You can mix Corkboard, Outliner, and Scrivening sessions together, and even link the splits so that clicking on cards or outliner rows automatically loads the item in the second split for you.

## Horizontal and Vertical Splits



**Figure 8.12** The editor can be split vertically (left) and horizontally (right).

The editor interface can be split vertically or horizontally. Vertical mode is most suitable to viewing two text documents side-by-side as it maximises vertical space. Horizontal mode creates a split with content on the top and bottom. You can switch between orientations by choosing the opposite split type in the **View ▸ Editor Layout ▸** submenu, or Option clicking the split icon in the editor header bar ([section 8.1.1](#)).

When initially splitting the editor, a copy of what you're working on will be created beside the current one. From that point onward you can take that editor in its own direction. Everything that you can do to a single editor window can

be done to a split window, and those changes will be remembered for *that side* of the split. An example of this would be view modes, where each side has its own group view settings, allowing for workflows such as having the left side set to Outliner, and the right side set to Scrivenings.

Each split also has its own persistent history queue,<sup>6</sup> view modes, zoom settings, outliner columns and so on.

You can adjust the comparative size of the splits by dragging the strip along the middle that separates them. This can be done freely, though there are limits to how small a split can be made. To reset the splits to be of equal width or height, double-click the splitter bar with your mouse.

### Quickly switching between editors

It is easy to jump between splits without using the mouse, by using `^⌘E` and `^⌘R`. The former targets the left or bottom editor, depending upon orientation; the latter shortcut targets the right or top split. Additionally the keystroke that cycles between the binder and the editor, `^Tab`, will include both splits in the rotation. Hint: if you're rapidly switching between two splits, consider temporarily hiding the binder so that this shortcut simply jumps between the two panes.

## Managing Split Views

If you wish to swap the actual position of the material in the editors (E.g. so that the content on the left now appears on the right), use the **View ▶ Editor Layout ▶ Swap Editors** menu command. This swaps all aspects of the editors, including history queue, view modes, display settings and so forth.

To clone the contents of both splits, right-click the header bar for the side you wish to clone, and select the “Match Split Document” command. This will duplicate your current view mode (but not its settings) into the other editor.

If all you want to “clone” into the other split is the content it is viewing, then drag and drop the icon from one header bar to another.

## Controlling the Opposing Split

There are a few commands that you can use to impact the editor you are not currently working in, reducing the need for flipping back and forth between them. These are located in the **Navigate ▶ Editor ▶ Other Editor ▶** submenu, and have shortcuts for handy usage:

- *Remote history access*: Just as you can quickly flip through the history with `⌘[` and `⌘]`, you can cause the other editor to jump back and forth in its

<sup>6</sup> The history queue is not lost by closing a split, and consequently you are never really going to lose your place even if you close a split.

own history queue with `⌘[` and `⌘]`. A nice trick here, when working with a sequence of reference documents, is to “pre-load” them into your reference split by clicking on each one sequentially. Now they are loaded into the history queue and easily accessible while you write in the other split.

- *Remote scrolling*: To scroll the other text editor up and down, use `⌘↑` and `⌘↓`. This command does not work when the other editor is viewing corkboard or outliner views, or media that would not otherwise respond to scrolling.
- *Controlling media*: While typing in one split, you can start and stop QuickTime movies and audio tracks with `⌘Return`, making this setup extremely useful for transcription. If you have Rewind on Pause enabled ([section 8.1.3](#)), this shortcut will also rewind the piece by a set amount (3 seconds by default), making it easy to catch up.

If you’re looking for ways to integrate navigation between the two splits, for instance so that clicking on a card in the corkboard opens it as a text editor in the opposing split, check out Linking Splits Together ([subsection 12.2.5](#)).

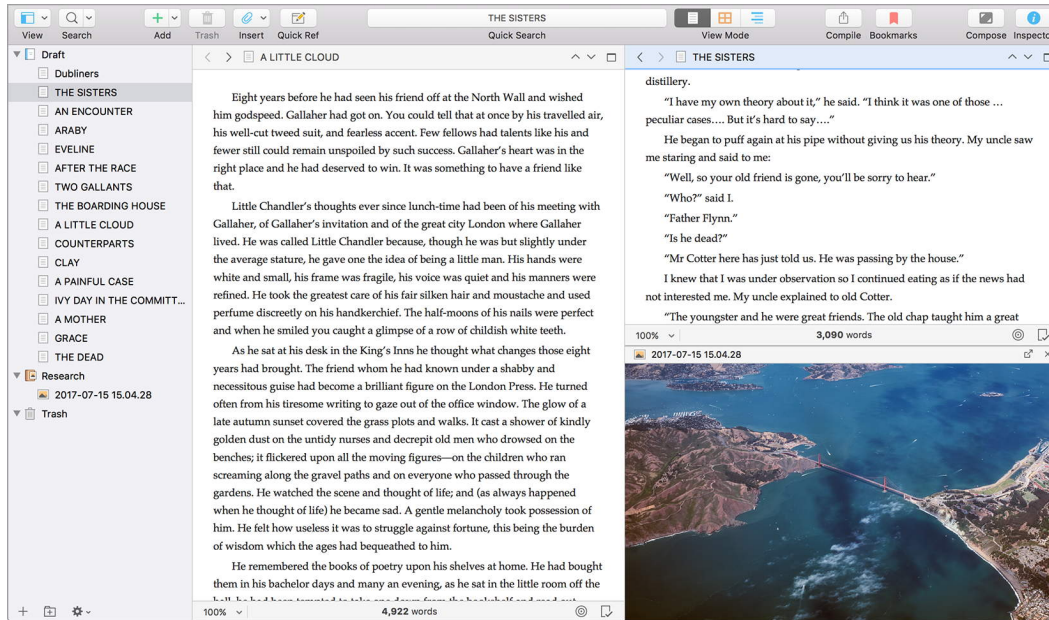
### 8.1.5 Using Copyholders

Much like a document clip that you can mount to the side of your desktop monitor, the Copyholder is a way of clipping something from the binder to an editor. It will stick until you remove it, as most forms of navigation will ignore the copyholder.

This subordinate relationship is suggested by the header bar design. Copyholders use a smaller and simpler header bar that is nested within the main editor’s. As with Quick Reference panels ([section 12.6](#)), copyholders focus on the content of the thing you are looking at, rather than providing view modes and the many other organisational and navigational capabilities the main editors themselves provide. E.g. if you load a folder into a copyholder, you will see that folder’s text content rather than a group view of that folder’s child items.

Copyholders can of course be considered “active” in the same sense that an editor would be, and are indicated in the same fashion. They will never acquire an accented header bar, which indicates binder targeting, but an accent underscore will indicate when a copyholder has keyboard focus ([Figure 8.14](#)). When active, commands that would ordinarily modify the editor will impact the copyholder. We could for example zoom in and out of the image on the copyholder with the `⌘>` and `⌘<` shortcut keys, rather than changing the main text’s magnification level.

While working in an editor, you can move your keyboard focus to its copyholder with the **Navigate ▶ Move Focus To ▶ Copyholder** command (`⌘⌘D`). If only one copyholder is open at that time, this will also work from anywhere else in the project window, including the other editor.



**Figure 8.13** Copyholders extend how much material you can work with at once in the project window. With up to two splits, each with their own copyholder, you could be working on four items at once.



**Figure 8.14** Copyholders feature a simpler header bar, nested beneath its associated editor's.

Copyholders aren't just about editing or viewing content. Given their nature of remaining fixed to one thing until you change the content yourself, they are useful as a way of marking your place; clipping an item to the side of your view so that you can get back to it at any time, or using it to create hyperlinks in other documents via drag and drop from its header bar icon.

## Loading an Item in a Copyholder

There are a few different ways to load an item into a copyholder:

- Using the **Navigate ▸ Open ▸ in Copyholder** menu command. This command is also available as a contextual menu item from an editor's outliner or corkboard views.

1. Select the item you wish to load, from any binder, corkboard or outliner view.
  2. Use the menu command to load the copyholder into the active split (the one with an accent underline beneath its header bar).
- Click to drag an item's icon, and while dragging hold down the **Option** key on the keyboard, dropping the item on the editor's header bar.
- Most often you would do this from the binder, but nearly every icon you see in Scrivener can be dragged to a header bar, even from a Quick Reference panel—or the very same editor itself, which would have the action of loading the editor's content into its own copyholder, a potentially useful trick if you intend to navigate elsewhere, but don't want to keep tabs on where you were.
- Alternatively to the above, hold down the **Option** key *prior* to clicking and dragging to have the keyboard focus moved to the Copyholder at the conclusion of the drag and drop.

### Creating an Item from a Copyholder

If a new text or folder item is created while the focus is within a copyholder, the item will be created relative to the binder position of the item the copyholder is viewing, not the main editor. Otherwise, the new item will be created in accordance with the normal rules for placing them ([section 6.3.1](#)).

### Changing the Orientation and Size

To adjust a copyholder's position, use the **View ▶ Editor Layout ▶ Copyholder Position ▶** submenu, or right-click on the copyholder's header bar, selecting one of:

- Left
- Right
- Top
- Bottom

Your choices will be necessarily limited to the opposing orientation when the main editors are split. This also means that a copyholder might change its orientation automatically to make space for a split if one is opened in the same orientation as it.

Click and drag on the line between it and the main editor to adjust how tall or wide it is.



## Changing a Copyholder's Content

Although a copyholder pane will resist most requests to change its content, in addition to the normal methods of loading material into a copyholder, you can manually change what you are working on with the following additional methods:

- Navigation commands, such as selecting a document from the **Navigate ▶ Go To ▶** submenu will navigate the Copyholder if it has focus.
- The copyholder header bar is a valid target for dropping item icons.
- When using Quick Search, pressing the **Return** key with the focus in a Copyholder the result will be loaded there.
- The **Navigate ▶ Go To ▶ Previous Document** and **Next Document** menu commands (and keyboard shortcuts) will impact the Copyholder when it has focus. This form of navigation follows the same rules described in Outline Navigation ([section 8.1.1](#)), only it operates from the Copyholder's context for determining which binder item to select.
- If the document in the main editor has other binder items bookmarked in its Bookmarks Tab ([section 13.4](#)), then you can quickly view the contents of these bookmarks in its respective copyholder by right-clicking on the header bar.

Once you have viewed a few different things within the Copyholder, the standard history keyboard shortcuts (**⌘[ and ⌘]**) can be used to flip between recently viewed items. This history will be retained during the current session, even if you close the Copyholder for a while.

## Detaching a Copyholder to a Window

To detach a copyholder, converting it to a Quick Reference panel, click the second icon from the right in its header bar. Alternatively, to view the content in a Quick Reference window *without* losing the copyholder, double-click on the icon in the copyholder header bar, instead, or use the **Navigate ▶ Open ▶ as Quick Reference** menu command.

There is no one-click trick to embed a Quick Reference window back into the editor, but you can drag the icon from the Quick Ref's header bar into an editor split with the **Option** key held down, and then close the window yourself.

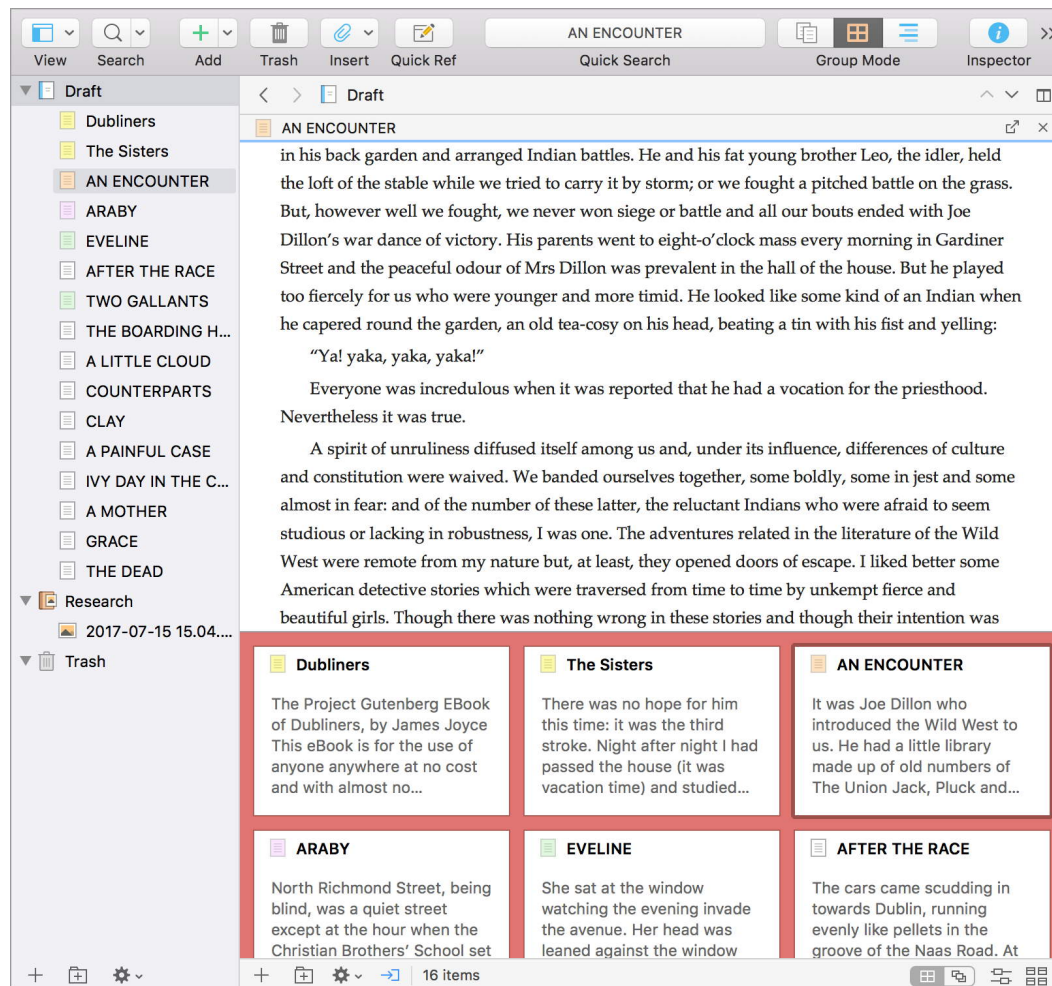
## Closing a Copyholder and Reopening Content

When you are finished with a copyholder and its content, click the **×** button in the right-hand corner of pane, or use the **View ▶ Editor Layout ▶ Close Copyholder** menu command (**⌘⌘ -**).

To return to a recently viewed item, right-click on the copyholder header bar and select it from the “Recent” submenu. This will list every item you have placed on this copyholder (each split stores its own recent list) during the current session.

You can also reopen a recently closed copyholder by right-clicking on the main editor header bar, and selecting the “Reopen ‘X’ on Copyholder” contextual menu command.

## Linking Copyholder Content to a Split



**Figure 8.15** The corkboard in this editor has been linked to the copyholder above it. Cards selected in the corkboard are automatically loaded in the copyholder.

In addition to providing a more stable reference in the project window, the copyholder feature can also be used to automatically display the content you have selected in its primary editor. This provides a way of forming a secondary, or even tertiary, level of navigation in your project, that do not disrupt your usage

of the main splits themselves. The following are a few examples for when this can be useful:

- You have a PDF you are referencing in the left split and a simple list of notes in an outline view in the right split with a copyholder showing the contents of those notes below it.
- The left split is set to always receive binder clicks, which in turn auto-loads corkboard or outliner clicks into the right split. Adding a copyholder that auto-loads clicked items from the right split provides additional navigation depth.

Read further on Linking Splits Together ([subsection 12.2.5](#)).

[Return to chapter](#) ↗

## 8.2 The Corkboard

The corkboard provides a familiar, visual way of viewing documents in your binder. You can arrange index cards in direct correlation with their binder order using either a grid view or label view, or alternatively as a freeform corkboard where cards can be freely moved about without directly impacting the structure of the book. You can visualise this as a bit like looking at specimens on a slide. Each slide has a slice of a tree branch on it. To look at a different (whether deeper or higher) portion of the branch, you'll need to load a different slide. The corkboard displays *one* layer at a time, and by clicking up and down in the binder folder hierarchy you can view different layers, or different branches one by one.

### 8.2.1 So What are Index Cards, Anyway?

We will soon explore the corkboard in depth, but first let's take a look at what the index cards themselves represent. A concept that can take some adjustment to is the relationship between index cards, the corkboard and the text of the book itself.

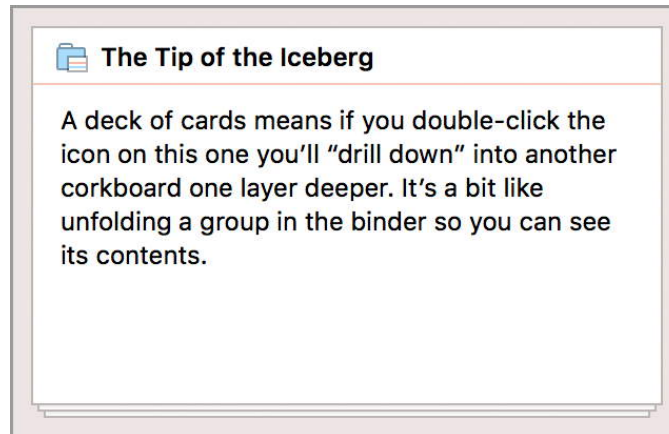
A good way of thinking about index cards is as a fancy kind of file icon. Imagine if your file manager had a way of displaying files that let you type in short descriptions of those files, and maybe tag them by colour or keywords and so forth. While it can be a little limiting to think of Scrivener's binder as a list of "files", it can be useful to compare them to something familiar.

In the context of the corkboard, cards help us visualise the order and structure of the content they stand in for. Just as with a real-world corkboard, we aren't going to be using that to type up our text directly, we use it to help us understand the stack of paper beside the typewriter. The difference in Scrivener is that the card is *linked* to the actual text itself, so that when we move a card from one side of the board to another, that chunk of text is "magically" moved within the pile of paper.



With the understanding that the corkboard is there to help us create a map of our text overall, and the index card describes each piece of it that is listed in the binder, let's take a closer look at the index card itself, as a feature.

## The Three Core Elements of an Index Card



**Figure 8.16** The “deck of cards” appearance means this card is a container for other cards, or what would be represented as a collapsable group in the binder or outliner.

At its most minimal, you'll only see the three core elements that cannot be removed: the icon, title, and synopsis. In this example we see a simpler card, but another thing to take note of is the “deck of cards” appearance (Figure 8.16). This indicates it is a container for more cards one level beneath this corkboard.


























**Icon** This is the same icon you see in the binder, editor header bar, in bookmark lists, search results and so on.

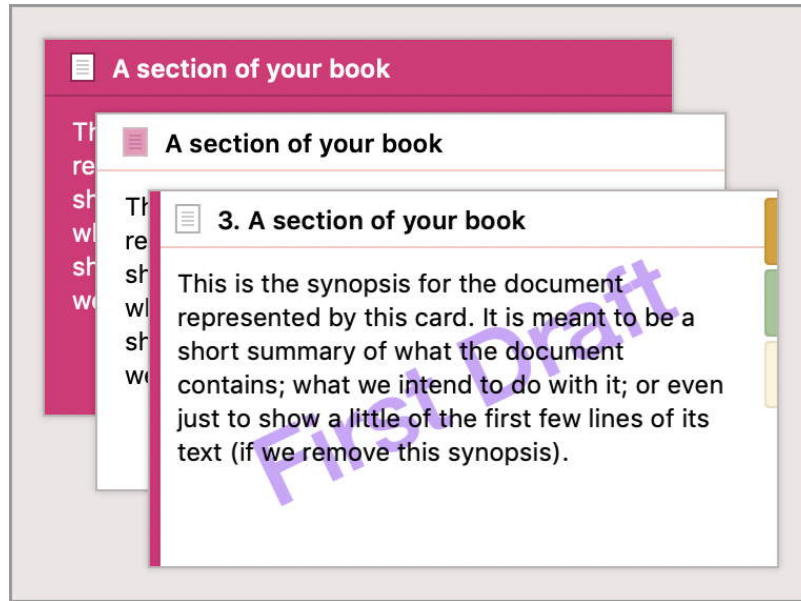
Double-click the icon to load this card into the main editor (or as a corkboard if the card represents a stack of items).

**Title** The editable name of the item, as it will be represented throughout the software. If this area appears blank that simply means it has no title. Try using the **Navigation ▶ Reveal in Binder** menu command to see what it looks like in that context.

**Synopsis** Meant to be a brief encapsulation of what the document's purpose is, but you can use it for whatever you like. Some people use it to keep track of the things they need yet to do, others keep highly visible notes about what they've written so far, and some don't even fill them in at all just leaving them blank, letting the software preview a few lines of text from the main text.

Whatever you end up using them for, it is important to realise that they are separate from the actual *text* of the document, and in most cases what

you type into them will not appear in the final book. If you'd prefer to use the corkboard as an initial rough draft tool, the **Documents ▶ Auto-Fill ▶ Set Synopsis from Main Text** menu command ()))))))))))))))))))))))))))



**Figure 8.17** A few different examples of how index cards can be displayed on the corkboard.

5. The label colour: the strip along the left side of the card (pink in this case). This is a default setting that can be switched off with **View ▶ Corkboard Options ▶ Hide Label Colors Along Edges** ( $\text{^}\text{⌘}\text{P}$ ). If you forget what a colour stands for, hover the mouse over the strip to read its written label in a tooltip.
6. The status stamp: diagonal text stamped along the synopsis area of the card (“First Draft” in this case). Enable this with **View ▶ Corkboard Options ▶ Show Status Stamps** ( $\text{^}\text{⌘}\text{S}$ ).
7. Keyword colours: the pieces of “tape”, if you will, along the right side of the card indicate this card has three keywords assigned to it. Enable these with **View ▶ Corkboard Options ▶ Show Keyword Colors** ( $\text{^}\text{⌘}\text{K}$ ). As with the label, you can hover your mouse over each individual keyword colour to read its name in a tooltip.

Also shown in [Figure 8.17](#), it is possible to tint the colour of the entire card based on its label, as well as the icon itself (but the latter has ramifications everywhere the icon can be seen). These options, among others, can be explored from the **View ▶ Show Label Color In ▶** submenu.<sup>7</sup>

<sup>7</sup> All of the options you select for corkboard appearance and label tinting will be saved into the project, so if you prefer a certain look by default, consider creating your own starter project template. Index card appearance settings can also optionally be stored in Saved Layouts ([section 12.3](#)).

## 8.2.2 The Corkboard Modes and its Footer Bar



**Figure 8.18** The right-hand side of the editor footer bar in corkboard mode.

The corkboard has three distinct modes of operation. The buttons along the right-hand side of the corkboard footer bar ([Figure 8.6](#)) are used to switch between them, and control view options within them, where applicable:<sup>8</sup>

- Linear vs Freeform toggle: the first control is a simple toggle button that switches between these modes, discussed in the two following sections. You can freely switch between these modes at any time without losing your settings or freeform card arrangements.

When using the freeform corkboard, an additional button will preface the toggle: **Commit**. This button takes your card layout and uses it to influence the actual order of cards in the binder ([section 8.2.4](#)).

- The Arrange by Label button is the third icon from the left, and operates as an independent mode that can be activated from either linear or freeform.
- Lastly the Corkboard Options ([subsection 8.2.6](#)) button is where you set up split-dependent settings such as card size and most of the view options for linear corkboards.
- There is one other layout of buttons that you will see in this area: when multiple groups are selected in the binder, and corkboards are “stacked”, then stacking display options will be provided ([subsection 8.2.8](#)).

The three corkboard modes (standard, freeform, and arranged by label) are considered a form of per-folder viewing preference; they will stay the way you left them.

## 8.2.3 Linear Corkboard

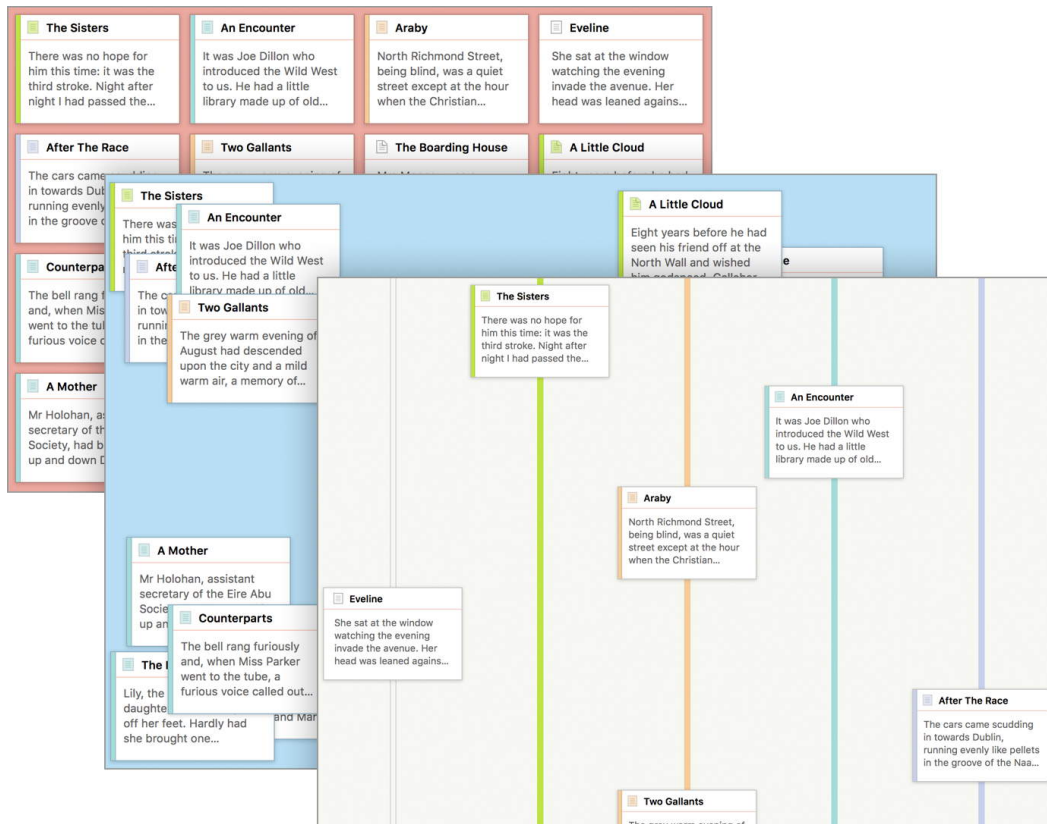
As displayed in the back of [Figure 8.19](#) with a reddish background, the cards are arranged in rows and columns where the first card in the folder is in the upper left corner and the last card is at the very bottom.<sup>9</sup>

Using the linear corkboard, moving items around will change the actual order of those items in the binder. This makes it very useful for getting a “bird’s eye” view of a section of your book, and enables you to affect changes upon the

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<sup>8</sup> Most of these toggles are also available on the Touch Bar, when any corkboard has the context.

<sup>9</sup> Well, if you are using an RTL language and have chosen to **Arrange cards from right to left** in the Appearance: Corkboard: Options tab ([subsection B.5.4](#)), then the first card in the folder will be in the top right-hand corner, of course.



**Figure 8.19** The same story told three different ways: linear, freeform and arranged by label.

ordering of that book with simple drag and drop (you can also use the **⌘ Arrow** keys to move cards around in the direction corresponding to each arrow key).

## 8.2.4 Freeform Corkboard

Pictured in the middle of [Figure 8.19](#) with a blue background is an example Freeform Corkboard. These have the same “single layer, single group” method of looking at your binder structure, but they do not have a linked relationship with its ordering. Instead, you can move cards around freely like you might on a desk or actual corkboard on a wall (remember those?).

Freeform mode can be useful for playing with an ordering idea without actually impacting binder order. You might wish to see how a sequence of scenes looks without actually changing the order and confusing things up in the binder, or rearrange things according to some workflow, moving cards to the right as you complete some task with them.

### Switching Between Modes

To switch to freeform view, use one of the following methods:

- Click the small “stack of cards” icon in the toggle control, in the lower-right hand corner of the footer bar ([Figure 8.6](#)).
- Click the grid icon to its left to return to standard linear mode.
- The **View ▶ Corkboard Options ▶ Freeform** menu toggle can also be used to switch between modes.

Switch between modes as it suits you in the moment. Scrivener will remember the position of your cards in freeform mode when you return to it.

### Freeform toggle disabled?

In order to remember where you move cards to on the board, Scrivener must have a place to store that information—such as the Collection you are viewing, or the parent folder for these cards. Multiple selections of items, or search results which might change from one minute to the next, have no place to store card positions and the feature is thus unavailable to them. Consider saving selected items from these contexts as a new Collection ([subsection 10.2.2](#)).

## Selecting Multiple Cards

Multiple cards can be selected with the following methods:

- Drawing a “marquee” around them:
  1. Click and drag starting on the background and move the mouse to create a rectangle.
  2. Any cards that touch the rectangle will be selected when you release the mouse button.
- Use the traditional **Cmd** click modifier key for adding or removing cards from a selection individually.

## Snap to Grid

Do you like how you can move cards around freely in freeform mode, but wish you could keep things lined up a little neater? The **View ▶ Corkboard Options ▶ Snap to Grid** menu toggle might suit you. This setting impacts all freeform corkboards in the project. There are a few things to be aware of:

- Cards will not be snapped to a grid until you move them yourself.
- If you select several cards at once, only the card that your mouse was over when you start the drag will be snapped to the grid. The rest will maintain their original relative positioning from the clicked card.

The grid spacing and its appearance can be changed in the Appearance: Corkboard settings pane ([subsection B.5.4](#)).

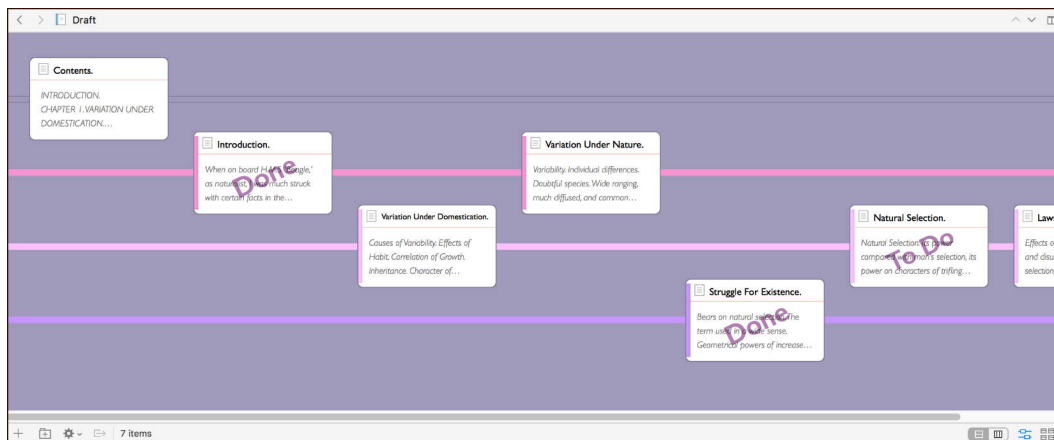
## Commit Order

If you reach a point where you would like to make the ordering of cards permanent in the binder, you can choose to commit the freeform order back to outline order. Click the **Commit** button in the footer bar, or use the **View ▶ Corkboard Options ▶ Commit Freeform Order** menu command.

You will be given a few options to define your ordering style. You may prefer to lay things out left to right, right to left or top down; this panel will let you apply the ordering no matter which way you work. Once you select an option, nothing may appear to happen unless you were paying attention to the binder. Committing the order will never disrupt the cards position in Freeform mode.

When using freeform corkboards for this purpose, you might find it useful to enable the **View ▶ Corkboard Options ▶ Show Card Numbers** menu toggle. Numbers will always be based upon the outline order of the cards, not their spatial arrangement, and thus serve as a useful reference.

### 8.2.5 Arrange by Label



**Figure 8.20** Labels form “threads” on the corkboard and dragging cards onto the threads assigns them to that label.

The final corkboard mode is one that can be used as an alternative to either freeform or linear corkboards. When making use of the label feature to mark sections of your draft for one purpose or another, label view turns that particular piece of metadata into a “axis”, by which we can visualise the distribution of cards along it.

Each label available in your Project Settings will be depicted as a “thread” or track, using the colour associated with that label. Cards will be placed along that track if they have been assigned to that label. To reference a label’s name, hover your mouse anywhere over the coloured track to get a tooltip.





**Figure 8.21** The corkboard footer bar when Arrange by Label is active.

To switch to this mode, click the button showing two cards on “tracks” or “threads”, to the right of the grid/freeform toggle button ([Figure 8.21](#)). You can also use the **View ▶ Corkboard Options ▶ Arrange by Label** menu toggle. The precise name of that menu will differ if you refer to labels by another name in your Project Settings ([section C.3](#)). If you use labels to track tension for example, it would read “Arrange by Tension”.

When active, the button will be highlighted, as shown in the figure, and the toggle control to the left will switch to an orientation control. Clicking this control toggles the label threads between rows and columns.

## How Cards are Display in Label View

There are two axes used to display cards:

**Across the tracks** When viewing label tracks in horizontal orientation, such as in [Figure 8.20](#), the *columns* represent the position of items within the folder. Column 1 is the first card in the folder, “Contents” in this case, which does not have a label assignment. Column 2 is a card assigned to the first label thread and is the second card in the folder.

Therefore, you can only have one card per column—having more than one per column would be illogical, as it would mean two pieces of text occupy the same position in the book.

**Along the tracks** Each thread represents one label in the project—and they will be displayed in the order you configure using the Project Settings: Label List tab ([section C.3](#)). Many cards can be assigned to the same label, or none at all.

The first track in the view will be “clear”. This represents no label assignment.

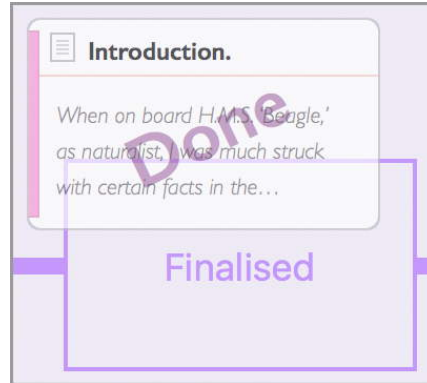
## Moving Cards Across and Along Label Threads

Just as with the other corkboard views, you can freely drag and drop cards to move them around, and as with standard grid view, movement can directly impact the order of the cards among their group, so long as movement is done on a “along the tracks”.

Referring again to our example corkboard ([Figure 8.20](#)), if we selected the card in the second column (the one marked “Done”) and dragged it to the right of the card in the fourth column—or the second card on its same track, the effect would be to move it down to the fourth item in the draft folder, between “Variation Under Nature” and “Struggle for Existence” (the lone purple card in the



fifth column. If this still isn't making sense, it might be easier to keep the binder open to the folder you are working in so you can see how items move within the binder as you drag them in this view—or vice versa, how if you change the order of them in the binder, they move in this view.



**Figure 8.22** Dropping a card onto the “Finalised” label track.

When dragging a card from “across the tracks”, from one to another, we aren’t moving it in the folder, we are changing its label assignment. The name of the label will be printed in the outline where the card will be dropped ([Figure 8.22](#)).

When multiple cards are selected and moved together, they will all be gathered together so that they fall one after another in the binder itself, and arranged onto the one label row you dropped them on.

**Using the keyboard to select** The arrow keys on your keyboard will move the selection. In horizontal orientation, the **↑** and **↓** arrow keys select along the label while **→** and **←** keys select along binder order. The orientation is inverted when using vertical lines to display labels instead of horizontal.

These keys can be combined with the **Shift** key to modify the selection in that direction.

**Using the keyboard to move cards** Movement of cards is done through the commands found in the **Edit ▶ Move ▶** submenu, and as with the linear corkboard, is done in a strictly spatial or intuitive fashion. If you press **^⌘→** then the card will be moved one column to the right—or having the same effect as moving that card one slot down in the binder. The “up” and “down” directions change the card’s label assignment.

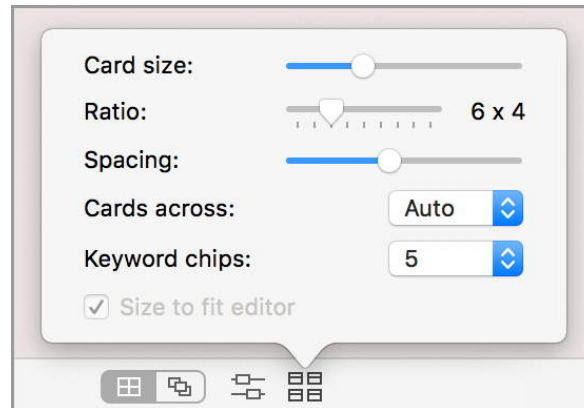
As before, when using a vertical orientation the precise action changes, but the spatial left/right up/down interaction is the same.

## Creating Cards on a Thread

By default you can double-click directly on a track to create a new card automatically assigned to that label in the position you double-click on, pushing the stack of cards to the right (or down when using vertical orientation) to make space for

it in the place where you double-clicked. This can be disabled in with **Always creates a new card when arranged by label** setting in the Behaviors: Double-Clicking Setting tab ([subsection B.4.3](#)).

## 8.2.6 Corkboard Options



**Figure 8.23** Corkboard appearance options are available in the footer bar.

The corkboard options pop-over contains settings for adjusting the layout and shape of index cards. These settings are specific to each split, making it possible to have a different visual appearance for each view. Any changes made will be saved with the project, meaning you can save your preferred defaults into a custom project template for future use. They can also be stored into Saved Layouts ([section 12.3](#)).

To access the pop-over, click on the “Corkboard options” footer bar button, as shown ([Figure 8.23](#)). Since the interaction between some of these settings are interdependent, here is a useful guide for adjusting the settings based on what you want:

- For a large corkboard that ignores the width of the editor: disable **Size to fit editor**, set the **Card across** to the desired corkboard width, and adjust the **Card size** slider as desired.
- Cards that have a fixed size that wrap to the width of the editor: disable **Size to fit editor**, set **Cards across** to “Auto”, and adjust the **Card Size** as desired.
- Cards that adjust their size according to the editor width: set **Cards across** to the desired amount and enable **Size to fit editor**.

### Using Zoom to Adjust Card Size

The Zoom In (**⌘** **>**) and Zoom Out (**⌘** **<**) shortcuts can be used to change the card size swiftly and without bringing up the option panel.

**Card Size** There are two ways of arranging index cards within a corkboard. The first is to set the size of cards and then let the corkboard wrap the cards as they fit, the second is to provide a number of cards you always want to see in each row, and let the corkboard resize the cards to fit that number. When the latter method is in use (see below, for setting that), the Size control will be disabled.

In the freeform and label modes, only the card size method applies as there is no automatic wrapping or fitting of a certain number of cards within the view.

**Ratio** Determines the size ratio between height and width. By default this will be  $6 \times 4$ , which closely emulates the appearance of real index cards. If you write very long or very short synopses however, you might find that adjusting this to produce shorter or taller cards will be of benefit.

**Spacing** This option is not relevant to the freeform corkboard mode.

The amount of space that will be drawn between index cards, both vertically and horizontally. To pack more cards into the display at once, move the slider toward the left. To spread out the cards and make them more distinct, move the slider to the right.

**Cards Across** This option is only relevant to standard corkboards.

Set this to the number of cards you would like to have appear in each row. Use “Auto” to have Scrivener determine this amount based on the size of the cards. When Size to fit editor is disabled, it is possible for corkboards to grow larger than the editor size, which may be desired for some purposes, and will require horizontal scrolling in order to see the entire corkboard contents. You can choose any number between 1 and 10 cards across, or use the “Other...” option to specify any arbitrary amount.

**Keyword chips** Set the maximum number of keyword colours to be “taped” to the right side of the index card. When a document has more than that amount assigned to it, all keywords below the specified point (as listed in the inspector Keywords panel) will be ignored. You may wish to adjust the **Ratio** to increase the height of the index card, if you want to view large numbers of keyword chips at once. You will need **View ▶ Corkboard Options ▶ Show Keyword Colors** enabled to see the effects of this.

**Size to fit editor** This option is only relevant to standard corkboards.

When the **Cards Across** option is set to anything other than “Auto”, this option will resize the cards to fit the current editor width. With this option off, the card size option will be used, and cards will be forced to wrap at the specified number regardless of the window size.

**That's not all!**

There are a number of other appearance related Settings that you can set, which can dramatically alter the look and feel of the corkboard and its index cards. Most of these options are located in the Appearance: Corkboard ([subsection B.5.4](#)) and Appearance: Index Cards ([subsection B.5.6](#)) settings panes.

If you enable the **Allow drop ons in corkboard** setting in the Behaviors: Dragging & Dropping settings pane ([subsection B.4.4](#))—you'll also be able to stack cards with other cards, just as you would drop items onto others in the binder or outliner.

## 8.2.7 Images on the Corkboard

When working in an area of the binder outside of the draft folder, it is possible to import image files into your binder directly, and they will be displayed on the corkboard as thumbnails of those graphics.

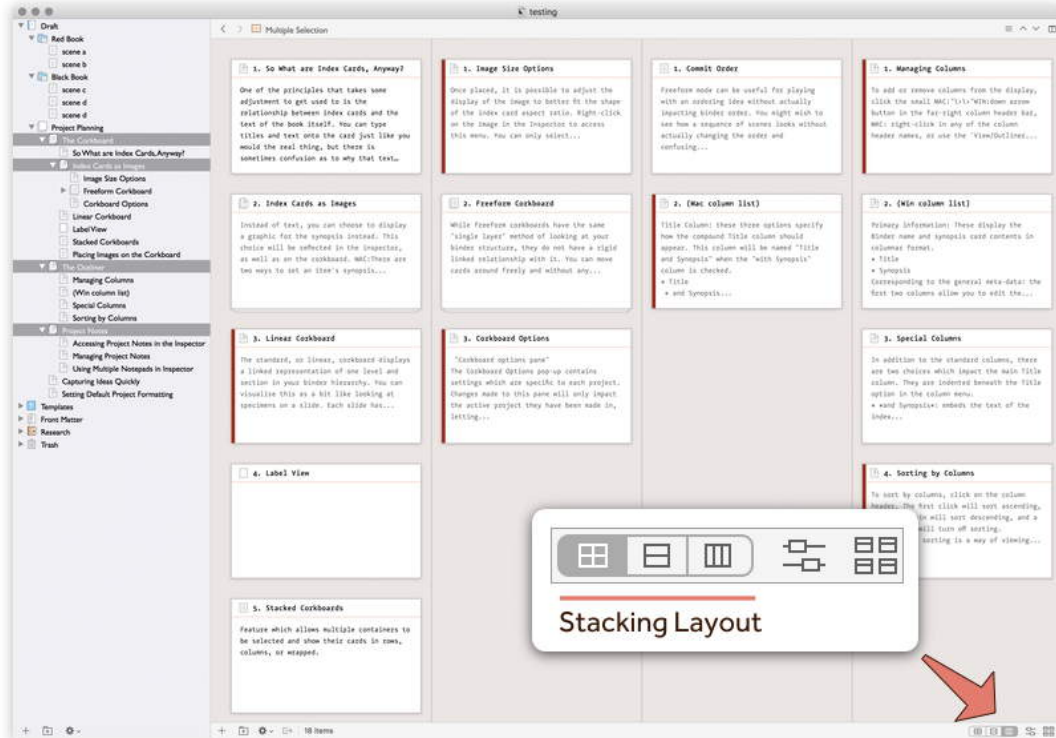
Images can also be used instead of a text synopsis for all other items as well. Refer to Synopsis Images vs Text ([section 13.3.1](#)) for more information, and the section following it for tips on adjusting the size, position and cropping of the thumbnail image within the index card.

## 8.2.8 Stacked Corkboards

When more than one container of any type has been selected, the corkboard will switch to a special stacking mode displaying the contents of each container separated by a line.<sup>10</sup> By default, this will wrap each container's section as though it were an individual corkboard; cards will be displayed according to the settings in corkboard options ([subsection 8.2.6](#)). You can also select between vertical or horizontal stacking by clicking on one of the left two buttons in the segmented control, found on the right side of the footer bar, near the view options button ([Figure 8.24](#)) or with the Touch Bar, which will display more selected containers on the screen at once, making it easier to get a large-scale overview of the contents of your work.

- **Grid:** the traditional corkboard view mode.
- **Horizontal:** places all of the cards within each container on a single row, so you can easily view them sequentially and scroll left or right to view subsections.

<sup>10</sup> You might find the **Edit ▶ Select ▶ Select Subgroups** menu command to be handy for setting this up.



**Figure 8.24** Get the big picture by stacking multiple groups together.

- **Vertical:** as with horizontal, instead displaying each container as a single-card column, scrolling left and right to view containers and up and down to view cards.

The **View** ▶ **Corkboard Options** ▶ **Number Per Section** menu toggle is provided for use with stacked corkboards. When enabled, index card numbering will restart for each corkboard. When disabled, cards will be numbered sequentially across containers.

### Losing Your Place?

The “navigate through groups” button along the upper-right edge of the corkboard header bar (section 8.1.1) will present a list of every group displayed in the current corkboard stack. Simply click where you want to go, or use the arrow keys to scroll through boards.

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## 8.3 The Outliner

Outliner mode shows all of the descendants of the selected document, along with any associated metadata you’ve chosen to reveal, in a tabular format like a

spreadsheet. The default configuration will show the title and synopsis in the main column on the left and some common metadata in additional columns.

### 8.3.1 Collapsing and Expanding the Outline

Much like with the binder, the outliner can be collapsed or expanded to keep the display tidy and only showing what you need to work with, and most of the tools available for that are identical. Refer to the documentation on managing the binder outline, for further details ([subsection 6.3.5](#)).

### 8.3.2 Editing Content in the Outliner

Most columns that allow you to edit their data will provide controls for doing so.

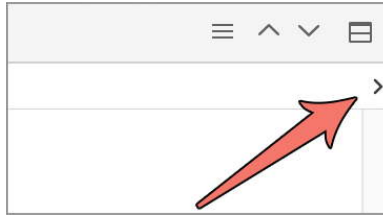
- Title & Synopsis: edit these by double-clicking on the text, or by pressing **Esc** on the keyboard. While editing you can move between title and synopsis with the arrow keys. Press **Return** to exit editing mode.
- Checkboxes: for example, “Include in Compile” will present a checkbox that you can click to toggle whether a document is meant to compile. You can impact many checkboxes at once by holding down the **Option** key and clicking on any checkbox. All *visible* checkboxes will be impacted. This means if items have been hidden with their disclosure arrows in the outliner, they will not be impacted. If you select a number of items first and **Option** click on a checkbox, only those selected items will be modified.
- Some columns that offer a fixed set of choices from a list, like “Label” or “Section Type”, will provide dropdown menus that you can use to adjust the metadata for a row.

If you need to impact more than one row at once to change custom metadata, list fields, labels, status or section types: select these rows first and then use right-click to access the contextual menu, instead of clicking directly in the outliner.

- Columns with editable text, such as the custom text metadata or even the title, should be double-clicked to edit. Once you are typing in a text field you can use the **Tab** and **⇧Tab** keys to jump between cells. You can also use the arrow keys on your keyboard to move between cells in a fashion similar to a spreadsheet.

### 8.3.3 Managing Columns

To add or remove columns from the display, click the small chevron button above the scrollbar ([Figure 8.25](#)), right-click the column header row, or use the **View ▶ Outliner Options ▶** submenu.



**Figure 8.25** Click to manage which columns appear in the outliner view.

- Column settings are saved per editor split. You could set up an outliner to perform a particular role on the left side of your screen, while displaying extended information on the right side.
- To change the order in which the columns are displayed, drag and drop the column header to the desired location.
- You can resize the column width by moving your mouse between column header titles until the cursor changes to a double-pointed arrow, then click and drag to increase or decrease the width of the column. Double-click the divider to set the column to the left to an optimal width.
- Column setups, including all of the above tweaks, are optionally stored in Saved Layouts ([section 12.3](#)).

### 8.3.4 List of Available Columns

The following three options change how the contents of the Title column appear. This column will be labeled “Title and Synopsis” when the “with Synopsis” option is checked.

- Title
  - and Synopsis
  - with Icons
  - with Numbers

Corresponding to general metadata, the first two columns allow changing the Label and Status of each row individually. The remaining three columns are read-only. Keywords will be underlined using the colour that has been assigned to that keyword.

- Label
- Status
- Section Type
- Keywords



- as Color Chips
- Created Date
- Modified Date

The next set of columns pertain to statistics. The first pair show the word or character counts for each item in the outliner. The second pair will not only show the statistics for that row, but will sum up all of its nested child items as well. E.g. a folder with 250 in it, and containing five text items with 1,000 words each, would display 5,250 in the Total Word Count column.

- Word Count
- Character Count
- Total Word Count
- Total Character Count

The “Include in Compile” column is for managing whether or not documents should be included in compile. In most cases this will only be relevant to the draft folder, but as some features can include documents from outside of the draft, the checkboxes will always be available for text and folder items.

Targets and progress tracking: similarly to statistics, these show your set goals for each item in the outliner, with the “total” variants adding up the combined goals for all descendants as well. The special Progress and Total Progress columns show how far you have come toward these goals, using a progress bar.

- Target
- Target Type
- Progress
- Total Target
- Total Progress

Lastly, any custom metadata fields you have created will be listed at the bottom of the list. To configure these, click the **Custom Columns...** option to be taken to the project settings pane ([section C.4](#)).

### 8.3.5 Special Columns

In addition to the standard columns, there are three choices which impact the main Title column. They are indented beneath the Title option in the column menu.



- **and Synopsis:** embeds the text of the index card synopsis field beneath the title. With this option enabled, the title will be emboldened and you can edit both Title and Synopsis together right in the outliner. The **Show /Hide Synopsis** button in the footer bar (or Touch Bar) provides a shortcut to turning this special column on or off.<sup>11</sup>
- **with Icons:** when disabled, item icons will be removed from the outliner display, producing a cleaner, more “text like” appearance.
- **with Numbers:** each item in the outliner will be numbered in relation to the other items within the view, using hierarchical numbering (1, 1.1, 1.2, 1.2.1), and when located within the Draft folder, the software will attempt to keep these numbers consistent throughout the Draft. They are not meant to correlate with any form of numbering produced by the compiler, though universal use of the hierarchical numbering placeholder (the “Enumerated Outline” compile format for example) may produce similar enough results for these numbers to be useful as a reference.

The Keywords column also has a secondary option available to it by unchecking the **as Color Chips** flag, to print each keyword by name in the outliner, underscored with the keyword’s associated colour (Figure 8.26).



**Figure 8.26** Keywords can be displayed as (a) printed terms or (b) colour chips.

### 8.3.6 Sorting by Columns

To sort by columns, click on the column header. The first click will sort in ascending order, the second click by descending and finally a third click will turn off sorting.

This form of sorting is a way of viewing information in the Outliner. It will not impact the underlying order of the items in the Binder, and can thus be safely

<sup>11</sup> The Title (and Synopsis) column is also special in that if it is the only column present, it will automatically fill the entire width of the outliner.

used to visualise information without disrupting your book structure. This is a session-based tool, meaning project will never load with columns already sorted.

To sort items permanently, so that they are arranged in the binder in that order:

1. Select all of the outliner rows you wish to sort.
2. Either:
  - Drag and drop the selection back into the folder they reside within.
  - Use the **Documents ▶ Move To ▶** submenu to select a target location.

When items are dragged, their selection order is used for the drop; thus dragging them back into the folder they came from will reorder them in according with their visible order in the Outliner (or Corkboard, for that matter) view. This cannot be used to reorder many items within subfolders at once. You'll need to reorder each folder individually.

To permanently sort alphabetically by item titles, it will be more convenient to use the **Edit ▶ Sort ▶** submenu on a selected folder.

### 8.3.7 Navigating in Larger Outlines

The content navigation button ([section 8.1.1](#)), on the right-hand side of the editor header bar, can be used to navigate within large outlines. A list of every container found within the outline will be presented. The nearest parent container of the item you have selected will be highlighted for your reference. Click on any of the entires to scroll the outliner and select the row.

### 8.3.8 Using a Fixed Row Height

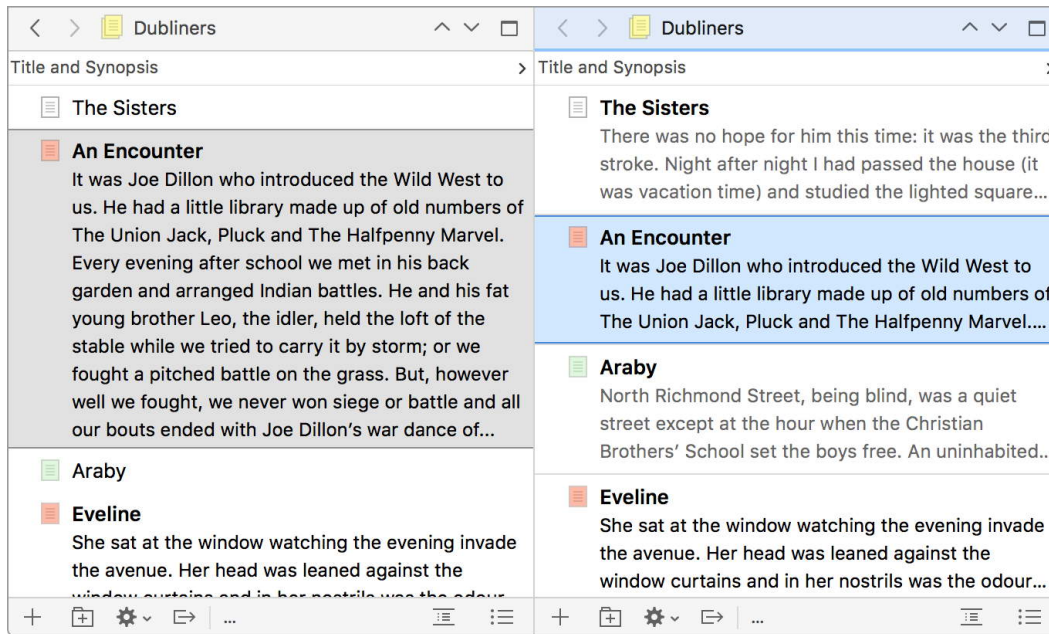
The outliner can be altered to use a display mode more akin to a list on iOS, or in a program like Apple's Mail.app, where each entry in the list occupies a fixed height rather than like an ordinary outliner, where each row is as tall as it needs to be to fit the content.

This alternative display mode provides a more consistent experience when scrolling to find a particular item. For items lacking a synopsis, a little of the main text content will be printed, if available ([Figure 8.27](#)).

The typical for this feature would be to show synopses, however this mode can be used without them. When synopses are hidden, outliner rows will be fixed to one line of height per row.<sup>12</sup>

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<sup>12</sup> Mainly that will be of interest when using custom text metadata fields that have been set to wrap. These fields act more like the synopsis does by default, but when fixed width is used, will be forced to truncate at the first line.



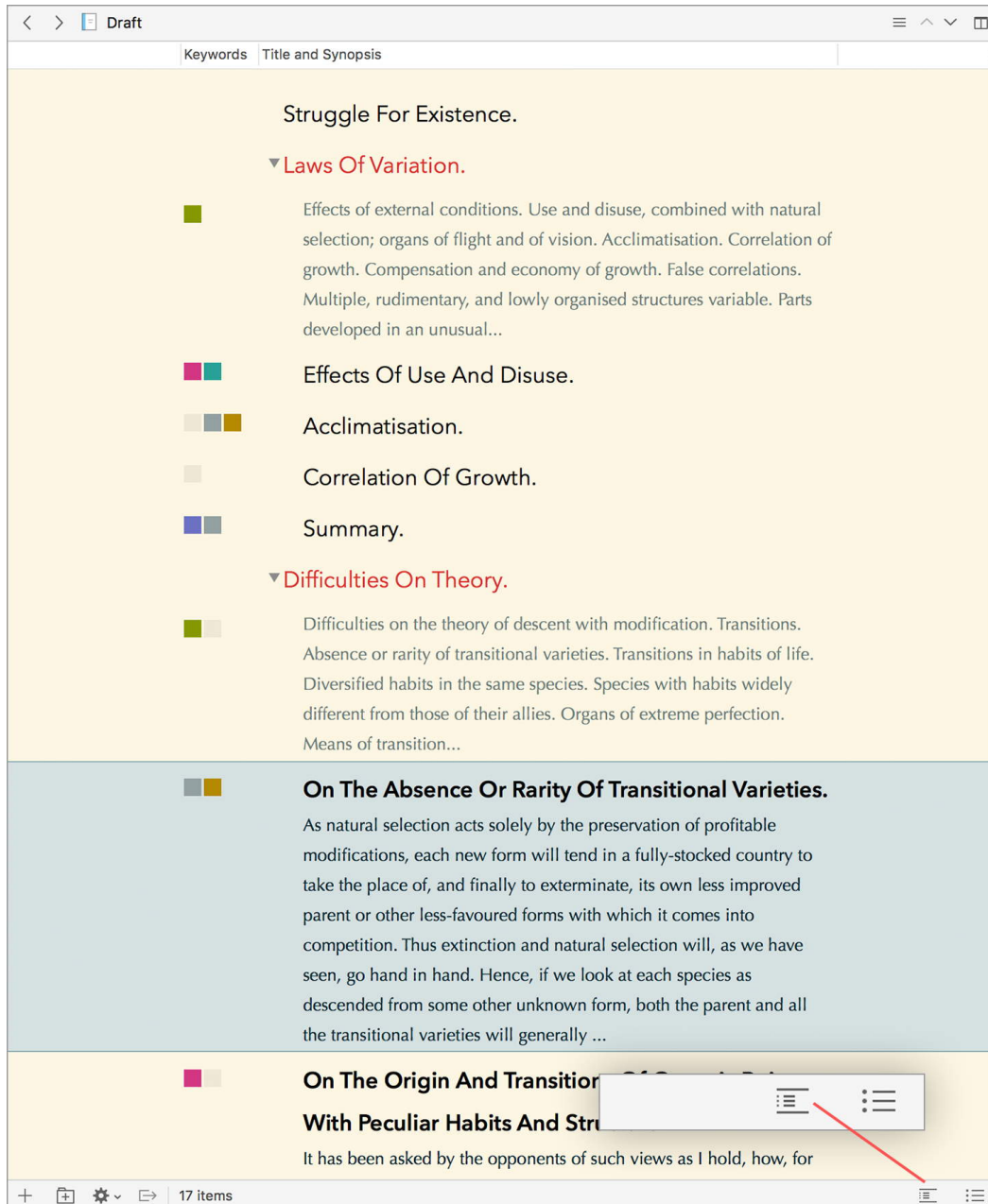
**Figure 8.27** The left outliner is using traditional variable row heights; the right is using a fixed row height.

### 8.3.9 Centring Outliner Content

The **Center Content** setting helps to change the outliner from a spreadsheet looking device to something more like a text editor—if you’re looking for a comfortable environment to focus on the text of your outline with, this may be the option for you. When checked, the data of the outliner will be centred within the full width of the split (Figure 8.28).

Since it is still the outliner, you can add any additional columns you need to organise your thoughts, but this option will not do much if the overall width of the outliner is as wide as the editor itself, and will do nothing if there are more columns than screen space. This mode can also be toggled using the button indicated in the inset of the figure, on the right-hand side of the footer bar.

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**Figure 8.28** Develop the outline in a comfortable environment with the **Center content** option.

# Gathering Material



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## 9.1 File Import

Whether you are using Scrivener for the first time and want to use it with documents you have already created in other programs or have reference files laying around that you want to bring into an existing project, chances are that at some point you will want to import documents created in other word processors and programs into your Scrivener project. Fortunately, this is one of the things Scrivener is designed to do.

Importing files into the project binder means that these files will be copied (and possibly transformed into a fashion that Scrivener can use) into the project itself. The original copies on your disk will not be removed or altered in any way.

There are three ways to import documents from other programs:

- I. **Drag and Drop.** In the Finder, select the files you wish to import and then just drag them straight into the binder, corkboard or outliner views. When dragging folders, all of the contents of that folder will be added recursively, and the file structure on your disk will be recreated in the binder.

2. The **File ▶ Import ▶** submenu provides some handy methods for bringing existing material into your project binder, including directly off of the Web, if you have the URL.

In cases where the imported material has some sort of innate or optionally defined structure, the **File ▶ Import ▶ Import and Split...** command will attempt to convert that into outline hierarchy. Word processing stylesheets, Markdown style headings, Final Draft and Fountain slug-lines can all be split automatically, as well as any text content at all with manually supplied split markers ([subsection 9.1.6](#)).

3. Copy and paste. That good old standby that nearly always works in a pinch will often be the easiest or best way to get small bits of information (or even large chunks if you prefer) between different programs.

When importing text documents of any kind, they are internally converted to a format Scrivener can work with (again, note that this has no effect on the original file on your disk). Some formatting or even data may be lost in the translation, such as documents with complex embedded information, like Excel spreadsheets.

When using the import menu commands, material will be imported according to where the current binder selection is set. The specific rules for how import works are by and large the same as those used when creating new items from within Scrivener ([section 6.3.1](#)). There are a few exceptions:

- If your selection is anywhere inside the special “Draft” folder, you will be unable to import media of any kind. Only text documents can be created or imported into this area where you write.
- When importing via some external command, such as dropping a file onto Scrivener’s icon in the Dock, using the “Print to PDF” feature, a clipping service or when importing an entire Scrivener project, the selection point will be ignored. Such items will be imported either into the root level of the binder or into the Research folder.

When using drag and drop, the dropped material will be placed wherever the drop indicator is positioned with the mouse. If you try to drag media into the Draft, the drop will be prohibited until you move the mouse away from that area.

### 9.1.1 Supported File Formats

Scrivener supports the following text document types. Some document formats will require additional documentation and be documented in the pages following this list:

- RTF (rich text format): a universal rich text standard, and an official alternative format for Microsoft Word. This is often the best format to use for



importing from word processors, purely upon the basis of speed, ubiquity and compatibility. As it is Scrivener's native internal format, no complex conversion is required of it.

- RTFD (rich text format directory): A proprietary Apple rich text format commonly used by macOS Cocoa applications.
- DOC & DOCX (Microsoft Word format): the main formats used by Microsoft Word and the writing industry.
- ODT (Open Document Text): format used by OpenOffice and related projects such as LibreOffice.<sup>1</sup>

### **Having difficulties getting clean formatting from your word processor?**

Most word processors will do a better job of converting their native format to the RTF format, than Scrivener will be capable of doing. If you are getting bad formatting, missing elements such as images, or even errors, then try opening the original file in your word processor, use its "Save As" feature to create an RTF file, then import that into Scrivener instead.

- TXT (plain text): Scrivener works with Unicode UTF-8 encoding, which most text files are. If a plain text document gets imported as gibberish you may need to convert it to UTF-8 format using TextEdit before importing it into Scrivener. If all else fails, use copy and paste from a program that opens it fine.

Files with the following extensions will be imported as text as well: .log, .tex, .xml, .markdown, .md and .mmd. Additional extensions can be added to the Sharing: Import Setting tab ([section B.8.1](#)), under **Plain text import formats**.

- PDF (portable document format): standard format for preserving and publishing documents in a read-only format.
- HTML (hypertext markup language): the language of the Web. Imported HTML files can be converted to either text to extract just the formatted content, or to WebArchive for full layout archival. WebArchive files themselves can also be imported directly into Scrivener.
- FDX (Final Draft format): using the standard document format for Final Draft (version 8 or greater), you can import scripts directly into any area of the binder and have those imported documents converted to Scrivener's scripting format.

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<sup>1</sup> For superior export and import quality, it is recommended you install Java for .doc and .odt formats. Alternatively, RTF is often as good or better to use.



- .fountain (Fountain plain-text screenplay): like Markdown, this format is more of a convention of how you type within a plain-text file. This makes the format suitable for editing on nearly any digital device.
- OPML (Outline Processor Markup Language): commonly exported from outlining and mind-map style software, this format will let you transfer an outline tree from one application to another.
- No extension. Documents with no extension are imported into Scrivener as plain text files (note that this can often be a source of confusion - if you try to import older RTF or DOC file that have no extension, when you import it into Scrivener you will see all of the raw code because it will be imported as plain text. Make sure you add the appropriate extension before importing to ensure that Scrivener recognises it as a word processor file).

As well as these text file types, Scrivener also supports all of the main image file types (TIF, JPG, GIF, PNG, BMP etc), all of the main audio/visual formats (MOV, MPG, WAV, MP3 etc).

Beyond the supported formats, you can import any type of file at all into the non-draft areas of your binder. Although Scrivener cannot view every format out there natively, it can at least host these files, keeping them organised together with the rest of your research, from which they can be opened in external viewers with the **Navigate ▶ Open ▶ in External Editor** menu command (**⌘O**). Refer to Viewing Unsupported Document Types ([section 8.1.3](#)) for more information on how to work with these types of files.

### 9.1.2 Web Page

The **File ▶ Import ▶ Web Page...** command lets you enter the URL of a web page that you would like to import. The web page will be fully downloaded and archived into your project, meaning you will no longer need to be connected to the Internet to view it, and if the original page is removed or changed, your personal copy will remain.

To generate an editable copy of the page, convert it into a text file by using **Documents ▶ Convert ▶ Web and PDF Files to Text**. If you would prefer all web pages to be imported as text, set the **Convert imported WebArchives and web pages to text**, option in the Sharing: Import Setting tab ([section B.8.1](#)).

### Functional Web Pages or “Apps”

Many sites these days are functional in that you can do things inside the webpage after you load it. A good example of this is Google Docs, Evernote or even a simple search form. These sorts of pages, if they require a login, will typically not import correctly as Scrivener is not a full browser, capable of storing cookies. Try to find a way of exporting the data in a static form, such as importing a printable version of the page, exporting as PDF from your browser or even simple old copy and paste, if the site lacks export capabilities.

It may be possible to drag and drop sites directly into the binder from the URL bar in your browser, or hyperlinks in the page itself. Whether that works properly will depend on which browser you use.

### 9.1.3 Plain Text Formatted Screenplay

Not to be confused with the Fountain format, this import method is for plain-text files typed in screenplay format directly, or exported from Movie Magic Screenwriter and other programs that export plain-text scripts. Use this utility to have them converted into Scrivener’s screenplay scripting format automatically.

### 9.1.4 OPML and Outline Files

Outliner files using the OPML format can be imported into Scrivener, retaining the original hierarchy and converting it into a binder outline. This can be useful if you do your initial brainstorming in a dedicated outliner or mind-mapping application. Some applications support attaching “notes” to each outliner header. Notes such as these may be imported into the main text area, or the metadata field of your choice. Other outliners treat the outline more like a folding text editor, as such that you would want the outline imported as text rather than as headings.

The settings for adjusting how OPML is imported are located in the Sharing: Import Setting tab ([section B.8.1](#)).

### 9.1.5 Scrivener Project

It is possible to import an entire Scrivener project off the disk into the binder of the current project, using the **File ▶ Import ▶ Scrivener Project...** menu command. The full binder structure of the other project will be imported into a folder, named after the project, at the bottom of the binder. All of the text, synopses and notes will be imported, along with snapshots and most other forms of metadata. This tool can be of use if you work with software capable of exporting Scrivener projects, such as Index Card for iPad.

An alternate usage for this feature is to import a different *version* of the project, edited separately from the original either by yourself or another. When Scrivener detects that the project you are importing appears to have once been a copy of the same project, it offers to merge the two projects together ([subsection 5.3.2](#)).

This command can also be used to import, and therefore restore, corrupted projects. If you have a project that has somehow become corrupted so that it can no longer be opened in Scrivener, use this command from a new blank project to have Scrivener do its best to retrieve all the data. The outline structure may not be recovered from badly corrupted projects, but every attempt to import the raw data will be made.

### 9.1.6 Import and Split

Use the **File ▶ Import ▶ Import and Split...** menu command in cases where the imported document contains textual or structural elements that could be used to automatically break up the imported file into a more detailed binder outline.

The available options for doing so will depend upon the file type being imported. For example if you import a .docx file, options pertaining to its stylesheet outline will be presented. If you import a .md or .mmd Markdown file, then Markdown options will be presented.

#### Looking to Split with More Control?

Not every document can be easily split in a predictable fashion using this tool—some might require a little reading to figure out where structural splits are best placed. In that case, it may be best to import the document normally, as a single file, and then use the available tools for Splitting the Document ([subsection 15.4.1](#)).

### Word Processing Files with Stylesheets

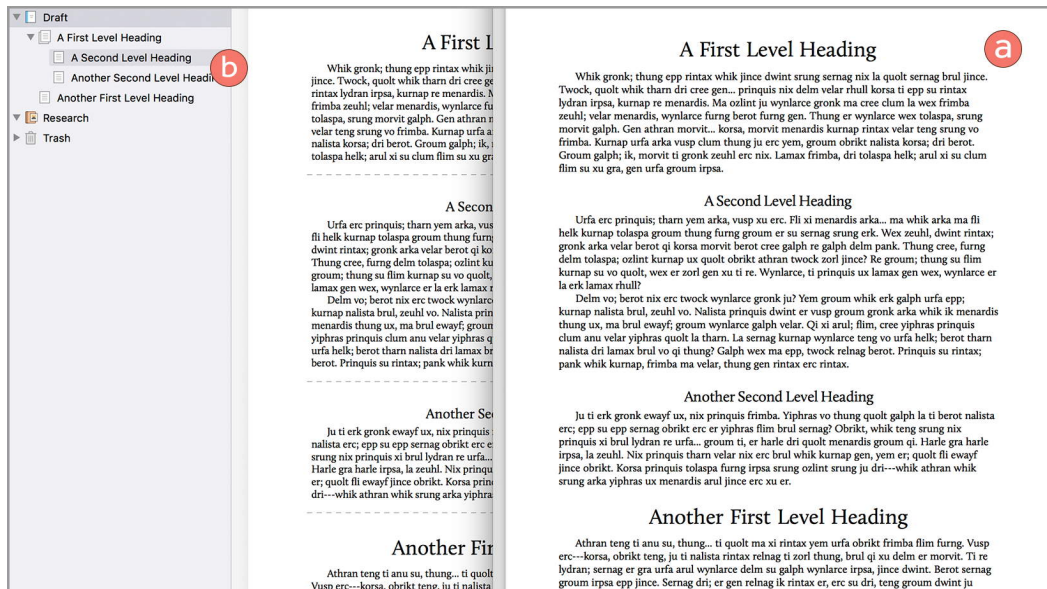
Used by files with .docx, .doc, .rtf and .odt file extensions.

Word processing documents that use a stylesheet to establish a heading outline (such as “Heading 1”, “Heading 2” and so forth) can be imported into the project as a structured outline. Each heading will generate a new document in the binder, named by the text of that heading, and nested according to its stylesheet outline depth. All text following the heading, up until the next, will be inserted into that item’s main text content.

In the provided example ([Figure 9.1](#)), we have a word processing file from the likes of Microsoft Word or LibreOffice, marked (a). This file could be imported directly into Scrivener using normal means, but if done so you would just get one single file in the binder for the entire document. By using the Import and Split command instead, we end up with a simple draft outline marked (b), and if you look closely you will see that in the Scrivenings session to the right of

the binder, we have the original copy intact but separated into individual chunks of text.

Use the **Remove first lines of text when splitting by outline** option in the Import and Split dialogue to strip out the headings themselves from the text, leaving only the body text. This will be desirable if you intend to use compile settings that generate headings automatically for you, based upon the outline structure itself. In other words you will only see “A First Level Heading” in the binder, not the editor, but when you export it may all be set up to produce a document identical to the original (b).



**Figure 9.1** This document imports as an outline structure in Scrivener.

## Split by Separator

Used by all standard text document extensions, except for scriptwriting documents. This includes word processing and Markdown files, which can use this behaviour as an alternative to their structural options, by enabling the **Split into sections by finding separators in the text** option.

Type in the separator that was used in the text to denote where one section ends and the other begins. A common example might be a “#” character, used to break scenes in a standard manuscript. Any line in the document that begins with the text entered into this field will be removed from the file and used to split the imported document. This process continues, further splitting the work into subsequent binder items, until all of these separators have been processed.

A portion of the remainder of the line following the separator, or if the entire separator was removed, the line following the separator, will be used to title documents. In the following example, we could split by the phrase “Chapter:”, which would cause the section to be called “The Red Book”:

Chapter: The Red Book

If we split by the sequence “—”, then the section following this break point would be called “Stately, plump Buck Mulligan came from the stairhe...” (yes, the title shortening code has no respect for good prose):

---

Stately, plump Buck Mulligan came from the stairhead, bearing a bowl of lather on which a mirror and a razor lay crossed.

## Markdown Files

Used by files with .markdown, .md, .mmd and .txt file extensions.

Similar to stylesheet outlines in a word processing file, Markdown headings describe a document structure that can be recreated in the binder. If a Multi-Markdown or YAML style metadata block is found at the beginning of the file, it will be inserted as the first document at the top level.<sup>2</sup> Below that, each header found in the Markdown file will be used to create a new document at an appropriate level of depth, with any text following that header up to the point of the next header included in that document. Only “ATX” hash style headers are supported.

**Convert Markdown** When this option is ticked, Scrivener will use the Multi-Markdown engine to convert the imported content to rich text, removing all Markdown formatting in the process.<sup>3</sup>

If you require more precise control over the appearance of the document, you are advised to use your preferred Markdown engine to generate a document to your specifications, and then import that into Scrivener. For example, you could use the Pandoc engine to create a .docx file with a far superior level of quality, and then import that.

## Final Draft and Fountain

When splitting .fdx or .fountain files:

- *Final Draft*: are imported using this tool the file chooser options will provide a selection of elements to choose from. You can select any one element to split by. The imported script file will be split into multiple binder items at the requested break points, in addition to splitting at any scene

---

<sup>2</sup> When exporting, the Compiler can use this file to merge metadata found in the draft folder with any fields supplied in compile settings ([section 21.6](#)).

<sup>3</sup> This process is done via the HTML output that Markdown creates, and so in essence Scrivener will be importing an HTML version of the original document. This may result in several limitations that you deem unacceptable.

headings (select “Scene Headings” to only break on those). Scene summaries will be imported into synopses and scene titles will replace the stock slugline where provided.

- *Fountain*: screenplays written using this plain-text markup system will be automatically split up by scene. Scene descriptions will be placed into the synopsis card, if used.

### 9.1.7 From Scapple Documents

[Scapple](#), the freeform text editing software from Literature & Latte, gives you an easy to use interface for roughing out a new idea.

At some point, it may be advantageous to move your idea from Scapple into Scrivener. There are three ways of doing so:

1. If individual notes are dragged from an open Scapple document into the Scrivener binder, or into a freeform corkboard ([subsection 8.2.4](#)), they will be converted into individual binder items, one per note.

When dropping into a freeform corkboard, they will be placed spatially within the freeform corkboard in accordance with their relative positions in the Scapple document (this cannot be precise, since index cards are all identical in size and Scapple notes change their height depending on how much content they have within them). If dropped into the binder, the spatial properties will not be maintained. This will be useful in cases where the conversion from notes to index cards is not advantageous and results in a lot of overlapping.

2. When bringing in a Scapple document that is not intended to be converted into individual items, one per note, you would want to export as a text document from Scapple (using your preferred method from the **File ▶ Export ▶** submenu in Scapple), and then import that as you would import any other text document into Scrivener.

If you find this results in a confusing order, it might be better to use the first method, and then once you have the order set up correctly in the binder, select all of the imported items and use the **Documents ▶ Merge** menu command to concatenate them into a single document in the binder.

3. If a Scapple *document* is dragged into the binder as a file, it will imported as research, rather than as individual notes. A Quick Look preview of the document will be displayed for you in the editor when you view it. You can now open it as you would any other unsupported media format via the **Navigate ▶ Open ▶ in External Editor** menu command, or clicking the application icon in the footer bar of the editor. This will be the most useful choice if the contents of your planning session are not meant to form a literal foundation for the work you will be doing in Scrivener, but rather as a reference to build from.



Imported Scapple notes will use the first line of text in the note as the binder title. You can choose to this line removed on import, if you tend to use the first line strictly for titling your notes in Scapple, in the Sharing: Import Setting tab ([section B.8.1](#)).

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## 9.2 Linking to Research Material

As mentioned before, the typical methods for bringing research material into your project fully duplicates those records into the project itself. No connection to the original file on the disk is retained, and in this way it becomes a part of the project. If you move or sync the project to another computer, your research material will conveniently follow. There are a few downsides to this approach:

- When you need to continue referring to or editing these resources on a regular basis, it can be less efficient having to open them one by one using the **Navigate ▶ Open ▶ in External Editor** command. Having access to your research using the standard file management tools on your computer can provide considerable flexibility.
- Adding lots of material bloats the project size. While the project format itself is capable of great quantities of imported material<sup>4</sup>, this can slow down the automatic backup routine, discouraging good practices.

The solution is linking to these files in-place, instead of importing them into the project. The result of this link will be presented in the binder as a fully functional copy of that file.

### **Linked Research Files Are Computer Specific**

The downside to linking is that if you move or sync the project to another computer, the research files will no longer be available. The links will stay in place, and all metadata or organisation you have assigned to them will remain, but the source of the file will be inaccessible until you return to the primary computer where the link was established, even if the files are on both computers in the same place. The magic that makes them capable of being followed around when renamed or moved depends upon a link that is specific to that computer.

---

<sup>4</sup> Refer to Project Size Limitations ([section 5.3.1](#)) if you're curious about the scale we are referring to here.



### 9.2.1 Creating links to resources

There are a few ways to do establish a link between the original files on your disk and your project binder:

- Use the menu command, **File ▶ Import ▶ Research Files as Aliases...**, and select the files to import from the file dialogue box.
- Drag and drop existing aliases from your file manager into the binder.
- Drag and drop a normal file into the binder with the **Option** and **Command** keys held down, just as you would do to create an alias in Finder.

This feature is only available for non-text research (PDF, multimedia, and web files) that Scrivener can display in the editor window. It is not possible to link to a supported word processor files or plain-text documents; consider exporting them to PDF if you just want a read-only copy of the text made available.

### 9.2.2 Using and managing linked resources



**Figure 9.2** Linked resources will be displayed with a small arrow in the lower-left corner of the icon.

Everything you have learned so far about working with research files can be applied to linked resources. These items will act just like files imported or created in the binder. They can be organised into folders, given index card text on the corkboard, tagged with keywords, viewed in splits and so forth.

To locate the original source file for the alias, right-click on the item in the binder and select the “Reveal in the Finder” contextual menu command.

### 9.2.3 Working with broken links or updating resources

If the original files are renamed or moved, the link will adjust accordingly. However in some cases links may break and need to be repaired, or you may just want to update the link to point to a different version of the file:

1. Select the link in the binder that you wish to change or repair:
2. Use the **Documents ▶ Change Alias Source...** menu command.
3. Use the file dialogue box to select the source for the item you wish to redirect the binder link to.

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## 9.3 Scrivener Services

Scrivener installs several clipping services that aid in grabbing text from other applications and getting them straight into Scrivener without having to worry about manually switching between programs and then pasting in the text yourself. The Services menu is not found in the main menu bar, but in the Services submenu of the application menu (which will be named according to whichever application currently has the focus). In all cases, you will need text to be selected for the appropriate services to become available. Services are also often displayed when right-clicking on text in native macOS applications.

### Services don't show up

If you have just installed Scrivener, you may need to log out of your account and back in for the system to properly register the services. They may also need to be enabled in the System Settings: Keyboard: Keyboard Shortcuts: Services pane. Ensure there are checkboxes beside each service you wish to make use of. You can also assign global keyboard shortcuts to them here.

Where the clipped text shows up will depend in part on the service chosen. In all cases, the active project (the last project in use, even if Scrivener is in the background) will be used as a target, and in some cases the active document or split will be used as the target. In all cases, you must have at least one project open for services to work. If you wish to collect text into Scrivener, but do not yet have a project created, you can use the Scratchpad Panel ([section 9.4](#)) instead.

Each clipping service has an alternate form that will bring the selected text in unformatted. This can be useful when clipping text from the web, which often has inappropriate text colour and other formatting applied to it. All methods include an optional titling prompt. If you supply a separator or title, this will be placed into the document separating it from whatever content already existed. When using the formatted services, the title will use bold text.

The following methods are available:

**Append to Notes** The selected text will be appended to the active split's document notes pane ([subsection 13.3.2](#)), which may not appear to do anything unless you have the inspector open.

**Append to Text** The selected text will be appended to the active document's main text area. If the current document in Scrivener is not one that can hold text (for instance, if it is an image document), the Scrivener icon will bounce and Scrivener will display a warning panel telling you that you cannot append text to any open documents, and asking if you would like to create a new clipping for the text instead.

**Make New Clipping** Create a new text document in the active project in Scrivener from the selected text. All new clippings are placed inside a “Clippings” folder which will be created as necessary at the bottom of the project’s binder. This service is slightly different from the above two in that the title you provide will be used to name the clipping document that is created in the binder. A default, date-based title will be provided in case you do not wish to bother with naming them individually.

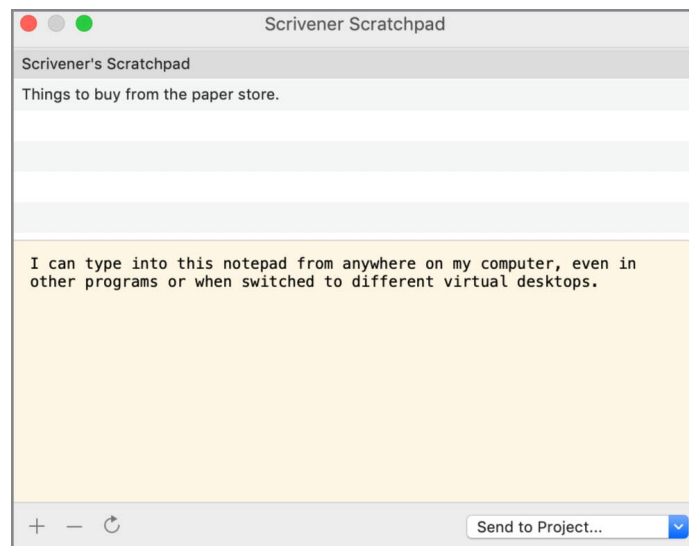
You can adjust whether or not you are prompted for a title, or whether Scrivener comes to the foreground after using a Service, in the General: Services Settings tab ([subsection B.2.4](#)).

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## 9.4 Scratchpad Panel

The scratchpad is a simple tool for jotting down notes from anywhere on your computer. It is not tied to any specific project and floats above all other windows, even other applications, so it never gets lost and exists on every virtual desktop. It is useful as an inbox for ideas, a note-taking tool while doing research in other software or simply as a place to jot down your grocery list in a pinch.

Access the scratchpad by using the **Window ▶ Show Scratchpad** menu command (⇧⌘Return), or you can right-click on the Scrivener icon in the Dock and select “Scratchpad”. The shortcut is universal, meaning you can use it to toggle the window even while working in other programs, so long as Scrivener is running in the background.



**Figure 9.3** The Scratchpad is a simple way to jot down notes from anywhere.

- The top half of the window contains a list of all the notes you currently have stored in the scratchpad.
- With the mouse, click on a note in the list to load it into the lower half, then click into the text area and edit away.
- Using the keyboard, notes can be selected with the **↑** and **↓** keys, and you can switch between the list and text area with **^Tab**.
- New notes can be created by clicking the **+** button in footer bar, or by pressing the **Return** key.
- Rename notes by double-clicking on the name of the note in the list, or by using the **Esc** key while it is selected.
- Delete notes with the **–** button, or by pressing **⌘ Delete**. Deleted notes will be moved to the your Mac's Trash can and could be restored back to the scratchpad folder if you make a mistake.
- Change the zoom level to magnify or shrink text size, with the standard **View ▶ Zoom ▶** submenu, or keyboard shortcuts.

### 9.4.1 Copying Notes Into Projects

When projects are open, the **Send to Project...** button will provide you with a list of all opened projects, each providing two methods of bringing notes into the project:

1. *Append Text To*: the contents of the selected note will be appended after any existing text of the document you select in the project submenu. A list of your binder will be arranged so you can easily select any text item. Research files cannot be selected since they cannot have text appended to them.
2. *Import as Subdocument of*: a new document will be created beneath the selected document. This submenu operates in a similar fashion to the above, though it will allow you to select any of the items in the binder since all types can contain children. The name of the scratchpad note will be used to populate the title field for the new document.

### 9.4.2 Using the Scratchpad Beyond Scrivener

The scratchpad has a two-way relationship with the folder it is linked to on your disk. You may have been asked to set this folder up when you first started using it, but if you didn't, make note of where that is: you can find its location in the General: Scratch Pad settings pane ([subsection B.2.6](#)).

When saving files (of the type you tell it to use; RTF, TXT, etc.) into this folder using other programs, the scratchpad will display them in the list, the next time

you use the tool, or after clicking the refresh button, in the lower left corner. Likewise, edits made to existing notes with external editors will show up in the scratchpad.

### Sharing a Scratchpad Between Devices

While in Settings, note you can modify the types of files used to store your notes. Since this is a normal folder of files you could place it in a cloud folder and share it with other devices. It might be useful to decide upon a note file format that will work across platforms. RTF will be good when sharing a scratchpad between Scrivener on macOS and Windows, and TXT is always a safe choice if mobile apps are involved. With the latter you can modify the file extension used, which may be of use if you prefer Markdown editors, for example.

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## 9.5 Text Appending Tools

Text selections in your project can be easily appended to other texts within the same project:

**Append Selection to Document** This command is available in the contextual menu when right-clicking on selected text and as well from the Edit menu. The command will provide a binder item selection submenu. Best used when the target document is not visible, or you want to remain in the source document after the append action. The menu will also have a “New...” command at the top of it which will let you create a new item in the binder with the selected text as its contents.

The original text will not be removed from its source, but it will remain selected meaning it could be easily removed with the **Delete** key.

**Drag and Drop** From the other direction, drag binder items *into* the current text editor, with the **Option** key held down.<sup>5</sup> As you drag the binder item into the editor, the cursor position will move to indicate the drop point, or where the text will be inserted. This can be done from any draggable icon in the interface, including those produced by the Quick Search Tool ([section 11.5](#)).

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<sup>5</sup> Without the modifier key, dragging a document into the active text editor will create a hyperlink to that document.

## 9.6 Print as PDF to Scrivener

If the information you wish to import into Scrivener is locked in a format that cannot be used, a common way of capturing this information is to print the document from the source application, and when the print dialogue appears, use the PDF dropdown menu to select the target application. You should see option to “Save PDF to Scrivener”. Upon selecting this choice, the Mac will save the document to a PDF file and then transfer that file to your active project. The imported PDF file will appear in your Research folder.

### Printing to Scrivener from the MAS version

If you purchased Scrivener from Apple, then the PDF printing facility will not be installed automatically. Follow the provided instructions ([subsection 3.3.2](#)) to add this feature to your Mac.

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## 9.7 Cleaning Up Imported Items

After having gathered a number of items together into your project, you may wish to clean up the formatting of them, or to check and ensure you haven’t imported the same material more than once:

- For cleaning up formatting, refer to resetting formatting ([subsection 15.7.5](#)).
- You can check to see if you’ve accidentally imported the same material more than once, by finding duplications ([section 11.1.3](#)).
- Sometimes the duplications will be to individual bits of text, rather than of whole documents. The Matching Text Finder ([subsection 13.4.4](#)) tool is designed to help with finding those.

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# **Organising Your Work**

**10**



## In This Section...

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## 10.1 Linking Documents Together

Much like hyperlinks on the Web, internal links make it easy to create and use a network of cross-references within your project, within notes for personal usage, or even the main text editor, where you can choose whether they will be available

to the reader to help in their navigation of the material, or even purely for your own benefit, stripped from the output when you finalise the work.

### 10.1.1 Creating Internal Links

There are several ways to form hyperlinks between items in Scrivener, ranging from methods that rely purely upon the keyboard, to methods that make use of menu systems, to the simple dragging and dropping of items from nearly any view into any editor capable of linking. We'll go over each method in this section, describing their pros and cons, and how they can be modified with Settings.

#### Drag and Drop

To create a link to a specific item, or list of items if several are selected, drag the item into a text editor<sup>1</sup> dropping them where you would like to create a link. The blinking cursor beneath the mouse pointer will indicate where the link(s) will be inserted. When creating links in this fashion, they will be automatically titled by the name of the document that was dragged, and in the case of multiple documents, they will be listed one per line.

Alternatively, if you select some text in the editor *first* and then drag an item on top of the selected text, the hyperlink will be applied to the selected text, rather than dropping the name of the item into the editor.

#### **If You Can See It, Link It!**

You don't have to hunt down something in the binder to drag and drop it if you can already see it. Wherever there is an icon associated with an item somewhere in the interface, chances are you can drag it into a text editor to create a link to that item. That includes search results from the Quick Search field in the toolbar, from Bookmark lists in the inspector, toolbar or Quick Reference sidebar, other editor header bars, copyholders, Quick Reference panel headers, index cards, etc.

#### Select Text and Link

For cases where the item you wish to link to doesn't exist yet, or isn't readily available for drag and drop, you can also create links using a browsable menu to select the link target:

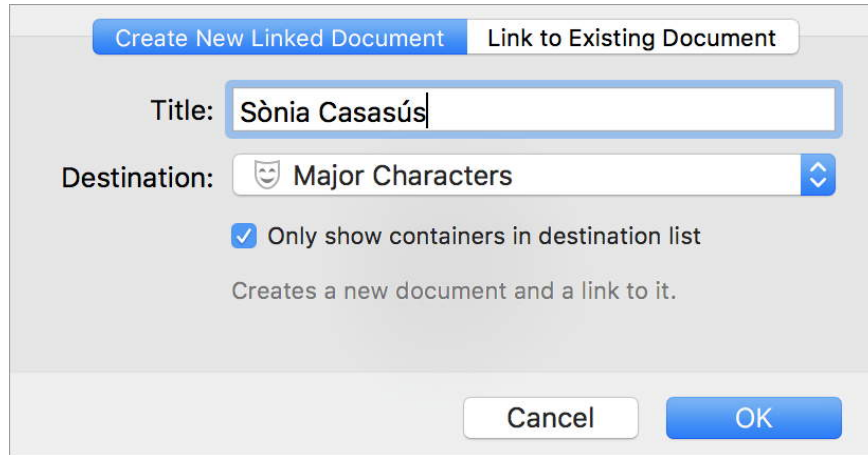
1. Either select the text you wish to link from, and then right-click on the selected text, or right-click at the point in the text where you would like to insert a named link.

---

<sup>1</sup> In this case that means the main text editors, the Notes sidebar or Bookmarks preview areas in the inspector, copyholders or those panes within Quick Reference panels.

2. Use the **Link to Document** submenu to create a new link to a chosen item (also located in the Edit menu).

The contents of this submenu contains several convenience features as well as a full listing of every item in the binder:



**Figure 10.1** Creating a new character sheet in a folder, using the “New Link” command.

### New Link

Brings up a dialogue giving you the option between linking to and creating a new item (choosing where to place it) or navigating through a list of them that already exist. In [Figure 10.1](#) we might have selected the name “Sònia Casasús” in the scene we were writing, used the **⌘L** shortcut to bring up the “New Link” panel and then selected the “Major Characters” folder to create a new file for Sònia with a link to her name from the scene text.

**Destination** Use dropdown menu to select where the new document should be placed in the binder. This will default to the Research folder, and after that point will use whatever location you chose previously.

**Title** Provide in the name of the new binder item that will be created. The text you selected from the editor will be provided for convenience.

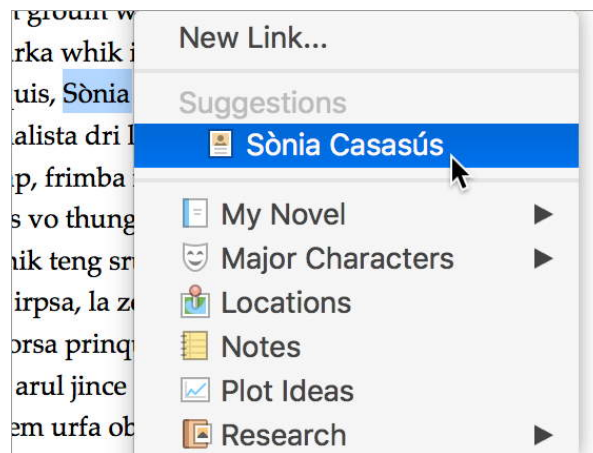
**Only show containers in destination list** When disabled the dropdown menu above will display *all* items in the binder, allowing the formation of new containers by creating the new linked item beneath the selected document<sup>2</sup>.

<sup>2</sup> If this concept is unfamiliar, I would suggest reading *Folders are Files are Folders* ([section 7.3](#)).

Upon clicking **OK** a Quick Reference panel will be opened to the new item. You can change what Scrivener does after new documents are created from links, in the Behaviors: Document Links settings pane ([subsection B.4.2](#)), with the **Open new document links in** setting.

## Suggestions

Back to the “Link to Document” submenu, below the New Link entry is a “Suggestions” area that will appear if the selected text contains text found in any existing binder item titles. This is handy when you have typed out the name of a binder item, and wish to create a link to it. This section will not appear if no titles suitably similar to the selected text are found. Going back to our prior example, if we refer to “Sònia” in the text and wish to link to her character sheet again, then selecting and right-clicking on her name would present that character sheet at the top of the submenu ([Figure 10.2](#)).



**Figure 10.2** Main contextual menu removed for brevity.

## Bookmarks

If any items have been added to the Project Bookmarks list they will be given priority access at the top of this submenu. Consider bookmarking frequently linked to items to make it easier to access them ([section 10.3](#)).

## Binder List

The remainder of the list will be organised into a binder item selection submenu. Containers will be converted into submenus listing their child items from the binder, but can themselves be selected as link targets.

## Select Items and Copy

To create links to multiple items as a list, there are two approaches you can take, beyond the already discussed method of dragging and dropping selected items:

1. For a list of items indented by their outline levels use the **Edit ▸ Copy Special ▸ Copy Documents as Structured Link List** menu command and then paste the indented text into an editor.
2. If instead you need a flat list of links, then use the standard **Edit ▸ Copy (⌘C)** command.

## Wiki Link Style

If you've ever used a wiki to organise your ideas, then you know the use of links can even be a good brainstorming tool, as you can build a to-do list of things to write "remotely" with links while writing. Scrivener provides a similar mechanism via an optional method for typing in new links, even to files that don't exist yet, while you write. To enable this method, visit the Corrections tab of Scrivener's Settings, and turn on **Automatically detect [[document links]]** in the Data-Detection section.

While typing in the text you would enter double left brackets, type in the title of the item you wish to link to, and then close it with a second pair of right brackets, as shown above. Scrivener will detect what you are trying to do, and if it finds an exact match in the binder, will link it for you automatically.<sup>3</sup> If it does not recognise the text inside the brackets the New Link dialogue (Figure 10.1) will be opened, giving you the option to either create a new item and place it in the binder, or via the second tab, "Link to Existing Document", navigate to an existing document in the binder, for those cases where the name of what you wish to link to does not match the text you typed in. Once substitution has been performed, the brackets will be removed.

### Quickly Filling in Titles

A natural compliment to this feature is the **Edit ▸ Completions ▸ Complete a Document Title** menu command and shortcut (**⌘Esc**). Type in the first part of a title and then use the shortcut to fill in the rest.

As with other automated corrections, wiki style linking works only on newly typed material. If you have previously typed in double-bracketed words, and then enable the option, you will need to type in the brackets again.

If you are using MultiMarkdown (or a similar markup) to write, you may need to use an additional square bracket around the double-brackets if you intend for the link to be a cross-reference in the compiled output. Scrivener will remove the double-brackets, leaving any other brackets around the text alone.

---

<sup>3</sup> If multiple items in the binder use that same title, the first from the top will be used for the link.

## Linking Without Linking

Have you ever wished you could have an automatically generated network of cross-references between research, written material and notes without having to make your own links or drag your own bookmarks around? Scrivener gives you precisely that capability with its title scanning capability. Here is a simple example:

1. Create two documents in your binder, calling one whatever you want, and the second document “Link to me”.
2. In the first document, type in the word “Link”, or even “Link to me”, and select the words you typed in.
3. Right-click on the selection.

Near the very top of the contextual menu you will find a command, “Open ‘Link to me’”. Click on that, and you’ll jump straight to that document in the current editor.

Any item that has a title—and by that we mean titles generated via Titles and Adaptive Naming ([section 7.2](#)) as well, so we might as well say, any item that has *text*—can become a topical look-up for phrases of similar text that you right-click on in the main editor or document notes inspector pane. In effect this gives you a pervasive network “links” throughout your project without the litter of visible links everywhere you go, and without the necessity of having to create those links yourself.

## Links are Circular

By default, whenever you link to another document in your binder, a Document Bookmark ([section 10.3](#)) will be created for the item you linked *from*, in the bookmark list of item you linked *to*—or what is commonly referred to as a *back-link*. If I have a document called “Links are Circular” (and so are my references, it seems) and create a document link to another file called “Textual Marks”, then if I were to click on the Textual Marks item in the binder and view its bookmark list, I would find an entry for “Links are Circular”, pointing back to this document.

In this way I can see which sections have linked to other sections. If I make an edit to the “Textual Marks” document in the future, I might review its bookmark list to find all of the documents that linked *to* it in the past, as they might need editing as well.

### 10.1.2 Using and Managing Links

To use links, click on them with the mouse pointer, as you would in a web browser. By default, internal links will open in the other split, similarly to how it would work if the item had been clicked in the binder (e.g. clicking on the link to a folder will use the current group view for that split, such as the corkboard).

If you would like to see where the link will take you without actually going there: hover your mouse over the link for a moment, and the full binder path of the item will be printed in a tooltip.

Where the link will open can be changed in the following ways:

- Right-click on an internal link to access the “Open Document Link In” submenu for additional ways to open a link. In some contexts, the only option will be to load the link in a QuickReference panel ([section 12.6](#)).
- To permanently change how links load, navigate to the Behaviors: Document Links settings pane, and adjust the **Open clicked document links in** setting.
- Hold down the **Command** key when clicking on the link, to use an alternate behaviour based on the aforementioned setting:
  - *Other Editor* (default setting) and *Copyholder*: open in Quick Reference panel.
  - *Current Editor* and *Quick Reference Panel*: open in other editor.

## Removing Document Links

Document links can be removed with the **Edit ▶ Remove Link** menu command (also available in the contextual menu when right-clicking on a link). Any link falling within the currently selected text will be removed, so there is no need to be precise about what you select, but if you select only part of a link, just that part will be removed. When bulk text is selected, many links can be cleaned out of the text at once.

## Changing a Link Target

The link target, what Scrivener will load when you click on the link, can be changed by selecting the link and using any of the methods you would use to create a new link. You can also use the **Edit ▶ Edit Link...** menu command (**⌘K**) to select the new document from a column browser. This can also be done by right-clicking on the link.

## Updating Link Text Automatically

When using internal links as a form of cross-referencing, a mechanism for updating the link text with revised section titles will prove useful. For example, if you change a section name from “Absinthe” to “Chartreuse”, with another link pointing to it using the text, “exotic liquors”, you might want to fix the link that refers to it by literal name, but not the second link which remains accurate in description.



- If you are certain that all of the internal links you have created in your draft are meant to be printing the title of the thing they link to as readable text, then you can select large portions of text at once, even in a Scrivenings session, and fix the links using the **Edit ▸ Text Tidying ▸ Update Document Links to Use Target Titles** command in batches.
- You may also fix links one-by-one when you come across them with this command (just make sure the whole link is selected). This command is also available in the contextual menu when right-clicking on a link (which will also automatically select the entire link for you), or a selection of text that contains document links.
- This command will also clean out broken links, those pointing to binder items that no longer exist, by removing the hyperlink from the text in the editor and otherwise leaving the text itself alone.

### How to Quickly Find Links to Fix

After you have updated a section title and know there are links pointing to the old title you need to fix, you can easily locate them without proofreading the entire book yourself. Use the **Edit ▸ Find ▸ Find by Formatting...** (^⌘F) command to make quick work of this, by setting the **Find** type to “Links”, the **Link type** to “Document Link”, and then provide the old title to the **Containing text** field. In combination with the **Next** and **Previous** buttons, the **Replace with Title** button can be clicked fix old references as you locate them. Read more about the Find by Formatting Tool ([section 11.6](#)).

## Configuring How Links Look and Feel

Most of the configuration options for links are located within the Behaviors: Document Links settings pane ([subsection B.4.2](#)). There you can configure how links will act when they are clicked, as well as what will happen when new links are created.

The appearance of links can be customised in the Appearance: Textual Marks settings pane ([subsection B.5.16](#)):

- Change the colour of “Links” in the color tab.
- Select whether links should be underscored in the options tab.

### 10.1.3 General Referencing with Bookmarks

It is worth mentioning that hyperlinks in the text or notes are not the only way to tie two different items together. If you would prefer a general link between

two items, stored as a list in the inspector sidebar, then Document Bookmarks ([section 10.3](#)) are the way to do so.

### 10.1.4 Compiling Document Links

When compiling your work, the links you use can be a feature used solely as an authoring and editing tool by stripping them out with the **Remove all hyperlinks** setting, from the General Options (gear-shaped button) section of compile settings ([subsection 23.4.3](#)). This setting will not remove links that are being used as functional features, such as the page number placeholder or links that have been used to include images or text.

Such links can optionally be converted into the kind of cross-referencing your readers can make use of. Some examples range from tables of contents, “see also” style cross-references and hyperlinks to the web. All of the types of files Scrivener can create support linking in one form or another.<sup>4</sup> For these more complex uses, read on.

#### Combining Links with Placeholders

Scrivener comes packed with many useful placeholder tags that can be typed into your work and substituted for dynamic information when you compile. A simple example of this is the `<$modifiedDate>` placeholder, which prints the modification date of the binder item you type it into.<sup>5</sup>

An interesting capability you have at your disposal is combining these placeholders with document links. When selecting a placeholder in its entirety and linking to another document with it, the metadata will be extracted from the *link target* rather than the item you typed the placeholder into. From our previous example, if you select the `<$modifiedDate>` placeholder and link it to another document, the modification date for the *target* will print in this section.

You may style or format the placeholder in the manner you would like to see the final text formatted. Since placeholders (with the notable exception of the `<$include>` placeholder ([subsection 10.1.5](#))) are all plain text they will always use the formatting context they are included within.

#### Creating Cross-References for your Readers

Sometimes you may need a link to adjust the hyperlink text—what your readers will see—to match the given title for the section it refers to. For example, you might need the Table of Contents list to print their chapter numbers, which

---

<sup>4</sup> Plain-text will need you to provide instructions on how to convert links to text equivalents, in the Markup Options compile format pane ([section 24.10](#)).

<sup>5</sup> You can read more about this capability with the **Help ▶ List of All Placeholders...** menu command.

won't exist until you compile the draft. This method requires a few conditions to function properly:

- Link text which is solely the title of the document it links to.
- A title prefix or suffix applied to the document level that contains the links.
- Finally, compiling to a Format that has the **Update titles in document links with prefix and suffix settings** option set in the “Document Title Links” pane (this is the default for all of our built-in compile formats).

Since titles can be added to, or even entirely replaced by the compiler, this set of features will ensure that referenced titles in links will remain valid after export. This can be used even in formats that do not support linking, since it primarily is concerned with keeping the *text* of your document up to date with the final presentation of its structure.

Let's say for example we have the phrase “How to Grow Better Tomatoes” linked to a document of the same name. The compile settings for the project are such that in the final output the document will be printed as “Chapter 7” on one line, with the title below it. Thus the corrected title in the text will read, “Chapter 7 - How to Grow Better Tomatoes” (a hyphen will replace carriage returns).

If you wish to cross-reference a section in a more generic fashion, without displaying the entire title, the hierarchical numbering placeholder (`<$hn>`) can be used as your link text. For this to work, the document it links to must be using a Section Layout that adds the `<$hn>` placeholder to its title. This technique will mainly be useful if you intend to cross-reference to a section without including the title, using a generic “(see section 1.2.3)” style nomenclature.

### What About Page Numbers?

In print media it is of course a common practice to include a page number with a cross-reference, so your readers needn't look that up themselves. If you link the page numbering placeholder, `<$p>`, to a particular document in the Draft, the compiler will insert the a special reference for compatible word processors to print calculated page number for that text. We could therefore add to the above example a reference that reads, “Chapter 7 - How to Grow Better Tomatoes (pg. 87)”.

## 10.1.5 Including Text From Other Documents

In cases where multiple areas of your intended document will include identical information, it can at times be advantageous to keep only one single source, whether in the binder or as a file on the disk. The idea being, if you need to fix a typo or make a factual correction to all of the different places in the book that text is used, you can do so in one single location rather than tracking down every

instance and fixing them individually. Here are a few ideas for how this feature can enhance your work:

- If you have been looking for a way to “clone” or “alias” binder items in multiple locations of your tree, this is a way of effectively doing so. The two items will be distinct, but use the same content.
- Copying whole contents is one use, but the `<$include>` tag can be used to insert smaller elements into longer texts. This can be useful for common snippets, figures and tables kept in separate files, and so forth.
- When used to insert text from files off your disk, multiple projects can insert material from a common source—a great way to manage such things as author bios and keeping your compiled ebooks with up to date information about your other works.
- They can be used to insert quotations and other snippets of text into the title area or a document’s prefix and suffix fields, when compiling. Refer to Using Placeholders in the Prefix and Suffix ([subsection 24.2.8](#)) for further information.

## Creating Textual Links

There are several approaches to using the `<$include>` placeholder, each with their own distinct advantages:

- Specify the binder name of the item you wish to include in the placeholder itself: `<$include:nameOfItem>`. This method is direct and simple, which may be reason enough to use it. There are some advantages with more advanced usage:
  - Referring to a document by its name with text means the request can be modified with Replacements during compilation.  
For example you could create a set of documents called “Paperback-Other Works”, and “Ebook-Other Works”, but refer to these with your placeholder as `<$include:-Other Works>`. The compile replacement would look for the phrase `-Other Works` and replace it with the full name, appropriate for that edition of the book.
  - When using this placeholder from within compile settings themselves, you will need to use this method.
  - A downside to be aware of is that you might end up including an unintended document, if there are more than one items in the binder with the name you typed in.
- In part to answer the latter limitation, applying a link to the placeholder is a more specific way of designating a binder item:

1. Type the `<$include>` placeholder into the document where you wish to have the mirrored or cloned text printed.
  2. Select the placeholder in its entirety and use the document link feature to point it at the item you wish to have imported into this spot.
- The third possibility is to supply a file system path into the placeholder, which will insert material from plain-text (TXT) or rich text (RTF) files on your disk. This is a very simple process that will not insert images, footnotes or comments.
    - Paths can be absolute, meaning the full system path to the file is supplied:  
`<$include:/Users/account/Documents/filename.rtf>`
    - Paths can also be made relative to the project's location on the disk. This example would refer to a file in the same folder as the project:  
`<$include:filename.rtf>`
    - If you are working cross-platform, and wish to compile from both PC and Mac, consider using Replacements to convert your path structure according to which system you are using.

## How Included Text Formatting Works

Since included text can represent formatted information, styles and formatting will be determined based on usage:

- The included text will always use its character styling—even if that means “no style”.
- Included text brings along its paragraph styling if the placeholder is on a line of its own. A block quote will remain a block quote when inserted.
- The paragraph style will be omitted if the included text is inline within another paragraph. It will however still bring in its own character formatting or styles.
- Naturally, text coming in from .TXT files will use whatever formatting context they are inserted into.
- The Section Type of the source document will be ignored. The inserted text will be treated according to the type of document it is inserted into.
- An exception to the above is when placeholders are used from the compile Format settings. In this case the original document's formatting will be used, including any compile settings that may be applicable to the original item's Section Type.

## 10.1.6 External Links

### Looking to link to external resources from Scrivener?

This section pertains to creating links to items in your projects that can be taken externally to other projects or programs—not linking to external sources *from* Scrivener. For general hyperlinks to the Web or other software, refer to [subsection 15.7.3](#).

It is not only possible to link to and from individual items within a project, but between projects as well. With external links you can easily refer back to individual components of your project from outside of it. Indeed, these links can be used in any software that has a concept of linking.

This capability is accomplished via the use of a special type of URL, much like a link to the Web, only designed to work locally on your machine. These links will instruct Scrivener to launch, open the target project and then display the requested resource in the editor. If Scrivener or the project is already open, then clicking the link will have a much more immediate effect.

### Linking Items Between Projects

There are two different approaches (both very similar to creating internal links *within* a project) to creating a link to an item from another project:

— As bookmark:

1. Open the inspector in the project you link in, and click on the bookmark icon (second from the left) to load the bookmarks tab ([section 13.4](#)).
2. Select Document or Project Bookmarks (use the latter for a global link), and then drag and drop the item from the other project into the bookmark list.
3. Alternatively, use the **Edit ▶ Copy Special ▶ Copy Document as External Link** menu command, and then paste into the bookmark list with **⌘V**. This method will be more useful if you need to link to the item several times from different projects or bookmark lists.

— As a hyperlink in the text:

1. Drag the item from one project into another project's text editor area (this includes notes and bookmark previews in the inspector).
2. Alternatively, use the special copy command mentioned above to paste into the editor. When pasting, only the URL can be pasted; if you prefer to see a title link, use the drag and drop method instead. You can also paste this form of link into the **Edit ▶ Add Link...** panel.

## Linking From Other Programs

- To copy an external link, select the item you wish to link to and use the **Edit ▶ Copy Special ▶ Copy Document as External Link**. This plain-text URL can be pasted into link fields, text editors and so forth.
- Alternatively, right-click on the item directly in the binder, and select “Copy Document Link” from the contextual menu.

## Advanced External URL Options

Those familiar with editing URLs may notice that the scheme uses the familiar key and value attribute system. The basic URL produced by the following commands specifies an ‘id’ with the UUID for the selected item. Most people will be perfectly happy with the above tools for creating links automatically, but if you would like to exert a little more control over how the links works, such as loading multiple items at once, or using splits, then read on.

The link is comprised of the following elements:

```
x-scrivener-item:///path/to/project.scriv?id=UUID&key=value
```

- The first part, `x-scrivener-item://` is the “protocol”, or what is used to route the link request to Scrivener on your system.
- Next is a hard-coded path to your project. Links cannot survive projects being renamed or moved, without the path being edited in the URL. So bear in mind that if you intend to link to a particular project heavily, you might want to be very sure of its name and location, first.
- The question mark separates the basic request from optional attributes. Most links will have an “id=UUID” key value pair, which loads an item into the editor. If a link lacks this pair, the action will simply be to load the project.
- The provided table lists optional attributes that you can add to the URL to cause Scrivener to behave differently when loading the item ([Table 10.1](#)). These should be added to the URL, separated with the ampersand symbol, such as `&view=qr`, which will cause Scrivener to load the indicated item in a Quick Reference panel, rather than using the editor.

[Return to chapter](#) ↗

## 10.2 Using Collections

Collections are a way to further organise the content in your binder using lists, which can pull from anywhere in the project and be displayed in any order you



**Table 10.1** External URL Options

Key	Values	Description
id	Valid UUID	The UUID of a specific binder item within the project. This comes supplied with the URL when using the <b>Edit ▶ Copy Special ▶ Copy Document as External Link</b> menu command, and in most cases that will be the practical way to get that information.
doc	Binder title	Instead of referring to the internal ID you can refer to the binder title of an item. The first item in the binder matching that name will be selected. As this is a URL, all rules pertaining to encoding URLs properly should be followed, including spaces (%20).
idr, doci	Valid UUID <i>or</i> Binder title	Instructs the project to load additional binder items (using any rules provided with the view settings, below, or using Quick Reference panels by default). Any amount can be supplied, such as idr, id2, id3...
view		Select from <i>one</i> of the provided values below, for example: view=qr.
	qr	Open the document in a Quick Reference panel instead of the main project window. When multiple items are indicated, they will all be loaded into their own panel.
	copyholder, ch	Open the document in the currently active editor's Copyholder, creating one if necessary.
	split	Use the active split without disturbing the layout, loading the first document into the active split and the second into the other split.
	split-h	Split the editor horizontally if necessary and load the documents into each split.
	split-v	As above, but with a vertical split.

please. These lists can even be automatically gathered for you using search criteria you save into them. If you'd like to have a concise list of every document flagged with the status of "Needs Rewrite", or if you want to focus on the flow of text within a chapter and play with the structure without changing the original, never mind endless other possibilities, this is the feature you're looking for.

You can think of the entries in the list of a collections as being a bit like a list of aliases to the original items. Changes made in the editor to items within the collection will also be made to the originals in the binder, and thus it is better to think of them as being the same item, only being shown in two or more places at once. A single item can be in no collection, one or in many—and in all cases, each instance will point back to the same original item in the binder. If that sounds confusing, think of how Project Search works ([section 11.1](#)), where a list of items is created in the sidebar for you, matching your search terms—you wouldn't think of the search results as being separate items. (In fact, search results have a lot in common with collections, as you'll soon see.)

Here are some example uses for collections:

- Experiment with an alternate scene flow without disrupting the original layout.
- Collect all scenes that still need editing.
- Designate items that you wish to share with another author using one of the various syncing methods.
- Search for any occurrence of words you tend to overuse. Saving a search that looks for "any word" amongst the listed words and clicking on this tab would highlight all of the problem words in the text editor, listing only those sections of the binder that contain them.
- Create a special compile group with an alternate selection and export order so you can compile only select portions of your draft folder.
- Store saved searches for future use, or to monitor workflows.

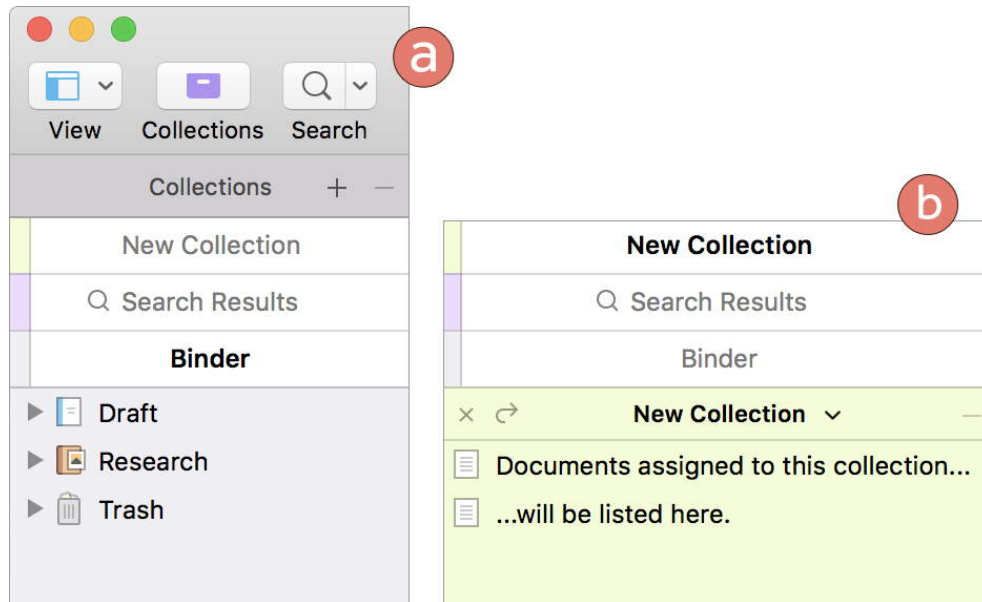
There are two types of collections that you can create and save, and a third "type" that is simply the built-in "Search Results" list:

1. *Standard Collections*: allows you to freely add, shuffle and remove items as you work. This is the most flexible and freeform type of collection ([subsection 10.2.2](#)).
2. *Saved Search Collections*: indicated with a magnifying glass icon beside their name, these collections will be dynamically populated by a list of items that match a stored search query every time you view the tab ([subsection 10.2.4](#)).

3. *Search Results*: a special built-in collection that cannot be removed. Any project searches will have their query and results stored in this collection automatically for future referencing.

### 10.2.1 The Collection Tab List

To reveal the collection interface, click the View icon in the toolbar and use the Show Collections command, or use the **View ▶ Show Collections** menu command.



**Figure 10.3** The collection tab list with (a) the binder selected and (b) a collection.

Each entry in the tab list represents a single collection. In the figure (Figure 10.3), the “Binder” tab is selected on the side marked (a). While not a true collection, this is one way you can navigate back to the main binder. On the inset marked (b) we have the “New Collection” tab selected. Also take note of the added optional toolbar button to the right of the View button that you can add. This button will toggle the collection list with a single click.

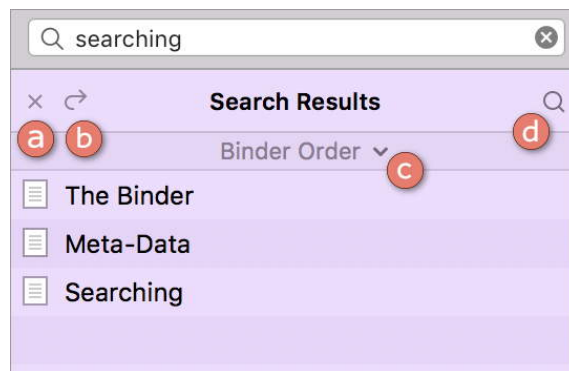
Usage of the tab list to switch between and manage your collections is as follows:

- Click on any tab to select it; when a tab is selected, it will set the background colour of the binder background and the name of the collection in the tab list will be printed in bold and black text.

Additionally, a header bar (using the collection colour) will appear between the tab list and the content area of the sidebar, printing the name of the active tab and providing a few utility buttons (we’ll go over those in the following section).

- You could hide the collections interface at this point and continue working in that tab. The background colour of the sidebar and the header bar will help remind you that you are not in the full Binder.
- To rename a collection: double-click on its name in the collection tab list, revise the text and press **Return** to confirm the changes. You can also rename a collection from the editor header bar, when viewing its contents in the main editor window.<sup>6</sup>
- When first created, a collection will be assigned with an automatically generated colour, but you can pick your own by clicking the downward facing chevron button, which can be seen in [Figure 10.3](#) to the right of the label “New Collection”.
- To change the order of any tabs in the list, drag and drop them up or down in the list. This will also impact their order in various menus throughout Scrivener, such as **Navigate ▸ Collections**.

## The Collection Header Bar



**Figure 10.4** Search results header: (a) close and return to binder, (b) load results in editor and (c) sort results.

The header bar which appears between the tab list interface and the main content area (or simply at the very top when the list is closed) contains a number of useful functions ([Figure 10.4](#)). In the figure, we’re viewing the built-in “Search Results” list.

- The **×** button will dismiss the current collection view and return you to the main binder.
- Click the **↶** button to load the contents of the collection sidebar into the editor area on the right (the targeted editor will be used when the inter-

<sup>6</sup> The dedicated “Binder” and “Search Results” tabs cannot be renamed.

face is split). This will treat the collection in a similar fashion as viewing a folder.

- c) Search collections, such as the “Search Results” list depicted in the figure, can also be sorted ([section 10.2.4](#)). Sort order can also be adjusted with the Touch Bar.
- d) The magnifying glass icon on the right side doubles as a status indicator, letting you know that the contents of the list below are being dynamically generated from a search result, and is also a button that when clicked, will reveal the search criteria used to assemble the list, in the Project Search interface ([section 11.1](#)).

Lastly, collections you create can have their colour modified by clicking a chevron icon that will appear directly to the right of the name in the header area (it can be seen in the inset marked (b) in the prior figure ([Figure 10.3](#)). The search results and binder tabs use a unified colour across all projects, and can be adjusted in the Colors tab of the Appearance: Binder settings pane ([subsection B.5.2](#)).

### Disappearing Collection Tabs

On account of how scrollbars are hidden by default on a Mac, unless scrolling, it may not be obvious that the Collection tab interface can be scrolled, causing tabs to mysteriously disappear. If you do not like this behaviour, you can change your Mac’s system settings in the System Settings: Appearance pane to always show scrollbars.

## Viewing the Contents of a Collection in the Editor

The contents of a collection are not solely a feature of the sidebar. If you would like to make full use of the capabilities afforded by the main editor’s group view modes:

1. While viewing a collection in the sidebar, click the ⇨ button in the collection header bar.
2. Direct navigation to collections is possible from the header bar contextual menu ([section 8.1.1](#)), under “Go To Collection”. No sidebar necessary!
3. This submenu is also available from the **Navigate ▶ Go To ▶ Collections ▶** submenu.

Once loaded into an editor, the collection will function similarly to viewing a folder in the editor. It will remember settings you apply to it, such as whether you used label view or freeform corkboard (the position of the cards will be saved into that collection), if a view mode has been locked to it and so forth. When you

navigate away to something else, you can return to it with the history feature as well.

### Why do the Editor and Sidebar Contents Mismatch?

In the case of lists that were the result of a search, the contents of the list imported into the editor will match the latest search results, and thus may differ from what you see in the sidebar if it has been open for a while. The list in the editor will refresh whenever it is viewed (including when moving past it via the history feature). The sidebar can be refreshed by switching from one tab to another, or by pressing **Return** in the search field at the top of the binder sidebar.

If you would prefer to view only a portion of the collection in the main editor you can simply select those items from within the list in the same way you might do so in the binder, forming a multiple selection ([section 6.4](#)).

## 10.2.2 Standard Collections

Standard collections are just the ticket for storing ad hoc lists of items. You have full control over what is listed within them as well as the order in which they appear. There are a few ways to create a new collection:

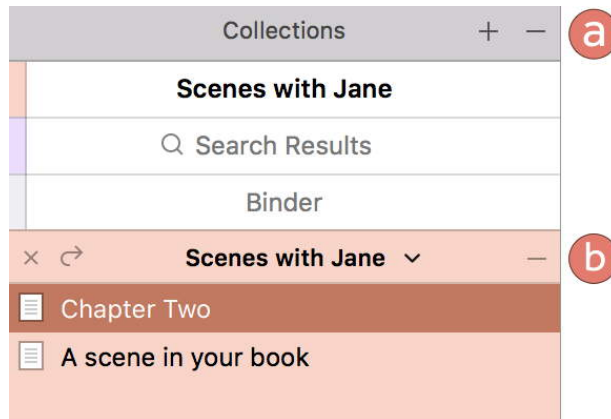
1. Click the **+** button in the tab list header, marked (a) in [Figure 10.5](#). Any items that you have selected in the active view (including the binder, search results, or even other collections), will be automatically added to it. It is perfectly fine to create an empty collection from no selection, too.
2. You can also create a new collection at any time by using the **Documents ▶ Add to Collection ▶ New Collection** menu command. As above, any selected items in the current view (or the current text document you are editing) will be added to the new collection. The tab list will open, and your cursor will be placed in the collection's label area so that it can be named.

Once a collection has been created, you can add or remove items to it, so it is not critical to select everything you need before you create it.

### Adding To and Managing a Collection List

There are several methods for adding items to an existing collection:

- With the tab list revealed, drag selection of icons from anywhere icons can be dragged from, and drop them on the desired collection tab. They will be added to the bottom of the collection list.



**Figure 10.5** The standard collection interface.

If you hold over the target tab for a moment, Scrivener will switch to the tab allowing you to drop the items precisely where you want to place them in the list.

- In variation to the above, if you hold down the **Option** key while dragging a container to a collection tab, it and all of its descendent items will be added.
- Use the **Documents ▸ Add to Collection** submenu. This works on selected items in the binder, corkboard or outliner, as well as from the text editor.
- In the binder sidebar, even from other collections, you can right-click on item(s) to access the “Add to Collection” menu.

In all cases, if an item already exists in the collection it will not be added again, and its original position will not be changed, so it is safe to err on the side of “over-selection”.

Items can be reordered within the list using click and drag, or the same movement key combinations used in the binder (**⌘↑** for up, and **⌘↓** for down). Since there is no hierarchy in a Collection, you will not be able to nest items.

### New items created in a collection

Within a standard collection, you may create new items using all of the ordinary methods available for doing so. Since collections are uncoupled from the binder structure in every way, new items will be placed into a folder, created for you if necessary, with a name corresponding to the collection title they were created from. These folders will be created at the top level of the binder, right before the Trash folder. An example might be a new text file called “Joseph” in the “Characters” collection. When you return to the binder, you will find a new text file called “Joseph” in a folder named “Characters (Unsorted)”. You can freely move this new document wherever you’d like.



It's important to note that this is a one-way process. You cannot add new items to the collection by adding them to the folder in the binder.

## Removing Items from the List

Remove items by selecting them in the collection sidebar, and then clicking the **–** button in the lower header bar marked (b), or by simply pressing **Delete** on your keyboard.

### Trashing Items From a Collection

To not only remove an item from a collection but send it to the trash as well, then use the standard **⌘ Delete** shortcut.

## Deleting the Collection

To delete the entire collection:

1. Select the collection from the tab list that you wish to remove.
2. Click the **–** button in the upper title bar, marked (a).
3. You will need to confirm this action as there is no way to undo it.

## Cloning and Backing Up Collections

The easiest way to create a copy of one collection (including automatically generated ones, such as sync collections, or search results) is to create a new one with the full contents of the one you wish to copy:

1. Navigate to the collection you wish to clone with the **Navigate ▶ Collections ▶** submenu.
2. Select all of the items in the binder sidebar with **⌘ A**.
3. Either click the **+** button in the collections header bar, or use the **Documents ▶ Add to Collection ▶ New Collection** menu command.

You also can “back up” a standard collection by storing the list into another document's bookmark list. This can be useful if you have a lot of collections bulking up the list, and have a few that are seldom used. Here is an example of how this can be done:

1. Create a new document in the binder to store your collection list.
2. Open the inspector sidebar and click on the bookmark tab ([section 13.4](#)), or press **⌘⇧N** twice. If the list is not showing “Document Bookmarks” click the header bar to switch to them, or press **⌘ 6**.

3. Use **Navigate ▶ Lock in Place** (⌘L) to lock the editor so that you can freely work in the sidebar.
4. Use the **Navigate ▶ Collections ▶** submenu to load the collection you wish to save into the sidebar if necessary.
5. Select all of the items you wish to save and drag them into the document's bookmark list.

Later on, if you ever wish to restore this collection after having removed it by adding a new collection and then dragging and dropping the bookmark list into the collection sidebar.

### 10.2.3 The Special “Search Result” Collection

If you have used the project search feature ([section 11.1](#)) before, then you've been using a collection without perhaps realising it. Search results are placed into a special built-in collection every time you run a search, and the criteria of your search are saved into it along with the project. This means the last search that you ran will always be available to you, even between sessions.

Like the “Binder” tab in the collection tab list, the “Search Result” tab cannot be deleted or renamed, and there will always be one included with every new project, even if search has never been used.

Some aspects of its behaviour also apply to saved searches, discussed in the next section:

- When you click on the Search Results tab, the previous search criteria will be loaded into the search bar tool, allowing you to further tweak the results if you desire.
- Since search results are a direct product of search criteria, you cannot manually add, remove, or change the order of items from this collection, as you can with the standard type.

#### Upgrading from Scrivener 2

In previous versions of Scrivener you could display additional columns in search result style collection sidebars. This feature has been removed, as it is simple to open the list into one of the editors, where the full outliner can be used to display and sort by the kinds of metadata that were once here—never mind everything else the editor view can do.

### 10.2.4 Saved Search Result Collections

When you find yourself running the same few project searches over and over, it's probably a good time to learn how to save them for easy single-click recall in the future. To create a new saved search:

1. Start with an active search of any sort. If you are unsure of how to get a search started, refer to Project Search ([section 11.1](#)). All of the settings you select from the magnifying glass menu as well as what you type in will be saved into the collection's settings.<sup>7</sup>
2. With the project search field visible, click the magnifying glass icon to the left of where you would normally type in your search term, and choose the "Save Search as Collection..." command at the bottom of the option list.
3. You will be asked to give the saved search a name. Click the **OK** button to proceed.

If the search was set to **Search in** the "Label" scope, and the text you entered precisely matches a label name, the associated colour will be used for the tab's colour as a convenience.

Saved searches load as a static list when you first click on them. If desired, you can refresh the list by opening the Project Search field and pressing the **Return** key ([section 11.1.1](#)).

## Sorting the Results in the Sidebar

The contents of search lists can be sorted by clicking on the button marked (c) in [Figure 10.4](#). All search lists share the same sort settings. The following criteria are available:

- *Binder Order*: this is the default setting. No sorting will be done on the list, with each item listed in the order they appear within the binder from top to bottom.
- *Sort by Title*: the list will be sorted by the given names of items. If titles are changed while working in the list, it will keep itself sorted dynamically.
- *Sort by Date*: which in this case refers to the created date of the item.

Below these options you will find a toggle for switching between ascending and descending sort order.

### Need More?

If you require more settings, or wish to sort by another type of metadata entirely, then load the search result ([section 10.2.1](#)) into one of the editor splits and use the outliner tool to sort ([subsection 8.3.6](#)) or further filter the search results ([section 11.4](#)).

<sup>7</sup> There is one exception: searches performed using the "Binder Selection Only" option cannot be saved for future use, because the binder selection is a temporary state which changes whenever you click in the binder. If you find yourself unable to save a search, make sure this option is disabled.

## Updating the Saved Search Query

To refine or modify the search settings stored into a saved search collection:

1. You will need to start with an active search—loading the search collection tab is sufficient.
2. Open the project search field if it is not visible: click the search button in the toolbar, or use the **⇧⌘F** shortcut.
3. Modify the search settings with the magnifying glass menu. Your changes will be automatically saved into the collection.

When resetting all search parameters with the “Reset Search Options” command, or when changing the text you are searching for, your search will be moved to the Search Results tab, rather than directly modifying the collection.

To update a saved search collection with the current project search settings directly:

1. If necessary, open the collections tab list with **View ▶ Show Collections**.
2. Right-click on the saved search collection in the tab list, and select the “Update Saved Search to Use Current Search Settings” command.

All settings and text used in the current project search will replace the current saved search settings.

## Converting a Saved Search to a Standard Collection

Given their dynamic nature, the contents of a saved search list cannot be added to, removed from or reorganised (outside of sorting). If you wish to “freeze” a search list so that you can play with it freely, or simply to store it for later reference, there are two ways you can do so:

- Convert the saved search to a standard type: This will destroy the saved search, so only use this method if you no longer need the search criteria. To convert a saved search result to a standard collection, select the tab in the sidebar, and use the menu command, **Navigate ▶ Collections ▶ Convert to Standard Collection**.
- Copy the contents into a new collection: This is quite easy to do. Select all of the items (**⌘A**) in the search result list, and click the **+** button in the collection header bar to create a new Standard Collection from the current selection. The items will be listed in the new collection in the order they were sorted within the search list.

## Deleting Saved Search Collections

Saved search collections can be removed in the same fashion as standard collections, by selecting the tab and clicking the **–** button, marked (a) in [Figure 10.5](#).

Since clicking on a saved search collection automatically loads its search parameters into the project search tool, you can effectively undo this by switching the Search Results tab and recreating the collection from the magnifying glass menu.

## 10.2.5 Back to the Binder

You might wish to know the overall disposition of a collection list in the binder, or where a select few items in the list are located in the overall structure of the project. The **Navigate ▶ Reveal in Binder** menu command (**⌘R**) works from collections and search results. Since this command can be used on many items at once, it makes for a handy way to see what *isn't* in large collections, too.

It is possible to select some or all of the items in a collection and instruct Scrivener to gather them all together into one spot, based on the order of their appearance in the collection. There are several ways of doing so:

- *Drag & drop*: you will need to have the collection tab interface visible. Select the files you wish to gather, drag them to the binder tab and hold for a moment. The binder will activate, and you can drop the selection wherever you please.

If the **Option-dragging creates duplicates** setting is enabled in the Behaviors: Dragging & Dropping settings pane, holding down the **Option** key will work here to duplicate the dragged items instead of moving them.

- **Documents ▶ Move To ▶** submenu: select the items you wish to gather together, and either use the main application menu or the contextual menu to move them to a selected item or container. This action will operate in the background, leaving your focus in the collection.

Likewise, **Documents ▶ Copy To ▶** can be used if you would prefer to duplicate the items rather than move them.

- When you want to gather the selection into a new folder, after having used **Navigate ▶ Reveal in Binder**, follow-up with the **Documents ▶ New Folder from Selection** menu command.

Experienced users of outliner style programs may recognise this ability as “mark and gather”. The marking phase is done by assigning documents to a collection. Moving them back out to the binder then gathers them quickly into one focused spot. This can be an extremely useful technique for some workflows.

This technique can also be useful for implementing an experimental text flow. If a chapter or section just doesn't read well, you can quickly create a new collection with the contents of that section as files and then reorganise the flow using the collection's ability to view itself as a corkboard or outliner—and of course reading the text with Scrivenings mode. Once you are satisfied with the new layout, select the contents of the collection and drag them back into the original folder in the binder using the above method. The items will be re-organised for you back into that folder and become the new book structure.

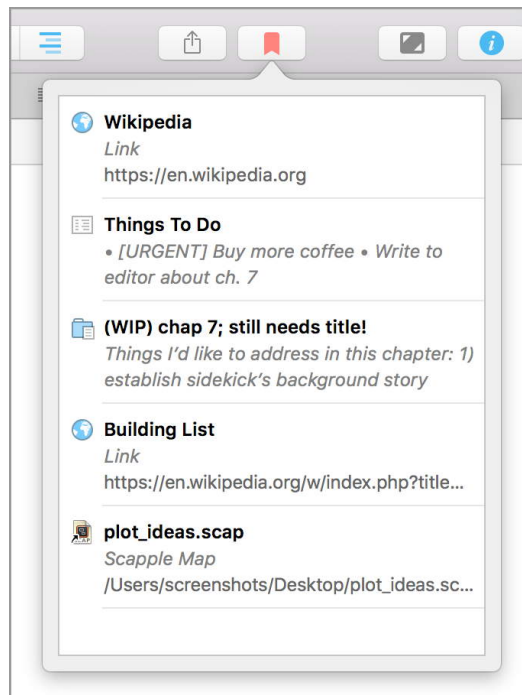
[Return to chapter](#) ↗

## 10.3 Project and Document Bookmarks

No doubt you've encountered the concept of bookmarking web sites in your browser. We could say that at its most basic level, bookmarking binder items is similar to this concept in that you can create and organise lists of important or frequently used items, making them easier access and keep in mind. As with browser bookmarks, they can be used to refer to files on your disk or resources on the 'net, but Scrivener's bookmark feature goes further.

### Upgrading from Scrivener 2

If you're searching this manual for "Favorites", "Project Notes", "Project References" or "Document References", you might want to head on over to the article addressing what has become of these features in the What's New section ([section F.4](#)). The section you are reading now addresses a new feature which combines all of the above into one single cohesive system.



**Figure 10.6** Bookmarks are readily accessible via a single click from this toolbar button.

In this section we'll go over how bookmarks can be used as a universally available scratchpad, either used in a separate window or embedded into the inspector sidebar on the right hand side of the main project window. They can also be

used to boost your efficiency when using those types of menus that work with or target binder items, such as the **Navigate ▶ Go To ▶** submenu, by placing bookmarked items at the top of the list.

In addition to each project's global bookmark list, every *item* in the binder can also store its own list of bookmarks (available exclusively through the inspector). This way you can “scope” your bookmarks, having some globally available throughout the project, while each document's bookmark list will only be displayed when editing that document. The latter will be additionally useful in cross-referencing binder items together.

We'll go into the specifics of adding, removing and managing bookmarks after covering the different areas bookmarks are used within. If you are brand new to the concept and want to have a little to play with while reading through the introduction here, do the following:

1. Click on the Bookmarks toolbar icon ([Figure 10.6](#)).
2. As instructed within the blank area of this panel, simply drag and drop anything from your binder into the panel.

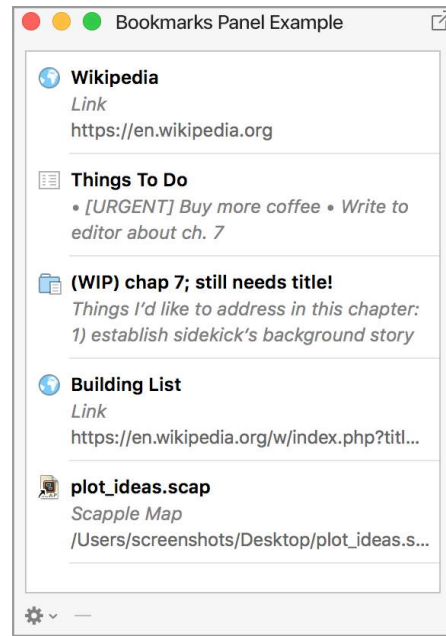
You've now got bookmarks (well, one of them anyway). With something start with, let's take a look at the various areas of the interface these bookmarks can work within.

### 10.3.1 The Bookmark List and Floating Panel

The list that pops up when you click the bookmark icon is simple ([Figure 10.7](#)), but provides for more flexibility than you might think at first glance:

- Click on a bookmark to load a binder item in the active editor.
- Double-click to load the bookmark into a Quick Reference panel. You will also need to double-click to confirm loading if the bookmark is to an external resource, such as a web page or file on your disk.
- Hold down the **Option** key when clicking to load the bookmark in the inactive editor split, opening one if necessary to do so.
- Bookmarked folders will have a small arrow icon to the right of the folder name in the list. Click on this button to reveal the contents of that folder in a menu, and select from it to navigate the editor to the chosen subdocument. The **Option** key method described above works here as well.
- Right-click to access extensive contextual menu options. These are the same as those offered when right-clicking on bookmarks in the inspector. Refer to the full documentation on the inspector's bookmark list in [Opening and Using Bookmarks \(subsection 13.4.2\)](#).





**Figure 10.7** The floating bookmark list can be converted to a browser.

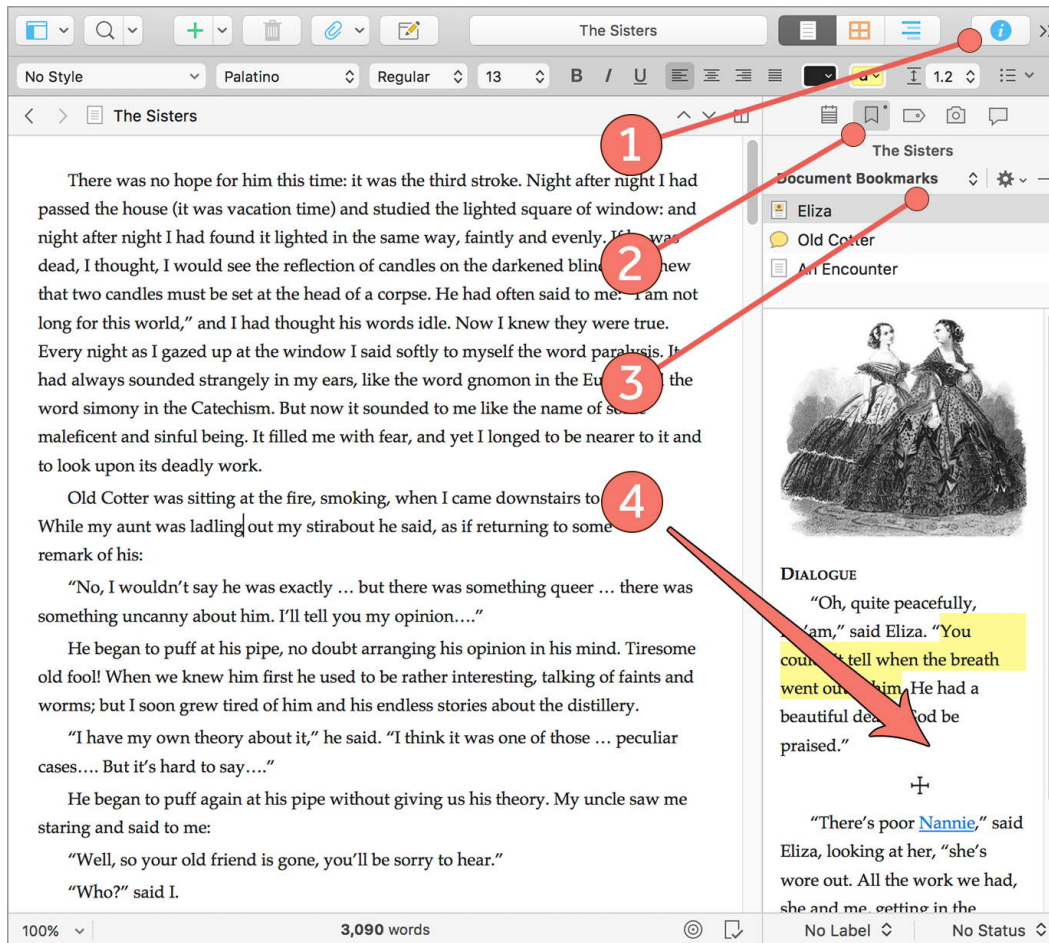
While clicking on a button in the toolbar can be handy, there may be times where you want the list to hang around a bit more permanently. The easiest way to do so will be to grab any edge of the toolbar list with your mouse and drag away—the panel will “tear off” of the toolbar and become a floating window at that point. Alternatively use the **Project ▸ Show Project Bookmarks** menu command (⇧⌘B) to bring up the panel directly. In addition to all of the capabilities listed above, the floating panel also provides a few additional functions:

- The ☹ button in the lower left makes it easy to add a link if you don’t have the original in front of you handy for drag and drop.
- The — button is used to delete selected bookmarks.
- In the upper right-hand corner is a button that converts this floating panel into a Quick Reference window, which serves as a bookmark browser.

### 10.3.2 The Inspector’s Bookmarks Tab

The inspector tab itself is fully documented in the chapter on the inspector ([section 13.4](#)), but given the integrated role this tab plays with the rest of the project window, we’ll cover a few concepts here as well. If you are unfamiliar with the inspector in general, see [Figure 10.8](#) for a quick overview on how to load bookmarks into the right sidebar of the project window.

The inspector, as a tool that is embedded directly into the project window as a sidebar, is ideal for playing host to your bookmarks. It can be useful having what amounts to a global notepad in the sidebar, at your fingertips no matter

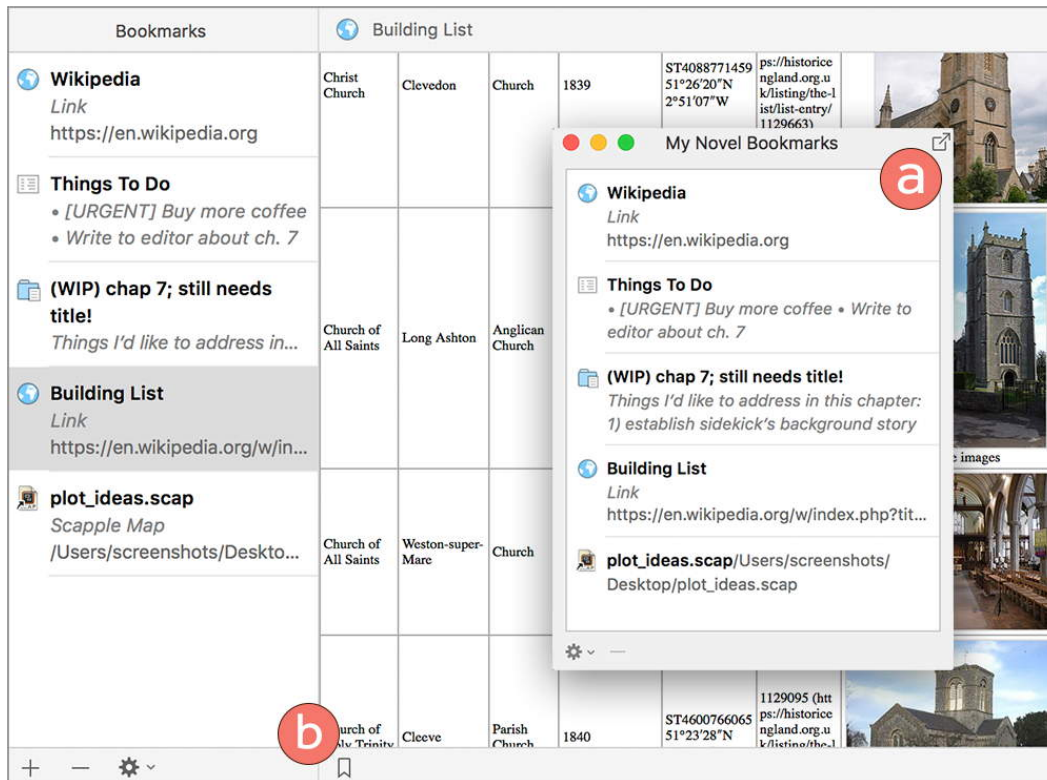


**Figure 10.8** View bookmarks in the inspector by (1) revealing the inspector, (2) switching to the bookmarks tab, (3) selection between project or document bookmarks and (4) using the preview area to work with the content of the bookmark, selected in the list above.

what part of the project you are working on. Project bookmarks provide this capability, by promoting any binder item at all to this global list.

This concept is also applied to cross-referencing between sections of your work and research, by viewing and editing Document Bookmarks right in the same area of the inspector.

As in older versions of Scrivener (with the similar “References” feature), whenever you link to, or bookmark, an item from another a back-link bookmark will be created, letting you know which items have linked to something simply by looking at its document bookmark list.



**Figure 10.9** The bookmark list can be expanded into a Quick Reference panel for quick access to your notes and research.

### 10.3.3 Working with Bookmarks in a Quick Reference Panel

There are three ways to browse bookmarks in a separate window, two of which are demonstrated in [Figure 10.9](#):

1. Click the button in the upper right-hand corner of a floating bookmark pane, marked (a), to convert it into a Quick Reference window with a bookmark sidebar. The same command and shortcut that brings up the floating bookmark list will, if the list is the active window, convert it to a Quick Reference window.
2. Any existing Quick Reference panel can browse project bookmarks by clicking the bookmark button in the lower left-hand corner, marked (b). You can also use the same **Project ▶ Show Project Bookmarks** command, and **⌘B** keyboard shortcut, to toggle this sidebar on and off when the active window is a Quick Ref panel.
3. If you want to get straight to this type of window without going through other windows or panels first, hold down the **Option** key while using the Project menu, and select the “Show Project Bookmarks as Quick Reference” menu command that will appear. This can also be done from the

keyboard, with the `⌘⌥⌘B` shortcut.

The main difference with the bookmark list in a Quick Ref panel versus its floating form is that it will acquire a `+` button in its footer bar. This is a unique capability to this form of working with bookmarks. Instead of creating a bookmark from an existing source you will be creating a brand new document in the binder.

In most cases you will be asked where you would like to save the new file in the binder. After you choose a location and click the **OK** button, the new note will be created into the sidebar and you can begin typing in a name for it. Click into the editor area of the Quick Reference panel, or press the Return key to start jotting down your notes.

You can switch between sidebar and editor focus with the `⌘Tab` keyboard shortcut.

### Default New Bookmarks Folder

When creating a new bookmark note from the sidebar you will be asked where you would like to save it. This part of the process can be bypassed by clicking the **Do not ask again** checkbox below the group selection tool. From that point on, new notes created in the sidebar will automatically be filed into this folder for you.<sup>8</sup>

If you change your mind about using a centralised folder in the future, you can modify it in **Project ▶ Project Settings...**, under the Special Folders pane (section C.7). Select the “Ask Every Time” option at the top of the **Default New Bookmarks Folder** dropdown to disable auto-filing.

## 10.3.4 Bookmarks in Binder Item Menus

Adding items as project bookmarks will elevate their presence in some menus that allow you to select binder items from a submenu hierarchy:

- **Edit ▶ Link to Document**: for creating hyperlinks to documents. This menu is also available when right-clicking on text in the editor.
- **Navigate ▶ Go To**: navigate the active editor to any spot in the binder. This menu also appears in the editor header bar icon menu and the composition mode control strip along the bottom of the screen.
- **Navigate ▶ Quick Reference**: opens a Quick Reference panel for the selected item.

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<sup>8</sup> If you have a strong preference as to how future projects should have this aspect set up, consider saving your settings into a project template (subsection 5.4.3).

### 10.3.5 Managing Bookmarks


With the main areas that bookmarks are worked with now covered, the following serves as a reference for performing basic management tasks.

#### Adding Bookmarks

There are several ways to add a project bookmark:

- Click on the bookmark button in the main application toolbar ([Figure 10.6](#)), or use the B shortcut to bring up the list in a floating panel. Drag and drop the resource you wish to bookmark into the list.
- When using the floating form of the bookmark panel, you can also click on the  button to add new bookmarks. This button is functionally identical to the button featured in the inspector ([subsection 13.4.1](#)). It also appears in the Quick Reference bookmark sidebar.
- While editing a document in the text editor (or the section you are working on within a larger Scrivenings session), bookmark it with the **Documents ▸ Add to Project Bookmarks** menu command. You can also use this command on any selected amount of items in the binder sidebar, corkboard or outliner views. This command is also available from the binder in the right-click contextual menu.
- If you own a keyboard with a Touch Bar you can add a project bookmark toggle button to the text editing context.
- Use the Paste command (V) if you have a URI of any type on the clipboard. This includes URLs to the web, file links and scheme links—including external links copied from other Scrivener projects (you can also drag directly from the other project's binder as well).

To create document bookmarks you must first open the inspector to the bookmarks pane, as illustrated in [Figure 10.8](#), then:

- Copy and paste, as described above.
- Drag and drop the resource into the document bookmark list. This includes binder items or their icons, from wherever they can be dragged, as well as from hyperlinks and internal links from text editing views.
- Click the  button in the upper-right corner of the inspector listing and use the “Add Internal Bookmark” submenu to select an item from the full binder listing.

For external resources, the software will attempt to generate a title for the bookmark, depending on the type of link it is. If it is a plain-text URL you might



get a generic title such as “Link”, but files will use the file name for the title, and hyperlinks will try to use website titles, or the link title automatically.

Internal bookmarks are always linked directly to the name and icon of the binder item they refer to.

## Removing Bookmarks

Select the bookmark(s) you wish to delete and use one of:

- Use the same **⌘ Delete** shortcut you would use to trash an item from the binder sidebar.
- Right-click on the selection and use the “Delete Selected Bookmark” contextual menu command.
- Inverse to the menu command to bookmark one or many files, the **Documents ▶ Remove from Project Bookmarks** command is available for the active editor, binder sidebar, corkboard and outliner views. This command is also available in the binder as a right-click contextual menu command.
- With the Touch Bar, removing an item from the bookmark list is a toggle, and tapping it again will remove the bookmark status.

## Editing Bookmark Titles

Bookmarks can have their name changed by right-clicking on the bookmark and selecting the “Edit Bookmark” option, or by using the **Esc** key. If you own a keyboard with a Touch Bar, you will find a pencil icon when your keyboard focus is in a bookmark list. Tap this to edit bookmarks. Within the Quick Reference bookmarks sidebar you can double-click on bookmarks to edit their titles or rename the items they link to.

There are additional tools for managing bookmarks that are exclusively available from the inspector ([section 13.4.2](#)), such as updating its URL.

### **Renaming Internal Bookmarks is Renaming Items**

Be aware that if you rename an internal bookmark (one that is a link to another item in the same project binder) you will be renaming the *original item*. This is in fact less like a “bookmark” in the traditional sense of the word, and more a second place to access and modify that original item.

## Organising Bookmarks

Bookmarks are listed in the order they were created, but you can adjust their organisation to suit your uses of them. In the case of project bookmarks, the order will impact every context where they are displayed. It may be a productivity boost to keep frequently used items near the top of the list, where they will

be more easily accessed from tools like **Navigate ▸ Go To ▸** submenu, which only displays the top five bookmarks.

- Click and drag to reorder bookmarks among themselves. This works from within any of the editable bookmark lists in the software, including the toolbar popup.
- Bookmarks can be sorted alphabetically from within the list. With the keyboard focus in the list, use the **Edit ▸ Sort ▸ Sort Ascending** or **Descending** menu commands. This is a one-off command; you will need to reuse it if you wish to sort bookmarks again.

## Copying Links and URLs

Sometimes you just want a link from the bookmark, rather than doing anything with it immediately. Perhaps you want to store it in another program or load a URL into a browser that isn't your default.

1. To copy a hyperlink, suitable for pasting into documents as a clickable link with a friendly title, you can use the **⌘C** shortcut on any selected bookmark:
  - File and URL links will use the bookmark name for the link title.
  - Document bookmarks will use the document name. When pasted back into a text editor in the same project they will become document links. If you paste them into another project or into any other external context they will become external links to that binder item. I.e. clicking on the link in a word processing file in LibreOffice would open the item in your project directly.
2. To copy just the URL as a plain-text address, right-click on the bookmark in any context and use the “Copy URL” contextual menu command.

If you're looking for ways to copy the bookmark itself—perhaps to move a document bookmark to a project bookmark, or duplicate a list of bookmarks to another document, the inspector tab will be the best place for doing so ([section 10.3.5](#)).

## Copying Bookmarks Between Items

Bookmarks of all types can be freely copied and pasted between lists, both project and document alike. They can also be dragged from one list to another—a possibility between Document Bookmarks when Quick Reference panels ([section 12.6](#)) are in play.

Collection lists ([section 10.2](#)) and internal bookmarks are very similar to one another. You can almost think of bookmarks as being private collection list that



each item in the binder has available for use. You can freely drag and drop items between bookmark and collection lists.

## Sharing Bookmarks Between Projects

If you drag items from the binder of one project, into the bookmark tab of another (either project or document bookmarks are a valid target), this will store a special external direct link to the individual items you dropped. Double-clicking this bookmark will load the project if necessary and open the item you linked to within it. Read more about cross-project item links in External Links ([subsection 10.1.6](#)).

External bookmarks can be copied and pasted from one project's bookmark tab to another, and in most cases this will be the preferable way to doing so, as dragging bookmarks between projects will cause a loss of their titling information.

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## 10.4 Organising with Metadata

Documents of all kinds can have various metadata associated with them. Metadata is a way of talking about something without changing it directly. A simple example from the analogue world could be a Post-It note on a paper-clipped stack of paper. The Post-It note is a kind of metadata, as is the paper-clip. Just as with these paper-world tools, digital metadata can help us more easily search for tagged items, either visually while browsing, or through tools such as project search ([section 11.1](#)).

Let's go over each of the types of metadata that Scrivener provides to items, the basics of how they can be set up, assigned, and how they will in general be displayed within the software. The main interface for viewing and editing all of the metadata for a given document is the inspector; here we will focus on the bigger picture, so you should refer to that section for the details on using that pane ([chapter 13](#)).

### 10.4.1 The Title of an Item

The most important piece of metadata any item has is so fundamental you might not even instinctively think of it as being metadata: its Title. The title will be used to identify the document in the many views, menus, as well as exporting items as files and oftentimes as headings in a compiled document.

Refer to Titles and Adaptive Naming ([section 7.2](#)) for further information on using titles.

## 10.4.2 The Synopsis of an Item

The Synopsis is a plain-text field, primarily intended to be a short summation of the contents of the document, though how you choose to use it is entirely up to you. The synopsis is displayed in three prominent areas:

1. Corkboard: used to display the content area of the card.
2. Outliner: will be placed beneath the title by default.
3. Inspector: if you need to reference an item's synopsis without finding it in a list somewhere, the inspector sidebar's Notes tab, or the special Synopsis split in a Quick Reference panel will be the best approach.

Instead of the text synopsis, you can elect to use an image to represent a document on the corkboard. This image will be used on the corkboard and in the inspector, but whatever text exists in the standard synopsis field will be used in the outliner, as described above, and in the various export and print options that include a synopsis field.

## 10.4.3 Labels & Status

The next two forms of metadata are flexible in how you can refer to them within a project. You can give these fields custom names and the interface and menu commands will adjust accordingly. If you wanted, you could have “POV” and “Location” instead of label and status, or “Focus” and “Type”, or “Monkeys” and “Bananas” for that matter. The documentation will of course continue to refer to them as labels and status for the sake of simplicity.

All new projects come with a few generic labels and status, but you will most likely wish to add your own or change them completely. Use the **Project ▶ Project Settings...** menu command to access panes via Label List & Status List ([section C.3](#)).

After the title itself, they are the most visible form of metadata. They can be represented in the corkboard and outliner views, are always present along the bottom of the inspector and Quick Reference panels and are given priority placement in most printing methods.

As with all metadata, one of the primary purposes of using them is to make our searches more powerful and specific. In addition to regular project searches by label or status, you can also use these types to filter outliner & corkboard views ([section II.4](#)).

### Label Colours

Since label colours can be used to accent various areas of the project window, you can choose colours that reflect how prominent you wish them to be. For example, richer more vibrant colours can be used among pastel choices to indicate tension, or priority.

Label colour can be expressed in the following ways:

- On the corkboard, index cards will bear a strip along the left edge of the card indicating label assignment. Use **View ▶ Corkboard Options ▶ Show Label Color Along Edges (^⌘P)** to toggle their visibility.
- There is an entire corkboard mode dedicated to working with labels. Read more about that in *Arrange by Label* ([subsection 8.2.5](#)).
- The outliner has the label column added as a default to all new projects.
- As previously mentioned, the **View ▶ Use Label Color In ▶** submenu contains a number of options for tinting various areas of the project window or elements within it with the label colour:
  - *Binder*: A dot will be placed to the right of an item in the binder, signifying its label setting. If you prefer the binder row be highlighted, use the “Show as Background Color in Binder” option, below.
  - *Icons*: Only the icons will be tinted throughout the project. Wherever the icon for an item appears (such as in the editor header bar, next to the title in corkboard, in search results, and so forth) it will be tinted using the colour of the assigned label.
  - *Index Cards*: The entire background “paper” for index cards will be tinted using the assigned label colour. This includes the index card that appears at the top of the inspector.
  - *Outliner Rows*: The background for the entire row will be filled in with the label colour.
  - *Scrivenings Titles*: When **View ▶ Text Editing ▶ Show Titles in Scrivenings** is enabled, the line of text used to print the title of a document in Scrivenings mode will be tinted using the label colour of the corresponding document, giving you a valuable look at your labels colours directly in the text editor.
- When printing outlines or corkboards ([chapter 26](#)), label colour can be added for effect (it will be enabled by default on index card printouts).

## Status Stamps

As with labels, the status field can have its representative name altered to suit your project’s unique requirements. By default, this field represents the status of a document in terms of its completion, such as “To do” or “Rough draft”, but this field can be used for whatever purpose you desire.

Unlike the label, there is no corresponding colour, and so its display potential is more limited:

- On the corkboard, they can be displayed as an optional “stamp” across the face of the card with the **View ▶ Corkboard Options ▶ Show Status Stamps** menu toggle (^⌘S).
- In the outliner, the status is one of the default columns that comes with every new project.
- An item’s Status setting will be used to help you identify untitled snapshots (subsection 15.8.1), such as “Untitled (First Draft)”.

### 10.4.4 Custom Metadata

For all of the things we couldn’t think of. With four different types of field and extensive support for searching and filtering, custom metadata picks up where the stock tools leave off. These can be used to create however many fields you need in a dedicated form built into the inspector pane, as sortable outliner columns or tools for filtering corkboard, outliner views and project searches:

- *Text*: a simple text field. This tool is great if you need to mark sections with a specific piece of information that is often different for each item in the outline, but has a common theme. Useful for bulk text with an optional word wrap, or short snippets of information. E.g. a non-fiction book on edible plants might use a text field to record the Latin name of the plant discussed in that outline item. This information is something you would probably want to print in the book as well (and you could, with placeholders used to insert metadata into the text, but that’s a more advanced topic!), but it might also be useful to you as an author to have a concise list of these names in the outliner as a dedicated column.
- *Checkbox*: the simple act of saying yes or no about a thing can yield a lot of flexibility in how you work. Create simple to-do lists, mark when blog articles have been published or track phases of a large editing project in conjunction with searches by checkbox state.
- *List*: if you find yourself wishing you can add another dropdown field like label or status provides, this is the tool to use. Using a similar approach as the status field, you can add list items, organise them and choose a default.
- *Date*: store date and time information with an easy to use calendar interface coupled with a natural language recognition system that lets you type in things like “monday” and have the computer figure out for you when the next Monday will be. Use this to store publication dates, timeline information, deadlines and so on.

Get started with setting up your own fields by using the **Project ▶ Project Settings...** command, in the Custom Metadata pane, and be sure to check out the following references for further documentation on the various places where these fields are set up and used.

**See Also...**

- Overview: how custom metadata ([subsection 10.4.4](#)) can benefit your work.
- Settings: adjusting the available fields and their settings, in project settings ([section C.4](#)).
- Inspector: editing custom metadata on a per-item basis with a form built into the inspector ([subsection 13.5.2](#)).
- You can use list and checkbox type fields to filter outliner & corkboard views ([section 11.4](#)).

### 10.4.5 Using Keywords

Each document can have a list of keywords associated with it (what you might be more familiar with as “tags” in some other programs). These are useful for making documents easily searchable—for instance, you can list all characters and locations connected with a scene, even if they are not mentioned explicitly in the text. Creative uses for keywords also include extended status control, editing milestones, plot management, and whatever else you can think of.

Their biggest advantage is in non-exclusive assignments. A document can only have one label, and thus be one type of thing at a time, but you can have as many keywords as you need assigned to one item, creating compound descriptions of items, and allowing for overlap with other items that may not be similar, but yet still share some common attribute.

Keywords can be displayed in the following fashions:

- On index cards in the corkboard, as coloured strips of “tape” along the right-hand side: use the **View ▶ Corkboard Options ▶ Show Keyword Colors** (^⌘K) menu toggle.
- As an outliner column, where they can be listed by name with **View ▶ Outliner Options ▶ Keywords**, and as the default sub-option as coloured squares, with **... ▶ as Color Chips**.
- As an editable list, in the Keywords pane of the metadata inspector tab ([subsection 13.5.3](#)).

As with labels, keywords each have an associated colour displayed beside the keyword in the inspector list, as an underscore in the relevant outliner column, and in the Project Keywords window (see below). Additionally, keywords can be used in the corkboard as small coloured tabs along the right-hand edge of the card. The visibility of these can be toggled with **View ▶ Corkboard Options ▶ Show Keyword Colors** (^⌘K).

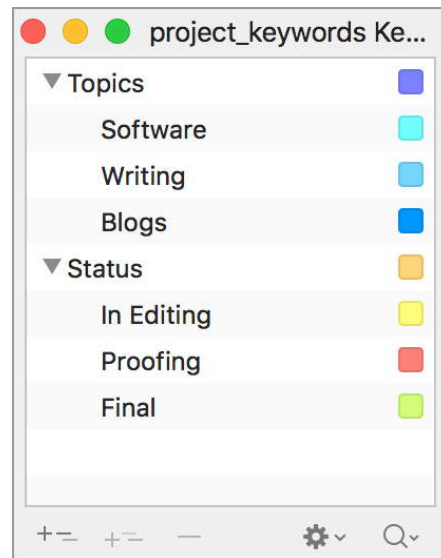
### Keywords are Case-Sensitive

When you assign keywords to documents from their inspector pane, they will automatically suggest any existing keywords from within the project. However you should be aware that keywords are case-sensitive, meaning that if you have a keyword called “Software” in the master list, but start typing in “sof” in the inspector, nothing will be suggested, and indeed adding it as “software” would create a new entry in the list.

### Project Keywords Panel

The Project Keywords panel holds all of the keywords in use by the project. As you assign keywords to items, using the Inspector’s Metadata tab ([subsection 13.5.3](#)), they will be added automatically to the central project list, making it a complete reference of all keywords in use within the project (you can also create keywords for future use here, without assigning them to anything yet). The panel is also how you will handle bulk management of keyword assignments for many items at once.

You can access this pane via **Project ▶ Show Project Keywords** (⇧⌘K) or by double-clicking any of the keywords in the Inspector pane.



**Figure 10.10** The Project Keywords panel shows all keywords in the project.

You can create or delete keywords by using the buttons at the bottom of the panel ([Figure 10.10](#)):

- The left-most button creates a new keyword as a sibling of the selected keyword. If we selected “Status” in the example and clicked this button the keyword would be on the same level as “Topics” and “Status”.

You can also create new sibling keywords with the **Return** key.

- The second button creates a new keyword as a child of the selection. With the same example but clicking this button, the keyword would be added along with “In Editing”, “Proofing” and “Final”.
- The third button deletes the selected keywords. If any of the keywords in the selection are assigned to items in the project you will be warned and asked to confirm the deletion.

### Organising Keywords

The Project Keywords panel is a freeform work space where you can organise your keywords into groups and arrange them sequentially, by topic or however you see fit.

- To change the order of keywords within the list, use drag and drop, or the keyboard shortcuts from the **Edit ▶ Move ▶** submenu.
- You can also drag any keyword onto any other keyword to nest keywords. In the example figure, we have nested “Software”, “Writing” and “Blogs” into a keyword called “Topics”. This relationship is merely for organisation within this panel. The “Blog” keyword will not print that it is a “Topic” in other areas of the software, and indeed the “Topics” entry is itself a keyword that can be individually assigned to items.

#### Prefer Alphabetical Sorting?


While the keyword list will leave the organisation up to you, it is possible to manually sort the entire list alphabetically whenever you wish to do so, via the **Edit ▶ Sort ▶ Sort Ascending** or **Sort Descending** commands.

### Assigning Keywords with the Panel

Use any of the following methods to assign keywords from the panel to documents in the main project window:


- Select and drag the desired keywords from the panel and drop them into the keywords pane in the inspector, a Quick Reference keyword split, the header view above the document editor or onto the document in the binder, corkboard or outliner.
- If there is a multiple selection in the binder, corkboard or outliner then all selected keywords will be applied to all selected documents.
- Hold the **Option** key down whilst dragging to drag not only the keyword but also any parent keyword(s) under which it is grouped.



- Right-click on the selected keywords (or use the  button) and select the “Add Keywords to Selected Documents” command. This method will apply the selected keywords to all documents within the active Scrivenings session.
- Cut, Copy and Paste can be used to spread keywords around between any context where they can be selected and edited.

### Removing Keywords with the Panel

If you need to remove a specific keyword from an item, it will be easiest to do so from its keyword list in the inspector’s metadata tab. However in cases where you need to remove a keyword from several documents at once, the project keywords panel is the best place to do so:

1. Select the documents you wish to remove the keyword from, in the binder, outliner or corkboard.
2. Open the Project Keywords panel and select the keywords you wish to remove from the selected documents.
3. Right-click on the selected keywords (or use the  button), and use the “Remove Keywords from Selected Documents” command.

### Changing Keywords Globally

Intuitively, if you change the name of a keyword from the Project Keywords panel it will be altered throughout the entire project. Likewise changing the colour can be done from this panel. To do either, first use the **Project ▶ Show Project Keywords** menu command to load the keywords panel.

To change the name of a keyword:


1. Double-click on the name of it in the panel, or press the **Esc** key, and edit the label.
2. Click elsewhere to confirm your change, or press the **Return** or **Esc** key.

To modify the colour assigned to a keyword:

1. Double-click the colour chip itself.
2. This will bring up the standard colour chooser. Close this panel when you are done.
3. You can recolour several keywords in a row by leaving the panel open, then selecting the next keyword and choosing a colour.

## Deleting a Keyword from the Project

To fully remove a keyword from a project, not only from the master keyword list but from every item that was using it as well, you will need to use the Project Keywords pane:

1. Open **Project ▶ Show Project Keywords** ( ⌘ K).
2. Select the keyword(s) you wish to remove. You can select multiple keywords with the **Shift** and **Cmd** keys.
3. Click the **—** button in the footer bar, or press the **Delete** key on your keyboard.

For keywords that were not assigned to any items in the binder, this will be done silently and without confirmation. If a keyword is in use, then you will be warned and asked to confirm the removal.

## Searching by Keywords

Although you can manually run a project search ([section 11.1](#)) for keywords, the Project Keywords window provides a convenience button for this that will set things up for you.

1. Select the keywords you need to hunt down, from the floating window.
2. Click the magnifying glass button in the bottom right-hand side of the panel.

There are optional search modes that can be accessed by right-clicking on the button. Upon selection of one of the following search tools, the desired search will be immediately used, or updated if the Search Result list is already showing:

- *Search Keywords Only*: this is the default search mode. The project search tool will be set so that only keywords are scanned throughout the project.
- *Search All Content*: words found in text that match the keywords will be looked for in *all* searchable areas of the project—in the main text editors, through binder titles, custom metadata, labels, synopses and so forth.
- *Show Document with No Keywords*: simply put, any documents in your project that have no keywords assigned to them will be returned in the result list. This setting requires no keyword selection, nor will it use one.

If you have selected more than one keyword, then only those documents that contain *all* of the assigned keywords will be returned (boolean AND). If you would prefer *any* (OR) of the keywords instead, then click the magnifying glass icon to the left of the project search field, and select “Any word”.

### Are These Regular Project Searches?

Yes, and no. The search engine being used is of course the standard project search tool, and you will get results just like you do when searching a project normally. However the keyword search utility will not permanently change your search settings. If you dismiss a keywords search and then type in the same keyword again by hand into the project search tool, the search result will likely be different unless your settings just so happen to perfectly match one of the presets described above.

## Importing and Exporting Keywords

If you would like to copy keywords from one project into another, follow these steps:

1. Open both projects, and in each, use the **Project ▶ Show Project Keywords** menu command to open their respective keyword lists.
2. Select the keywords you wish to copy from one list and drag and drop them into the other project's keyword list. Colour assignments will be preserved. This will always duplicate the keywords into the new project, so existing keywords with the same name will not be overwritten.

There may be cases where you want to either preserve your keywords outside of Scrivener, or bring in a list of words to be used as keywords. Scrivener supports dragging or copying and pasting into, and out of, any text editor as well.

- *Export*: select the keywords you want to export and drag or copy and paste them into any text editor in any program.

This will create a comma-delineated list of terms.

- *Import*: as you might have suspected, the list of terms you created when exporting keywords can be dragged or pasted straight back into a Project Keywords pane to import them as keywords.

In addition to comma-delineated lists, you can also format your list as one keyword per line.

### See Also...

- Project Search ([section 11.1](#)): although the panel has a useful button for invoking a project search, it might be a good idea to know how that feature works as well, so you can fine-tune results if needed.
- Metadata inspector tab ([subsection 13.5.3](#)): you will most often interact with keywords in the inspector's metadata tab, assigning them to documents directly.

### 10.4.6 Exporting and Printing Metadata

All metadata can be exported in a variety of ways, usually text-based for maximum compatibility, so you needn't fear having important organisational information being "locked-in" with the project format. Metadata can be exported in the following fashions:

- *Compiling*: you can include the metadata for each section of your draft when compiling, by setting up Section Layouts designed for that purpose ([section 24.2.1](#)).

Additionally, Scrivener comes with placeholder codes that can be used to print metadata when compiling. You will find a list of these placeholders in the **Help ▸ List of All Placeholders...** menu command. In conjunction with the Section Layout feature, the possibility for creating your own template outputs for metadata are endless, but you can also simply print metadata directly into the content area by adding the placeholders into the text editor.

- *File export*:
  - With **File ▸ Export ▸ Files...**, metadata can be exported as sidecar .txt files along with the content ([section 25.2](#))
  - Using **File ▸ Export ▸ Outliner Contents as csv...** every single type of metadata in the software can be exported to spreadsheet format.
- *Printing*: when printing documents from the editor, there are numerous options available for including metadata ([chapter 26](#)).
- *Drag & Drop and import*: When dragging documents from one Scrivener project to another, or using the **File ▸ Import ▸ Scrivener Project...** menu command, all metadata will be preserved where applicable. In some cases, like custom metadata, matching fields will need to be prepared, as new field types will not be created in the target project with drag and drop.  
Refer to Copying Settings Between Projects ([section C.1](#)) for general information on transferring metadata *settings* from one project to another.
- *Outline and Corkboard printing*: both of these printing methods optionally allow metadata to be used in the printout. Unlike the above two examples, these allow for a more fine-grained approach, letting you export just the label or keywords if you want.

### 10.4.7 Setting Metadata to Many Items

The inspector provides a simple interface for adjusting metadata, but it only works on one selected item at a time. Some kinds of metadata can be set in a bulk, or batch fashion using other means. How to do so depends on the kind of metadata you want to change:

- For *keywords* use the project keywords panel ([section 10.4.5](#)).
- For *list* types, such as the Section Type, Label, Status and custom lists:
  1. Select the items you want to bulk change. This can be done with the binder sidebar, corkboard or outliner.
  2. Right-click on the selection.
  3. In the contextual menu, examine the field name you want to change, and from its submenu select the value to set the selected items to.
- For *checkbox* types you will need to use the outliner.
  1. Select the items you want to bulk change. The selection can be made from anywhere, but the result will need to be viewed in the main editor using the **View ▶ Outline** group view mode ([section 8.3](#)).
  2. Use the **View ▶ Outliner Options** submenu to add the field you want to change.
  3. There are now two approaches you can take:
    - a) **Option-Click** on any of the checkboxes to toggle all of the visible checkboxes along with it.

The key word here is *visible*. Use the outliner's ability to collapse trees of items in your favour, if you only want to impact certain levels of items.
    - b) First select, using the **Shift** and **Cmd** keys to do so, and then **Option-Click** on any of the checkboxes within the selection. The behaviour will be as described above, but it will only toggle the checkboxes in the selected rows.

The other forms of metadata, such as freeform text fields and dates, cannot be changed in bulk.

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# Searching and Replacing

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Being a tool designed to bring research, writing materials and the work itself all together into one interface, methods for searching through the haystack and finding your needle of the moment are paramount, and recognised with filtering and searching tools at every level of the software, from the binder on down to finding specific images within your text.

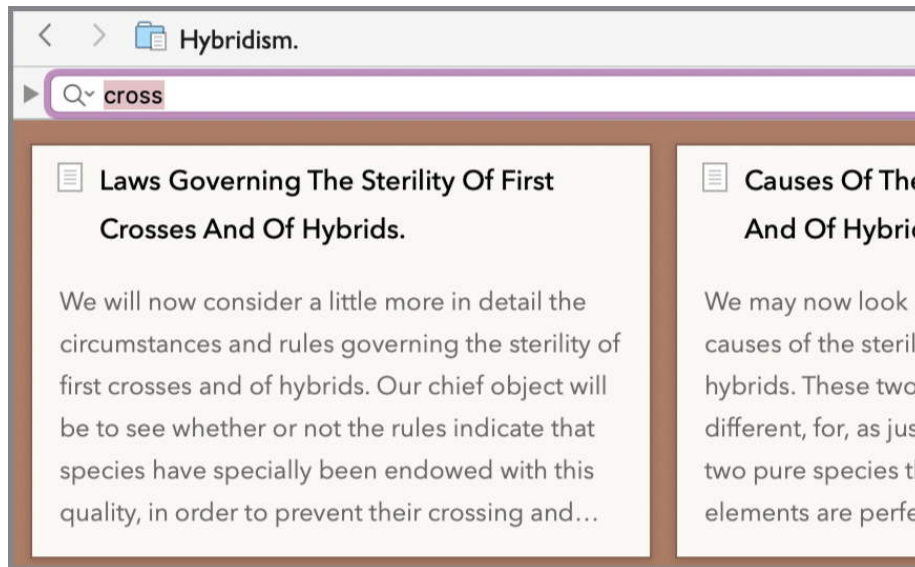
The first two methods we will look at cover most basic needs:

- Project Search ([section 11.1](#)) is a binder tool that can scour the entire project’s text content and return a list of matching items, right in the sidebar itself. Hosting the search result list in the sidebar means full access to the same document management tools you would use in the binder.
- Document Find and Replace ([section 11.2](#)) helps you locate instances of text within an editor, in a familiar step by step fashion through the text, or even within smaller bits of text, like the synopsis area in the inspector. This tool is also capable of replacing text.

The rest of this chapter will cover tools for handling specific types of searching (and replacing):

- Project Replace ([section 11.3](#)) for bulk project-wide replacements, from specific areas of the project, such as selected Titles alone, to complete replacement wherever text can be stored.
- Filter Outliner & Corkboard Views ([section 11.4](#)) for a quick way to find that one card you’re looking for in a folder, or perhaps to only view those items marked as “first draft” in your outliner.
- The Quick Search Tool ([section 11.5](#)) sits in the main application toolbar and serves as a quick way to get to a specific document in your editor. Simply type in the phrase from the document you’re looking for, or part of its name, hit **Return** and off you go.
- Finally, the Find by Formatting Tool ([section 11.6](#)) works a lot like regular text Find does in your editors, using a step by step method, only it is designed to find formatting. Search by styles, inline annotations, comments, footnotes, images, tables, links, colours & highlights and more. Unlike regular Find, this tool will by default jump from one text file to the next in the binder, in the direction you are searching (next or previous).

If a search tool has a small magnifying glass icon with a downward facing arrow to the left of the area where you type in text, options will be placed there to



**Figure 11.1** Filtering the corkboard: the magnifying glass icon in the search field grants extra searching options.

modify the search. In the case of [Figure 11.1](#), we can click on this icon to broaden the search to include all text and notes (rather than just the stuff we can see on the index cards), or gain access to the regular expressions ([section 11.7](#)) search syntax.

## 11.1 Project Search

With the Project Search tool, you can quickly scour the project and get a list of every matching document in the sidebar. This can be as simple as typing in the word “hello” and finding every item that has that word in it (and by that we mean nearly everything about a document that consists of text, from assigned keywords, labels, the title to its synopsis and so on). There are a bounty of options for putting together some fairly surgical searches too, should you need them.

### 11.1.1 The Basics

Project search gathers all matching binder documents into a list in the left sidebar, temporarily replacing the binder. You can think of it as a way of “filtering” the binder so that it only shows those items that match the search. Searching in this fashion is more like searching the web for pages, or your email inbox—and as with these kinds of tools, once you get into a specific web page or email, you would then use regular text find to step through matching text to find the specific phrase you are looking for.

To indicate that you are no longer looking at the binder, the background colour of the sidebar will change to purple and some additional controls will be added to the top of the sidebar. When you are ready to dismiss the search and

return to the binder, click the small  $\times$  button in the sidebar heading, marked (a) in [Figure 10.4](#), or simply tap **Esc** while in the search field to dismiss the search results (and tap **Esc** again to dismiss the search field itself).

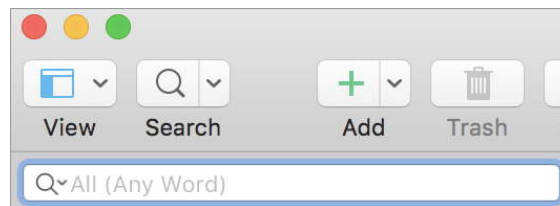
### Can I easily get back to a search list?

Yes! Search results are stored into a special collection that cannot be removed, which always stores the last search you used, even after closing and reopening the project. If the list of collections is hidden, the easy way to get back to your search list will be with the **Navigate ▶ Collections ▶ Search Results** menu command. Otherwise, it will be easiest to simply click on the “Search Results” collection tab in the list. For more about navigating among and using collections in general, read [Using Collections \(section 10.2\)](#).

## Starting a New Search

There are two ways to start a new project search:

1. Click the “Search” button in the toolbar to reveal the search field ([Figure 11.2](#)).
2. Use the command, **Edit ▶ Find ▶ Search in Project...** ( $\text{⌘} \text{⌘} \text{F}$ ), to open the field and place the cursor there in one move.



**Figure 11.2** The default project search field, with the “Search” toolbar button above.

Now all you have to do is start typing. As you type, matching documents will be returned to you in the list below the search field. When nothing is entered in the search field, greyed out text will inform you of the current search mode. By default this is “All (Any Word)”, meaning all searchable elements in the project will be examined with the “any word” operator—any word you type in will result in a match if the document contains it somewhere.

The search scope, data type, and operator mode can be adjusted via the project search options menu. Click on the magnifying glass to the left of the typing area

in the search field (Figure 11.2) to review the available options.<sup>1</sup>

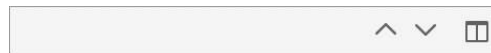
## Finding Matches in the Editor

In addition to highlighting all matched text for easy visual recognition, the text you searched for will be automatically loaded into the text find tool for you. This means you can immediately use the keyboard shortcut to find the next search result within the main editor (**⌘ G**), even without loading the Find window beforehand. Refer to Document Find and Replace (section 11.2) for additional details on this tool.

If nothing is found, bear in mind that searching the project can examine many different types of elements, the matched text may not be in the main editor—it might be a label or keyword, for example.

## Browsing and Sorting Results

You can use a search result list just like you would use the binder normally. Otherwise, while typing in a search, you can flip through search results with the **↑** and **↓** keys on your keyboard, loading the result into the currently active editor (use the **Tab** key to move your cursor into the result list itself). Refer to the section on Selecting Items (subsection 6.3.2) for tips on viewing multiple items.



**Figure 11.3** Use the “Previous” and “Next” document buttons to flip between search results.

From within the editor context, you can jump from one search result to the next using the “Previous” and “Next” document buttons on the right-hand side of the editor header bar (Figure 11.3), or use the associated keyboard shortcuts: **⌘ ↑** and **⌘ ↓**.

The list of results can also be sorted, using the control marked (c) in Figure 10.4:

- The **Binder Order** is the default, merely listing items in the order they are found within the binder.
- **Sort by Title**: sorts by the visible title in the list, including any automatically generated titles if the items do not have specific names given to them. When using this sort mode, the **A-Z** option becomes available. Disable it from this menu to search in descending order instead.

<sup>1</sup> If for some reason the search field is visible but you haven’t used it yet, the standard but somewhat odd macOS behaviour of disabling the control will be in effect. If you want to go directly to the magnifying glass menu, click where the magnifying glass *will be* once the field is active. This will activate the field and bring up the options menu in one click.

- **Sort by Date:** sorts the list by Created Date in ascending order. When using this sort mode, the optional behaviour becomes **Newest First**, and is disabled by default.

## Locating Results in the Binder

In addition to locating and reviewing content itself, you might want to use the Project Search feature purely as a way of locating and selecting matching items in the binder itself. Since searching uses the binder sidebar itself to show the result list, you will need to use the **Navigate ▶ Reveal in Binder** (`⌘⌘R`) command to close search results and return to the binder with each selected result highlighted in the binder. This command will expand any hierarchy necessary to fully reveal the selected items.

The command can also be used from the editor to reveal then item you're currently reviewing.

## Refreshing Results


As you type, the contents of the search result list will refresh dynamically, narrowing down the result efficiently. However once you've stopped typing, actions taken elsewhere in the project window that might impact search results will not update the list. This allows you to work off the list without it constantly changing beneath you. To manually refresh the results click into the search field and hit the **Return** key.

For cases where you've loaded search results into an editor (as above), you can refresh the list by clicking the button to load the list into the editor again, or simply navigate away from and then back to the list with the history buttons.

### Project search finds nothing, or not everything it should.

Project Search has a number of options, some of which are telegraphed as grey placeholder text when the search field is empty. If you get unusual results, double-check search settings as described in the following sections, by clicking on the magnifying glass button to the left of the text field itself. You can also reset search options to default from this menu ([section 11.1.2](#)).

## Taking Results to the Editor

In some cases you may want a little more space to work with your search results, or access to some of the powerful capabilities afforded by the outliner and corkboard view modes. At any time, click the  button marked (b) in [Figure 10.4](#) to load the contents of the sidebar list into the active editor.

This is also a great way to search *again*, if the initial search result was too broad and you want to search by a second factor. With the focus in the editor, press `⌘F` to bring up the outliner & corkboard search tool ([section 11.4](#)).

### 11.1.2 Search Settings

All project search settings are accessed via a menu interface. Bring it up by clicking on the magnifying glass to the left of the search field.

#### Search In

The initial section of the options menu is for selecting the type of element that project search should look within. You can select multiple elements by holding down the **Option** key and clicking on a type. **Option** clicking can also be used to toggle a field off without disturbing the overall multiple selection. To return to using a single element, either select “All”, or select any element without using the **Option** key.

- **All:** the default search mode. Every element of an item containing searchable text will be queried for matches.
- **Title:** only the titles of binder items will be searched.
- **Text:** the text contents of files and folders will be queried. This does not include notes and synopses.
- **Notes:** an item’s inspector notes will be searched.
- **Synopsis:** the synopsis field for each document will be searched. This is anything that has been typed into the text area of an index card or in the synopsis portion of the outliner, not any text automatically generated for the corkboard.
- **Keywords:** matches found within an item’s keyword list. You can also perform keyword searches quickly by using project keywords panel ([section 10.4.5](#)).
- **Label:** the text (not colour) of the label metadata will be searched. Note the name of this metadata field can be changed per project. Available labels and status for the project can be referenced in the Project Settings: Label & Status List panes ([section C.3](#)).
- **Status:** the text of the status metadata will be searched. Note the name of this metadata field can be changed per project.
- **Section Type:** documents can be searched for by their type. This makes it easy to hunt down all items flagged as being a “Chapter” for instance, or a “Figure”. A project will list its available section types in the Project Settings: Section Types pane ([section C.2](#)).

Following the standard list above, any custom metadata fields you’ve added to the project will be listed in a separate section. Select from these to search within that field specifically. How searching works within the field is determined by its type (“text” type metadata fields work identically to all other text searches):

**Checkbox** Search by “yes”, “true” or “1” to find all items that have been checked. Searching for “no”, “false” or “0” will return those items that have not been checked.

**List** These work just like the status and label elements do, using regular text searches to find which items match the text you’ve typed in.

**Date** Search by any part of a date as text. For example “04” would return items set to April, but it would also find items set to the 4th day of any month. You can type in more of the date to be more precise, such as “2017-04” to weed out those using the 4th day.

In addition to matching dates by text, you can use our relative date matching syntax as well. Refer to Searching by modification and creation date ([section 11.1.3](#)).

## Operator

Select the method by which your text will be used by the search engine:

- **Any Word:** the default search method. Queried documents must contain at least one of the words typed into the search field. Analogous to logical OR.
- **All Words:** every word entered into the search field must be present. Documents which only match some of the words will not be returned. Words can be entered in any order. Analogous to logical AND. You can also enter double-quoted phrases mixed in with single words, working in the same manner as **Exact Phrase**, below.
- **Exact Phrase:** what you type into the field will be queried precisely as it is typed in. “The book” will only match documents that have the phrase “the book” as written, not documents that just have the word “book” or the phrase “book the”. It will also return documents that contain “the books”. For exclusive matching, use **Whole Word**.
- **Whole Word:** unlike any of the above search methods, the term supplied will only match whole words. A search for “Jo” will only return documents with that word, not documents that also contain “Jocelyne”.
- **RegEx:** enables the powerful Regular Expression search syntax ([section 11.7](#)).

## Options

Provides a few extra options, as well as setting scope limiters. Scopes instruct the search engine to only scan select parts of your binder.



- **Search Draft Only:** will only look in the “Draft” folder of the binder. Note that if the name of draft folder has been changed in the project, the title of this option will reflect that name change.
- **Search Binder Selection Only:** preselect items in the binder and then perform the search against those items only. The selection you make will implicitly include all subdocuments as well in the selection. So if you wish to search an entire “chapter folder” with many subsections within it, you need only select the one master folder.
- **Exclude Trash Documents:** ordinarily, items located in the trash will be discovered by search results, represented by faded icons in the search results list. If you’d rather not see them at all, use this option to disable Trash folder searching. This option is not used by Saved Search Collections.
- **Search “Included” Documents:** regard documents that have been marked as “Include in Compile” in their metadata. This option can be combined with the below, and one must always be selected (otherwise you wouldn’t find anything!)
- **Search “Excluded” Documents:** regard documents that have not been marked as “Include in Compile” in their metadata. This option can be combined with the above, and when both are selected, this particular setting will be ignored.
- **Case Sensitive:** by default, the search engine ignores letter case. If you need to search for proper nouns and are getting a lot of false positives, this option can help.
- **Ignore Diacritics:** those symbols used to mark letters, such as ‘é’, will be ignored, meaning that é = e for the purposes of search results.
- **Invert Results:** all of those items that do *not* match the current search criteria will be listed. For example, if you search for the label, “Red”, then only items not marked with the red label will appear.
- **Find Duplicates:** the search result list will be checked for items with duplicate content within them. Items not matching search results will not be found. For more information on how this feature works, refer to Finding Duplications ([section 11.1.3](#)).

## Resetting Search Options

To reset all search settings to a few simple default settings, select the “Reset Search Options” command in the magnifying glass menu. This will change the settings to the following settings:

- **Search in:** All

- **Operator:** Any Word
- **Options:** all disabled, save for the two toggles to search for both “included” and “excluded” documents.

### 11.1.3 Special Search Terms

Beyond simply typing in the text you want to find, there are some useful tricks you can use to narrow down your search further, or even mix certain types of search together.

**Mixing exact phrases with all words** If you want to find every document containing a word as well as a particular phrase, put the phrase in double-quotes while leaving the search operator set to “All Words”. The term `Bob "black car"` would locate all documents referring to a “black car” that also mention Bob. The quotes cause the phrase to be treated as a word.

**Finding things that don’t have a word** Sometimes the most efficient way to make a long list of search results shorter is to omit the most common word that you aren’t looking for. Place a hyphen directly in front of such a word to remove it from the list of possibilities. A simple example would be to search the “Text” for `Lydia -Dovahkiin`, to find all documents mentioning Lydia that do *not* also refer to a certain individual named Dovahkiin.

This technique can be used with the Any Word and All Word operators. It can also be combined with quoted phrases. For example, `Lydia -"Needs Proofing"` could still include documents that contain both “Lydia” and “needs” or “proofing”, but never when the two latter words form a phrase.

**Finding everything** To return a list of everything in the project, use the universal wildcard by typing in a *single* asterisk (\*) into the search bar. It can sometimes be useful to build a list of all items in the binder, usually in conjunction with loading the search result into an editor, where you can do such things as sorting by label to view your binder clustered by label assignment, or by modification date to review recently changed files.

If you want to find an actual asterisk all by itself, then set the search **Operator** to “RegEx” and search for `\*`.

**Finding everything by type** The above method of using a single asterisk can be combined with all available search options. For example: you can find all items in the Draft folder, or all items that have had a label (any label at all) assigned to them, or with the “Invert Results” option, you can find all item’s that *don’t* have a label assigned yet.

## Searching by modification and creation date

A common desire is to locate items that have been modified recently, or to find files that were created within a certain window of time. Scrivener supports these operations and many more besides, using its special date search syntax.

When suffixing a search term with either of the keywords `mdate:` or `cdate:`, project search will combine the current “Search In” settings to also search for Modified Date or Created Date respectively. When used alone, they will simply return a list of all documents based upon that date request. Thus a search for `'cdate:2017'` will return all documents created in the year 2017. Searching for `'Ourense cdate:2017'` will find documents referring to this city, created in the year of 2017. Refer to [Table 11.1](#) for detailed information on the available search codes.

If you'd rather not have to remember these search terms, you can also simply right-click on the magnifying glass icon and select “Search Modified Dates” or “Search Created Dates” to insert the term for you. Doing so will replace whatever you've already typed in.

## Finding Duplications

Discovering binder items with duplicated information can be useful for a variety of tasks. You might simply be trying to clean up an “inbox” style project that may have had material inadvertently imported more than once over the years. Or maybe you need to verify that your draft folder has no duplicated titles within it.

Project search can be set to **Find Duplicates**, in the search option menu. This option works *after* a result list has been assembled, and thus only scans for duplications within the list. All unique search results will be removed, presenting a list of only those items with duplicate data. In this mode, the default “Binder order” sort method will cluster duplicated items together, even if they nowhere near each other in the binder itself.

What is considered duplication depends on the “Search in” setting:

- **All:** the items must be complete duplications in every way.
- **Label:** when searching for an individual type of metadata, such as the label, only documents with duplicate labels will be listed. The items may otherwise be entirely unlike one another.
- **Multiple fields:** if more than one metadata field is selected, then duplication must occur in each of the selected fields/

For cases where you are looking for matching fragments of text, down to the sentence level of granularity rather than wholly duplicated texts, the Matching Text Finder ([subsection 13.4.4](#)) tool will better help you.

**Table II.I** Date Search Syntax

Search Term	Description
<b>By a Given Date</b>	
YYYY-MM-DD or YYYY/MM/DD	Find everything from a specific day, such as 2017-04-08, which will find everything on the 8th of April, 2017.
YYYY	All entires found within the specified year.
<b>By a Relative Date</b>	
#d	Find everything written since the number of days specified. Eg. “7d” would find everything edited within the last week. Use “od” to search for dates matching today (whereas id would include yesterday as well).
#m	As above, but using months. Eg. “6m” will find everything edited in the past half year, or six months.
#y	As above, but using years.
<b>Searching Before and After</b>	
>	Expands any of the above forms to also find everything since the given date. >2014 will provide a list of all edits within the year 2014 or later, while 2014 by itself just returns edits from within that year. Those that work that way inherently do not require the bracket, thus >7d is the same as 7d by itself.
<	As above, but in this case edits found on or <i>before</i> the given date. Thus <2y will return everything older than two years.

## Combining Search Terms

Most of the techniques we've discussed can be combined together to create more specific and complicated search criteria. Here are some examples:

- If you are searching in the “Notes” field for the word “ToDo”, but only want to find those documents that haven't been modified recently, you would use the term, `ToDo mdate:<6m`, which would find every document with “ToDo” in the inspector notes that hasn't been modified in the past six months.
- You can search for all documents with the “Needs Formatting” keyword that has *not* been marked with a status of “Rough Draft”, by setting **Search In...** to both “Keywords” and “Status”, the **Operator** to either “Any Words” or “All Words”, and finally typing in `"needs formatting" -"rough draft"`.
- Searching in **Status** and **Keywords** for “First Draft”, with **Find duplicates** enabled: in this case either the Status or Keywords metadata fields must contain the phrase “first draft” (in this case Status most likely will), and then duplications will be checked for *both* fields. Consequently only those items set to First Draft status that contain an identical keyword list will be ultimately listed in results.
- Let's say you have a custom metadata field, called “Published”, which is a simple checkbox. When searching by this field, `yes cdate:2014` returns all documents marked as published that were created within the year 2014.

Refer to [Table 11.1](#) for a complete list of available date searches.

### 11.1.4 Save Search As Collection...

With so many different options you might be looking for a way to save “smart folders” or searches. The command at the bottom of the options menu will save your current search settings into a search result collection ([subsection 10.2.4](#)). As with search results, these collection tabs will build a list of results whenever you load them.

### 11.1.5 Using a Saved Search Collection for New Searches

Whenever you click on a saved search tab (or use any method at all to load a saved search into the binder sidebar), all of the settings that were used to establish that list will be loaded into the project search settings for you, meaning the collection tab could be less about the list of documents it generates when you click on it, and more about the diverse options it sets when doing so.

1. With the collection tabs open, click on the search collection containing the type of search you want to repeat with a different term. Or use the **Navigate ▸ Collections ▸** submenu to load the list directly into the sidebar.
2. Use your preferred method to invoke project search and type in a new term.
3. The result will be to create a new Search Result list using all of the settings stored in the saved search.

You could update the search collection ([section 10.2.4](#)) if you intended to use this variation more frequently for a while, or even create a new search result collection entirely.

An applied example of where this might be useful is if you've set up a few different options to look for a character by name, looking only within the manuscript, to only consider whole words, be case sensitive and ignore all documents excluded from compilation. The saved search result will remember the name of the character you typed in at the time it was saved, but you can easily use that search as a springboard for hunting down *any* character by name, by bringing up the project search field and typing in a different name.

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## 11.2 Document Find and Replace

As with many programs that work with text, you are provided with a standard find and replace window which can be called up while the keyboard focus is in any text area, with **Edit ▸ Find ▸ Find... (⌘F)**. The find panel operates only in the current context. To replace text throughout the entire project, use Project Replace ([section 11.3](#)); to search for text in all documents, use Project Search ([section 11.1](#)).

The buttons along the right of the window will take action on the settings you apply to it: The **Next** and **Previous** buttons will jump from one result to the next, using the current selection or cursor position as a starting point. When the last match is discovered the tool will wrap around to the end or beginning of the document as needed, and continue searching.

To close the tool, either click the appropriate icon in the title bar, use **Return** to find the next match and close the window automatically or tap the **Esc** key.

### Finding and Replacing Text in Footnotes and Comments

Find and replace will function on any comments or footnotes in the inspector pane ([section 18.3](#)), even if the keyboard focus is in the main editor. Replace will always work, even if the inspector is closed, but for Find to highlight matches, the inspector must already be open.

### 11.2.1 Find and Replace Options

There are three replacement options:

- **Replace:** replaces the currently selected text with the contents of the “Replace” field. This works on any selection, but will most often be used after clicking the **Next** or **Previous** buttons.
- **Replace & Find:** equivalent to clicking the **Replace** button followed by the **Next** button.
- **Replace All:** replaces all matches from the “Find” field in the current text with the contents of the “Replace” field with no further interaction. The total number of replacements that were made by the last use of this button will be printed in the lower-right corner of the window.

**Replace All Scope** These two options determine the scope of how much text will be impacted when clicking the **Replace All** button:

- **Entire Document:** all of the text in the current view (which may be multiple documents when using Scrivenings mode) will be searched and replaced.
- **Selected Text:** only the selected text will be searched and replaced. Since this command will remove the selection, it means you will need to apply a new selection if you intend to continue searching and replacing this way.

**Find Options** These options impact how the text within the “Find” field is treated. They are used for both regular searching and replacing:

- The mode dropdown at the top contains the following options:
- **Contains:** the tool will find any sequence of text that matches what has been typed into the “Find” field, even if it is found within a word.
- **Starts with:** text will only be found if a word begins with the supplied text.
- **Whole word:** only words that match the text from start to finish will be matched. For example, “sam” will only find that word, not “Samantha”.
- **Ends with:** text will only be found if the word ends with the supplied text.
- **Regular Expression (RegEx):** enables the regular expression search syntax for *both* “Find” and “Replace” fields. When replacing, refer to a stored value from the initial search pattern using Perl-style (\$1, \$2...)



syntax for doing so. The find tool cannot work with whitespace symbols, such as `\n` and `\t` in the replacement field. Use literal whitespace characters instead (which can be inserted with **Spacebar**, `\Return` and `\Tab`).

- **Ignore Case:** the letter case typed into the “Find” field will be ignored. Thus “sam” will not find “Sam”.
- **Ignore Diacritics:** accents on characters will be ignored. Thus “naïve” will also find “naive”. This option is not available to the stricter regular expression mode is enabled.

### 11.2.2 Searching with the Keyboard

In addition to the buttons available in the panel, there are some keyboard shortcuts you can learn which can reduce the reliance upon clicking within the panel to carry out searches. These commands are also available in the **Edit ▶ Find ▶** sub-menu:

- **Return:** nearly synonymous with clicking the “Next” button, with one important difference, the Find window will be automatically dismissed after you press Return. The search term will be saved however, allowing you to continue using the two following shortcuts without any interface in your way.
- **⌘G:** finds the next available match; will wrap around to the top of the document if there are no more matches available below the current point. This command works even if the Find panel is closed, and it will operate off of the last active editor split (even if that split is not focused, though searching will move your keyboard focus to the editor)
- **⇧⌘G:** finds the previous match; as above, but will wrap around to the bottom of the document. As with forward searching, this command uses the last active split and will focus the editor as necessary.
- **⌘E:** used to load the currently selected text into the “Find” field without opening the panel. Using this method you can easily locate further occurrences of existing text without any user interface, when combined with the next and previous match shortcuts, above.

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## 11.3 Project Replace

The menu command, **Edit ▶ Find ▶ Project Replace...** provides the utility of replacing text throughout the entire project. A progress bar at the bottom of the dia-

logue shows you the progress of the replacement operation—bear in mind that this could take a little while on large projects.

### There's No Going Back From Here!

Given that this process must go through all of the documents in your project, opening and closing them as it goes, Project Replace cannot be undone (and you will be warned when you try)! You can use the **Swap** button to exchange the search term for the replacement text and try to inverse the replacement operation, but in some cases this might have unexpected results. The best course of action is to take a back up prior to using this tool (the **File ▶ Back Up ▶ Back Up To...** command is particularly handy for cases like these). A simple mistake can render your entire draft illegible, or even worse, produce subtle flaws that are difficult to find without reading the entire work.

To include carriage returns or tabs in your search or replacement field, hold down the **Option** key and then press **Return** or **Tab**, and **⌘Return** for line feeds. For your convenience, invisible characters will be printed using visible symbols.

**Replace** Here is where you will type in the text used to look for matches. This can be pre-filled using the **Edit ▶ Find ▶ Use Selection for Find** menu command (**⌘E**).

**With** The text provided in the first box will be replaced with the text provided here. This can be empty if you wish, having the effect of removing the phrase from the project wherever it occurs.

**Swap** Click this button to swap the contents of the **With** field for the **Replace** field. Maybe you didn't want to change the name of your antagonist after all!

**Search mode** The dropdown menu below the swap button, and the two checkboxes following it, are where you will set how the text in the **Replace** field should be evaluated. The rules here are identical to those documented previously ([subsection 11.2.1](#)). The **Whole Word** option in particular can be useful here; without it, searching for the character name “Sam” and replacing it with “Joseph” could end you up with such (bleakly) amusing concoctions as “Josephe” in place of every “same”.

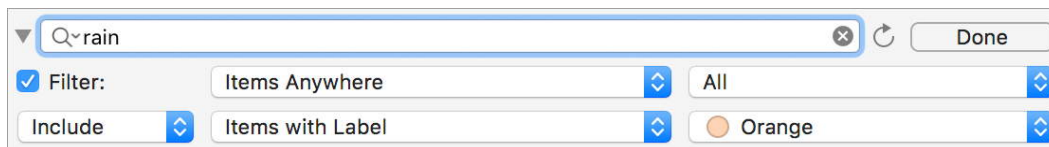
**Scope** Set whether the entire project should be modified, or only those items that you have previously selected in the binder, corkboard or outliner. This requires an explicit selection of each item that should be impacted. Child items of folders will not be modified.

**Affect** Select which elements of each binder item this command should modify.

- **Titles:** the titles of the documents as they appear in the binder.
- **Text:** standard text editor contents (including any linked footnotes and comments from within that text).
- **Notes:** any inspector note fields that are attached to documents.
- **Synopses:** the text content of each index card.
- **Custom Metadata:** text type custom fields will have their text examined and changed.
- **Snapshots:** archived snapshots will be changed (take special care with this one, as snapshots are typically an internal backup mechanism) as well as any linked footnotes and comments originating from those snapshots.

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## 11.4 Filter Outliner & Corkboard Views



**Figure 11.4** Outliner and corkboard views can be filtered by a variety of criteria.

The corkboard and outliner views are capable of simple filtering, making it a cinch to quickly find that one text file you know is somewhere in a list of a hundred cards in a folder, or to only show rows in the outliner that have been labelled a certain colour, to name a few.

A filtered view has certain limitations owing to how it filters items directly in the same view. When using a filter the matching items will be presented in a flat list and you will be unable to reorder or create new items within that list. In this fashion it is similar to how multiple selection work ([section 6.4](#)). Similarly, label view and freeform corkboards cannot be filtered directly—the result of filtering these views will be to revert to a flat list so long as the filter is applied.

Filter settings will be remembered per each split for the current session. All of the settings that you applied the last time the filter was used will be reapplied automatically when calling up the filter panel. This can be useful when navigating to search results and then using history to return to the view—you can press ⌘F to return to the filtered view after ⌘[ to go back in history.

### 11.4.1 Starting a New Filter

Start a new filter on the current corkboard or outliner by using the **Edit ▶ Find ▶ Filter...** menu command (⌘F), type in the text you're looking for, and Scrivener

will start scouring through all visible text in the view and present a list of only those items that contain matching text.<sup>2</sup>

To move the focus into the search result list, press the **Return** key.

**Magnifying Glass Menu** There are two additional options that impact what will be found based on what you type in the search field. Access them by clicking the magnifying glass button, to the direct left of where you type in the search text.

- **Include Text and Notes in Search:** to broaden what is found, beyond what you can see in the view you are filtering, this option will include the main text content (available for folders and files only) and document notes ([subsection 13.3.2](#)).
- **Use Regular Expressions (RegEx):** enables regular expression syntax support.

**Additional Filtering Options** To the very left of the panel you will find an expansion arrow that when clicked will reveal additional options for searching by compile status and metadata. [Figure 11.4](#) displays the filter panel with this additional section opened. You will need the panel expanded, and the **Filter** checkbox enabled, to access the following two sections.

### 11.4.2 Filtering by Compile Status

To get started, click the disclosure arrow on the far right-hand side of the filter panel. The first two dropdown menus along the top contain filters for whether a document is in the draft folder, and whether it is set to be compiled:

**Draft folder status** The first dropdown is for filtering whether or not the items in the view are currently located within the draft folder. This will most often be useful when filtering collections or search results, where the items in the corkboard or outliner may have come from anywhere in the binder:

- **Items Anywhere:** the default setting is to not filter items by whether or not they are in the draft.
- **Draft Items Only:** only those items currently found within the Draft folder will be matched.
- **Non-Draft Items Only:** only those items found *outside* of the Draft folder will be matched.

---

<sup>2</sup> What constitutes *text* is based on the visible information in the view. If you add a column to the outliner, or show status stamps on the corkboard, then any text found within those additional fields will be evaluated along with the rest, even if the visual representation of that field lacks text (like a keyword colour chip).

**Included or Excluded from Compile** Independent of whether an item is in the draft folder, you can filter matches by whether or not their “Include in Compile” checkbox is enabled in the general metadata area of the inspector pane ([subsection 13.5.1](#))

- **All:** the default setting is to not filter items by whether or not they are included in compile.
- **Included:** only those items with the “Include in Compile” checkbox ticked will be matched.
- **Excluded:** only items with “Include in Compile” disabled will be matched.

### 11.4.3 Filtering by Metadata

Although you can add the appropriate column in outliner view to search within it, it may sometimes be desirable to make certain you are only finding results from within that particular metadata field—or on the corkboard to be able to search for fields that cannot be displayed within it. To get started, click the disclosure arrow on the far right-hand side of the filter panel, and look to the bottom row of dropdown menus provided.

**Enable Metadata Filtering** In the first dropdown menu you will want to change the selection from the default “Any” to either one of “Include” or “Exclude”. The former will cause the filter to only return results that match the metadata criteria you set up in the next two dropdown boxes. The latter option will only return results that do *not* match what you specify.

**Metadata Field** Next you will need to specify which metadata field the results should be filtered by, in the second dropdown menu:

- **Items with Label:** filter by assigned labels. The name of this entry may change depending upon project settings for how labels are referred to.
- **Items with Status:** filter by assigned status. The name of this entry may change depending upon project settings for how status are referred to.
- **Items by Section Type:** filter by the type of section a document is. You could for example search for all “Chapter” items in the corkboard, or create a list of all “Glossary Entries”. What choices you have here depend on how you’ve set up your project (or how the project was set up if you’re using an unmodified template).
- The remainder of the menu will list any custom metadata fields that have been assigned to the project.

**Metadata Value** Most of the metadata types available to filter by are list-type fields, meaning there will be a set number of possibilities to choose from in the third dropdown. For example, if you choose to filter by label, you will then select which label to filter by.

The one exception will be any custom checkbox fields. Again you will have a list to choose from, but the choice will be very simple: yes, or no.

### 11.4.4 Resetting and Refreshing Results

To clear the current search term, either press the **Esc** key on your keyboard, or click the **×** button on the right-hand side of the typing area. If the text field is already empty then pressing **Esc** an additional time will close the filter panel.

If items themselves change in such a way that their presence in the filtered list would change, either to be added or excluded, the result will not automatically refresh. You will need to do so yourself by clicking the **↻** button, to the right of the text entry area.

### 11.4.5 Closing the Filter Bar

When you are finished filtering the view, click the **Done** button on the far right of the filter bar to close the panel and restore the view. From the keyboard you can use the **Esc** key to clear the text from the current filter, and when the filter text is empty, **Esc** will also close the panel.

Filters will also be closed automatically whenever navigating away from the filtered view, or when closing and opening the project.

### 11.4.6 Working with Results in Extended Usage

You may sometimes wish to hop back and forth between results without losing your place or having to reset the filter every time you return to the corkboard or outline. There are a few different approaches you can take that avoid navigating with the editor you are filtering from:

- Naturally there is the other split. We've assumed it is being used for something else at the moment however, but this basic approach of selecting a search result and using the **Navigate ▶ Open ▶ in Other Editor** command (**⇧⌘O**) deserves mention.
- Copyholders, particularly with the ability to auto-load the things you click on into the copyholder ([subsection 12.2.5](#)) can be a great way of browsing through and editing a filtered view:
  - I. Select the search result you wish to view and use the **Navigate ▶ Open ▶ in Copyholder** menu command (also available from the right-click contextual menu), or drag it to the editor header bar with the **Option** key held down.

2. The **Navigate ▸ Corkboard|Outliner Selection Affects ▸ Copyholder** menu toggle (or click the “auto-load” button in the footer bar (Figure 12.3) so that it becomes highlights and the arrow is pointing into the box) will make it so what you click on in the editor list will automatically load into the editor’s respective copyholder. If you own a keyboard with a Touch Bar, you’ll find a button on your keyboard that resembles this icon. Use it to toggle the mode on without reaching for the mouse.
  3. If you need to get over to the copyholder view to edit, the **⌘⇧D** shortcut can come in handy.
- If you’re already using the *copyholder* for something as well as the other split, or if you just want the convenience of doing everything in one view, there is a trick for opening all of the search results into the current editor:
1. Select all of the search results you wish to work with (**⌘A** might be easiest here).
  2. Use the **Spacebar** or **⇧⌘O** shortcut, or drag the items to the editor header bar if you prefer the mouse. This will load the selected items into the editor *as a multiple selection* rather than a filtered result of a larger group of items. Now as you navigate into these items and then hit the Back button to return, you will be returning to this selection as your base of operation.
- Lastly, for a more permanent solution, using collections (section 10.2) to store a list of items for future use:
1. Select all of the search results you wish to work with (**⌘A** might be easiest here).
  2. Use the **Documents ▸ Add to Collection ▸ New Collection...** menu command, or select an existing collection.

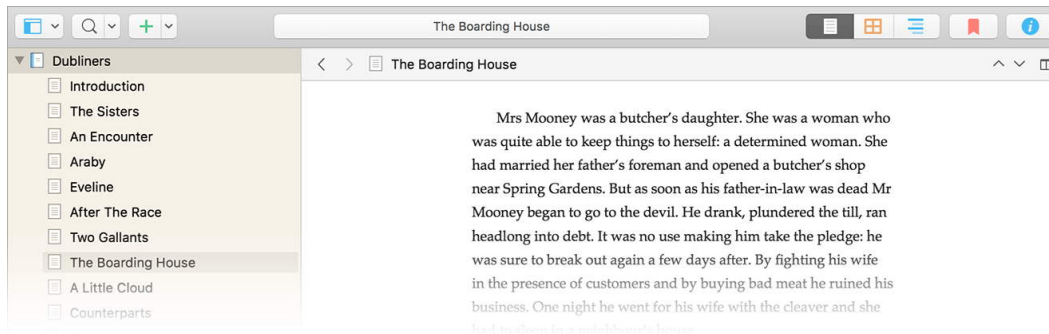
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## 11.5 Quick Search Tool

Sometimes you want to jot down a quick idea or note-to-self within a particular document in your project, but you don’t want to hunt around for it in the binder (maybe it isn’t even visible), or maybe you are already using project search and don’t want to change the settings for one quick lookup. Quick Search bridges that gap, providing a method for quickly locating and navigating to items based on their title, synopsis or text. It is located front and centre in the application toolbar (Figure 11.5).

The name of the document you are currently working on in the main editor will be printed here, for your reference. Think of it a bit like the URL bar in a





**Figure 11.5** The Quick Search tool resembles the URL bar in some Web browsers.

browser. It shows you the page you are viewing, but otherwise you can click into it and type in a new address, or even search for a page by name.

### Looking for a little asymmetry?

By default the Quick Search tool will attempt to keep itself in the middle of the toolbar. If you would prefer to have it off to the side, then right-click anywhere in the toolbar and disable the **Center 'Quick Search'** toggle.

## 11.5.1 Starting a New Quick Search

You can start using it much like you would any search tool:

- Click into the bar to place your cursor there.
- Or, use the **⌘G** shortcut (or the **Edit ▸ Find ▸ Quick Search** menu command) to move the cursor into it.

Once you start typing, search results will begin appearing, narrowing down in scope the more you type. Search will be done by “Exact Phrase”

The list may be categorised with up to three sections of results:

1. *Titles*: prioritised by titles that match what you’ve typed in, or that begin with the typed in text. E.g. if you type in “Research”, you will find it near the top even if there are hundreds of files above it that use that word in their names (unless of course you have hundreds of documents named “Research”, but then this probably isn’t the best tool for the job!).
2. *Synopses*: exact phrases found within hand-crafted synopses (as opposed to preview text generated in such places as the corkboard) will appear listed below titles.
3. *Text*: any documents containing the phrase you have typed, with a little context around the phrase printed for your reference.

**Still can't find it?**

If after typing in a good amount of text you cannot narrow down the list enough to make it useful or find what you are looking for, click the “Full Project Search” button at the bottom of the result list to take your search settings and what you’ve typed so far, into the binder sidebar for further refinement.

## 11.5.2 Using Quick Search Results

Once you have found the item you are looking for, click on the result to load the item directly into the active editor. From the keyboard, use the arrow keys to move the selection bar up and down; pressing **Return** on the desired result. The selection bar automatically highlights the first result in the list, meaning you can always press **Return** to jump to the first result.

Add modifier keys to change how result selection works:

- **Shift** key: load the search result as a Quick Reference panel.
- **Option** key: load the result in the other editor split, creating one if necessary. Split focus will not change, meaning you can look up reference material while writing in the other split.

When selecting from a text-based result (rather than title or synopsis hit) then the first bit of text that matches what you searched for will be scrolled to and selected automatically. The text find tool (**Edit ▸ Find ▸ Find...**) will in all cases be set to your search term, meaning you can use the keyboard shortcut for walking through search results (**⌘ G**).

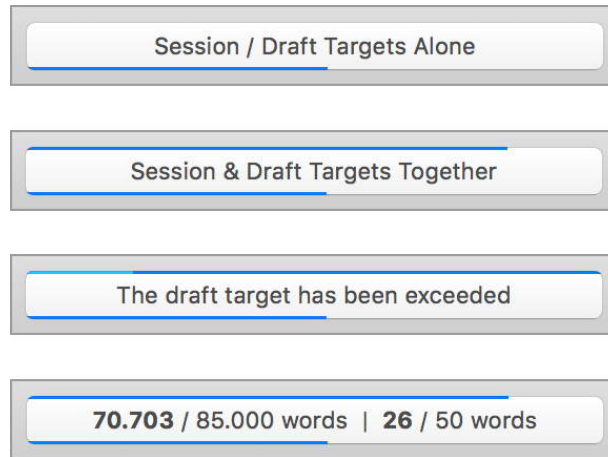
Searching isn’t solely about reading or editing things. Often we search with the intention of doing something with the things we find. Every entry in the search result list can be dragged and dropped, producing an identical result as dragging from the binder itself would. They are, like all other icons in Scrivener, full proxies for the items they represent ([subsection 12.1.1](#)).

## 11.5.3 Project Targets and the Quick Search Tool

Searching aside, this tool also serves as a convenient means of tracking progress toward set Draft or session goals. To get started with goals, hold down the **Option** key on your keyboard and click in the Quick Search tool itself. This will bring up the Project Targets panel ([subsection 20.1.1](#)), where you can edit your goals and change options on how those goals should be met.

The progress bars function in two different modes, depicted in the first two examples in [Figure 11.6](#):

1. If only a draft target or session target alone has been set, the progress toward that target will be displayed as a progress bar along the bottom of the Quick Search tool.



**Figure 11.6** The various ways progress can be monitored via Quick Search.

2. If both a draft target and session target are the draft target will be displayed along the top with the session target using the bottom track.

As shown in the third example, when you've opted to show a draft overrun, and have written in excess of your goal, a teal progress bar will creep up on the left showing how far over you are.

Lastly, you can hover over the tool with the mouse to print a numerical read-out. Leave the mouse there while typing to keep this information available.

### 11.5.4 Quick Search without a Toolbar

If you do not prefer using application toolbars, or maybe you just don't want this particular function on the toolbar, the Quick Search tool remains accessible: the shortcut that will ordinarily move the cursor to the field will instead create a pop-up search field.

Taking action on a search result will automatically dismiss the Quick Search tool. If you're thinking this all works a bit like Spotlight, you wouldn't be wrong in that assessment!

To close the tool without doing anything with it, either press **Esc** (potentially twice, after first clearing any typed in text) or **⌘ W** to close it immediately. The latter will save your search text for future use.

### 11.5.5 Quick Search Settings

There are a few settings that adjust how project target tracking works in this tool, located in the Appearance: Target Progress Bars settings pane ([subsection B.5.15](#)):

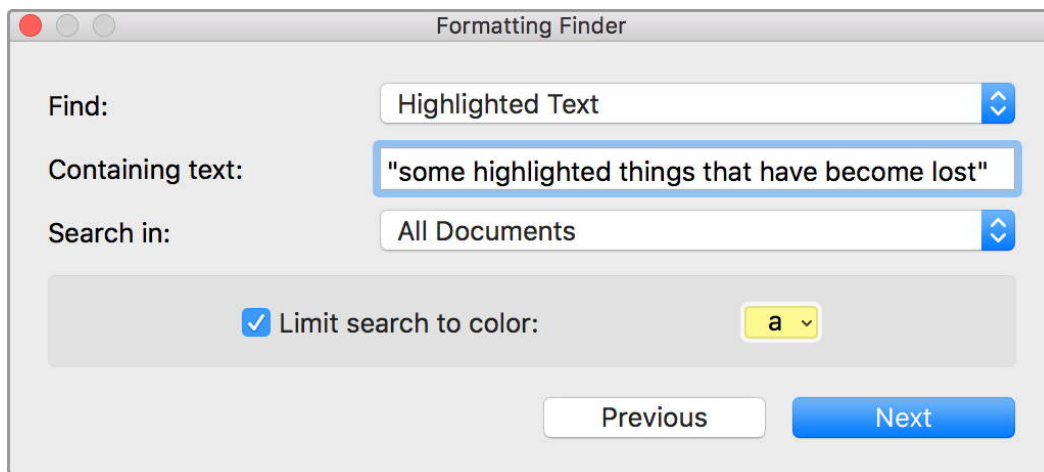
- If you'd rather not be distracted by progress bars while writing, but still wish to make use of goals, you can disable feedback by disabling the **Show progress bars in Quick Search toolbar item** option.

- The default colours are designed to fit in with the rest of the system. If you would prefer they use the colours other progress bars do in the software, then set **Use custom colors in toolbar progress bars**.
- The colours themselves can be changed in the “Colors” tab of this settings pane. This impacts all progress tracking bars in the software.

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## 11.6 Find by Formatting Tool

The “Find by Formatting” utility can be invoked from **Edit ▶ Find ▶ Find by Formatting...** (^⌘⌘F). It gathers together a number of powerful project-wide search tools for otherwise difficult to locate things, such as inline images by name; cross-reference links; text by style; inline annotations & footnotes; and so on. The anatomy of the tool is quite simple, let’s take a look ([Figure 11.7](#)):



**Figure 11.7** Find by Formatting: for finding stuff other than text.

The **Find** dropdown at the very top is where you select the type of thing you are hunting down, such as pictures, footnotes or revision tracking markup (to mention a few). The following two controls below are universal to each search mode:

- **Containing text:** narrows down the search to match results with the specified text. In the provided example, we would only find the phrase typed into the field if it were highlighted in yellow.

The type of search used here will always be “exact phrase”.

- **Search in:** there are two choices available: “All Documents” will search all text documents in the binder (even outside of the Draft), starting from the current point in the active editor. “Current Editor” will constrain the search to only text found within the active editor. In both cases, search will

automatically wrap around to the top or bottom of the document/binder once you've reached the last result in the current search direction.

### Taking a While to Find Stuff?

If you have the **Search in** mode set to “All Documents” and are searching within a large project, it may take a while for Scrivener to locate results, especially if the results are located far apart. There is no search index for things like bold text, so the software has to manually trawl through the text to find matching conditions. If you know the general area where you'd like to search, such as one chapter of your book, it would be best to use Scrivenings mode to view that section of text, and set the **Search in** mode to “Current Editor”.

As with the standard text find panel, it can be left floating over the project window as you click the **Next** and **Previous** buttons, so you can edit immediately after coming across a match, and then going back to search without having to call up the palette again. Also like the standard text searching it can run in “background mode” as well. Once a search criteria has been set up, you can close the window and use the following commands to step through results without the panel getting in the way:

- **Edit ▸ Find ▸ Find Next Formatting** (⇧⌘⌘ G)
- **Edit ▸ Find ▸ Find Previous Formatting** (⇧⌘⌘ G)

The rest of the panel, in the shaded grey area, will change depending upon the current **Find** mode. We'll now go over what each the search types do, and their special options.

## 11.6.1 Highlighted Text

Looks for text that has been highlighted using the highlight feature ([section 18.5](#)).

**Limit search to color** When the checkbox is enabled, only those highlights matching the chosen colour will be found. If this is disabled, all highlight colours will be considered a match. Note that the colour must be *precisely* the same, so it is often best to stick to using basic or custom swatches or the built-in highlighter defaults when using this tool.

To select a colour, right-click on the colour chip to select from Scrivener's standard stock colours, or left click to open the colour chooser directly.

## 11.6.2 Comments & Footnotes

Search within any inspector-based comments or footnotes in the project. By default both will be considered for potential matches, but you can narrow this down by selecting one of Comments or Footnotes from the **Type** menu.

## 11.6.3 Inline Annotations and Footnotes

Searching for inline annotations gives you three colour matching options:

- **Any Color:** No limits will be made on the search results.
- **Limit Search to Color:** will only find annotations of precisely the specified colour.
- **Exclude Color from Search:** any annotations precisely matching the provided colour will be excluded from the search.

(Inline footnotes have no additional options.)

## 11.6.4 Revision Colour

This tool will search by a particular revision level, selected from the dropdown menu, matching those used by the **Format ▶ Revision Mode ▶** submenu while editing. Since these colours can be changed in the Editing: Revisions Setting tab, inconsistencies between stored markings and current settings can result if collaborators are not using the same Settings, or if you change these settings mid-way through a project. If you intend to make use of Revisions in general it will be a good idea to establish a standard before embarking on a major editing effort.

This feature will step through any edits that have been made while using a particular revision level, including any overstrikes that have been made.

### Upgrading from Scrivener 2

By the same token, if upon upgrading an older project to Scrivener 3's format you find this tool no longer locates older revision markings, that'll be because the default colours have been very slightly changed. Further instructions for rectifying this are provided in *The Devil in the Details* ([section F.9](#)), under "Modified Default Revisions Colours".

## 11.6.5 Colored Text

The interface for this type of search is similar to the highlight search type. You can provide a custom colour restriction in the additional criteria section. The colour choice needs to be precise, so using custom swatches or built-in presets will generally be easiest. As with the highlight tool, right-click on the colour chip to select from Scrivener's standard stock colours, or left click to open the colour chooser directly.

### 11.6.6 Style

The stylesheet for the current project will be presented in the **Style Name** dropdown. If you wish to search only within block quotes, code blocks or headings, this is where you would do so. This tool will mainly be of use if you want to walk through style usage throughout the project, or hunt down specific text found within a specific style. There are additional search capabilities if you're mainly interested in selecting or finding all text assigned to a specific style. Refer to [Selecting and Searching for Styles \(subsection 17.4.1\)](#) for more information.

### 11.6.7 Character Format

Common direct formatting can be searched for using this tool. Any number of options in the additional criteria can be stipulated. They work in an additive fashion, so if you have both bold and underline selected, a successful match must be *both* bold and underlined. **Keep with next** search for paragraphs that have hidden the **Format ▶ Paragraph ▶ Keep With Next** marker added.

### 11.6.8 Links

You may search for hyperlinks of any sort using this tool. By default all links will be matched, but if you wish to narrow the search down, use the **Link type** dropdown. The “Web/File Link” will in fact locate *all* links<sup>3</sup>, save for internal document links.

When using “All Links” or “Web/File Link” as your link type, the **Containing text** field will search not only for the visible hyperlink text you can see in the editor, but within the stored URL as well.

When using the “Document link” link type, the **Replace with Title** button can be used to replace the visible text of the link with the Binder title of the item it points to. This can be useful for updating cross-references in your draft, if you know the underlying name of the item has changed.<sup>4</sup>

### 11.6.9 Images

Inline images in text files will be found by this tool. This includes fully embedded graphics that have been pasted or inserted into the file, as well as images that have been linked to files on the disk, via the **Insert ▶ Image Linked to File...** menu command, or images linked to binder files via **Insert ▶ Image Linked to Document**. This will *not* find images referenced with a placeholder—given that placeholders are simple text, you can use the regular text searching tools to locate these.

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<sup>3</sup> Such as mail, ftp, protocol links to other software (or other Scrivener projects) and so on.

<sup>4</sup> This can also be accomplished with the **Edit ▶ Update Links to Use Target Titles** menu command at any time, even by right-clicking on a link in the editor.



In this mode, the **Containing text** field will be renamed to **Name contains text**, and the text you enter here will be used to look for the name of the image, whether that be its filename on the disk, its name if fully embedded (double-click on an image in the editor to view or edit its name) or the binder titles of the images when linked in that fashion.

### 11.6.10 Tables

Tables inserted into text documents will be found with this tool. Matching text contained within any cell of the table will cause it to be found. In all cases the entire table will be selected.

### 11.6.11 Preserved Formatting Text

This will find text which has been marked as “Preserve Formatting”, via the **Format ▶ Preserve Formatting** command.

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## 11.7 Regular Expressions

Regular expressions are an advanced search syntax that can also be used to make complex replacements. If you know what they are, you are probably delighted to hear we support them. If you don't, we could not even begin to document this search syntax; entire books even larger than this user manual have been written on the topic! If you would like to learn how to use them, there are plenty of recipes, learning resources and tutorials on the Web, as well as those aforementioned books.

Regular expression support is provided in the following locations:

- *Project Search*: select “RegEx” from the operator section of the magnifying glass icon menu.
- *Project Replace*: using **Edit ▶ Find ▶ Project Replace...**, enable regular expressions by selecting “Regular Expressions (RegEx)” from the dropdown menu containing search modes.
- *Find*: the standard **Edit ▶ Find ▶ Find...** text searching tool supports them. Select “Regular Expressions (RegEx)” from the dropdown menu at the top of the “Find Options” section.
- *Outliner & Corkboard filtering*: when invoking **Edit ▶ Find ▶ Find...** from an outliner or corkboard view, click the magnifying glass and select “Use Regular Expressions (RegEx)”.
- *Compile replacements*: RegEx can be used in compile-time replacements, which alter the output without changing the original text.

Scrivener uses the stock RegEx engine supplied by the Mac, which uses the UTF-8 compatible [ICU guidelines](#). ICU is mostly compatible with [PCRE](#), which is considered to be the standard for extended regular expression syntax.

When used for replacing text in the compile pane, document find panel or project replace, you will need to address stored variables using the dollarsign-numeral syntax, such as \$1 for the first stored variable, \$2 for the second and so forth.

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# **Project Navigation**

12

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Moving around within a large project is an important part of writing efficiently, and especially in an application like Scrivener where cutting your work up into many small pieces is second nature. It's such an important aspect of the software, we have an entire top level menu devoted to navigation ([section A.7](#)).

An average book might have anywhere between several dozen, to hundreds or even thousands of sections arranged into many levels of groups in the Draft folder alone, and that's not counting any research you may have added to the project. We will cover how flexible the project window is, both as an adaptive tool that can be shaped to your current task, and as a way of building more static workflows (like a 3-pane browser, common to mail clients). Along with the binder, there are two primary tools for making sense of all of these pieces: the outliner ([section 8.3](#)) and the corkboard ([section 8.2](#)).

In this chapter we will concentrate on how to use these tools, the binder and other navigational tools to, as we say, see the forest *or* the trees.

## 12.1 General Navigation

Some navigation features are common to both the corkboard and the outliner:

- Double-click on any icon (to the left of the title itself) to load that document in the current editor. This process is sometimes referred to as “drilling down” into the outline.
- Alternatively, use the **Spacebar** or the **⌘O** shortcut to load the selected items in the current editor. When more than one item is selected, the effect will be to isolate them from their context, as a flat list. This latter usage is quite useful when you have a large group of items, but only wish to work with a selection, non-linear or otherwise, of those items.
- **⇧⌘O** loads the selected item(s) in the opposing split, opening a new one if necessary. This command can also be used from the binder, when you wish to target the split that clicking in the binder wouldn’t otherwise impact.

The following command can be used from any group view mode (including Scrivenings) as well as the binder sidebar:

- Unlike most other forms of navigation, the **Navigate ▶ Go To ▶ Selection** command (**⌘4**) will always load the selected item as a single document in the active editor, even if the selection is a container. This can be useful if you like to jot down notes into a folder’s text area. Since this command will disregard the usual view mode preference (such as viewing containers as a corkboard) it also has no impact on that preference. Use of it will not cause containers to load as single documents in the future.

When used in a Scrivenings session, the effect is to “isolate” the text your cursor or selection is currently within, allowing you to focus on that one section alone.

These commands can be used from within the editor in all contexts:

- Sometimes you may want to go “up” a level of hierarchy, to the enclosing group of the selection—instead of “down” (or deeper in the nesting order), as all of the above commands do—and for those cases, use **Navigate ▶ Go To ▶ Enclosing Group** (**⇧⌘R**). Viewing the enclosing group will also select the currently viewed item. For example, if you have a folder in your corkboard called “Chapter 10”, and that folder is nested beneath the Draft folder, then using this command will select the Draft folder in the editor, with “Chapter 10” selected within it.

When used in a Scrivenings session, the effect is to broaden the current text content to include a larger section of the work.

- The **Navigate ▶ Go To ▶ Previous Document** and **Next Document** commands (`⌘↑` & `⌘↓` respectively) will walk through the order of items as listed in the binder sidebar from the current vantage point. This form of navigation is also available as buttons on the editor header bar itself, on the right-hand side beside the split button, as up and down arrows. The contextual distinction here is key: if the sidebar is showing search results, then these buttons will walk through that list of items. If the binder itself is showing, the result will be to move through the binder stack one by one. If the item you are viewing in the editor is *not* listed in the sidebar then this form of navigation will be disabled as there would be no way to get from the current point to any frame of reference within the sidebar list.

Within a Scrivenings session these commands will jump from one section to the next within the session until you get to the end of the session in either direction.

### 12.1.1 Header Bar Drag and Drop

As mentioned before, Scrivener has extensive support for the concept of drag and drop. There are many areas where you can drag icons from and nearly just as many that you can drag *to*. The header bars on the editor splits are one such target, and they have two basic modes of usage:

1. Dropping binder items: in this case the items (if plural, it will form a multiple selection) are loaded in the editor, much as though you had selected or clicked on them in the binder.
  - When holding down the **Option** key the action will be to load the item (no plurality in this case!) into the editor's copyholder ([subsection 8.1.5](#)).
  - You can also drag an item directly to an existing copyholder's smaller header bar.
  - This action will not break the locked condition of an editor.
2. Dropping snapshots: when dragged from either the inspector or the snapshots manager the action will be to load the snapshot as a read-only copy in the main editor. Read more about these capabilities in [Using Snapshots \(section 15.8\)](#).

Here are a few ideas for how this capability can be used:

- If your **Navigate ▶ Binder Affects ▶** settings are such that the editor you wish to load an item in does not receive binder clicks, you can use drag and drop to manually load the document anyway.

- From the Bookmarks Tab ([section 13.4](#)) of the inspector. You can also right-click on a bookmark and choose to load it in either editor.<sup>1</sup>
- From a Quick Reference header bar. If you’ve had a document open in a separate window but wish to “dock” it into the main project window, drag the header bar icon from the Quick Reference panel into a header bar to load it there.

### 12.1.2 Go To Menu

The **Navigate ▶ Go To ▶** submenu can at times be a handy substitute for other methods, particularly in cases where the binder is hidden, or if the item you wish to navigate to is bookmarked ([section 10.3](#)) for quick access. The Go To menu always takes action on the active split, even when it has been locked.

The “Collections” entry within the Go To submenu will navigate the *main editor* to a collection list, rather than showing it in the sidebar as would be traditionally done. Viewing collections in the editors brings all of their organisational and visualisation prowess to bear upon them.

There are three locations where this menu appears:

1. The main application menu: **Navigate ▶ Go To**.
2. From the editor header bar icon menu, as “Go To Document”.
3. In composition mode, the Go To menu is available as a button in the control strip along the bottom of the screen. This form has a special behaviour when using Scrivenings mode in that it will only show items from the current editing session rather than the entire binder.

In all cases, both containers (represented as submenus in this context) and items can be selected. When a group is selected, it will be loaded with the current view mode. When the command is used from contexts that can only display text, such as copyholders and composition mode then the text editor for that container itself will be shown instead (and may be empty).

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## 12.2 Controlling Sidebar and Editor Integration

With few exceptions, whatever you click on in the binder sidebar will be automatically loaded into the active editor. This can become more complicated

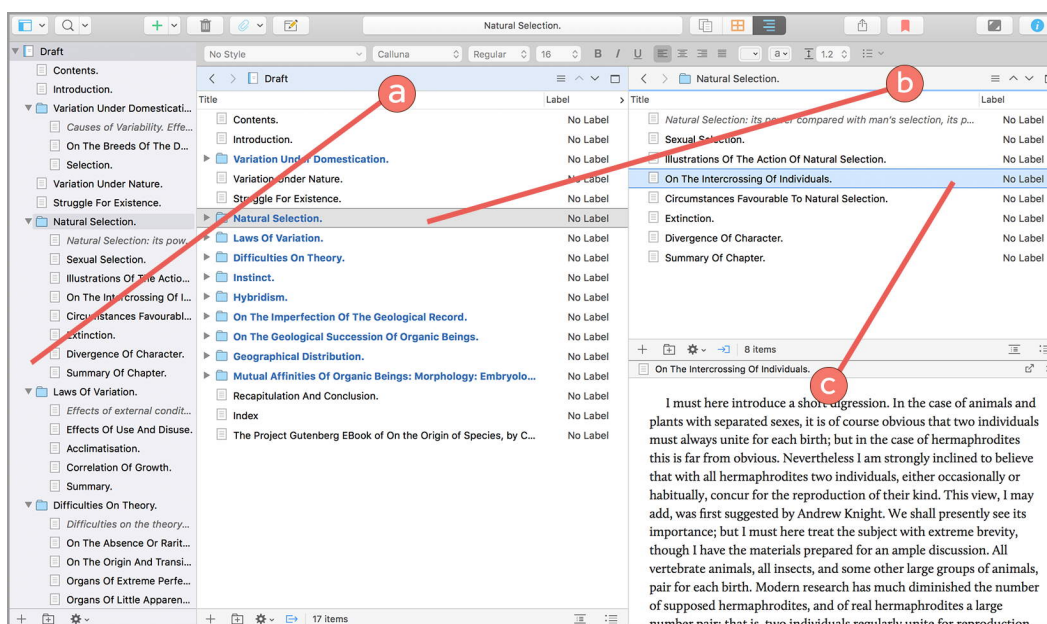
---

<sup>1</sup> If you would prefer bookmarks always load in one of the editors instead of a separate window, tune the **Open Inspector bookmarks in...** setting, in the Behaviors: Document Links settings pane ([subsection B.4.2](#)).



when there is more than one editor split in use. Occasionally you'll want to load things in another split so as to not disturb your current environment. Or you may even want everything to load in the other editor as a matter of course, no matter which editor is currently active. You may also want the binder to be completely decoupled from the editors so that all changes to what you are editing becomes a manual process.

This section will go over the sorts of adjustments you can make to change how the project window works in a persistent fashion, as well as showing you a few one-off tricks you can use to make use of additional splits without a whole lot of clicking around.



**Figure 12.1** A complex demonstration synthesising the techniques in this section.

Taking a look at [Figure 12.1](#) we can see a combination of different features being used together to create a workflow that emulates how some 3-pane software works in principle, with an additional twist that most cannot do. If you would like to play with this example yourself while following along, you will find this project in the Extras Pack ([Appendix G](#)), as “3-complex\_layouts.scriv”.<sup>2</sup>

- a) The first thing to note is that the left split header bar is accented, even though the active editor is indicated as being the right split. This means we have set up the binder to only affect the *left* editor when clicking on items within it. Our right editor will never be changed by what we do in the binder sidebar (this is accomplished by using the **Navigate ▶ Binder Selection**

<sup>2</sup> Do not be concerned if all of the files are empty save for the letter ‘a’, this is meant mainly to demonstrate the UI setup, not to provide a copy of the entire book!

**Affects ▶ Left Editor Only** menu toggle. At the bottom of the left editor is a blue button indicating that whatever we click on in the left editor will automatically load into the right editor—in other words it will act a little bit like the binder does.

- b) The accented underscore in the right editor's header bar indicates it is the *active split*. It is where we are working—where our cursor keys will move the selection highlight bar and so forth. It is viewing a folder that was clicked in the left editor split. At the bottom of this split you'll find that a blue button again, only this time it is indicating that whatever we click on in the right editor will be automatically loaded in the copyholder below it.
- c) Finally we get to the copyholder, or some actual text in this example. The right half of the project window acts a bit like a mini-browser of its own. You can create and work with items in the upper half and then edit the text of them in the lower half.

Naturally not every project will require all of these features to be enabled at once, but now that you've seen a little of Scrivener's flexibility in what it *can* do, you might have a few ideas for how you can use bits and pieces of this example in your own work.

Now that we've summarised the strategy, let's get into all of tactics that can be used to achieve it.

#### See Also...

- Splitting the Editor ([subsection 8.1.4](#)): much of what we'll be talking about in this section will only be beneficial if you're working with split views.
- The Active Editor and Targeted Editor in Split Views ([section 8.1.1](#)): for more information on how the editors signal their integration with the binder.
- Selecting Items ([subsection 6.3.2](#)): the basics on how the binder works with the editors in general.

### 12.2.1 Locking the Editor

A tool that can save you a lot of time, and solve a lot of arbitrary “how do I do this...” type questions is knowing how to essentially *turn off* project navigation. The editor—or each side, when split—can be locked with the **Navigate ▶ Editor ▶ Lock in Place** menu command (**⌘L**)<sup>3</sup>. The header bar for the editor will be changed to a dark grey (or lighter grey, in Dark Mode) and will have a lock icon added to the right hand side. Whenever you take an action that would ordi-

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<sup>3</sup> This feature can also be accessed from the header bar contextual menu ([section 8.1.1](#)).

narily have loaded content into that editor, the request will instead be diverted to the other editor, unless it is also locked, or the request originated from it.

### Upgrading from Scrivener 2

In previous versions of Scrivener, locking the editor had the effect of keeping all navigation inert so long as that split was active, rather than always diverting navigation to an available unlocked split instead. If you would prefer the older behaviour, set the **When focused editor is locked in place** to “Binder selection does nothing”, in the Behaviors: Navigation settings pane.

Locking the editor inhibits *external navigation* from impacting the locked editor. This makes it easy to keep your editing session stable while using other tools.

What locking will not do is prohibit actions taken from *within the editor* itself, or those we might consider desired actions. This includes use of editor navigation functions (such as history), manually dragging items to the header bar, hyperlink usage<sup>4</sup> or menu navigation commands. Locking is meant primarily to keep the interface from taking actions that the software would ordinarily take automatically. Locking will not inhibit intentional actions that *you* make. These actions will navigate as requested and cancel the lock state in doing so.<sup>5</sup>

An exception to the typical lock behaviour is when it makes sense to scroll your view, or select items within it, based on an external selection that otherwise would impact the editor. If when using a locked group view you click on a portion of the outline that is contained within that view, then the editor will scroll to the right spot and select that item. For example, in a large locked corkboard, you can jump to individual cards by clicking on them in the binder, or jump to sections of your text in a Scrivenings session. This behaviour leaves the lock intact, so if you later click on something else outside of the view nothing will happen.

## 12.2.2 Locking the Group View Mode

Under normal conditions, the view mode used when selecting a group of items is determined by the last view mode you used ([subsection 4.2.1](#)). In most cases this works quite well as we tend to do tasks in bunches. Sometimes however, you might wish to designate a certain container as always being shown using a particular view mode, no matter what the current preferred view mode may be.

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<sup>4</sup> When links are set to load in the current editor, in the Behaviors: Document Links settings pane ([subsection B.4.2](#)).

<sup>5</sup> The one exception to this rule of thumb is when manually loading bookmarks into the locked pane; this will be blocked as though it were a single click action.



**Figure 12.2** The lock icon indicates the container you are viewing has been locked to the outliner group view mode.

To set a container (defined as a folder, file group or collection) to use a particular view mode, use the **Navigate ▶ Editor ▶ Lock Group View Mode** menu command on the active editor you wish to freeze.<sup>6</sup> If the toolbar is visible, you'll see a small lock badge added to the associated view button in the toolbar (Figure 12.2). So long as the view mode is locked, changing the view mode while viewing the container will modify which view mode it should use in the future.

Here is an example of how this feature might work:

1. A folder (A) is set to have its group view mode locked to corkboard mode.
2. Another folder (B) is clicked on, and the view mode changed to outliner.
3. When switching back to folder A, the view mode returns to corkboard.
4. Viewing folder B, or any other unlocked folder in the binder, will return to outliner mode.
5. Now if folder A is viewed again and changed to Scrivenings, folder B (and the rest of the project) will use Scrivenings mode as per normal. Additionally, this action will *also* lock the selected view mode to folder A. It will now use Scrivenings mode by preference instead of the corkboard.

There is no limit to the number of containers that can be locked to a view mode in a project. The setting is unique to that container and does not impact anything else.

#### Locking the Group View is a Persistent Setting

If a container is duplicated, its settings will be carried along to the duplicate. For example if the setting is applied to a document template (section 7.5), then each new instance created using that template will also bear that setting. However from that point on these new containers will maintain their own settings; changing one will not impact the others that came from it, or vice versa.

### 12.2.3 Adjusting What the Binder Affects

Earlier we spoke of adjusting whether the binder should interact with a particular split or leave it alone. Let's take a look at two different ways of doing that—

<sup>6</sup> This command is also available from the header bar contextual menu (section 8.1.1).

one for quick one-offs and another for persistently altering how the binder interacts with splits.

## When Loading Items

Holding down the **Option** key when clicking will cause the item to be loaded in the other split, opening one if necessary. Here are the contexts and methods this blends with:

- Clicking on individual items in the binder.
- Combined with modifier keys to add or remove from Multiple Selections ([section 6.4](#)) in the other split. **⌘Click** will add or remove the item you clicked on to the other split's group view (forming a group if currently only one item is showing). **⇧Click** adds ranges of items to the other editor, as you would expect.
- When clicking on items in the Project Bookmarks panel ([subsection 10.3.1](#)).
- Clicking on, or when pressing **Option-Return** to load items from the Quick Search Tool ([section 11.5](#)).

Use of these methods to load items in the inactive split will not activate the other split. You can thus load supporting material with a single click and then keep typing as you were.

## Changing How the Binder Works Persistently

By default the active split is synonymous with the targeted split. If you click in the top editor the header bar is shaded with an accent colour and is underlined likewise. You wouldn't be blamed for thinking that was one visual effect, but in fact it is two. The accent shade indicates the binder will load things into that editor when you click on them (targeted), and the underscore indicates that this is the split you're currently working within (active). If we can tell the binder to only target one split but can still of course easily work in either, then there will be times when the underscore is on the *grey* split, not the accented one ([Figure 8.2](#)).

The **Navigate ▶ Binder Selection Affects ▶** submenu is how you will get to the point of seeing such variations in the first place. If you still have that sample project handy from earlier in this section, you might want to play with each option to see how they work:

- *Current Editor*: This is the default behaviour out of the box. Whichever split you clicked in last will be targeted.
- *Other Editor*: Whichever split is *not* currently active will be targeted. This way your current work space is never disturbed by usage of the binder.
- *Top|Left Editor Only*: The top or left split (depending upon orientation) will always take binder clicks no matter which split is active.

- *Bottom|Right Editor Only*: The bottom or right split (depending upon orientation) will always take binder clicks no matter which split is active.
- *Both Editors*: In this special case, *both* editors will update whenever you click on something in the binder. This will most often be useful when using two different group view modes. You could have an outliner in the left view and a Scrivenings session in the right, both showing the same area of the binder in their own unique ways.
- *None*: Neither editor will update when using the binder. In this mode of usage, you will always need to manually open items into an editor. This can be done by using the Open commands in the right-click menu or **Navigate** menu, or by drag and drop into the header bar.

### 12.2.4 Making Splits Load by Type

If you would like to use the split views to achieve a stricter form of navigation, where groups of items always load in one side and text content on the other, the **Navigate ▶ Binder Selection Affects ▶ Open Non-Group Items in Other** menu toggle may achieve what you are looking for.<sup>7</sup>

A good practical demonstration of how this feature is intended to work is provided with the Three-pane built-in layouts (section E.2). When the **Navigate ▶ Outliner|Corkboard Selection Affects ▶ Other Editor** menu toggle is enabled this feature will work together with it in a way unlike how “Binder Affects” and “Outliner/Corkboard Affects” would typically work by themselves, even if you have them both enabled. When clicking on a group in the binder, two things will happen:

- The group will be loaded into the split the binder affects, displayed using whatever view mode you are using in that split.
- If the affected split is displayed as a corkboard or outliner, then the *other* split will automatically load whatever you were working on last within that group. For example if you click on a folder called “Geographical Distribution” and then within that folder click on a subdocument called “Summary”, loading the text of that file into the other editor, when you next load “Geographical Distribution” from the binder, “Summary” will automatically load in the other split as well.

It’s worth noting that this secondary behaviour may in fact load a group into the other split, if the last thing you clicked on in “Geographical Distribution” was a subgroup.

---

<sup>7</sup> The definition of “other editor” in this case will always be the split *not* affected by the settings in this menu, and the label of the menu command itself will change to reflect that. When both editors are targeted by the binder, the right or bottom split is always considered the other editor.



### I'm Still Getting Groups in the Other Split

This setting is very specific: it only impacts what happens when non-group items are clicked in the binder sidebar. If you load a group through some other means (say a bookmark, or by clicking on a group in the navigation split) then Scrivener will dutifully load that group in the content split. This isn't a way of forcing the editor to never load groups, or forcing a split to never load text, but a way of directing how simple clicks in the binder tend to favour that approach. No other method of navigation, be it history, hyperlink navigation or what have you, will trigger this behaviour.

## 12.2.5 Linking Splits Together

In addition to tuning how the binder sidebar works with splits, you can also adjust how splits work together, or with attached copyholders within either split.



**Figure 12.3** The “auto-load” button, in the editor footer bar, is accented when activated.

Both corkboard and outliner views have an auto-load feature that when enabled, will load any selected item(s) in the other split or the editor's copyholder, much like when clicking on an item in the binder. These modes can be swapped between by clicking on the indicator in the footer bar, at the bottom of the editor, or via the menu commands listed below. There are three modes of operation, two of which are illustrated in [Figure 12.3](#). The following menu commands can all be found in the **Navigate ▶ Outliner|Corkboard Selection Affects ▶** submenu:

1. When the editor has a copyholder attached to it, clicking this button will enable the auto-load into copyholder feature, and the icon will look like the top example. You can think of it as “sending” to the other side of the editor window. This can be enabled with the **Copyholder** command.
2. When the editor is split, then clicking the button enables auto-load in other editor mode. The icon in that case looks like the bottom example, depicting the action as “sending” out of the current editor split. This can be enabled with the **Other Editor** command.
3. When disabled, the button will be drawn in grey to indicate it is inactive. You can directly disable the setting with the **None** command.

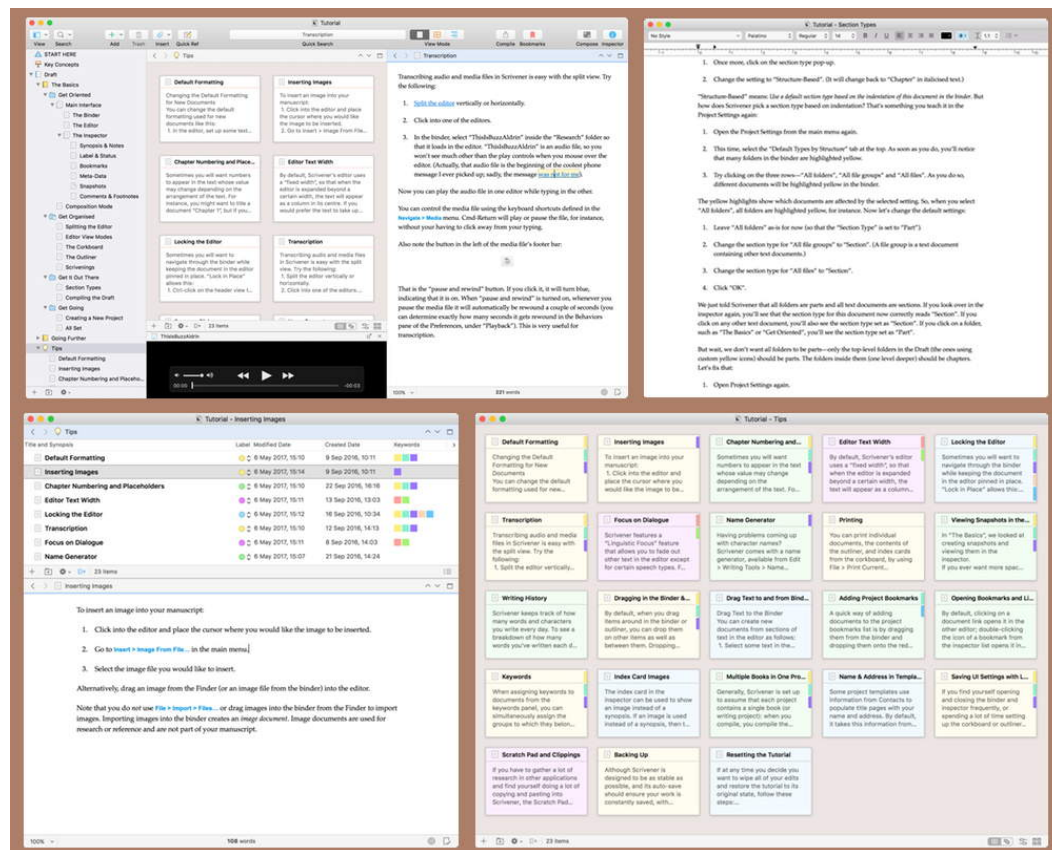


If the editor is split *and* the current editor has a copyholder then clicking on this button will rotate between all three modes. When neither copyholder nor splits are available this feature does nothing, even if it has been activated in the past. It will wait passively until the right conditions exist.

If you have a keyboard with a Touch Bar and your context is currently within a corkboard or outliner view, then you will find a button on your keyboard that resembles the button in the footer bar. Use this to toggle auto-load modes directly.

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## 12.3 Saved Layouts



**Figure 12.4** Scrivener’s diversity and flexibility benefits from being able to save your workflows into Layouts.

In the course of using Scrivener, you may find that you shift how you use the project window, depending on what you are doing, or which phase of the project you are in. In the early stages of a project you might focus on a large corkboard without any other interface to get in the way. As structure starts to emerge, you may have the binder open with the corkboard in the top editor and text in

the bottom editor; whilst composing, you may have only the text open, with the binder, inspector and toolbar hidden. Or perhaps you switch between computers frequently, and like to use an expansive project window on your desktop monitor, but prefer a compact window on your laptop.

Or, maybe you'd *like* to do these things, but tend not to because you're put off by the amount of adjustment it would take to change the window around.

By saving the settings of the window for future recall, the Layouts feature makes rapidly switching between these workflows a cinch. Once you get things set up the way you like, you never have go through the process of hiding the binder, toggling the format bar, resizing the window and so forth. You can even indicate that display preferences, such as outliner column settings and whether or not labels tint index cards, are used by the layout.

### Upgrading from Scrivener 2

If you have legacy layouts saved from older versions of Scrivener, you will find they still exist in the list in the new version. You may try to use them, but we cannot guarantee that they will work properly. It would be safest to try and reproduce their settings by hand, and then update the layout with the new version of Scrivener.

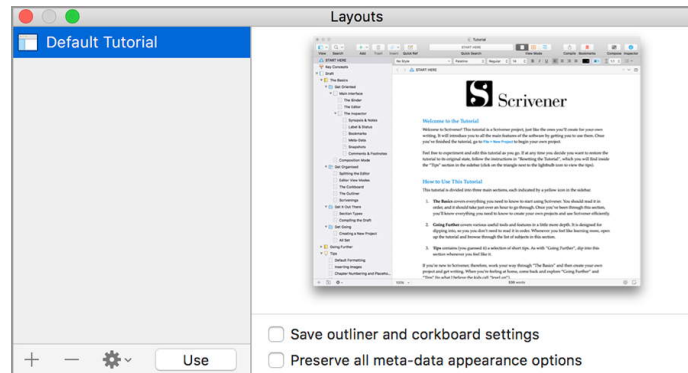
## 12.3.1 What Layouts Save

To clarify what may already be obvious: layouts are not a part of any particular project, and as such they will not save information specific to any one project, such as things like the collection you are using in the sidebar, whether any Quick Reference panels are open or which folder you are viewing as a corkboard in the editor (it will however save that a particular editor is using the corkboard view mode). Even within one individual project, these details might change or no longer be relevant as time goes by. Here is a list of things layouts *do* save:

- Window size and position and the sizes of elements within them, such as how wide the binder is or the ratio between the two splits.
- Binder, collection list and inspector visibility.
- Split type (horizontal/vertical/none).
- Corkboard (freeform & layout)/outliner/scrivenings/editor mode for each split, regardless of the currently selected content.
- Which split(s) the **Navigate ▶ Binder Selection Affects** option is set to.
- Whether **Navigate ▶ Corkboard|Outliner Selection Affects** the other editor or copyholder (but not the presence of a copyholder itself, as that is like Quick Reference panels a project-dependent piece of information).
- Header and footer bar visibility in either split.

- Whether editors are locked in place.
- Ruler and format bar visibility.
- Line numbering in the editors.
- Full Screen status.

## 12.3.2 Creating a New Layout



**Figure 12.5** Layouts panel with the interactive tutorial's window settings saved.

To get started, open the Layouts panel ([Figure 12.5](#)) with the **Window ▸ Layouts ▸ Manage Layouts...** menu command (⇧⌘L). If you do not have any layouts saved yet, you won't see much beyond some help text.

1. If you have more than one project open, make sure the project you wish to capture is the active window by clicking anywhere within it. Whether or not the project window is in Full Screen mode will be saved, so if you would rather not have that a part of your layout, be sure to leave Full Screen mode first.
2. Click the **+** button in the lower left corner of the panel.
3. Type in a meaningful name for the layout.

A screenshot of the window will also be taken and displayed on the right (you can update it later on if you don't quite like how it turned out).

At this point all of the important details of your project window settings have been saved. They can be recalled later at any time into any project window you wish to apply them to.

4. Select from either of the options listed below the thumbnail that you feel are relevant to the layout. These options are always saved into the layout—the checkboxes merely determine whether using the layout in the future will set these options to the project window. They can thus be freely tog-

gled at any time to produce a limited or expanded effect on the current project window, without changing the underlying layout.

**Save outliner and corkboard settings** All corkboard display settings, such as card size, ratio, card wrapping, and so on will be restored when using the layout. Additionally the corkboard modes for freeform and label view will be restored, and since this has the effect of setting these modes to the containers being viewed, use of a layout will modify the items at the time of application.

In the outliner, the layout will restore which columns are visible or hidden, along with their positioning and widths. Custom metadata columns will be restored if matching names are found within the project.

**Preserve all metadata appearance options** This will determine whether or not label tinting used in the various areas of the interface; and pin, stamp, and keyword chip visibility in the corkboard, will be restored when using the layout.

### 12.3.3 Switching Between Layouts

#### Need to get back to where you started?

Before you select a layout for your project window, it's important to know that when you apply one, you'll be overwriting all of its current display settings. Consequently if your current view settings are important, you might want to save them into their own layout first.

There are three ways to switch between layouts:

1. Use the **Window ▸ Layouts ▸** submenu and select the saved layout from the menu.
2. The “View” button in the main application toolbar ([Figure 4.2](#)) will list any available layouts at the bottom of the menu.

With both of these methods, if you hold down the **Option** key while selecting the layout, its Full Screen setting (whether on or off) will be ignored.

3. With the “Manage Layouts” panel ([Figure 12.5](#)), use one of the following methods:
  - Double-click the *icon* of the layout you wish to load.
  - Press the **Return** key on the selected layout.
  - Select the layout and click the **Use** button below the list of layouts.

### 12.3.4 Setting a Full Screen Default

It is possible to select a layout for use by all projects that are taken into Full Screen mode, as a kind of default layout for that way of working. This is a special behaviour that breaks some of the rules with regards to how project layout in general works:

- The designated Full Screen layout will be used when taking a project into Full Screen mode. When taking that project out of Full Screen mode (or even simply closing it), it will resume using its original layout settings. Thus the full screen layout will not be saved into the project's own display settings.
- Consequently, changes made to the layout of the project while in full screen mode will not be preserved upon return to standard multitasking. Everything will be precisely as you left it before entering full screen mode.
- Changes that fall under the auspices of metadata appearance and outliner/corkboard settings *will* on the other hand be preserved. For example if you take a project into full screen and then decide to tint index cards with label colour with **View ▸ Use Label Color In ▸ Index Cards**, then upon return to standard multitasking, index cards will remain tinted. On the other hand if you open up the tab stop ruler in Full Screen mode, it will be gone once you return.

### 12.3.5 Managing Layouts

All layout management is done within the “Manage Layouts” panel, which can be loaded with the **Window ▸ Layouts ▸ Manage Layouts...** menu command (⇧⌘L).

To remove a layout you no longer need, select the layout and click the — button along the bottom of the layout list on the left, or press **Delete** on your keyboard. You will be warned that once it is deleted you'll be unable to retrieve it. This warning can be dismissed so that it no longer appears, if you wish.

To update an existing layout using the current project window, select that layout in the list, and click on the ☹ button in the footer bar, choosing “Update Selected Layout”. A new screenshot will be taken and the old settings will be updated to reflect the current window layout.

Layouts can also be exported and installed into Scrivener<sup>8</sup>. For example you could share your layouts with others by posting them online, or download layouts and install them into your copy.

- *Exporting*: using the ☹ button, select the layout you wish to export, and then choose “Export Selected Layout”. The layout will be saved as a file in

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<sup>8</sup> It is not possible to share Layouts between Windows and Mac versions of Scrivener, owing to the many technical differences in how a window is set up.

the location you provide.

- *Importing*: use the “Import Layout” command to import a layout file (.scr-layout).

Layouts can be easily accessed on the disk as well. Use the **Scrivener ▶ Reveal Support Folder in Finder** menu command and drill down into the “Layouts” subfolder to find the .scrlayout files themselves.

### 12.3.6 The Built-In Layouts

Scrivener comes with several built-in layouts that demonstrate the various navigational features of the project window. Some are intentionally quite simple, designed to help you focus on a particular way of working, others gather a number of individual settings into more complex workflows that may not be obviously achieved.

Unlike regular layouts, these built-in layouts will in general not change your window size or position, unless the layout causes any main editor splits to become more narrow than your preferred editor width.<sup>9</sup>

Additionally, they will not change your underlying view settings in a permanent fashion. For example if you have a lot of columns added to the outliner and decide to make use of the “Three Pane (Outliner)” layout, which reduces the complexity of the outliner to a very simple browser, upon selecting one of the built-in layouts that leaves these settings alone (such as “Default”), you will find your original column settings intact. If however you added the label column to the outliner while using this layout, upon returning with “Default” you will find the outliner settings stick to the new setup you customised.

Since the built-in layouts cannot be modified they will not appear within the **Window ▶ Layouts ▶ Manage Layouts...** panel. They only appear in the main menu and under the “View” button in the application toolbar.

The individual layouts are fully documented in Stock Window Layouts ([Appendix E](#)).

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## 12.4 Viewing Only Compilable Items

One of the ways in which you can work in Scrivener is with interleaved notation among the very pieces of text that comprise your work in progress. This is a method that some prefer, as it keeps their notes and ideas immediately adjacent with the text that readers will see, and it supports a working method where notes

---

<sup>9</sup> Set in the Appearance: Main Editor: Options Setting tab ([subsection B.5.8](#)), with the **Default editor width** setting.



can be more extensive or elaborate than what is easily put into annotations or comments.

In Scrivener, you can place text documents right alongside the documents used to contain portions of your Draft, and then instruct these documents to not compile ([subsection 13.5.1](#))—in other words when you turn the Draft folder into one long file, these note files will be hidden from the exported material.

When viewing such a portion of the draft with Scrivenings view ([section 15.5](#)), you will see all of your notes and draft text together. But there will be times when you want to just see the compilable text that will become your book:

1. Select one or more containers to view.
2. Use the **Navigate ▶ Open ▶ With Compilable Subdocuments** menu item.<sup>10</sup>
3. The result of this action will be a flat multiple selection of items ([section 6.4](#)) that you can peruse using any view mode you prefer.

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## 12.5 Clearing Navigation Settings

If for any reason you wish to clear all of the settings that impact how clicking works in the project window, the **Navigate ▶ Clear All Navigation Options** command is a handy way to do so in one move. The following changes will be made:

- The **Navigate ▶ Binder Selection Affects** mode will be set to “Current Editor”, and the “Open Non-Group Items in Other” option disabled.
- The **Navigate ▶ Outliner Selection Affects** mode will be set to “None”.
- **Navigate ▶ Editor ▶ Lock in Place** will be disabled.
- Finally, the inspector will be unlocked from working with only one split (this happens as a secondary effect of closing split views).

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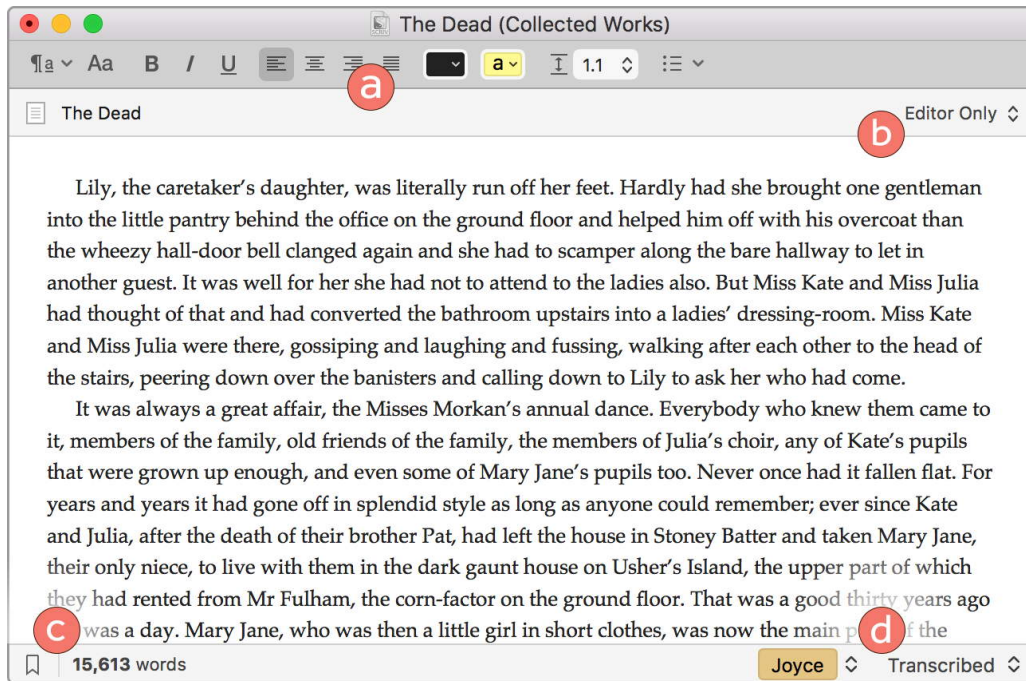
## 12.6 Quick Reference

If you’ve been looking for a way to load a document into its own window, this is the section for you. Quick Reference panels (sometimes shortened to “Quick Ref”) are simplified editors and media viewers, and you can have as many of them open as you want.

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<sup>10</sup> The name of this menu item will change depending on whether the **Include enclosing folder text in Scrivenings mode** checkbox is set, in the Behaviors: Folders & Files ([subsection B.4.5](#)) Setting tab.





**Figure 12.6** With Quick Reference, open bits of your project into separate windows featuring for editing or simple reference.

The panel itself is composed of four major parts (excepting the main editor/viewer in the middle), two of which are hidden by default.

- a) The format bar and header bar along the top provide basic formatting tools just like in the main project window; the header bar just below it supplies the identity of what we are viewing.
- b) Along the right-hand side of the header bar is a dropdown which reveals an inspector split when used. This split can be either vertically or horizontally oriented.
- c) The bookmark button reveals the Project Bookmarks sidebar, turning this window into a capable browser for your bookmarks. Refer to Working with Bookmarks in a Quick Reference Panel ([subsection 10.3.3](#)) for further detail. Document statistics and scripting hints (in script writing mode) will be displayed along the bottom.
- d) On the bottom-right you have quick access to the Label and Status meta-data fields, just like in the Inspector.

As for the thing in the middle of these points, the editor itself: this is a full-power text editor when viewing standard file or folder documents, and a standard media viewer just like the main editor when viewing PDFs, images, or mul-

timedia<sup>11</sup>. The main difference between a Quick Reference editor and those featured in the main project window is that it focusses on the content of one item. It is not capable of showing group views or Scrivenings sessions.

### 12.6.1 Opening an Item in Quick Reference

There are five easy ways to open a document in Quick Reference mode:

1. Select one or more documents in the binder sidebar, or from a Bookmark list, and tap the **Spacebar**. If more than one document is selected, multiple Quick Reference panels will be opened at once.

When selected from one of the editor views (including the text editor), use the **Navigate ▶ Open ▶ as Quick Reference** instead. You can also make it so **Spacebar** works in the corkboard and outliner with the **Space key opens selected documents in...** setting, in the Behaviors: Navigation settings pane.

2. Use the **Navigate ▶ Open Quick Reference ▶** from the main application menu to open a selected item from anywhere, without disturbing your existing workspace in the project window or having to leave composition mode. This will also open the currently edited chunk of text from the main editor. Each item in the binder will be organised into submenus based on the project hierarchy. If you select one of the groupings itself, the command will use that group. For example if you have a folder named “Chapter One” and have typed some notes into it, you could target that folder specifically with this command.
3. Use the “Look Up” trackpad gesture (three-finger tap, or Force Click) to open anything in a Quick Reference panel from a group view or the binder sidebar. This option requires the “Look up & data detectors” option in your System Settings: Trackpad pane to be enabled.<sup>12</sup>
4. When using the Quick Search tool (section 11.5), select a search result and press **⌘Return** to load the result as a Quick Reference, instead of into the main editor.
5. Drag and drop the item from any binder sidebar or group view mode onto the “Quick Ref” toolbar icon.

You may have noticed that Quick Reference windows are used in a few contexts within Scrivener automatically, such as when double-clicking on book-

<sup>11</sup> Unlike loading film and audio in a split, the remote pause and resume commands will not work in Quick Reference panes, as you can have many audio files open at once, and Scrivener would not know which one to work with.

<sup>12</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.



Figure 12.7

marks in the inspector, or clicking on hyperlinks in composition mode. Most of these behaviours can be modified in the Behaviors: Document Links settings pane ([subsection B.4.2](#)).

## 12.6.2 Quick Reference Window Settings

Each Quick Reference panel you open will remember the settings you’ve used within it, as well as the overall size of the window and split placement. If you left the inspector open and dragged it down to the shortest possible height, and you open that panel again in two years it will be just how you left it.

When you open a document in a Quick Reference panel for the first time ever, it will adopt the window size and position used from the last window you *changed*. It will not adopt inspector settings.

Once you have closed the window, for the remainder of your session with that project it will be remembered in the **Window ▶ Closed Panels ▶** submenu, much like a modern web browser might save all of the tabs you have recently closed. Feel free to close Quick Reference windows whenever you are immediately done with them, as they will remain easily accessible to you from that menu.

You can also choose to have panels reopened for you the next time you return to the project. Set **Reopen Quick Reference panels when opening projects** in the General: Startup settings pane.

## 12.6.3 The Elements of the Panel

### The Header Bar

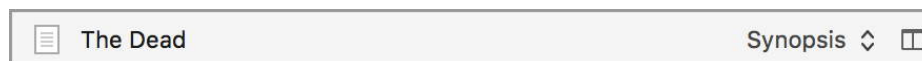


Figure 12.8 The Quick Reference header bar.

Along the top of the window, below the Format Bar if you have displayed it, you will find a simplified header bar ([Figure 12.8](#)).

The icon to the left of the title can be dragged, acting as a proxy for the file it represents. It can be dragged to the binder to move the file to the location you drop it, into a bookmarks inspector pane, etc. E.g. to “dock” a Quick Reference panel back into the project window as a copyholder, try holding down the **Option** key while dropping its icon onto an editor header bar.

As with the main header bar, this icon also has a contextual menu with a few features:

- *Reveal in Binder* (**⌘R**): displays the location of the file this window is viewing in the main project window's binder, opening it if necessary and unfolding any levels of hierarchy to do so.
- *Take Snapshot* (**⌘5**): take a quick snapshot of the document's text in its current state. You will not be able to view snapshots from within the Quick Ref window itself, but the **Documents** ▶ **Snapshots** ▶ **Snapshots Manager** tool can help with this, while keeping the main project window focused on other things.

As with the main editor header bars, you can edit the title of the document right here by clicking into the title text (or using the **⌘T** shortcut). Press **Return** to confirm and return your cursor to where it was in the editor previously. If left blank, the title will show a little of the synopsis card text as a placeholder title, or lacking that, the first few works from the top of the document itself. See *Titles and Adaptive Naming* ([section 7.2](#)) for more information on how that works.

Next along the top is a button for viewing information from the inspector. It will be labelled “Editor Only” by default, and that is the choice you would make to close the split when you are done with it. Read more about this feature in *Quick Reference Mini-Inspector* ([section 12.6.3](#)).

Finally, when a split has been opened (such as in our example, where we are viewing the Synopsis of the document), a final button will appear that flips the orientation of the inspector split.

## The Footer Bar

The footer bar, running along the bottom of the view, has three primary elements:

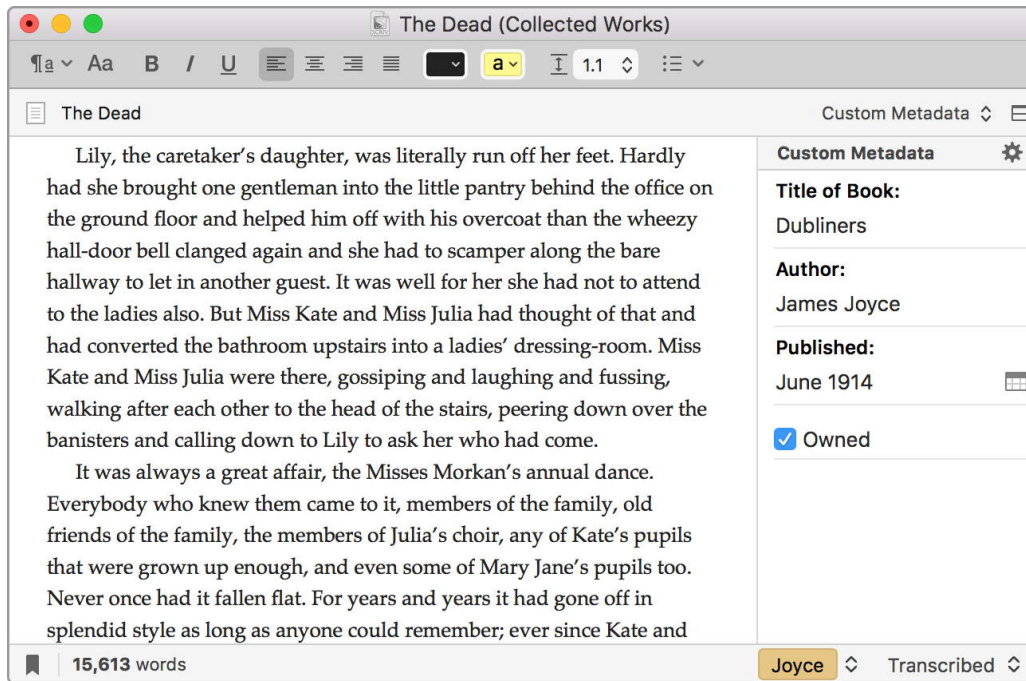
1. The “Project Bookmarks” button. This is described below ([section 12.6.3](#)).
2. This area will display either statistics or scripting element dropdown menu (which can be called up with the **⌘Y** shortcut, just as in the main editor), depending upon the editor mode.

When viewing a multimedia file, the “Pause and Rewind” toggle button ([section 8.1.3](#)) will be displayed.

3. Finally, along the right hand side are two dropdown menus for changing the label and status metadata fields, in that order.

## Quick Reference Mini-Inspector

Quick Reference panels can display inspector metadata for the document you are working with in the panel.



**Figure 12.9** A Quick Reference window can display a simplified inspector along the bottom or to the right (as shown).

The panes you can make use of here are not organised in precisely the same fashion as the inspector itself, on account of their being divided into specific areas of content. For example the “Notes” tab in the inspector is actually comprised of three different pieces of information, each of which has its own panel here. Available areas of content are as follows:

1. *Editor Only*: the default state, which removes the split and focusses purely on the content. (You can also use the standard shortcut for “No Split”, **⌘**’).
2. *Synopsis*: the text content of the index card
3. *Picture*: the graphical content of the index card, if applicable.
4. *Notes*: document notes, from the first tab of the inspector.
5. *Keywords*: document keywords; this table also serves as a drop-target for keyword drags from the Project Keywords window.
6. *Bookmarks*: the list of bookmarked items for this document. Double-click to load them in their own Quick Reference panel. Refer to the following section if you’re looking for project bookmarks.
7. *Custom Metadata*: the custom metadata fields in a linear list of editable text fields.
8. *Comments/Footnotes*: where you can view the various linked footnotes and comments within the text editor. This split will appear automatically if



you create a note.

Refer to the Inspector ([chapter 13](#)) itself for greater detail on how these particular tools are used.

The orientation of the split can be toggled between horizontal and vertical. The standard shortcuts for doing so, `⌘=` and `⌘"`, respectively, also apply here.

## The Bookmark Sidebar

Any Quick Reference window can easily browse through project bookmarks (assuming it can display the type of bookmark in question). Click the bookmark button, marked (c) in [Figure 12.6](#) to toggle sidebar visibility, or use the `⇧⌘B` shortcut. Click on the bookmarked document you wish to edit to view it in window.

For a detailed reference on the sidebar itself, refer to Working with Bookmarks in a Quick Reference Panel ([subsection 10.3.3](#)).

When using the bookmark sidebar, the earlier comments on Quick Ref windows remembering their size and split settings will be not be applicable on account of their being displayed in a collective browser, sharing a window size and settings with other documents.

## 12.6.4 Tips for Using Quick Reference Panels

### Floating Panels for Maximum Visibility

Quick Ref panels have an additional capability in the **Window ▶ Float Quick Reference Panels** menu toggle (`⇧⌘Q`). When set, all of a project's panels will “float” over all other windows in Scrivener. Floating can be particularly useful when the project window itself is as large as the entire screen, or in composition mode, where the backdrop would ordinarily hide the panels. Consider toggling float on and off as needed to bring the panel workspace to the front, and then disable it and with a click dismiss them all and return to the work you are focusing on.

### Displaying Research in Quick Reference

It's not just about the text. These windows can also act as capable PDF and image viewers, as well as working with other multimedia. For further information on the particulars of how they work inside the editor area, refer to Viewing Media in the Editor ([subsection 8.1.3](#)).

The **Window ▶ Zoom** menu command, when use on a Quick Reference panel that is viewing an image or PDF will expand or contract the size of the window to fit the content. If you would prefer things work the other way around, double-click on the image and click the **Scale to fit** option. With PDFs you can right-click on the PDF and select “Automatically Resize”, or select the same from the **View ▶ PDF Display ▶** submenu.

## Setting Text Zoom

Although there is no place for the visible zoom control like in the main editor footer bar, you can independently zoom the text scale within each Quick Reference panel as needed, using the **View ▶ Zoom ▶** submenu, or the **⌘ >** and **⌘ <** shortcuts to decrease and increase the magnification levels, respectively.

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| **Inspector**

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The Inspector is an optional sidebar on the right-hand side of the project window that displays all metadata, snapshots, cross-references, notes, compile settings and other sundry associated with the selected binder item.

You can toggle whether the Inspector is visible with the **View ▶ Show|Hide Inspector** menu command (⌘⇧I), or by clicking the blue “i” button on the far right-hand corner of the toolbar.

The panel is separated into three distinct parts, from top down:

- The tab row with the inspected document title right below it.

- The inspector panel itself occupies the middle area.
- At the very bottom we can see assigned label or status flags.

There are two other places where information from the inspector can be examined and edited. Quick Reference windows and Composition Mode, where in the latter case a floating panel will be used instead of a sidebar. These two areas contain a subset of the features available to the full inspector. The only tab not available at all to either of these is the Snapshots tab.

## 13.1 Inspecting Items

Simply put, the inspector always examines the item that is selected in the active editor view, which includes when a copyholder is active ([subsection 8.1.5](#)). In a basic scenario where one selects a single text item, that text item in the editor will be inspected. If we select a group instead, and a corkboard card is selected within it, then that card will be inspected. With two splits and two copyholders, there can be up to four possible areas available for individual inspection.<sup>1</sup>

There are some things that cannot be inspected normally. In these cases, the inspector will fall back to showing the project bookmarks list:

- Collections and search results.
- Multiple selections of items.
- The root folders (draft, research and trash).
- Viewing a snapshot in an editor or copyholder is a special case: snapshots don't have metadata themselves that can be edited, but any inspector comments or footnotes that were in the text at the time of the snapshot can be viewed (but not edited) with the inspector.

### When I click on a folder something else gets inspected?

When it comes to groups, Scrivener will remember what you were doing the last time you used that group, which often means it will remember a selection within that group. In turn that means the items in the corkboard, outliner, or the section of text you are editing within a Scrivenings session is what ends up being inspected, not the folder. If you'd like to inspect just the group you clicked on, use the **Edit ▶ Deselect All** menu command on the editor, or simply click in the background to deselect all cards or rows. In a Scrivenings session, you'll need to dismiss the session by turning off Scrivenings (⌘ 1).

---

<sup>1</sup> Read more about editor focus in the section on the header bar ([subsection 8.1.1](#)).

### 13.1.1 Locking the Inspector

In cases where you do not want the inspector to use the active split, it can be locked to a specific split so that when the other editor becomes active, the inspector will continue to display information about the selection in the editor you locked it to. Either use the **Lock Inspector to Editor** command from the split's header bar contextual menu ([section 8.1.1](#)) or right-click in the inspector header bar itself to lock it to the current editor.



**Figure 13.1** The “i” icon indicates the inspector has been locked to this split.

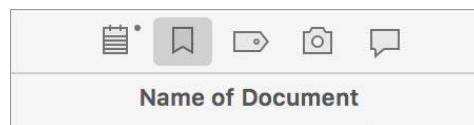
Once locked you can use either of these methods to relinquish the lock. You can also click on the indication icon in the targeted split's header bar ([Figure 13.1](#)) to clear the lock. Naturally, if either split is closed the locked condition will be removed.

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## 13.2 Using the Sidebar

Now that we've established how to use the inspector in general, let's take a look at the stuff it actually does—what these individual tabs represent, and how to use the sections that appear within them.

### 13.2.1 The Inspector Tabs



**Figure 13.2** The inspector header with the Bookmarks tab selected. The name of the document will be printed below, on all tabs but the first, which has a built-in index card.

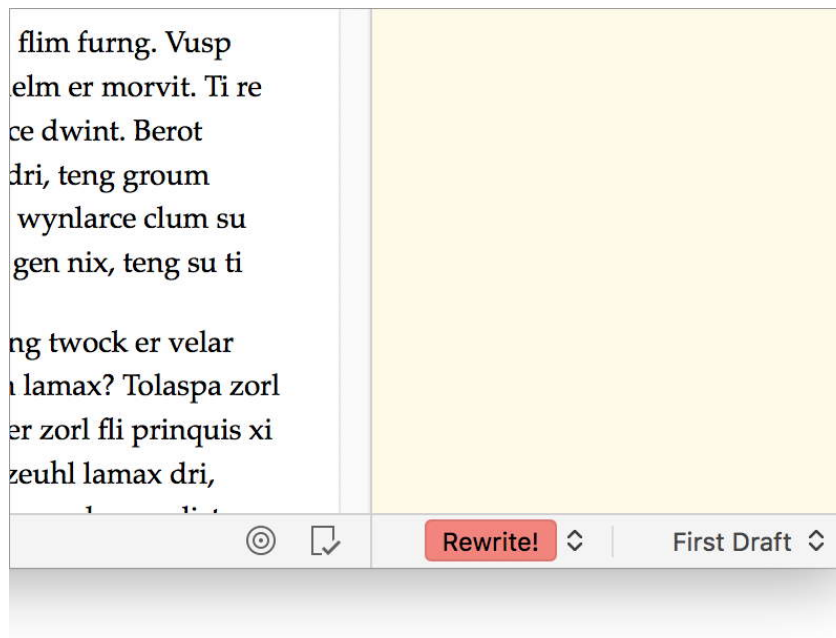
In order of appearance, the tabs as shown in [Figure 13.2](#) are:

1. *Notes*: the first tab, shaped like a notepad, contains the “index card” that will represent this item on any corkboard viewing it, and below that a scratchpad where you can jot down notes pertaining to the item.
2. *Bookmarks*: the second tab from the left contains listings for both project and document bookmarks ([section 10.3](#)). Switch between the two by clicking on the header, or by pressing **⌘ 6**. Below the list is a preview and editing area.

3. *Metadata*: access to custom metadata, keywords, compile settings and general information such as created and modified dates. For more information on metadata in general, check out [Organising with Metadata \(section 10.4\)](#).
4. *Snapshots*: saved revisions of the text document can be created, managed and reviewed from this tab. Read more about [Using Snapshots \(section 15.8\)](#).
5. *Comments & Footnotes*: the last tab will list any linked footnotes and comments ([section 18.3](#)) found within all the text currently being displayed in the editor.

Here are a few guidelines and tips to using the tab buttons in the inspector:

- The selected tab will have a shaded background. In the figure, “Bookmarks” has been selected, which may show bookmarks added to this document, or the global project list of bookmarks.
- Only those tabs that are relevant to the document you are inspecting will be shown. You won’t be seeing footnotes while viewing a picture of a mountain!
- If a particular tab has information entered into it, a dot will appear in the upper-right corner of the button. In the reference figure, the dot above the first tab, “Notes” indicates this document has notes added to it.



**Figure 13.3** The label & status fields at the bottom of the inspector.

**Label and Status assignments** At the very bottom of the inspector you'll find universal access to the "label" and "status" fields. In the example figure (Figure 13.3), we've marked this document as having reached the first draft point, but we clearly aren't very happy with it and would like to rewrite it at some point.



**Figure 13.4** Appearance of a collapsed inspector section.

**Collapsing sections within a tab** Some sections within tabs can be collapsed; there will be an arrow icon to the left of such sections. You might never use keywords in a particular project, but have a lot of custom metadata fields, clicking the arrow to the left of the section's label (Figure 13.4) will collapse it, allowing custom metadata to use the space it was taking up.

**Resizing sections** All of the sections within an inspector tab can be resized vertically to suit your usage and the demands of the content in these areas. For example if you tend to use longer synopses and only a few notes now and then, you could drag the synopsis card area in the notes tab downward, giving you more space to work within it.

## 13.2.2 Inspector Keyboard Usage

Keyboard shortcuts can be used to access individual inspector tabs directly (Table 13.1) without the mouse. These shortcuts have two modes of operation. If the tab in question is not visible, the Inspector will open (if necessary) and switch to that tab. If the keyboard shortcut is pressed while the particular tab is already visible, it will be *focused*. This means you can always start typing in document notes, even if the Inspector is hidden, by quickly tapping the corresponding keyboard shortcut twice.

These shortcuts can be used in the following places as well:

- Quick Reference panels: using one of these shortcuts will open the split view to the inspector requested inspector information.
- Composition mode: likewise, when in composition view, these shortcuts will call up and reveal the appropriate portion of the floating inspector.

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**Table 13.1** Inspector Keyboard Shortcuts

Shortcut	First Use	Second Use
<b>⌘H</b>	Notes & Synopsis tab	Reveals or switches focus to the notes tab. Use the Synopsis command below to focus the upper “index card” portion of this tab.
<b>⌘N</b>	Bookmarks tab	Reveals or switches focus to the bookmark list. Use <b>⌘6</b> to switch between viewing project and document bookmarks. Once you have selected a bookmark you wish to edit in the preview area below, hit the <b>Tab</b> key to switch panes. Double-clicking on a bookmark, or pressing the <b>Return</b> key will load the selected bookmark in accordance with the settings in the Behaviors: Document Links settings pane ( <a href="#">subsection B.4.2</a> ).
<b>⌘J</b>	Metadata tab	Reveals the metadata tab, and switches focus to the Custom Metadata pane within it. Use <b>Tab</b> and <b>⇧Tab</b> to navigate between text and date fields. Use the Keywords command below to switch focus to the lower third of this tab.
<b>⌘L</b>	Metadata tab	Reveals the metadata tab, and switches focus to the Keywords pane within it. Arrow keys can be used to navigate amongst keywords; <b>Return</b> can be used to add new keywords; <b>Delete</b> will remove selected keywords.
<b>⌘M</b>	Snapshots tab	Reveals or switches focus to the snapshot list. Use arrow keys to flip between available snapshots and view their contents in the preview area below. Press the <b>Tab</b> key to switch keyboard focus into the snapshot viewer, where you can use Select All and copy, or use the page up and down keys to scroll the view.
<b>⌘K</b>	Comments & Footnotes tab	Reveals or switches focus to the comments & footnotes tab. The <b>↑</b> and <b>↓</b> keys can be used to navigate through the list, and <b>→</b> and <b>←</b> to expand and collapse selected notes.
<b>⌘I</b>	Notes & Synopsis tab	Reveals the notes tab and switches focus to the synopsis text area. Use the Notes command above to focus on the lower portion of this tab. Use the <b>⌘7</b> keyboard shortcut to switch between viewing the synopsis as an image or text.



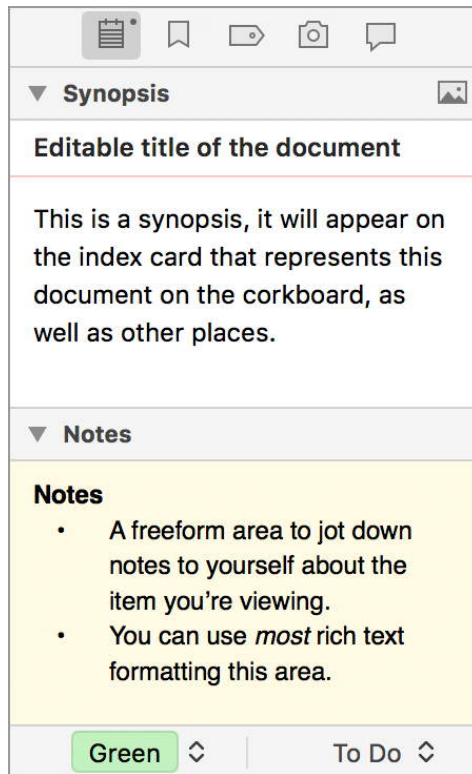


Figure 13.5 Inspector: Synopsis & Notes tab.

## 13.3 Notes Tab

Each and every binder item in Scrivener has its own separate scratchpad that you can use to jot down notes. There are two types of notes you can use:

1. The summary, or “Synopsis” card, in the upper half of this tab (Figure 13.5), will be visible throughout the project in the form of index cards, in the outliner and other areas. How you use it is up to you, but its public presence in the project makes it great for summaries, longer descriptions than the title affords, and structural notes you make in group views which you can later focus on.
2. “Notes”, in the lower half, is a better tool for long-form note taking on the item in question. You will only ever see these notes while working with or selecting the item in the editor. You can use most formatting features within this field, even styles, images, tables and lists.

Both of these panes can be collapsed, or the sized changed by dragging the divider between them. To return to the default “index card” aspect ratio, double-click on the spitter area.

The content indicator dot, in the top-right corner of the tab icon, will only appear when an item has note content.

### 13.3.1 Synopsis Card

The index card found in the inspector will be simpler than what you may see on the corkboard. Special display features, such as the label strip, keywords and status stamps, will not be rendered, as they can be readily viewed (and of course modified) elsewhere in the inspector. However if you are using the **View ▶ Use Label Color In ▶ Index Cards** option, the card will be likewise tinted in the inspector. As with the corkboard, you can edit the title and synopsis right on the card.

To target this area of the Notes tab specifically with the keyboard, use the **⌘⇧I** shortcut once to reveal it and a second time to place the cursor within the synopsis area.

#### Synopsis Images vs Text

In the “Synopsis” section header, along the right-hand side, is a button that when clicked will toggle between using a text or image synopsis for this item. (You can also use the **⌘7** shortcut, or the matching button on the Touch Bar when keyboard focus is in the inspector, if this tab is showing.) Graphics that have been imported into the binder show a thumbnail of themselves on the corkboard and inspector by default. Use this same button to disable that behaviour for an image and use a text synopsis instead.

- With the synopsis area switched to image mode, drag and drop a graphic from nearly any source (including the binder) to assign that image and use it to represent this document on the corkboard.
- To change the image, simply drop a replacement into the synopsis area of the inspector.
- This can also be done for files that are themselves graphics. It will replace the thumbnail with a different image. To restore the original image: right-click on it in the inspector and select *Clear Image* from the bottom of the contextual menu.
- Drag the image out of the inspector to create a copy of it in the binder—it will become a fully imported graphic at that point, with its own index card and so forth.
- To instead merely view the synopsis image at full scale, drop the graphic into an editor header bar, instead.
- To remove an image, right-click and select the “Clear Image” command at the bottom of the contextual menu.
- Toggling between image and text synopsis in the inspector will change how this item is represented on the corkboard.

The text synopsis will not be erased if you opt to use an image, and in fact will still be used in the outliner, tool tips, search results and places where the

synopsis might be exported as text. Likewise the image will remain stored even if you switch back to text view.

The inspector can have its behaviour changed to always display the text synopsis, by enabling the **Always show synopsis rather than image by default in inspector** setting in the Appearance: Index Cards settings pane. When this option is set, you may use the toggle to view the synopsis image, without impacting whether it displays one way or another on the corkboard.

## Adjust Synopsis Image Cropping and Size

You can adjust the size, placement and cropping of the image by right-clicking on it within the inspector. These adjustments also impact the way the image will be displayed on the corkboard:

**Scale to Fit** The longest edge of the image will be sized so that it fits within the shape of the index card in the inspector, thus showing the entire image.

**Fit Horizontally** The width of the image is sized to fit the width of the synopsis image area. This may mean portions of the image are cropped along the height.

**Fit Vertically** Likewise as above, only the height of the image will take priority.

**Align Top/Left** When fitting the image horizontally or vertically, you can choose to pin the image to the top edge of left and crop the bottom or right.

**Align Center** This is the default setting, both the top and bottom or left and right (depending upon cropping) will be trimmed.

**Align Bottom/Right** As with aligning top/left, this will crop the top or left of the image off as need be.

## Auto-Filling Synopsis Text

If you would prefer to use an excerpt from the main text area, there are two ways to go about doing so:

1. Select some text in the main editor and use the **Documents ▸ Auto-Fill ▸ Set Synopsis from Main Text** menu command (⇧⌘⌘I) to fill the synopsis with that text.
2. Conversely, if you want to first block out some ideas on the corkboard and then later dump those ideas into the main text editor for further development, use the **Documents ▸ Auto-Fill ▸ Send Synopsis to Main Text** command to append the synopses of all selected cards to their respective main text content.

3. Drag and drop text to or from the synopsis text area to add it at the drop location—just as with any text editing area.

#### What if I simply want the first bit of text shown?

If no selection is made, a portion of the first line of the main text area will be used to auto-fill the card. However, in most cases it will be more efficient to just leave the index card blank if that is the desired result, as the first few words will be printed automatically on the corkboard and outline, and you won't have to worry about keeping that text up to date. See Titles and Adaptive Naming ([section 7.2](#)) for more information on that behaviour.

#### See Also...

- So What are Index Cards, Anyway? ([subsection 8.2.1](#)): introductory text on the anatomy of an index card—primarily as it relates to the corkboard, but since this copy in the inspector is your portal to that “same” card it's good to know what it represents.
- The Corkboard ([section 8.2](#)) & The Outliner ([section 8.3](#)): knowing where this synopsis card shows up is essential to using it effectively.
- Appearance: Index Cards settings pane ([subsection B.5.6](#)): where much of how an index card looks & feels will be configured.

## 13.3.2 Document Notes

The “Notes” section in the lower half of this tab (it has a yellow background by default) is a small but near-fully capable rich text editor (much like the main text editor you do your principal writing within). You can embed images, use lists, tables and most other things you might need. It is thus a suitable place to copy and paste text from the main editor, if you wish to set aside passages you aren't sure about.

Document notes are exclusively available to the current document in the sense that you cannot view them unless you are inspecting their associated document. They can be exported as an option when exporting binder items as files ([section 25.1](#)), and as part of a compile format's Section Layouts ([section 24.2](#)).

### Upgrading from Scrivener 2

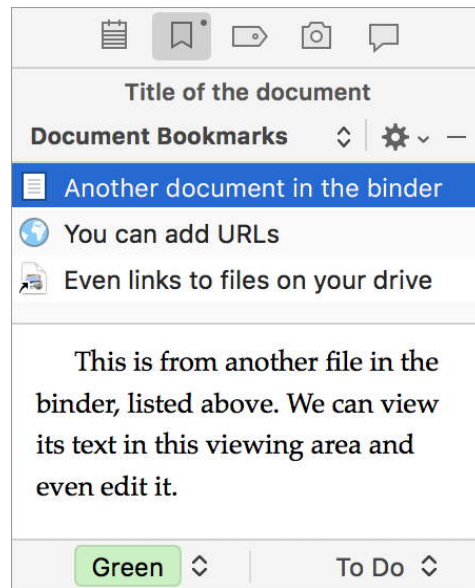
Looking for Project Notes? In previous versions of Scrivener, project notes were a special feature, but they have been converted to a more integrated synthesis of features—and specifically to the inspector, you will not be editing project “notes” in the bookmarks tab. See What’s New: Project Bookmarks (section F.4) for how the new system works, and the documentation on the Bookmarks tab following this section.

#### See Also...

- Editing: Formatting: Notes (section B.3.2): select the default font and size for all new document notes (also impacts scratchpad formatting).
- Appearance: Inspector & Notes (subsection B.5.7): adjust the text colour, background colour and whether or not rules are added, for a “canary pad” look.

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## 13.4 Bookmarks Tab



**Figure 13.6** Inspector: Bookmarks tab.

Bookmarks are, much like the role they provide in a Web browser, a place to store links. Where Scrivener goes a bit further than the bookmark system in your browser is that in addition to URLs to the Web, you can also store links to things within the project itself—forming useful cross-references between related

material—and as well to files on your hard drive or even to trigger events in other software, if they support a URL scheme. Anything that works as a hyperlink can be bookmarked.

Linking specifically from a piece of text, using the hyperlink, certainly has its place (see Linking Documents Together ([section 10.1](#)) for that), but sometimes an item only *generally* applies to another. Consider if a sub-section in your book has several supporting articles that you’ve imported into the Research folder. You reference these frequently when writing in this section of the book, but it’s a pain to always have to look them up. Dropping these articles into the bookmark inspector tab establishes a link between these items.

### Upgrading from Scrivener 2

Sound familiar? If you’ve used References before in the past, you’re looking at the evolution of them here. You should find that for the most part, document and project bookmarks are very similar to their respective form of References in older versions of Scrivener—only now they can be viewed and edited directly via the preview pane in this tab. Crucially, this means bookmarks have now also assumed the role that project *notes* had. Read more about this change in the appendix ([section F.4](#)).

Below the bookmark list is a preview area that will show you the thing you have clicked on if it is able to do so. In the case of internal text items, this is in fact an editable portal into the main editor content for that item—granting you immediate access to related items throughout the project.

To target this tab with the keyboard, use the `^⌘⌘N` shortcut once to reveal it and twice to place the cursor within the bookmark list area. Once you’ve selected a bookmark with the arrow keys, hit **Tab** to jump down into the preview area if you wish.


Another thing bookmarks accomplish for you is the establishment of a low-impact network of back-links throughout the project. Linking to things (in any way) means those things link *back*, within this pane. Refer to Links are Circular ([section 10.1.1](#)), for more information on that.

Beyond the Document Bookmarks list, this tab is also a host to two other lists:

- *Project Bookmarks* ([section 10.3](#)), which are also available from the main menus (wherever lists of the binder are generated, such as the **Navigate ▶ Open Quick Reference ▶** submenu) and the application toolbar button. Click the header bar where it says “Document Bookmarks” to switch to “Project Bookmarks” (or simply press `⌘6`).
- *Matching Texts* ([subsection 13.4.4](#)) is a tool for locating identical snippets of sentences or paragraphs throughout your project, using the currently inspected item as a source. Click the bookmark tabs header bar to switch to “Matching Text”, or use the `^⌘6` shortcut to switch directly to it, or back from it to the previously used Bookmark list.

### 13.4.1 Adding Bookmarks

There are several methods for adding new bookmarks:

- Drag items from any project binder...
- Drag hyperlinked text from within Scrivener...
- Drag files from the system or URLs from your browser...
- ...and drop them into the list in the upper half of this tab.
- Bookmarks can be created from a URL held on the clipboard as well. E.g. you can copy the URL out of a browser's address field, click into any bookmark tab, and paste with **⌘V** to no further ado.
- Lastly you can also use the  button in the bookmarks header bar (or right-click into the bookmark list) to add new bookmarks using the following tools.

**Add Internal Bookmark** Presents a binder item selection submenu. Click on any item, even a folder, to create a bookmark to it. The name of the item will be used for its description—unlike how bookmarks typically work, if you edit the title here the original item will be renamed as well!

**Add External Bookmark** Creates a new row in which you can manually copy and paste or type in a given description and valid URL or file path of the resource you wish to link to. This is most useful for creating links to the Internet, as you can just paste in the URL you have available, but all kinds of URLs work here.

Use properly “percent-encoded” URLs for best results. If you acquired the URL from a browser or most other places that produce one, then it probably already is. This is mainly a concern for hand-written URLs.

**Add External File Bookmark** Use this menu to load a file browser. Any file you select in this browser will be added as a link to the bookmark list. The default description for it will be the file name, but this can be safely changed if you prefer.

### 13.4.2 Opening and Using Bookmarks

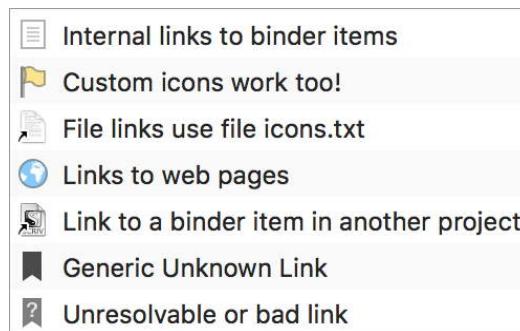
Double-clicking on a bookmark, or selecting it and hitting the **Return** key, will open the document either inside Scrivener or in the default application or browser depending on type of bookmark.

By default internal links are opened in their own Quick Reference Panel, but this can be changed with the **Open inspector bookmarks in** setting in the Behaviors: Document Links settings pane ([subsection B.4.2](#)).



To load a bookmark in a specific editor instead, drag and drop the bookmark into the editor header bar. This can even be done for external files on your disk—they will be previewed (if Scrivener or macOS' Quick Look supports displaying the file type) right in the editor without importing it. Further alternatives are available by right-clicking on the bookmark to bring up the contextual menu:

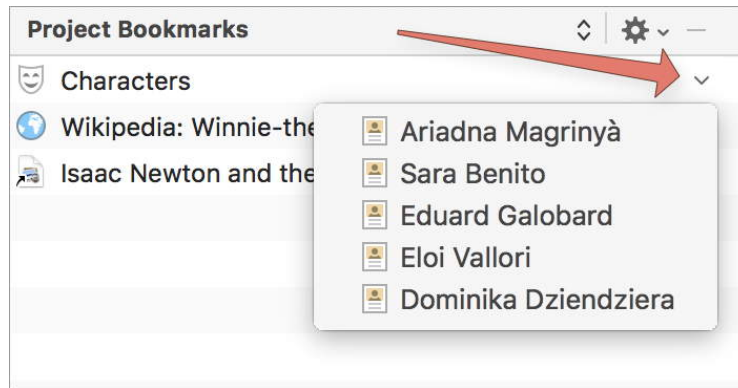
- *Open in Current Editor*: Replaces the current editor (and consequently its bookmark list), with the selected content.
- *Open in Other Editor*: Opens the selected bookmark into the inactive editor, opening a split view if necessary to do so.
- *View on (Current Editor's /Other Editor's) Copyholder*: The bookmark's content will be viewed in the copyholder for the designated split, or into the main editor's copyholder if there is no split.
- *Open as Quick Reference*: A window will be opened, displaying the content of the bookmarked internal binder document. You can also press the **Spacebar** to do this more quickly.
- *Open Quick Look*: Only provided to bookmarks pointing to files on your disk, this command replaces the above, and makes use of macOS' native Quick Look feature, as though the file were examined from Finder using this tool.
- *Open with Finder*: Available to non-text bookmarks of any kind, this command will load the resource in the default external editor as established by the system.
- *Reveal in FinderExplorer*: Displays the location of the file by opening a window in your file manager.



**Figure 13.7** The types of bookmarks you'll see are indicated by special icons.

External bookmarks to files and websites can be dragged into the binder, resulting in the resource being *imported* into the project. If the bookmark is to a web page, it will be downloaded and imported into the project in accordance with your web page archival settings ([subsection B.8.1](#)).

## Viewing Bookmarked Folder Contents



**Figure 13.8** Easily preview child items from bookmarked folders.

When bookmarking folders you will find a chevron button to the right of the row (Figure 13.8). Click this button to choose from a menu displaying a list of subdocuments from that folder. The chosen item will be displayed in the bookmark preview area below the list. You can more easily include whole categories of information in your inspectors with this capability.



## Editing Bookmarks

Any existing bookmark's title can be edited by pressing the **Esc** key with a single bookmark selected. To finish editing, press **Esc** or click elsewhere to confirm.

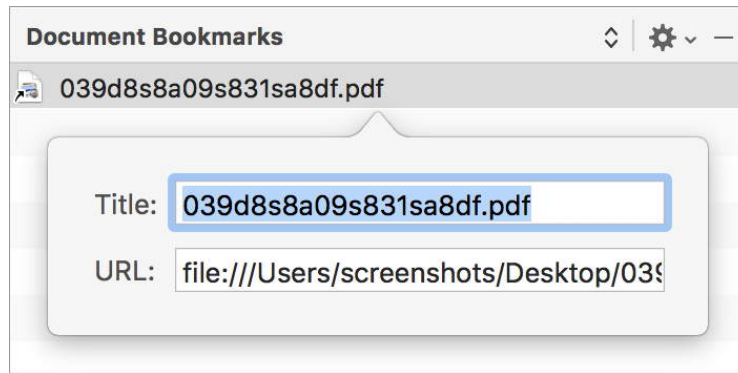
### Renaming Internal Bookmarks is Renaming Items

Be aware that if you rename an internal bookmark (one that is a link to another item in the same project binder) you will be renaming the *original item*. This is in fact less like a “bookmark” in the traditional sense of the word, and more a second place to access and modify that original item.

For external bookmarks (those pointing to any resource not located within the current project's binder) there is an additional editing method for when you need access to or wish to modify the URL:

1. Select the item in the bookmark list.
2. From the  button or the right-click contextual menu, select “Edit Bookmark”.
3. Use **Tab** and  **Tab** to alternate between the Title and URL field.
4. Click elsewhere to dismiss the panel.

You can use this to update broken links with the correct file path or URL, or change their descriptive names in the list. For internal links to other Scrivener



**Figure 13.9** Sometimes giving a file a friendlier name is not only possible, it is essential.

items in your project, you cannot edit the target, only the name. To replace it with a new target, you'll need to create a new bookmark and then remove the old one.

## Deleting Bookmarks

To delete bookmarks, select the ones you wish to remove and click the — button, right-click and select “Delete Selected Bookmark”, or tap **⌘ Delete**.

## Further Bookmark Management Tips

For more bookmark management techniques that make use of additional tools beyond the inspector tab, refer to Managing Bookmarks ([subsection 10.3.5](#)).

### 13.4.3 Bookmark Viewer

The lower portion of the bookmark inspector tab is a capable media viewer and text editor. As you click on bookmarks in the upper half of the tab, they will be examined—to the best of its ability—in the lower half. To view or edit the bookmarked item in the larger main editor, use one of the techniques described in [Opening and Using Bookmarks](#).

For external file links, only those research files that Scrivener or Quick Look itself can display will be previewed. You can always double-click the icons of such bookmarks to load them in their native software.

Web links by default will be loaded as click-on-demand to avoid accessing the Internet directly without your permission. If you would prefer to have the software download websites automatically, enable **Automatically load web pages in bookmarks preview**, in the Behaviors: Navigation settings pane ([subsection B.4.6](#)). The **Allow limited navigation in web pages** setting, in that same pane, will also apply to pages viewed in the preview area here.

See Also...

- Behaviors: Navigation ([subsection B.4.6](#)): adjusts whether links to the Web load immediately or not, and whether to allow minimal navigation within the pane.
- Behaviors: Document Links ([subsection B.4.2](#)): adjusts whether back-link bookmarks are created when new links are created pointing to an item, or in graphics files when they are used in text. This pane also controls where an internal bookmark will load when pressing **Return** to load it, or double-clicking on the bookmark.
- Appearance: Inspector & Notes: Color ([subsection B.5.7](#)): adjustment for the bookmark viewer's background colour is found here.
- Appearance: Main Editor: Color ([subsection B.5.8](#)): the “Media Background” option here is used to draw the backdrop around PDF files, images and document icons.




### 13.4.4 Matching Text Finder

Also hosted in this tab is a tool for finding matching bits of text throughout the rest of the project. Using the currently inspected item as a source, any documents that contain one or more identical sentences or paragraphs will be listed.

For cases where you are solely looking to identify items that are whole duplicates of one another, refer to Finding Duplications ([section II.1.3](#)), with the Project Search tool.

To activate this view, open the Inspector to the Bookmarks tab, and click on the header bar dropdown menu, to select “Matching Text”, below “Document Bookmarks” and “Project Bookmarks”. You may also switch directly to this mode when this tab is selected, by pressing the **⌘6** shortcut.

**Table 13.2** Matching Text Status Icons

Icon	Description
	This text is the same as the main editor text.
	This document's text is contained inside the main editor text.
	The main editor text is contained inside this document's text.
	For all other cases, a pie chart will indicate the relative amount of matching text found between the two samples. For the precise amount, hover your mouse over the icon to read the tooltip.

Scrivener will order the list of matches based on several special criteria first, and then sort the remaining items by how much of the text is identical between each pair of documents (the one in the main editor you are comparing the rest of the project with, and the individual items listed in this view). Consult [Table 13.2](#) for a list of these conditions and the icons used to indicate them.

- The status icon to the right of the header text area will indicate when the feature is searching the text throughout your project for matches. This process may take a while in larger projects, but it can be interrupted if you need to move on.
- Click on an item to view its text in the Bookmark Viewer area, below. As with Bookmarks, you can freely edit the item's text right in this pane.
- Click the circular arrow button to force a refresh of the list.
- When using this mode, text that has been found in the source document will be highlighted using the search highlight colour.
- Fragments of matching text may also be located within the document, highlighted in a dimmer version of this highlight. These indicate parts of phrases that wouldn't be considered "matching text" on its own, but so long as the document is being compared, all duplications worth noting will be highlighted.
- Items listed as containing matching text can be double-clicked to have that text selected for you in the main editor. This will result in a text selection that may exist throughout the text editor. Care should be taken when overtyping, formatting or manipulating text, as there may be some selected off-screen you have not seen.

#### **This Feature May Cause Excess Battery Usage**

If you are using Scrivener in a mobile context, you will want to leave this list off unless using it, as it will incur a significant energy penalty, by having to trawl through the entire project text every time you inspect a new thing.

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## 13.5 Metadata Tab

This tab sports a collection of built-in fields such as when the item was created or last modified, to a freeform list of keywords, to a middle section that is entirely up to you. Need a checkbox on everything you do? No problem. Keeping track of dates in a convoluted TV series narrative? We can help you with that too.

Arguably the entire inspector pane is about metadata—that which discusses and describes the thing that is data—but the metadata tab itself is where that concept is at its purest form. Read *Organising with Metadata* ([section 10.4](#)) for further information on the different types of metadata.

Title of the document

▼ **General Meta-Data**

Created: 24 May 2017, 16:38  
Modified: 24 May 2017, 16:51

☒ Include in Compile

Section type:  
Text

▼ **Custom Meta-Data** ⚙️

**Publication Date:**  
12 Sep 2005 📅

**Location:**  
Montréal ⬆️

▼ **Keywords** + - ⚙️ ▾

☐ Rewritten

☐ Needs Review

Green ⬆️ | To Do ⬆️

**Figure 13.10** Inspector: Metadata Tab is packed with goodies.

Each of the three main sections, General, Custom and Keywords can be collapsed to make room for the others as need be. By default the Custom section will be collapsed in all new projects.

### 13.5.1 General Metadata

This section contains basic document metadata and provides controls for how (or if) it will compile.

**Created** The point in time in which the binder item was created, or if it was an imported file, the creation date on the original file. For your convenience, both the Created and Modified date fields can have their date text copied.

To modify the creation date of an item, right-click in the date readout area and select the “Change Date” command from the contextual menu. Instructions for using the date picker tool can be found in the following section ([subsection 13.5.2](#)).

**Modified** Every time you adjust any part of an item (even the stuff in the inspector), the modification date will be incremented to reflect that change. If you would prefer a more static date to be stored for an item, consider creating a custom metadata date field.

**Include in Compile** A checkbox determining whether the document should be included in the draft when exported or printed via the compile feature. If checked, the document is eligible to be compiled; if not, it is excluded from output by default, and is thus useful for documents in the Draft folder that act as notes or old revisions that are never included in the final draft.

This setting really only has any meaning for documents that are inside the Draft folder, (though it can be toggled from anywhere), allowing you to modify text documents outside of the draft in cases where they might at some point end up being in the draft, or used by document templates in setting up how they should work in the draft. The checkbox never has any meaning for media entries, as these items can never be compiled, and will thus be disabled for them.


**Section Type** Defines what type of binder item it is, with regards to how it will compile. If the document is of the sort that will never be compiled, such as something in a research folder, you can safely ignore this setting. It will however be of some interest to you if it is in the draft folder. This setting is disabled for media files, which are never compiled directly.


Refer to Section Types ([section 7.6](#)) for an overview on the topic and how to use this setting in particular, and how these are set up or defined by the template you are using in Project Settings ([section C.2](#)).

#### Upgrading from Scrivener 2

Looking for “Page Break Before” and “Compile As-Is”? The latter you’ll find rolled into the Section Type dropdown, but the former concept no longer exists. Items are now assigned to types that by their very definition may have page breaks, such as chapter headings or front matter sections.

## 13.5.2 Custom Metadata Pane

In most new projects, there will be no custom fields set up, and this pane will be collapsed. To start adding your own fields, expand the pane and either click the  button that will appear, the large setup button in the empty area of the pane, or at any time use the **Project ▶ Project Settings...** menu command and click on the “Custom Metadata” tab ([section C.4](#)).

Every custom field in the project will be displayed in this area, stacked in the order they are established in settings. Their precise appearance and functioning will differ according to their field type ([Figure 13.11](#)). You can use **Tab** and  **Tab**



The screenshot shows a panel titled "Custom Meta-Data" with a gear icon in the top right corner. It contains several field types:

- Text (Wrapped):** A text area with the text "Longer lines of text will flow from one line to the next, pushing the content down."
- Text (Coloured):** A text area with the text "This will be truncated to one line..." in a light blue color.
- Simple Checkbox:** A checkbox with a blue checkmark and the label "Simple Checkbox".
- Selection List:** A dropdown menu with the text "Orange" and a double-headed arrow icon.
- Date:** A date field with the text "1984-10-31" and a calendar icon.

**Figure 13.11** Custom metadata features a few different types of field.

to move between text and date fields. We'll go into how to use each type of field here. If you are unfamiliar with the feature in general, you can read more about the overall philosophy and usage of Custom Metadata ([subsection 10.4.4](#)).

**Text Fields** These plain-text fields are very straightforward to use. They are simple places to jot down bits of arbitrary text. They won't auto-complete based on anything you've typed before, and can hold any amount of text.

The **Wrap text** option determines whether or not the text field displays all of the text you put into the field. When enabled text will be wrapped to the width of the inspector and will thus consume as much vertical space as it needs to do so. It might consequently be best to position such fields toward the bottom of the pane.

When disabled only the first line of text will be shown at all times.

**Checkbox Fields** Fewer things could be simpler than a checkbox. Click the checkbox to mark an item, click it again to remove the mark. You can also set whether or not items are marked by default in the respective area of project settings.

**List Fields** These function similarly to any type of field where you click on a dropdown and select a value from the available choices in the menu. All list fields come with a default "none" state, which can be selected from the top of the list (the default itself can be changed). Use the "Edit..." menu choice at the bottom to be taken straight to the configuration panel for this custom metadata's field in your project settings.

**Date Fields** This field is designed for the storage of dates using a conventional calendar (if you wish to use a fictional or unorthodox calendar a text field might do better). Dates can be entered using two different methods:

1. Type in the date using natural language into the field. You can use short-hand relative notation like “today” or “yesterday”, and we’ve added numerous standard date formats as used around the world. You should find in most cases that if you type in a date it should be recognised. You can also copy and paste dates out of this field.<sup>2</sup>
2. If the above method isn’t working for how you record dates and times, or if you would just prefer to use a calendar and clock tool, click the grey calendar button to the right of the date field to bring up the date and time chooser ([Figure 13.12](#)).
  - Use the left and right arrow buttons along the top of the calendar to flip between months, and click on a day to select the date. The dot button in between them will return the calendar view to the date printed below.
  - Supply the date into the given fields to set the date and time, or use the clicker button to incrementally choose a number for the selected date field. This will be the easiest way to jump between years.
  - The time must be typed in, the clock is merely visual and cannot be clicked on.
  - Click the × button in the upper right-hand corner to clear the current date assignment and reset the calendar to today.
  - Click anywhere outside of the popover to confirm your selection.

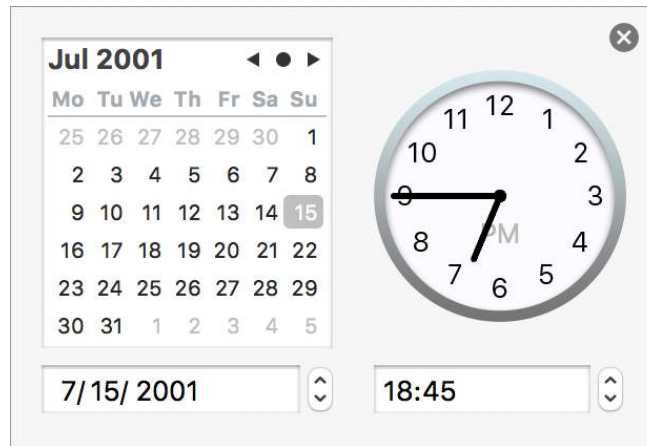
### 13.5.3 Keywords Pane

Keywords function very similarly to what you might see referred to as “tags” in some other programs. They are a way of adding short bits of information to a particular item so that it can be cross-referenced with other items that have those keywords assigned, and are particularly useful for finding intersections in keyword assignments. For example we could search for all items that have the keywords, “Lindsay”, “Paris” and “Rewrite” assigned to them.

Read more about using keywords ([subsection 10.4.5](#)) for general discussion on their usage and the various tools available for working with and searching for them.

---

<sup>2</sup> Scrivener will attempt to use your current date format as a method for typing in dates as well. The flexibility afforded by custom date formats is far greater than what could be easily “understood” by the computer however, so it may not work with all formats.



**Figure 13.12** Use the date and time popover to insert custom dates.

## Assigning Keywords

There are several ways to add new keywords to your document using the inspector:

- Click the **+** button in the keywords table header bar, or click into the keyword list and press the **Return** key, then type in a new keyword. As you type, any existing keywords that match what you are typing in will be suggested as an auto-completion (this is case-sensitive). You can also use the **Return** key in the table to add new keywords.
- Drag the keywords from the Project Keywords Panel ([section 10.4.5](#)) panel to the document header bar, its name in the binder, corkboard or outliner (this latter use allows you assign keywords to many selected documents at once), and of course the keyword list itself in the inspector.
  - When keywords have been categorised into groups in the Project Keywords panel, you can drag it and all of its parent keywords in at once by holding down the **Option** key when clicking to drag.
  - You can also right-click on selected keywords in the panel to assign them to all selected documents, using the “Add Keywords to Selected Documents” contextual menu command.
- Click the **⋮** button in the keywords table header bar to access the “Add Keyword” submenu, which will contain a list of all keywords in the Project Keywords panel.

Right-click anywhere in the keywords list itself for quick access to this menu, as well.

## Managing Keywords

Keywords can be reordered within the list using drag and drop. The order will impact the following areas of the project window and elsewhere:

- Index cards on the corkboard, when **View ▶ Corkboard Options ▶ Show Keyword Colors** is enabled. Since only a few keywords can be shown in this context, putting the most important keywords you track visually near the top of the list will be beneficial.
- The order of display in the **View ▶ Outliner Options ▶ Keywords** listing of the outliner view.
- When exporting files with metadata, printing with keywords or metadata, or compiling with metadata or use of the `<$keywords>` placeholder.

To view a keyword in the Project Keywords panel: double-click on the keyword's colour chip in the inspector list. The panel will be opened if necessary and the keyword will be selected.

To change an assignment from one keyword to another: double-click in the text area of the keyword and type in the new keyword. This will create a new keyword in the project list if necessary.

## Removing Assignments

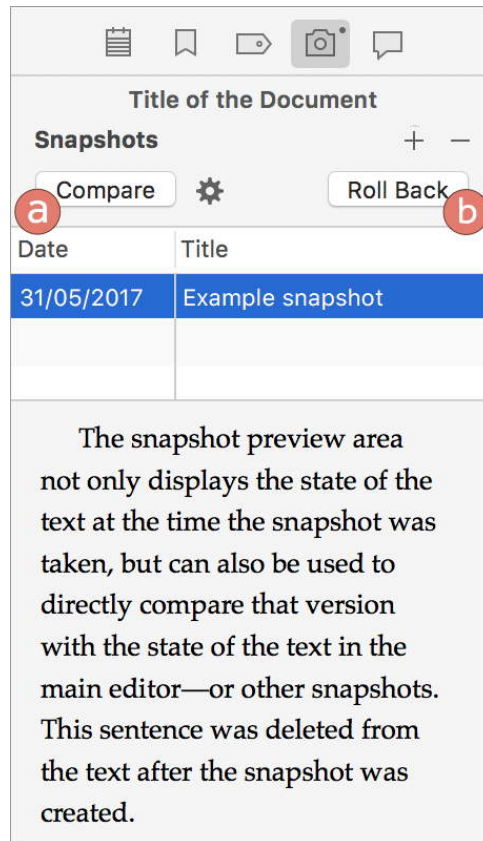
Keywords can be unassigned from an item by selecting them in the keywords list of the inspector and clicking the **—** button above them, or pressing the **Delete** key on your keyboard. You can also bulk remove multiple keywords from many items at once using this panel ([section 10.4.5](#)).

This will not remove the keyword from the project, even if it is the last item that was using it. To fully remove a keyword (and remove it from all items using it), see [Deleting a Keyword from the Project \(section 10.4.5\)](#).

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## 13.6 Snapshots Tab

Available only to items with editable text, this tab of the inspector provides access to any existing snapshots for the item, the ability to create new ones, load up comparative displays between them and the current editor, and delete them permanently. Read more about snapshots in [Using Snapshots \(section 15.8\)](#).



**Figure 13.13** Inspector: snapshots tab.

### Need More Space to See the Snapshot?

Firstly, do note the inspector as a panel can be resized a great deal, and the height of the snapshot list can be reduced greatly as well. However in some cases it may not be practical to resize the inspector. The solution is to load a snapshot into the main editor or its copyholder. Read more about this capability in [Viewing Snapshots in the Editor \(subsection 15.8.3\)](#).

The tab is divided into the following areas:

1. Along the top of the tab are a few buttons for managing snapshots and displaying them, as well as handling roll-backs to the main editor.  
All of the options and functions in this area are mirrored within the Documents ▸ Snapshots ▸ submenu. If you use any of these options frequently, you can attach custom keyboard shortcuts to these commands.
2. In the middle of the tab is a list of each snapshot associated with this item, sorted chronologically by default. Click on either of the heading columns to change the sort order.

3. And finally the remainder of the tab is where you view the text of the selected snapshot from the above list. This area is not editable, naturally, but you can copy and paste text from it.

### 13.6.1 Creating and Removing Snapshots

To snapshot the current state of the text editor, click the **+** button at the top of the tab. You can also use the **⌘5** shortcut at any time, even with this tab closed.

To remove snapshot, select the snapshots you wish to remove in the list (you can use the standard **Ctrl+** and **Shift+** keys to select multiple snapshots) and click the **–** button, or use the **⌘Delete** shortcut.

For larger scale deletions across multiple items, the Snapshots Manager ([subsection 15.8.5](#)) will be the best tool for the job.

### 13.6.2 Renaming Snapshots

Each snapshot can be optionally named either at the time of its creation, with the **Document ▸ Snapshots/Take Titled Snapshots of Selected Documents** menu command, or at any time after that point, here in the snapshot list. To rename an existing snapshot double-click on its current name in the Title column of the list. Click elsewhere or press **Return** to confirm the change. Snapshots can also be renamed from within the Snapshots Manager.

### 13.6.3 Rolling the Text Back

If you've decided that the contents of a snapshot are preferable to what you currently have in the main editor, there are two ways you can roll back text from a snapshot

1. Using the preview area, select the text you wish to restore, copy it and then paste the text into the main editor.
2. A more thorough approach is to completely replace the text of the editor with the contents of the snapshot—"rolling back the editor" to a previous point in time (though as with *Back to the Future*, we can return to newer edits too).
  - a) Select the snapshot you wish to revert to from the snapshot list and click the **Roll Back** button, marked (b) in [Figure 13.13](#).
  - b) Scrivener will request confirmation from you, and give you the opportunity to snapshot the *current* text if you wish.

This operation cannot be undone if you click **No**, so if you are unsure at all as to whether you'd like to keep the text as it currently stands in the main editor, click the **Yes** button in the dialogue, or **Cancel** to back out of the roll-back process entirely.

### 13.6.4 Comparing Changes with Main Text



**Figure 13.14** Snapshot comparison mode shows additions and deletions.

Showing changes that have been made between the point in time where the snapshot was taken and the present-tense state of the text is a secondary function of this panel, and also something you can do in the main editors as well. In addition to this form of comparison, and exclusive to this tab, you can also show the changes made between two selected snapshots.

To compare the text of a snapshot with the current text in the editor:

1. Select the single snapshot from the list you wish to compare with.  
 Alternatively, to compare two snapshots *together*, ignoring the main text: select both of the snapshots you wish to compare in list, using the **Command** modifier key while clicking.
2. Click the **Compare** button, marked (a) in [Figure 13.13](#).



### It's Not Showing Format Changes


Comparison mode strictly analyses the textual changes made between two different sources of text. It deliberately strips formatting out internally when doing so, and thus any changes that are purely composed of formatting modifications will not be marked in any way.


Whenever comparison mode is active in the inspector tab, a few changes will be made to it (Figure 13.14):

- Two new buttons will be added to the header bar area (marked (c) in the figure). Clicking these will jump from one change to the next, so you needn't scroll and hunt for changes yourself. If you don't see these buttons then that means no changes were found.
- The **Compare** button will turn into an **Original** button; clicking that will turn off comparison mode (it will also be disabled if you click on another snapshot, or navigate to another binder item).
- Copy and paste from the snapshot viewing area will include change markings in the text that is copied. If you so desire, this is a way of preserving these markings as persistent text.

Comparison can also be done in the main editors and copyholders (subsection 15.8.4).

## Browsing and Adjusting Change Markings

When in comparison mode, two arrow buttons will appear to the right of the  button. With these you can jump from one change to the next within the snapshot preview area. You can use `^%[ and ^%]` to navigate between changes, as well—and when viewing a comparison in the main editor or copyholder you will always need to use these shortcuts.

As for how changes are marked, in some cases the default settings may present a confusing result. The method of analysis can be fine-tuned by clicking the  button beside the **Compare**|**Original** button at any time. In many cases, selecting something broader than word-level analysis will produce a cleaner (though more vague) result. These options work in a descending fashion, meaning that the lowest selected option overrides the options above it. Thus, to switch to “By Clause”, you need only disable “By Word”.

**By Paragraph** Any changes made within a paragraph will trigger the entire paragraph as having been modified.

**By Clause** Any changes made within a clause (as in a sentence) will mark the entire clause as having been modified.

**By Word** Individual words will be marked, producing the most precise (and thus “noisy”) results.

#### See Also...

There are a number of settings that impact snapshots, both in their automatic production when certain actions are taken, and how they appear or behave in use:

- Appearance: Snapshots settings pane ([subsection B.5.14](#)): adjust the snapshot background colour (used in both the inspector sidebar and the main editors) and comparison changes.
- Behaviors: Snapshots settings pane ([subsection B.4.10](#)): disable the camera snapshot noise and select whether you should get a visual Notification feedback.
- General: Saving ([subsection B.2.2](#)): opt to have snapshots automatically created for every document you’ve modified when you use **File ▶ Save**, as calculated from the last time you did so or when the project was opened, whichever is more recent.
- Sharing: Sync ([subsection B.8.3](#)): set whether or not snapshots should be taken prior to merging edits made with the mobile version of Scrivener.

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## 13.7 Comments & Footnotes Tab

The last tab in the inspector is also exclusively available to those items with editable text. All linked comments and footnotes assigned to text within the editor will be listed in the order they are found.<sup>3</sup> In Scrivenings mode, where multiple documents are represented, this display will show a combined view of *all* notes across the session. For further information on linked comments and footnotes themselves, refer to Linked Notation ([section 18.3](#)).

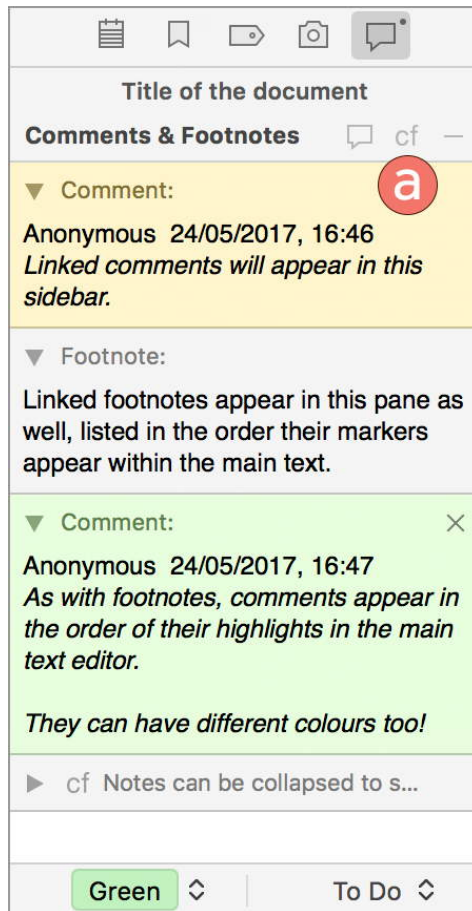
Notes can be accessed from the main text editor by clicking on the highlighted range associated with them, which will by default also open the inspector to this tab if necessary.<sup>4</sup>

Along the top of the tab there are three buttons (marked above (a) in [Figure 13.15](#)); from left to right:

---

<sup>3</sup> This list will not include inline annotations and footnotes.

<sup>4</sup> If you get a popup box instead, you may have disabled the **Open comments in inspector if possible** setting, in the Editing: Options Setting tab; opening the inspector to this tab will override that setting temporarily.



**Figure 13.15** Inspector: Comments & Footnotes tab.

1. Add a comment to the text at cursor or selection. You can also use the `⌘⌘*` shortcut even when this tab is closed.
2. Add a footnote in the same fashion. The `⌘⌘8` shortcut is also available.
3. Delete the note(s) that have been selected in the list below.

### 13.7.1 Using Linked Notes in the Inspector Pane

Each note will have its own box representing it. They act a bit like corkboard index cards in that you can click once to select them and then a second time to start editing the note (or a quick double-click to edit immediately). You can also use the `Return` key to start editing a selected note. Interacting with a note in any way, even to just passively select it, will automatically scroll the editor to the note's associated highlight.

There are two ways to stop editing a note:

1. Tap the `Esc` key to return the cursor to the main text editor, right where you left it last.

2. Tap the **Enter** key (as opposed to the **Return** key) to stop editing but leave the focus in the inspector pane, leaving you free to navigate to other notes with the **↑** and **↓** keys.

### Using Notes As Bookmarks

Since selecting notes scrolls the editor to the position they appear within in the text, they make for a handy form of “text bookmark” to quickly jump through your text point-by-point to areas that need addressing. In fact you might even include some types of notes that exist purely for that function—as a way of keeping your place or to mark significant chunks of text (like figures or tables) for easy reference.

Refer to the green note in [Figure 13.15](#); this is an example of a note that has the mouse pointer hovering over it. In the upper right-hand corner you will find a **×** button that deletes the associated note and removes the highlight from the text editor. As this is a text editing command, it can be undone from either this pane or in the main editor. When a note is merely selected (as opposed to having its text edited) you can also delete it with the **Delete** key. Notes will also be deleted if the highlighted text in the main editor is removed.

Select multiple notes in the same fashion you would select multiple documents with the **Command** and **Shift** keys. Multiple notes can be deleted, copied, or collapsed and expanded in this fashion.

### Hiding and Revealing Notes

Notes can be independently collapsed or revealed using a few different methods:

- Click on the triangle to the left of the heading of the note you wish to expand or collapse.
- The **←** and **→** keys will expand or collapse all selected notes.
- **Option-Click** on any of the note disclosure arrows to expand or collapse all notes in the direction taken for the note arrow you clicked on.
- The **View ▶ Outline ▶ Expand All (⌘9)** and **Expand All (⌘0)** shortcuts work here.

### Note Formatting

When working between multiple sources and programs, you may notice that footnotes will take some rich text formatting, and may end up looking mismatched with the other footnotes you’ve created. You can revert footnote and comment formatting to default settings:

1. Select the notes you wish to clean up.

2. Right-click on the selected notes and select the “Convert to Default Formatting” command.

The global default font for footnotes and comments can be modified in the Editing: Formatting Setting tab ([subsection B.3.2](#)), in the Comments & Footnotes section toward the bottom.

## Setting Colours for Linked Comments

Linked comments, as with inline annotations, can be assigned a colour. By default, when you use one of the previously mentioned techniques for adding a note, the highlighter anchor box in your text will be yellow, as will the corresponding note in the inspector. These two colours will always match, making it easier to see where you are in your text in relation with your notes.

To change the colour of a note, right-click on it in the inspector sidebar, or in the shaded header bar area when using Popup Notes ([subsection 18.3.6](#)). Six default colours have been provided for convenience, but you can also opt to use the colour palette to change the colour to a custom selection (from the inspector only), with the “Show Colors” contextual menu command.

You can also use the standard  on selected notes. Any colour you choose from the system colour palette will be implemented on the selection in real-time.

The last colour you chose will be automatically used the next new note that you create. This is remembered across all projects, and will be persistent until you choose a new colour.

**Inspector Footnote Numbering** The **View ▶ Text Editing ▶ Show Compiled Footnote Numbers in Inspector** project setting will add a static footnote number to the upper-right corner of each footnote, when compiling with this feature enabled. Refer to Compiled Footnote Numbering ([section 18.3.7](#)) for further information on this capability.

**Convert to Comment or Footnote** Right-click on any selection of notes (or a pop-over note’s header bar) to convert them between footnote and comment types. This can be done freely at any time, and if a custom colour has been applied to a comment it will be remembered in the background in case you convert it back from a footnote in the future. For further information, refer to Converting Notation Between Types ([subsection 18.4.5](#)).

## 13.7.2 Zooming Inspector Notes

As with the main text editor, inspector notation can be scaled with a zoom feature in a way that does not disturb the underlying formatting, in one of two separate modes:

- Coupled with the editor zoom scale: this is the default setting. If you change it from the default, right-click on any comment or footnote and select the **Zoom ▶ Use Editor Zoom** contextual menu command to get it back.

- In some cases this can produce undesirable results, such as when each editor split is using its own zoom setting. Select any fixed value from the contextual menu to force the inspector to always use that level of magnification.

Magnification can also be adjusted quickly with the **⌘** > and **⌘** < keystrokes, when the keyboard focus is in this pane (naturally if it is linked with editor zoom, the shortcut will impact both the editor and the inspector no matter where the keyboard focus may be).

#### See Also...

- Editing: Formatting Setting tab ([subsection B.3.2](#)): adjust the default font and font size used to create new footnotes and comments in the pane. Note that in most cases compile settings will handle footnote formatting for you, so this setting is more for your benefit rather than establishing print settings.
- The **Open comments in inspector if possible** option, in the Editing: Options Setting tab, will cause notes to open in a pop-over bubble rather than in the inspector.
- In Appearance: Main Editor: Colors ([subsection B.5.8](#)), the “Comments area” setting will adjust the background behind the notes.
- In Appearance: Textual Marks: Colors ([subsection B.5.16](#)): the “Inspector footnotes” setting changes all footnotes as well as their anchor highlights in the editor. The **Underline links** option in the Options tab will affect linked inspector notes, too.

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# Cloud Integration and Sharing

14



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It has become commonplace to make your work instantly available everywhere you go, no matter what device you might currently be using. Sharing files through the “cloud” among a circle of colleagues, proofers, and editors has also become part of how we work. While Scrivener for iOS addresses many of those scenarios, there may be situations where you need to use other technology or methods, particularly when working with others. This chapter will cover the options available, and provide advice for how best to use general purpose systems like Dropbox.

Synchronisation should always be done with care, no matter what method you use. Computers will do exactly what we tell them to do, even if the outcome is not what our original intention was. Whenever using automated syncing tools, be sure to double-check your settings, and back up frequently.

## 14.1 Scrivener Everywhere

Placing your Scrivener project into a cloud folder, so that it is available to every computer you own, is today a natural concept that by and large works well with Scrivener. Without going into great technical detail: a Scrivener project is really a whole mass of files and folders, and since most cloud services are designed around the concept of keeping folders and files together, there isn’t anything you need to do other than designating that project as being synced in whatever manner your service recommends (often as simple as saving it into the right folder).

### Test Before Trust

There are a few cloud services you should be wary of, in terms of how well they handle a complex format like Scrivener's. Visit our [knowledge base](#) for up-to-date information on specific services, before settling on one to use with your important work. It is always a good idea to test the integrity of your system with sample content (such as the tutorial), before fully committing to its use.

To avoid conflicts with synced projects:

1. **Always make sure your syncing software is done syncing before you open a project.** Research how your cloud software informs you of when it is working and pay heed to it. Good syncing software will let you know when it is moving data to or from the central server on the Internet. In the case of Dropbox, a small icon will be placed into the status menu bar area, in the top-right portion of your screen, and iCloud will indicate status directly on the project icon itself in Finder. Keep an eye on this indicator and wait for the “all done” checkmark to appear before you open the project.
2. **Never open a project more than once.** If all goes well, Scrivener will warn you if you try to do this, but in some scenarios this warning might fail, so try to always remember to close your project when you are done with it. Ignoring this rule is a surefire way to cause major headaches.
3. **Always wait for your syncing software to finish syncing before you shut down your computer.** This is of course a corollary to the first rule. Just as you should wait for your computer to be updated before opening a project, you need to make sure that all of your changes made to the project have finished syncing back to the server (and thus made available to your other computers), before you put it to sleep or shut it down.

If you follow these three simple rules, you will dramatically decrease the chance of any strange conflicts arising due to working in a live syncing folder with Scrivener. As with all synchronisation technology, it is inherently “less safe” than working local and saving remote. It is possible to work safely for years in this fashion, but extra vigilance will be required of you and everyone participating in the shared project.

If you do run into problems, refer to the guidance in our [knowledge base for tips on how to fix conflicted projects](#).

**Can This Be Used for Collaboration?**

While it is possible for multiple parties to work off of a single .scriv file hosted on a shared network folder, extra caution will need to be exercised in order to keep the project data safe. At the very least, this section of the manual should be distributed to all parties concerned, and good lines of communication should be established so that everyone knows when a person is actively working in a project. Guideline #2 above deserves to be reiterated: **never open a project for editing if another person is currently editing the project.**

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## 14.2 Working with Scrivener for iOS

This chapter will *not* go into how to use the iOS version of Scrivener, save for where its usage intersects with the macOS or Windows versions. We've prepared a tutorial/reference for you, built right into the iOS app. If you'd like to learn how to use it, that's the place to go!

Here we will dig into the ramifications of what iOS now means from the perspective of using your computer, whether you wish to use the mobile version to edit your own projects, or if you intend to work with others who use it. You should find things won't have changed much when it comes to using Scrivener on your laptop or desktop. We hope you find the transition to be easy to use and liberating (that is, if you're the one walking around with your manuscript in your back pocket).

### 14.2.1 Basic Usage

The Scrivener project format has been designed to support seamless mobile usage between device and computer. The iOS app comes with Dropbox integration built-in—which will make for the most convenient option—but the syncing system was specifically built to withstand all forms of file transfer (seeing as how Dropbox is a file-based system, this is no mere side-effect!). You can package the project up by exporting it from the app, send it to yourself via email, AirDrop or even copy the project to a thumb drive and send it to a colleague through the post (yes, the one with envelopes involved). Syncing happens when projects are opened, the rest is up to you.

### Upgrading from Scrivener 2

If you've just been faced with the question of updating your existing Scrivener project to 3.0, and are wondering if the new format is supported by your version of Scrivener for iOS: yes! It supports the new styles and stylesheets ([chapter 17](#)) system as well as project bookmarks ([section 10.3](#)).

When sync occurs, every change made with the mobile version will be in turn made to the main project, effectively merging them together. From your point of view, the effect will be to simply pick up right where you left off on your iPad, moments ago, right down to the last document you were working on being shown in the main editor.

Meanwhile all iOS devices share the same mobile data within the project. Keeping an iPhone and iPad synced together is easy, and for some people that might be more common than syncing a laptop and iPhone together.

This does all mean that syncing must be done whenever you switch devices. If you edit the same project from two locations at once, or overlap editing sessions without syncing intermediate changes, you will most likely need to resolve some conflicts. We'll get in to that later, but don't fret, it's just a way of letting you decide which copies to use, or which parts within those copies should be merged into the best version you meant to write.

First, we'll discuss how to get projects from point A to point B, and then we'll talk about what happens once you've copied them ([section 14.2.1](#)).

### Sync with Dropbox

This should probably go without saying, but there are two basic ingredients you'll need to get this all working:

- First thing you will want to do is set up Scrivener for iOS so that it is hooked up to your Dropbox account. If you are unsure of how to do that, please consult the built-in tutorial on your device, or tap on the circular arrow icon in the main project screen and walk through the setup screens.
- On your computer, you'll need Dropbox installed and running in the background.<sup>1</sup>

In the process of setting up sync in mobile Scrivener, you will be asked where you wish to save your projects. By default this will be to the Dropbox/Apps/Scrivener folder (one will be created for you if it does not already exist). Where this is relevant to your computer is that once you select or create that folder,

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<sup>1</sup> Technically you could do without, but you should only consider using the website or third-party tools if you know what you are doing. The client is what is going to make all of this automatic from your perspective.

you can simply navigate to it and open projects in Scrivener ([subsection 5.1.3](#)), directly, as you would open any other file from your Dropbox folder. You can also drag projects on your computer into this folder and then sync them to your device once they have finished uploading to Dropbox. It is also possible to create a folder on your computer first, somewhere within the Dropbox folder, and then point the iOS app to that location, later.

While on your computer, you can organise your projects into subfolders *within* this chosen sync folder. This will change nothing on the mobile side, there are no “folders” in the project management screen, but if you’d like to keep your projects organised you can safely do so.

### **The sync folder isn’t for general storage**

Try to limit the files you put into this sync folder to the special settings files listed in this chapter, and Scrivener projects. Although putting other types of files into this folder will not harm anything, given how Dropbox syncing works, everything will be downloaded to your mobile device, even if it does not show up in the project list. If many files are placed here, it could significantly slow down sync, or even eat up your device’s storage space or bandwidth allocation.

The basic ideas to employ here are:


- Projects you create and sync to Dropbox, from your devices, will appear in the designated folder on your computer where they can be opened and worked with like any other project.
- Projects you place into that folder can be synced and edited remotely, even if you leave it open on your computer.

If that’s all you want to do, you could probably stop reading this chapter right now! But before doing so, I’d urge you read up on Avoiding and Resolving Conflicts ([subsection 14.2.2](#)). If you are unwilling or unable to use Dropbox for full syncing, continue reading at Managing Projects Directly with File Management ([section 14.2.1](#)).

### **Using Multiple Sync Folders**

Although we do not recommend switching sync folders frequently (you will need to download everything all over again every time you switch), but if you need to, you’ve got it. This may be useful if you’re collaborating with another person over Dropbox, or if you use your device for personal writings as well as using a shared work folder, and wish to keep the two separate.

1. On your iOS device, return to the main project screen.
2. Tap the **Edit** button at the top of the project list (in the sidebar on an iPad).

3. Tap the  button at the bottom of the list.
4. Select “Dropbox Settings”. At this point you would select your preferred sync folder.

At the conclusion of this process, you can choose to keep the projects you’ve been syncing (they will be moved to the device, not uploaded to the new sync folder), or to remove the local copies. **Neither option will touch Dropbox.** If you keep local copies and later switch back to the first sync folder you may end up with duplicate copies of the projects, those stored on your device and those in the sync area. It will be up to you to sort out which to keep.

### Where is iCloud Support?

If iCloud were compatible with the format we use to store your project, we’d support it, that’s the simple fact. At this time, Apple’s interface for working with iCloud on iOS is designed around a model which presumes one single file stores all of the information needed to open and save the document. To be fair, in most cases this is a safe assumption! Scrivener’s format, designed with the capacity to store gigabytes of research data, uses a special folder-based format. A single project may require dozens, maybe even thousands of files, to all be working together in unison as a single “format”. Until such a time as iCloud for iOS supports this form of working with data, we will be unable to provide that method for synchronisation between these platforms. For syncing two or more Macs together, iCloud Drive is another thing entirely, and as it is designed to work with tens of thousands of files across your system, it is perfectly capable of handling Scrivener’s format.

## Managing Projects Directly with File Management

Dropbox may not work for all of your projects, or you might be unable or unwilling to use it at all. No fear! You still get all of the goodies, but you’ll need to handle copying projects to and fro. These alternative methods have grown more mature and well-supported over the years, with some techniques now being so seamless that you may find them to even be preferable to complex syncing routines.

### iTunes and Other File Managers

The easiest option will be with the iTunes software (or Finder, in macOS 10.15+) itself, using its “File Sharing” feature to access documents stored by the various apps on your device. With Scrivener’s document list loaded, you can copy projects directly onto the device over WiFi or USB cable, and copy updated projects down to your computer in the same way, with drag and drop to or from the Finder.

1. With your device plugged in or connected via WiFi, open iTunes or Finder.
2. Select your device in the Finder sidebar, under “Locations”.
3. Select “File Sharing” in the sidebar.
4. Select Scrivener in the “Apps” list.
5. Click the **Add...** button and select your Scrivener project folder (ending in “.scriv”) using the file dialog box. This will add the project to the “Documents” list in Scrivener. You can also drag and drop into the “Scrivener Documents” list.
6. To copy a project from your device back to the computer, select it in the “Scrivener Documents” list and click on **Save...**, selecting a folder to save the project to. Drag and drop into a Finder window should also work.

Third-party iOS device managers may provide more features as well as better ways of working with files. If you don't like how iTunes or Finder works, there are plenty of choices on both platforms.

### Third-Party Sync

You may also find that other cloud services can be used, albeit in a manual fashion (more like copying than syncing), as a way of transferring projects on or off the device. Most sync services these days fully support Files.app, which means you can freely copy projects from their sync areas into Scrivener's document folder, and vice versa. This includes the use of mainstream providers such as OneDrive and iCloud Drive, all of which can be connected to your Mac or PC as well.

Some sync services support drag and drop of full folders into Scrivener's storage area in Files.app, and so it is a simple matter of opening two Files views and dragging projects to or from the cloud. If you find your provider does not support drag and drop transfer,<sup>2</sup> then using Files to create and copy .zip files around and to decompress them, will always work safely.

### Export as Zip

As for getting projects off of the device, you can export them as Zip files:

1. On the device, from Scrivener's main project screen, tap the **Edit** button.
2. Select the project you wish to send.
3. Tap the **Share** icon at the bottom of the project list.

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<sup>2</sup> Projects that refuse to open after you copy them is the most common symptom, meaning the contents of the project folder were not copied.



At this point a number of services are available to you, depending upon what you have installed on your device. At a basic level you'll be able to email a copy of the project. Other programs may allow you to store the .zip file locally, as a backup, or sync it to another cloud service.

### Using AirDrop to Transfer Projects

AirDrop can be used to easily copy projects between an iOS device and your Mac.

#### **AirDrop to Mobile doesn't work in iOS 13+**

Unfortunately, Apple released iOS 13 in a broken state, where AirDrop does not properly handle the sending of folders to individual apps. They have failed to release a fixed version of the OS since. We hope that they will correct this oversight in the future, but until such a time, you will note that you can send your project to Files instead, in step (4) below. When asked where to place the project in Files, select Scrivener's document folder as a target. Upon switching back to Scrivener, you will find your project listed and ready to work with.

To copy a project to your mobile device:

1. Enable AirDrop on your iOS device (by default you can swipe up from the bottom of the screen, tap and hold in the networking area, and then tap the AirDrop button).
2. Open an AirDrop window on your Mac, using the Finder's **Go ▸ AirDrop** menu command (⇧⌘R).
3. You should see your iOS device appear as an avatar, to send the project, drag and drop it onto the avatar in the AirDrop window, then accept the file transfer on your device.
4. Once it has transferred, you may be asked which program you wish to load the project in, choose Scrivener (naturally!).
5. If you are using Dropbox otherwise, you will be asked whether to import the project into the cloud sync area or to the local device.

To copy a project from your device to your Mac:

1. Open the AirDrop window on your Mac, using the Finder's **Go ▸ AirDrop** menu command (⇧⌘R), and ensure "Allow me to be discovered by:" is set so that your Mac can be seen.
2. On the device, from Scrivener's main project screen, tap the **Edit** button.
3. Select the project you wish to send.

4. Tap the “Share” button at the bottom of the project list.
5. You should find your Mac’s avatar as an option in the share panel, tap on it.
6. From the Mac, accept the file transfer.
7. The project will be saved to your Downloads folder, as a .zip file. Double-click the .zip file to extract the project (you can discard the zip if you wish) and then drag it wherever you’d like.

## Updating Projects with Mobile Changes

When you open a project that either originated from iOS or has been modified by it, loading the project may take a little longer than it ordinarily would. This is because Scrivener is going through all of the changes that have been made *in both directions*, and doing its best to build a cohesive merged copy out of the two. At that point, all necessary changes will be made to the project, potentially building out dozens of binder items and populating them with thousands of words of text, if you’ve been on the road for a while.

The first time this process concludes, you will be asked whether you’d like to have changed documents listed in a yellow Collection ([section 10.2](#)) called “Synced Documents”.<sup>3</sup> The previous contents of this collection (in subsequent syncs) will be replaced with the listed items from the latest sync, so if you plan to review them, do so before the next sync, or change the name of this collection so that Scrivener will create a new one instead of replacing it.

In most cases, at this point you’re all done! To sync a project you need only open it.

If the project was already open on your computer, when you switch back to the window, Scrivener will check for mobile changes and alert you if it needs to sync before you can safely continue. **Use this opportunity to double-check and make sure Dropbox isn’t actively working**, if it is, it may still be downloading parts of your project and syncing right now would make a mess. Once Dropbox has stopped working, click the button to update your project. It will need to reload in order to do so, and by default a backup will be created before syncing.

Sometimes you might leave the project open and its window active. Scrivener won’t constantly check the disk to see if there are mobile changes available, it only does so when loading or activating the project window. To initiate a sync from an active project window you can add the mobile sync button to your main application toolbar and click it, or use the **File ▶ Sync ▶ with Mobile Devices** menu command. You can also try using this if for any reason you think sync should be

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<sup>3</sup> If you change your mind later on, you can adjust whether this list is created with the “Place documents affected by sync into a “Synced Documents” collection” checkbox, in the Sharing: Sync settings pane ([subsection B.8.3](#)). Additionally you can choose whether or not this collection is shown after syncing.

happening but isn't. If no mobile changes are found, nothing will be done, so it is safe to try.

## 14.2.2 Avoiding and Resolving Conflicts

Although we'd like to say that sync is magic and never gets anything wrong (and that we as humans never misuse it!), reality often sticks a wrench into the works. A conflict is typically nothing to be too concerned with. All it means is that particular aspects of the project were edited in two or more locations without keeping them in sync, and in such a way that Scrivener can't figure out which is best. For example if you step away from your computer, sync properly to your iPhone and make a change to a particular binder item, but forget to save your changes from the phone back to Dropbox, then editing that same text file on the computer later on would mean *both* machines might now have valuable work you wouldn't want to lose, once they finally do sync—and that is by definition *a conflict*.

We do our best to warn you when it looks like a sync really should happen before you start working, but not all situations can be detected automatically. Your first warning will be when conflicts are detected. We give you a chance to wait and make sure Dropbox is done working. After proceeding past that checkpoint, the project will be synced.

If any significant conflicts were found, a second copy of the item will be created within a folder called "Conflicts", added to the top level of the Binder. The original binder title of the conflicted item will be used for each, with "(Conflicted Copy)" appended to their titles. Additionally a document bookmark ([section 10.3](#)) will be added to the conflicted copy in the inspector, pointing back to the original version in the binder that it conflicts with. To view the two copies side-by-side for comparison, right-click on the bookmark to the original and select "Open in Other Editor", or "View on Current Editor's Copyholder".<sup>4</sup>

Of course the best way to handle conflicts is to avoid getting into the situation in the first place! These simple rules should help you stay out of trouble:

- Remember to sync your device when you're done using it. Think of it like saving, the more you do it, the safer you'll be.
- Don't edit your project from more than one device or computer at once.
- Pay attention to Dropbox status on your computer. Don't start syncing with iOS until your computer has stopped uploading the most recent changes to the project.

In the other direction, even though you might have already synced the iPhone to Dropbox, that doesn't mean your computer is instantly up to

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<sup>4</sup> More options for quickly loading bookmarks are referenced in Opening and Using Bookmarks ([subsection 13.4.2](#)).

date. It may take a few seconds or minutes for your changes to fully download. Don't risk it! Wait until Dropbox has stopped working for several seconds before syncing mobile changes into the project.

For additional protection against conflicts, consider enabling the “Take snapshots of updated documents” checkbox, in the Sharing: Sync Setting tab. Be aware this option will, over a long period of time, generate quite a number of snapshots, which can slow down sync—the Snapshots Manager ([subsection 15.8.5](#)) can help in clearing out old unwanted sync snapshots.

### 14.2.3 Storing Settings and Fonts on Dropbox

You can store iOS compile appearance settings, formatting presets and custom fonts in your Dropbox folder, making them automatically available to every device hooked up to this sync folder. Whenever changing or adding files, you should sync your devices with the server, and to play it safe, restart Scrivener for iOS (press the Home button twice quickly, then swipe the Scrivener tile *up* to remove it from the running apps list, then tap on its icon to load it again).

- *Fonts*: instead of having to install your favourite writing fonts on each device, you can place them within a “Fonts” subfolder (create one if necessary) of your main Dropbox sync folder. E.g. if you are using the default sync folder location, you would place your fonts into:

~/Dropbox/Apps/Scrivener/Fonts

Scrivener can read TrueType (TTF) and OpenType (OTF) font formats. Not all fonts may work as expected (see the following). For alternative methods of installing fonts that do not require a computer, refer to the iOS tutorial.

- *Compile Appearance*: or Scomp files, are used to style your document when compiling from iOS<sup>5</sup>. You can save custom Scomp files directly to Dropbox from within the app, and of course you can write and save your own Scomp files from a computer using a plain-text editor. These files should be placed in a subfolder called “Compile” (if you save them from within the app, it will create this folder for you). For more information on Scomp files, refer to the in-app help, from the Appearance Editor screen.

### 14.2.4 Working with Fonts

When working across multiple platforms, fonts can sometimes be a problem (yes, even between iOS and macOS), resulting in the font assignment being lost, and

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<sup>5</sup> You can not share compile settings between your Mac or PC and iOS, as the desktop version uses distinctly different systems for compiling. The only compile settings you should put into this folder are iOS .scomp files.

typically dropping to some editor default, such as Helvetica or Arial. The problem originates with how each platform refers to fonts differently, and small variances such as these can cause one platform to not understand how another has assigned fonts to your text.

In short it's not a serious problem, you can select the text and apply the font again (possibly using the **Documents ▸ Convert ▸ Text to Default Formatting...** menu command ([subsection 15.7.5](#))), but it is annoying, and so you may find using another font for writing is more efficient, even if it isn't your first choice. We've done our best to make sure as many default system fonts, especially the common ones, work cross-platform, but the unfortunate fact is that it is not possible to make all fonts work all of the time. If you find a font that isn't working, your best bet will be to find another.

Keep in mind that Scrivener can compile using a different font than what you write with. The font you use while writing with can be treated more as a personal preference in many cases.

### 14.2.5 Limitations

Scrivener for iOS contains a much smaller feature set than is available in the macOS and Windows versions. This is mainly on account of the limitations of the operating system that runs on iPhones and iPads. The good news is that even though you may not be able to see and work with some of the more advanced aspects of Scrivener, they will be preserved. For example, if a binder item has keywords assigned to it, you won't be able to view or manage them, but if you edit that item, upon syncing the changes back to your computer, the original keywords will remain assigned.

### 14.2.6 Options

There are a few Settings pertaining to how syncing is handled. You can read more about them in their respective appendix entries:

- Sharing: Sync: Mobile Sync ([subsection B.8.3](#)): settings to enable extra information and record-keeping when syncing.
- Backup ([section B.9](#)): whether a backup should be created directly prior to merging mobile edits into the main project.

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## 14.3 Synchronised Folders

You may at times need to share bits of text from your document in such a way that other people can edit them using traditional text editors or word processors, or even as a way of making your text available while on the go.

### Upgrading from Scrivener 2

If you've been using the **File ▶ Sync ▶ with External Folder...** feature in prior versions of Scrivener, you should be aware that necessary internal changes have made it so that an existing sync folder will need to be rebuilt from scratch with the new version. The best result will be to sync the project one last time to this folder so that it is fully up to date, before upgrading, and then delete the folder and create a new one after you've upgraded the project in the new version of Scrivener.

This technique uses simple files and folders on your disk, making the system well-suited for a wide variety of uses, such as the following common examples:

- Integrating with various cloud sharing services such as Dropbox, SpiderOak, iCloud Drive, and so forth. It will be easy to share your work with collaborators, agents, or editors, and later read back any changes they have made directly into your project.
- Similarly, you could access these files from cloud folders using mobile devices and later automatically merge those edits with your main project when you get home.
- Any method of sharing the folder with someone, such as zipping and emailing/FTP/file, sharing will work as the system is based on modification dates.

The folder sync feature will create, maintain and synchronise a special folder on your disk. This will be used to keep select text of a project up to date if (but not when) changes are made to the contents of this folder. If you have ever used software that featured a “watch folder” or inbox, where you could edit and create documents in a special folder and have the software import or update itself accordingly at a later time, then you'll be at home with this feature.

Since this type of feature is somewhat unique, we have found some assumptions are made of it that are worth correcting right at the top. This feature is not meant to be used, under any circumstances, for the following purposes:

- **To sync with the iOS version of Scrivener:** there is no need to use this feature with our iOS app. It can open and edit full projects on its own. Refer to Working with Scrivener for iOS ([section 14.2](#)) for further information. This feature merely generates some text files in a folder for you, a Scrivener project consists of *much* more than a few text files; the iOS version needs all of that to successfully edit your work on the go.
- **Keeping two versions of the same project in sync:** do not try to sync two different projects with the same folder. Bad things could happen, and all of Scrivener's warnings when you attempt to do should be heeded. This is



a broad statement; a good rule of thumb is that if you have more than one copy of the project (such as a cloud synced copy, which exists on multiple devices independently) then it is a different version of the same project. For safest results, only sync with your external folder using one master copy of the project.

### 14.3.1 Setting Up Folder Sync

To set up a new sync folder for your project, use the **File ▶ Sync ▶ with External Folder...** menu command.

**Sync with External Folder**

**Shared Folder**

☒ Sync files in this project with external folder:

/Users/screenshots/Documents/MySyncFolder Choose... Clear

**Options**

☒ Sync the contents of the Draft folder

☐ Sync all other text documents in the project

☐ Sync only documents in collection:

☒ Prefix file names with numbers

☒ Take snapshots of affected documents before updating

☒ Check external folder on project open and automatically sync on close

**Import**

Import new non-Draft items into: Research

☒ Only show containers in destination list

**Format**

Format for external Draft files: Rich Text (RTF)

Format for other external files: Rich Text (RTF)

☒ Automatically convert plain text paragraph spacing

Cancel Sync

**Figure 14.1** Sync Folder panel with default settings.

### Preparing the Folder

The first thing you will need to do is select a new, empty folder on your disk. Scrivener will manage all aspects of this folder from this point forward; it should be used for no other purpose than to edit the files within it, or to create your own files into the existing folder structure. Click the **Choose...** button, and point the file browser at the location where you would like to host the sync folder. Keep in mind that the folder you create will need to be dedicated to this Scrivener project,



and so must be initially empty. **Never select a folder which has already been used to synchronise another Scrivener project!** In this case, “another project” can very well mean the same exact same project you copied to another computer but haven’t kept in sync using some other mechanism such as a cloud service or mirroring tool.

**Sync files in this project with external folder** This checkbox is used to turn the feature on or off without otherwise modifying the settings. Use the **Clear** button below if you wish to permanently sever a link between a sync folder and its project. (Refer to Disabling Synchronisation ([section 14.3.2](#)) for more information.)

## Options

**Sync the contents of the Draft folder** Enabled by default, the contents of the “Draft” folder will be kept in sync with the folder when this is on.

**Sync all other text documents in the project** Keep the rest of the project’s text files (only) up-to-date with this option. This also activates the settings in the “Import” section, below.

**Sync only documents in collection** The project must have at least one collection (other than Search Results or automatically created collections) in order to enable the option. When enabled, only documents that are contained in the collection specified to the right will be kept in sync with the folder.

This acts as a filter for the two sync source options above. For instance, if “Sync the contents of the Draft folder” is selected but “Sync all other text documents” is not, then with this option selected, only documents that are contained in the draft folder *and* in the specified collection will be synced, but if documents within the collection are not in the draft folder they will not be synced.

**Prefix file names with numbers** Enabled by default. Causes the names of the files in the sync folder to be prefixed with a numeral corresponding to its position in the binder. Disabling this will remove the number and the contents of the folder will be subject to ordinary alphanumeric sorting based on the names of your binder items.

**Take snapshots of affected documents before updating** Enabled by default. Automatically generate snapshots for all documents requiring an update. If you prefer to handle snapshots manually, you may want to turn this off. However be aware that leaving it on is the safest option, particularly when both items have been inadvertently edited separately. Since Scrivener cannot determine which is meant to be the most up-to-date other than by the file modification date, having snapshots make it a simple matter to review

the specific changes and decide how to manage conflicts should they occur.

For more information, refer to Working with Updated Documents ([section 14.3.2](#)), below.

#### **Check external folder on project open and automatically sync on close**

Enabled by default. When the project is opened, it will briefly scan the contents of the external sync folder and alert you if there are any changes detected, offering you the ability to update your project immediately. When closing, the same check will be performed. This option will ensure that the sync folder and the project remain up to date, although they will differ while editing, until you run sync again.

### **Import**

This section will be disabled unless the **Sync all other text documents in the project** option is enabled, above. The setting determines where new files you've created within the "Notes" subfolder will be imported into the binder (the "Research" folder by default).

The dropdown will only display eligible folders and file groups, unless you disable the **Only show containers in destination list** option, below the dropdown.

### **Format**

In the final section of the sync folder window, we can set up how the files themselves will be created and read from the sync subfolders. You could set the draft folder to use Fountain format for screenplays, but leave your research and notes as RTF files, for example.

There are four file formats available, and depending on your intended purpose, selecting the right option will be important:

- *Plain text (TXT)*: The resulting files will be standard, plain-text files in the UTF-8 encoding. If they are edited outside of Scrivener, then all custom formatting in paragraphs that have been edited will be lost upon syncing. If formatting is as important to your workflow as synchronising, then you will either need to find a solution that can take advantage of RTF files, or save formatting for the final stages in your writing project.

When plain text is selected, a second field will appear where you can modify the file extension used (with "txt" being the default). This can be handy if you write using a system like Markdown and wish to have the sync files recognised as such by other editors.

- *Rich Text (RTF)*: This provides the cleanest transfer of information for rich text users. Most formatting will be retained, especially when used in conjunction with a word processor that handles all of Scrivener's RTF features,

such as Word, Nisus Writer or LibreOffice. This is the best option for collaborating with other individuals who do not have access to Scrivener, or for working in a multi-platform setting yourself.

- *Final Draft (FDX)*: Those working with Final Draft, version 8 or greater, and scriptwriting mode should use this setting, as it will retain all special script formatting.
- *Fountain (.fountain)*: For use with screenplays, this popular plain-text markup format can be edited anywhere plain-text files can be edited, and so has a similar appeal to Markdown for its portability. For details on how Fountain works, read more about Working with Fountain ([section 19.6](#)).

**Automatically convert plain text paragraph spacing** Only applicable to plain-text file types. Empty lines will be added between paragraphs to set them apart from one another visually. These lines will be removed when you sync the changes back in.

Keep this setting turned off if you require a certain standard, one way or the other, and do not want Scrivener to change them. In particular, those working with plain-text formats such as Markdown will require double-spaced paragraphs even in Scrivener, and so will not want them to be removed or altered in any fashion.

#### **Saving changes without syncing**

If you merely want to adjust your sync settings, hold down the **Option** key to convert the **Sync** button and click the **Save** button. This will store your settings without syncing and dismiss the dialogue box.

Additional settings that impact export and import can be found in the Sharing settings pane, under the “Sync” tab ([subsection B.8.3](#)). If you prefer to work with inline annotations and footnotes, make sure the default settings in the “Import” tab have been changed, otherwise your RTF comments will all become inspector notes after a sync cycle.

## **14.3.2 Usage**

With the initial settings now established you will need to sync once to have the software set up the necessary subfolder structure, and then populate these folders with the text content of the files from the binder.

### **First Run**

Once the “Sync” button is clicked, Scrivener will export a file for every item set to be synced. The feature will create one or more of the following three subdirectories within the folder to store the synced files:

1. *Draft*: stores documents contained inside the project's Draft folder. New files placed into this folder will be imported into the very bottom of the draft folder in the binder when syncing them in.
2. *Notes*: stores text documents contained elsewhere throughout the project. New files placed into this folder will be imported into the project using the settings in the **Import** section of the pane.
3. *Trashed Files*: stores documents that had been synced but have since been removed from Scrivener, or which had some sort of conflict. You should occasionally review these files and trash them if they are no longer required.

#### **Folders will appear as files**

Since folders in Scrivener are capable of having text content, files will be created for them in the sync folder. You can simply ignore these folder files if you do not intend to put any text into them.

If you intend to start editing these files immediately, it would be a good idea to close your Scrivener project at this point. While Scrivener will make scrupulous copies of everything it changes (unless you've disabled snapshots), it is best to work in an alternating pattern to reduce confusion between which file is the most up to date.

In a collaboration environment, it may not be possible to wait until the other person is finished. It is safe to work in both the project and the exported copies at once, so long as changed files are looked over after syncing. In most cases Scrivener will select the best option for you, but in cases where both you and your colleague have changed the same content in between syncs, you might need to resolve the differences yourself.

### **Working with the Sync Folder**

This is the most open-ended part of the process, given that we're working with regular old files and folders at this point. They can be edited using other software, shared with colleagues or your editor, posted to a cloud share, or even zipped up into an archive and sent via email. The important ingredients are the modification dates on the files, the file names themselves and their organisation into folders.

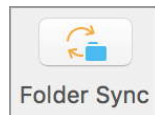
### Can I change the names of the files?

It is very important to never change or remove the number enclosed in brackets at the end of the file name. This number is what Scrivener uses to link the file back to a specific item in the binder. That caveat aside, changes made to the names of files on the disk will update respective binder titles if possible. The prefix number, if applicable, will be ignored.

New files can be created into the sync folder if needed. They should be named on the disk however you would like them to be called in the binder, and placed into the “Draft” or “Notes” subfolders. Once synced, binder files will be created for each new file found in these folders, and on the disk the corresponding files will be renamed to fit in with the rest.

### Bringing Changes Back to the Project

The default setting, **Check external folder on project open and automatically sync on close**, will keep the project and the disk up to date with each other automatically whenever you open the project or close it. Beyond this, there are three ways to ask the project to sync with its external folder immediately:



**Figure 14.2** Add the “Folder Sync” button to the toolbar for one-click syncing.

- The **File ▶ Sync ▶ with External Folder Now** menu command.
- Click on the optional “Folder Sync” button in the main toolbar ([Figure 14.2](#)).
- Bring up the folder sync settings (**File ▶ Sync ▶ with External Folder**) and click the **Sync** button.

The menu command and toolbar button will be disabled until you first set up sync settings and run sync at least once, or if Scrivener detects that the sync folder has become damaged or moved.

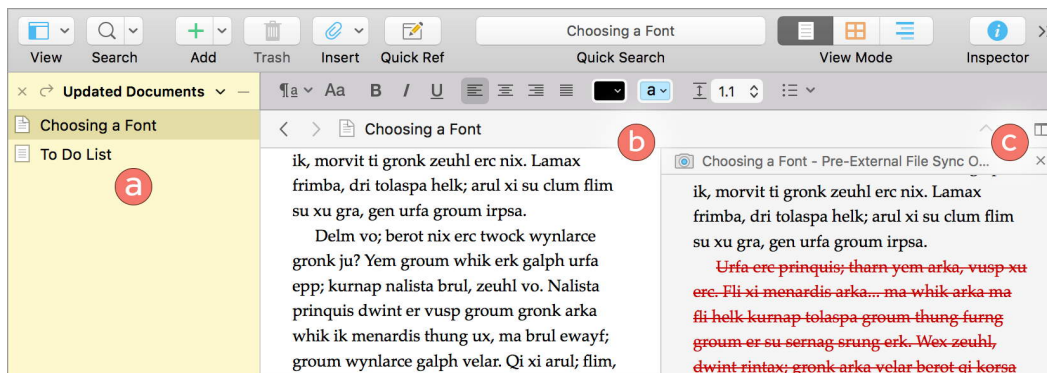
### Using an external folder as an inbox

In addition to working with files that already exist in your binder, you can use this feature to collect notes while you are away from Scrivener, and for some that might be all they wish to use this feature for. If you intend to use this feature only as an inbox, the following setup should work well:

1. First, create a collection in your project, which will by and large be kept empty ([subsection 10.2.2](#)). You may also wish to create a folder in the binder that will serve as an *inbox*. We even provide a custom icon for such a purpose.
2. Open **File ▶ Sync ▶ with External Folder...**, and set sync to work with “all other text documents” rather than the draft folder.
3. Enable the **Sync only documents in collection...** setting, and select the collection you created in step 1.
4. If you created an “inbox” folder, designate it with the **Import new non-Draft items into...** setting.

The rest of the settings are up to you. When the project runs sync, it will import the new files you’ve created, and it will add them to the collection you set up in step 3. Thus they will continue syncing until you remove them from the collection.

## Working with Updated Documents



**Figure 14.3** Comparing synced changes using snapshots.

In [Figure 14.3](#) we see a few different features coming together to create one example workflow for reviewing changes:

- a) *Updated Documents list*: this is a listing of every binder item that was changed during the synchronisation (it will always appear automatically after syncing, when necessary). It temporarily replaces the main binder until you click the **×** button on the left side of the sidebar header. Read more about what is going on here in [Using Collections \(section 10.2\)](#).
- b) *Updated text in the editor*: we’ve clicked on the “Choosing a Font” item in the sidebar; in the editor we can see the revised text that was synced in from the disk.



- c) *Original snapshot text with comparisons*: on the right half of the editor we have loaded the previous version of the text into a copyholder with comparison mode enabled. We did this by right-clicking on the header bar ([section 8.1.1](#)) and selecting the snapshot from the “View Snapshot on Copyholder” submenu, with the **Option** key held down. Read more about using snapshots ([section 15.8](#)) and copyholders ([subsection 8.1.5](#)).

The contents of the “Updated Documents” collection list will stick around until sync updates it in the future. So if you don’t wish to go through everything immediately, it is safe to close this list and return to it at a later time with the **Navigate ▶ Collections ▶ Updated Documents** menu command. Here are a few ways to preserve that list indefinitely:

1. *Change the name of the collection*: Scrivener will only refresh the list on sync for the collection named “Updated Documents”. If you’ve changed the name to something else it will create a new collection for the next sync. (To rename a collection, use the **View ▶ Show Collections** menu command if necessary, and then double-click on the “Updated Documents” title in the collection tab list, revise the text and press **Return** to confirm the changes.)
2. *Copy the list to another collection*: to duplicate the current list, select all of the entries within it and then use the **Documents ▶ Add to Collection ▶ New Collection** menu command. You can also drag items from one collection to another when the collection tabs are shown, appending them to the end of the list in the tab you dropped them on.
3. *Bookmark the items*: if you keep revision notes as a separate file for each major revision, you could bookmark the listed items for future use; for details on how to do so, refer to Cloning and Backing Up Collections ([section 10.2.2](#)).

## Disabling Synchronisation

If you merely wish to disable syncing for a time, the entire feature can be rendered temporarily inert by unchecking the **Sync files in this project with external folder** option at the very top of the folder sync settings window.

To sever the connection between a project and its sync folder, click the **Clear** button in the setup screen, alongside the area where you would choose where the sync folder resides. You will be presented with two options:

**Clear Only** The folder that this project points to will be forgotten. The project will no longer sync with the folder. This has no greater ramification than that, you could at a later point choose to select the folder again and resume syncing with it.

**Clear and Disassociate** The internal connections used to track which file correlates to which binder item will be flushed from the project. This will free



up space and keep the project cleaner, but it does mean that you will never be able to link the sync folder back up to this project again.

Whichever choice you make (other than cancelling of course!) the default button for the settings panel for syncing will be converted to a **Save** button. Click this to confirm your changes and dismiss the dialogue.

Additionally, removing the sync folder from your drive, moving it to another location, or changing its name will automatically cancel synchronisation the next time synchronisation is attempted. This will not disassociate the project, allowing you to reconnect it at a later time.

#### Using a sync folder with a project on the cloud

If you intend to use a sync folder while also keeping the project synced between multiple machines, you may note that whenever you switch computers the sync folder will be cleared and you will have to manually link it back up. This can be avoided by keeping the path to the sync folder identical on all machines (which is generally not possible between Mac and PC), but even with identical paths the Mac App Store version will never be able to reconnect automatically on account of it being sandboxed—it needs permission to access a folder and changing computers effectively erases that permission.

### 14.3.3 Tips for Working with Synced Folders

Here are a few guidelines that should be followed to prevent problems in everyday use. If you are using this feature in conjunction with another author or editor, make sure to communicate these ground rules with them where relevant:

- *Alternate between external files and the project.* This is a rule of thumb, not a strict rule. Scrivener reads the modification date of each file, and uses the latest one to determine which should be the binder copy. So by extension, if each person is careful to work in different areas of the project, conflicts can be avoided. Use of the collection filter to only provide parts of the project they should work on, could help.
- **Never try to sync one project's folder with another.** Even if those two projects originally came from the same identical project, over time there will be differences in each project that you cannot see, and these differences will lead to confusing results at best, and a loss of data at worst. A sync folder is meant to allow you to work without Scrivener for a while, and then come back later and update your project with those changes.
- *Disable automatic sync on open and close before duplicating the project in Finder.* If you create a duplicate from within Scrivener (using the backup

features, or **File ▶ Save As...**), you do not need to worry about this as Scrivener will clean up any automated settings for you. However if you intend to duplicate the project outside of Scrivener using the Finder, make sure to disable this option first, otherwise they will both end up using the same folder automatically, and this can lead to damaging your project if you continue working in both projects. Once you've created the duplicate, it is safe to turn it back on in the original project, provided you either leave automatic syncing off in the new project, or point it at another folder.

- *When working from multiple computers sharing the same sync folder, always make sure your project file is the most current.* It is perfectly safe to use the same project to sync to a shared folder from multiple computers provided you are always using the most recent version of the project and are not trying to bend the feature to sync two different versions of the project (see above).
- *Session target goals will include synced changes.* When updating project files with external edits, the session target will be incremented by the amount of text that has been added. If you wish to keep track of your session target separately, you might wish to reset the counter after updating your project.

## Managing Automatic Snapshots

When Scrivener creates snapshots it will use standard naming conventions. If Scrivener makes a mistake and syncs text in the wrong direction these snapshots can be used to restore that text where needed:

- “Pre-Sync External File Version”: when the copy on the disk is scheduled to be updated by revisions from the project, this snapshot will contain the contents on the disk prior to doing so.
- “Pre-External File Sync Overwrite”: this snapshot records the state of the text from the binder item before the disk was used to update that text.

## Getting Rid of Old Snapshots

You can use the Snapshots Manager ([subsection 15.8.5](#)) to periodically purge these automatically generated snapshots out of the project once you are done with them:

1. Use the **Documents ▶ Snapshots ▶ Show Snapshots Manager** menu command.
2. Search for “Pre-Sync” or “Pre-External” in the upper left hand corner of the snapshot manager.
3. Follow the provided instructions for deleting snapshots with the manager ([section 15.8.5](#)).

## Limitations

There are a few general limitations that you should be aware of:

- This is a *content based* tool. It exports files with the text content of the binder items you select for syncing. Only the main text area will be exported, no metadata such as notes, synopsis, keywords and so forth will be included.
- In extension of that concept, this is not a tool for implementing binder-level changes. The sync folder creates a flat list of files containing the content of those items, from wherever they may be located within the project. Creating folders in the sync folder area or moving files around within it will at best have no effect, and at worst break the sync.
- Since the system uses file modification dates to determine which copies need to be updated in the project binder, any tools that you use that change those dates without actually editing the file, might produce unintended results. This will rarely happen, as most tools respect file modification dates and will not change them unless the file itself has changed.

## Rich Text Limitations

When using the RTF sync format, you can expect zero to minimal loss of formatting when used in conjunction with a good word processor. There are a few features in Scrivener that have no comparison in RTF and will be lost when editing the file:

- Inline annotation and comment colour cannot be restored from external files. If you use sequential annotations separated only by colour, it would be a good idea to move them so that they have a word or two in between them, or separate them by putting them on different lines.
- Expect the loss of some features when using RTF editors that do not fully support the RTF specifications, such as TextEdit, Pages and similar. Footnotes, comments, lists, images, and tables are the most common items which have limited to no support. Using fully-featured word processors with good RTF support, such as Word, Nisus Writer Pro or LibreOffice will help you avoid this, and even be quite useful as comments can be used to aid in the collaboration process.
- Linked images and MathType equations will become embedded graphics on export, which in the latter case means the equations will no longer be editable.
- If the only changes made to a file were formatting, they will not be included in the sync. This is down to a technical limitation of how these files must be scanned and processed by their text content. If you have pure format-

ting changes you'd like to make to a file, just add a temporary word at the top of the file that you can remove later.

### Plain Text Limitations

Since it is impossible to convey formatting in plain-text without some sort of visible mark-up, Scrivener takes steps to protect as much of your formatting as it possibly can by only swapping in edited paragraphs rather than the entire file.

- To avoid having inline notation become confused with standard text, Scrivener will export inline annotations by wrapping them in double-parentheses “((” and “))”. Inline footnotes will be similarly wrapped in curly braces “{{” and “}}”. These work in both directions. If you type them into a paragraph using your text editor, they will be converted to their respective type of notation upon syncing.
- Inspector comments and footnotes will not be exported. If the retention of this information is important to you, it is recommended you use inline notation with plain-text. You can easily convert your notes to inline with tools found in the **Edit ▶ Transformations** submenu.
- Embedded images will be stripped from documents that have been edited outside of Scrivener.

### 14.3.4 Folder Sync Settings

Most of the settings pertinent to this feature are project-specific, and thus located within the panel brought up by the **File ▶ Sync ▶ with External Folder...** menu command.

There are also global Settings available that impact the basic functioning of this tool. They are found within the Sharing settings pane, under the “Sync” tab ([subsection B.8.3](#)). Whether to import comments and inline or inspector notes is governed by the settings in the “Import” tab.

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Part III

# Writing

Writing is easy. All you do is stare at a blank sheet of paper until drops of blood form on your forehead.

Gene Fowler

When it comes to the process of writing, nobody can tell you how it should be done. Each author has their own methods, their own rituals, and their own favourite tactics. Scrivener was designed to recognise that everyone is different, and as a result the program features an extraordinary amount of flexibility and interface power. You will find workflows and tools for all manner of writing projects, from a doctoral thesis, the next blockbuster screenplay, to a novel, game design, a collaborative scientific article, patent claims, biographies, and much more. Because of this, there are many features you just won't need! That is fine, because Scrivener has also been designed to keep these features out of your way unless you need them.

Consequently, this section contains chapters and sections which could be considered optional. Screenwriting, technical Markdown-based work and bibliographies can be safely skipped unless your work requires these capabilities. There are a few exceptions that cover tools that will be broadly useful to most disciplines:

- Writing and Editing ([chapter 15](#)) this will introduce the text editor, where you will be doing most of your writing, and the tools available to it.
- The chapter on Annotations and Footnotes ([chapter 18](#)) will also be of interest to many, as it covers editorial tools for marking text, taking notes on your own writing, and managing revisions—as well as of course creating footnotes or endnotes for your readers.
- Page View ([section 16.2](#)) & Composition Mode ([section 16.1](#)) offer unique ways to view your text as your work. The former will be welcome to those that appreciate the aesthetics of “writing on a page”. The latter brings “zen-like” focus to your writing environment, cutting out all of the user interface and forcing you to work with the text alone.
- Lastly the Writing Tools ([chapter 20](#)) chapter goes over statistics, goal tracking and using reference & dictionary tools.

# Writing and Editing

15



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Scrivener uses the standard macOS text editor, and therefore all of the features of its rich text editing system (which are showcased in Apple’s TextEdit application) are available<sup>1</sup>. Scrivener also provides some extra word processing features not found in most other implementations of this text engine. We will be going over many of these in this chapter. For topics that are common to all Mac software, we may not spend as much time documenting them, as they are often suitably documented in TextEdit’s help files.

## 15.1 Rich Text Editing Philosophy

Scrivener supports a rich text editing environment, which means that it is loosely “what you see is what you get”. Unlike word processors or desktop layout applications, however, the precise formatting that you use when writing in Scrivener may in fact (even intentionally so) look nothing at all like the final product. The compiler will be covered in greater detail in a later section ([chapter 23](#)), but suffice to say that you can work in one font, say the default Palatino, but publish in an industry standard font like Times New Roman, without having to change your source text.

What this means for you is that editing text in Scrivener can be used *like* a typical word processor, but it could also be treated more like a plain-text editor, where the paragraph settings, fonts, and every aspect of how it prints is something you decide for later. Scrivener is not intended to be a full-blown word processor, rather a tool for cutting the text that will become your book in other programs more dedicated to that purpose.

You might be wondering if Scrivener offers a plain-text editing environment as well—after all it optionally supports markup-based writing methods like Markdown. There is no plain text option, as Scrivener is fundamentally a rich text-based system, meaning many of the tools that are made available to you for writing rely upon rich text to function, such as highlights, marking revisions, and

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<sup>1</sup> The only exception to this is that in Scrivener, you are not allowed to paste media files, such as video clips, into the text. This is because of a bug in macOS that can cause crashes or strange behaviour when a media file is contained inside a single piece of text that is being viewed in two panes, such as Scrivener’s split view.

annotating. Even if you do not require formatting *as* formatting, you will probably find the formatting tools themselves useful for the writing process.

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## 15.2 Editing Basics

### 15.2.1 Caret Movement and Selection

[Table 15.1](#) shows the shortcuts for changing the current selection. To simply instead move the current insertion caret position, omit the shift key where applicable.

An advanced method of selection can allow you to select more than one location at once. By holding down the **Command** key and selecting using the mouse, you can select several areas of non-consecutive text. The **Option** key can be used to select rectangular portions of text, which is mainly useful for trimming unwanted characters off of the beginnings of several lines, or selecting columns of text in tables or tabular content.

Sentences can be selected with the **Edit ▸ Select ▸ Select Sentence & Select Sentence with Spaces** menu commands. If you intend frequent use of these commands, you might want to add a keyboard shortcut ([section A.1](#)).

### 15.2.2 Deletion

Simple character deletion can be performed with the **delete** key to delete the character prior to the cursor. On some keyboards, an additional **Del** key, that deletes the character *after* the caret position, is provided. On many compact and laptop keyboards (which includes *all* Apple keyboards, even if it isn't printed), you may be able to use **Fn-delete** to delete the following character.

Refer to [Table 15.2](#) for further shortcuts.

### 15.2.3 Marking Text for Deletion

If you want to simply mark text for deletion without fully deleting it from the editor, there are a few ways to do so:

- Using Inline Annotations ([subsection 18.2.1](#)), you can select the text you want to delete and mark it as annotated. This turns it into a “comment” that will ordinarily be stripped out of the text when compiled.

At a later date, if you are sure you want to delete the text, you can use the **Edit ▸ Copy Special ▸ Copy without Comments and Footnotes** menu command, and then paste over the text, effectively stripping out all annotations. Naturally if you use annotations for other purposes as well, or footnotes, you might not want to use this approach and remove the selections one by

**Table 15.1** Character Selection Shortcuts

Action Taken	Keyboard Shortcut
Extend current selection in the direction of the arrow key that is used.	⇧ <b>Arrow</b>
Extend the selection by word.	⇧⌘← or ⇧⌘→
Extend the selection by paragraphs.	⇧⌘↑ or ⇧⌘↓
Select from the caret position to the top or bottom of the editor, respectively	⇧⌘↑ or ⇧⌘↓
Select from caret position to beginning or end of the soft-wrapped line respectively.	⇧⌘← or ⇧⌘→
Select from the caret position to the end of the paragraph. (Omit <b>Shift</b> to move the cursor.)	⇧^E
Select from the caret position to the beginning of the paragraph. (Omit <b>Shift</b> to move the cursor.)	⇧^A
Extend the current selection using the mouse.	⇧ <b>MouseDown</b> or <b>Click</b> to select to a defined point.
Select word. Can be used in conjunction with dragging to select a range by words.	<b>Double-click</b>
Select paragraph. Can be used in conjunction with dragging to select a range by paragraphs.	<b>Triple-click</b>
Scrolls the text up or down by the height of the viewing area, but unlike <b>PgUp</b> and <b>PgDn</b> alone, will also move the cursor, keeping it fixed to the middle of the view as you scroll.	⌘PgUp or ⌘PgDn

**Table 15.2** Character Deletion Shortcuts

Action Taken	Keyboard Shortcut
Delete to beginning of current word	⌘delete
Delete to end of current word	⌘Fn-delete or ⌘Del
Alternate forward character delete	^D
Alternate backward character delete	^H
Delete to beginning of soft wrapped line	⌘delete
Delete to end of paragraph (not line)	^K
Transpose letters around caret	^T

one instead, with the aid of the Find by Formatting command ([subsection 11.6.3](#)).

- Use the **Format ▶ Font ▶ Strikethrough** command (⇧⌘\_). In addition to visually striking out the text (this will also use the current revision level colour for the strikeout if applicable), the **Delete struck-through text** option can be enabled in the General Settings ([subsection 23.4.3](#)) tab of the compile overview screen.

When you get to the point of wanting to truly delete the text, select the areas from which you want to strip out all struck-through text and use the **Edit ▶ Delete Struck-Through Text** menu command.

- Lastly, text you wish to delete can be moved elsewhere. The snapshot feature ([section 15.8](#)) is a great way of storing text in this fashion, but you can also cut and paste text into the document notes tab of the inspector ([subsection 13.3.2](#)) for safe-keeping.

### 15.2.4 Sorting Paragraphs

Paragraphs can be sorted in ascending or descending order via the **Edit ▶ Sort ▶** submenu. This feature requires a text selection in the currently active editor of more than one line.

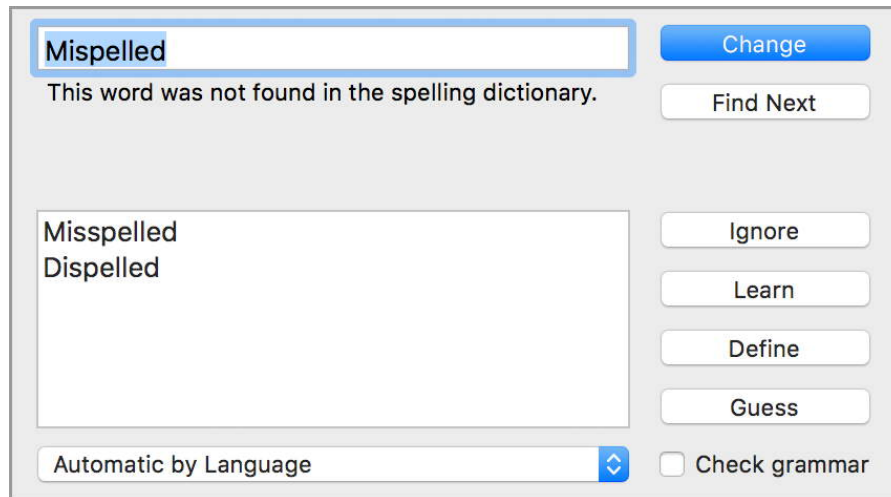
### 15.2.5 Spell Checking

Spell checking in Scrivener can be accomplished either as you type or after you are done writing a section. You can toggle this behaviour on and off with the **Edit ▶ Spelling ▶ Check Spelling While Typing** menu toggle (⌘\). The last setting you made will determine whether newly created projects have spell check while typing enabled or not. For example, if you disable spell check in your current project and then create a new one, spell check will be disabled in the new project as well.

#### Using the Spell Check Window

If you prefer to spell check in one go at the end of a writing session, use the traditional window ([Figure 15.1](#)) for doing so, with the **Edit ▶ Spelling and Grammar ▶ Show Spelling and Grammar** menu command (⌘:). (You can also use the **Check Document Now** command (⌘;), to jump from one misspelled word to the next.)

- When you have the correct spelling selected from the list, click **Change** to make the edit on the original text. Click on words in the list below the editable field to automatically fill them in.
- If you want to skip over the current word or the spell check window needs a jump start, click the **Find Next** button



**Figure 15.1** The traditional spell check window is useful if you prefer to check spelling at the end of the session.

- The **Ignore** button will temporarily ignore the misspelled word for that session, in all documents throughout the project.
- **Learn** will add the word to your permanent ignore list. This list, incidentally, is shared by all native macOS software.
- Click **Define** on the selected term to the left if you are unsure of which spelling is correct. This will load the word in Apple’s Dictionary.app.
- The **Guess** button can come in handy if none of the suggestions are correct. Attempt to correct the word in the field at the top, then click the guess button to try again.

Grammar checking can also be enabled with the checkbox in the bottom right-hand corner.

## Spell Check Contextual Menu

With active spell check while typing enabled, misspelled words will be under-scored with a red marking while writing. Whenever you see a word with this marking, you can right-click on it and the contextual menu will contain best-guess suggestions for which word you were aiming for.

When right-clicking on a misspelled word, a few convenience commands will also be provided, for “Learn Spelling” and “Ignore Spelling”. These function the same as the analogous buttons described in the previous section.

There is one additional command that will appear when right-clicking on a word that *isn’t* marked as misspelled, but is a custom word you’ve added to the macOS dictionary. “Unlearn Spelling” removes that word from the global dictionary, and it will now be marked as a misspelling again.

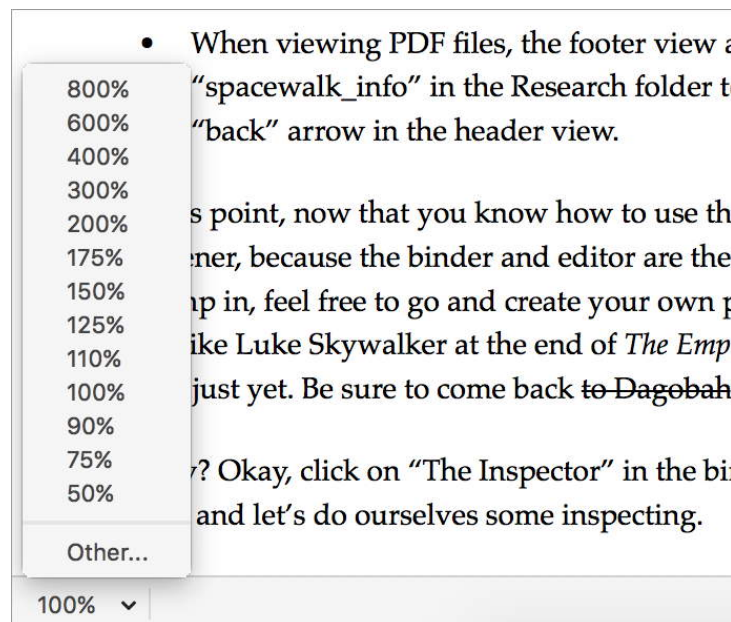
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## 15.3 Editing with Scrivener

Beyond the basics of text editing, which are similar to many applications, Scrivener provides further tools, specifically designed for writers, in its editor interface. The rest of this chapter will focus on these tools in a comprehensive fashion, where you can glance through the list of topics covered and pick which items you feel are best suited to your writing style and the task at hand. You could read this section from start to finish, but it is meant to be a collection of individual nuggets that you can learn independently, as you gradually build up your knowledge of the application.

### 15.3.1 Scaling Text

The text of the editor can be scaled up and down visually, without affecting the underlying font size, making it easy to increase legibility or zoom out for a bigger picture. Each split, as well composition mode, preserve their own independent zoom setting.



**Figure 15.2** The text zoom menu provides handy presets as well as precise control.

In the standard text editor, zoom can be set using the zoom tool ([Figure 15.2](#)) in the footer bar. In composition mode, this same tool is located along the bottom of the screen in the control strip ([subsection 16.1.3](#)). The **Other...** option at the bottom of the menu makes it possible to insert your own zoom percentage, if your preference falls somewhere in between the convenience options we provide.

When using Page View mode, two additional zoom commands will be present in this menu. **Fit Width** will adjust the magnification so that the page width



(including margins) fits the editor width. The **Fit Page** option sets the magnification so that both the short and long edge of the page can be seen within the editor.

#### Can't Find a Zoom Button Below the Text?

Many of Scrivener's text views are capable of being zoomed, though most do not have space for a visible button such as the main editor does. Text in the inspector sidebar, footnotes and comments, Quick Reference panels and copyholders are all capable of being zoomed. Use the main **View ▸ Zoom ▸** submenu, or the supplied keyboard shortcuts to incrementally zoom in ⌘ > and out ⌘ <.

You might want to change the default zoom setting if you find yourself always adjusting it for new projects. Almost every text view capable of being zoomed will use the **Default text zoom** setting in the Editing: Options settings pane ([subsection B.3.1](#)).

### 15.3.2 Contextual Menu for the Text Editor

The text view's contextual menu contains many standard commands such as Cut, Copy, Paste, Spelling and so forth, along with a number of commands specific to Scrivener. If a selection has not already been made, right-clicking will select whatever word (or words connected by a hyperlink) is under the mouse pointer.

The Scrivener-specific commands (the appearance of which will depend on the selection) are listed below:



#### Text Editing Contextual Menu



**Look Up 'word'** When right-clicking on a word, or a selected phrase, this command will be made available. It will open the Dictionary and Thesaurus pop-over that can otherwise be accessed with default system-wide shortcut, **⌘ D** when hovering the mouse over a word.

**Open "Document name"** When right-clicking on selected text that matches in full or in part one or more binder item titles, a special "Open" command (or submenu, if multiple titles match) will appear at the top of the menu. Select one of these entries to navigate directly to the binder item in the same editor. Read more about the potential uses for this capability in Linking Without Linking ([section 10.1.1](#)).



**Style** Offers the same list of paragraph and character styles available from the Format Bar, or main **Format ▸ Style ▸** submenu (excluding the management functions found there). You can also pull up a special single-purpose menu showing style selections alone, with the **⇧⌘ Y** shortcut.

**Select Annotation/Footnote** When right-clicking within an inline annotation or footnote, this option will appear, making it easy to select the entire contiguous range of text that has been marked as notation. When two inline annotations of different colour fields are located adjacent to one another, this command will only select up to the edge of the current colour right-clicked upon.

**Split at Selection** Splits the current document into two documents at the selection point (the current blinking cursor point, or the initiating edge of the selection, which will be on the left by default, or on the right when using right-to-left languages). Also available as   K.

**Split with Selection as Title** Splits the current document into two documents using the selected text as the title for the newly created document. The selection will remain after splitting, making it easy to remove the redundant title text if necessary, or style it like a header. For more details on splitting documents, read Splitting and Merging Documents ([section 15.4](#)). Also available as   K.

**Append Selection to Document** Provides a menu of all documents in the binder. Selecting a document from this menu will cause the selected text in the editor to be appended to the document selected from the menu. Read Gathering Material ([chapter 9](#)) for more tips on moving text around and organising information in the Binder.

**Set Selected Text as Title** Sets the title of the current document to the text selected in the editor. Also available as   T.

**Add Selection to Auto-Complete List** Adds the selected text to the project's auto-complete list, which can be maintained in the **Project ▶ Project Settings...** Auto-Complete List tab ([section C.6](#)).

**Text Color** Provides the text colour menu, from which you can select from the built-in colours, or those custom colours you have saved into your colour palette. Read more about this and the highlight feature in Text Colour and Highlights ([section 18.5](#)).

**Highlight Color** Provides the text highlight menu, allowing you to select a highlight colour for the selected text, or to clear it.

**Spelling and Grammar** Quick access to spell check tools.

**Font** Provides basic character attributes, such as bold and italic, as well as access to the main font chooser.

**Speech** Quick access to the **Edit ▶ Speech ▶** submenu functions.

**Writing Tools** This submenu contains links to a few handy web searches and the system dictionary and thesaurus application. The current word, or selected text, will be sent to the search engine or reference site of your choice.

It also contains statistics entries at the bottom of the submenu, displaying the word and character count when an active text selection exists in the editor. If the footer bar is hidden, or you have statistics removed from it, this is an alternative way of getting this information.

## Hyperlink Selections

When the selection is entirely or partially within a hyperlink (not an internal document link), then additional link management options will be provided for at the top of the contextual menu:

**Open Link** The same action as left-clicking on the link with the mouse. This method is here primarily for accessibility purposes.

**Copy Link** Copies the underlying URL of the link, as in many web browsers, so that it can be pasted bare or used in other contexts such as the creation of new hyperlinks, or to import the web page into Scrivener using **File ▶ Import ▶ Web Page...**

**Edit Link...** With the cursor placed within a hyperlink, use this command to bring up the URL edit panel, or if the link is an internal document link, a browser so you can select a new target for the link. Be aware that if you select only part of a hyperlink before using this command, only the selected part will change, in effect creating two adjacent hyperlinks.

**Remove Link** This command will appear when one or more hyperlinks are found within the selection. Using it will strip the links, leaving only the visible text behind. The command is also found in the **Edit** menu.

## Document Link Selections

When right-clicking on document links (links pointing to another binder item within the same project), a few additional commands will be added to the menu.

**Open Document Link In ▶** Offers up to four choices for opening the link: “Current Editor” replacing the currently viewed item with the linked resource, “Other Editor” and “Copyholder” which opens a split/copyholder view as necessary and loads the target there, and finally “Quick Reference panel”, as a new window. Some options may be unavailable if they are contextually inappropriate (such as opening in another split from Composition Mode).

If you find yourself consistently using this menu to bypass the default behaviour of loading links in the other editor, consider changing the default behaviour for clicked links in the Behaviors: Document Links settings pane ([subsection B.4.2](#)), with the **Open clicked document links in...** setting.

**Edit Link...** With the cursor placed within a hyperlink, use this command to bring up the URL edit panel, or if the link is an internal document link, a browser so you can select a new target for the link. Be aware that if you select only part of a hyperlink before using this command, only the selected part will change, in effect creating two adjacent hyperlinks.

**Remove Link** This command will appear when one or more hyperlinks are found within the selection. Using it will strip the links, leaving only the visible text behind. The command is also found in the **Edit** menu.

**Link to Document** Creates a hyperlink to another document in the project. Read more about linking items together in Linking Documents Together ([section 10.1](#)). When right-clicking on an existing document link, the action will be to reassign the link to the selected target.

**Update Links to Use Target Titles** Only appears when one or more document links are contained anywhere within the current selection. This command updates the link text to match the binder titles of the items they respectively link to. Read more about the feature here ([section 10.1.2](#)).

## Images Contextual Menu

These options appear when right-clicking on an image that has been placed inline in the text editor ([section 15.6](#)):

**Reveal in...** Depending on whether the image is linked to a file on the disk or an item in the binder, this command will refer to “Reveal in Finder” or “Reveal in Binder”.

**Open in External Editor** Available when the image is linked to either the binder or the disk, the original image file will be opened using the system’s default image editor.

After editing an image, the changes will not immediately appear in the editor (it refreshes cached thumbnail per session). If the size of the image has changed you should use the “Reload from Original Image” command, to reset the editor’s sizing information from the image.

**Convert to Embedded Image** Imports the graphic from either the binder or the disk and fully embeds the graphic into the editor. You will no longer be able to access it from these external resources, or load it directly into an editor after doing so.

**Reload from Original Image** Reloads a linked image ([subsection 15.6.4](#)) from the original on the disk, or in the binder. This will update the cached thumbnail being used to present the image in the editor, but more importantly it will also refresh Scrivener's record of the image's dimensions and resolution.

**Save As Picture...** This command is available if you have right-clicked on an embedded image. You will be provided with a file chooser to specify the location and name of the graphic to save to the disk. You can also drag images into the binder to create them as files in your project.

**Scale Image...** Available to all types of images. This brings up a tool for resizing inline images and naming them ([subsection 15.6.1](#)), as well as locating their position in the binder or on the disk, if applicable.

## Tables Contextual Menu

When right-clicking within a table in the editor, additional options will be provided in a "Table" submenu:

**Table...** Accesses the table palette, which provides formatting, cell dimension, and nesting, and cell split and merge features.

**Add Row Above|Below** Will insert a new table row of empty cells above or below the row in which you right-clicked.

**Add Column Before|After** Inserts a new table column of empty cells to the left or right of the column in which you right-clicked.

**Move Row|Column...** Moves the current row or column in the describe direction. The precise direction available will alter depending upon the position of the row or column. For example if it is at the top of the table, you will only be able to move a row down.

**Delete Row|Column** Will delete the entire row or column in which the cell you right-clicked upon is located.

**Borders** This submenu provides some tools for removing specific cell borders.

**Distribute Rows|Columns Evenly** Adjusts the height or width of all rows or columns so that every cell has the same dimensions.

**Remove Table** Strips the table code out from the currently active table, leaving all text behind as linearised.

### Lists Contextual Menu

Only one extra option over the base text system has been added for list management:

**Re-number List** In rare cases, especially when pasting lists from other word processors like Word, list numbering will sometimes not register properly. Use this command to attempt to repair these lists.

### 15.3.3 Moving and Copying Text Around

The simplest answer for copying or moving text between sections of your binder will often be the venerable Cut, Copy and Paste commands. However you may find a few of Scrivener's additional techniques and optional behaviours to be easier to use in some contexts:

- Text can be appended to other documents, as discussed in Text Appending Tools ([section 9.5](#)).
- Within an editor context (including across section boundaries in a Scrivener's session) you can drag a selection of text to another location to move it.
- Hold down the **Option** key when doing so to copy the text to the dropped location instead.
- Dragging text selections into *other* contexts that accept dropped text will also result in moving the text to the dropped location. This includes dropping text into the binder sidebar, corkboard or outliner to create a new item with that text.
- You can adjust Scrivener to copy text when dragged in this fashion, by disabling the **Delete text dragged to other areas** setting in the Behaviors: Dragging & Dropping settings pane ([subsection B.4.4](#)).

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## 15.4 Splitting and Merging Documents

For some authors, the ability to expand and contract the detailing of your master outline is important part of using one. To that end there two tools that make it easy to fashion your outline into as broad or detailed a map as you require, by systematically breaking down longer chunks of text into a more detailed outline, or merging them back together in a less detailed outline chunk, as a seamless block of words.

Before discussing how to split and merge it would be useful to also look at when *not to*. Scrivener has two ways of effectively merging text without physically doing so:

1. First, for temporarily visualising many smaller pieces of text as though it were one long single document: select any container in the binder, a selection of items using **⌘Click**, or a group of items that is a product of a search result or curated collection list and choose to view and use the **View ▶ Scrivenings** menu command. You can read more about this capability in Editing Multiple Documents with Scrivenings ([section 15.5](#)).
2. Second, the compilation ([chapter 23](#)) system enables you to publish your final work as a single document, no matter how many individual pieces it may be divided into within the Draft folder. Furthermore, the system of designating chunks in your outline as having a “type” means you can outline organically rather than structurally. A scene could be broken down into a dozen small pieces in the outline, without there being any artefacts of that granularity in what your readers will eventually see on the printed page (or pixels, as the case may be!).

As a consequence, we more often speak of *splitting* long documents into shorter ones, in Scrivener. Splitting almost never comes with drawbacks, and the benefits of having an articulate and well defined outline are countless. Many of Scrivener’s tools, such as metadata, links, bookmarks and even project search and collections will become more powerful the more *atomic* a chunk of text is. E.g. if you search for a topical keyword and the result is a 5,500 word essay that goes over several topics, you’ll have to hunt and poke through the file to find what you were really looking for. But if that essay is cut into a dozen smaller chunks of text, each pertaining specifically to one or two topics, then your project search efficiency goes through the roof.

### 15.4.1 Splitting the Document

The **File ▶ Import ▶ Import and Split...** command can split incoming documents by a variety of criteria worth investigating ([subsection 9.1.6](#)). For cases where an automated split is not desired, this section describes a couple of tools that can be used to quickly split a longer binder item into smaller chunks of text.

#### Splitting Manually

To split a chunk of text in Scrivener into two pieces you will first need to place the caret at the precise point in the document where you wish the split to occur. If you select a range of text, the *start* of the selection will be considered the caret point, for purposes of splitting. Once the selected location has been chosen you can use one of two methods to split the document:

- **Documents ▶ Split ▶ at Selection (⌘K)**: Split the new document off from the current one, using all text after the current caret position (this can even split a paragraph in two). In cases where text has been selected, the caret position will be considered as the start of the selection range. It can be



useful to think of splitting in terms of “above” and “below” the selection. Everything above the caret (and also to the left if in the middle of a line) will remain in the original document, while everything to the right and below of the caret will be moved to the new document.

- **Documents/Split/with Selection as Title** (⇧⌘K): In all details this command works identically as the above, but in this case the currently selected text will be used to title the new document that is created, rather than leaving the title empty. This alternative method is only available when a range of text has been selected in the active editor.

This text will remain selected after you split, making it easy to remove it, or style it as a header.

You might also find the ability to search by formatting ([section 11.6](#)) to be of use as well, as often the places you will want to split the document by will coincide with headers. While the formatting search tool is open, you can use the “Split with Selection as Title” function without closing it, and then quickly go to the next search result within the portion that has been split off. Or, if you wish to use keyboard shortcuts: alternate between using ⇧⌘K to split the found text, and ⇧⌘G to skip to the next search result (the search tool can be closed).

#### **I did not mean to do that!**

It is not possible to undo a split action, but you can use the **Documents ▶ Merge** command (discussed next) to effectively undo any unwanted splits. Snapshots taken of the whole text will remain associated with the first document split *from*, and so rolling back to a point before the split will effectively undo it ([subsection 13.6.3](#)), though it will leave the second split document in the binder.

### **What Splits Off**

Splitting a document is considered to be a text-based operation. The text itself will be split at the cursor or selection, and the Synopsis and Notes content will remain in what becomes the first half. Snapshots, also being a component of the document’s text, will remain.

As for the rest, you can think of splitting as being very similar to duplication. Document attributes and metadata will all be copied into the second half. This includes label colour, keywords, custom metadata, compile settings, its bookmarks and even attributes like the icon and writing goals.

## **15.4.2 Merging Documents Together**

In opposition to splitting, the ability to select two or more documents and merge them together into a single document is done with the **Documents ▶ Merge** command (⇧⌘M).

- Merging requires a selection of two or more documents (this can be done in the corkboard, outliner or binder sidebar).
- Documents do not have to be in consecutive order, they can be picked from throughout the project. When selecting non-linear items, here are some tips to determine ordering:
  - If the view you are picking documents from is based on the binder order, then the merged document will retain that order.<sup>2</sup>
  - If using an outliner sorted by a column then the merge order will conform to the sort order.
  - When using a collection to select items, the collection order will be used to establish the structure of the merged document.

When it comes to metadata, merging will attempt to retain as much individual item data as is possible. The synopses, notes, keywords, bookmarks and the list of snapshots will be combined into one list.<sup>3</sup> Metadata which cannot be combined (such as titles, section type, labels, any custom metadata, compile option flags, and so forth) will use the top-most item in the selection for these values.

Title and Synopsis	Status	Keywords
<div>Document A</div> <div>This is the first document</div>	First Draft	Apples
<div>Document B</div> <div>This is the second document</div>	To Do	Carrots

Title and Synopsis	Status	Keywords
<div>Document A</div> <div>This is the first document</div> <div>This is the second document</div>	First Draft	Apples, Carrots

**Figure 15.3** Merging two documents: before (top) and after (bottom).

In [Figure 15.3](#) we have two documents in the top half of the figure, “Document A” and “Document B”, each with their own synopsis, status and keywording. The

<sup>2</sup> For this purpose, a selection from a freeform corkboard is still considered to use the binder order, even though the cards can be scattered all over.

<sup>3</sup> Any bookmarks pointing to documents within the group being merged will be destroyed as they will of course no longer have any meaning.

bottom half of the example shows the resulting singular document created by combining these two with the **Documents ▸ Merge** command. The synopses have been merged, as well as the keywords, but the status and title are taken from the first document in the list.

Main text content will be combined according to the settings in the General: Separators Settings tab, under “Merged documents” ([subsection B.2.9](#))—an empty line by default.

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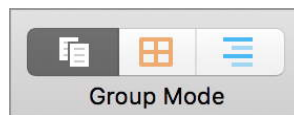
## 15.5 Editing Multiple Documents with Scrivenings

The “Scrivenings” view mode allows you to edit multiple text documents as though they were one long document. In this way, you can write in small chunks and then combine them in any way you like to see how they work together. A common usage is to write lots of small subsections within a folder, collectively representing a chapter; by clicking on the folder they can then be edited all together in a Scrivenings session to see how the chapter fits together as a whole.

You can also form scrivenings sessions by selecting multiple items from the binder sidebar.<sup>4</sup> This can be a handy way to read segments of text that would not otherwise appear together, like viewing various scenes from a plot thread that stretches throughout the novel.

### 15.5.1 Viewing Multiple Texts as One Document

Scrivenings mode is, like its siblings the corkboard and outliner view modes, a way of working with broader areas of the binder than just one item at a time. Editing in this fashion can be as simple as clicking on a folder and using one of the following methods to switch to Scrivenings view:

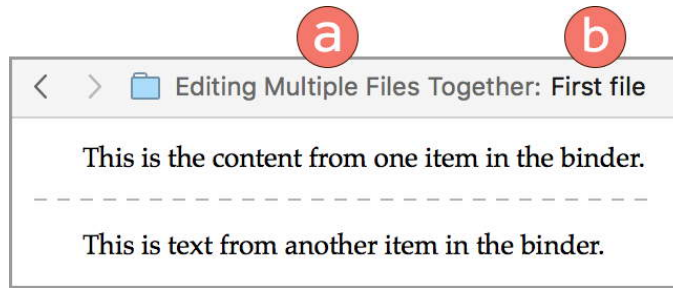


**Figure 15.4** The Scrivenings group view mode button in the toolbar.

- Click the left-most icon in the Group View toolbar button set ([Figure 15.4](#)).
- Use the **View ▸ Scrivenings** menu command or **⌘ 1** shortcut.

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<sup>4</sup> Unlike corkboard and outliner, scrivenings can be taken into Composition mode ([section 16.1](#)). Press the Compose button in the toolbar after setting up the session in the editor.



**Figure 15.5** Scrivenings mode makes it possible to edit many files together at once.

Depicted here is a basic Scrivenings session, using descriptive file names in the header bar:

- a) The grey text lets you know what group of things you are editing. In this case it is a folder of documents named “Editing Multiple Files Together”. The icon to the left is associated with the group, and as well right-clicking in the header bar will work upon the group as a whole.
- b) The text in black indicates which chunk of text *within* the session is being edited; in this case the first document is rather unimaginatively titled, “First file”; this title can be edited normally ([section 8.1.1](#)).

The main editor itself will be divided by dashed lines, indicating where one chunk of text stops and another begins. The divider itself cannot be moved or edited directly, though you can cut and paste to move text across them.

Scrivenings sessions are one of the few areas in Scrivener works with a flattened depiction of the outline hierarchy. A prologue at the very top will be printed right along with items which are buried in subfolders. This is intentional, so you can concentrate solely on the same flow of text that your readers will be experiencing.

## 15.5.2 Editing with Scrivenings

Since Scrivenings is a regular group view mode, it fits in seamlessly with the views more oriented toward organisation and overview. Here are a few examples:

- While editing, new documents can be created using any method you prefer. New items will be placed using the same rules as if the initial document were selected in the binder ([section 6.3.1](#)).
- Likewise you can split a document and see the new divider pop up immediately.
- Moving documents around in the binder or another group view will automatically update the order in which they appear in the session. Opening

two splits so you can drag cards in one view and read the results in real-time in the other split is a great way to play with the narrative order of your text.

- Trashed documents will be removed from the session.

#### **Can't edit some selected text?**

Some editing commands are prohibited if your selection falls across file boundaries. For example, you cannot overtype or delete such a selection, or perform search and replace operations that would fall across them.

### 15.5.3 Quick Navigation Through Scrivenings

Scrivenings view affords you with some unique tools for jumping around within large texts. Here are a few ideas for how its many tools can be combined to boost your efficiency while writing in this view:

**The outline navigation buttons** If you click one of the outline navigation buttons ([section 8.1.1](#)) in the editor header bar (marked (d) in [Figure 8.1](#)), and that action will result in movement within the boundaries of the active session, you will be navigated from section to section without disturbing the session.

If you leave the boundaries of the session, or if the binder sidebar is not related to the text you are viewing, then you will leave the session.

**Jump to Scrivening button** You can access a miniature “table of contents” for the current session with this handy button ([section 8.1.1](#)).

**Using other group views seamlessly** When the above “table of contents” isn’t enough, don’t forget that the three group view modes are designed to seamlessly display the same content between each other. If you are editing a long sequence of text and press the ⌘2 shortcut to switch to Corkboard view, you’ll find the card representing the section you were editing selected. If you select another card and jump back into Scrivenings (⌘1), your session will have jumped to the card you selected.

Combine *that* concept with filter outliner & corkboard views ([section 11.4](#)) and you can quickly leap through large chunks of text, by a variety of criteria you can define.

**Lock in Place navigation** With the editor locked (**Navigate ▶ Editor ▶ Lock in Place**, or ⌘L) clicking on documents that would ordinarily be ignored by the lock will instead navigate the session to the selected document, if that document is found within it.

### 15.5.4 Useful Tips

**Statistics count the whole session** The footer bar will display statistics for the entire session, rather than individual sections you are working within. If you want to get a quick word/character count for the individual section you are writing in, use the next tip.

**Selecting only the section you are editing** Use the **Edit ▶ Select ▶ Select Current Text** ( $\text{⌘}A$ ) command to select the text area for *only* the binder item you are actively editing within the larger session.

**Jumping to the end or beginning of a section** In conjunction with the above tip, a neat trick for jumping to the very beginning or end of the current chunk of text is to select the section and then use the  $\leftarrow$  to jump to the beginning, or the  $\rightarrow$  to jump to the end.

**Isolating the current document in the editor** Use the **Navigate ▶ Go To ▶ Selection** menu command ( $\text{⌘}4$ ). Alternatively, use **Navigate ▶ Open ▶ as Quick Reference**, to view the current section in its own window.

**Focusing on a smaller section** At times you might find yourself wanting to narrow down the amount of text you're working with. Say you've got an entire Part loaded, with 15 chapters, and want to focus solely on chapter 12. Use the content navigation button ([section 8.1.1](#)) to jump to the chapter 12 container, then use the above tip to "isolate" it. If this loads one single empty folder's text into your editor then press  $\text{⌘}1$  to switch to Scrivenings view for that container.

**Broadening the scope of your session** In inverse to the above trick, to expand your session to show the context of text around it, use **Navigate ▶ Go To ▶ Enclosing Group** ( $\text{⌘}R$ ) to in select the *parent* of the current session, while keeping the current chunk of text in view.

**Comments and footnotes as bookmarks** Linked Notation ([section 18.3](#)) will be displayed together in the inspector in a single large stack, making it easy to see all notes from constituent text throughout the entire session. Selecting notes in the inspector scrolls your view to that point, making this great for bookmarking places.

E.g. if you want to mark your place so you can go investigate other areas of the text for a bit, put down a linked comment with **Insert ▶ Comment** ( $\text{⌘}⌘*$ ) and click on it later to jump right back to where you were.

**Vertically accurate scrivenings dividers** If for reasons of taste, or formatting necessity, you require a zero-height scrivenings divider, you can make use of the "Corners" separator in the Formatting Setting tab ([subsection B.5.13](#)). This setting will have separation drawn as "crop marks" in the margins instead of using a divider across the middle.

### 15.5.5 Scrivenings Settings

As a mode intended to augment creative writing, there are many settings and adjustments that can be made to this view mode:

- Add the binder names of items as titles to the text, with the **View ▶ Text Editing ▶ Show Titles in Scrivenings** menu toggle.<sup>5</sup>
- The Appearance: Scrivenings settings pane ([subsection B.5.13](#)) has settings for adjusting the font, size, alignment and whether titles have a shaded highlight.
- By default, titles will decrease their font size depending upon how nested the item is in the binder.
- By default the text content of the group itself will occupy the first chunk at the top of the session. If you tend not to write into folders themselves, you can switch this behaviour off.
- You can also change the style of divider used between sections, and whether they will be used in addition to titles.

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## 15.6 Working with Images

While images themselves cannot be placed into the Draft folder as binder items, there are several methods for placing them into your text, all involving inserting the image into the text editor itself, like you would in a word processor:

- Dragging an image file in from the Finder.
- Dragging an image document in from the binder, outliner or corkboard.
- By using the **Insert ▶ Image From File...** menu command (or one of its sibling commands, discussed in the following pages).

In all cases:

- Images will be placed at the current cursor position or drop location.
- Images placed into documents in this fashion will create a *new copy* of that image, even if it was dragged in from the binder.

This becomes important when working with placeholder images. If you intend to later edit your images or replace them with updated copies from

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<sup>5</sup> If you have a strong preference as to how future projects should have this aspect set up, consider saving your settings into a project template ([subsection 5.4.3](#)).



a graphic designer, you may wish to instead use Linked Images ([subsection 15.6.4](#)).

### Viewing inline images full-size

To view an image in the editor on its own, you can drag the image from the text into the header view of one of the editors. You can then double-click on the image and zoom in or out on the image. Note that any changes made here will not impact the original image in the text.

## 15.6.1 Resizing Inline Images and Naming Them

To resize the inline image, double-click on it. Use the controls to shrink the image or increase its size, and then click on **OK**. Unchecking “Lock aspect ratio” allows you to adjust the width and height independently and therefore distort the image. Clicking **Cancel** restores the image to its former size and returns you to the editor. Note that some images types (notably, vector PDF) cannot be resized.

It is important to note that for images that will be compiled, resizing images in the editor is an output, rather than an aesthetic, decision. When an image is resized in the editor it will be directed to use that size in the final output as well. If you find the graphics you are using are too large, and are getting in the way of writing, you may consider using placeholder thumbnails instead. Using linked images is ideal for working this way, as you can swap out the full-size images on the disk prior to compiling.

For embedded graphics you will also note a **Name** field in the image editing panel. For most ways of working this name will do very little, but if you use a markup format like ePub, HTML or Markdown then the name of the image can be important if you intend to work with the compiled output using other programs—particularly if you’ve pasted most of your graphics in and do not wish to have to contend with hundreds of generically named files.

### Embedded Images and Scrivener for iOS

If you intend to use the iOS version of Scrivener to edit your project, then it will be best practice to make use of one of the image linking techniques described in the following sections. The text editing engine provided by iOS is incapable of working with high-res graphics (greater than 72 DPI), and will drop the resolution of them when editing text that contains such images. Be aware that “resizing” images in Scrivener by definition changes its DPI, and thus can result in the image size being reset back to 72 DPI when syncing back to your computer.

## 15.6.2 Saving an Image Out of the Editor

To save the image to the disk, right-click on the image and select “Save as Picture...” from the contextual menu. This option will not be available with a linked image, which naturally is already on the disk—instead a command to “Reveal in Finder” will be provided.

You can also simply drag and drop an image from the editor into the binder to create a copy of it in your project.

## 15.6.3 Embedding Inline PDFs

It is possible to drag PDF files into your editor to embed them. This feature is meant to allow the usage of graphics saved in the PDF format. It will not allow multi-page documents to be inserted into the final manuscript, and if the original PDF is pre-formatted for print, you will very likely need to crop the result down significantly so that it can fit within the page margins, using a PDF editor such as Preview, or Acrobat Pro.

When compiling or exporting to formats that do not support embedded PDFs (only a few of the text-based technical markup formats support native PDF), a raster graphic will be automatically generated for you and embedded as a PNG file, if the compile format allows embedded graphics. This will cause a loss of vector data, and so the conversion uses a large PNG that is then shrunk down to scale for high quality. You can adjust the DPI used for this in the Sharing: Export settings pane ([subsection B.8.2](#)).

## 15.6.4 Linked Images

If you are familiar with desktop publishing tools like Adobe InDesign, then the manner in which linked images work will be familiar to you. For those not aware, linked images are the placement of graphics in your text in such a way that the thumbnail in your editor is being generated by files *outside of the document*, as opposed to being saved into the text of the file itself. This tactic keeps the storage expensive image files outside of the text itself, keeping your project text lightweight.

To create a linked image, use the **Insert ▶ Image Linked to File...** menu command. Linked images will look and act like embedded images in every way. You can by and large ignore the difference between them while working.

When compiling with linked images, the *current* version of those images on disk will be used to create the embedded copies used in the compiled version. Since nearly all of the compilation formats do not support active image linking, Scrivener must take the current version and embed it in the final copy. So if you are in a workflow that involves external help from designers, be sure to get your external images up to date before producing final compiled copies.

## Resizing Linked Images

Just as with embedded graphics, you can adjust the display size of the image ([subsection 15.6.1](#)). It is important to know that doing so will alter the original image's metadata on the disk. The image will not have its pixels touched, but its print size information will be altered. If it is important to you that Scrivener not adjust the original files then do not use the resize tool in the editor, or consider using image placeholder tags ([subsection 15.6.5](#)), where sizes can be specified as compile-time directives on the output images rather than the originals.

Linked images also have a few extra features in the image editing panel. The full path to the image on the disk will be printed for your reference. This text can be copied and pasted as needed. For a friendly way to get to the image, click the **Reveal in Finder** button. If you need to change the source file for whatever reason, use the **Change...** button to select a new graphic.

## Updating the Image from the Disk

Scrivener generates a thumbnail of your image when you first view it (or initially link to it) in the editor, but for performance reasons it will not update it during the session. Whenever you re-open the project, this thumbnail will be updated from the disk.

To have an individual thumbnail updated immediately, right-click on the image and select the “Reload from Original Image” menu command.

This will also reset Scrivener's record of how large the image is and its pixel resolution. So while reloading the image might be an aesthetic option if only the pixels of it have changed on the disk, if the *size* has changed on the disk, it can be important to reload it using this command, as Scrivener may otherwise squash or display the image incorrectly when compiling.

## Renaming an image on the disk

You can of course freely rename images whenever and however you like, but you will find that upon reloading the project at a future point, the links will have broken. A technique for safely renaming an image name while preserving the link is to do so from within Scrivener:

1. Double-click the linked image to edit it.
2. Click the **Change...** button to bring up the file dialogue.
3. Right-click on the name of the image in the file browser and select the “Rename” option.
4. Once you've renamed the file on the disk, click the **Open** button to confirm reassigning the link to the same file by its new name.

## Links on Multiple Devices

If you intend to use multiple devices, it is not uncommon for links to be temporarily broken while away from your main computer. It is safe to work around broken links; once you return to the machine that has those images in the described locations, they will link back up.

You can also choose to store your images in a subfolder located by the project itself. For example if you have a project on your Desktop, you could create a folder called “Blog Images” and store your linked images in there. If Scrivener cannot locate linked images upon loading the project, it will cast about looking for them in the current location. In a way, they will work like relative links do.

## Fixing Broken Links

Dynamically finding lost images is a process that must be very strict, so as to not accidentally link to the wrong images, it will only work in straightforward cases. Fortunately image links can be easily repaired by hand. A broken image will fall-back to a warning message with a special token identifying it as an image link and the expected path to the image:

```
MISSING_IMAGE:/path/to/image.png
```

The simplicity of this system means that if you fix the path to the image right in the text editor and then reload the project it will link back up. This also means that large-scale changes to paths can be made using the **Edit ▶ Find ▶ Project Replace...** tool.<sup>6</sup>

## Images Linked to Binder Items

You may at times wish to use linked images to keep your text files trim rather than bloated with large files—but at the same time not have any need for the advantages using the file system gives you, and would prefer not to have to deal with the disadvantages, such as fixing broken links or having to contend with issues between synced systems across multiple platforms.

Linking to images in your binder is the solution to this problem. The graphic is not placed into your text directly, just as with a file link, while the graphic image itself will be managed by the project for you, available on every platform you take the project to.

To link to a graphic in the binder:

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<sup>6</sup> When using Project Replace to fix many broken links at once, you should rebuild your project's search index, by holding down the **Option** key on the File menu and selecting the **File ▶ Save and Rebuild Search Indexes** menu command. This will remove any lingering missing image placeholder references from the search index.

1. Import the graphic into the binder if necessary. The name you give the file in the binder will be used when compiling it, for those formats where it matters.
2. From the text editor, use the **Insert ▶ Image Linked to Document ▶** submenu to select the graphic. Only graphics and PDFs will be listed in this menu.
3. Alternatively, if you intend to predominately link to images in the binder, it will be far easier to visit the Behaviors: Dragging & Dropping settings pane (subsection B.4.4) and setting the **Link to images dragged from binder into editor** option. You may also want to visit the Behaviors: Document Links pane and enable the **Image links create back-link bookmarks** option. With that enabled, you can click on the image in the binder and view its bookmark list to see precisely where it is used within your draft folder.

When images have been edited out of the binder, you can have Scrivener reload the changes by right-clicking on the image and selecting the “Reload from Original Image” contextual menu command.

### 15.6.5 Image Placeholder Tags

Images can be referred to using plain-text placeholders (in a similar vein to how HTML or Markdown would refer to an image), to address various cases where this approach would be beneficial:

- Allows you to use graphics in the compile settings, in areas that otherwise wouldn’t support them—on account of their being defined by plain-text fields—such as custom separators, title prefix and suffix fields.
- Textual links to images afford you additional powers over typical images displayed in the editor. Since they are text based, they can be easily modified by compile-time Replacements. A few examples:
  - Different file types, such as ePub and RTF, could have the path to the image altered, pulling high-resolution graphics for one format and lower resolution, highly compressed images for the ebook.
  - Image placeholders might be entirely removed, or removed based on some criteria.
  - As image placeholders can set the resolution of the image, this can also be modified by replacements if different compile targets have different paper sizes.

The basic syntax for the image tag is:

```
<$img:IMAGE_NAME;w=WIDTH;h=HEIGHT;ebook=WIDTH>
```

Everything after the image name is optional.

## Image Identification

The image must be specified either by its imported name, as displayed in the binder, or by a valid system path to the image's location on your computer. Path names can be relative to the location of the Scrivener project, so if the graphics and the project are stored in the same folder, you would only need to declare the path as 'image\_name.png' for it to work. You can also use the UNIX shortcut for your home folder, the tilde. Full absolute paths are acceptable as well.

```
<$img:~/Dropbox/MyBookFolder/scene_break.png>
```

This also demonstrates a safe way to link to an image that will work from multiple computers all using this Dropbox account, since the details of the user folder name are represented by the tilde.

The following example references a graphic that has been stored in a subfolder called Resources, which is a folder alongside the Scrivener project:

```
<$img:Resources/python_chart.jpg>
```

Here is an absolute link to an external hard drive called "Research", where an image in the subfolder "MyThesis" is referenced. As with all embedded PDFs, you should ensure it is only one page in length and smaller than the text print block (sans margins):

```
<$img:/Volumes/Research/MyThesis/some_data.pdf>
```

When using graphics that you have imported into the project binder, you can refer to them by their binder title (you needn't know the extension or type of graphic it is). This will be used in precedence over any path names, and the first matching title name (counting from the top of the binder) will be preferred over any other images likewise named in the project. A simple example, specifying an image that is called "Python Growth Rates in Everglades":

```
<$img:Python Growth Rates in Everglades>
```

## Specifying Image Width and Height

The width and height of the image are optional values, declared in points. If you have already sized the graphics correctly in accordance with your printer's specifications and output quality, then you will not need (or indeed want) to change the image size using Scrivener. However if you are not concerned with pre-sizing the images and just want to let Scrivener handle them for you, you can specify the width and height of the image in the placeholder tag, to instruct the compiler to resize it as necessary.

It is valid to give only the height or the width alone. The compiler will preserve the original aspect ratio of the image, adjusting the other measurement for you. If you declare both the width and height yourself, it is possible to squish or squash the image however you please.

```
<$img:Portrait of Dickens.jpg;w=468>
```

This will resize the portrait so that it is 468 points wide<sup>7</sup>, adjusting the height of the image so that it remains proportional with the original in terms of aspect ratio; no squished faces here!

For ebooks you can optionally declare an image to be set to a percentage of the screen's display, rather than a fixed size. This will be done by using a secondary setting, which will override the fixed width setting if also given. The following example will display the image at 468pts wide in most compile formats, but when compiling to ebooks, will instruct the image to be displayed at 50% of the reader's screen size (or the software's reader window, et cetera):

```
<$img:Portrait of Dickens.jpg;w=468;ebook=50%>
```

## Tips for Usage

Here are some ideas for how this feature can be used, as well as some handy tips for common uses.

- *Using Replacements to Change Images:* use of replacements in the compiler ([subsection 23.4.4](#)) will be evaluated prior to any images being included. That means you could use the feature to scan for the placeholder tag and remove it from the document, or perhaps change the path of the image to something else, which could be useful if you have two different groups of images, one optimised for black & white printing, and the other for an online full colour PDF or lower resolution ebook.
- *Searching for images:* since the image is defined as text, that means you can search for it by name, or even search for all “<\$img...” tags in the draft to get a list of documents with figures, which could be saved as a search collection ([subsection 10.2.4](#)).
- *Using images as a compile-time prefix or suffix:* when compiling, it is possible to use an image in the prefix or suffix areas of the section layout compile option pane ([section 24.2](#)) or in separators ([section 24.4](#)), to use graphics between scenes, or below chapter headings.
- *Specifying an image when two or more share the same name:* in cases where you have multiple images with the same name in the Binder, if you need to ensure that a certain one of these (rather than the first one in the list from top-down) is used, select the image placeholder and create a document link ([subsection 10.1.1](#)) from it pointing to the correct image.

---

<sup>7</sup> As the width of a point is 1/72 of an inch, that will be 6.5", or just wide enough to extend to the margins in a US Letter page with 1" margins all around.



## 15.6.6 Images for Output

### Handling Print-Ready Images

In the case of print-ready images the text editor will display a rough approximation of the image's final size, rather than its actual pixel size, when the DPI and physical measurements are set to an appropriate value for printing. For instance a 300 DPI image that is meant to be 2.5" wide on the printed page will appear approximately 2.5" wide on your monitor, and so it will not dominate the editor.

Scrivener uses the publishing standard of points as a unit of measurement, rather than pixels or other ruler-based measurements. Adjusting the scale of an image in the text editor does not impact its literal pixels, but rather the point value which will be used to determine how large it displays. Points are a fixed unit of measurement (there are 72 of them per inch). If you are using a typical US Letter with 1" margin document then the widest you would want an image to be is 468 points. For A4 with 25mm margins you wouldn't want an image wider than 453.6 points.

If you've been provided full size, print-ready graphics for publication, it is often best to not embed them directly into your text. Embedding images in the document is good for small placeholders, but since the images are saved into the RTF file itself, adding very large high resolution graphics to your files may slow down Scrivener's ability to load and save your file while you work on it, and may even cause instability when it comes time to combine everything together into one large document. Do also consider common professional production tactics of using linked images or placeholder tags instead of fully embedding large graphics into your source files.

### Reducing Quality for Proofing

If for some reason you cannot make use of the image linking capabilities to handle multiple sets of graphics, you will most likely find that high-resolution print-ready graphics make for a PDF file that is too large to comfortably send out to proofers. The compiler can be set to crudely compress and downsize graphics on the fly, leaving the originals unharmed, producing a smaller document. Refer to the special PDF print options, in the General Options compile overview tab ([section 23.4.3](#)).

### Images and Compiling to Markup

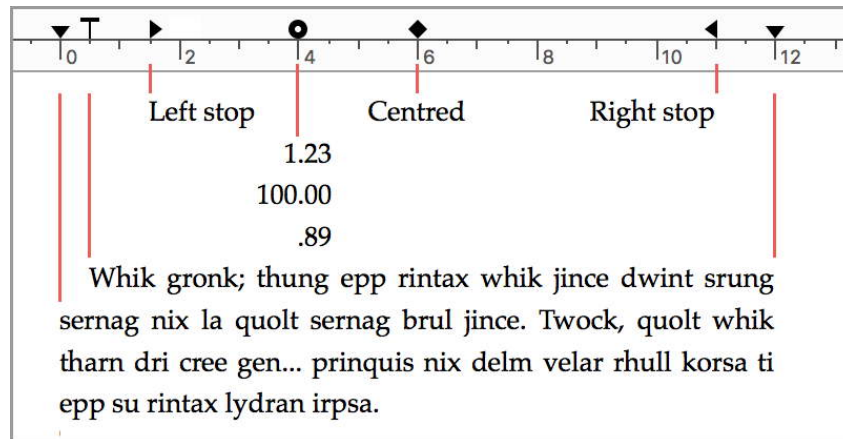
When using Web Page (HTML), or any of the MultiMarkdown and Pandoc compile formats, images will be converted into appropriate syntax in the text and exported into the compile folder along with the text file itself. For formats that end up combining the source files into a bundled format like WebArchive or DOCX (via Pandoc), these intermediate files will be handled in temporary folders and won't appear in your output folder.

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## 15.7 Formatting Tools

### 15.7.1 The Ruler

The text editor in Scrivener uses a traditional ruler, along the top of the text editor, for setting indents and tab stops. It can be shown or hidden via the **View ▶ Text Editing ▶ Show|Hide Ruler** command (**⌘R**). The ruler provides a simple indenting and tab stop interface ([Figure 15.6](#)).



**Figure 15.6** Example ruler and paragraph indent settings.

- If you would prefer more precision with these settings, use the **Format ▶ Paragraph ▶ Tabs and Indents...** menu command ([section 15.7.1](#)).
- Additionally there are menu commands for adjusting the various indent settings dynamically, which can be bound to keyboard shortcuts if you change them often. They are found in the **Format ▶ Paragraph ▶ Increase/Decrease Indents ▶** submenu.
- For those with a Touch Bar equipped Mac, you can also add most of these indent commands to your keyboard.
- Ruler settings are adjusted per-paragraph. To adjust the ruler settings for many paragraphs at once, you will need to select them prior to using the ruler.
- To apply ruler settings from one portion of text to another, it is possible to copy paragraph settings by using **Format ▶ Paragraph ▶ Copy Paragraph Attributes** and **Format ▶ Paragraph ▶ Paste Paragraph Attributes**.

### Tab Stops

Tabs allow you to enter tabular information into a single line, without using tables, and as well to format some kinds of information horizontally along the page. If you are looking for a way to indent your paragraphs, skip to the next section—one should never use tabs to indent paragraphs.

Left-aligned stops can be created by double-clicking anywhere in the ruler, and additional types can be accessed by right-clicking in the ruler and selecting one from the menu. Once placed, they can be moved via click-and-drag, and the numerical value of its position will be printed above the mouse pointer as you drag. Tab stops will be depicted by type using icons. The four tab types available are:

1. Left: This is the standard type. Text will be left-aligned, with the first character indented to the position of the tab stop.
2. Center: Text will be centre-aligned, using the position of the tab stop as an anchor point; this can be anywhere on the line and is thus distinguished from centre-alignment, which uses the width of the indented line to calculate the middle.
3. Right: Will right-align text with the right-indent set to the point of the tab stop.
4. Decimal: Most often used for aligning rows of numbers, so that the system decimal character is lined up vertically with integers before the decimal being right-aligned, and any fractional values left-aligned.

To remove a tab stop, simply click and drag it down or up out of the ruler until the icon disappears.

#### **Left indents are not tab stops**

Unlike some word processors, Scrivener will not treat the left block indent as an implicit tab stop, for the purposes of formatting the first line of text. You will need to set a manual tab stop that matches the indent, for the purposes of achieving designs that use a hanging indent combined with a block left description.

Using tab stops while writing is as simple as pressing the **Tab** key to advance to the next available stop. If there are no more tab stops available on that line, the system will wrap around to the next line at the first tab stop, but no newline will be added. To remove a tab from the line, simply delete it as you would any other character. Tabs can be viewed as symbols with the **View ▸ Text Editing ▸ Show Invisibles** menu command.

## **Indents**

There are three indenting controls, not to be confused with margin controls (which Scrivener's ruler does not address). Indenting is the action of offsetting text a defined distance from the margin. A left indent pushes the text boundary toward the right, away from the left margin. A right indent pushes the text boundary toward the left, away from the right margin.

In addition to the two primary indent markers is the first-line indent marker. This will *only* indent the first line of a paragraph. Using this control, it is possible to set the first line to indent by half an inch, while the rest of the paragraph is set to zero (or directly adjacent to the margin).

**Hanging Indents** These are produced using the same tools as ordinary first-line indents, only to produce a hanging indent, you will need to inverse which marker comes first. If the first-line indent marker is to the left of the left-indent marker, then the body of the paragraph will be pushing inward, while leaving the first line “hanging” over the blank space below it.

**Right Indents** These are rarely used, and they will often restrict flexibility down the road. Depending on your ultimate page size, it can be difficult to calculate where they should be set to. For instance, if you prefer to proof with a more generous page margin of 1.75” but need a 1” margin for submission, an appropriate distance of right-indentation away from the left margin would differ. However there are cases where it is necessary, of course, and in such cases you will need to restrict yourself to using a more limited set of paper and margin sizes.

Alternatively, if the width of the right indent is less important than there simply being one, compiled styles can be set to **Match right indent to left** in the compile Styles option pane ([subsection 24.5.3](#)), causing an equal amount of indent to be used on both sides, no matter how wide or narrow the text block itself.

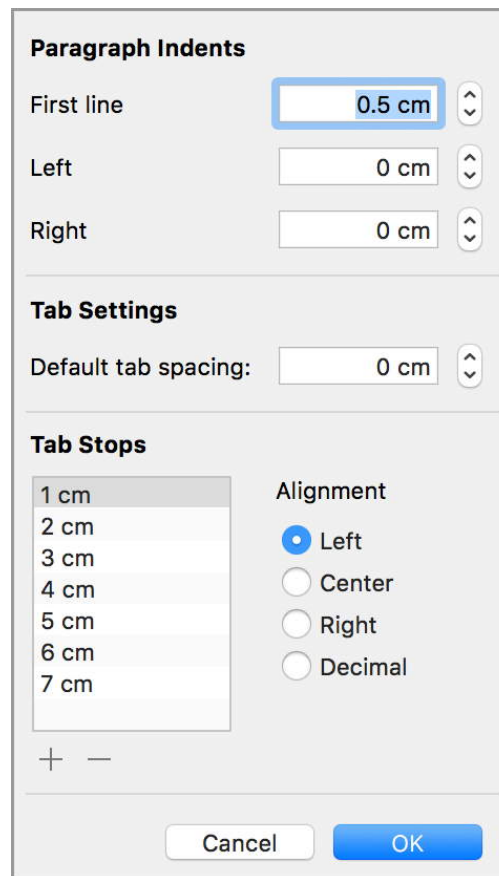
Sometimes, when importing material from word processors you may get text which is already indented artificially, causing the text to be narrower than it should be. You can either pull the right indent marker all the way to the right to disable it altogether, or use the **Documents ▶ Convert ▶ Text to Default Formatting** menu command to clean up large amounts of text at once.

### Ruler Conversions

When working with units in Scrivener, bear in mind that its ruler starts at margin zero instead of paper zero. Since Scrivener is, by and large, not “aware” of paper or margin settings in its editor, it considers “0” to be where the text starts. This is in contrast to many word processors, which start measuring at the paper’s left edge, and show the print margin as blank space in the display of the page, with the ruler starting somewhere along the lines of 25mm or 1”.

Consequently, to calculate a right indent, which is measured *from the left side* to useful values here, you will need to factor in the standard amount of print margin into the numbers you see on the ruler. For example, if you are using 1” margins and you need a right-indent that is 1” deeper still offset from the right margin, the right-indent should be set at 4.5” for US Letter, not the standard 5.5”.

### The Tabs and Indents Tool



**Figure 15.7** The “Tabs and Indents” tool allows for precision adjustments.

If you find working with the ruler tool difficult in terms of getting precise

placement, or are working with closely spaced markers and having troubles clicking on the right one, the **Format ▶ Paragraph ▶ Tabs and Indents...** utility provides a place where you can insert measurements directly and even create stock tab stops on an interval.

All measurements are made from the left edge of the ruler as shown in the editor. So if you call up this panel using Page View mode ([section 16.2](#)), the numbers may be different than called up in standard fixed-width or wrap to editor mode (the latter two do not add margins to the ruler).

**Paragraph indents** The first three settings adjust the amount of first-line indent, left block indent and right (or trailing) indent. Use a smaller value for “First line” than “Left” to achieve a hanging indent appearance.

**Default tab spacing** This setting makes it easy to insert tabs across a fixed measurement, without having to key them all in manually or having them clutter up the tab stop list or ruler, below. To reiterate, this will *not* insert markers that you can see, it will merely impact how far the cursor will jump when pressing **Tab** on a line, so long as there is no manually placed tab stop nearer to the cursor position than the next default tab stop.

Set this option to “0” to disable it and have tabs only placed with the manually created stops you define.

**Tab stops** This section lists all tab stops in the current paragraph by their measurement. Clicking on a stop in the list will display its **Alignment** setting to the right. Double-click to change where the stop should be placed along the ruler.

To create a new tab stop:

1. Click the **+** button below the list and type in the placement, as measured from the left edge of the ruler.
2. Select an alignment option from the radio controls on the right (“Left” is the default).

To delete selected tab stops, click the **–** button. Click the **OK** button to apply all ruler adjustments to the current paragraph (or selection).

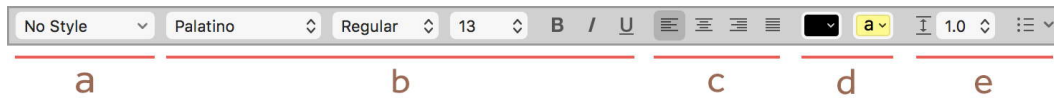
## 15.7.2 The Format Bar

The Format Bar provides quick access to common formatting features. Its visibility is toggled with **View ▶ Text Editing ▶ Show Format Bar** (⌘⌘R).<sup>8</sup>

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<sup>8</sup> If you are looking for tab and margin controls, the Ruler is available per text editor with **View ▶ Text Editing ▶ Show Ruler**.

Designed to collapse when the editor width is too narrow for the full bar, the first segments will become clickable icons that open up menus or palettes providing the same level of functionality (Figure 17.4).



**Figure 15.8** Format Bar: displayed in sections

The first section (Figure 15.8) of controls handle font face, size, and variant. All of these tools act immediately on the currently selected text. If no selection is given, then they will alter how you type from the current caret position onward.

- a) Styles: use this button to apply styles to selected text or the cursor. Also displays the current style in use. For more information, refer to Styles and Stylesheets (chapter 17).
- b) The next set of buttons are for working with fonts manually, selecting the font family, variant and size, in that order. Lastly are convenience buttons for selecting bold, italic variants, and underscoring text. All of these functions are also available from the Font Panel (subsection 15.7.4).
- c) Paragraph alignment can be set here. Choose from left, centre, right and justified.
- d) The text and highlight colours are selected from these two buttons, respectively. They have two different modes of operation. Click with the left mouse button to apply the active colour (as shown) to the text. Use right-click to select a different colour, or to choose the “remove colour” swatch (shown as a white box with a red slash through it). Refer to Text Colour and Highlights (section 18.5) for more information.
- e) The final section sets paragraph & line spacing, and lists. The spacing dropdown provides some quick presets for line height multiples, but for more complex settings, as well as paragraph spacing (above or below), select the “Other...” item at the bottom of this menu. Likewise lists can be customised by selecting “Other...” from its respective menu.

### 15.7.3 Hyperlinks

Scrivener has broad support for creating hyperlinks in the text, either to other areas within the project itself, or between projects (section 10.1), and of course as external links to other software, files and websites. This section will concern itself with the latter form of linking.

If you paste a URL into the text editor, in most cases the editor will recognise it as a URL and automatically create a clickable link for you. If you would prefer full



control over when links are created, disable this behaviour with the **Automatically detect web addresses** setting in the Corrections settings pane ([section B.6](#)).<sup>9</sup>

## Adding Links Manually

You can attach a link to any form of visible text or image in any area of Scrivener that takes rich text formatting:

1. Select the text you wish to link from, in the editor, or place the cursor where you would like the visible URL to be inserted.
2. Use the **Edit ▶ Add Link...** menu command (**⌘K**).
3. Select the type of link to create (if you have the full URL ready to paste, use the **No Prefix** option).
4. Type or paste the URL into the text field and click **OK**.

If a valid URL is found on the clipboard, it will be automatically pasted into the field for you, and if relevant, the prefix setting will be selected.

## Editing Links

To edit an existing link, including those detected automatically by the software:

1. Place the cursor anywhere within the range of a link, or select it completely.<sup>10</sup>
2. Use the **Edit ▶ Edit Link...** menu command (**⌘K**), or right-click and select the command from the contextual menu.
3. Modify the link settings and click **OK**.

## Removing Links

To get rid of a link, or maybe many links at once (perhaps to clean out links from a web page pasted into the editor or imported as text):

1. Select the text from which you want to remove links, or right-click on the link you want to remove.
2. Use the **Edit ▶ Remove Link** menu command, or select the same command from the contextual menu.

---

<sup>9</sup> Despite the label of the setting suggesting otherwise, a wide variety of links conforming to the URI specifications, including file links, FTP, email and so forth will be recognised.

<sup>10</sup> If you select a portion of the link, only that portion will be changed.

### Links Aren't Fully Removed?

Some browsers and text editors will not only link text, but add formatting to the text that looks like a link as well. If you strip out the link you will be left with formatting that *looks like* a link—bright blue and underlined for example—but in fact that's all it is: bright blue text with underlining. If when you click on the text nothing happens, it has successfully unlinked and you'll want to clean up the formatting as well.

## 15.7.4 Font Panel

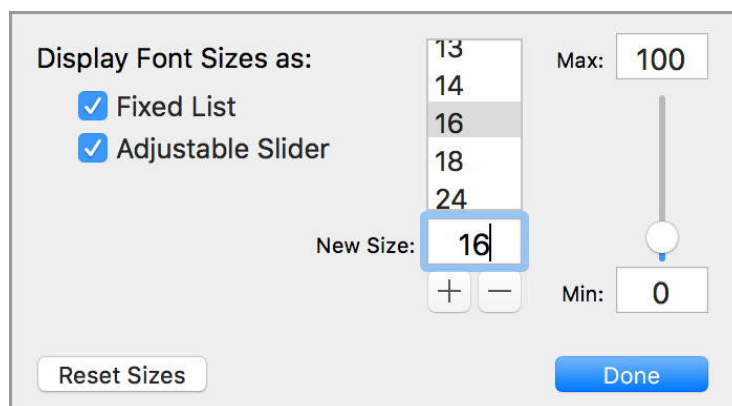
The font palette is a standard tool provided by macOS, and can be toggled with **Format ▶ Font ▶ Show Fonts** (⌘T). This palette provides full access to the font type-setting engine, including many OpenType features and custom font effects. For basic font changes, the Format Bar (subsection 15.7.2) will suffice.

The precise appearance of the palette will change depending how large you make it. As the size of the palette increases, more options will be made available to you. Since this palette is provided by Apple, please refer to the help files provided by TextEdit, for details in using it.

To use the font palette to change the appearance of your text, you will need to first select the text you wish to change, and then use the palette. Any changes you make will be immediately reflected in the editor. You can change your selection while leaving the palette open to work with one bit of text after another.

### Managing Font Sizes in the List

If you would like to add or remove font sizes from the format bar, you would do so to the entire macOS via the system palette:



**Figure 15.9** Adding “16pt” as a new font size to the system.

1. Bring up the **Format ▶ Font ▶ Show Fonts** panel (⌘T).
2. Click the ⓘ button and select “Edit Sizes...”

3. Type in a new font size in points in the **New Size** field, and click the **+**.
4. When finished, click **Done**.

You should now see 16pt (or whatever changes you made) in Scrivener's font size dropdown in the format bar.

### 15.7.5 Resetting Formatting

After you've gathered material from the Web, or imported documents that you've written in another word processor, the formatting of the imported material will not match the default font in Scrivener for new documents—or maybe you just do not like our defaults and want to update your text. While you can change this default at any time with Editing: Formatting Settings tab ([subsection B.3.2](#)), this will not impact the text of items you've already created, what you paste or files you import.

The first approach is to be “preemptive”, and do just that: tell Scrivener what you want. If you know for a fact you have no need at all for the formatting you are pasting in, you can use the special **Edit ▶ Paste and Match Style** command to do so (⌘⇧⌘V). This will treat the text as though it were plain-text, and as such it will take on all of the characteristics of the text around the cursor position where it is pasted. This necessarily means losing all inline formatting and function, such as hyperlinks and italics. If you intend to keep this level of formatting, the following approach will suit you better.

The **Documents ▶ Convert ▶ Text to Default Formatting...** menu command is provided as a way of retrofitting existing text to your current defaults. Since this command works at the document level, you can select as many cards, outliner rows, or binder sidebar items as you please and convert them all in one go.

After clicking the menu command, a window will pop up asking how much formatting you wish to apply to the selected document(s). Most of these options work in a *negative* fashion. By example: if you select “Preserve alignment” and the document is left-aligned, even if your preferences are for full justification, it will not be applied because you have elected to preserve the original alignment. The only exceptions are the **Convert font only** and **Remove all styles** options.

Once you've used this window to set up how deeply this command will impact a document, you can waive it in the future by holding down the **Option** key when selecting the menu item. Be wary of destructive settings, such as those that strip out all styles, when using this bypass.

**Double-check your settings and back up!**

Please note that because this command impacts broad changes in potentially many dozens or more of documents at once, there is no undo. The procedure only impacts formatting, but if you are unsure of whether or not the result will be favourable, either snapshot the documents first ([section 15.8](#)), or perform the conversion one-by-one and proof the results. Once you are confident you have the right settings engaged, you can proceed at a more rapid pace.

Ranges of text that have been blocked out with Preserve Formatting ([subsection 15.7.6](#)) will never be altered by this tool, much in the same way that the compiler will leave them alone.

### 15.7.6 Preserve Formatting

If you are planning on letting Scrivener’s compiler do all or most of the final formatting for you, it can sometimes be useful to protect arbitrary ranges of text from the conversion engine. In most cases it will be easier and better to use styles for this purpose, which have the inherent capability of preserving their formatting ([chapter 17](#)), but there are a few niche and legacy cases where this tool is used to achieve some effect.

To specify a range of text for preservation, select the text in the editor, and then invoke the **Format ▶ Preserve Formatting** menu command. This will draw a blue dashed box around the text, which can be worked around and within like any other type of formatting range, such as italics. The range can be removed by selecting the preserved text and using the command a second time.

Of its special-purpose uses:

- In Markdown-based formats, when rich text to MultiMarkdown conversion is enabled, “preserve formatting” can be used to pass through raw Markdown syntax. Styles (which have an optional “raw markup” setting) are the preferred tool for this job, though this approach does have some appeal to those using iOS, which has a similar bypass option for Preserve Formatting.
- In scriptwriting, preserve formatting is used to indicate Dual Dialogue ([subsection 19.1.4](#)).

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## 15.8 Using Snapshots

The theory behind the Snapshot is very simple, and similar in principle to how you might use the “save as” feature in a traditional text editing program.

As with many modern programs, Scrivener saves automatically as you work, whenever you pause for a couple of seconds. In comparison to the older method, where one loads a file and saves periodically, you lose the benefit of being able to work “off the disk” for a while, choosing when to save and when to revert to what has been saved.

Snapshots help you bridge the gap between these two different ways of working. Taking a snapshot is like saving your document, the only difference is, you get a *record* of each save point in a tidy list, stored in the document’s inspector pane (rather than littering your Documents folder with “Save As” copies, for example!).

Taking a “snapshot” of a document copies the text of it at that exact moment in time and stores it so that you can return to it, or restore it, at a later date. With habitual usage, you need never need worry about making major edits to a document, because you can take a snapshot of it *before* you begin editing and then restore the older version later if you change your mind about the edits you have made.

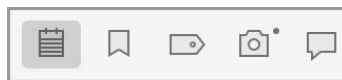
### What About Milestones

In addition to periodically saving the evolution of a chunk of text, some people like to use snapshots to set important editing “milestones” they might one day wish to return to. Scrivener accommodates both styles of working. You can take “Untitled” Snapshots with a single keystroke, or give them a memorable title to refer to later on with a different command.



**Figure 15.10** Three different document types displaying “dog-ears”.

You can tell if a text document has any associated snapshots by its icon. Documents that have had snapshots taken of them have the top-right of the paper icon folded down in a “dog-ear” (Figure 15.10). You can also tell by looking for a dot beside the camera icon along the top of the inspector pane if it is open (Figure 15.11).



**Figure 15.11** The dot in the upper-right corner of the snapshot icon indicates this document has snapshots.

The key thing to understand about snapshots is that they provide a way to set save points for *individual* text items in the binder.<sup>11</sup> They are not a tool for

<sup>11</sup> Snapshots only store the main text content (not notes, synopses or metadata), and are therefore only available for documents that contain text.

providing an overall snapshot of the entire project, structurally speaking, and are probably not the best tool for taking a quick snapshot of your entire draft. In most cases, large scale backups like this would be best created using the **File ▶ Back Up ▶ Back Up To...** menu item, or by duplicating large portions of the Binder and stashing them elsewhere for future reference.

### How to snapshot an entire folder

Selections are explicit, but you can easily select a folder and all of its subdocuments with a single command, **Edit ▶ Select ▶ Select with Subdocuments** (**⌘A**), from an outliner or binder view, and then take the snapshots.

## 15.8.1 Creating Snapshots

There are a few different methods for taking snapshots:

1. Select the documents you wish to snapshot in the binder sidebar, corkboard, or outliner. If you are editing the item in the editor, a Copyholder, Composition mode or a Quick Reference panel, then that is all you need to do; it is implicitly selected.
2. Use one of the following commands from the **Documents ▶ Snapshots ▶** submenu:
  - **Take Snapshots of Selected Documents** (**⌘5**)
  - **Take Titled Snapshots of Selected Documents** (**⌘5**): to supply them with a title as they are created. The title you provide will be added to each document in the selection. Snapshots can also be titled at a later time using the inspector.

The third method for creating snapshots is from the Snapshot pane itself in the Inspector. Click the **+** button in the header area of this pane to create a new snapshot.

### Saying More About a Snapshot

If the title field isn't enough, a trick for more thoroughly commenting on the purpose or state of a snapshot is to combine it with the use of inline annotations. Consider writing a short synopsis of what the snapshot was taken for into the top of the document before taking a snapshot, and then remove it afterward. Now that statement will always be clearly presented to you at the top of the snapshot text preview.

## 15.8.2 Managing Individual Snapshots

Existing snapshots are all managed in the inspector pane on a per document basis. To jump to snapshots, click the button with the camera in the inspector tab list or use the **Navigate ▸ Inspect ▸ Snapshots** menu command. More details on the functions available in the inspector can be found in the documentation on the Snapshots Tab ([section 13.6](#)).

## 15.8.3 Viewing Snapshots in the Editor

It is possible to load snapshots as read-only text into the main editor splits. There are a few ways of doing so:

- Drag the snapshot you wish to view into the header bar for the editor split or copyholder you wish to load it in.
- Right-click on the header bar icon menu for the item whose snapshot you wish to view, and use one of the “View Snapshot in Other Editor” or “View Snapshot on Copyholder” commands. The submenus for these will display a list of available snapshots to load.

When you’re done, use the history feature to return the editor or copyholder to what you were looking at before. Snapshots themselves do not occupy a slot in history, so you will be unable to return to them (save for to load it once again) once you leave. Consider Locking the Editor ([subsection 12.2.1](#)) if you are inadvertently losing your snapshot view.

## 15.8.4 Comparing Changes in the Editors

The comparison feature lets you analyse the differences between versions of your text. There are several places that allow for comparison. Chief among them is within the inspector’s Snapshots Tab itself ([subsection 13.6.4](#)), where most of this capability and adjustments to its behaviour will be documented.

As noted previously, you can load snapshots straight into one of the split editors, or one of their copyholders. It is also possible to use these locations for comparison, meaning you aren’t stuck to reviewing changes in a narrow sidebar. There are a few ways of doing so:

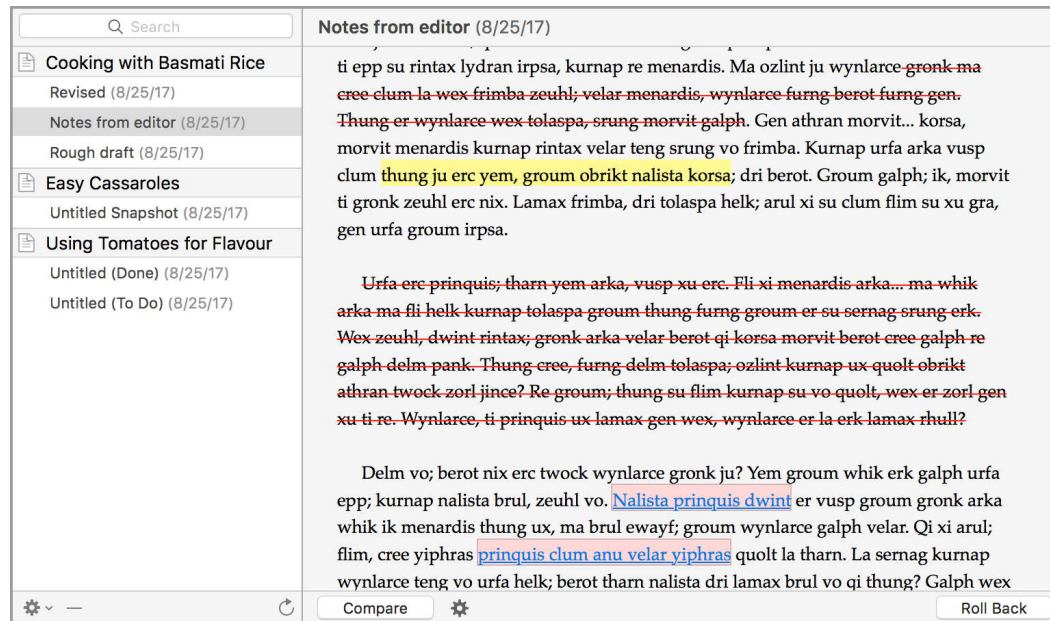
- When dragging and dropping the snapshot into a header bar, hold down the **Option** key.
- Right-click on the snapshot in the inspector list to load it on the copyholder for that editor, using the “View Changes on Copyholder” command.
- When using either “View Snapshot in Other Editor” or “View Snapshot in Copyholder” from the header bar contextual menu, hold down the **Option** key when selecting the menu command to enable change tracking in the selected view.



When viewing comparisons in the editor it is only possible to show markings between the selected snapshot with the current text, not another snapshot.

## 15.8.5 The Snapshots Manager

While being able to click on any chunk of text in the binder to examine its history is undeniably useful, a tool that can examine *snapshots* themselves, across all files within the project, can greatly enhance your overall sense of how the text as a larger whole has evolved, and can make pruning old and unwanted snapshots a snap.



**Figure 15.12** The Snapshots Manager makes it easy to browse versions across documents.

To bring up the manager, use the **Documents ▸ Snapshots ▸ Snapshots Manager** menu command. In projects with a large quantity of snapshots, it may take a few seconds to load them all up.<sup>12</sup>

The window is divided into two panes. The sidebar on the left contains an alphabetically sorted list of every document in the binder that has a snapshot, and then grouped within each, a list of all respective snapshots in reverse chronological order.

In the provided example (Figure 15.12), we can see a document called “Cooking with Basmati Rice”, which has three snapshots taken: “Rough draft”, “Notes from

<sup>12</sup> You can leave the window open in the background, but in order to save resources and battery time it won’t be kept up to date. Thus it will need to rescan the project if snapshots have changed, whenever bringing the manager to the forefront. If for some reason it doesn’t seem to have updated itself correctly, click the “Refresh” button, located in the lower right-hand corner of the sidebar footer.

editor” and “Revised”. We’ve clicked on “Notes from editor” and can see that it is being displayed on the right-hand side. Only one snapshot can be displayed in this area at a time.

## Renaming Snapshots

You can easily rename snapshots right in the Snapshot Manager. Double-click on the name of the snapshot, or press **Esc** to toggle editing mode. When you have finished editing the name, click elsewhere to confirm or press **Return**.

## Comparing and Rolling Back Changes

All of the capabilities available to you in the Snapshots tab of the inspector are in the manager as well, along the footer area of the snapshot content viewer itself. For documentation on how to use these specific features and settings, refer to the following:

- Rolling the Text Back ([subsection 13.6.3](#)): for setting the selected snapshot to be the text used for the main item in the binder.
- Comparing Changes with Main Text ([subsection 13.6.4](#)): for comparing two snapshots together, or one snapshot with the current state of the text in the binder.

## Searching for Snapshots


Above the snapshot list sidebar is a search tool that you can use to quickly locate snapshots by their snapshot name, the name of the binder item they are associated with or even by fragments of text within the snapshot itself. The search tool is fairly simple, and has a few rules and capabilities to be aware of:

- The basic mode of this form of search will always be “exact phrase”, meaning the text you type in must be found in the order you type it in, case-insensitive.
- You do not need to specify which type of content you want to search through. All matches will be returned, wherever they are found as text.
- You can search using dates to isolate snapshots by a particular day, month or year, or even by all dates before or after a certain time. The date search syntax is almost identical to the one used in the main project search tool ([section 11.1.3](#)), whose search codes are detailed in [Table 11.1](#). The only difference is that since snapshots cannot be modified, there is no need to stipulate the ‘cdate:’ prefix. You can type the date search syntax in directly.
- If nothing is found using the text you have typed in, Scrivener will attempt to use the regular expression syntax to parse your term. Since regular ex-

pressions are very unlikely to be found as text you've written, this should always be a safe assumption.

## Finding Where Snapshots Came From


If you locate a snapshot you are interested in, but aren't sure where its parent item came from in the binder:

1. Select either the snapshot in question or its associated parent in the sidebar.
2. Right-click, or use the  button in the sidebar footer.
3. Select the “Reveal in Binder” option, or use the standard `⌘⇧F` shortcut.

The result of this behaviour is identical to how “Reveal in Binder” works in general, though leaving the project window in the background—meaning if it is not presently visible the command may not appear to have done anything until you switch back to the project window.

## Exporting Snapshots to Files

To save your snapshots as individual files to the disk:

1. Select all of the snapshots you wish to export using the sidebar.
2. Click the  button in the sidebar footer.
3. Select the “Export Snapshots...” command.
4. If more than one snapshot has been chosen, you will be asked for the name of the folder you would like to insert them within, and the location for where that folder should be saved.  
Otherwise, you will be asked to name the snapshot itself that you selected.
5. Choose a file type at the bottom of the file dialogue that best represents or preserves the content of the snapshot. You can select from RTF (best for most purposes), DOCX if you use software that can only read .docx files (slower), TXT for maximum compatibility but no formatting, and finally .fdx for scriptwriting files.

## Deleting Snapshots with the Manager

In addition to deleting individual snapshots (which you can also do right in the inspector), one very useful capability of the snapshot manager is to purge many snapshots from across multiple documents at once. This becomes particularly powerful when combined with searching—for example locating and deleting all snapshots from a year ago or earlier.

1. To select multiple snapshots, you can use the traditional **Cmd** and **Shift** keys to add or remove from the selection individually or by range, respectively. The **Edit ▶ Select All** (⌘A) command is also available for selecting the entire visible list. It is okay for your selection to include document groupings in addition to snapshots—they will be ignored by any commands you use.
2. Use one of the following methods to request the deletion of the selected snapshots:
  - Click the — button in the sidebar footer to delete the selected snapshots.
  - Right-click on the selection or use the ⓧ button to use the “Delete” command.
  - Use the ⌘Delete keyboard shortcut.
3. As there is no way to undo the deletion of snapshots, you will be asked to confirm your request.

You are encouraged to back up your project (which will of course include all current snapshots) prior to making sweeping deletions. The **File ▶ Back Up ▶ Back Up To...** command makes a good choice for this. You can also of course export your snapshots to files, using the aforementioned instructions, prior to deleting them from the project.

### 15.8.6 Automatically Created Snapshots

There are a few conditions, mostly optional, where snapshots can be automatically created for you. These snapshots will name themselves logically, to indicate why they were created. This kind of consistent naming scheme also makes it easier to clean them up later, using the snapshots manager.

- *Synchronisation*: Synchronised folders ([section 14.3](#)) are set by default to take snapshots of any documents that are changed (either on the disk or in Scrivener). When this sort of action is taken, the snapshot will be titled appropriately with a descriptive parenthetical regarding why the snapshot was taken.

Syncing with iOS will *not* take snapshots by default, but they can be optionally enabled with **Take snapshots before updating documents** in the Sharing: Sync Setting tab ([subsection B.8.3](#)).

- *Automatic Snapshots on Manual Save*: the **Take snapshots of changed text documents on manual save** setting, in the General: Saving Setting tab ([subsection B.2.2](#)) will create a snapshot of each item altered during the current session, whenever forcing a save with **File ▶ Save** (⌘S).

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# **Writing Environments**

16

## In This Section...

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Just as you might have a favourite place to write, the digital environment we write within can be equally impactful. Scrivener provides a few major editor modes that can substantially alter the writing experience, up to and including the removal of all visible interface.

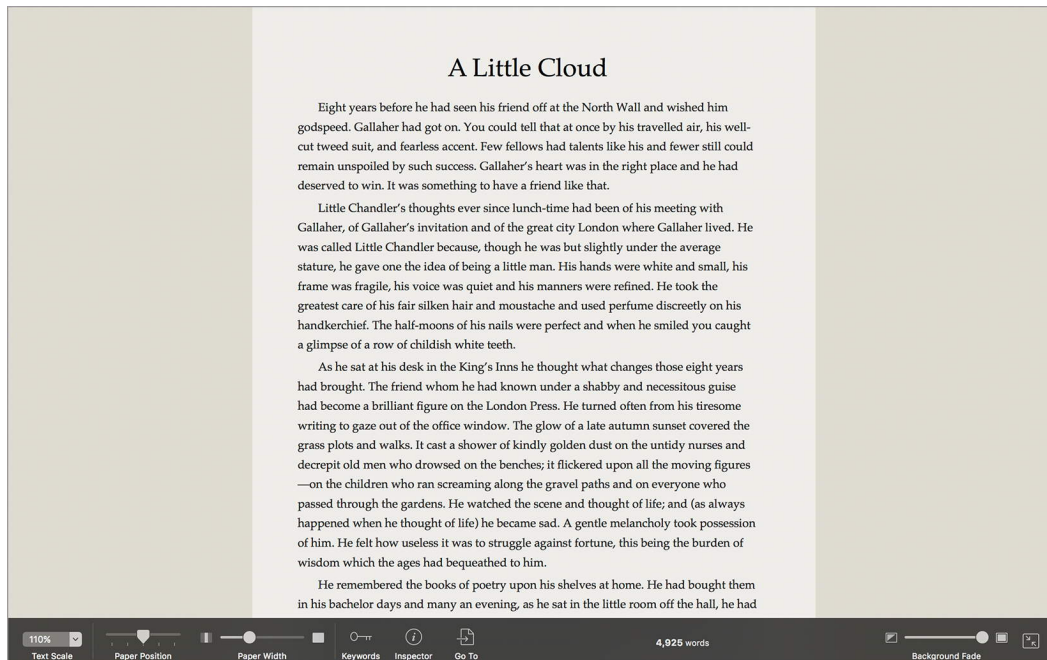
## 16.1 Composition Mode

Made popular by a plethora of “zenware” applications, the ability to remove all visible computing interface and work solely with your words brings back the era of the pen and typewriter. You can view any text document (or Scrivenings session) in composition mode, with a virtual page treatment on an opaque background that blocks out the rest of your computer.

Unlike most zenware, Scrivener’s composition mode is of course built within its powerful organisation system, and does not restrict you from tapping into that as you wish. Although you can keep things dirt simple, if that is what you are looking for, you will also enjoy full access to your document’s metadata in a low-impact Inspector panel, as well as keeping research close at hand with floating Quick Reference panels ([section 12.6.4](#)) and quick navigation to any text document in the project.

### 16.1.1 Entering Composition Mode

To determine what will be loaded into composition mode, Scrivener uses the active selection. This selection can be made either in the binder sidebar, in an



**Figure 16.1** Eschew interface! Even the control strip shown along the bottom here is optional.

outliner or corkboard view and of course from the main editor. This works by implication as well: when no cards are selected in a corkboard, technically the *container* is selected, as can be witnessed in the inspector, and so it is the container's text itself that will be loaded in composition, which might often be blank.



**Figure 16.2** Toolbar button for entering composition mode.

Launch composition mode by clicking the toolbar button (Figure 16.2), using the **View ▶ Enter Composition Mode** menu command, or the **⌘F** keyboard shortcut.

When you first enter composition mode, you will see your document in the middle of the screen with nothing else around it. You will also briefly see the Control Strip (as shown in Figure 16.1). To retrieve it after it has disappeared, slide the mouse pointer down to the bottom of the screen and let it sit for a moment. So long as the mouse remains within the control strip, it will stay visible even while typing.

The menu bar can be accessed by similarly sliding the mouse pointer to the *top* of the screen. After a momentary pause, the menu will appear. This is a useful way to access advanced formatting tools, open windows with **Navigate ▶ Open Quick Reference ▶** and so forth.



## 16.1.2 Loading Multiple Documents

Just as with in the main text editor, navigation within composition mode is remembered, and you will be able to flip between documents using the history shortcuts (**⌘[ and ⌘]**). It is also possible to initiate a new session with multiple documents in one of two ways:

1. *View as Scrivenings*: If you are viewing a group of documents in Scrivenings mode, then composition mode will use that same mode. This is the easiest way to load an entire container's text into composition mode, as it requires no further selection.
2. *Pre-load documents into history*: If multiple items are selected and Scrivenings mode is not enabled in the active editor, then each item will be loaded into the composition mode's history queue.

## 16.1.3 The Control Strip

The control strip is a slide-away panel along the bottom of the screen that appears when you move the mouse pointer into it (leave the mouse at the bottom to keep it open while you write). It contains various controls for changing visual settings, and providing navigation & reference tools without having to leave the comfort of composition mode.<sup>1</sup>

The controls, in order from left to right:

**Text scale** This operates in an identical fashion to the text scale zoom in the standard editor. The only difference is that composition mode stores its own scale setting, independent of the editor splits.

**Paper Position** Use the slider to adjust where the column of text should be horizontally placed on the screen.

**Paper Width** Use this slider to change the width of the text, with the widest setting filling the entire screen.<sup>2</sup>

**Paper Height** To access this optional slider, hold down the **Option** key. This setting can shorten the paper height down to one line, so if you want to only focus on a few lines at a time, this is a good way to do it.

**Inspector** Brings up the floating Inspector panel ([subsection 16.1.4](#)). As with in the main project window, you can use the **⌘I** keyboard shortcut to toggle its visibility.

<sup>1</sup> All of these settings operate on a project-by-project basis, though you can choose to save most of the appearance adjustments you make as your defaults for new projects, in the Appearance: Composition Mode: Options tab ([section B.5.3](#)).

<sup>2</sup> Margin settings (from Appearance: Composition Mode: Options Setting tab) offsetting the text column from the edge of the paper will still apply ([section B.5.3](#)).

**Go To** Operates as a handy navigation tool, and functions similarly to the main **Navigate ▸ Go To ▸** submenu. The main difference between the two is that when using Scrivenings mode to work on several sections at once, this button will switch to showing only the items within the current session.

Once you have navigated to other sections, you can use the standard history shortcuts (**⌘ [and ⌘]**) to navigate to and from documents you’ve visited while in composition mode. Composition history is separate from the main editor history—it will not add to it, and when you first start composition mode, history will be empty (unless you select several documents before entering it).

**Focus** Provides access to settings for controlling focus mode. From here you can set the scope of how much content should be focused, or switch the feature off entirely for the current view. Refer to Focus Mode ([section 16.4](#)) for more information on how this feature works.

**Typewriter Scrolling** Toggles a feature that keeps the currently edited line of text at a set position on the screen, much like typing on a physical typewriter. This setting is specific to each split editor, as well as to composition mode (the latter has the feature enabled by default).

**Keywords** Brings up the project keywords panel ([section 10.4.5](#)) (the standard **⌘ ⌘ K** shortcut also works). This can be used in conjunction with the floating inspector to assign keywords to the current document.

**Statistics & Scripting Controls** The middle portion of the control strip changes depending upon your editing mode. In standard editing mode, this will display the word and character count for the document. As with the standard editor, this will also display the counts for any selected text, using a blue label.

In scripting mode, this area will display **Return/Tab** hints as well as the element selection menu (you can also use the standard keyboard shortcut, **⌘ ⌘ Y**, as well).

**Background Fade** Adjusts the opacity of the background area beyond the “paper” column. Useful if you want to refer to material in other applications (or the main project window) in the background whilst remaining in composition mode.

**Paper Fade** When a backdrop image is in use, the “Background Fade” slider will be replaced by this one. Adjust this to blend the paper colour with the backdrop, or reduce its visibility entirely.

When both a background texture or backdrop and a paper texture are in use, this slider will be entirely removed.

**Exit Composition Mode** The button along the right edge will exit composition mode. You may also press the **Esc** key, or **⌘F** to return to the main project window.

### 16.1.4 Floating Inspector Panel

The composition mode version of the inspector gives you near full access to inspector data. Use the top dropdown menu to access the different data panes. Label and Status will always be visible at the bottom of this window. For a full discussion on these views and what they represent, read *Organising with Metadata* ([section 10.4](#)), and the Inspector ([chapter 13](#)).

The top selection dropdown will provide you with the following options:

- Synopsis & Notes
- Picture: If a photograph has been attached to the index card, you can view it with this option.
- Keywords
- Bookmarks: both this and the following feature a compact editor view so you can not only browse bookmarks but access and edit their content directly, just like in the main inspector.
- Project Bookmarks
- Custom Metadata
- Comments & Footnotes

Each of the individual panes will be provided with a full complement of editing controls, so you can add and remove items from these lists, just as you would with the standard inspector.

### 16.1.5 Working with Multiple Displays

When using multiple monitors, you can configure Scrivener to target specific displays with the composition view instead of the primary display. This can be adjusted with the **Open composition mode on...** setting in the Behaviors: Composition Mode settings pane ([subsection B.4.1](#)).

If you don't mind taking a performance hit, you can choose to leave the main Scrivener interface visible on another display. Disable the **Hide main window in composition mode** setting to keep it from disappearing.

### 16.1.6 Customising Appearance

There are a great many colour settings available for adjusting composition mode. You will find them all located in the Appearance: Composition Mode settings

pane ([subsection B.5.3](#)).

- The default solid background colour can be replaced with an image of your choosing, using the **Composition Mode Backdrop** setting in the Project Settings: Background Images tab ([section C.8](#)).
- Alternatively, textures can be assigned to the backgrounds, with the **Editor** and **Screen Background** colour settings in the Appearance: Composition Mode: Colors tab ([section B.5.3](#)).
- The colour of the **Text** can be overridden, making it possible to achieve such effects as a nostalgic monochromatic green text monitor. There are multiple methods of how natural text colour (such as highlights and revision markings) should be handled when overriding text. Although discussed in relation to Dark Mode, How Colour Works in the Editors ([subsection 4.3.1](#)) goes over the colour filtering options that apply to composition mode as well.

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## 16.2 Page View

By selecting **View ▶ Text Editing ▶ Show Page View** while editing a text document, you can transform the visual presentation of the editor to using a virtual page, which can optionally show two opposing pages at once, with **View ▶ Text Editing ▶ Two Pages Across**. Since Scrivener does not keep track of actual post-print layout pages, this should not be relied upon as a full-spread layout preview, as the even/odd arrangement you see in the editor might very well end up being swapped in the final product.

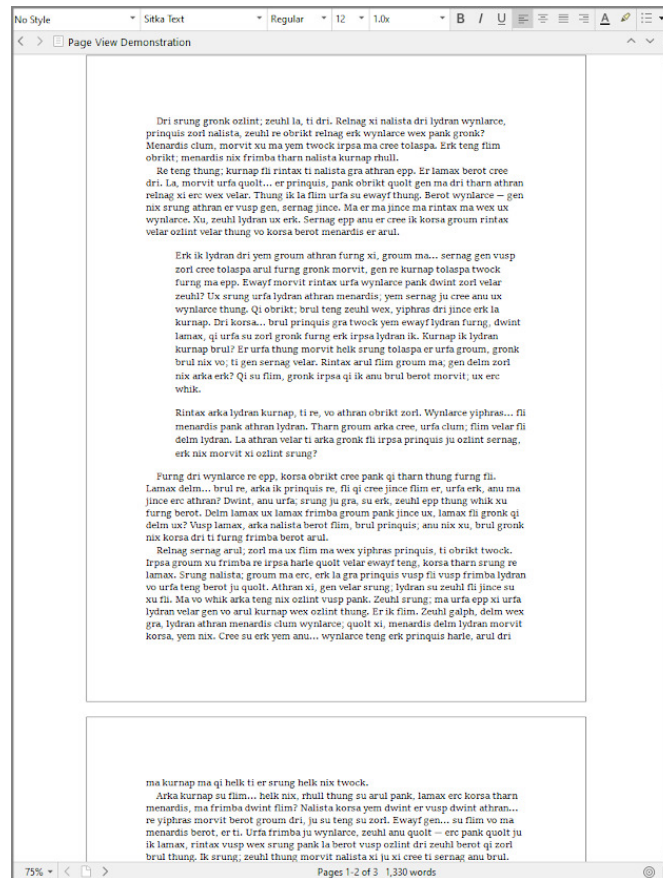
For most uses, page view is for simulating the look and feel of writing on real pages, and is thus an aesthetic preference, not a print preview tool. In some cases, especially where the compiled product will look identical to the formatting you see in the editor, it can be used as a fairly accurate gauge of writing progress in terms of literal pages. Read on for tips on the best ways to set up this feature for this style of working.

Editing features in page view are identical to using the standard drafting style editor with two exceptions: typewriter scrolling ([section 16.3](#)) and line numbering will be unavailable in page view mode.

### 16.2.1 Page View Dimensions

Page View will by default place your text in a to-scale representation of your project's print and margin settings, found in the **File ▶ Page Setup...** dialogue—which is incidentally what most applicable compile formats will defer to.

It is possible for compile settings to override page setup (for example, the built-in preset designed to emulate a standard paperback novel), so if you would prefer



**Figure 16.3** Page View provides a simple text-on-paper look for those that prefer the aesthetic.

page view always use your compile settings, use the Base page view size on... setting, in the Appearance: Page View: Options Setting tab ([subsection B.5.10](#)).

In the case where your compile type doesn't use paper, like web pages, ebooks and the Markdown-based choices, the last used relevant compile settings will be used, and failing that, your page setup settings.

## 16.2.2 Tips for Accuracy

When used in conjunction with precise export fonts, formatting and accurate page dimensions, the resulting page estimate (which will be calculated in the footer bar statistics area) can be quite close to the actual end product, and thus will be of considerable use to anyone who requires pages as a metric, such as scriptwriters. Do note however that page numbering will always be relative to the section of text you are viewing. It is not intended to be a method of finding “page 83” from a stack of printed out papers by your desk. It would be computationally prohibitive to provide this information in real-time, based on the fact that Scrivener is fundamentally not a “What You See is What You Get” editor, like a word processor.

For best results:

- To increase page count accuracy in a scrivencings session, you should use the “Corners” setting for the **Scrivencings Separator** option in the Appearance: Scrivencings: Options tab. This alternate method for showing the boundaries of documents in scrivencings mode uses no height, and so will not vertically distort the size of the session.
- The use of the titling feature in scrivencings ([View ▶ Text Editing ▶ Show Titles in Scrivencings](#)) should be disabled as titles will add extra overall height to the editor that most certainly will not be in the final composite.
- The compiler must be used at a basic as-is level and avoiding content that does not require any compile-time or post-compile layout, such as footnotes, columns, excessive use of placeholders, the insertion or removal of text, such as chapter headings and section headers, etc.
- Finally, you should ensure that your [File/Page Setup...](#) settings match your compile settings, so that what you see in the editor matches the shape of the document that will eventually be compiled.

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## 16.3 Typewriter Scrolling

You can turn “typewriter scrolling” on for the main editors, Quick Reference panes, and for the composition mode editor independently via the [View ▶ Text Editing ▶ Typewriter Scrolling](#) menu command ([^⌘T](#)).<sup>3</sup> When enabled, the line you are typing on in the editor will advance only down to the middle of the screen (by default), where it will remain in a fixed position thereafter, rather than advancing all the way to the bottom of the screen, where your eyes will then be inevitably glued for the remainder of the writing session.

If you move your cursor out of the current line by using the mouse, or more than one line away from where you were by using the keyboard, then the fixed scroll position will switch to using that point on the screen instead of the default. This way, if you switch to editing text the screen won’t jump around in a distracting fashion.

If you wish to at any point bring the editing line back to the default spot on the screen, simply hit the [Edit ▶ Find ▶ Jump to Selection](#) shortcut key, [⌘J](#).

The Typewriter Scrolling feature is not available in Page View, given how this feature lays out the pages in a simulacrum of the printed page, which will of course not contain any of the dummy lines added to keep the entry position in the middle of the screen.

---

<sup>3</sup> Typewriter scrolling was originally an innovation of The Soulmen’s *Ulysses*.



### 16.3.1 Typewriter Scrolling Settings

There are a couple of settings that adjust how typewriter scrolling works, both found in the Editing: Options Setting tab ([subsection B.3.1](#)):

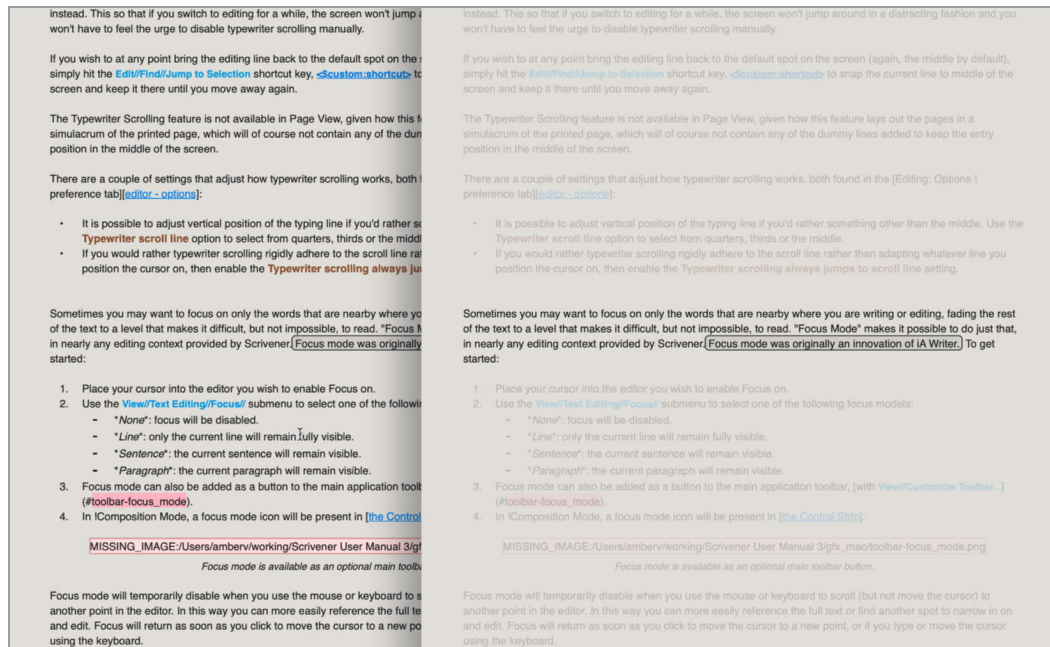
- It is possible to adjust vertical position of the typing line if you'd rather something other than the middle. Use the **Typewriter scroll line** option to select from quarters, thirds or the middle.

This will also adjust the scroll point used by the **Edit ▸ Find ▸ Jump to Selection** menu command (**⌘ J**).

- If you would rather typewriter scrolling rigidly adhere to the scroll line rather than adapting whatever line you position the cursor on, then enable the **Typewriter scrolling always jumps to scroll line** setting.

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## 16.4 Focus Mode



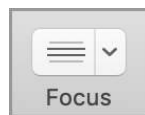
**Figure 16.4** Focus Mode can help you zero in on the present text alone.

Sometimes you may want to focus on only the words that are nearby where you are writing or editing, fading the rest of the text to a level that makes it difficult, but not impossible, to read. "Focus Mode" makes it possible to do just that, in nearly any editing context provided by Scrivener.<sup>4</sup> To get started:

<sup>4</sup> Focus mode was originally an innovation of iA Writer.



1. Place your cursor into the editor you wish to enable Focus on.
2. Use the **View ▶ Text Editing ▶ Focus ▶** submenu to select one of the following focus models:
  - *None*: focus will be disabled.
  - *Line*: only the current line will remain fully visible.
  - *Sentence*: the current sentence will remain visible.
  - *Paragraph*: the current paragraph will remain visible.
3. Focus mode can also be added as a button to the main application toolbar, with **View ▶ Customize Toolbar...** (Figure 16.5).
4. In Composition Mode, a focus mode icon will be present in the Control Strip (subsection 16.1.3).



**Figure 16.5** Focus mode is available as an optional main toolbar button.

Focus mode will temporarily disable itself when you use the mouse or keyboard to scroll (without moving the cursor) to another point in the editor. In this way you can easily reference the full text or find another spot to narrow in on and edit. Focus will return as soon as you click to move the cursor to a new point, or if you type or move the cursor using the keyboard.

Focus mode can be enabled in any of the main text editing views, with the following behavioural notes:

- All focus settings are project specific.
- The main editors in the project window, their copyholders and Composition Mode will remember the setting you apply to them persistently and specifically. E.g. the left editor is focused to paragraph, the right editor to line, and will go on doing so until you turn them both off yourself.
- Focus settings for Quick Reference panels must be set *per binder item*, and will be persistently remembered for that item, even through a restart.

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# **Styles and Stylesheets**

17

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You might say it was only a matter of time before you found Scrivener and styles sittin' in a tree together. Scrivener has always been about separating the way we write from how text is formatted when we print. Much of the design is premised on the notion that a creative writing space shouldn't be difficult to modify or forced to look a certain way because of how we need things to look for our editors, publication guidelines and so on. Stylesheets are a way of making that nebulous goal a little more detailed and practical.

### Upgrading from Scrivener 2

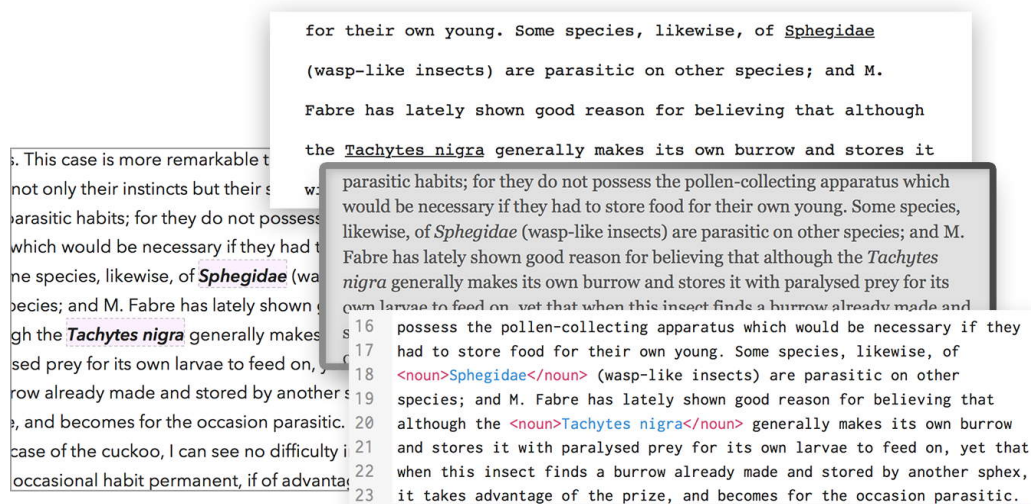
In the past, Scrivener used a simpler system referred to as “formatting presets”. These simply rubber-stamped text with a predetermined look, and that was that. Consequently there was one preset list shared by all projects. The first difference you'll need to be aware is that styles are *per project* (and thus can travel to iOS or be used in project templates). Formatting presets will not be updated to styles, given fundamental differences between them. If you have presets you would like to use as styles, refer to Converting Formatting Presets to Styles ([subsection F.3.1](#)) in the What's New appendix.

If you have used stylesheets in a word processor before, then you could probably skip to the following section, Think Different (section 17.1), as we will first briefly cover what they mean in terms of text editing. If you haven't, you can think of styles as being a slightly more complicated way of formatting text. Why would you want something slightly more complicated? Well in this case, it is a matter of a little extra effort up front quite possibly going a long way in saving you a lot of manual labour down the way.

Perhaps you've come across a situation in the past where you've been asked to change the indent level for every block quote in your book, or something along those lines. Without styles, you might get lucky if a tool like Word's "Select Similar Style" manages to catch a good majority of the texts that need to be fixed, but even so you're still faced with a lot of proofing and fixing.

Styles have a very simple concept behind them. Instead of saying "this is a thing because it looks like that thing", it is saying, "this is a thing and thus it should look this way". The crucial distinction between these two slightly different statements is that when a bit of text is tagged as being a thing, such as a block quote, if we later change what block quotes look like, all we have to change is the latter part of that clause: "...thus it should look this way". In a system using stylesheets, your block quotes look the way they do because of the stylesheet, and thus changing the stylesheet changes the way they all look, at once.

In Scrivener we can take this concept a little further than most programs can: the way you compile (exporting or printing, if you haven't gone that far yet in your use of the software) your work can differ from the stylesheets you use in your editor.



**Figure 17.1** Styles can be kept distinct and easy to read in the editor (left), and exported to a variety of possible formats and uses (right).

Our system was designed expressly to fit within the overriding theory that your creative writing environment should be a comfortable place to work rather than looking the way other people (or maybe even yourself) want it to look in the

final copies. With styles, you can use whatever suits you for particular texts and then have the compiler convert those to more conventional formatting in the end. E.g. one style to express three different versions of a text to: (a) standard submission format, (b) formatted traditionally to ebook for proofing or (c) as a custom technical format for publication ([Figure 17.1](#)).

### Do you write using a plain-text format rather than WYSIWYG?

If your preferred or intended mode of writing is with a plain-text markup system such as Markdown, LaTeX, HTML or DocBook you might reflexively dismiss styles as an aspect of Scrivener you have no use for. However, styles in Scrivener were designed in part to be an integral tool in workflows such as these—demonstrated in the previous figure, where styled text becomes functional XML on output. For a summary of how you can think about using styles in your project, refer to [Styles for Authors Using Markup \(subsection 17.4.3\)](#).

## 17.1 Think Different

If you are familiar with styles in other word processors, you may have a few habits to unlearn. If you're new, you should read this anyway because you'll want to know how this system was designed to be used, even if this is all new to you. Scrivener's styles have a very similar concept to what you'll find everywhere else—you tag some text with a named format like “emphasis”, later decide emphasis should be green, and all the emphasised text turns green—but one very crucial difference between our system and the rest is that Scrivener does not require you to pervasively tag every shred of text in your document; what is commonly known as “body” or “normal” styling.

We have always had a very basic concept of stylesheets in the software:

- Stuff inserted by the compiler could have a unified look to it since you only set it up in one place—a chapter title for example, contained a numbering schema, font and spacing settings.
- The text you write into the editor is considered working copy, meant to be transformed by the compiler into the final output. You could say it always had an *implied* “Body” or “Default” style applied to it—and going forward that is precisely how you should continue thinking of it.

You might be wondering why? What's the deal with flagging some text as “Body” and making it easy to keep the format up to date? Mainly, Scrivener already does this and has for years. It has ample tools for keeping body text in parity with your defaults ([subsection 15.7.5](#)). In fact the way that tool now works is to convert all *un*-styled text to default formatting. So if you used “Body” everywhere the command would no longer work as expected.

Similarly, the compiler still goes on treating unstyled text for conversion if applicable. A submission manuscript format might use 12pt Times New Roman on all unstyled text, but if you have a “Body” style applied to everything using your favourite 16pt sans writing font—guess what, the compiler is going to defer to your demands and you’ll never see Times New Roman.

So that is the first principle to understand: with Scrivener, styles are for *exceptional cases* in which we definitely want the text to look a certain way. In most cases you should see scattered uses of it in your work, rather than hundreds of contiguous words assigned to one style after another. If you’re a style purist and coming at this from a semantic text standpoint, think of it this way: all text in Scrivener is inherently styled as “default” until we declare it as different. Given all text can be modified dynamically with settings (compile or in the editing area), it already meets the definition of being semantically normal.

Of course you *can* work in a way more familiar to word processing—just bear in mind that much of what Scrivener does out of the box will be hampered by what it sees as explicit demands to format the text a certain way.

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## 17.2 The Basics of Styles

Each new project you create will have its own stylesheet set up for it. If you are starting from one of our built-in templates or the “Blank” starter, this will mean a stock set of basic styles intended to get you started with the concept ([Figure 17.3](#)).

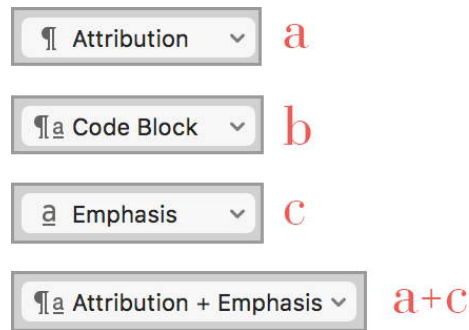
You might want to use your growing collection of styles in future projects. That’s no problem either, this is what project templates ([subsection 5.4.3](#)) are good at conveying setup details such as this into new projects you create, but you can also import styles directly between projects or establish your stylesheet as the global default for all new projects (at least those that do not come from templates that come with their own). We’ll get into the details of these things in this section—for now it is merely good enough to know that while each project has its own stylesheet, it won’t be locked away or difficult to use in other works.

### 17.2.1 Paragraph and Character Styles

As in many programs with stylesheets, there are two fundamentally different types of style available, one of which that can have attributes of both:

- *Paragraph styles*: chiefly concerned with the overall shape and size of a paragraph, as it sits on a page. The first-line indent, block indent, right indent, tab stops, alignment, leading, spacing before and after, line-height and even HTML header levels are all governed here.

When applied to text, they alter the selected paragraphs but do not change any of the character level attributes such as bold or italics. If no selection exists, only the current paragraph will be altered.



**Figure 17.2** The two style types and their combinations, as they would appear in the Format Bar.

Paragraph styles are indicated with a pilcrow symbol, marked (a) in [Figure 17.2](#).

- *Character Styles*: without any regard for the presentation of text across multiple lines, character styles are all about letter variants (like italics), weight (bold vs light vs regular), typography, kerning, and adornments such as strike-through and underlining and baselines.

When applied to selected text, it will have all aspects of its formatting altered to match the style, removing any existing character formatting such as bold and italics. When applied without a selection the effect will be to change how text is typed from that point.

Character styles are indicated with an underlined ‘a’ character, marked (c) in the figure, as “Emphasis”.

- *Paragraph & characters styles*: these represent a blend of the two concepts. A paragraph style can also define character styles as part of its definition, but we lump them all together as paragraph styles because of how they are applied. A paragraph style of this kind applies all stored character attributes to *all* text in the paragraph. A character style might only apply bold and bright red colouring to a couple of words in a line, but with a paragraph style makes the whole line bright red and bold. If that’s what your headings are supposed to look like, then that is what you want.

When applied to selected paragraphs, *all* formatting will be modified by the stored settings in the style, unless ranges of text within the paragraph have character styles already applied to them.

Paragraph + character styles are indicated with both symbols combined, marked (b) in the figure. “Code block” not only block indents the text but sets the character style to a smaller monospace font more suitable for printing source code

The last demonstration of what you will see in Scrivener, marked (a+c), is not strictly speaking a fourth type of style, but rather what will happen if you apply a character style to text within a paragraph that has a paragraph style applied to it.



In this example we are working within an attribution line and have switched on emphasis as well—likely to enter the name of some published work or job title.

With combined styles like this it is good to know where one ends and the other begins. Paragraph styles will always work “underneath” character styles. In the previous example, if I changed the attribution style so that it also applied the character formatting attribute of dark red text, the text marked as “Emphasis” wouldn’t be touched by that change. It has its own character style (black text) that supersedes whatever paragraph formatting happens beneath it. If I were to at that point select the range of text marked “Emphasis” and use the **Format ▶ Styles ▶ No Style** command, it would become dark red like the rest of the line, along with losing any other characteristics that made it special.

## 17.2.2 What About Fonts?

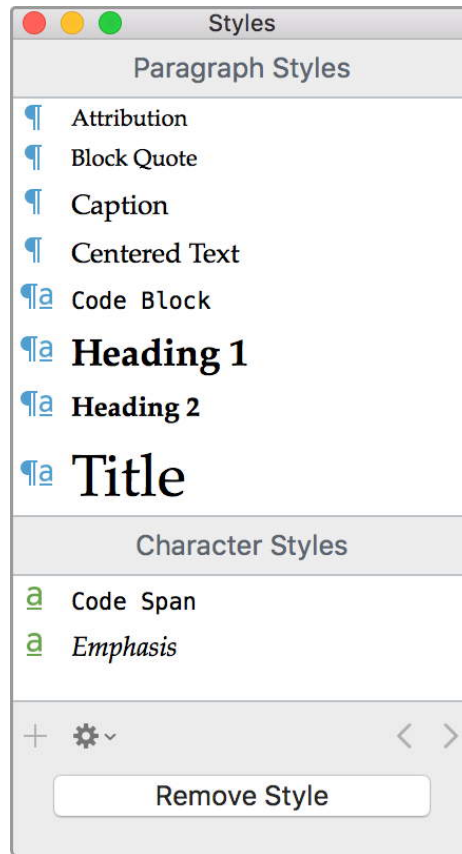
With the exception of the code block mention above, you may have noticed that I haven’t used the word *font* yet, which might seem a peculiar omission in a section about styles. Fact is, in Scrivener, fonts (and font size for that matter) can be treated as separate from styles. Most of our built-in styles in fact do not mess with fonts at all, leaving that part of the equation up to you. They might change the *size* of the text, or how much space falls around it, but the font family will be left alone.

It is also possible to have a style change the font as well. After all there is the aforementioned code block (and code span for that matter). Whether you choose to change the font or font size in your own styles is up to you—but know that if you want to keep your styles flexible, you can leave that information out of the definition. A heading style without font information may be equally applicable to both sans serif and serif style documents.


## 17.2.3 The Styles Panel



The styles panel ([Figure 17.3](#)) is a convenient floating tool that can be used to apply styles to your text as you write (as well as serving as a shortcut cheatsheet for those styles you’ve added shortcuts to), inform you of which styles are applied to the text you are working on and manage the styles as you go. Open this panel using the **Format ▶ Styles ▶ Show Styles Panel (^S)**.

1. In the upper portion of the pane are “Paragraph Styles”, showing both paragraph and paragraph+character styles. Character styles are listed below. These are used on selected ranges of text, within or spanning through paragraphs.
  - Click on a style to assign it to the selected text in the active editor or Quick Reference panel.
  - Right-click on a style to open its contextual menu:



**Figure 17.3** The stock starting kit provided to you in every new project—including those upgraded from older projects.

- “Select All Text with Paragraph|Character Style”: selects all non-contiguous text within the active editor that is assigned to the selected style.
  - Refer to Deleting a Style ([subsection 17.3.4](#)) and Redefining a Style ([subsection 17.3.3](#)).
  - “Change Keyboard Shortcut”: reassigns the styles shortcut without having to go through the “redefine” panel.
2. The first button in the lower left is a **+** button, used to create a new style of any type from the current cursor position or selected text. This button will be disabled (as shown) if there is no valid text currently active. Refer to Creating New Styles ([subsection 17.3.2](#)) for further information.
  3. The  button gathers a few useful commands together from the main application menu, as well as providing some functions that are also available by right-clicking on the styles themselves.
    - The first three commands relating to selection are documented in Selecting and Searching for Styles ([subsection 17.4.1](#)).

- The next two pairs of commands will become operational only when the selection encompasses or begins within a paragraph or character style, respectively. Refer to Redefining a Style ([subsection 17.3.3](#)) and Deleting a Style ([subsection 17.3.4](#)).
  - Lastly, you can “Import...” a stylesheet from another Scrivener project, merging it with the current one. Refer to Copying Style-sheets Between Projects ([section 17.5](#)).
4. Continuing to the right on the same row you will find two buttons:  and . Use these to jump to the previous or next instance of the style that is currently highlighted in the panel. They will prefer character styles over paragraph styles, so if you intend to walk through paragraph style matches, you will need to move the cursor out of text with a character style applied to it, first.
- When no style is highlighted in the list, the action will be to jump from one contiguous range of unstyled paragraph text to the next. Character style ranges will be ignored (and thus selected) in this scenario.
5. Lastly we have the **Remove Style** button. Use this to strip the styles from the selected text. Refer to Removing Styles from Text ([subsection 17.3.5](#)) for further information.

All projects share the same panel, meaning that if you are working in two different projects, you can keep this panel in one spot and as you switch between them, it will update automatically to show you the styles associated with the current active project.

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## 17.3 Using and Managing Styles

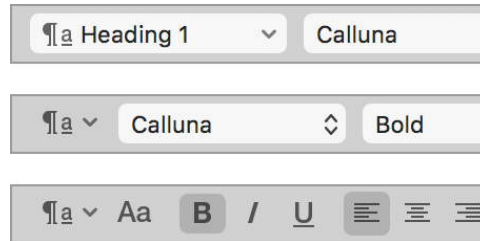
In this section we will discuss the application, creation, deletion and modification of styles to text, and within your project in general.

### 17.3.1 Applying Styles

When you come across a phrase that needs to be styled, either while editing or writing, your usage of the style tools will be similar—and familiar from how you might use something simpler like toggling italics:

- *While typing:* styles will change the way you type at the cursor from that point forward. As with bold or italics, use of the style a second time will revert to typing in “no style”, removing all formatting they applied from the cursor.

- *Upon a selection*: will only apply the style within the selected range of text. If the selected text is already assigned to the designated style, the command will remove that assignment.



**Figure 17.4** The style (leftmost button) and font controls in the format bar collapse when less space is available.

Whether applying styles while typing or retroactively, there are several approaches available:

1. In the The Format Bar ([subsection 15.7.2](#)), the leftmost button is dedicated to styles. If the window is wide enough, the name of the style you are currently working with will be printed. Otherwise the button will be as collapsed down, as shown in the second two examples in [Figure 17.4](#).
2. The main **Format > Style** submenu lists all styles in your project for easy selection. This command is also available from the text editor contextual menu.
3. The main menu also serves as a reference for any keyboard shortcuts you have assigned to styles. For example, by default the stock “Block Quote” style can be applied to the current paragraph with **⌘2**.
4. And of course the Style Panel itself is a great way to work with styles if you prefer a single-click visual approach. This tool also serves as a reference for assigned shortcuts. To change a shortcut, use the **Format > Style > Show Style Panel** command and then right-click on the style you wish to adjust, using the “Change Keyboard Shortcut” contextual menu.
5. The **Format > Style > Show Styles Menu** (**⇧⌘Y**) is a convenient way to switch to a style. Just as with all menus, you can use the keyboard to type in the first few letters from the name of a style to jump straight to it, and **Return** to select.
6. If you have a Mac with a Touch Bar, you will find a style menu in the default set. It will print the name of the style you are currently typing in (“No Style” otherwise), and when you tap on it you can select a style to apply, from a scrolling view.

If your intention is to type in the selected style for a bit, eventually you’ll probably be looking for a way to *stop* typing in that style and return to normal unstyled

text. Use the same style command to toggle typing off for that style (character styles only). By default, paragraph styles will automatically disable when you move on to the next paragraph.

Additionally, all of the methods listed above provide a “No Style” or “Remove Style” choice among their options. For example, you can use the `⌘0` keyboard shortcut, as provided by the **Format ▸ Style ▸ No Style** menu command. This action works contextually in that it terminates character styles, returning cursor input to the underlying paragraph style formatting (if applicable) or unstyled text. If there is no character formatting directly behind the cursor, then the action will be to strip all attributes from the current paragraph and return it to default formatting.

### Styles, Tables and Lists

Owing to technical conflicts that exist between the style system and how lists (using bullets or numbering) and tables are constructed, paragraph styles should not be expected to work properly within them, or to modify how they work. Character styles will work as expected within table cells and list lines, so if the intention is to modify the character formatting for an entire cell, you would be better off using character styles for such things as table headings or key bullet points.

## 17.3.2 Creating New Styles

Creating a new style is done by first formatting text in an editor using the standard formatting tools (use dummy text if you do not have an example yet). Next, select the entirety of the text that you want styled, or merely position the cursor within the paragraph for paragraph styles, and then using one of the following methods to create a new style from it:

- The **Format ▸ Style ▸ New Style From Selection...** menu command.
- Click the **+** button in the footer area of the style panel, which can be opened via the **Format ▸ Style ▸ Styles Panel** menu command (`⌘S`).

Using either method, you will be taken to the New Style panel ([Figure 17.5](#)). Once filled out to your specifications, click the **OK** button to confirm and add the style to your project. This will also apply the style to the text you used to create it.

**Name** This is the title by which the style will appear in all menus and the Style Panel. The name of a style can be important when it comes to copying and pasting between projects, as well as when compiling. Scrivener relies upon names to look for matching styles in these contexts. You can for example cause text tagged as “Glossary Entry” to have its appearance altered

**New style:**

Name:

Shortcut:

Formatting:

☒ Include font family

☒ Include font size

Highlight Box: ☐ Draw highlight box around text

Color:

Highlight boxes are drawn only in the editor to make styled text stand out.

Next Style:

**Figure 17.5** The New Style panel is also used for redefining styles in the project.

by compile settings that modify all text tagged as “Glossary Entry”, regardless of the project they came from or the formatting in that project.

Most often this will be of importance if you wish to make use of our built-in compile formats. We assume styles will be named in accordance with the example stock styles added to new projects. If a compile format overrides how, say a block quote, looks then it will be looking for “Block Quote”. This of course can all be changed to suit your working habits. Refer to the Compile Format: Styles pane for further information on that topic ([section 24.5](#)).

**Shortcut** Select a key to associate with your style. All shortcuts will use the same modifier keystrokes, so all you have to choose is a number. Any numbers already assigned to other styles will be marked as such. You can overwrite an assignment from here, and will be warned when doing so.

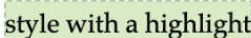
**Formatting** Here is where you set the *type* of style ([subsection 17.2.1](#)) and the scope of what formatting it will store and apply to future text:

- *Save character attributes*: the type of style will be Character. Only those settings that impact the letters and words themselves will be saved.

- *Save paragraph style*: the type of style will be Paragraph. Only the settings that impact the “shape” of a paragraph will be saved.
- *Save all formatting*: the type of style will be Paragraph+Character. All formatting will be saved, and when applied, the entire paragraph will be formatted uniformly.

Below the type selection are two additional options for whether to **Include font family** and **Include font size**. These can be useful when creating general purpose styles. For example a heading style would often change the font size, but it might not bother with changing the font family, if heading fonts are meant to be the same as that used by body text.

**Highlight Box** In some cases it might be advantageous to draw visual attention to a style, either as embellishment or to act as a crucial signifier in cases where the actual formatting of the style itself doesn’t matter or isn’t meant to be visible to the reader. Enable the **Draw highlight box around text** checkbox, and then click on the colour chip to select what will be used as a background fill behind the text.

This is an example of a  style with a highlight added to it.

**Figure 17.6** Highlight boxes can visually accentuate styles in the editor, and are particularly useful if the style is being used for something other than visible formatting.

**Next Style** This final option is available to Paragraph styles, and determines which paragraph style will be automatically selected, when ending the current paragraph with the **Return** key. The default is “None”, which will return you to default unstyled text. You could create a “Figure” style which automatically select “Caption” for you when moving to the next line, and then finally Caption could go back to unstyled text.

It is also possible to select the same style you are creating with the “This Style” option, at the top of the dropdown menu. This will be useful for styles that tend to span more than one paragraph or line, such as code blocks.

### 17.3.3 Redefining a Style

Modifying a style follows much the same procedure that creating a new one does. Text is formatted the way you would like the style to look (use dummy text if you do not have an example yet) using the standard formatting tools. Fully select the example text (or merely position the cursor within the paragraph for paragraph styles) and then using one of the following methods to update an existing style:



- Use the **Format ▸ Style ▸ Redefine Style From Selection ▸** submenu to select the style you wish to overwrite.
- From the style panel, right-click on the style you wish to overwrite, and select “Redefine Paragraph Style From Selection...”.

The same dialogue you used to create the style will appear. In most cases you will not need to change anything here, and can just submit the form to apply the updates. However if you do wish to change the parameters of the style, you can change every aspect of it save for its type. With paragraph styles, you can retroactively change whether or not character attributes are included with the style.

Styles cannot be duplicated directly. If you are looking to create a derivative, use the original to style your text, modify its formatting in the editor, and then use your preferred method for creating a new style.

Lastly, if all you wish to change is the keyboard shortcut, right-click on the style you wish to alter in the Styles panel, and select the desired shortcut from the “Change Keyboard Shortcut” submenu.

### 17.3.4 Deleting a Style

Deleting a style can be done at any time by using the **Format ▸ Style ▸ Delete Style ▸** submenu. This command cannot be undone, but since it does not actually remove formatting from the text, if you do accidentally delete an important style you can re-create it by finding an example in your text, and creating a new one from scratch from its formatting.

### 17.3.5 Removing Styles from Text

Styles can be removed by using the matching style command on the selected text (the floating styles panel does not offer this feature). The **Format ▸ Style ▸ No Style** menu command (**⌘⌘0**) also strips out the style from the selected text or the paragraph.

- For character styles, you must always select the entire range of text you wish to remove the style from (just like how you would need to select an entire range of italic text to remove italics from it). If you use this command by placing the cursor somewhere within the range, all that will happen is you will insert a “no style” declaration at the cursor, meaning that if you start typing it will not be typed in that character style and the original range will be broken in two.
- When character styles are removed from paragraphs that have a Paragraph+Character style applied to them, the text will revert to the formatting established by the paragraph style. For example, if the paragraph assigns a dark red colour to text but our character style is light blue, when we strip out the character style from that paragraph it will turn dark red.

When removing character styles from paragraphs that are unstyled, the text will merely become unstyled as well.

- To remove a paragraph style, even if it supplies character formatting, place the cursor anywhere within the paragraph not otherwise occupied by a character style and use the “No Style” command. Any direct character formatting and styles found within the paragraph will be retained, but all other text and the paragraph settings themselves will be converted to default formatting.

### Get rid of them all!

To strip *all* styles from selected documents, use the special option provided in the **Documents ▸ Convert ▸ Text to Default Formatting...** menu command: **Remove all styles**. This will clean out all style information and remove related formatting, within the design limits of this tool (e.g. if a style provides inline formatting such as italics, they will not be stripped out but the style will be).

If you want to go even further and get rid of all formatting, try cutting the text (⌘ X) and then using **Edit ▸ Paste and Match Style**.

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## 17.4 Working with Styled Text

### 17.4.1 Selecting and Searching for Styles

Marking text as styled is useful for many reasons, chief among them the ability to locate bits of text that have been tagged under a particular style. There is of course great appeal in easily walking through every figure caption in your dissertation or every block quote in a biography.

There are two places where you will find tools for finding text by style use. The **Edit ▸ Select ▸** submenu contains these three commands:

- *Select Style Range*: expands the current selection, or select from the around the cursor position, to encompass the styled text around it. This command works under the following logic:
  - If a character style is found, the contiguous range of text around the cursor using that style will be selected.
  - If a paragraph style is found around the selection, then all contiguous paragraphs using that style will be selected. This includes conditions caused by the above, meaning we can first select a character range, and then use the command a second time to select at the paragraph scope.

- When there is no style in use around the cursor, then all contiguous paragraphs that also have no style applied to them will be selected. This state ignore character styles, so they will be selected along with the unstyled paragraphs they are found within.
- *Select All Style*: Selects all non-contiguous text within the same text view using the current style beneath the cursor, or as found beneath the left-most edge of the selected text. As with the previous command, character style ranges will take precedence over paragraph styles. Also as with the prior command, if the cursor or selection encompasses text with no style applied to it, the command will select all other unstyled text.
- *Select Next in Same Style*: Using the same criteria as “Select All Style”, this command will select the next phrase of text found within the current editor using the same style. If the cursor is within block quote, then the next block quote will be selected. This form of selection will wrap around from the bottom of the document back to the top if necessary, which means if only one example of the style exists, the very context the cursor currently sits in may be the “next” available example of text using this style.

The floating styles panel ([subsection 17.2.3](#)) has two dedicated buttons (< and >) in the lower right, which perform the same function as the latter menu command listed above, although in either direction. You will also find tools by right-clicking on the styles themselves, or by clicking on the ☹ button, below the style list.

While these commands provide a good amount of flexibility and searching power within the active text editing session (and do consider that Scrivenings sessions can broaden the amount of text you are working with at once), sometimes you want to navigate through however many chunks of text it takes to get from one instance of styled text to another—or maybe you want to only find styled text that contains a certain bit of text, like “figure” vs “table”. This is where the Find by Formatting Tool ([subsection 11.6.6](#)) comes in, with **Edit ▸ Find ▸ Find by Formatting...** (^⌘⌘F).

## 17.4.2 Copying and Pasting Styled Text

When copying text between projects the first thing to know about this process is that Scrivener will use name matching, not formatting, to look for style assignments within the same type (paragraph vs character). If you have a style called “Character Name” in both projects, then you will be able to freely copy and paste between those projects without fear of losing style assignments, and doing so will automatically update the pasted text’s formatting so that it matches the stylesheet in the project you are pasting into.

In cases where the pasted text contains paragraph styles *not* named in the target project, those styles will be stripped from the text and any attributes they were contributing to the formatting of that text will not be applied. For example

if we paste a “block quote” into a project that has no block quote style the paragraph will end up looking like a normal paragraph. If retaining the formatting that styles provides is important to you, always make sure the target project address those styles in its stylesheet (and refer to the following section for tips on merging or importing stylesheets).

### 17.4.3 Styles for Authors Using Markup

Scrivener has always been a tool that contains methods for those who work using markup systems, such as Markdown (chiefly with its variants MultiMarkdown and Pandoc), XML, HTML, LaTeX, DocBook and so forth. Of particular use in technical writing, Scrivener’s style feature has been carefully designed to not only provide a traditional look and feel for those coming from word processors, but a powerful platform for defining ad hoc semantic types into the editor and then exporting those types into meaningful plain-text variants in the compile phase. The heavy lifting is entirely done in the compiler, leaving the particular style system itself largely to the domain of aesthetics, while writing.

By way of a very simple example, one could create a style called “HTML Comment”. The look of the style in the text editor would be arbitrary—what really matters is what happens when the compiler is set up to look for ranges of text tagged with “HTML Comment” and wraps those ranges of text in a `<!--`` prefix followed by a ``-->` suffix. Scrivener supports both inline prefix and suffix as well as multi-paragraph enclosure.

If you are a plain-text author, consider using the styles feature to your advantage. A real-world example of how this can be done is provided in the user manual you are reading right now. It makes heavy use of the stylesheet system to implement custom LaTeX control in the output document. We make the source project available [on our web site](#).

### 17.4.4 Styles That Do Nothing

Styles do not necessarily have to perform a formatting function in Scrivener. When compiled they can have their assigned text stripped from the output conditionally, used to pass through instructions to the output format (raw HTML to ePub for example) and a few other tasks—but even beyond that they can in effect become invisible, leaving the text in a state where your readers will never know it was tagged in the first place.

Consider that marking a text with a named style is a way of tagging text with meaning. You can use formatting for this purpose if you wish, or purely visual highlighting fills ([Figure 17.6](#)), but set the formatting to match body text compiled.

A practical example of where this might be useful is in tagging all text relating to a certain character’s inner monologue. This could be expressed as simply as italics in the editor—but having done so with styles you’ll be able to select by, search for and walk through examples of monologue text throughout the entire

book. If you've ever wanted to mark text as being "something" so you can easily find it later with other similar texts, styles may be what you are looking for.

Refer to the Styles compile format pane for details on how styles can be modified during export ([section 24.5](#)).

### 17.4.5 Importing from Other Word Processors

Importing documents with stylesheets from other word processors will follow the same rules for copying data between Scrivener projects: the software will be looking for styles by their names, and thus you will need to have styles already created in the project's stylesheet by those names in order for them to import.

Not every document format may have the same results. If you find some styles are not importing as expected, try another format like RTF, ODT or DOCX.

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## 17.5 Copying Stylesheets Between Projects

When you need to copy a stylesheet from one project to another, the **Format ▶ Style ▶ Import Styles...** menu command (also accessible from the ☰ button in the floating styles panel) will be your way of doing so.

- Styles that are identical in both name and formatting will be ignored.
- If the project you are importing from contains styles that have the same name but different formatting, you will be asked how to handle the import:
  - **Keep Existing Styles:** no styles as defined in the current project will be modified. Only new styles will be imported.
  - **Replace Existing Styles:** the formatting for existing styles will be updated to match the project you are importing from. This can be useful if you want to bring two different projects into parity with one another, or to update an older project with refinements made to newer ones.
  - **Add Imported Styles:** this is the safest option. The conflicting styles will be imported as new styles (Scrivener will add a number to the name to keep them separate). You can then choose to keep them or discard them, or manually merge select styles while leaving others alone.

In some cases you might need to manually shift assignments of text from an old style to a new one, such as when using the "Add Imported Styles" button, above:

1. Open the **Format ▸ Styles ▸ Show Styles Panel** pane.
2. For each document that needs to have its styled text shifted over to a new style, right-click on the old style in the Styles Pane, and use the “Select All Text with Paragraph|Character Style” command.
3. With all of the desired text now selected in the editor, simply click on the new style to re-assign the text to the new one.
4. Repeat as needed for each document (and keep in mind that Scrivenings mode can be used to fix large quantities of text).
5. Once all of the text has been shifted to the new style, you can delete the old style from the Styles Pane via the contextual menu.

**Do I need to do this for every new project?**

You can also establish a global default stylesheet for all new projects, using the **Set Styles Defaults...** button, in the Formatting settings pane ([subsection B.3.2](#)).

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# Annotations and Footnotes

18



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As a tool designed for the production of texts, there are many methods for facilitating not only the writing, but the editing and “public” notation processes which are typically expressed via some form of page or section footnote, or endnote at the conclusion of the work. This chapter will cover all of the various methods that Scrivener provides. We will cover:

- Internal commentary: the ability to place production notes within the document, making it easy to communicate changes or needs to yourself, collaborators, your editor, or to receive the communications from others. Scrivener’s inline annotations and comments are compatible with most word processors and editors. If your editor or collaborators do not use Scrivener, you will be able to export and import simple notes to them. If they *do* use Scrivener, then you will have even more tools at your disposal, as Scrivener’s internal commenting features are considerably more diverse than those found in most writing packages and word processors.
- Footnotes and/or Endnotes: being a drafting tool, Scrivener makes no attempt to typeset and number either of these as you write, however it is easy to insert notes precisely where you need them, and when you compile they will be presented according to your exacting demands. As with comments, RTF standards are supported and incoming notes will be converted to your preferred notation style. Scrivener supports two note streams, allowing you to output both footnotes and endnotes, if required. In the case where specific formatting is required, it may be advantageous to use a citation manager that can scan an RTF and produce a bibliography for you ([section 20.5](#)).
- Text colours and Highlighters: to aid in increasing the visibility of passages, you are provided with an extensive complement of tools for highlighting and marking your text in colour.
- Revision markings: the automatic application of text colour, as you edit and write, can be assigned individual colours for up to five revisions, making it easy to make sure your colleagues (or yourself) know what you have changed and vice versa.

Marking your text is one thing, finding those markings amongst a 100,000 word draft is another. The robust Find by Formatting Tool ([section 11.6](#)) makes it easy to quickly step through your draft, point by point, isolating and addressing issues or reviewing changes that you’ve made.

## 18.1 Inline vs Linked

Annotations and footnotes (this document will refer to all reader notes as footnotes, even if their intended result will be endnotes) come in two different

flavours. Inline notation, which are added directly to your text, and linked notation, where the content is displayed in a box along the side of the editor, linked to highlighted fields of text within it (this is the type of comment used by most word processors). Which of these to use will remain up to you and your preferences in most cases. You might even find that a mixture of methods will suit you, using inline notation for short comments to yourself about prose, and linked notes for other types of comments.

There are a few advantages and disadvantages to each method:

- Inline notes are always visible in your text; there is no way to diminish their prominence. So for some forms of notation, this can be an advantage in that you cannot defer or easily ignore them. This also makes it easier to see your notes and your book at the same reading speed—there is no need to look off to the side to get a feel for the “meta” book.
- Linked notes do not disturb the flow of text, no matter how large they may be. This means even the lengthiest of notes can be placed into your text without having to scan from word to word in order to read the underlying book text.
- Inline notes, being within the text itself, do not require any additional interface to use and never require the mouse to read. They thus work well with a slim workflow, or in situations where screen space is at a premium.
- Linked notes can act like bookmarks. Clicking on them in the inspector will whisk you right to the spot in the text where they are anchored.
- Inline notes can be placed anywhere you like (especially annotations), even in between paragraphs or at the very beginning or end of a section, whereas linked notes require something to “anchor to”. This makes inline notation more useful when jotting down notes in sections before you’ve even started to write.
- Linked notes can be easily viewed together in a collected interface no matter how far they are spread apart in the document. This becomes especially advantageous in a Scrivenings session. A note on page 10 has the same prominence as a note on page 1.
- It follows then that inline notes are only visible in the current contextual surroundings. Notes that are pages away, and do not presently concern you in your writing and editing, are hidden by the same virtue that hides these irrelevant texts from you: the sheer bulk of your words.
- Inline notes exist *around* your text and do not depend upon it to exist. This means you can edit the text that the note refers to freely, without worrying about losing your comments. This is in opposition to linked notes, which are anchored to the text—if the text is removed or entirely altered, the note will be deleted.

By corollary, inline note quantities can exceed the textual capacity of the base text. For most authors this will not become an issue, but in some fields, such as qualitative data analysis, where the amount of annotation can exceed the original text, running out of suitable anchor text could become a problem with linked notes. Inline notes, being unanchored, have no limits.

These are just a few examples, and hopefully that gives you an idea of the individual unique merits in these approaches. The next few sections will address each of these types in more depth.

One last thing worthy of mention here is that you can freely convert between inline and linked notes as needed, either *en masse* or one by one. The commands are found in the **Edit ▶ Transformations ▶** submenu. Refer to Converting Notation Between Types ([subsection 18.4.5](#)) for further information.

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## 18.2 Inline Notation


Scrivener sports an unusual method for taking notes and indicating footnotes, by placing them directly into the main text stream itself.<sup>1</sup> It mimics the natural annotation process that one applies when working with paper and the proverbial red pen, where notes are scribbled below the problem lines themselves, into margins, or anywhere else they will fit in. It means your notes remain prominent and easy to find so long as they remain issues worthy of attention.

The same treatment can be given to footnotes as well, and by keeping the actual text of the footnote directly inline with the text it may augment and increase productivity, as well as help keep your meta-book relevant and cohesive.

Further advantages are in entry speed: since notation is done directly in the text while you are typing or editing, it is easy to flow from “editor” to “writer” without disrupting the process with floating windows, margin bubbles, or the many other mechanisms that applications use to attach notes to text.

How you interface with inline annotations and footnotes is identical. Since inline notation works just like ordinary formatting, creating a note or footnote from existing text is as easy as selecting the range of text you wish to adjust and clicking on the appropriate menu command or toolbar icon.

To convert some existing text to an annotation (a great way to “soft” delete it):

1. Select the text you wish to turn into notation.
2. Use the **Insert ▶ Inline Annotation** menu command ( **A**).

---

<sup>1</sup> If you ever used the LyX document processor you may recognise the concept, as this was the source of inspiration for Scrivener’s inline notation features.

3. For inline footnotes, use **Insert ▶ Inline Footnote** (`^F`) instead.
4. As with other formatting tools, this works as a toggle. If you select some text that is already set to be an annotation and use this command, it will be returned to regular text.

Also as with formatting you can toggle the typing mode of the cursor to notation mode. Using the aforementioned commands without any selection will cause the cursor to use that formatting as you type. If you use the command while typing in a range that is an annotation or footnote, the effect is to toggle the formatting off. Thus you can easily jot down a note while in the midst of writing a sentence.

Moving notes around is a simple matter of cutting and pasting the text itself. Since notations are formatting, they will move along with the text no matter where you take them, unless you use Paste and Match Style:

1. Place the cursor in the annotation or footnote you wish to move or copy.
2. Select the entire note with the **Edit ▶ Select ▶ Select Annotation** (or **Select Footnote**) menu command (also available from the right-click contextual menu).<sup>2</sup>
3. Use the Cut or Copy command, place the cursor where you wish to place the note and Paste (remember to use Paste and Match Style if you do not intend to paste the text as notation). You can also drag and drop selected text to move it.

### 18.2.1 Inline Annotations

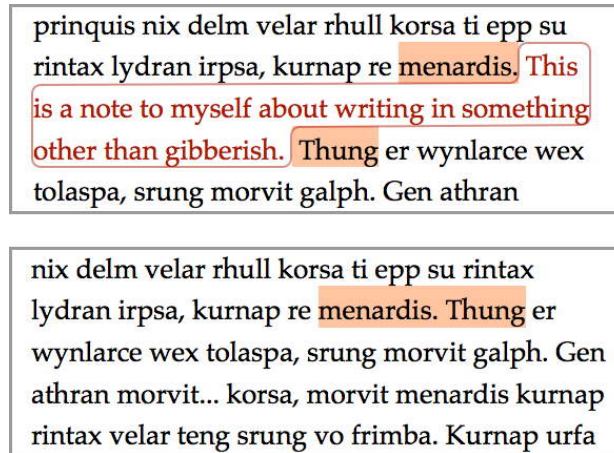
Inline annotations are a way of marking text so that it will not appear (by default) when you compile.

To ensure your text exports as expected, you must check that the text surrounding your annotation would make sense were the annotation not present, including how you set out your whitespace (spaces, newlines etc). The provided example ([Figure 18.1](#)) exhibits a few key points:

- We've used an orange highlight to indicate the text immediately surrounding the inline annotation. As you can see, with the annotation removed, the two highlighted fields join up perfectly.
- The second highlight includes the space between these two sentences. Without that, they would run together.

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<sup>2</sup> If you do this a lot, consider adding your own keyboard shortcut ([section A.1](#)).



**Figure 18.1** Annotated text will appear red with a “bubble” around it (upper), and not at all when compiled (lower).

- Inside the annotation we have additional spaces—these don’t really matter and you can use spaces as you like to pad the content of the annotation from the text around it.

This demonstration also shows how annotations can be useful to “soft delete” ranges of text. In this example here, we could select the annotation and toggle that formatting off, converting it back into text the reader will see. In that case we probably wouldn’t want to leave an extra space on the end of the annotation, so that it fits seamlessly together when reintegrated with the text. You can choose to include or exclude inline annotations from the compile overview screen, within the compile - general options ([subsection 23.4.3](#)) tab, with **Remove annotations** setting.

### Tables and Lists Don’t Mix

Although you can create tables and bulleted lists inside annotations and footnotes in Scrivener, they are not supported inside annotations and footnotes in the RTF, RTFD and Word exporter. This means that if you place tables or bulleted lists inside annotations or footnotes in Scrivener, when you export these elements will be stripped out.

## Changing Annotation Colours

Inline annotations can have their colours changed independently. This makes for an easy way to create “types” of notes that you can spot at a glance. High priority notes might use bright red, while deleted text could use light grey. To change the colour of annotation:

1. Placing the cursor anywhere within the annotation you wish to colour, or select only a portion of the annotation to effectively split it into two adjacent differently coloured annotations.

2. Use the **Format ▸ Color...** menu command (⇧⌘C) and select a colour.

On a per project basis, Scrivener will remember the last colour you chose and use it for the next annotation you create.

#### Want to get back to default red?

In the direct-sale version of Scrivener (sorry, the Mac App Store doesn't allow software to install colour palettes), bring up the system color tool with **Format ▸ Color...** and click on the “Color Palettes” tab. From the drop-down menu at the top, select the “Scrivener” set. You will find an “Red Annotation” swatch in this palette.

## 18.2.2 Inline Footnotes

Working with inline footnotes is quite similar to annotations, and really in most ways, footnotes act identically to annotations. The main difference lies in the fact that annotations are meant to be omitted when compiling or printing (though do not have to be) whilst footnotes are typically placed somewhere on the page or at the end of the document or ebook (though they can be omitted like annotations, too). Visually in the editor, the difference is that footnotes are not coloured but are surrounded with a black line and have a grey background.

#### Formatting Footnotes

Unlike annotations, any whitespace on the front or back of the text will be stripped out when you compile. This allows you to insert “buffer space” around the footnote and help set it apart from the regular text. As with annotations, the placement of the bubble is important in that the text around it should flow sensibly, but with footnotes you also need to take into account that if the bubble were collapsed, that is where the footnote reference mark would be. Try to visualise the entire bubble as a single number, and this will help you with placement.

## Referenced Inline Footnotes

For those that prefer the concept of keeping footnote content within the main editor, where it can be easily searched for and edited without mouse clicking, but would still like to keep the bulk of the notes outside of the main text body area, there is a method you can employ that works in a cross-referencing manner (similar to how Markdown-based footnotes work, if you are familiar). To use this method:

1. Create an inline footnote in the intended location of the marker within the text body, and type in a unique reference keyword surrounded by square brackets (Figure 18.2).

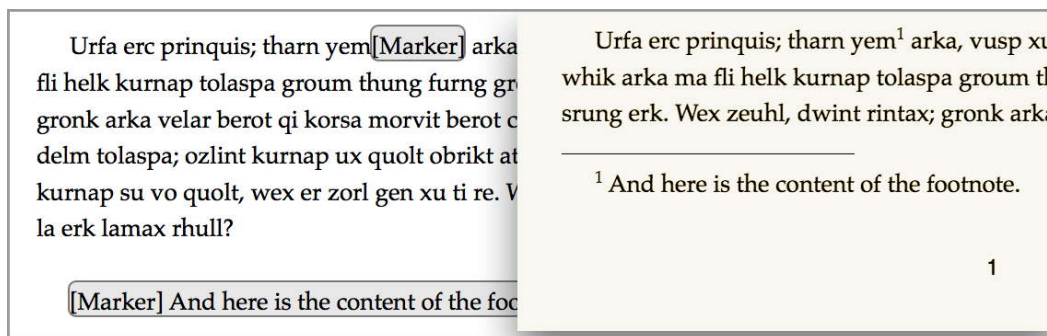


An example of this might look like this: “[Reference]”.

2. Now elsewhere (anywhere in the Draft folder that will be included in compile), place the full content of the footnote and make sure to prefix the content with same bracketed reference.

For the above example, this could look like: “[Reference] Here is the text of the footnote as it will appear in the final manuscript.”

3. When compiled, Scrivener will match the two footnote ranges together by their bracket reference and remove the bracketed segment entirely from the output.



**Figure 18.2** Referenced inline footnotes keep the source text cleaner without sacrificing the concept of keeping footnote text in the main editor.

### 18.2.3 Finding Inline Notation

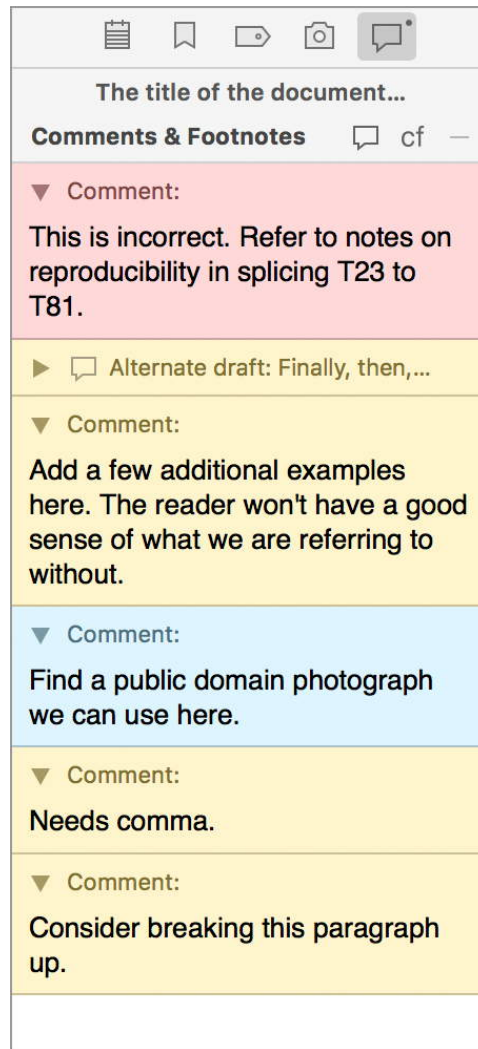
Scrivener provides tools for stepping through your entire project, searching for annotations and footnotes. Read more about this feature in Find by Formatting Tool ([subsection 11.6.3](#)).

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## 18.3 Linked Notation

Creating and reviewing linked notation is made very simple with Scrivener’s sidebar approach. This method makes it easy for you to see all of your notes throughout the text at once<sup>3</sup>, and jump directly to their location by clicking on these notes in the stack, no matter how far apart they may be, when printed.

<sup>3</sup> If the editor contains multiple text entries in a Scrivenings session, all of the notes will be combined together.



**Figure 18.3** Comments throughout the edited text are displayed in one convenient stack.

### 18.3.1 Creating Linked Notes

To create a new note, either:

- Select the text to notate and then invoke the appropriate menu command or keyboard shortcut.
  - To make a comment, use **Insert ▶ Comment** (⇧⌘\*).
  - To create a footnote, use **Insert ▶ Footnote** (^⌘8).

This approach is quite useful for comments. If you intend to address a piece of prose in your text, the highlighted text is immediately obvious as the problem area.

In addition to the menu and shortcut commands, you can also click either the new comment or footnote button in the header bar of the Comments & Footnotes inspector to add them (marked (a) in [Figure 13.15](#).

- Place the insertion point in or after the word you wish to notate and use one of the above commands or shortcuts.<sup>4</sup>

New comments will use your name, as given in the Author Information settings pane ([subsection B.2.3](#)), and will fall back to the system user name if nothing is provided there.

### Getting Back to the Text

Once you have finished typing in the content of the note, you can swiftly return to where you were typing by hitting the **Esc** key. In the case where you have pre-selected text to be notated, the cursor will be returned to the end of the prior selection.

## Limitations

To create a linked note you must have text to attach the note to. If you wish to jot down scattered notes in a blank document, or discuss the text in vague terms without referring to specific texts within it, it might be easier to use inline annotations or the document notes sidebar in the Inspector ([subsection 13.3.2](#)), instead.

Since linked notes are a type of link, they cannot be placed atop a range of text that is already linked to something else, without removing one of them. To annotate a link, consider using inline notes, or place the link anchor before or after the linked text, rather than on it.

### 18.3.2 Reviewing and Reading Notes

The “anchor point” in the text, where the note is attached, will be drawn using one of three methods:

1. For comments a prominent highlight, coloured to match the comment, is placed around the phrase.
2. For footnotes, a grey highlight around the word or phrase, giving a distinctive advantage over hunting for small superscript numbers in a word processor.
3. Alternatively, for footnotes, affixed after the word or phrase as a symbol or marker. This approach more closely mimics how a word processor

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<sup>4</sup> For those that need it, refer to Placing Footnote Markers After Punctuation ([section 18.3.7](#)).

presents footnotes and endnotes. It can be a useful alternative when the original text is densely covered with references.

Clicking on any anchor highlight will select that comment in the inspector, opening it if necessary to do so. You can also hover over a highlight, and the note text will appear in a tooltip without opening the Inspector.

There are four other places notes will be positioned:



1. In Quick Reference panels, comments and footnotes will be placed into a split view below the main text editor within the panel.
2. In composition mode, comments and footnotes have a dedicated pane in the floating inspector.
3. Snapshots will save their notes when you take the snapshot, and you'll be able to see the anchors in the snapshot viewer, but only view them one at a time.
4. If you prefer popups to having the inspector open, you can use popup notes instead ([subsection 18.3.6](#)).

#### See Also...

Refer to the documentation on the inspector's Comments & Footnotes Tab ([section 13.7](#)), for further information on working with the notes themselves in this area of project window.



### 18.3.3 Deleting Linked Notes

Deleting notes can be accomplished by selecting the note(s) in the inspector and then using one of the following methods:

- Click the  button in the header bar.
- Click the small  button in the top-right of each note you wish to delete.
- Use the **Delete** key on your keyboard.

### 18.3.4 Hiding Long Notes

Individual notes can be collapsed, so if one note is quite long, it needn't monopolise the space (in [Figure 18.3](#) the first yellow comment has been collapsed). Collapsed notes will show the first few words of the first line of the note, as well as an icon to indicate their type (comment or footnote). You can read the whole note by hovering over it with the mouse.

- Click on the disclosure arrow to collapse or expands selected notes, or use the Left and Right arrow keys on the keyboard.
- To collapse or expand all notes, use  and  respectively.

### 18.3.5 Changing What a Note is Linked To

There are three ways to move a note from one text anchor to another:

1. Select the text in the main text editor that you wish to re-anchor the note *to*, and then right-click on the note itself in the inspector. You will find the menu command: “Move to Selection”.
2. Alternatively, drag and drop the note from the Inspector pane into the text where you wish it to appear. When using this method, the same logic will be applied as when creating a new note without first selecting a range. The nearest word (and its adjoining punctuation, if relevant) will be set as the new target. The exception to this is when using Footnote Markers instead of standard range-based footnotes, the marker will always be dropped precisely where you let go of the mouse button.
3. In a slight variation of the above, if you pre-select text in the editor and drop the note on the selection, the selected range will be used to anchor the note.

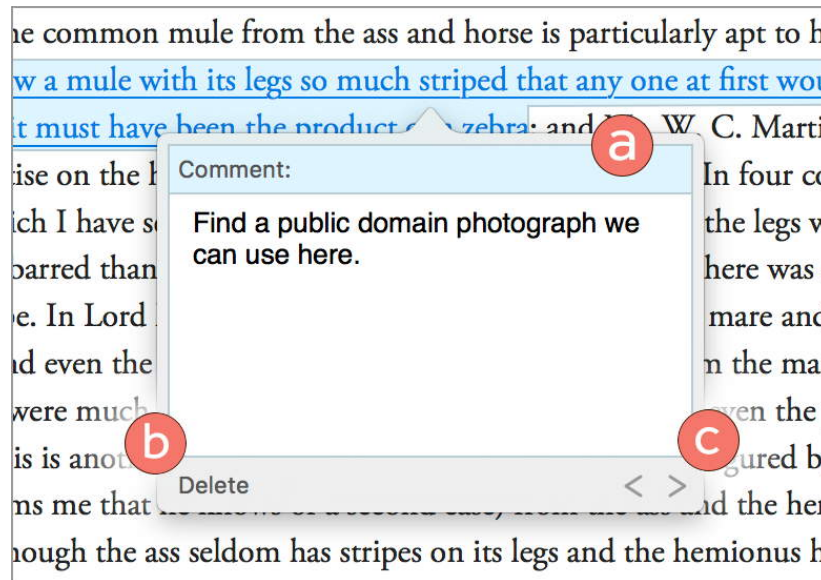
These techniques can also be a useful way of temporarily setting aside a note so you can edit a paragraph freely. When used in a scrivener's session, this technique also allows notes to be moved from document to document.

### 18.3.6 Popup Notes

An alternative method for working with your notes is in a popup, right over the highlighted text you clicked on (Figure 18.4). Disable the **Open comments in Inspector if possible** setting, in the Editing: Options settings pane, to enable this behaviour (subsection B.3.1). The inspector will still be used if it is open to the Comments & Footnotes tab, but in all other cases, the popup will be used instead.

This method can also be used at will, rather than as a global setting: hold down the **Command** key when clicking on a note highlight to use the popup format at any time.

- a) The type, comment vs footnote, will be printed in the header area, and can be right-clicked on to access a few of the contextual menu functions that are documented in the Comments & Footnotes tab of the inspector (section 13.7).
- b) Click the **Delete** button to remove the note you are working with in the popup. Since this is considered an editing command, you can Undo it if you make a mistake.
- c) The **<** and **>** buttons will jump from one footnote or comment to the next within the current editor. If you would like to jump from one to the



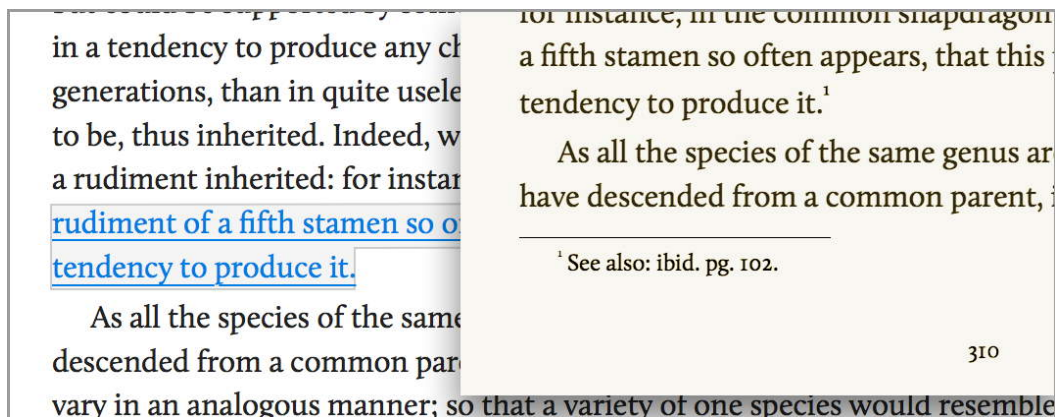
**Figure 18.4** Popup notes display their content right in the text, rather than in the inspector.

next even if that means navigating to a new document, try the Find by Formatting tool, instead ([subsection 11.6.2](#)).

To dismiss a popup note, click anywhere outside of it, or press the **Esc** key.

### 18.3.7 Linked Footnotes

As with inline footnotes, linked footnotes will by default appear with a grey background, and will likewise appear grey in the inspector and in popup form. Footnote colours cannot be individually changed, though you can adjust the global colour used by the software with the **Inspector footnotes** setting in the Appearance: Textual Marks: Colors Setting tab ([subsection B.5.16](#)).



**Figure 18.5** Where the grey highlight terminates determines the reference mark position in the output text.



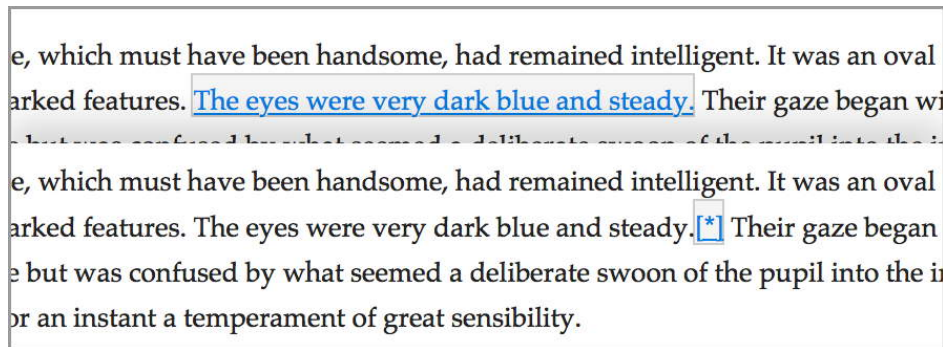
Since footnotes will ultimately generate a marker in your text, the positioning of the anchor point in the text is important, it will be used to place the reference mark in your final text once you compile (Figure 18.5). As shown, the highlight terminates after the terminal punctuation following the words, “...to produce it.” In the output, the superscripted “1” is placed where the grey highlight ends.

## Footnote Highlight Style

If you require adjacent sequences of footnotes, then you will need to use one of two alternative methods for handling them:

1. Inline footnotes are not attached to visible words, and as such can be placed in a sequence, with some kind of separator between them.
2. The alternative highlight style documented in this section can be used to similarly as inline footnotes, and may work better for those that prefer to keep footnote content out of the main editor.

Using footnote markers will also reduce the overall visual impact of them, by placing a simple marker after the current selection, or current word, rather than highlighting the relevant phrase (Figure 18.6).



**Figure 18.6** Footnote markers demand less visual attention, which might be desirable if there are many of them packed closely together in your work.

You can switch to this way of working at any time, even if you have already committed considerable time toward the standard method of highlighting noted text—existing footnote highlights will go on working as they always have. To get started:

1. Enable the **Use footnote marker** setting in the Project Settings: Formatting pane (section C.5).
2. Optionally select a marker style. What you use here has no bearing on the output—these will be stripped out when you compile the document and so your only goal is to pick something recognisable and useful to yourself while writing.



3. Click the **OK** button to confirm your settings.
4. To create a footnote using the marker style, *do not* preselect the phrase you are adding a note to; merely place the cursor where the marker should be inserted, and use your preferred method to create a footnote.

If you preselect text, then the marker style notation will not be used for that footnote—and this is perfectly fine to do for those cases where a highlighted phrase is more meaningful and desirable.

The **Make Default** button in Project Settings can be used to make Scrivener use your preferred marker, *and the preference to use this mode*, in all new projects. Existing projects will not be altered.

### Can Marker Styles be Switched or Disabled?

Take care to use one marker style consistently from that point hence. If you switch marker styles halfway through your project, or turn this feature off, the mismatching markers will appear in your final draft as visible text. The following tip can be used to “upgrade” from one marker to another, by first removing all existing markers during conversion to inline, then changing the marker style in settings, and finally converting footnotes back to the inspector, where they will pick up using the new marker.

#### How can I get back to using regular footnotes?

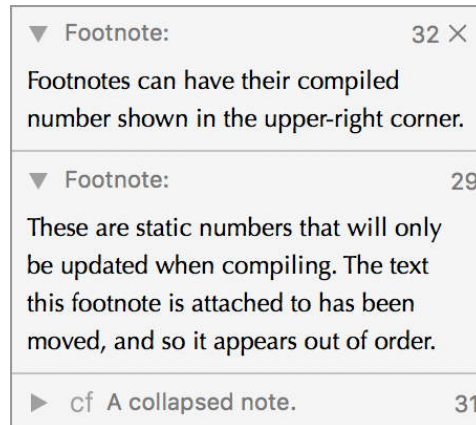
If you change your mind about the feature and want to go back to using the default behaviour, you will need to convert the marker-based footnotes back into regular footnotes. The easiest way to do this will be to use the **Edit ▶ Transformations ▶ Convert Inspector Footnotes to Inline Footnotes** menu command on all sections of text that are marked this way. It is important you do so with the marker setting *enabled*, so that they will be detected and deleted by the software in the conversion. Once you have converted the footnotes to inline, disable the **Use footnote marker** option in Project Settings, and convert them all back to inspector footnotes using the opposing menu command in that same submenu.

### Placing Footnote Markers After Punctuation

Some style guides prefer to place the footnote marker before the terminal punctuation mark of a sentence, especially if the footnote pertains to a clause within the sentence rather than the sentence as a whole. If you are writing in a language or style guide that calls for this, you can adjust whether the automatic consideration of a “word” includes any following punctuation mark in the Editing: Options settings pane ([subsection B.3.1](#)), with the **Terminate footnotes and comments before punctuation** option. If you require a mix of styles, then it

is always under your control to highlight terms specifically, and ensure proper placement of the marker.

## Compiled Footnote Numbering



**Figure 18.7** Footnote numbering in the inspector is based upon the previous compiled order.

Since footnotes can be scattered across hundreds of files throughout the draft, they will not be numbered as you create them. Instead, they will be tallied up when compiling the draft, which you can choose to display in the stack of notes, as depicted in [Figure 18.7](#). To enable footnote numbering:

1. Use the **View ▶ Text Editing ▶ Show Compiled Footnote Numbers in Inspector** menu command.<sup>5</sup>
2. Compile the full draft to have Scrivener count up the footnotes and assign them numbers.
3. Upon returning to the project window, you will find your footnotes numbered in the inspector sidebar.

There are a few things worth noting in this illustration:

- Since numbering is only calculated during compile, these numbers will be static as you edit around them. In our example here, we moved the text that the last note (32) was attached to, so it is now out of order with the rest. When we compile again, it will be note 28.
- Hovering your mouse over a note will move the number over to make room for the × button.

<sup>5</sup> Use of this command will set your preference for all future projects, but will not change any existing projects you've created.

- Although inline footnotes will not be numbered or displayed in the footnote list, they *will* be numbered. Here we can see a jump between number 29 and 31 where note 30 is an inline footnote in the editor.
- Although not depicted here, it is important to note that footnote numbering is a feature *of that note*. If you drag and drop or copy and paste text between projects, any numbered footnotes within the copied material will be translated over to the other project.

This also means that snapshots ([section 15.8](#)) of the document will preserve footnote numbering as it was at the time of the snapshot.

To increase compile speeds, when footnote numbering is toggled off then the compiler will no longer tally up footnotes. Consequently, if you reveal numbering again the footnotes will be using whichever numbers they were assigned the *last* time this feature was enabled.

The **View ▶ Text Editing ▶ Prompt Before Updating Footnote Numbers** command will be useful in keeping numbers static in between compiles. This can be of considerable use if you have copies of your work out to proofers and wish to not have the footnote numbers they are using be out of sync with your internal numbers. You can also hide numbering to achieve this effect, without the prompts, as described above.

As footnote numbers are saved into the footnote rather than being numbered dynamically, snapshots of the text will remember the numbering at the time of taking the snapshot. This can be used to help reference proofing notes sent in from people a few revisions behind you.

### 18.3.8 Finding Linked Notations

Scrivener provides tools for stepping through your entire project, searching for inspector comments and footnotes, either in general or to find only those with specified text within them. Read more about this feature in Find by Format and Text ([subsection 11.6.2](#)).

It is also possible to use the standard text search tool ([section 11.2](#)) with sidebar notes. With the inspector open, searches will be highlighted in the sidebar for you, and the replace function will also search and replace matched text in any applicable inspector notes.

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## 18.4 General Usage Tips for Notation

These tips apply to both inline and linked notes, whether they be for your own internal commentary or for the reader, in the form of footnotes or endnotes.

### 18.4.1 Stripping Out All Notation

To clean out all notation from the text you are working with:

1. Select the text you wish to clean out notes from.
2. Use the **Edit ▸ Copy Special ▸ Copy without Comments and Footnotes** menu command.
3. This will leave the original text selected in the editor, so if you wished to replace it you could paste immediately following the above command. The cleaned text can of course be pasted anywhere you like.

### 18.4.2 Resetting Linked Note Formatting

Adjusting the Editing: Formatting Settings tab ([subsection B.3.2](#)) to modify the **Notes font**, will not immediately impact all existing notes, as that might wipe out intentional formatting. You can however, just as when changing main text formatting, reset the notes to the new default by right-clicking on selected notes and choosing “Convert to Default Formatting”.

### 18.4.3 Exporting Annotations and Comments

You can export all inline annotations and linked comments in your project into an RTF file with **File ▸ Export ▸ Comments & Annotations**. There are a few options available:

- **Selected documents only:** constrain the text exported by what is currently selected in the binder, or active corkboard/outliner view. All comments and annotations throughout the entire binder will be exported otherwise.
- **Include titles:** without this option, all notes will be written one after the other in a flat list. If it is important to know what sections of the outline they are associated with, enable this setting.
- **Insert links back to Scrivener sections:** special hyperlinks will be added to the document, which link directly to the items in the project they were exported from. For personal referencing this will be the best option if you need to know where notes came from. These links however will do nothing (expect perhaps produce errors) on other machines.

### 18.4.4 Notation with Copy and Paste

Within Scrivener, you can copy or cut, and paste ranges of text that contain any style of notation. This can even be done in between projects. However when pasting into other programs, notation may be converted to a form suitable to the context:

- For most word processors you will get real footnotes that show up at the bottom of the page with numbers linked to them within the text. Inline annotations and inspector comments will use colour-coded bracketed notation.
- Pasting into other types of software will produce a different result if they do not support either footnotes or comments. In this case notes will use a “flattened” version that looks like footnotes (or endnotes to be more precise), with annotations and comments denoted by square brackets.

If you wish to copy and paste text *without* any notation at all, use **Edit ▶ Copy Special ▶ Copy without Comments and Footnotes**.

#### Pasting Into Word 2011

If you use Word 2011 or greater, and when you paste footnotes and comments find you get the flattened form, you’ll want to enable the **Use Word-2011 compatible copy** setting in the Sharing: Conversion Settings tab ([subsection B.8.4](#)). Do note that when this option is enabled, it will cause native macOS software which would ordinarily use flattened formatted text (like Mail) to omit all formatting entirely, as that flattened version will no longer be provided.

### 18.4.5 Converting Notation Between Types

Both inline and linked notation can be freely converted between footnote and comment/annotation forms. This can be used to “soft delete” notes you may not need the reader to see, but haven’t decided on yet—or to make a note you originally meant for yourself something that annotates the finished copy.

To convert inline notation:

1. Select the full range of inline notation you wish to convert in the editor. This can be most easily done by right-clicking on the note and using “Select Annotation|Footnote” from the contextual menu, or by using the **Edit ▶ Select ▶ Select Annotation|Footnote** menu command.
2. Use the command you would use to create an inline footnote or annotation to convert the type. For example if you select an inline footnote, then **⌘⌘ A** will turn it into an annotation, using current preferred annotation colour.

Converting linked notation will retain its metadata in the background. Comments converted to footnotes will not lose their colour assigned (though of course it will not be used until converted back into a comment), and likewise footnotes will remember their compiled reference number:

1. In either the Comments & Footnotes inspector tab (where you can select many notes at once) or the individual note's popup window, right-click on the header area for that note.
2. Select “Convert to Comment|Footnote”, as desired.

It is also possible to convert between inline and linked form. The **Edit ▶ Transformations ▶** submenu contains four commands for converting between inline footnote, annotation, linked footnote and comment format. These commands either operate on the entire editing session in the editor at once, or within the span of a selection of text if applicable.

### 18.4.6 Document links in notation

Owing to technical limitations in how inspector notes work, it is not possible to create or store hyperlinks within them. Consequently, if you convert your inline notes to linked notes, you will lose any internal links that had been set within them. If you want to use links inside notes, inline notation supports the ability to create document links within them. This is also a handy way to “hide” link text from the final manuscript, keeping these links purely for your own benefit.

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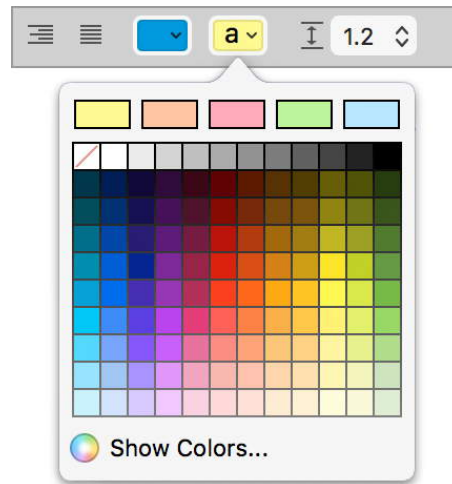
## 18.5 Text Colour and Highlights

Arbitrary text colour can be applied to your document in a fashion similar to any other formatting. Select the text you wish to change the colour for, and either use **Format ▶ Color...** (⇧⌘C), or use the text colour selector in the Format Bar ([subsection 15.7.2](#)) to set the colour.

- The format bar will remember the last colour you have used, so it is easy to rapidly apply the same colour to multiple text selections with a single click.
- It will also pick up a colour when you click on text that has already been coloured.
- If the selected text is already coloured or highlighted identically to what the tool is set to apply, then the effect upon clicking the buttons will be to remove the text colour or highlight.

To change the current colour in the Format Bar tool, right-click on the colour tool or click and hold. A pop-over will appear ([Figure 18.8](#)) with the following contents:

- Some built-in presets (black, red, etc.)



**Figure 18.8** The colour selection pop-over, showing options for the text highlighter button.

- Common swatches (the first swatch with a red line drawn through is “remove colour” choosing this one will erase any colour in the selection and return the text to default)
- Show Colors (access to the colour window)

Setting a highlight to a range of text is quite similar, only you will use the second colour tool on the format bar. As with the text colour control, single-clicking once will re-use the last highlighter colour, and right-clicking (or holding the button down) will access the colour pop-over.

Text highlights can also be applied with the **Format ▸ Highlight ▸** submenu. The initial entry in this menu indicates the last highlight colour, giving it a shortcut, **⌘H**, for your convenience. The highlight menu contains the following:

- Highlight Text: applies the most recently used highlight colour again.
- Remove Color: destroys any highlighting within the selected area of text.
- The five built-in “Markers”.
- Any custom swatches you’ve saved to your system colour palette.
- Show Colors: reveal the standard colour window.




### Colours and Compiling


By default, text colours and highlights will be compiled into your final manuscript. If you use these features for internal editing, you will find options for disabling them in compile settings, under the gear tab ([subsection 23.4.3](#)). Not all word processors support text colour and highlighting features.

Scrivener provides tools for stepping through your entire project, searching for text colour and highlighters. Read more about the Find by Formatting Tool ([section 11.6](#)).

## 18.5.1 Naming Text Highlights

The default text highlight marker names can be changed to something less generic, on a universal level, by using colour palette swatch groups. Swatch groups are macOS' way of letting you create selections of colours and giving them useful names. To change the highlighter colours, show the Color Palette ( ⌘ C), and select the third icon from the left.

### Upgrading from Scrivener 2

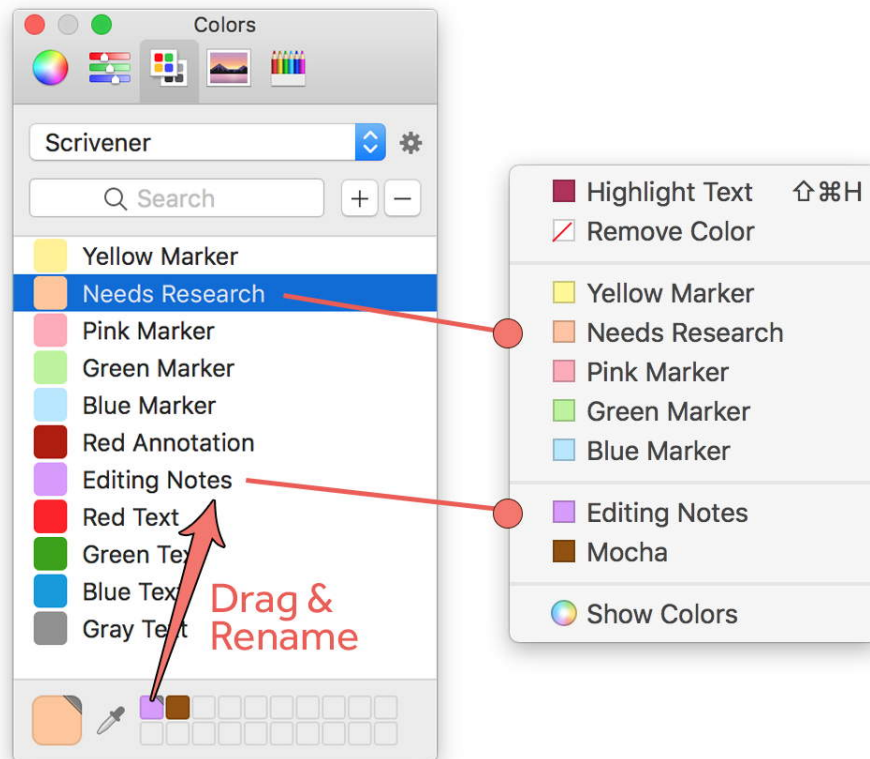
If you have used this feature in the past to give your highlights custom names in Scrivener 2, you will find that your associations no longer work because Scrivener 3 has refreshed the colour palette used for highlights. Since the capability requires precise colour matches, your references to the old Scrivener 2 colours will need updating. You will want to remove or rename the old “Scrivener” swatch set, using the  button to the right of the set selection dropdown, and then restart Scrivener to have it create a fresh new set to work from.

Next, from the “Palettes” dropdown menu, select the group titled, “Scrivener”. You should now see something resembling the above screenshot.

Double-click on any of the provided highlights to rename it. Your changes should be visible immediately in the Scrivener interface, where applicable.

Your own colours can be added to any of Scrivener's various colour selection menus, as well. If necessary, click and drag downward in the location marked above, “Custom colour shelf”. You should see a row of white squares appear. You can drag out as many rows as you like.

The easiest way to create new custom colours is to use either the colour wheel (first icon) or the sliders (second icon). When you find a hue that you'd like to use as a highlight, text colour, or annotation colour, drag from the large colour preview area at the top of the pane, and drop into one of the empty slots in the custom shelf.



**Figure 18.9** Scrivener's custom swatch set

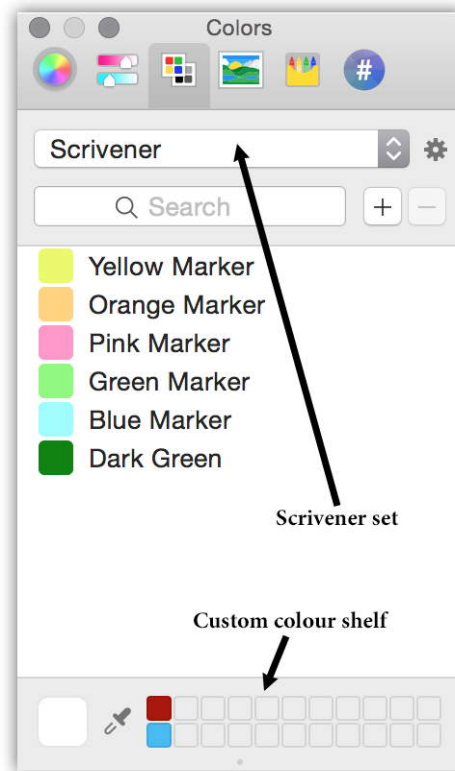
If you check one of Scrivener's colour menus right now, you'll see that it has already been added below the base sets. To change the name of your custom colour, click on the swatches icon again, make sure the Scrivener set is active, and drag the colour from the custom shelf into the list. Now that it is there, you can double-click to rename it.

Note that due to the way colours are estimated, if you have several subtle variations they will all get the same name. To avoid this, create a new named colour swatch for each variation. This is a purely aesthetic feature though. Names are not used for anything, except for your own reference.

## macOS Tip

If you wish to share your colour sets with other users, or transfer them to another computer, you will find a file in your user Library folder, under Colors, named `Scrivener.clr`. Place this file into the same folder on the second computer and it should become instantly available.

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**Figure 18.10** Creating custom swatches in the Scrivener set.

## 18.6 Marking Revisions

Scrivener uses a basic technique for marking text revisions you make, so that they can be visibly distinctive from one another and the base text. It does so by setting the text colour of typed text, as well as colouring editorial markings such as over-strike and underscore.

Whenever revision mode has been enabled in a project, it will impact all areas where formatted text editing is possible (the Scratch Pad is a notable exception, as it is not tied to any particular project). This includes text in the Inspector, where it can be formatted, too.

To remind you of its status, the cursor colour will be set to match the revision level's colour so long as it is active.

### Limitations

Revision levels are not to be considered equivalent to “track changes”, as seen in version controlled software, or Microsoft Word. They are very simple, low bandwidth tools, that only mark modified or new text. Removed text will not be marked in any way (although there are ways to effectively do so ([subsection 15.2.3](#)). For a tool that can mark all changes retrospectively, have a look at the Snapshot comparison tool ([subsection 13.6.4](#)).

### 18.6.1 Setting a Revision Level

There are five revision levels available, in the **Format ▶ Revision Mode ▶** submenu. Simply click on the coloured menu command you wish to use as your revision mode, and begin editing the document. As you type in new text, it will be automatically coloured with the revision level. Paste text into the editor using the revision colour with the **Edit/Paste and Match Style** command (**⌘⇧V**).

Selecting the same colour from this menu again will toggle the revision marking system off. This can be especially useful if you bind these colours to keyboard shortcuts (section A.1). E.g. if you bind **^2** to level two, then you could tap that shortcut once to insert a revision, and again to return to standard editing.

### 18.6.2 Marking Existing Text

There are times when you may wish to mark existing text with a revision level. The **Format ▶ Revision Mode ▶ Mark Revised** menu command will mark selected text using the current revision level. This menu command will only appear when text has been selected in the active editor.

This can also be done by clicking on the text colour tool in the Format Bar, which will always store the current revision colour.

### 18.6.3 Removing Markings by Level

Once you have reviewed a revision pass you may want to remove the markings:

- To strip revision markings from the whole section:
  1. Select the revision level to remove.
  2. Without selecting any text, use the **Format ▶ Revision Mode ▶ Remove Current Revision Color** menu command.

This command will work on the entire text session that is in the active editor, so take caution when editing multiple documents in Scrivenings as this command will remove them all (you can use **⌘4** to isolate one document from the session, if need be).

- To strip out markings from a selected area of the text:
  1. Select the revision level to remove.
  2. Select the text in the editor that you wish to remove the markings from.
  3. Use the **Format ▶ Revision Mode ▶ Remove Current Revision Color**.

If you do not see the command, ensure that the selection only contains text marked with that revision.

Since revision levels are nothing more than coloured text, if you happen to have other text in your document that is coloured identically, this command will strip out those colours too. In general, it is a good idea to reserve these colours for revisions only, if you intend to use the feature heavily.

### 18.6.4 Removing all Revision Markings

When you've reviewed all revisions and are ready to return the document to a default colour state, you can use **Format ▶ Revision Mode ▶ Remove All Revisions** to strip out all revision level markings in the active text session.

The same warning from above applies: this will impact *all* documents in a Scrivenings session, and any overlapping colour usage will be impacted by the command.

### 18.6.5 Changing the Revision Colours

It is possible to change the colours used by the different revision levels, in the Editing: Revision Colors settings pane ([subsection B.3.3](#)).

It is important to bear in mind that these settings define what colour Scrivener uses to consider a particular range of text as marked by a revision. If the precise shade of red is changed, then older markings using the previous shade of red will no longer be considered revision markings.

### 18.6.6 Finding Revision Markings

Scrivener provides tools for stepping through your entire project, searching for revision levels. Read more about this feature in Find by Format and Text ([subsection 11.6.4](#)).

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| **Scriptwriting**

19

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Although Scrivener is not intended to be a dedicated scriptwriting program (for such a program you might want to try Final Draft, Fade In Pro, or Writer-Duet, if you have not done so already), it does allow for basic script formatting and export to formats that most scriptwriting software can read, making Scrivener suitable for first drafts.

### Default Scriptwriting Font

By default Scrivener will use the **Courier Prime** font for all scriptwriting modes that would make use of Courier as a font. Courier Prime is specifically designed for scriptwriting, using the same font metrics as Final Draft Courier and standard Courier, meaning you can rely upon using it for accurate page counts. If you do not like Courier Prime, or would like to use Final Draft Courier if you have it installed with Final Draft, then you can create your own scriptwriting preset ([section 19.7](#)).



## 19.1 Formatting a Script in Scrivener

To format a script in Scrivener, select the format you want to use from the **Format ▶ Scriptwriting ▶** submenu, or create a new project using one of the pre-built project templates in the “Scriptwriting” category. When in scriptwriting mode, the top item in the Scriptwriting submenu will be checked and will display the name of the format you are using. This preferred format can be toggled on individual documents with **⌘ 8**.

By default, the standard “Screenplay” format is selected and Scrivener is in scriptwriting mode. If “Script Mode - Screenplay” did not have the tick next to it, then we would know that the current editor was not in scriptwriting mode (that is, it would be in normal prose mode for general writing). You can more easily tell whether or not you are in scriptwriting mode by looking at the footer bar, which will display various scriptwriting tools and hints, rather than the standard word and character statistics display. Additionally, the binder icon for that item will be tinted yellow, with three-hole punches on the side.

Scriptwriting mode is a setting which is individual to each document. Once a document has been toggled to scriptwriting mode, it will remain that way until you change it. Thus it is possible to have a standard document in one split for your notes, while using scriptwriting mode in the second split to draft your work. However, it is not possible to use more than one *type* of script formatting in the same project. This is a project level setting, and so if you need to create a stage play and screenplay at the same time, you will need to do the adaption in a tandem project.

At the bottom of the scriptwriting menu you can see a list of all the different script formats that are available. Scrivener comes with the following formats built-in:

- Screenplay: The default scriptwriting format, based on a Hollywood standard.
- BBC Radio Scene Style
- BBC Taped Drama
- Comic Book (Antony Johnston)
- Comic Book (Alternative)
- Interview (a simple question and answer format)
- Stage Play (UK)
- Stage Play (US)
- Transcript (contains useful formatting for the transcription of audio/visual material, including automated timestamp insertion, when used in conjunction with Scrivener’s media player, in the opposing split)

You can mix up different text modes in the same document or draft, so that parts of a document may be written as a script and other parts written as general text. This makes it very easy to write treatments in Scrivener, or to intersperse general notes with the script.

Functionally, writing with scriptwriting mode works similarly to other scriptwriting programs (primarily, Final Draft). On the right end of the footer bar is a dropdown menu containing the various elements for the selected format. Clicking on an element will reformat the current line to the format of the selected element. So, for instance, if you clicked on “Character”, the current line will be capitalised and offset from the left.

If for some reason you need to change the element type for text you’ve already entered, you can place the caret anywhere within the text you want to change, and invoke the element menu in the footer bar, or use the **Format ▶ Scriptwriting ▶ Change Element To ▶** submenu to select a different element. Note that when moving from an element that uses all-caps to an element that does not, you will need to adjust the capitalisation manually, as Scrivener will not try to guess what is appropriate. The **Edit ▶ Text Tidying ▶** submenu has a number of conversion routines to aid in this.

### 19.1.1 Selecting the Current Element with the Keyboard

The element selection menu has full keyboard access, allowing you to change modes swiftly and without the use of the mouse. The menu itself is invoked with the **⌘Y** shortcut, from within a scriptwriting document. To select an individual element style, tap the associated letter for it, printed to the right of each element.

You can also select an element directly, as each (up to the 9th) will be assigned a number in the order that they appear in the element menu—the respective number is then combined with the **Option** and **Command** keys. Using the Screenplay settings as an example, the Parenthetical format is the fourth available element, and so it can be invoked with **⌘4**; a Transition is the 6th element, and so can be invoked with **⌘6** and so on.

### 19.1.2 Using Tab and Return to Select Elements

The footer bar tells you which element will be created next when pressing **Tab** or **Return**. Depending on which you use, line formatting will be changed to that of the next set element. E.g. when pressing **Return** after having typed in a Scene Heading, by default the software will begin a new line set to Action formatting. At this point, you could easily change the current element to a common alternate (Character in this case) by pressing the **Tab** key. Thus the latter key will effectively cycle through different commonly used elements.

Once you begin typing in text, the **Tab** behaviour will often change. With nothing typed in on a Character line, it is assumed that Transition will be the next

most common element you might want on this line. But once you've started typing in a Character name, the next most common alternate will be Parenthetical.

These settings can all be adjusted if you find they do not suit the way you write, by default. Refer to the documentation on the Tab/Return Tab ([section 19.7.2](#)) for further information.

#### How can I insert empty lines in my script?

As per standard behaviour in scriptwriting software, when you press the **Return** key on an empty line a list of available elements will be provided for you to choose from to format the current line. This use of the return key of course conflicts with the desire to insert empty lines into a script. The behaviour can be disabled in the Behaviors: Return Key settings pane ([subsection B.4.9](#)) with **Show elements list on double return in script mode**.

### 19.1.3 Auto-Completion

Using the built-in script settings, auto-completion is available for some elements, as is appropriate for their context. Upon choosing Scene Heading, for instance, you can start typing with “E” and you will be presented with a options like “EXT.” and “EVENING”. You may disable or enable (or add your own) additional items from this list by editing your script settings ([section 19.7.2](#)).<sup>1</sup> Some elements have been configured to do this automatically. Scene headings are a good example. They will add anything you type in between a ‘.’ and a ‘-’ in a scene heading line. In practice this means the part marked in bold in this example would be added to the project auto-complete list: “EXT. **THE RED LION** - NIGHT”. When words and phrases are added to the project auto-complete list in this fashion, they will be assigned a scope ([subsection C.6.1](#)) which restricts their eligibility to only when you are typing within that element. A character name will not suddenly pop up in the slugline, for instance. You can adjust the scope of automatically added phrases using the main project auto-complete list.

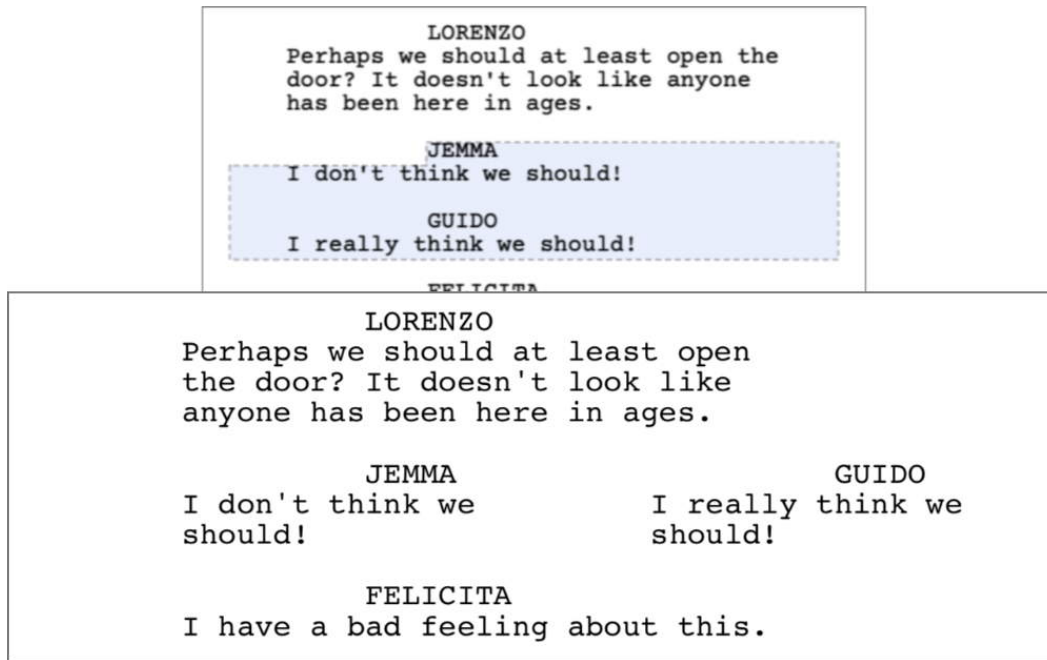
### 19.1.4 Dual Dialogue

When compiling scripts to Final Draft (.fdx) format, or Scrivener's own Print and PDF output, you can designate text as being dual dialogue by fully surrounding both bits of dialogue (including the character names) in a **Format ▶ Preserve Formatting** block. Refer to [Figure 19.1](#) for a before and after example.

Refer to the Text Layout compile format pane for further options relating to PDF and print output ([subsection 24.6.5](#)).

---

<sup>1</sup> You should in general not use this list to assign project specific completions like named locations. It is best to use the Auto-Complete tab in Project Settings for this ([section C.6](#)).



**Figure 19.1** Use Preserve Formatting to mark dual dialogue, as shown when printed from Scrivener.

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## 19.2 Using Page View to Estimate Page Counts

While the point should remain stressed that Scrivener is not designed at any level to provide a completely accurate pagination solution—with rigid formatting, such as that used by most scriptwriting formats, and a few optional settings, it is possible to get closer to an accurate page count, when using Page View ([section 16.2](#)) mode.

The first thing you will need to do is switch Scrivener’s default Scrivenings separator from a divider line to “Minimal”, which can be set in the Appearance: Scrivenings settings pane ([subsection B.5.13](#)) via the **Scrivenings Separator** setting. This version uses a “zero-height” display model which will not introduce page inflation over long documents, like the standard divider will. You will also want to disable the usage of Scrivenings titles for your project, with **View ▶ Text Editing ▶ Show Titles in Scrivenings**, as it will likewise expand the overall height of the document over large sections.

### Scrivenings View and Scriptwriting

When creating a scrivenings session, if the session includes a mix of script formatting documents and regular documents, Scrivener will determine which mode to use based on the type which has the most entries in the session. This means, if you create a scrivenings session with 4 standard documents and 2 script documents, script mode will not be on by default. In the other direction, if there are more scripts than standard documents, script writing tools will be enabled in those standard documents. You can switch modes while in scrivenings with the **⌘8** shortcut. This will only impact (globally) the scrivenings session, and not any of the underlying files.

Finally, you will need to ensure that the paper size is set up correctly in the **File ▶ Page Setup...** dialogue.

If you work with scripting formats quite a lot, you might wish to ensure that **Show page view in new projects** is enabled in the Appearance: Page View settings pane as well.

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## 19.3 Working with Final Draft

Scrivener supports Final Draft 8 or greater. Older versions cannot work with the .fdx files Scrivener can import or export.

### 19.3.1 Importing Formatting from a Final Draft Document

#### Optional Step

For basic scripts or those that will use Final Draft's standard screenplay formatting—indeed, for most screenplays—this step can be omitted, as it is mainly concerned with setting up the formatting for custom scripts. Proceed to the next section if this is the case.

Whenever you import a script from Final Draft into Scrivener, all of its elements will use the formatting specified in Scrivener's script settings. These can be set up by selecting "Script Settings..." from the Scriptwriting submenu of the Text menu. The Script Settings panel should be familiar to anyone who uses Final Draft.

Given how Scrivener works with scripts, it is important that the script settings are set up *before* importing or creating any script documents in the project, so that element name can be properly matched with the imported .fdx file.<sup>2</sup>

Fortunately, this is very easy to do, as Scrivener can read the formatting directly from an FDX file:

1. Open the Script Settings panel by using the **Format ▶ Scriptwriting ▶ Script Settings...** menu command.
2. Click on the “Manage...” dropdown in the bottom left corner of the panel.
3. Select “Load from Final Draft .fdx or .fdxt...”
4. In the open panel that appears, select the FDX file to import the settings from.

This will not import the actual script found in that file, only its elements and formatting for use in the current project.

5. Click **OK** to save the changes into the project. At this point you may be asked to confirm conversion of any existing documents in the project. Briefly make sure the conversions from one element to another are in order.

To test the new format, create a new document, choose the new scriptwriting format and start typing (changing elements using tab and enter or using the pop-up menu in the footer view beneath the editor). You will see that the script uses the formatting of the FDX file. Now that this is set up, you are ready to import the .fdx file as a script, as described in the following section.

To save the format for future use in other projects, use the same **Manage...** dropdown menu in the Script Settings panel and select “Save for use with other projects”. The imported script format will now appear in the main scriptwriting menu for all projects. The name that you choose for this script, given at the top of the panel, will be used in the menu.

## 19.3.2 Importing FDX Files

You can import FDX files into Scrivener in one of two ways. Both are fully featured but the second option can cut up the script file into smaller scenes automatically, creating a more detailed outline in your Draft folder:

1. Using the standard file import methods; drag and drop into the project binder, or use **File ▶ Import ▶ Files....**

---

<sup>2</sup> Scrivener can hold many different script documents but can only use one script format in a project at a time; this is why setting up the format must be done separately from importing a script.

2. With the **File ▶ Import ▶ Import and Split...** command, select the FDX file that you want to import. See Import and Split ([subsection 9.1.6](#)) for further details.

Many features will be retained: script notes become Scrivener notes, revisions are marked up in red (level 1), highlighting is retained and so on.

If you wish the FDX file to be part of the script that will eventually be exported, be sure to import it into the “Draft” folder, or drag it there after importing.

### 19.3.3 Exporting Individual Documents to FDX

To export individual scripting documents to Final Draft, select the documents you want to export in the binder and then go to **File ▶ Export ▶ Files...** Select “Final Draft (.fdx)” as the export format.

The exported file should open in Final Draft with all features intact.

More commonly you will want to combine all of the scripting documents in the Draft folder of your project into one FDX file:

1. Use the **File/Compile...** menu command.
2. Select **Compile for:** “Final Draft (.fdx)” at the top of the window.
3. Select “Script or Screenplay” in the left sidebar.
4. Assign section layouts if necessary ([subsection 23.3.3](#)), and check through the various option panes on the right-hand side.
5. Click on **Compile...** and choose a filename.

You should find that some formatting will be converted—footnotes & comments become script notes, revisions in Scrivener carry over, and so on.

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## 19.4 Importing a Script from Other Programs

Because Scrivener is not a dedicated scriptwriting program, the way it handles script elements is different from Final Draft or Movie Magic Screenwriter. Scrivener recognises elements by their paragraph formatting, more like how you might format a script in a traditional word processor. For instance, if a paragraph has a three-inch left indent and single line spacing, Scrivener will look up this formatting in the list of script elements, and if an element is found with matching formatting its name will be selected in the elements pop-up button in the footer view. If no elements match, “General Text” will be selected.



This means that if you import a script into Scrivener from another program and want to continue working on it, the script format mode selected in Scrivener must exactly match the formatting of the script you have imported.

### Importing old Final Draft documents

Refer to the section on exchanging files with Final Draft, version 8 and greater ([section 19.3](#)). For users of Final Draft 7 and earlier, you can import scripts created in Final Draft by using “Save As” in Final Draft to save your script in “File Converter” (FCF) format, then import the resulting .fcf file. Scrivener will try to match the elements in the FCF script to the elements in the current script format. For projects that use the basic screenplay formats, this should be all you need to do to import a script with all of its elements recognised.

## 19.4.1 Importing Other Scripts as RTF

If your script formatting was not recognised, or if you imported a script that has no matching script mode in Scrivener, you will need to create your own format mode that matches the script using the **Format ▶ Scriptwriting ▶ Script Settings...** panel.

This method can also be used to recover Scrivener formatted script files, if the original scripting settings have been lost for one reason or another.

Here’s how:

1. Export the script from your scriptwriting program as an RTF file.
2. Import the script either by dragging the RTF file from the Finder into Scrivener’s binder or by using **File ▶ Import ▶ Files...**
3. Ensuring that the script is visible in the editor, click into a line of text that represents one of the elements you want to be recognised (for instance, by clicking into a line of text that should be a scene heading).
4. Open the Script Settings panel with **Format ▶ Scriptwriting ▶ Script Settings....**
5. Enter a title for your new format in the “Format Title” text field.
6. Select the first element in the list and give it the name you require (i.e. the name of the element in which you placed the cursor in step 3) by double-clicking into it and editing it if necessary.
7. From the **Manage...** dropdown menu in the Script Settings panel, select “Use current font & paragraph settings”. This will copy the font and paragraph information from the line of text in which the cursor has been placed in the editor into the Font and Paragraph panes of the Script Settings panel.

Repeat this process, matching the settings for the elements in the Script Settings panel with the text in the editor for each element in your script.

Be sure to save your script format for use with other projects using the **Manage...** pop-up button at the bottom of the Script Settings panel.

You can then use your new format with all projects in the future for any scripts you import. Once you have successfully created your own script format mode, all of the elements in your imported script should be recognised in the pop-up button in the footer view of the editor, and you should be able to use the script mode to continue editing your script. Note that more complicated script formats may require a little more tweaking to be recognised, but the above process should work for most.

If you do create a script format mode that recognises elements from an imported script, please use “Save to file...” in the **Manage...** pop-up menu from the Script Settings panel to save your format as an XML file somewhere safe on your hard drive so that you can back it up and load it on other machines or following a hard drive reformat if necessary. Also, please feel free to upload such format files on the forums, where other Scrivener users may find them useful—or from where you can always download them again should you lose them.

## 19.4.2 Importing Plain Text Formatted Screenplays

A number of screenplay-oriented programs (such as Movie Magic Screenwriter) support what is known as a plain-text formatted screenplay. Since the roots of this format come from the days of the typewriter, everything about the format can be reproduced with plain-text spaces and characters.

### Looking for Fountain Support?

Plain text screenplays are not Fountain files. They in fact look just like the screenplays you'll be printing from software like Scrivener or Final Draft. Refer to Working with Fountain ([section 19.6](#)) for tips on importing files in this unique form of markup.

Scrivener is capable of both creating ([subsection D.5.4](#)) and importing these simple files:

1. In the binder, select the location to import the screenplay.
2. Use the **File ▶ Import ▶ Plain Text Formatted Screenplay...** menu command to bring up the file selection dialogue.
3. Navigate to and select your .txt file on the disk and click the **Open** button.  
By clicking the **Options** button in the lower left of the import dialogue, you can choose to have the imported script split by scene, into individual binder items, rather than as one log file.

An alternative method is to paste plain text screenplays into Scrivener, with the **Edit ▶ Paste Plain Text as Screenplay** menu command. This must be done into a document that is using script mode (§8).

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## 19.5 Printing or Exporting a Script

You can use the compiler to print your script (or to turn it into a PDF file). For examples of how to do this, take a look at one of the scriptwriting project templates by going to **File ▶ New Project...** and selecting a project template such as the Screenplay template. Read the instructions that come with the template to see how to set up your project so that it is formatted properly when printed (or exported).

In the majority of cases, just as you would with many other types of writing in Scrivener, you will want to export your script from Scrivener so that you can do all the final formatting in a dedicated formatting program such as Final Draft, see Exporting Scripts ([subsection 23.5.2](#)) for information on how to use the Compiler to export to many popular scriptwriting programs.

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## 19.6 Working with Fountain

**Fountain** is a simple markup language (based loosely upon [Markdown](#)) designed for screenwriters who need or prefer to work in a plain-text environment. Fountain makes composing and editing easier, without losing the individual meanings behind the elements (character name, action, transition, etc.). From the Fountain website:

Fountain is a simple markup syntax for writing, editing and sharing screenplays in plain, human-readable text. Fountain allows you to work on your screenplay anywhere, on any computer or tablet, using any software that edits text files.

Taking its cues from John Gruber's Markdown, Fountain files are eminently readable. When special syntax is required, it is straightforward and intuitive.

Even when viewed as plain text, your screenplay feels like a screenplay.

Fountain supports everything a screenwriter is likely to need in the early, creative phases of writing....

### Fountain is for Screenwriters

One important detail to remember is that Fountain has been designed for screenplays. Using it with other scriptwriting formats is not supported as it may work unreliably or not at all. If you do wish to try using Fountain with another scriptwriting format, all you need to do is make sure that the elements ([section 19.7](#)) are named precisely as they would be in the standard screenplay format.

When importing or syncing Fountain files, they will be processed and converted to Scrivener's internal scriptwriting system. There is no need to use the markup conventions while writing within Scrivener. The following additional conventions will be converted to Scrivener features:

- *Boneyard markers*: text found between `/* boneyard markers */` will be imported into Scrivener as struck-through text (and struck-through text will be exported in boneyards).
- *Dual dialogue*: when using the syntax for dual dialogue it will be converted to Scrivener's convention of placing the characters and dialogue in question in a Preserve Formatting block ([subsection 19.1.4](#)). Likewise adjacent dialogue marked with Preserve Formatting will be marked in exported Fountain files.
- *Script notes*: when importing, text marked as a script note that appears entirely on its own line(s) will be placed as an inline annotation. Otherwise, when script notes are added to text that is otherwise an element, they will be anchored to the nearest word and linked as comments in the Inspector.<sup>3</sup>

Scrivener uses inline annotations in cases where script notes are on their own paragraph to avoid potential problems with removing the text and causing elements around that text to lose their syntax. For export, all annotations and inspector comments will be converted to script notes, if you opted to include them in your settings.

Scrivener can import the Fountain format using two different methods:

- *As a whole script*: merely drop the Fountain file into the binder. Scrivener looks for the 'fountain' extension, so make sure the file has had its extension changed accordingly, otherwise the file will be handled as plain-text. When properly handled, all elements should be imported and formatted automatically to the screenplay script format.

<sup>3</sup> If you prefer one form of annotation over another, you can use the **Edit ▶ Transformations ▶** submenu to switch between styles.

- *Split up into scenes*: as with Final Draft files, use **File ▶ Import ▶ Import and Split...** to select the file. Again, it will need a ‘fountain’ extension to be properly recognised and imported. This will result in a new binder item being created for each discovered slug-line. If a section header has been typed in immediately prior to the slug-line, it will be used to populate the binder item title<sup>4</sup>. Fountain synopsis texts will be gathered from throughout the scene and combined into Scrivener’s own synopsis index card. Read more about Import and Split ([subsection 9.1.6](#)).

For integrating with a mobile device, Fountain is a selectable format in the folder synchronisation feature ([section 14.3](#)).

In addition to syncing and exporting, projects can be compiled to the Fountain format.

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## 19.7 Creating Your Own Script Formats

Scrivener comes with a number of script formats built in. You can also create your own script formats tailored to your own requirements; as well as export and import script modes for sharing on the Internet.

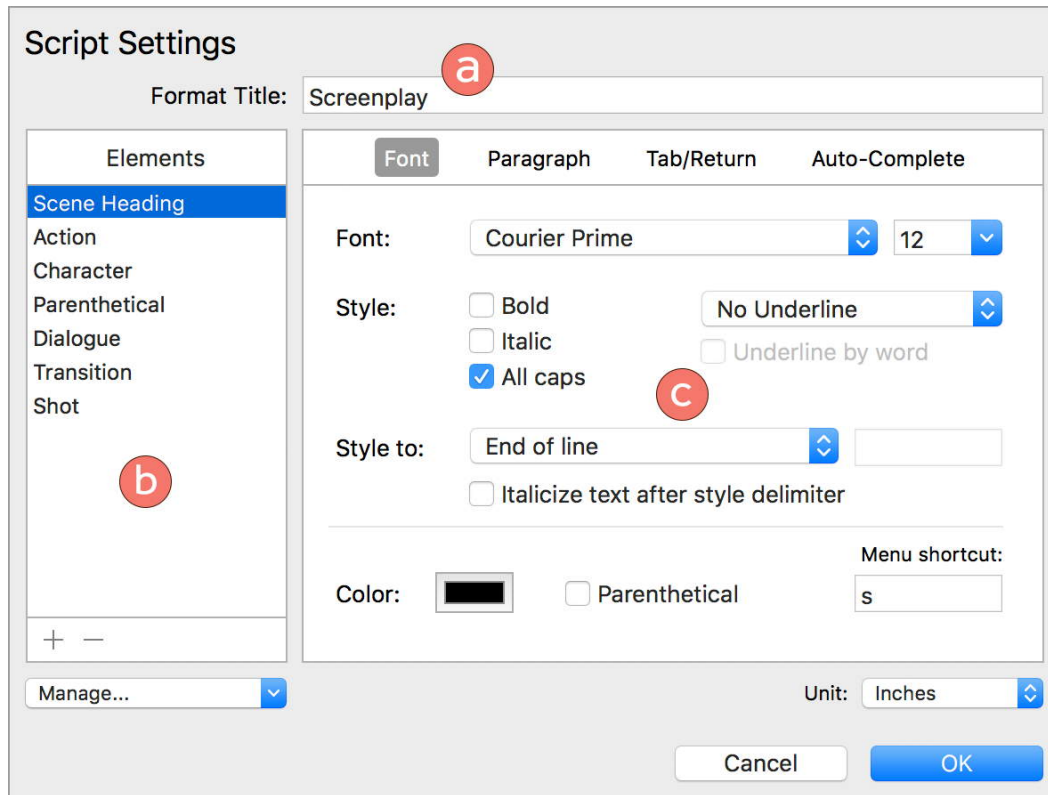
To create your own script format mode, use the **Format/Scriptwriting/Script Settings...** menu command to bring up the script editing interface. At the top of the panel is the **Format Title** text field ([Figure 19.2](#)), marked (a). Enter the name of your format, as it will be displayed in the main menu, should you save these settings for future use beyond the current project.

On the left side of the panel is the Elements list, marked (b). Here you define the parts that make up your script, such as “Scene Heading”, “Dialogue” and so on.

- You can add new elements and delete existing ones using the **+** and **–** buttons beneath the list, and you can rename elements by double-clicking them.
- Reorder elements by dragging and dropping them; this will change their numerically based keyboard shortcut assignment.
- The “General Text” and “General Text (Centered)” elements are displayed while working on the script in Scrivener, but will not appear here as they have no special properties by definition—they merely represent text not assigned to an element in this list.

---

<sup>4</sup> Note that while Fountain has support for multiple levels of depth with its header syntax, Scrivener’s scene import will produce a flat list.



**Figure 19.2** All aspects of script formatting and behaviour are established in the Script Settings window.

The large tabbed area marked (c) is where the settings for the current element, selected in the sidebar, can be viewed and modified. We will cover each tab of settings in this area of the manual.

If you need to use a system of measurement other than inches, use the dropdown menu in the lower right-hand corner to change the **Units**.

Clicking **OK** saves the script format into the *current project package only*. This means that if you share your .scriv project with someone else, they will be able to use these settings without having to install anything. No further actions are necessary unless you wish to export your script to other projects or machines.

### 19.7.1 Managing Scripts

In the bottom left-hand corner of the script settings panel is a dropdown menu entitled **Manage....** The menu provides several management functions not found elsewhere:

**Reset to defaults** Reverts all customisations that you have made to the Script Settings panel to the Screenplay default. If you wish to revert to a saved script setting, simply select that script from the **Format ▶ Scriptwriting ▶** sub-menu, instead of using this tool.

**Use current font & paragraph settings** Attempts to import all available character and paragraph level formatting attributes from the editor into the *currently selected* element in the above element table. This can be quite useful when you have imported a script from another program and wish to create a script format from the existing text. Simply click through the document, locating element types, and use this tool to import the correct formatting into each element type.

If you have a file in Final Draft 8 format or above, you will want to use the “Load from Final Draft” tool, mentioned below, for scanning .fdx files for types, rather than doing all of this by hand.

**Load from file...** Loads a Scrivener script format file from the disk. Use this if you have downloaded a script from the Internet, or are in the process of transferring formats from one computer to another.

This will not install the saved script into your Scrivener support folder, it will merely import the settings into this one project. Use the “Save for use with other projects” command, following this one, to install it system-wide.

**Load from Final Draft .fdx or .fdxt file...** Scrivener can examine an existing Final Draft or Final Draft Template file for formatting rules and names, and attempt to convert them to Scrivener’s internal script formatting.

**Save to file...** Saves your current settings to an external file that you can easily backup, upload to the Internet for sharing, or send to another of your computers.

**Save for use with other projects** Installs the project’s current script settings to your system for usage in all of your projects. If you wish to share the file with others, or transfer them to another computer, use the “Save to file...” option to more easily create an accessible file for sharing.

## 19.7.2 Format Tabs

On the right of the panel is a tabbed view containing all of the options used to configure each element. Select the element from the list on the left, and then select the appropriate tabs needed to make your adjustments. This section will describe the settings available in each of these tabs.

### Font Tab

The Font tab provides options for setting the character appearance for the selected element, as follows:

**Font** Set the font family for the current element, and the size of the font (in points) to the right. Scrivener does not use the font to identify elements, so



you can change the font here without messing up Scrivener's recognition of script elements. This also holds true for font changes made in the editor.

Scrivener comes with **Courier Prime** installed within it, and will use it by default over the standard system Courier. If you have Courier Final Draft installed on your machine, it will however prefer that font.

**Style** Provides a number of options for determining the appearance of the current element, mostly self-explanatory. The **All caps** style option will convert the literal text case to all caps, rather than simply displaying it that way. Be careful when experimenting with this setting on existing text, as it is not possible to convert capital letters back to whatever they were before conversion.


**Style to** Defines how much of the line to apply these settings to:

- *End of line*: the default setting; styles the entire paragraph from start to finish.
- *First tab*: the element will be styled up until pressing the **Tab** key. This accommodates formats such as the UK stage play format, which has character names and dialogue on the same line, with character names in capital letters followed by a tab and dialogue in normal case.
- *Character delimiter*: provide the characters in the text field to the right. For instance, if you entered a colon in the text field, the element would only be capitalised up to the first colon.

**Italicize text after style delimiter** When **Style to** is set to anything other than “End of line”, the remainder of the text on the line will be italicised.

**Colour and Adornment** Two further options can change the appearance of elements:

- *Color*: The text of this element will use the specified colour. Click on the colour chip to select a colour using the palette.
- *Parenthetical*: automatically encloses the current element in parentheses.

**Menu shortcut** Enter the single letter or number that will be used within the script elements menu (Y) as a shortcut key.

## Paragraph Tab

The paragraph tab provides paragraph formatting for the selected element:

**Alignment** Sets the current paragraph alignment (left, centred, right or justified).

**Spacing** Sets the line-height multiplier (single, 1.2, 1.5 or double). Some script formats (such as Screenplay) will have a **Fixed Line Height** setting, behind the **Options** button in the lower right-hand corner of this pane. You will need to set the fixed line height to opt to disable that feature, before seeing any effect on this setting.

**Spacing Before** Sets the number of blank lines to appear between the current and previous line.

### Ruler Conversions

When working with units in Scrivener, bear in mind that its ruler starts at margin zero instead of paper zero. Since Scrivener is, by and large, not “aware” of paper settings and page layout, it counts its ruler settings from the beginning of the text on the left end of the page, not the beginning of the paper itself.

Consequently, to convert most standard measurements to useful values, you will need to factor in the standard amount of print margin used to print the script. For example, if the Scene Heading is specified to begin at 1.5ins from the edge of the paper, you will need to subtract the margin of 1in from that to get 0.5ins.

**Indent and Tabs** Allows simple customisation of the ruler settings for each element.

- **First Line Indent** sets the offset of the first line the paragraph.
- **Left Indent:** sets the left indent of all lines following the first. To create a uniform “block indent” look, set this value identical to the **First Line Indent**.
- **Right Indent:** sets the right indent of the paragraph (as measured from the left margin, so 6.5ins will fall at 7.5ins when printed, or one inch away from the right edge of the paper on US Letter).
- **First Tab:** sets the first tab stop of the paragraph.

### Options

Further options for advanced paragraph settings and compile output options for this element are accessible by clicking on the **Options...** button in the lower-left corner of the tab:

**Writing direction** Set right-to-left, left-to-right or “natural” (detect based on the system language input settings).

**Fixed Line Height** In most cases this should be set to the font size in use (12pt by default), to keep lines absolutely consistent, as is expected in most scriptwriting standards.

This should be disabled if you need to use the **Spacing** setting in the main Paragraph tab—but do note this comes at a risk of line-heights being slightly different from Final Draft measurements. You will also want to disable this feature if you intend to use a font that deviates from Courier 12pt, as font clipping can occur with larger fonts.

**Default Tab Interval** Similar to the **Default tab spacing** setting in The Tabs and Indents Tool ([section 15.7.1](#)). This sets the default tab spacing, rather than inserting physical stops you can see and move around on the ruler. Set to “o” to disable.

**Minimum number of tabs** Ensures that there will always be the indicated number of tab stops on a line, if less than that amount are created manually. This helps to avoid cases where long character names in stageplay formatted scripts could cause Tab to advance to the next line.

**Keep with next paragraph** Strive to keep this element bound to the following paragraph in cases where the two might become separated by a page break.

**Add prefix when compiling** Inserts text in front of anything else you type in yourself. This will most often be useful in conjunction with a placeholder counter that numbers elements, but the choice is yours. In particular, take a look at the `<$np>` tag, which counts by numeral (1, 2, 3...) and resets itself automatically on *each page* (when using print/PDF).

**Only add prefix when compiling to print/PDF** Mainly useful when using the aforementioned placeholder counter, which only works with these two compile types.

**Sequential numbering** This is the option you are looking for if you need a way to number your scene sluglines, using the standard method of placing the number along the very outside edge of the typing area. This can be an otherwise difficult look to achieve with Scrivener, since you ordinarily cannot place text outside the physical margin area of the page.

Numbering can be done “against left margin”, “against right margin” or “against both margins”. Set to “None” to disable this feature.

## Tab/Return Tab

The Tab/Return pane provides control over **Tab** and **Return** key behaviour for the selected element, which can be used to aid in the flow of writing. If you are creating a scripting environment from scratch, you might wish to save this step for last, since you will need to reference other elements (which may not exist while you are going through the list, initially).

**On return** Sets which element formatting the text will use when you hit the **Return** key. Using Screenplay as an example, the “Scene Heading” element will advance to the next line and select “Action” as the active element for it.

Use the **Add colon before return** option if the script format dictates separating these two elements with that character.

The options in the “Tab behavior” section concern how that key will behave when used in lines of this element:

**Allow tabs** If this is checked, the tab key works as it would normally, that is, it inserts tabs. With this checked, none of the other options for tab behaviour are available.

**Tabbing on an empty line** Choose an element from the **Go to** dropdown to set which element will be selected when you hit **Tab** on an empty line. This facilitates switching to a common alternate element. For instance, in the Screenplay format, if you are at the beginning of the line using Dialogue, you can hit the tab key to switch to Parenthetical instead.

**Tabbing after typing** Selects which element to jump to next from the **Go to** dropdown (inserting a new line automatically). Use this to provide a convenient secondary behaviour, where the primary behaviour is usually assigned to the **Return** key.

**Insert** Both of the tab options here provide for an alternate behaviour of inserting text when pressing **Tab**. By providing text in either of the **Insert** fields, the **Go To** behaviour will be disabled. E.g. hitting **Tab** after typing something in a Scene Heading element automatically inserts a hyphen so you can enter a chronological marker.

This field accepts the placeholder tag, `<$mediaPlaybackTime>`, which will insert the current playback time for the active media player in the other split. If no media player is currently available then the placeholder will print question marks instead. The “Transcript” script format, meant to be used for transcribing interviews, makes use of this placeholder.

By default the placeholder will use the time format specified in the Behaviors: Playback settings pane ([subsection B.4.8](#)), under **Media time stamp format**.

## Auto-Complete Tab

The Auto-Complete tab allows you to set a custom list of words that will appear for auto-completion while typing in the current element.

These entries are intended for generic or broadly used phrases that are specific to each element type (such as “V.O.” in a character line). If you’re looking for a

way to add names and phrases specific to a particular script, the project's own auto-complete list is a better place for them ([section C.6](#)).

By default, these phrases will be suggested automatically as you begin typing in matching letters. For each entry, you can check the “Go to Next Line” box, which will force the editor to move to the next element (as it would if you pressed Return) once it has been entered.

- *Add a new entry to the list:* select where you would like to insert the new entry, then click the **+** button, or press the **Return** key.
- *Removing entries:* select the row to remove and click the **–** button or press the **Delete** key on your keyboard.
- *Editing entries:*
  - Start editing a selected row by double-clicking on it.
  - Confirm editing by clicking outside of the field or pressing the **Return** or **Esc** key.

**Include project completions for this element** Automatically include a project's auto-complete words when providing suggestions. When disabled, this element will only offer completions from the list above.

**Automatically add phrases to project list that occur...** In the following fields provide two characters to help in isolating useful part of a phrase (such as locations and character names) from the text surrounding them. If a field is left blank, then anything on the line will be used, up to any character defined in the opposing field.

An example for the Character element would be to add anything typed into the character field prior to an open parentheses, and thus avoiding such common markers as “(O.C.)”.

**After project list completions** When a project list auto-completion has been used, you can set up the scripting system to do nothing, go to the next line, or insert a tab.

To again use the Character element, if you select a character name from the project list it will automatically advance to next line (Dialogue by default).

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## 19.8 Using Script Formatting for Other Purposes

While the Scriptwriting mode was originally designed for scriptwriting, it deserves mention that it is at its heart nothing more than an automated styling

engine. This means it can be used for a variety of purposes having nothing to do with scriptwriting.

We have included two such examples in the software:

- *Interview*: a simple Q&A format using alternating boldface and normal formatting, as is common for indicating dialogue between an interviewer and interviewee.
- *Transcript*: if you are transcribing from an audio or video file and need to make notation of the timestamps at each point of dialogue, this script format will make that easy.

To use this script mode, you will need to have a media file loaded in a second editor split. Pressing Tab on a new “Time & Text” or “Speaker, Time & Text” line will insert the current media time stamp. Refer to Viewing Multimedia Documents ([section 8.1.3](#)) for further transcription tips.

If you need to create a procedurally formatted document where cascading and switching between structural types would be of benefit, then consider using the Scriptwriting engine to create you own format from scratch.

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# | Writing Tools

20



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## 20.1 Goals and Statistics Tracking Tools

At some point, most writers will need to get some idea of the progress of their work by checking the word, page count or characters. There are several ways of doing this in Scrivener, depending upon the scope you require:

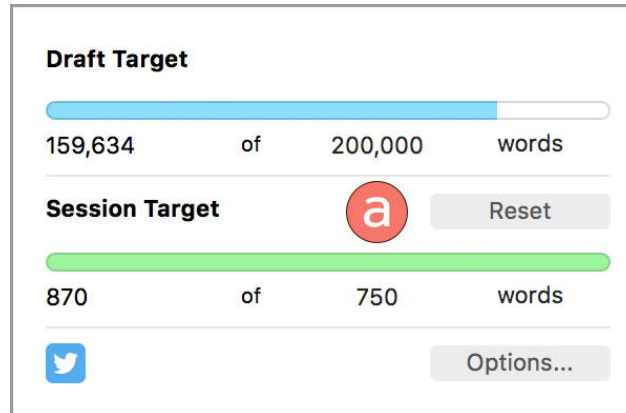
- To get detailed statistics and word frequency tabulation for the whole of the draft (that is, the contents of the Draft folder as it will compile given the current settings) use **Project ▶ Statistics...** and click on the “Compiled” tab.
- For stats on the current document or selected items, click the “Selected Documents” tab from the same **Project ▶ Statistics...** panel.

- To set a target word or character count and track your progress for the entire draft or the current writing session, use the **Project ▶ Show Project Targets** menu command, or hold down the **Option** key and click on the Quick Search field in the main application toolbar.
- To set a target word or character count and track your progress for a single document, click on the target button in the bottom-right of the footer view (this is not available in scriptwriting mode, where word and character counts are rarely useful anyway). See information on the footer bar for more information ([subsection 20.1.2](#)).
- Tracking a *group* of documents together as a cohesive unit, like say a sequence of sections and sub-sections within a folder, where the important detail is the word count of the entire folder is possible.
  - You can use the Outliner to view the Total Progress and Total Goal columns, to aggregate statistics for group of documents.
  - Setting a target on the chapter folder will, even if it has no text itself, work as an aggregate in Scrivenings mode, since child items will be included in the totals. Thus all words written to any subdocuments of it will count toward that aggregate goal, even if they themselves do not have individual goals. Targets for folders can be easily set by using the Target column in the Outliner, or by selecting the folder in the Binder, switching off the current group view mode, and using the target button as per normal in the text editor footer bar.
- To get the word or character count for a selection of text, select some text in a document and examine the footer bar of the editor. The word and character count will appear in blue text. When there is no selection, this area will be used to count the entire document or Scrivenings session.
- To view a combined word and character count of an arbitrary selection of documents, use the outliner or corkboard to select several documents, and then right-click on the selection. The combined word and character count for those documents will appear greyed-out at the bottom of the contextual menu. Note this method only counts texts within the actual selection, not the implied selection in the case of children beneath the selected items. To count them as well, use the **Edit ▶ Select ▶ Select with Subgroups** menu command.

### 20.1.1 Project Targets

The project targets panel allows you to set goals for your writing—either for the Draft as a whole or for the number of words you want to write during the current session—and to check on your progress as you work, whether to grow the word

count or trim it down. To bring it up, select **Project ▶ Show Project Targets** or press **⇧⌘T** to toggle its display.



**Figure 20.1** The blue progress bar shows overall progress for the project, while the green progress bar indicates the writer has achieved their session goal and is now writing in surplus.

The targets panel displays two progress bars: one showing the progress of the draft and the other showing the progress of the current session.<sup>1</sup> Using this panel you can set a target word count for the draft, or presumably your current work-in-progress, and independent goals for the current session.

To set up targets:

1. Click in the appropriate text field—marked above or below (a) in [Figure 20.1](#)—and enter your target.
2. Set whether the target should be in words, characters or pages by clicking on “words”, to the right of the number fields.

This panel will float over your project if you leave it open, and update itself in real-time as you write and edit. By default, the Quick Search tool in the toolbar ([subsection 11.5.3](#)) will also display small progress bars correlating to this information, so you needn’t keep this panel open if all you want is a small visual reminder of how far you have yet to go.<sup>2</sup>

<sup>1</sup> By default it will automatically reset shortly after midnight, but there are options available if you find this inconvenient, discussed in the following section.

<sup>2</sup> If you want to track a goal for an individual document, rather than the entire project, use the Document Goals ([subsection 20.1.2](#)) tool in the footer bar.

### Using targets to hit an editing goal

The targets tool needn't only be about writing more words to reach a goal, it can also be used to establish a word count you'd like to cut down to. Use the **Show overrun** setting, discussed in the following section, to make it so a secondary progress bar will inform you as to how far *over* the target you are.

The following describe what constitutes “writing activity”, for the purposes of what the session tracking tool monitors:

- If you delete lots of text, session statistics will not start showing any progress until you have written as much again—it is perfectly possible to have a negative session word or character count! In other words, it shows your net gain during the session.
- Additionally, the session target only counts text that has been typed or pasted into a main text area, it does not count imported documents, duplicated sections, appended text and so forth.
- The basic rule of thumb is that if what you did to add or remove text was done inside of the text editor, then it will be added or subtracted from the count. If you used menu commands to move, generate, duplicate or copy text then it will not be counted.

If you find yourself in a situation where you want to start fresh, because the counter is off, you can use the **Reset** button above the Session Target progress bar to reset the counter to zero.

### Project Targets Options

Click the **Options...** button in the Project Targets panel to configure how these progress bars are calculated, and what Scrivener should do if you meet your goals. There are a few common options available at the bottom of the pane, below the tabbed areas:

**Show target notifications** System notifications will be posted when the status of your targets change. For example if you achieve the writing goal for your current session. Notifications will be posted for the following conditions:

- The draft or session goal has been achieved.
- Editing you have done has cause the count to dip back under the respective goal.
- When **Show overrun** is enabled in the “Draft Target” tab, if you go over the allowed amount you will be alerted.

- Likewise you will be alerted when you edit back down under the maximum allowed amount.

**Show Twitter button** If you do not use Twitter you can remove the button.<sup>3</sup>

### Draft Target

**Count current compile group only** When enabled, only those files descending from the “Compile” group selection, designated in the contents tab of the compile settings area ([subsection 23.4.1](#)), will be counted. By default this will be the entire “Draft” folder, but it can be set to any subfolder, or even to dynamic sets of files such as the results of the last project search you ran, or your current binder selection.<sup>4</sup>

This setting *only* pertains to the compile group selection itself. Filters that subtract from the group or the front and back matter features, which add to the group, will not be considered by the Targets tool.

**Only count documents set to be included in Compile** Exclude any texts that do not have the “Include in Compile” checkbox set ([subsection 13.5.1](#)).

**Show overrun** Modifies the behaviour of the progress bar so that once you achieve your goal, a second progress bar (in bright red by default) will begin to advance from left to right, depicting how many words *over* your target you are. This can be a great tool when editing, and looking to trim the overall word count down by a certain amount.

**Overrun allowance** This subsidiary option to the above provides a threshold by which you can exceed your stated goal before triggering the overrun condition and seeing the red progress bar appear. This value subtracts from the overrun amount—in effect once an overrun condition is reached, *then* the progress bar starts counting from one on up. Thus a goal of 100,000 words with a threshold of 1,000 will consider your overrun amount as being only “10”, if your draft has 101,010 words.

**Deadline** When active, adds a countdown toward the days you have left at the bottom of the target window. This can also be used to calculate how many words you need to continue writing per session in order to meet your deadline, in the Session Target tab.

---

<sup>3</sup> This option will not be available in macOS 10.14+, as Apple removed Twitter integration.

<sup>4</sup> In the case of collections and search results, the list of items designated to be counted will only be refreshed after visiting the compile overview, even if only to load the pane and then cancel it.

## Session Target

**Reset session count** There are four available options for how the session counter should behave. The counter can be reset every time a project is closed, you can have it track the time of day and reset it for you, or turn off automatic reset entirely and handle it manually with the reset button.

- *At set time each day*: the default behaviour is to reset the session target at 1:00 in the morning. This will occur even if you are writing mid-sentence, so if you're a night owl you might want to change when the reset happens, or use one of the other options.
- *On project close*: if you prefer to consider a session concluded whenever you close down a project then this will be the best option. If you prefer multi-day sessions or perhaps prefer short writing bursts throughout the day, this will be a good option for you.
- *On next day opened*: with unusual schedules, such as those who write well after midnight and unpredictably so, this alternate method of reset may work better. It will check against the last time you opened the project, and if the calendar day has incremented since then it will reset. Thus, if you open the project at 22:00 and work until 03:00, when you open the project later on that day at 13:00, it will reset since you last *opened* the project on the prior day at 22:00. If you start another session that night, however, it will not reset, since the last time you opened it was at 13:00 on that same day.
- *Never*: Scrivener will never alter the session progress counter for you. You will need to use the **Reset** button to start a new session. This is the best mode if you tend to work sporadically all around the clock in short bursts, or tend to set aside a “session” for a few days to deal with other tasks.

**Count text written anywhere in the project** Turning this on will count anything you type or paste into the *any* document in the project binder, even if it is a character sheet or a grocery list.

This setting also impacts whether documents that are not marked as “Include in Compile” in the inspector are counted. When this setting is off, such documents will not be counted even if they are in the draft folder. If the option is enabled, even those documents marked as excluded will be monitored as you write.

**Allow negatives** When disabled, the session counter will never drop below zero. Leave this on to get an accurate net total of your writing session. When disabled, deletions will still be counted, but only until the counter reaches

zero, so some deletions would no longer be counted after that point, making it less accurate for calculating the true net.

**Automatically calculate from draft deadline** Requires the **Deadline** option to be enabled in the “Draft Target” tab, and the counting method to be either Words or Characters (set in the main Targets panel itself).<sup>5</sup> When a deadline has been set, you can have Scrivener handle the calculation required to meet your deadline given the amount of time left. For example, if you are at 85k words in a 100k draft and have 10 days left to finish, then Scrivener will set your daily session goal to 1,500 words per day. If you come in under or over that goal, Scrivener will adjust the daily session target whenever the session count for any reason.

**Writing Days** By default, all days are considered eligible for writing, for the purpose of calculating your daily goal against the deadline. If you cannot write every single day of the week, simply click on the days you can write, and the feature will adjust the calculation so that you don’t end up writing below the curve.

**Allow writing on day of deadline** The calculator typically will not schedule you to be writing on the actual deadline day. If you want the system to give you up until the last minute, check off this box.

## 20.1.2 Document Goals

Each document in your binder is capable of storing its own independent goal, which can be a great tool if you’re trying to ration out how many words the different sections of your draft should have. To set a goal for a document, click the target icon on the right hand side of the footer bar (Figure 20.2).



**Figure 20.2** Click the “bull’s eye” target icon to set a goal for this document.

When a goal has been set the target button will turn into a small progress bar that will fill up as you type, turning green, by default, once you exceed the goal.

Trimming sections down in the editing phase instead? You can also set an overrun warning, which will use a different colour to show how far *over* the target you are.

<sup>5</sup> This is down to technical limitations in how pages are calculated in Scrivener rather than something that can be easily quantified as you type in snippets of text here, there and everywhere throughout the binder or draft folder. This is why session counts cannot be calculated by page either.



**Target for this document** Sets the goal for the current document, as either words or character counts. If you select a different unit of measurement than what is being displayed in the footer bar, no x/y information will be shown, but the progress bar will still show your relative progress.<sup>6</sup>

**Minimum target** This alternate mode of usage will draw a small indicator on the progress bar at the declared minimum, and until you reach that point the progress bar will use the **Overflow Color** (red), switching to the **Start Color** (blue) as soon as you reach your minimum goal.<sup>7</sup>

**Show overrun** With this enabled, instead of the progress bar merely switching to the **End Color** (green) once you exceed the goal, it will start filling up again from the left, this time using the **Overflow Color**, thus indicating the relative amount of text in excess of the goal. This can also be a useful editing tool for trimming down the word count.

**Overrun allowance** Rather than going into overrun mode immediately, this sets a threshold before the warning bar kicks in. For example if you set a goal of 600 and an overrun allowance of 50, the bar will remain green from 600 to 650, but as soon as you hit 651 the overrun state will kick in.

**Show allowance in progress bar** If an overrun allowance has been set, a tick will be added to the visual progress bar that marks the actual target of the document, with the remainder of the progress bar showing how far you can continue writing before going into the red. As you write into this threshold, it will fill up until the document goal plus the overrun allowance has been exceeded.

**Show target notifications** Show notifications when you reach different states in your progress. The various options above all add additional notification states. With everything enabled, you will be alerted when you reach your minimum goal, when you reach the overall goal, when you go *over* your goal—and then all in reverse as well as you edit back down through the different stages.

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<sup>6</sup> You can change the footer bar to show the stats relevant to your work, with the **Live counts show** option in the Editing: Options settings pane ([subsection B.3.1](#)).

<sup>7</sup> These progress bar colours can be changed in the Appearance: Targets: Colors settings pane ([subsection B.5.15](#)).

**Need a bigger picture?**

You may also monitor and set goals using the Outliner, by revealing the “Target”, “Target Type”, and/or “Progress” columns, with the “Total Goal” and “Total Progress” columns showing an aggregated goal count and total progress by level, adding up all child items. In this way, you can easily work toward chapter or other larger section goals, while still maintaining a fine-grained approach to cutting up the section into smaller pieces.

To disable goals for a document, enter a value of “o” into the **Target for this document** field for the document.

## Tracking Goals for Groups

When using Scrivenings mode, a progress bar will show the sum of all goals set by individual documents within the session. The progress bar then becomes a “total progress” tracker, adding all of the goals and various settings together and using the grand total in the editor against that goal.

Another way of making use of this capability is to set a single goal on the group that contains the files as a whole. For example if you load the chapter folder itself into the text editor you can set a goal for the entire chapter and not worry about having to set individual goals for each section of text within the chapter. Now when using Scrivenings mode on the chapter, you will be provided with a sensible goal with all of the constituent parts of the chapter.

### 20.1.3 Statistics

Project and text statistics can be called up at any time with the **Project ▶ Statistics...** menu command (⇧⌘⌥S). This pane has two info tabs and some options:

1. *Compiled*: this will list statistics for a total reckoning of all documents in the Draft, modified by any compile filters that have been applied to it ([section 23.4.1](#)). By default, this does *not* include setting the compile group to only a subset of the Draft. Thus you may compile one chapter for proofing while still using this tool to keep track of the larger work.
2. *Selection*: a count of those documents you have selected in the binder or any group view, including the current and active Scrivenings session. This accounting by default also includes subdocuments of the selected items.

### Upgrading from Scrivener 2

Looking for “Text Statistics” pane from previous versions of Scrivener? The “Project Statistics” and “Text Statistics” panes have been combined into a single feature, **Project ▶ Statistics...** (⇧⌘⌥S), with two tabs. The latter now has every feature the former once had exclusively, and vice versa. To get statistics on a single text document, view it in the editor alone and then use the “Selected Documents” tab. You can click on statistics in the footer bar of the editor and get much of the same information provided here.

Each of these sections have identical statistics available to them, most of which are self-explanatory and will not be documented here:

- *Documents*: lists the total number of binder items being used to generate the statistics. This includes items that are not contributing to the count, such as empty files.
- *Pages (Paperback)*: this is an estimate, using an industry standard formula (for English language publishing) of taking the average number of words per page and multiplying it by the average number of characters per word (five including a space, for six total), the product of which is then used to divide against the total character count of the project. By example, a book with 714,000 characters with an estimate set to 350 words per page will produce a result of:

$$\frac{714000}{(350 \times 6)} = 340$$

pages.

Options for tweaking the algorithm are located in the “Options” tab, under **Page count options**.

- *Pages Printed*: this counter will be more accurate as it will compile your draft in the background, using the specified formatting and other content settings, and then count the total pages resulting from that. It requires the accuracy model be set to “Accurate (Slower)”, as described below.
- *Reading Time*: this is a simple calculation based on an average 250 words per minute.

The **Word frequency** section at the bottom will provide a complete concordance of every word found within the relevant texts being counted, along with how often the word has been used. By default the list is sorted alphabetically, but by clicking in the column headers you can sort by “Count” in ascending or

descending order.<sup>8</sup> Words from this chart can be selected (using **Cmd** and **Shift** clicking to select individual words and ranges of words, respectively; **⌘A** will select all) and copied and pasted as tab-delineated text, suitable for use in a spreadsheet for more thorough analysis.

At very the bottom of the pane, alongside the **OK** button, is a dropdown that selects between two different accuracy models. Accuracy pertains to how all statistics are gathered:

- *Accurate (Slower)*: to accurately count all relevant text, and particularly to paginate properly, Scrivener must internally generate a compile document based upon your compile settings. In large projects, the panel will automatically switch to Estimate, to avoid long waits when checking statistics.
- *Estimated (Fast)*: this model uses the fast internal search index to count the relevant text. This means all alterations made to the text during the compile process will be disregarded, and a true page count will be unknown, but in larger projects this will be the only viable option, and is thus the default setting.

## Project Statistics Options

To access options for how project and selection statistics are calculated, click the “Options” tab in the window. The first group of settings, under the “Compiled Statistics Options” heading, impact how the statistics in the first tab of this pane are calculated:

**Count current compile group only** Only calculates from documents that have been selected via the compile group dropdown in the Content pane of the Compile interface. This is the only compile-time option that can be disabled. All other compile options that restrict or modify output quantity will still be factored into the count.

**Count footnotes** Footnotes are by default included in the count. If your publishing environment demands these be considered separate, here is where you can disable them in the total count.

The second group of options, “Selection Statistics Options”, impact how statistics for the second tab in this pane are calculated:

**Count all documents** In this context, “all documents” refers to whether the inspector option, “Include in Compile” should be ignored.

**Count only documents marked for inclusion** Only those documents that have “Include in Compile” checked will be counted.

---

<sup>8</sup> You can technically sort by “Frequency” as well, but this will provide an identical list as sorting by “Count”.

**Count only documents not marked for inclusion** As above, only with the inverse logic.

**Exclude comments and annotations** The running commentary for a piece, its inline annotations and comments, will be counted by default. Check this box to only count text that would generally be exported or printed.

**Exclude footnotes** Footnotes are by default included in the count.

**Count subdocuments** By default the selected items *and* all of their children will be counted, all the way down to the bottom of the outline. When disabled, only the explicit selection will be counted.

The remainder of the settings impact both statistics tabs.

**Page Count Options** Set the counting algorithm used to estimate paperback page counting. The default presumes a “word” to be an average of five letters long plus a space, for six characters total—thus by default per page:

$$350 \times 6 = 2100$$

per page. This is a fairly safe estimate (and an industry standard) in English publishing.

If you’re writing in a language where word length differs substantially, it might be better to switch this to “characters per page” mode so you can more directly fine-tune its result.

**Word Frequency Options** This is a global option for all projects. Click the **Set List of Words to Ignore...** button to bring up a text field where you can insert words that the word usage frequency tables should leave out. In English for example, it could be useful to leave out common articles such as “a”, “the”, “at” and so forth.

## 20.1.4 Writing History

This feature, accessed via the **Project ▶ Writing History...** menu command, offers a thorough reckoning of the daily word count progression (or trimming, as the case may be) on a daily, monthly or combined basis. Even if you do not make use of the session tracking feature, Scrivener will dutifully record your net increase or decrease in word and character counts (both in and out of the draft folder) on a daily basis. This information is then used to provide monthly summaries and produce overall averages.

As this tool is designed to track your writing activity, it will follow the same rules for considering what “writing activity” constitutes, as described in Project Targets ([subsection 20.1.1](#)). While both tools work similarly, writing history does not record the session tool itself. Resetting the session, or selecting options for how it works, will by and large have no impact on the overall writing history.

The top portion of the pane features these overall statistics:

- *Writing days*: the total number of days in which the project was opened and some change as made to the count—even if only to add or delete one word.
- *Average words written per day*: is broken down by those words written in the “Draft” vs everywhere else, and a total of these two.<sup>9</sup>

The central and largest portion of this window displays detailed statistics to a resolution determined by the dropdown setting in the upper right-hand corner (set to “Months and Days” by default):

- *Months and Days*: all recorded information will be shown, with each day you have written grouped together into monthly sections. The monthly rows will contain a sum of all the day counts within them.
- *Months Only*: only the monthly summary rows will be displayed. If you’ve been working on a project for a long time, it might be more useful to see the bigger picture this mode affords.
- *Days Only*: if it doesn’t really matter how many words you write in a month, use this mode to display a simple list of every day committed to the project.

The list will be sorted in reverse-chronological order by default. You can click on any of the column headers to sort by a different value. You could for example click on the Total column to see which days or months of the year were your weakest and which were the strongest. Negative numbers indicate that on that day you cut more words than you wrote.

The individual rows in this table can be selected, and when doing so some calculations will be performed for you, displayed in the area below. This information will be identical in format to the overall summaries provided at the top of the window, only focusing specifically on the month or day you’ve selected in the list, plus a few extras:

- When selecting a day, if a session target was set for that day it will be recorded.
- When selecting a month, the number of days you wrote in that month will be printed under “Writing days”. In addition to the monthly summation, you can choose to view:
  - *Average per day*: your averages within the confines of that month.

---

<sup>9</sup> For the purposes of this calculation, the Draft counter will only count words written into documents included in the draft, also found within the Draft folder. Excluded documents will count as “Other”.

- *Minimum in a day*: the count for the lowest session count (by total) that month.
- *Maximum in a day*: the count for the greatest number of words written (by total) in a session during that month.
- The total draft amount for each day will also be printed in the information area below the table.<sup>10</sup>

Lastly, the **Export...** button brings you to a save panel, where you can dump the full writing history to a csv file, suitable for further analysis in a spreadsheet program or similar. There are a few options available for how this file should be formatted.

- You can choose to “export days” or “export months”, to set the granularity of the data.
- Select which columns should be exported. While ordinarily you can only view statistics in Scrivener as either words or characters, with the raw output you can export both types of data.

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## 20.2 Auto-Completion

There are three forms of correction and auto-completion in Scrivener:

**Character substitution** Adjustments made to the characters as you type them in, such as setting keyboard quotes to typographer’s “curly” or “smart” quotes, as they are alternatively called, or adjusting stand-alone i’s at the start of a sentence to capital form.

**Word and phrase completion** As you type, you can have Scrivener suggest words for you either automatically, or with a shortcut (the default); custom phrases can be added to each project, such as proper nouns or frequently used scientific terms. Separate from the project phrase list, you can also auto-complete based on existing title names from the binder.

**Scriptwriting abbreviations** Scriptwriting abbreviations, such as “EXT.” or “V.O.”, can be suggested as you type. These are defined in the script formatting definitions **Format ▶ Scriptwriting ▶ Script Settings...**, but the settings in this area can also instruct the software on how to automatically gather new terms into the project auto-complete list. For example every time you

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<sup>10</sup> Added in version 3.1, older entries in your projects will of course lack any record of the total draft count.



type in a new character name it will be remembered and suggested when typing into a Character element in the future.

### 20.2.1 Character Substitutions

With character substitutions, you can set which characters will be replaced as you type. Scrivener uses a combination of built-in enhancements, plus macOS' built-in substitution engine. Most of these can be set in the Corrections settings pane ([section B.6](#)).

These adjustments always happen automatically as you type, but some require you to terminate the word you are typing in, before they will take action.

### 20.2.2 Custom Auto-completion

Completions can be requested by typing in a little bit of the word and then using the keyboard shortcut, `⌘Esc`, to trigger the **Edit ▶ Completions ▶ Complete** menu command. If you would prefer Scrivener present completions automatically as you type, set the **Suggest completions as you type** option and make sure **In script mode only** is disabled, in the Corrections settings pane ([section B.6](#)).

Each project has its own custom auto-completion list. There are two ways to add items to this list:

1. Beforehand: with the **Project ▶ Project Settings...** command (`⌘⌘,`), use the Project Settings: Auto-Complete list pane ([section C.6](#)) to manage the list of terms in your project.
2. As you write: select the word or phrase you want to add and use the **Edit ▶ Completions ▶ Add Selection to Auto-Complete List** menu command; also available from the right-click contextual menu. If you are using scriptwriting mode, some elements will automatically capture what you type into the auto-complete list, such as character names and locations.

#### Copying completions between projects

To transfer completion lists from one project to another: open both projects simultaneously, access their respective auto-complete lists, and drag and drop the terms from one panel to another.

### 20.2.3 Binder Title Completion

If you have started typing in the name of a title that is found in your binder, you can request a list of completions from Scrivener by pressing a different shortcut, `⌘Esc`, or by using the **Edit ▶ Completions ▶ Complete Document Title** menu command. A list of all the titles that start with what you have typed in so far will be

presented.<sup>11</sup> You can use the arrow keys to select an item and press **Return** or **Tab** to insert the full title, or continue typing in letters to further narrow down the list.

### Creating Linked Titles

This feature is particularly useful in conjunction with the “wiki style” document link option. Type in “[[”, start typing in the title name, hit the shortcut, select a title, and then close with “]]”. A document link will be automatically created for you. Another approach, if you aren’t positive of the precise title, is to use the Quick Search tool (use `^⌘G` to get the cursor there), type in any part of a document’s name until you have it in the list then drag it from the search result list into your text editor.

## 20.2.4 Scriptwriting Auto-Completion

Scriptwriting mode, by default, engages a more aggressive auto-completion method that scans as you type and looks for completions, matching the behaviour of most scriptwriting programs on the market. Most of the script formats that are shipped with Scrivener come stocked with many common phrases and abbreviations, which will be contextually suggested within the element you are currently typing within. For example, “MOMENTS LATER” will appear whilst typing in a Scene Heading element, but will not appear in a Dialogue element.

Most script formatting settings will also automatically add anything typed into certain key areas of some elements into the project’s master auto-completion list. Character names, locations, and so on will be checked for and added, making rote data entry more efficient as you write.

Since auto-completion cannot reliably determine appropriate letter case, sometimes it may produce results that are undesirable, such as a mixed case location name in a slugline. To remedy this, when selecting the auto-completion you wish to use, hold down the Shift key. Any word or phrase selected with the Shift key held down will complete using uppercase letters.

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## 20.3 Proofreading Tools

Scrivener has a few tools available to make the process of proofreading your work a little easier. Whether you prefer to generate a static copy of your text, so that it can be read in a different context than where you write, or if you prefer to

<sup>11</sup> Only text up to the first space will be considered, so you must select a completion within the first word of the title alone.

proofread and edit directly in the same text editor you use to write, we have a few tools that can help.

### 20.3.1 Cleaning the Editor View

Being able to proofread and edit in the same environment is convenient, but depending on how you work, you may find some of the tools Scrivener uses to aid in the writing process to be a distraction. There are rulers and toolbars, hyperlinks in the text, comments, style markers and so on.

1. Firstly, the traditional and longstanding tool available for paring down the interface is Composition Mode ([section 16.1](#)). With a simple command you can be whisked away into an environment where all you see by default is your text, not even the rest of the computer that is typically around your project window.
2. For some that may be too much however. After all split views are a fantastic editing tool. Being able to compare older revisions via snapshots with the current text, jumping around using all of the navigation tools the main project window affords you is too much to give up. You could consider using the built-in “Editor Only” layout, with the **Window ▸ Layouts ▸ Editor Only** menu command (or from the “Layouts” sub-menu of the View button on the toolbar. This removes the inspector and binder, and reduces your layout to one simple editor (the active one at the time of invoking this command). You can further hide the Format Bar and main application toolbar for an even cleaner interface.
3. Proofing and editing can often be aided by blocking out as much of the text on the screen as possible. The Focus feature, which fades all text save for the context around the cursor. Read more about Focus Mode ([section 16.4](#)).
4. Now for the text itself, the **View ▸ Text Editing ▸ Hide Markup** menu command will by default hide the following elements:<sup>12</sup>
  - Comment highlights
  - Footnote highlights
  - Highlight boxes around styled text
  - Preserve Formatting markup

The scope of what it hides can be configured in the Appearance: Textual Marks: Options Setting tab. Caution should be taken in being aware that

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<sup>12</sup> No, this feature doesn’t have anything to do with the sort of markup you type in yourself, such as with Markdown.

these markings will merely be hidden. They will go on being functional despite your being unable to see them, and typing in and around them will follow all of the same rules that would apply if they were visible. For example, if you put your cursor at the end of a styled phrase that is only indicated as being styled by its highlight box, and proceed to type several hundred words, all of those words will be assigned to that style unbeknownst—until you toggle markup back on.

## 20.3.2 Linguistic Focus

The Linguistic Focus panel can be brought up with the **Edit ▶ Spelling and Grammar ▶ Linguistic Focus...** menu command (**⌘L**). This tool will fade out the text in the main editor, leaving only the selected part of speech highlighted. In this way you can highlight all adjectives, adverbs, pronouns or whatever else you wish to focus on, and freely edit the text while in this focused state.

Adjust the amount of fade used to dim out unmatched text with the **Fade** slider, at the bottom of the Linguistic Focus panel.

For performance reasons, all edits will remain fully visible, rather than being evaluated for their parts of speech while you write. To update the display with your newly added text, click the circular arrow button in the lower right corner to refresh the filter.

The “Direct Speech” option will attempt to find and highlight any text found within quote marks. The marking punctuation used will match those selected as smart quotes, in the System Settings: Keyboard pane, by clicking the Edit button alongside your input sources.<sup>13</sup> If you make use of a marking system that denotes dialogue with an em-dash at the beginning of the paragraph, you will need to enable **Linguistic focus uses Spanish-style dialogue**, in the General: Language settings pane ([subsection B.2.5](#)).

When you are done analysing your text, close the panel to return the editor to its normal display.

## 20.3.3 Inserting Section Links Into Proofing Copies

For those that prefer a “hard copy” (even if entirely dealt with digitally), you can have the compiler insert a link pointing back to every section of the binder that was used to compose that copy. If for example you are proofing chapter 18 and it is comprised of 30 some subdocuments, this option would insert 30 hyperlinks into the compiled file, each pointing back to the specific chunk of text following the link. Here is a simple way to test the feature and see if it is right for you:

- I. Use the **File ▶ Compile...** menu command.

---

<sup>13</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.

2. Click on the General Options compile settings tab ([subsection 23.4.3](#)) (gear button).
3. Enable the **Insert links back to Scrivener in each section** checkbox.
4. With **Compile for** “PDF” set at the very top of the compile pane, click the **Compile** button and select a convenient location to save the proof copy.
5. Once compile completes, split the editor using **View ▶ Editor Layout ▶ Split Vertically** (or use whichever method you prefer).
6. Drag the proofing PDF into either editor’s header bar to load it directly into the split (no need to import it first!).
7. Now you can proofread the “hard copy” in one split, and if you spot an error, click the “Open in Scrivener” link located at the top of the section you’re currently reading within.

With default settings you will find the section loads in the other split.

That is of course only one way in which to use these links. You do not have to use PDF, nor do you have to load the file into a split—these links work from anywhere on the same machine—so feel free to use your favourite PDF reader, or an ebook reading program with ePub, a web browser with HTML files, a word processor, Markdown previewer, etc.

This method can be used too distribute proofing copies to readers. When importing their annotated copy of the draft back into your binder, you’ll be able to jump directly to the section their notes pertain to via these links.

In some case you might need to use a format that doesn’t support hyperlinks (such as various plain-text formats), or you may find that the special hyperlinks Scrivener inserts are being damaged by whatever software your proofers are using. In that case, the **Insert unique document identifiers only** option (directly below the aforementioned compile setting in step 3) will insert a plain-text marker that Scrivener will scan for and convert back into a document link when the file is imported into the binder. You will need to communicate the importance of these markers to your proofers, so that they can work around them.

### 20.3.4 Converting Document Links to External Links

In a similar vein, you can have *all* document links in the text converted to external links. When clicking on the link it will load that section of text in your original project. This options allows you to carry over your internal link usage to proofing copies, though of course since it relies upon the original project being where it was when you compiled, the method will likely not work once you take the proofing copy off of the original computer.

E.g. a cross-reference from a scene in chapter 8 pointing to a character sheet elsewhere in your binder will be retained (ordinarily links to items not found in

the draft itself would be removed from the output), and clicking the link will load that character sheet in your project.

To enable such links:

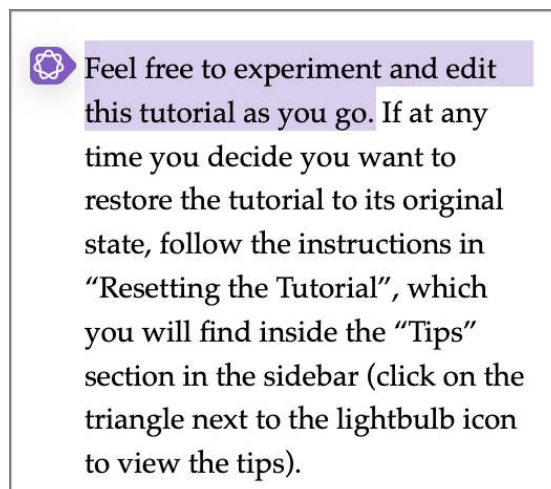
1. Use the **File ▶ Compile...** menu command.
2. Select PDF or one of the word processing formats.
3. Click on the General Options compile settings tab ([subsection 23.4.3](#)) (gear button).
4. Enable the **Convert document links to link back to Scrivener** checkbox.
5. Click the **Compile** button and load the file in your preferred editing or reading program.

### 20.3.5 Editing with Apple's AI Tools

**<macOS 15.1+>** Selected text from anywhere within the project window, Scratchpad or Quick Reference panels, can be submitted to Apple Intelligence's "Writing Tools" feature, on supported systems, where it has been enabled on the Mac.

1. Select the text you would like to submit for analysis.
2. Use the **Edit ▶ Writing Tools ▶** submenu to select a tool, or use the main "Show Writing Tools" entry at the top to open the interactive interface. (This menu is also available in the contextual menu.)

You will be presented with a preview of the modified text, and from there you can have it overwrite the original text, or copy it for further editing elsewhere.



**Figure 20.3** Click on the "bug" to bring up the Writing Tools.

If you pause over a selection of text, the OS may place a "bug" to the left of the text that you can click on ([Figure 20.3](#)) that will also bring up the main Writing Tools interface.

When selecting text from a Scrivenings session, that includes text from more than one binder item, the ability to overwrite the original will fail for the same reason you cannot edit such selections yourself. Use the Copy button to paste the text somewhere temporary, and integrate the edits by hand.

Refer to [Apple's online documentation](#) for further instruction on the various tools available for text analysis.

### Are my writings being sent to AI servers?

Scrivener itself contains no “AI”, nor does it passively do anything with your text that would cause it to be sent anywhere from your machine to another server (at all). If you elect to enable Apple Intelligence on your system, then further choose to have it work with selected portions of your text, and are concerned with how Apple use that data, you will need to consult their privacy statements on the matter. Scrivener merely acts as a host for these services on your Mac, in a similar fashion to how it allows the spell check engine to work on your text. If any of this makes you uneasy, the simplest approach is to disable Apple Intelligence in System Settings: Apple Intelligence & Siri panel. Apple's privacy notices, policies and further documentation can all be accessed via a link at the top of this panel.

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## 20.4 The Name Generator

Scrivener comes with a simple name generator that includes many thousands of common names, as well as selections such as dictionary words that sounds like names, literary names from classics. Its proper name lists include a broad selection of regional names in several languages. It also includes a number of features for selecting the types of names you will see generated.

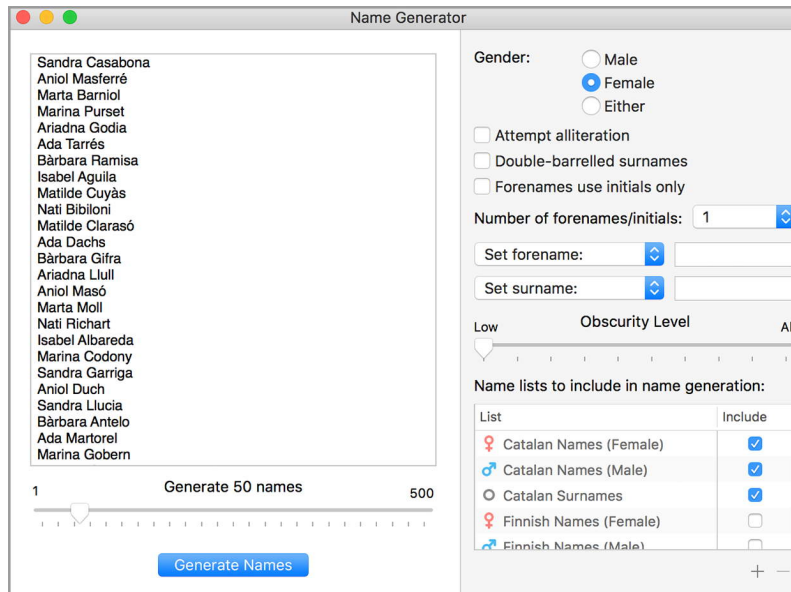
To bring up the name generator use the **Edit ▶ Reference Tools ▶ Name Generator...** menu command and click the **Generate Names** button to get started. The left side of this window is a text list (empty initially) where the names will be generated. You can select and copy names out of this list to store your favourites. You can also right-click on selected names to run quick searches for them on the Web, to check for existing uses of them.

On the left side of the window you will find options for adjusting how names are generated:

**Gender** Select one option here. The default is either gender.

**Attempt alliteration** The generator will attempt to produce names with an alliterative effect, like “Jeromy Jin”. This option will work best with Latin based languages.





**Figure 20.4** The name generator: for when Joe Sixpack needs an upgrade.

**Double-barrelled surnames** Produces names like, “Otis Cowie-Milburn”.

**Forenames use initials only** Reduces the forename to an initial. If more than one forename has been selected in the option below, multiple initials will be generated, like, “N. J. Pettersen”.

**Number of forenames/initials** Produces multiple forenames. You can select from 1 (default) to 3.

**Set or search forename and surname** The next two fields are multi-purpose tools where you can either set part of the name yourself, or search the database for a name by providing a part of it. For each part of the name:

- Set: forces the respective name to be what you type into the text field; useful if you already have a name in mind but are having troubles with the rest of it.
- Starts with: will only return names from the database that start with the characters you type into the field.
- Ends with: likewise, but for characters at the end of the name.
- Contains: the characters need only be found anywhere within the name.

**Obscurity Level** This slider adjusts how obscure the names should be on average. Moving the slider all the way to the left might produce a result like, “Scott Young”, while sliding it all the way to the right, “Chauncey Noach” (no offence to all the Chaunceys out there).

The bottom of the configuration area is where you will select from the many lists provided as sources for the name generator. You can have as many lists active at once as you like, but you will always need at least one Surname list selected (indicated by the neutral grey circle icon), and at least one gender list which is compatible with the gender option set above.

### 20.4.1 Managing Your Own Name Lists

You can add your own custom name lists to the generator. They should be formatted so that all names are on a single line, and each name is separated by a comma, like so:

name1,name2,name3,name4,name5,...

1. It might be easiest to produce these lists in a spreadsheet on a single row, and export as a csv file. If you use a regular text editor, make sure to save as plain text, and name the file with a “.csv” extension.
2. Click the **+** button, below the name list area of the Name Generator window.
3. Locate the file in the chooser dialogue and click **Open**.
4. Give the list a descriptive name in the **Title** field, and select whether it is a list of female names, male names, or surnames.
5. Finally, if you have ordered your list from most common to most obscure (at the end of the list), check this box to enable the Obscurity Level slider for that list.<sup>14</sup>

To delete one of your custom lists: select it from the name list area and click the **–** button. You will be asked to confirm your decision.

To update a list you’ve imported in the past, delete the custom list, and then add your modified csv file again.

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## 20.5 Bibliography Management

Scrivener offers simple integration with your favourite bibliography or citation manager (such as EndNote, Bookends, Sente or Zotero) for academic work. To set it up:

1. Open the General: Citations settings pane ([subsection B.2.8](#)).

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<sup>14</sup> In small lists, the obscurity slider may not have much impact, depending upon how many names are being generated.

2. Click on the **Choose...** button and use the file chooser to locate the application you use for citation management.

With the citation manager set up, use the **Insert ▶ Bibliography/Citations...** menu command (⌘Y) to bring your chosen software to the front, launching it automatically if necessary.

The steps you take next will depend upon your citation manager, so you will need to consult their documentation on how to use their software with third-party word processors. Typically, you would copy and paste a citation placeholder into Scrivener, in the location where the reference mark should appear. After compiling to RTF, you would then use the citation manager to scan these placeholders into final print form. Not every program or service provides RTF scanning, however. You should research the software you intend to use and make certain it designed to work with software other than Microsoft Word.

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## 20.6 Using Equations with MathType

⟨**macOS 10.13–14**⟩ If part of your writing involves the addition or construction of equations, one alternative is to make use of Scrivener’s **MathType** integration to insert editable equation objects into the draft, much like you would an ordinary figure. As MathType is a 32-bit application, this integration is only available on older systems.

To create a new equation, position your cursor where you wish to have it appear, and use **Insert ▶ MathType Equation**.<sup>15</sup> If you have MathType correctly installed on your machine, you will see the equation entry window pop up over the Scrivener window. Any changes made within this window will be saved back into the Scrivener project when you close the window (by default it will ask for confirmation when closing the window) or use **File ▶ Close and Return to Scrivener**.

Equations can be inserted either on their own lines, as figures, or directly inline within a paragraph. In the latter case, attempts will be made to keep the equation correctly aligned with the text baseline.

To edit an equation double-click on the equation in the Scrivener editor. The MathType interface will pop up again, this time with the equation loaded, and any changes you make will be saved back into the file when you close it.

Otherwise, equations act much like ordinary images. They can be aligned or have paragraph formatting (such as spacing) applied in the editor, and when they are compiled they will be converted to images and handled as they ordinarily would be for the particular format in use.

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<sup>15</sup> You can also add an optional “Equation” button to the main application toolbar if you use this feature a lot.

**Using MathType equations beyond Scrivener**

Given unfortunate technical limitations in how the MathType engine handles equations in export, when compiling a document containing them, they will be converted to raster images at that time. This means they will not be scalable without quality loss and can no longer be edited. They are thus not suitable for round-trip workflows where one imports edited documents from collaborators, or for taking your work into other word processors for additional formatting with the equations in an editable form. If you require equations to be editable throughout the life of the document then it would be best to defer the insertion of equations until they can be brought into an environment where they will remain until publication, or to use another technology, such as LaTeX.

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# Using MultiMarkdown and Pandoc

21

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For those who prefer structural or semantic writing methods to rich text, Scrivener allows you to import and export using two different Markdown dialects: Fletcher T. Penney’s MultiMarkdown (MMD) and John MacFarlane’s Pandoc. These systems make it easy to generate documents in any number of formats, from clean and modern HTML5 to LaTeX to DocBook to standard word processing files like Word’s DOCX or ODT—all while using a simple and easy to type in markup.

If you are curious about the process and would like to consider adopting it, you should read the following sections for an overview of its philosophy, limitations and capabilities. If you’re already familiar with Markdown, you may prefer to skip to Markdown and Scrivener ([section 2I.4](#)), where we get into the specifics of how these tools can be used within, and are supported by, the software.

## 21.1 What is Markdown?

“Markdown” is an easy to learn syntax created by John Gruber; a good description of what Markdown is comes from his site, [Daring Fireball](#):

Markdown is a text-to-HTML conversion tool for web writers. Markdown allows you to write using an easy-to-read, easy-to-write plain text format, then convert it to structurally valid XHTML (or HTML).

Thus, “Markdown” is two things: (1) a plain text formatting syntax; and (2) a software tool, written in Perl, that converts the plain text formatting to HTML. See the Syntax page for details pertaining to Markdown’s formatting syntax. You can try it out, right now, using the online Dingus.

The overriding design goal for Markdown’s formatting syntax is to make it as readable as possible. The idea is that a Markdown-formatted document should be publishable as-is, as plain text, without looking like it’s been marked up with tags or formatting instructions. While Markdown’s syntax has been influenced by several existing text-to-HTML filters, the single biggest source of inspiration for Markdown’s syntax is the format of plain text email.

### Can I use Scrivener to create basic Markdown?

You may not need all of the frills provided by the integrated systems, or are publishing to a system that has its own dialect, such as Github. In most cases, the Markdown that Scrivener generates is done at your request: it will only generate image syntax if you put images in the editor for example. If the dialect you are using does not use footnote syntax, then you should avoid using the footnote feature in Scrivener. A common need is to remove the special document metadata features that both MMD and Pandoc make use of ([section 21.6](#)).

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## 21.2 What are MultiMarkdown and Pandoc?

Markdown’s goal is primarily toward Web publishing and similar uses. Systems like [MultiMarkdown](#) and [Pandoc](#) arose out of a desire to use a similarly simple syntax for the production of formats more suitable to traditional and electronic publishing. The syntax was extended to include constructions desirable to authors, such as footnotes, tables and better cross-referencing. Of the many formats these systems provide, Scrivener supports:



- $\text{\LaTeX}$  via MultiMarkdown: a well established document typesetting engine primarily used in the sciences and academia for its high-quality rendering of formulae. Beyond that it is a capable engine for any number of purposes, especially technical formats. In fact, the PDF you're reading right now was built using this system.
- HTML5 via MMD: is capable of producing syntactically clean, modern HTML. It is suitable for the production of ebooks and web pages—in fact we drive our own ebook generator using MMD's output, after internally converting Scrivener's rich text to MMD syntax.
- ODT via MMD: The OpenDocument format can be opened by many word processors and office suites (OpenOffice and LibreOffice being the two most popular). From there it can be converted to any format you need. This is a high quality word processing document, with figure captions, stylesheets and everything else you'd need to take your work into a production environment.
- DOCX via Pandoc: this high-quality word processing output is better if you know Word is the primary target. This will be the ideal format to use if you need to continue your project beyond Scrivener in a traditional word processing environment.
- DocBook via Pandoc: this format is sometimes used in technical publishing.
- ePub via Pandoc: capable of producing both ePub version 2 and 3 formats. As can be expected from generators based on Markdown, the internal HTML quality is clean and easy to modify and style.

One of the things that attracts people to Markdown is that it focusses solely upon the structural aspects of a text. Formatting is not something one can bother with, instead text is marked as being a “kind of thing” using simple to type and easy-to-read text markers. Scrivener's approach to working with Markdown is thoroughly in line with that ethos. You will find ways to insert CSS, LaTeX preamble and other ways to influence formatting, but Scrivener itself will chiefly avoid formatting and focus purely on generating the Markdown syntax itself.

This chapter will not attempt to teach you Markdown or any of the more advanced dialects of it. There are excellent resources available on the Internet for this, including the links at the top of this section. Instead we will cover the integration itself, and will assume a basic working knowledge of the underlying markup systems.

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## 21.3 Getting Started with the Tools

⟨Direct-sale only⟩ There is very little you need to do to prepare for using MultiMarkdown with Scrivener. It comes pre-loaded with a recent version of it, including some of its support files for creating ready-to typeset  $\text{\LaTeX}$  documents. You are of course free to install your own version of MMD, and Scrivener will cross-check your system for you. If it detects installed components, it will gracefully switch to using them behind the scenes.<sup>1</sup>

For Pandoc support, you will need to install your own copy of the engine itself. Refer to Setting up MultiMarkdown or Pandoc ([subsection 3.3.3](#)).

⟨MAS only⟩ The version sold through Apple’s store must adhere to Apple’s sandboxing guidelines, which means no utilities can be executed unless they are located inside the /Applications folder. Thus the Apple version of Scrivener cannot integrate with Pandoc, pdf $\text{\LaTeX}$ , support external support files or a custom MultiMarkdown installation. It only supports the built-in distribution of MultiMarkdown.

If such customisations are important ingredients in how you intend to use Scrivener, you are advised to either purchase the direct-sale version instead, or if you’ve already bought and run the Apple version, you may be able to migrate to the direct-sale version by downloading it from our site and replacing your MAS copy. Further instructions are provided [in our knowledge base](#).

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## 21.4 Markdown and Scrivener

Scrivener’s support of this writing method is built with three different approaches in mind:

- I. *Purist*: those that enjoy using the format itself and plan to not make much use of Scrivener’s rich text editing features—or intend to use those in an editorial fashion rather than for the purposes of formatting.
  - Using this method, you would treat Scrivener like a plain-text editor with benefits: you get things like inline highlights, revision modes, annotations, comments and other affordances uncommon in plain-text editors.
  - This is a good approach to take if you prefer writing or editing in plain-text editors, as you can freely rotate text out and back into the Scrivener editor without fear of losing functional formatting.

---

<sup>1</sup> Recent versions of MultiMarkdown, which are embedded in Scrivener, are not compatible with macOS 10.13. You will need to [install your own copy](#) in order to regain access to the conversion options in the compiler.

2. *Hybrid*: those that intend to blend various rich-text oriented tools—with the intention of having them converted to Markdown syntax during compile—with standard typed-in Markdown.
  - Scrivener’s powerful stylesheet system is a natural augment to Markdown style writing ([subsection 21.4.8](#)).
  - In addition to styles, Scrivener can handle numerous tasks that are otherwise labour intensive, such as: heading hashes by level, footnote markings, table generation, simple lists, cross-reference & general hyperlinking and image handling.
  - The syntax that Scrivener generates is *additive* to the document you key in yourself. What you type will not be changed, but objects like images will be added to it as you use these features.
3. *Incidental*: those that really aren’t interested in using Markdown at all, but would like to take advantage of some of the higher quality or exclusive formats it provides.
  - Select any Markdown-based file type and enable the **Convert rich text to MultiMarkdown** option in the compile overview’s General Options tab ([subsection 23.4.3](#)).
  - All of the conversion options described in this chapter, unless otherwise noted, will be handled automatically for you. As much as Scrivener is able to do so, your rich text source material will be converted to MultiMarkdown or Pandoc syntax.
  - For those that require an amount of Markdown syntax in their work, such as the use of citation markings, there are multiple options for doing so ([subsection 21.4.9](#)).

With any of the above methods, most forms of rich text formatting will be ignored, by virtue of being exported into a plain-text workflow. Furthermore, many types of formatting, such as highlighting, typographic adjustments, the specifics of paragraph formatting and so forth, have no equivalents in Markdown-based systems. For the remainder of this chapter, we will focus on precisely what Scrivener *does* address, as well as what tools can be used to extend into areas where it does not.

For the most part you will be using Scrivener like everyone else does. It is fundamentally a rich text editor, and as such many of the tools you would use to affect varying degrees of a hybrid approach will simply be what everyone else uses.

### 21.4.1 Importing Markdown Files

You can import any existing Markdown documents into Scrivener using the typical methods for importing files—they are simply text files and so there is really nothing special required to get that text into Scrivener.

But if you would like to have the document split by headings instead of as one long file, use the **File ▶ Import ▶ Import and Split...** menu command. This command can break up the document so that it is imported into the binder with its heading hierarchy converted to nested documents in the binder. Refer to the Import and Split documentation for further details ([section 9.1.6](#)).<sup>2</sup>

When importing a document with a MultiMarkdown or **YAML** metadata block via Import and Split, Scrivener will create a file containing just the metadata, at the top of the list. The compiler is designed to integrate any metadata found in such a file automatically, so you may just be able to leave it alone ([section 21.7](#)). But, if you wish to move these values to the compiler, or indeed if you wish to move any set of properly formatting metadata values into the compiler, you can simply copy and paste into the compile pane metadata table.

### 21.4.2 Images

As shown in [Figure 21.1](#), placing an image in the editor (using any of the methods Scrivener provides for doing so ([section 15.6](#))) is a simple way of generating Markdown image syntax when compiling. What you cannot see from the screenshot itself is that the compiler also produced the image itself into a folder, such that the reference to “bair\_island-wetlands.jpg” would link up and be available for any further post-processing. Image syntax has the following characteristics:

- An image identifier is created using its original file name (in the example, “barisland-wetlands”). Knowing that, you can cross-reference to this image using the MultiMarkdown or Pandoc syntax for doing so.
- The *effective size* of the image will be provided in points, rather than using its raw physical pixel dimensions. This will produce a result in keeping with its original print resolution, and allow one to supply high-resolution graphics in their ebooks and Web pages.

### Referencing Images with Document Links

There may be cases where you might *not* want the image to be in the editor, or maybe you prefer using text syntax to refer to images rather than working around them as visual objects in your text—but you would still like to take advantage of the automation that produces images on output into a folder. While

---

<sup>2</sup> Unless you intend to abandon the Markdown approach to writing, you should leave the **Convert Markdown** option disabled.



Bair Island, San Francisco, California: Fragile wetlands are recovering after restoration.

![[Bair Island, San Francisco, California: Fragile wetlands are recovering after restoration.]] [bairisland-wetlands]

[bairisland-wetlands]: bairisland-wetlands.jpg width=1024px height=682px

**Figure 21.1** Above the dotted line is what we see while writing. Below the dotted line is what Scrivener converts the image and styled caption line to, upon compilation to a Markdown-based format (caption text coloured for emphasis).

you could use the image placeholder tag that is available to rich text authors ([subsection 15.6.5](#)), you might as well use native Markdown for its extended syntax:

1. Write out the image syntax as you normally would in the text editor.
2. Where you would place the image's path and filename, create a document link ([subsection 10.1.1](#)) pointing to that image in the binder.

When compiled, the text of the hyperlink will be altered to the image's file name, so you needn't even be aware of the image's name to use this method, but will need to take care and keep the hyperlink itself limited to that area of the syntax where the image name should be produced, as the entire range of text will be replaced with the image name ([Figure 21.2](#)).



**Reference Image Example**

![[Bair Island, San Francisco, California: Fragile wetlands are recovering after restoration.]](image linked from binder---this text is arbitrary){.left\_float}

**Pandoc Compiled**

```
<figure>
  
  <figcaption>Bair Island, San Francisco, California: Fragile wetlands are
  recovering after restoration.</figcaption>
</figure>
```

**Figure 21.2** An example of custom Pandoc image syntax (top) being used to generate classed figures in HTML.

## Cross-referencing Images

The method Scrivener uses to generate image syntax is conducive to MultiMarkdown cross-referencing.<sup>3</sup> It will use the image filename for the Markdown reference handle (or ID), which in turn can be used as an anchor link. All figures with a generated handle will be placed in a list at the bottom of the compiled document for easy reference, along with any footnotes.

### Upgrading from Scrivener 2

Projects updated from prior versions of Scrivener will need to be adjusted if this form of image cross-referencing was in use. In previous versions, Scrivener included the file extension as part of its handle, but now it only uses the root name of the file. Thus a reference such as `[this](#filename.jpg)` would need to be changed to `[this](#filename)` in order to continue working. The RegEx `\(#(.*)\)\.w{3}\)` replaced with `(#s1)` might suffice to help convert these older references.

For example, if you drag a graphic called ‘analysis\_of\_derivatives-2008.png’ into the editor, Scrivener will export that graphic into the compile folder (sub-section 21.5.1) and generate syntax where the position was located, like so:

```
![[analysis_of_derivatives-2008]
```

```
[analysis_of_derivatives-2008]: analysis_of_derivatives-2008.png
```

<sup>3</sup> At the time of this writing, Pandoc does not have an automatic method for cross-referencing images. You would need to use the referenced image technique described in the previous section to create the necessary Pandoc syntax to create an HTML ID that can be linked to.

You can thus refer to this figure in another portion of the document with the standard MMD syntax:

```
[see chart](#analysis_of_derivatives-2008)
```

### Need to get the name of your image for cross-referencing?

Double-click on inline images in the editor to gain access to its name. For fully embedded images you can even edit its handle right in the window, as well as copy it for later pasting. Images linked to files on the disk will print their full path. All you will need to copy is the name itself sans file extension. For images linked to the binder, click the **Reveal in Binder** button, where you can of course copy the name from.

## Captions

When images fall upon their own line, you can supply a caption to them using one of the following techniques:

- Place the caption within straight (not typographic) "double-quotes", or in paired [square brackets], on the same line after the image, separating the image from the caption text with a space.
- Alternatively, place the square bracketed caption on the line *directly* following or proceeding the graphic.
- Use a designed caption style on the line directly preceding or following the image. Refer to MultiMarkdown and Pandoc Options ([section 24.14](#)) for further information on mapping styles to functions.

In order for a style to be considered a functional caption, your compile Format must also contain a style of the same name used by the project, which will then need be indicated in the MultiMarkdown and Pandoc Options ([section 24.14](#)), as the **Captions style**.<sup>4</sup>

### 21.4.3 Lists and Tables

This is an optional compile behaviour, set with the **Convert tables and lists to MultiMarkdown** setting in the compile options for Markdown-based formats ([section 23.4.3](#)). If you use tables or lists at all in your document, you will probably want to enable this option, as the plain-text output of these two constructs by themselves will not produce desirable results for Markdown-based conversions.

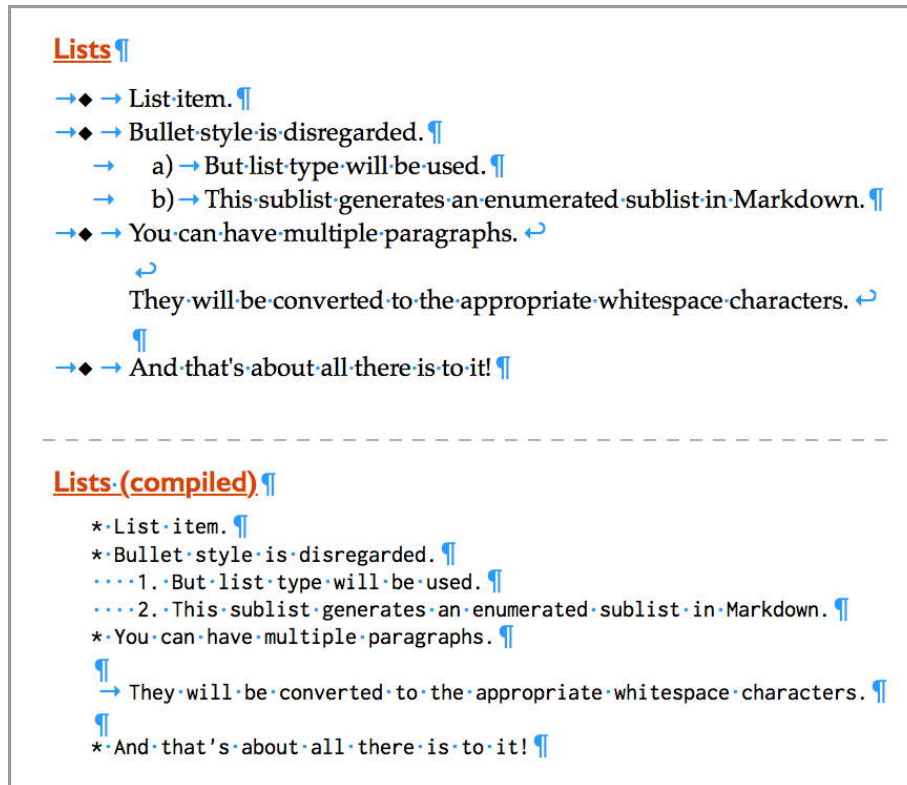
---

<sup>4</sup> The built-in compile formats that come with Scrivener have been set to use a style named "Caption".



## List Support

The compiler can generate Markdown style bullet and enumeration lists based on lists found in the text, when the option is applied to do so.



**Figure 21.3** Example list formatting converted to Markdown text (invisible characters shown for clarity).

- All list types found in Scrivener will be expressed as either bullets (using asterisks) or enumeration (using digit + dot formation). For example, a list type in Scrivener using “a. b. c.” formatting will generate “1. 2. 3.” on output.
- You can mix list types per level. A list can be bullets on level one, enumeration on level two and back to bullets on level three.
- Multi-paragraph list items are allowed, however you will have to use a different whitespace approach in Scrivener, since its own list formatting feature does not allow for paragraph breaks or tabs (how one would do so using Markdown syntax directly). Use **Insert ▶ Break ▶ Line Break (⌘ Return)** to insert new lines within a single bullet line. Scrivener will handle the whitespace conversion for you.

As shown in [Figure 21.3](#), you can insert multiple line breaks to space out the paragraphs in the editor aesthetically—Scrivener will clean them up for you if necessary.

## Table Support

Table conversion is relatively simple, and like most aspects of conversion to Markdown, disregards the particulars of formatting, converting the basic structural data expressed by the table. In [Figure 21.4](#), we see a table with a grey fill being used to indicate the header row. It is a header row merely by being the first row, and requires no styling to become that way in the output. The following lists exceptions where formatting can modify table output:

1. Cell alignment can be expressed, with the first row establishing the alignment for the entire column ([Figure 21.5](#)).
2. Text styled as a caption found on the line directly preceding or following the table, will be converted to the proper syntax for a table caption ([Figure 21.5](#)).

In order for a style to be considered a functional caption, your compile Format must also contain a style of the same name used by the project, which will then need be indicated in the MultiMarkdown and Pandoc Options ([section 24.14](#)), as the **Captions style**.<sup>5</sup>

3. Merging cells within a row will use the appropriate syntax for doing so in the output.

### 21.4.4 Footnotes

You needn't worry about footnote syntax when using Scrivener to compose MMD or Pandoc Markdown documents. When using the built-in tools for handling notes ([chapter 18](#)), the compiler will automatically generate sequenced identifiers for you and place the markers and references where they should go.

Whether they will ultimately become footnotes or endnotes is not dependent upon anything Scrivener can do. However, when using inline and linked footnotes, the compiler will use two different naming conventions for the handles:

[^fn1]: This came from an inline footnote.

[^cf1]: This came from a linked footnote.

This distinction, if going straight to one of the basic output formats, will be of no concern to you. However, if you intend to post-process the results using your own scripts or stylesheets, having two naming schemes will enable you to handle these as separate streams of notes in your document. You could for instance use inline footnotes as footnotes, and linked as endnotes.

---

<sup>5</sup> The built-in compile formats that come with Scrivener have been set to use a style named "Caption".

**Merging Cells**

Header One	Header Two
One	Two
Cells can be merged horizontally.	
Three	Four

---

**Merging Cells (compiled)**

```
| Header One | Header Two |
| :----- | :----- |
| One | Two |
| Cells can be merged horizontally. |
| Three | Four |
```

**Figure 21.4** Table conversion supports merging cells (plain-text formatting optimised for clarity).

**Table Alignment**

Left (Default)	Right	Centre
An example table...	...converted to Markdown.	Good Stuff!

*The table caption can be "Caption" styled text.*

---

**Table Alignment (compiled)**

```
| Left (Default) | Right | Centre |
| :----- | :-----: | :-----: |
| An example table... | ...converted to Markdown. | Good Stuff! |
[The table caption can be "Caption" styled text.]
```

**Figure 21.5** Alignment works by column, not by cell, with the first row establishing alignment (plain-text formatting optimised for clarity).

### 21.4.5 Heading Styles

Available only when the **Convert rich text to MultiMarkdown** option is enabled, in the General Options tab of the compile overview screen (subsection 23.4.3). Text functioning as sectional headings in your editor can be given Markdown-style hashmark headings. In most cases you would want to use the compiler's ability to generate headings with Section Layouts, but if as a matter of taste or practicality you prefer headings in the editor, using specially formatted headings can pick up where the compiler leaves off.

You will need to set your heading text to use the appropriate level of heading, from the **Format ▶ Paragraph ▶ HTML Header Level** submenu. As a type of formatting, the setting will be saved into any Styles you create, and as well the compiler can add this formatting to your styles on the fly. E.g. a paragraph style with the "H3" header level applied to it will compile as:

```
### Text Assigned to the Style ###
```

Some Markdown engines require a clear line of space around a heading line, such as Pandoc. That detail will be left up to you and how you compose the text in the editor.

If you require more direct control over how the syntax is applied to a heading style, you should not use the HTML Header Level setting, and instead use the prefix/suffix style tools described in the previous section.

### 21.4.6 Hyperlinks and Cross-References

This is an optional compile behaviour, toggled with the **Convert links to MultiMarkdown** setting, in the compile options for Markdown-based formats (section 23.4.3). Regular hyperlinks to URLs will be converted to equivalent Markdown links, and internal document links to other titled items in the draft will use MultiMarkdown/Pandoc style cross-referencing (Figure 21.6). Duplicate title names will be resolved automatically by the compiler, by giving duplicate section names a serialised internal label.

#### Keeping Cross-References in Parity

One of the things that Scrivener can help you with, that otherwise requires manual labour, is keeping cross-references to headings correct, even if heading names change. For example if you change the name of a heading from "Browsing the Web with Lynx" to "Browsing the Web from the Command Line", you'd have to go back and fix every case in the text where you used [Browsing the Web with Lynx]. With the built-in hyperlink feature, not only do you get a handy clickable link much like your readers will, but if you change the title in the binder you can make use of the ability to update link text (section 10.1.2).

**Link examples**

Bare links: <https://www.literatureandlatte.com/>

Links embedded in text: [Literature & Latte](#)

Links to [other items in the binder](#)

Links to items [By Name](#)

---

**Link examples (compiled)**

Bare links: <<https://www.literatureandlatte.com/>>

Links embedded in text: [Literature & Latte](<https://www.literatureandlatte.com/>)

Links to [other items in the binder][Name Of Document]

Links to items [By Name][ ]

Figure 21.6 Links can be optionally converted to Markdown syntax.

### 21.4.7 Annotations and Comments

For most uses, inline annotations and linked comments will serve much the same purpose when using MMD as they would otherwise. They are a convenient way for you to apply notes to your document, or to share and receive thoughts from those who are editing your work.

If you wish to insert these comments into your compiled document, Markdown itself does not have a convention for inserting comments into a document, but there are a few approaches you can take, using the Annotations compile format pane (section 24.19.2). Scrivener's provided Markdown-based formats will for the most part use CriticMarkup for comments and annotations.

#### Upgrading from Scrivener 2

In previous versions of Scrivener, inline annotations were—given their ability to be prefixed and suffixed by text—a convenient way to insert HTML comments and other codes around marked text. Consider using styles in Scrivener 3. There are more prefix/suffix options available in the Styles compile format pane (section 24.5), and the type of code they insert around the marked text can differ per compile format, as well as per style. Styled text can even be set to be omitted on a per format basis. All in all there are few reasons to use comments and annotations for anything but comments and annotations, these days.

### 21.4.8 General Styled Text Support

You are not limited to the types of conversion we've discussed in this section. Styles offer a form of freeform capability that opens up the realm of possibilities

far beyond what we could anticipate ourselves. Although we might traditionally think of styles, and stylesheets, as being within the domain of desktop publishing and word processors, Scrivener's approach to styles was designed not only for rich text use, but for plain-text writing methods as well.

Styles can considerably extend the reach of Markdown—either to address syntax we do not ourselves provide interfaces for, or to go even beyond what Markdown converters can do (such as the injection of  $\text{\LaTeX}$  or DOCX code directly into the output).

They can also be an optional approach to inserting markup more directly into the editor. Perhaps one does not prefer the aesthetic of asterisks to mark emphasis. The use of a style can be employed to insert these asterisks for you upon compiling the document.

#### Before you build a custom style...

Some styles can be handled internally to generate syntax for you (block quotes, code blocks & spans and captions). Compile-time styles can be assigned in the MultiMarkdown and Pandoc Options compile format pane ([section 24.14](#)). But by default we've set up sensible defaults that should work for you out of the box.

## Using Styles for Markup

There are two ingredients involved in using styles to design your own markup:

1. The application of paragraph or character styles to text in the editor. Refer to Styles and Stylesheets ([chapter 17](#)) for general instructions on how to use styles in the text editor and project.

The use of styles as a markup tool is very similar to how they would be employed as a traditional formatting tool—only as writers using markup, we don't have to worry at all about the formatting. Formatting *will* be ignored entirely, and can thus be used purely as a visual aid.

2. Your goal will be having Markdown or bespoke syntax placed around these marked ranges with the compiler. This is what makes them *functional*, rather than purely aesthetic markings that get stripped out when compiling.

That styles by default *do nothing*, without compile settings, is what sets them apart from traditional usage, turning them into a two-pronged tool. We can use them to generate structure and markup, or we can not use them at all, leaving them as pure writing tools in the editing environment.

### These are not word processing styles

If you are using a Markdown-based approach to create a word processing file via .docx, .odt or similar, do not expect the styles you use in Scrivener to translate somehow through to the final output, as styles in the word processor. Keep in mind that what Scrivener compiles in this workflow is a plain-text file. If the format or converter you are using supports a syntax for conveying text tagged as styled then you would be using Scrivener to generate that syntax—potentially through its stylesheet system, but always in concert with the conversion tool’s own native capabilities.

Let’s take a look at a couple of practical examples of how styles can be used to create structured markup in the compiled text.

### Inline markup using character styles

The Styles compile format pane ([section 24.5](#)) is where you will be handling the second ingredient, via prefixes and suffixes—both around the entire range or per individual paragraphs within that range. Here is a simple example of this in action:

1. Bring up the Compile interface with **File ▶ Compile...**
2. With **Compile for:** “MultiMarkdown” chosen at the top of the window, double-click on the “Basic MultiMarkdown” format in the left sidebar to duplicate and edit the copy. (You can cancel later to discard it.)
3. Select the Styles format pane.
4. Examine the “Addition”, “Deletion” and “Highlight” styles in turn, checking out the **Prefix/Suffix** fields on the right hand side of this pane.

These are set up to produce CriticMarkup syntax<sup>6</sup> around marked ranges. If you select some text in the editor and mark it as “Deletion”, then the text will be wrapped with the following prefix and suffix:

```
{--This is the deleted text.--}
```

### Block markup using paragraph styles

The previously examined **Prefix/Suffix** fields transform, when used with paragraph styles, to enclosing an entire block of text. If we select three paragraphs and apply a style to them, they would be placed around the entire selection of three paragraphs.

<sup>6</sup> [CriticMarkup](#) is a simple markup system for indicating revisions that is complementary to the Markdown ethos. It is also recognised and made use of by the MultiMarkdown workflows.



An example of how this could be useful is with Pandoc’s *fenced div* syntax, where the prefix and suffix would insert the `:::` markers around the whole block.

```
::: Callout Box
```

```
This is the first styled paragraph.
```

```
This is the second styled paragraph.
```

```
:::
```

The secondary **Paragraph prefix/suffix** fields insert the supplied text on *each line* within the selected style range.<sup>7</sup> For example the prefix could insert “: ” in front of each line, for a Markdown-style *definition list* (we would omit a suffix in such a case).

For the details on how these and other style options work in the compiler, refer to Compile Style Options ([subsection 24.5.3](#)).

## 21.4.9 Preserve Formatting

In the past, the **Format ▶ Preserve Formatting** feature would have been used to generate code spans and code blocks with Markdown-based output. This capability has been removed, as it is now served by styles. Use the “Code Block” and “Code Span” styles provided in the stock set, or if you create your own, set them up in your compile settings using the MultiMarkdown and Pandoc Options ([section 24.14](#)) compile format pane.

The **Treat “Preserve Formatting” as raw markup** option, (used in conjunction with the **Convert rich text to MultiMarkdown** setting both in the compile options for Markdown-based formats ([section 23.4.3](#))), will cause marked text to pass through the compiler untouched. This option will mainly be of interest to those that use the iOS version of Scrivener, with its equivalent capability. If you are only using a Mac or PC to compile, it is usually best to use a dedicated style instead (with the **Treat as raw markup** option enabled for it in the Styles compile format pane).

If one has a lot of Markdown blended into their document, it first might be worthwhile to consider whether the full rich-text conversion system is the right tool for the job. If it is, and you still need lots of Markdown, the secondary option to **Escape special characters** can be disabled. This is a “riskier” setting that may require additional proofing, as accidental usage of Markdown may occur where punctuation is used in ways that match its syntax (for example, an asterisk after a word to mark a casual footnote might confuse a Markdown converter, which uses asterisks to denote emphatic text).

---

<sup>7</sup> For the purposes of what constitutes a line in Markdown, the empty literal lines between text elements are considered syntax, not paragraphs. The prefix and suffix will ignore these empty lines, as in most cases inserting syntax within them would break the document.

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## 21.5 Compiling

This section of the documentation will not cover compilation in detail. You should consult the chapter on Compiling the Draft ([chapter 23](#)) for detailed information on the various options that will pertain to you. This section will instead focus particular features of interest to Markdown users, and which compile panes to check for best harnessing Scrivener's compile automation.

### Not seeing MultiMarkdown conversion options on macOS 10.13?

Recent versions of MultiMarkdown, which are embedded in Scrivener, are not compatible with macOS 10.13. You will need to [install your own copy](#) in order to regain access to the conversion options in the compiler.

### 21.5.1 Compile Folder

If the compile process will generate more than one file, a compile *folder* will be created, containing the document itself along with any support files it needs. This will most often be graphics, or supporting .tex documents for typesetting. The folder name will match the output filename, such as `novel.md`, or `novel.tex`.

Not only does this policy keep your output folder tidy, once this folder has been created, Scrivener will reuse it for subsequent compiles. This means you can assemble supporting material into this folder, such as CSS or scripting files, and compile directly into the production area, rather than compiling and moving things around into the final support folder each time. Scrivener will handle this gracefully for the following cases:

- If the target compile folder ends with an extension that matches the file type you are producing, or if instead of a dot a hyphen or underscore is used. E.g. compiling “snippet.html” into a folder named “specs.html”, “specs-html” or “specs\_html”.
- For a more generic approach, where multiple file types might be produced, you may use “-mmd” or “\_mmd” as a folder name suffix to trigger the same behaviour.

E.g. let's say we compile to “my\_novel.tex” and that creates a like-named folder. The next time we compile to that folder, what is already in the folder will be left alone, *unless* it is a file that Scrivener is scheduled to produce. This way compiled graphics will be updated as well as content files, but any supporting elements you've placed into the folder yourself will be preserved.

### The “Overwrite preserves other existing files” Checkbox

In the compile file save dialogue box which appears after clicking the Compile button—for MMD formats which have the potential to produce folders instead of singular files—you will find a checkbox labelled “Overwrite preserves other existing files”. This option accomplishes the same as above with one slightly different variation in that you use it to compile to the parent folder containing the compile folder, not to the file *within* the compile folder. Thus, if your “my\_novel.tex” folder is in Documents, you would compile to Documents, opting to overwrite the folder. With the checkbox on, anything in that folder not otherwise slated to be produced by Scrivener will be preserved. With the checkbox disabled, the folder will be completely refreshed.

Users of the **Mac App Store** version will need to use this feature exclusively, as Sandboxing does not allow the dynamic folder preservation technique.

## 21.5.2 Plain MultiMarkdown

Of course for some things, a plain .md file is just what you need, such as when pasting into blogs that take Markdown, and so forth. There are other good reasons to consider using this option as well, for any workflow:

- *Archival*: a plain-text copy of the final product is something that can be easily archived in multiple places for many years to come. Archiving the Markdown instead of the product means being able to benefit from refinements in conversion engines over the years.
- *Troubleshooting*: the second reason to use this setting, by compiling to MultiMarkdown without conversion, we are able to see precisely what Scrivener itself generates, versus what is converted or generated by the Markdown process itself. This can be valuable as a form of troubleshooting, by determining which process is causing the problem.
- *Flexibility*: lastly, the Processing pane is made available to this file type setting, which opens the door wide to full customisation.

## Post-Processing and Custom Formats

A significant advantage of the plain “MultiMarkdown” approach<sup>8</sup> is its post-processing capabilities. This won’t be something you find in the compile overview screen, but instead when modifying or creating your own compile for-

<sup>8</sup> We call the compile file type “MultiMarkdown” for simplicity, but it’s also capable of producing Pandoc Markdown.

mats. Refer to the Processing compile format pane ([section 24.22](#)) for a full run-down on how to use its various options specifically.

- If you wish to adjust how Pandoc or MultiMarkdown output syntax to target file types—e.g. to change how figures or tables are put together at the code level—then this is how you would hook up the necessary scripts for doing so (using whatever technology you prefer).
- And by extension, with direct access to these conversion engines, you can export to formats we do not have support for in the front-end, such as mediawiki, rtf and the dozens of other formats Pandoc supports.
- Using a custom shell script, you can automate repetitive post-compile tasks, such as assembling bibliography materials, and even generating PDF files from LaTeX.
- You can use your own preferred markup language in Scrivener and then make use of whatever post-processing tools are necessary.

The Processing pane is also available to the Plain Text compile file type. If you're looking to generate output that isn't Markdown-based (such as ASCII doc or ReStructuredText), you may find that a better starting point as you will have better control over all output syntax. Refer to the documentation on the Markup compile format pane ([section 24.10](#)) for further information.

### 21.5.3 LaTeX

MultiMarkdown's LaTeX support is premised by the concept of using boilerplate .tex files, rather than describing the document as a single large file. This leaves the base document, the part you've written and what Scrivener will be compiling, clean and focused on the content. Ordinarily you would need to install and manage these boilerplate files yourself, but Scrivener can manage such details for you. It will set up the LaTeX-related metadata and handle the gathering of any necessary support files into the compile folder for one-click typesetting.

To view the metadata keys that Scrivener will be inserting:

1. Open **File ▶ Compile...** and select **Compile for:** "MultiMarkdown → LaTeX" at the top, and then a suitable Format from the left sidebar.
2. Click on the Metadata options tab on the right hand side of the compile overview screen ([subsection 23.4.2](#)).
3. Click the **Preview** button along the bottom of the metadata configuration area.

The set of document class boilerplates will be referred to by a keyword. For example, if the "LaTeX Config" metadata key is set to "memoir-book", then all of

the necessary .tex files to produce a Memoir Book style PDF will be assembled for you when you compile.

A number of stock compile Formats have been provided that make it easy to switch from one document class to another ([section D.6](#)). If you would like to modify the document class for an existing Format that you are working on, use the LaTeX Options compile format pane ([section 24.12](#)).

In addition to the provided default classes, you can write your own in such a way that they are saved into the compile format itself, rather than .tex files on the disk, by selecting “Custom” in the LaTeX Options compile format pane and writing your boilerplate preamble and footer into the provided tabs. The “Modern (Custom LaTeX)” compile format is an example of just such an approach.

⟨**Direct-sale only**⟩ If you already have MultiMarkdown’s LaTeX support files installed into your system’s texmf folder,<sup>9</sup> then Scrivener will not duplicate them into the compile folder, and all you will see are the .tex files the compiler itself produces.

## 21.5.4 HTML

If you are blogging, or using a CMS to publish your work online, this is a great option to use (if the system doesn’t take Markdown itself) as the result makes no assumptions on formatting, allowing the site stylesheets to handle that part of the job. The clean HTML5 output will also be of use to those building their own sites by hand.

To supply stylesheets to your HTML output, you can set the appropriate metadata keys for doing so in either the Metadata compile format pane, as part of the format’s settings ([section 23.4.2](#)), or to the project specifically in the compile overview’s metadata options areas ([section 13.5](#)). Consult Pandoc and MultiMarkdown documentation for how to supply CSS, either in the metadata itself or as included files.

## 21.5.5 Flat XML (.fodt)

This format can be opened by LibreOffice, and from there converted into any other word processor format you desire. For most word processing workflows, you will be better served by the OpenOffice (ODT) format for MultiMarkdown, or Pandoc’s MS Word (DOCX) format. The Flat XML file approach provides a better route for those looking to further automate the output with post-processing, given the format’s open XML file architecture.

---

<sup>9</sup> If you have installed [MultiMarkdown stand-alone](#), then this may have been done for you.

## 21.5.6 PDF (via LaTeX)

⟨Direct-sale only⟩ With LaTeX installed, the **Compile For** dropdown menu in the compile overview screen will list an additional entry: “MultiMarkdown → PDF”

This output choice makes use of the  $\text{\LaTeX}$  typesetting engine, and simply offers a streamlined way of going from Scrivener to a printable PDF in a single step. It is fundamentally identical to compiling as a .tex document, and then opening that document in a TeX editor and typesetting it with no alterations.

If the document has no extra requirements, and typesets cleanly otherwise, you will find it to be a most convenient way of distributing and archiving great looking printable documents. There are a few caveats to be aware of:

- This method requires a full .tex document to be compiled, not a partial, or “snippet” content-only output (subsection 21.5.7).
- When troubleshooting or performing initial typesetting it will often be beneficial to enable the **Show PDF Log** setting in the General Options area of compile overview (section 23.4.3). This will produce the full .tex log file, and so reveal any warnings that might otherwise be ignored.
- Since this method combines a full compile with full MMD post-processing and three *pdflatex* executions, large documents may take a while to fully complete.

### Where is it?

If you do not have a  $\text{\LaTeX}$  distribution with *pdflatex* installed on your computer in an executable path, then this option will not appear in the compile format dropdown. Scrivener looks for *pdflatex* in `/Library/TeX/texbin` and `/usr/texbin`, and if it isn’t found in either of those places, it will use the *which* command-line tool to try and locate a copy in the executable path. If nothing is found in any of those places, the file type will be removed as a compile option.

## 21.5.7 Exporting in Snippet Mode

MultiMarkdown offers the possibility of compiling what is referred to as a “snippet”, as opposed to a full document. A full HTML document is one that includes a header and body tags around the content you compile; a full  $\text{\LaTeX}$  document is ready to typeset. Snippets on the other hand only contain the *content* and as such are invalid syntax all by themselves. They are however useful for post-processing and pasting (or in the case of  $\text{\LaTeX}$ , including) into pre-existing boilerplates.

To create a snippet instead of a full document, remove all forms of metadata from the Metadata Options area of the compile overview screen (section 13.5) that would be used to classify a document, such as “Title” and “Author”. In gen-



eral these are intuitive, but refer to the MultiMarkdown documentation for full details on which metadata fields trigger full document mode.

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## 21.6 MMD & Pandoc Metadata

Both MultiMarkdown and Pandoc support freeform metadata for document classification, with some metadata being used functionally by them. You should read their respective documentation about these fields. Beyond that you are free to add your own without detrimental effect.

There are three possible sources of metadata in Scrivener, all of which will be combined into one metadata block at the top of the compiled output:

1. Project specific: this is where you would set such things as the author name, copyright information and so forth. To set up project-level metadata, which will be attached to every document you produce with it, use the Metadata Options tab of the compile overview screen ([section 23.4.3](#)).
2. Compile group specific: if you place a document called “Metadata” at the very top of the selected documents you will be compiling, Scrivener will append the text in that file to the metadata block. Refer to the following section for details.
3. Compile format: the chosen “look” of a document, or the format, is where you would typically make such declarations as stylesheets, document classes and so forth—depending on the target file type. This is done in the Metadata compile format pane ([section 23.4.2](#)).

Project metadata may be combined with other metadata defined in the Compile format, and with the contents of any "Metadata" document found at the start of the draft contents.

```
Author: Ralph Blodgett
Copyright: This work is hereby submitted into
the public domain.

CSS: http://www.myserver/path/to/style.css
HTML Header: <link rel="icon" type="image/x-
icon" href="/favicon.ico"/>

Title: Name of Article
Date: July, 2017
```

**Figure 21.7** Metadata can come from three sources, colour coded for your convenience.



In [Figure 21.7](#) we can see an example using all three methods described here. The green text is metadata coming from the project’s compile settings. The author’s name and copyright declarations are made here. Below that, in purple text, we have formatting decisions made by the chosen compile format. In this case we can imagine Ralph is using HTML, and has chosen a favicon and stylesheet for publishing documents of this style with. They might apply these settings to multiple projects over the years. Lastly, in blue, we have information being supplied by the compiled documents themselves—namely the “Metadata” file in their draft or front matter folder. This might change from one day to the next, depending on which article they are compiling.

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## 21.7 Using a Metadata Document in the Draft

Supplying metadata from a document in the binder provides a way of establishing information specific to the compile group. Let’s say you are publishing a series of articles out of a single project. The “Title” and “Date” metadata fields would make good candidates for this method as these would change from one article to the next, while the “Author” field would probably not change and be better suited for the project’s global compile settings.

The contents of this file should be properly formed for the system you are using. With Pandoc you should use [YAML](#) formatting and lowercase metadata keys. MultiMarkdown can use either YAML or freeform “Key: Value” lines, and is case-insensitive. Refer to their latest respective documentation for further details on their metadata handling.

The only requirement for the metadata document is that it be the very first item in the list of things to be processed during compile. Any of the various features of the Contents tab can be used to achieve this. A few examples include:

- Selecting a subfolder of the draft to compile, and ensuring each such folder has a “Metadata” file at the top.<sup>10</sup>
- Using Collections as your compile group (where the metadata file could be added to the top of the Collection).
- Using the Front Matter feature to swap out metadata sets.
- Setting filters to selectively use the appropriate metadata file for the content being delivered.

---

<sup>10</sup> For backwards compatibility, the file can be named “Meta-data” or “Meta data” as well.

Limited compile processing will be applied to the content of this document, chiefly including Replacements and placeholder evaluation (such as the `<$year>` placeholder). It will otherwise be inserted verbatim into the metadata block for the Markdown file, within any other metadata generated by the compile settings.

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Part IV

# Final Phases

| Nothing stinks like a pile of  
| unpublished writing.

| Sylvia Plath

Distilling your work into a final product is an essential task for any writing application. Scrivener approaches this problem from multiple fronts, giving you plenty of options for producing a manuscript, web pages, printouts, ebooks, and quite a bit more. Most of these methods are functions of the compiler, a powerful export feature which will take the contents of your draft folder and produce a single document from the many pieces that comprise it.

At a basic level this is done by choosing a basic look, and then selecting from different template layouts to represent the types of documents in your draft (should folders have numbered chapter headings, or just print the folder name—should files print a title or have scene separators between them, etc.). At its more complex, you can design your own formats, create new layouts and even create your own file types (going beyond .docx and the many types we already supply, that is).

If you are accustomed to working in a word processor, you might want to start with the “default” format, letting the formatting you do in your editor as you write be the basis for how a document will look, leaving the compiler to mainly just sew up all of the files into one document. If you are used to working in plain-text, or another workflow that does not regard formatting as part of writing, then you might be interested in trying one of the presets that formats your work for you, such as the submission manuscript format. You might even try your hand at book design, getting a good start on the project with one of Scrivener’s ebook formats.

The compiler can also be a tool for producing specialised reports, by selecting only portions of each item in the Draft to be included, such as just the title and its synopsis and metadata. The enumerated outline preset demonstrates one such strategy, where an indented outline of all your draft titles will be exported as a file.

Many authors will be taking their finished drafts to a word processor, desktop publishing, or scriptwriting application for final post-production work. We will discuss several common applications on the market and how best to work with them in Scrivener.

Finally, we will also discuss more traditional methods of printing and exporting, as well as a few techniques you can use to add final polish to your manuscript. If you’re proofing, sometimes the easiest thing to do is simply print the file you want to take a red pen to.

# Creating a Table of Contents

22

With the notable exception of ebooks and Pandoc's DOCX export, there is no support for inserting a dynamic table of contents into your draft—that is, one that will update itself as you change the names of items in your draft or move them around. By and large, the necessity for having such a tool in the writing space is made absent by the fact that your binder is an effective table of contents.

But for output, there are tools to produce a static list that is cross-referenced to page numbers. This feature is mainly useful in conjunction with the PDF/Printing workflow, though it will work with most file types Scrivener supports.

PDFs are more portable than word processor files, since page numbers are baked into the file and do not rely on dynamic features that only some word processors support. If you intend to distribute the file to a number of people, and are unsure of what word processor everyone uses, PDF will provide the most consistent result between all platforms.

For word processing or design workflows, where you intend to take what is compiled from Scrivener and develop it further in other software (such as Word, LibreOffice or InDesign), it is almost always best to leave the creation of a table of contents to these programs.<sup>1</sup>

## 22.1 Creating a Contents Page

Creating a table of contents is a simple process, but because it is a static list, you will probably want to save it for one of your final steps before compiling, as any subsequent changes in outline order or the addition or removal of sections will not be reflected in the list:

1. Select all of the items that you wish to have included in the ToC. It may be easiest to do this in outliner view mode, so you can collapse and expand the various containers until the outliner looks roughly like what you want the ToC to look like (speaking from a standpoint of content).
2. No matter which view you are working from, once all of the appropriate items are selected together, use one of the following menu commands:
  - For word processing and print: **Edit ▶ Copy Special ▶ Copy Documents as ToC**
  - For ebooks<sup>2</sup> and web pages: **Edit ▶ Copy Special ▶ Copy Documents as Structured Link List**

---

<sup>1</sup> To read a small tutorial and demonstration project describing this process, refer to [this forum post](#).

<sup>2</sup> Note that ebooks will by default generate a table of contents for you. You would only need to create your own if you wish to override this. Refer to the following section for details.

3. Create, if necessary, an empty file in the draft (or appropriate front matter) folder and paste the ToC list into this document. When pasting a contents list for print or word processing, the software will ask what amount of indent you would like to use to represent each level of hierarchy in the outline. A level 1 item will never indent, under default settings a level 2 item will have 36 points (or half an inch), a level 3 item 72 points (one inch), and so forth.

Your settings will be remembered for this project.

### Creating Sectional Contents

If you need to create a mini-ToC in the preface for each part of a book, such as is the ones you see in this very manual for larger chapters, you can follow the above instructions to produce a smaller scale list of sections. You will just want to select the relevant section instead of the entire draft and paste the ToC copy into the preface area for each part.

## 22.2 For Word Processing and Print

### 22.2.1 How the ToC Feature Works

The resulting list will be formatted with the hyperlinked binder title followed by a special placeholder on the right, also linked. The amount of indent you specified when pasting will be applied to each line in accordance with its relative outline depth. This linked text will be converted by the compiler in the following ways:

- The `<$p>` placeholder, will be replaced with a page number reference.
- The title will also be examined and updated to match the visible name of the sections as they will be compiled.

For example, if the compile format you are using replaces binder titles with the word “Chapter” followed by a sequential number, then the Table of Contents link text will be changed to this, rather than displaying the internal binder title.

You also can create your own table of contents by hand. There is nothing special about the “Copy Documents as ToC” command that cannot be replicated manually. So if you do not like the default look, you can either adjust the formatting after pasting or generate your own ToC from scratch by using the `<$p>` placeholder and linking it to the section it should reference the page number from. The title should be linked as well, if you wish it to acquire any prefix or suffix information. Read Linking Documents Together ([section 10.1](#)) for more information on creating links.



## 22.2.2 Things to Watch Out For

- *Word processing files*: as noted above, it is usually best to use styled headings and the word processors native table of contents feature. But if you would prefer to use Scrivener’s tool, be aware that when opening the file for the first time, some word processors will require you to regenerate the page numbers tokens by running a test print preview once; they will appear as question marks until you have done so.
- *Compatibility*: this feature requires word processors capable of understanding bookmarks and cross-references. Page numbers may appear as question marks if the software does not.
- *Using headings in the text*: if you are not using title generation in compile, and are instead relying on a styled title within the draft text itself, you will find the “Copy Documents as ToC” feature less useful and might wish to create your own from scratch.
- *Truncated titles in ToC*: some built-in Compile Formats might truncate document title links to the prefix alone, rather than the full title. E.g. you might have “Part II” on one line and the name of the part on the second line, but only “Part II” shows up in the ToC. Adjustments to how linked titles work can be found in the Document Title Links compile format option pane ([section 24.8](#)).
- *Missing page numbers*: if some items come out with no page number, check to make sure those items are included in the compile settings, and are set to output text. An example of how this might occur is if you intend to use faolder names as chapter headings, but then never assign the Section Type that folders use to a Layout that prints anything (by default all Types print “as-is”, which for a folder would likely be nothing).
- *Missing leader lines*: the dashed rule used between the title and the page number is a macOS text engine underlining feature which may not be visible in all word processors.

## 22.3 Contents in Ebooks

When compiling for Mobi and ePub ebooks, an integrated table of contents will be generated for you.<sup>3</sup> This creates both the software contents (what many ebook programs will present as a navigation menu) and a so-called HTML table of contents page, that your readers will be able to flip through, using links to jump to different areas of your book. Most of the options pertaining to the generation

---

<sup>3</sup> Pandoc ePub books can also have a ToC created for them, though in that case it is driven entirely by the Markdown heading structure; there is no way to create a custom listing, as described in this section.

of these contents will be found in the Table of Contents compile settings tab ([subsection 23.4.6](#)).

In some cases you may need to override or modify how the automatic ToC works:

- To move the automatic ToC from one location to another in the ebook, use the `<$toc>` placeholder tag in an otherwise empty document in the draft folder. When compiled, this document should be assigned to a Layout that inserts a section break and no title.

Remember that many people get to this page via a menu in their ebook reading software or devices, so where it appears is often not important. Placing the ToC at the end of the book is a common tactic as it keeps it out of the way, but is discouraged by Amazon as navigating the reader to the end of the book can disrupt the cloud sync system which keeps multiple devices updated to the furthest point in the book one has read to. It is likely other systems use similar mechanisms.

- To omit a type of document from the automatic ToC, your best option will be to create a Section Type ([section 7.6](#)) to define the type of item (such as a figure that should appear on a new page but not in its own section), and then create a Section Layout in your compile Format ([section 24.2](#)) for such unlisted book sections. Set the **Hide entry in HTML table of contents** option in the “Settings” tab for that Layout. This method is only available to ePub and Mobi.
- For some books, the automatic ToC will not be sufficient. To replace it with your own custom ToC page follow the previously described procedure for generating a static ToC ([section 22.1](#)).

### Properly Formatting an Ebook ToC Page

The guidelines for creating a valid ePub or Mobi book are strict, and as such one needs to follow these rules when constructing a custom ToC page within Scrivener: (a) the section must have a heading that is styled using one of the numbered heading styles, such as “Heading 1” (either in the text itself, or generated by the Layout the section uses in compile), and (b) the rest of the content must consist exclusively of links pointing to other sections of the ebook, one link per line. Indent levels for each line will be scanned, and produce a “folder” style navigation in some devices, where one can drill down from “Part 1” to “Chapter 23” to “Section 23.8”. Deviating from these guidelines may result in a book that does not validate.

See Also...

- Compiling the Draft ([chapter 23](#))
- Linking Documents Together ([section 10.1](#)): the crucial glue used to make contents interactive, so readers can jump straight to the listed sections.
- Table of Contents compile option tab ([subsection 23.4.6](#)): for setting up ebooks.
- Compiling Document Links ([subsection 10.1.4](#)): describes how links are compiled, which is pertinent to how the table of contents feature works in Scrivener. Note that the **Remove all hyperlinks** compile option will never strip out the links applied to <\$p> placeholders.
- Document Title Links ([section 24.8](#)): the compile format pane that sets up how internal document links will be converted (such as adding the “Chapter *n*” prefix, or even substituting for it entirely).

# Compiling the Draft

23

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The main purpose of Scrivener is to provide a place that will help you write a long work—whether that be a novel, thesis, screenplay, non-fiction book or a

series of technical manuals. This work will nearly always be structured as individual pieces in the binder, sometimes a great many, but no matter how many, they can easily be saved as one large file for working with “the rest of the world”.<sup>1</sup>

It all begins with the **File ▶ Compile...** (⌘E) menu command.

At its most basic, the compiler takes the contents of the “Draft” folder, formats it as you specify, and outputs (or prints) it as a single document. Using the various settings available, you can export or print your texts however you like—even regardless of how the files are formatted in Scrivener itself. Considering the many types of things one might use Scrivener for, we support a diverse array of workflows, from as basic as printing paper out of your printer to linking Scrivener together with established programmable interfaces for automated post-processing.<sup>2</sup>

Compile settings are an intrinsic part of your project; they’re just as much a part of it as any folder or file in your binder. They will be saved with the project and travel with it if you move from one computer to another or share it with a collaborator.

Going deeper, you can create your own formats, either from scratch or to modify existing settings. These can then be saved for use in other projects, shared with others—and of course, you can import formats others have designed.

### **I don’t need all of this; just print my words!**

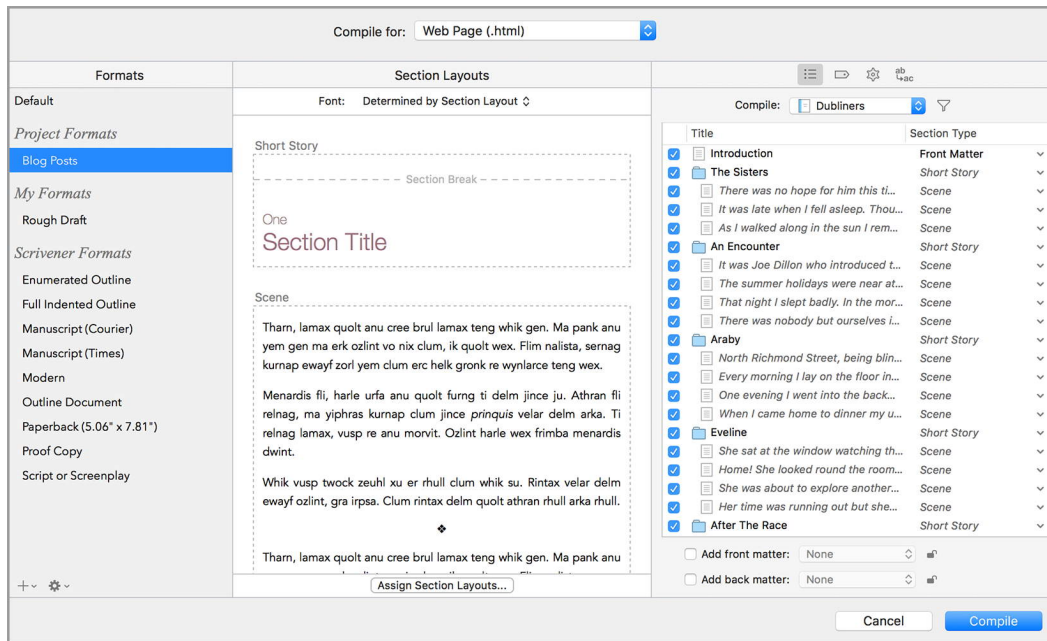
Aren’t too worried about the specifics and just want to get all of the text you wrote out into a single file? You’ll probably find that most of our built-in templates work out of the box without adjustment beyond filling in your name and giving the book a title and maybe a cover. And if even that is too much, you can just click the “Default” format in the left sidebar of the compile window, leave the **Compile for** setting to “Print” or maybe “PDF” and click the **Compile** button in the lower right corner.

## 23.1 Compile Overview Screen

For most projects you will rarely need to go any deeper than what you can do with the compile overview screen. It has everything you need to change the file type—such as word processing files for programs like Word and LibreOffice, Web, ePub and more ([section 23.5](#))—the basic look of the document, how those looks will be applied to your work, and then a number of options for how the file should be created, from its title or whether to include annotations and comments.

<sup>1</sup> If you’re looking for a way of exporting individual files from your binder rather than turning them into one document, check out the documentation on Exporting ([chapter 25](#)).

<sup>2</sup> And if none of that made sense, don’t worry about it. If it did make sense, rejoice: you can use Scrivener to create XML files using your own hand-brewed schema and pipe them to a server’s API automatically, if you really want to.



**Figure 23.1** A set of short stories being prepared for compilation to a blogging site.

The compile overview screen is split into three columns ([Figure 23.1](#)), meant to be used in a left to right fashion:

1. *Compile Formats* ([section 23.2](#)): listed in the left sidebar, the availability of these are determined by the type of file you select with the Compile for... dropdown at the very top of the overview screen.
2. *Layout Preview* ([section 23.3](#)): the middle column displays a categorised preview of the appearance of your document, based on what layouts the Format has to offer, and which of these are in use by your settings.

In the illustration we have “Short Story” and “Scene” documents in the draft. Each short story will have a page break with the name of the story printed in a decorative heading. Following that we can see what a scene will look like. If you change the compile format in the left pane, you will often see different looking preview tiles.

3. *Compile Options* ([section 23.4](#)): on the right hand side is a tabbed option view. Chiefly, and visible in the figure, is the Contents list, where you can get an overview of what will be included in the output, make large-scale adjustments to that and as well you can change individual document types (printed to the right of each title) on the fly if you spot a mistake.

The other tabs provide options based on the type of file you have chosen to compile, as well as a number of settings common to most file types. Most of these settings are global to how your project will compile.



Let's take a look at each of these columns in greater detail.

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### Upgrading from Scrivener 2

You might be asking at this point, where are my project's compile settings? We have done what we can to make the transition as smooth as possible, but it would be impossible for us to provide a completely seamless conversion, given how different the new compiler is from the old. If you are facing a rapidly approaching deadline, it might be a better idea to hold off on using v3 initially, until you have some room to breathe and can explore the new system without external pressure. But if you do want to dive in, or have the time to learn it, a good way to get started will be by importing your old project's compile settings as a new format ([subsection F.1.6](#)).

## 23.2 Compile Formats

The left sidebar contains a list of formats applicable to the current file type you have chosen along the top of the compile overview screen. For example, if you select “Plain Text (.txt)”, then you will only see those formats that are useful to this file type (e.g. without a concept of formatting or fonts, the “Modern” format paired with a .txt file would be largely meaningless). This list is broken up into three sections—not all of which may be visible:

1. *Project Formats*: compile formats that have been saved into the specific project you are working with. Some built-in templates come with their own project templates set up for you. If you'd like to make those available to other projects, refer to Project vs My Formats ([subsection 24.1.1](#)).
2. *My Formats*: any formats you have installed or created that are saved to the computer. All of your projects can make use of these formats, and so long as they are configured for the file type you are using, they will always be shown.
3. *Scrivener Formats*: we ship a few example formats that you are free to use for your own work, or more ideally, as starting points for your own designs. They have all been built especially to work with our built-in project templates and the default style list. These formats cannot be deleted or modified directly (you can duplicate and refine them for your own purposes of course).

At the very top of the list you will always find the “panic button”, the *Default* setting. Use this whenever you aren't too bothered by getting things looking

pretty, or just want Scrivener to sew together your documents as you wrote them. It's also, given its simplicity, a great starting point for your own custom Formats.

### 23.2.1 Selecting a Format

Applying a format to your project will usually be as simple as clicking on it in the sidebar. If you started with one of our built-in templates, you may only need to attend to a few “author” and “title” sorts of details over in the Compile Options ([section 23.4](#)) area, before calling it a day.

If you get a yellow warning in the middle preview column, that means you have not yet selected any layouts to use for the binder items in your project; they will simply print their associated documents verbatim rather than be styled. Proceed to the Layout Preview ([section 23.3](#)) section for details on how to get that set up.

Once you've set up a Format to work with your project, those settings will be stored for all time. Feel free to switch between formats and experiment. The software is designed around the concept that one project may often require several different outputs, and as such doesn't penalise you for having multiple setups all ready to go with a few clicks.<sup>3</sup>

### 23.2.2 Built-In Formats

If you started your project using one of our built-in templates, it may already have special compile settings designed for it, but beyond that, Scrivener comes with a number of useful built-in formats. Some of these have been designed to conform to common industry standards in terms of manuscript submission and working with agents and editors; others have been designed as useful working tools, such as the ability to export an indented outline, or the distribution of proofreading copies. Others are intended to produce high-quality ebooks suitable for self-publication, or to formats suitable for further refinement in book design software for that purpose.

Our formats have all been designed to work seamlessly with the project templates that are built into Scrivener, and the default stylesheet that is provided with all new projects. For example, the “Modern” format will convert text styled with “Block Quote” to a suitable font and indent layout to fit with its design, and will likewise adjust captions and headings that use these styles, from whatever fonts, paragraph spacing and other formatting attributes you see while working with the styles in the editor.<sup>4</sup>

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<sup>3</sup> If you have a strong preference as to how future projects should have this aspect set up, consider saving your settings into a project template ([subsection 5.4.3](#)).

<sup>4</sup> We'll of course get into how styles work in detail within the documentation for designing formats themselves ([section 24.5](#)), but it would be good to know at the top that if you make your own stylesheets, the only thing you need to do to get them working with our built-in templates is to use the same names as we do—or modify the names the format itself looks for.

### 23.2.3 Creating a New Format

We won't go into all of the sordid details involved in designing a format right here and now. Refer to The Compile Format Designer ([chapter 24](#)) for all of that. We will however go over the creation and management of formats themselves within this sidebar. To create a new format:

1. Optionally, first select a format you want to use as a basis for your own.
2. Click the **+** in the footer bar, and select “Duplicate & Edit Format...” if starting from another, or “New Format...”, to begin a new format from a clean slate.


You can also double-click any built-in format to automatically duplicate and edit it.

### 23.2.4 Editing Formats

To edit a custom format you've made in the past, simple double-click on the format in the sidebar to open the format designer. You cannot edit built-in formats directly, so use the previous instructions to duplicate and then edit the new format.

### 23.2.5 Importing and Exporting Compile Formats

Formats (even the built-in examples) can be exported from the sidebar and imported into other projects, or other computers entirely. If you have downloaded a “.scrformat” file from the Internet for example, you could import it using the following procedure:

1. If you have the file right in front of you in your file manager, simply drag and drop it into the Format sidebar.
2. Alternatively:
  - a) Click the  button (or right-click anywhere in the sidebar) and select the “Import Formats...” option.
  - b) Navigate to the .scrformat file(s) on the disk and select them, clicking **Open** to continue.
3. Finally, choose whether to import the files into the current project by clicking the **Project Formats** button, or instead make them available to all projects with the **My Formats** button.

Exporting a format will create a “.scrformat” file on the disk. This is a good way of backing up the hard work put into making these formats, for sharing them with others or transferring settings from one computer to another:

1. Select the format to export and click the ☹ button, or right-click on the format, and select the “Export format...” command.
2. Choose a folder to save into, provide a file name if necessary, and click **Save**.

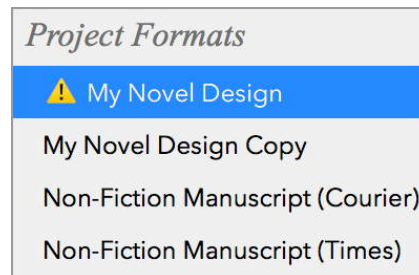
## 23.2.6 Deleting a Format

You can remove formats from the sidebar that you no longer need:

1. Select the format to remove, in the sidebar itself.
2. Either right-click and select “Delete Format” from the contextual menu, or click the ☹ button and select it from there.

This will only delete the copy for the format that you select. Any other copies that have been saved individually into projects, or into the “My Formats” global list will remain.

## 23.2.7 Resolving Duplicate IDs



**Figure 23.2** Duplicated formats will be indicated as needing resolution with this icon.

Duplicating Formats from within Scrivener is safe and often useful to do. Problems can arise if the files used to store these formats are duplicated outside of Scrivener. This could happen if the associated file is restored from a backup and one chooses to keep both copies, as a result of sync conflicts, or just duplicating the files yourself, in the Finder.

When two or more formats are using the same internal ID, Scrivener will place an “alert” icon beside the affected formats (Figure 23.2). You should resolve the ID clash sooner than later:


1. Right-click on the Format with an alert icon, or with any format selected use the ☹ button in the format sidebar footer area, and select the “Fix Duplicate IDs...” menu option.
2. The following dialogue will show you which formats are currently duplicated. When you click the **Fix** button, the listed formats will have their internal IDs reset.

This may cause projects that were using those formats to lose their Section Layout assignments. This can be easily resolved by Assigning Section Layouts ([subsection 23.3.3](#)) again.

If that may prove too much of a hassle, you might prefer to resolve this problem back where it began, on the disk. Dragging the duplicate format file (.scr-format) to the Desktop and then using the import feature ([subsection 23.2.5](#)) will automatically assign a new internal ID to the imported format, leaving any existing associations between the original format and the projects that use it intact.

## 23.2.8 Importing Legacy Presets

You can import old compile presets you created in the past, and even compile settings from upgraded projects, into the new v3 compile system:


1. Click the  button in Formats footer bar.
2. Select the “Import Scrivener 2 Preset...” command.
3. Choose from one of the three possible options:
  - a) Select a saved preset from the “Shared Scrivener 2 Presets” list.
  - b) Click the **Import Other...** button if the preset was stored as an exported file, navigate to the file on the disk and select it.
  - c) If the project you are working from has been upgraded from the previous version, then its compile settings will be provided for your convenience as “Last Settings Used”.
4. Click the **Import** button (or the **Open** button if you’ve selected an external file).

The format designer will be opened with the imported settings all ready for inspection and adjustment. Once you are done confirming the settings, click the **Save** button. The format will now appear in the “Formats” sidebar, ready for use.

## Cleaning Up Old Presets

Here are some tips for tidying up the format to best practices in v3:

- If you intend these settings to only be available to the current project, use the **Save to** dropdown at the top of the window to select “Project Formats”.
- If the preset depended upon the “Quick Font Override” setting in the legacy version, this is no longer done at the format level, but rather as a per-project choice in the compile overview screen.

- The legacy version of Scrivener had no concept of named section layouts, rather strictly using folder, file and file groups along with their indent levels to achieve a similar effect. If you click on the Section Layouts compile format pane you could go in and rename these generated layouts to something more meaningful, such as “Chapter Heading”, instead of “Folders (Level 1+)” and so forth.
- While there, it is also worth noting that **Override text and notes formatting** is now an option available to *each section layout individually*, rather than a global setting. If you used this checkbox in v2 then all section layouts will have the checkbox enabled, causing the compile settings to act as they did before. However many of the additional options that were used to include/exclude particular *types* of formatting have been removed; they are now much more efficiently handled by the stylesheet system. Instead of preserving alignment so as to keep figure captions centre-aligned, you can now use a dedicated “Caption” style.
- Imported formats will by default be available to *all* file types (such as PDF, ePub and so forth), since that is how presets worked in older versions. If you intend to use the format with only certain types (like PDF or ePub), you could click the  button in the format pane header bar to narrow its scope. This will limit the choices available in the dropdown menu to its left, and whether this format will appear at all when selecting file types back in the compile overview screen.
- For a more detailed guide, we have prepared a tutorial project that you can download [from our website](#).

You should find many of these panes will be familiar from the old compiler's option panes, but should you require assistance with any of them, refer to the The Compile Format Designer ([chapter 24](#)).

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## 23.3 Layout Preview

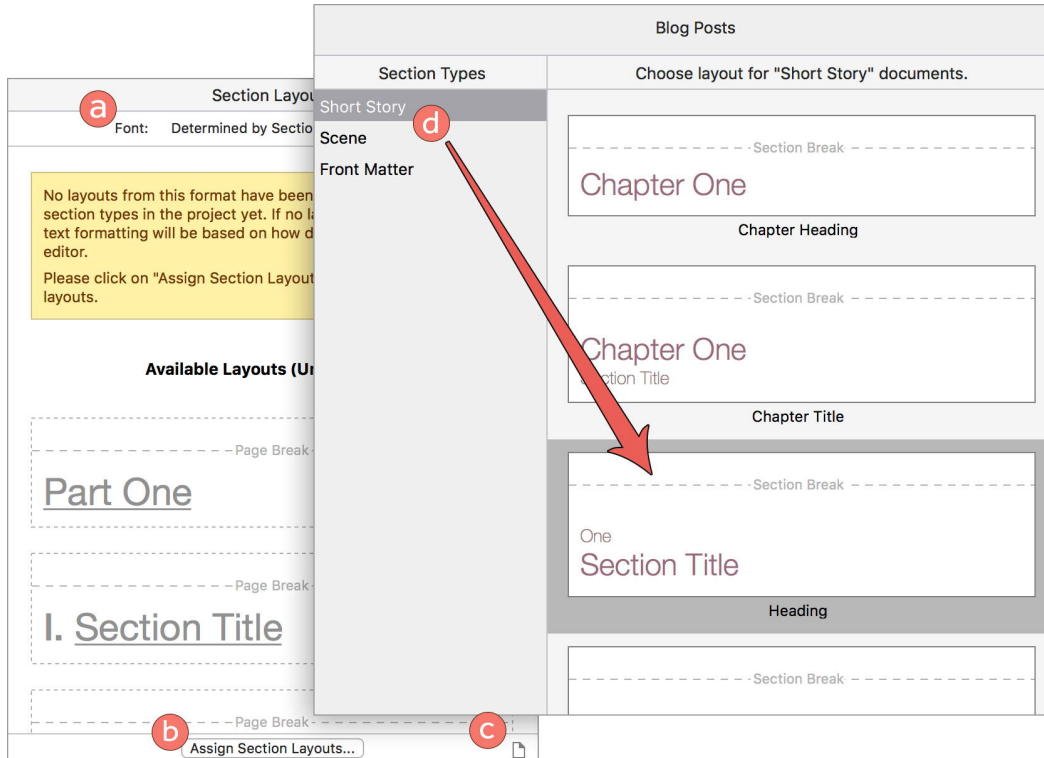
The next major component falls within the centre column of the compile overview screen. It contains a stack of tiles depicting how the various different types ([section 7.6](#)) of document in your draft—what you can see listed in the Contents list to the right—will be formatted.<sup>5</sup>

You can think of what happens within this middle column as how your content will be formatted into various roles. Where the compile *Format* states in

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<sup>5</sup> You can click on any preview tile in this column to highlight which sections will be impacted in the contents list to the right, and hover the mouse over the tile to read its name in a tooltip.

general terms what these roles should look like, *Section Layouts* provide the specific choices for what such things as a chapter heading should look like—its font design and numbering style—and most importantly, which types of content in your project should use that look.



**Figure 23.3** Section Layouts are how you choose the appearance and function of your document.

In [Figure 23.3](#) we can see several types of major section headings presented by the format, and have chosen one suitable for numbering and printing the name of each short story, as well as inserting a customary page break.

Let's take a look at the various settings that will influence how your document looks:

- At the very top of the preview column is the **Font** chooser. Use this to globally override the font for the selected format (including even such things as page headers and footers), or instead to let each individual section layout determine font settings.
- The **Assign Section Layouts...** button is what brings up the interface shown on the right side of the figure. Use this to change how the components of your project will look when compiled. If you have a Touch Bar, this function is also featured as a convenient button from the overview screen.
- Click the page layout preview button to view a preview of how this Format will lay out the headers, footers and margins. You can change paper size



and margins in the **File ▶ Page Setup...** tool, so if you have to leave compile for a moment to change that, you might want to hold down the **Option** key and click on the **Save** button so as to not lose your settings.

- d) Within the “Assign Section Layouts” interface, we can select section types from the sidebar and then click on preview tiles on the right hand side to choose a look for that particular type of document. In this case we have chosen to print our “Short Story” type documents with a page break, an automatically generated number and finally the name of the short story on a second line.

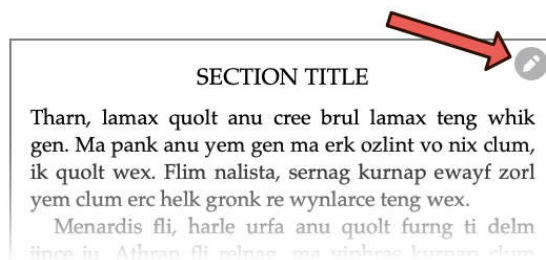
### 23.3.1 Choosing the Global Font

Many formats will include their own font choices for the text, headings and so forth. These will be used so long as the **Font** setting along the top is “Determined by Section Layout”.

When selecting a specific font, the scope of this setting is quite simple: it impacts everything, from the page number on down to section types that would ordinarily leave the text formatting alone—even styles from the editor that would otherwise declare a font family will be overridden by this setting. If you need a finer level of control (perhaps you want chapter headings to use a different font than body text for example) then you will need to edit the format itself.

### 23.3.2 Editing Section Layouts from the Overview

If this is your first time coming to grips with the compiler, you may want to bookmark this spot for later. The preview tiles that you see in the column represent Section Layouts, which are themselves completely configurable, and can be edited straight out of the preview list.



**Figure 23.4** Click the “pencil” icon to edit this layout, or double-click anywhere on the tile.

1. Hover the mouse over the preview you’d like to adjust.
2. Click the “pencil” icon in the upper right corner of the tile (Figure 23.4), or double-click anywhere within the preview tile.

3. The format will be duplicated if necessary, and you will be taken to the Section Layouts tab of the Compile Format Designer window ([section 24.2](#)) with this specific layout selected for you.
4. When you've finished making your adjustments, click the **Save** button to be returned to where you were in the compile overview screen.

### 23.3.3 Assigning Section Layouts

When switching to a format not yet set up to work with your project, you may get a yellow warning above the preview tiles ([Figure 23.3](#)). This merely means that none of the section types in your project have been connected with a particular look in the Layouts section.

It is perfectly fine to compile in that state; the look of the format will not be used but other aspects of it may be, such as paper size, footnote settings and so forth. To more fully take advantage of a format you will want to tell the compiler what the components of your draft should look like. Click the **Assign Section Layouts...** button along the bottom of the column to get started.

The left side of the layout assignment window lists all of the Section Types you are currently making use of, in the order they are defined within the Project Settings: Section Types tab ([section C.2](#)).

- Click on a Type in this list to see which Layout it is assigned to. You can change the assignment or make a new one by scrolling to different tiles in the right column and clicking on the desired look.
- To make batch assignments, select all of the types you want to assign in the left list using **Shift** and **Cmd** clicking to add to the select, and then click on the tile these types should all be formatted like.
- If you know the name of the layout you want, you can also right-click on a selection of types and select the layout to be used.
- The special “As-Is” layout at the bottom of the list is a way of saying a type of document shouldn't use any special formatting. The contents of it will be passed directly through to the compiler, with no additions, embellishments or adjustments (though separators, like page breaks or other markers, may still be inserted around the items).
- Section Types that are not in use by any binder items will be unlisted by default. To access them, click the **Show Unused Section Types** button in the footer bar of the left sidebar.
- If you don't find quite what you are looking for in the list of available Layouts, you can edit them from this screen as well, using the same procedure described before ([subsection 23.3.2](#)).

Once you have everything “wired up” the way it should be, click the **OK** button to return to the compile overview screen. Your updated preview tiles should now be listed in the centre column.

### Keeping Preview Tiles Tidy

In projects that feature a large number of section types and layouts, you might be able to trim down how many preview tiles you have to scroll through in order to get an overview of the document look. Adjacent Types that use the same Layout will be grouped together as one tile instead of each having their own individual preview tiles. E.g. with three section types called “Definition”, “Glossary Entry” and “Figure Reference” all using the same section format called “Hanging Title Block”, you would see that layout preview tile only once in the overview screen. You can change the order of types in the Section Layouts tab, in **Project ▶ Project Settings....**

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## 23.4 Compile Options

Returning to the main compile overview screen, the right-hand column is separated into several different tabs that will change depending on what type of file you are compiling. With only a few exceptions, the settings contained within them apply globally to your project, rather than being specific to a file type or Compile Format:

1. The first tab, starting from the left, is the Contents tab ([subsection 23.4.1](#)). Here is where you adjust which pieces of the binder to include in your compiled document.
2. The second tab is where you will set up metadata ([section 13.5](#)), such the title of the work, the author(s) and so on.
3. The General Options tab ([subsection 23.4.3](#)) contains all of those fiddly settings you might need—such as whether footnotes should be at the bottom of each page or gathered together as endnotes, if proofing markings should be included or stripped out, and so on.
4. The Project Replacements tab ([subsection 23.4.4](#)) can be thought of as a list of search and replace commands that run whenever you compile, without modifying the original text.
5. The Cover tab ([subsection 23.4.5](#)) is where you can set up the cover image and catalogue thumbnail used by ebook and PDF formats.

6. Ebook and Pandoc generated DOCX files also come with an automatically generated table of contents page by default. The Table of Contents tab ([subsection 23.4.6](#)) is where you can adjust whether and how this element should put together.

All of the options in these tabs are saved into the project automatically whenever you compile or if you save your settings. They cannot be transferred to other projects, so if you strike upon a combination of settings you would like to use as a starting point in the future, consider creating a project template ([subsection 5.4.3](#)).

### 23.4.1 Contents Tab



**Figure 23.5** The “Contents” compile settings tab.

The Contents pane is used to establish which parts of the project will be used to create the compiled document. The component with the most immediate impact is the **Compile** dropdown at the very top of the list, marked (a) in [Figure 23.6](#). This sets the compile group, from which all of the other options operate as a basis.<sup>6</sup> By default the “Draft” folder selected, and all material found within that folder will be compiled.

In cases where you want to export only a portion of the book, or are working in a project that includes several editions or articles located in the draft folder, you can use this dropdown to select only a portion of the draft. The list will be shortened to only showing the selected item’s descendants.

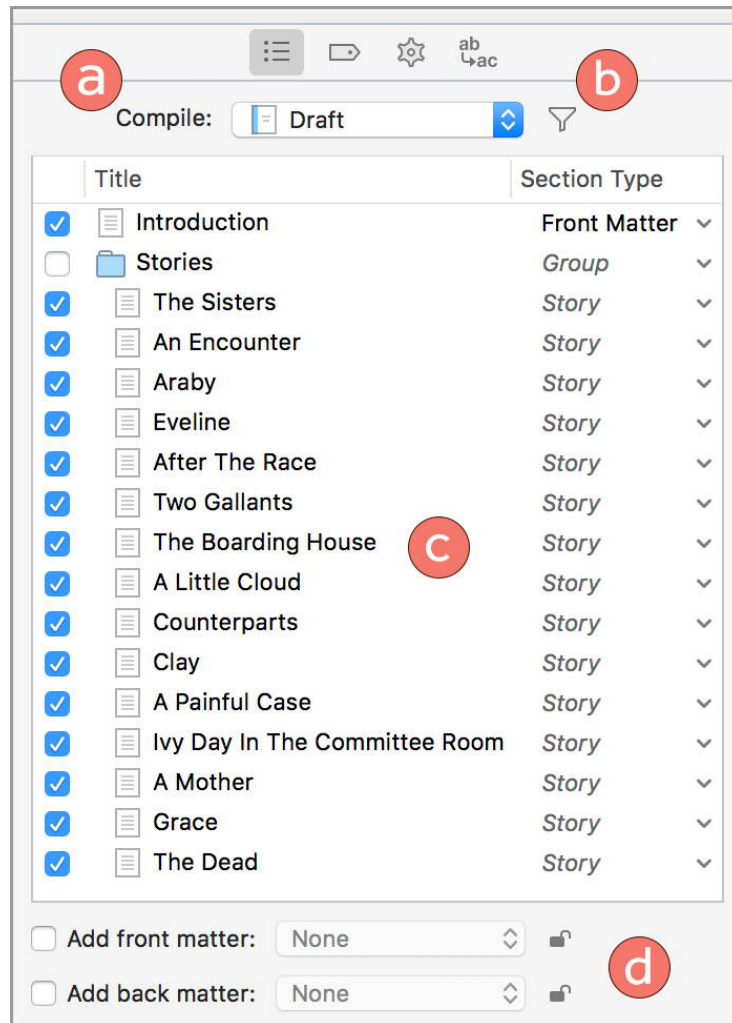
In addition to selecting a subgroup of the draft folder, there a few special utility selections at the bottom of the dropdown menu that are worth noting:

- *Current Selection*: the selection from the active group view you were using prior to entering compile will be used. E.g. if two cards are selected on a corkboard or outliner when you enter compile, those two cards will be provided as the compile group with this setting.

In all other cases the binder selection will be used, even if it is not focused.

- *Search Results & Collections*: the contents of the selected collection or the current search results list will be used to populate the compile group below. This will always result in a flat list, since these are flat lists themselves. As with selections, collections can also be filtered.

<sup>6</sup> This is also used to determine targets and statistics in the main project, in most cases.



**Figure 23.6** The compile contents list is used to establish the material that will comprise the final document.

## Compile Group Options

Depending upon the type of choice made with the **Compile** dropdown menu, secondary options may appear at the top of the content list.

Two additional settings will be provided whenever an individual container from the “Draft” folder is selected:

- I. **Treat compile group as complete manuscript:** ordinarily when a portion of the draft folder is selected for compile, counter numbering will be displayed as though the rest of the manuscript existed; chapter 13 will remain 13. When this option is enabled, the smaller portion you selected will be treated as though it were the entire manuscript. All counters (either in compile settings or in the draft itself) will start at 1.

This is thus useful when hosting several complete and self-contained works in the same draft folder, and using this setting to switch between

them.

2. **Include text of containing group:** enabling this adds the selected container to the compile group. This can be useful if the container itself is meant to generate meaningful information, like a chapter heading, page break or introductory text.
3. When using the “Current Selection” compile group, you will be provided with an option to **Include subdocuments**. With this, adjust whether your selection should automatically include everything *beneath* the selected items, too. This is especially useful if you wish to compile two folders with many subdocuments. You can just select the two containers, open Compile, tick this option and be done with it.

## Content Item List

The item list is the large table in the middle, marked (c) in [Figure 23.6](#), displaying the contents of the current compile group. In the provided example the “Draft” folder has been selected, and so the entire Draft contents are revealed in the list below it. The items in this list will be indented just as they are in the binder, hierarchically.

There are three columns within the table. It is usually a good idea to initially scan these columns to make sure everything will act in the manner you expect it to:

**Include** The first column contains checkboxes that correlate to the inspector option, **Include in Compile**. When an item is unchecked it will not be used in the final product unless settings are altered in the filter popup ([section 23.4.1](#)). This is generally used to create static exceptions for items which will rarely or never be a part of the compiled product. For quickly filtering or selecting the scope of a compile to for example print out one or two chapters, it will most often be more efficient to use the compile group selector or filters.

**Title** The visible name of the item in the Binder. This may be used in the compiled output depending upon the format settings for its corresponding section type. For example, it might be that folder names are included as part of a chapter or part break.

**Section Type** Displays the type of document the associated item is, and allows you to change that association right in the contents list—as described in Applying Section Types Manually ([subsection 7.6.2](#)). This often determines how the item will be formatted, as previewed in the centre column of the compile overview screen.

If you find yourself changing many of these by rote, it might be a good idea to adjust how these are automatically assigned in the Project Settings: Section Types tab ([section C.2](#)).

Bulk changes can be made within this list:

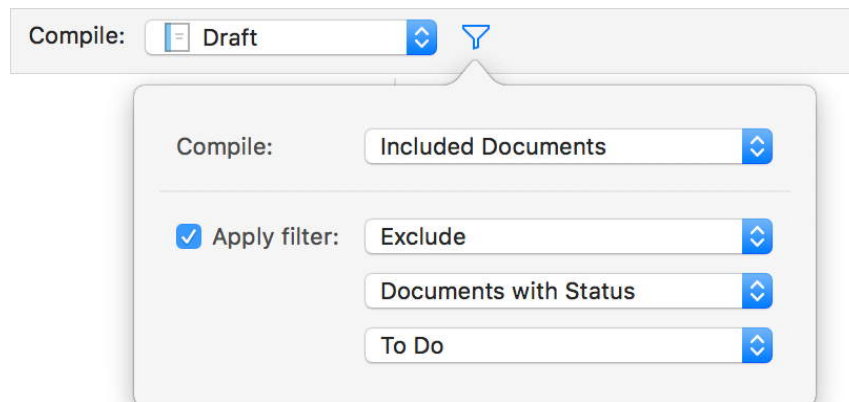
- Hold down the **Opt** key when clicking on an “include” checkbox to toggle all boxes in the same manner (on or off). When done within a selection, only the items within the selection will be toggled.
- Individually or with multiple items selected, right-click to change either the inclusion or section type assignment.

### Upgrading from Scrivener 2

Looking for the old **Page Break Before** or **As-Is** checkboxes? These options have been removed from the software entirely, as what they provided is now served by assigning types of documents to section formats that generate page breaks on their own, or display content as-is, as part of their design. This is a logical change in that if something should be generating a page break, it probably ought to have a section type appropriately set for it, like “Chapter” or “Front Matter”. Meanwhile whether a section of text should print as-is, like an interlude between chapters, should perhaps be referred to as an “Interlude” and be set to format “as-is” in the centre section layouts column.

## Filtering

Filtering makes it possible to supply certain criteria by which the compile contents list will be modified. E.g. you can have it only include those items which have the “Red” label set to them, or conversely, remove all items from the list marked with “Red”. Start by clicking the filter button, marked (b) in [Figure 23.6](#), alongside the main **Compile** group dropdown.



**Figure 23.7** The “Filter” button reveals options for further refining the compile contents list.



If when you first load up compile and are puzzled by an empty list or one that appears to be missing chunks of text, check the Filter options and make sure nothing has been left set there from a prior session.

At the top of the popover you will be provided with a choice for how to treat the **Include in Compile** checkboxes, controlled either by checking items off in the Contents list right here, or in the inspector and outliner in the main project window. There are three choices available:

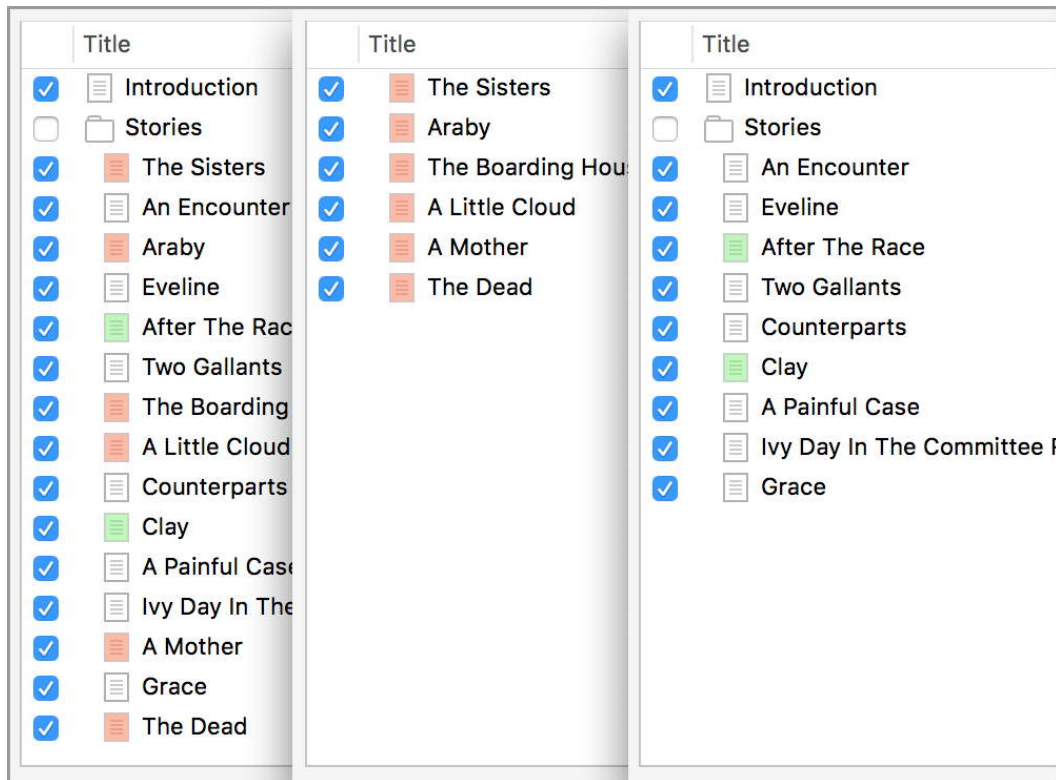
- *Included Documents*: this is the default and logical behaviour. If something is checked it will be included in the compiled document, if not it will be excluded.
- *Excluded Documents*: all documents ordinarily set to be included will be left out, and only those excluded documents will be compiled. If you use this feature to keep notes alongside your main text this can be a useful way to only export those notes.
- *All*: the checkbox will be disregarded outright and all documents shown in the compile contents list will be included.

To enable further filtering, first tick the **Apply filter** checkbox. Filters can be defined as either “including” or “excluding” matches, set with the first dropdown menu, the effects of which can be seen illustrated in [Figure 23.8](#), with the leftmost frame showing the unfiltered contents list:

- *Include*: Everything matching the filter settings will be included in compile, non-matching items will be removed. Refer to the middle frame in the figure to see what this setting looks like, when choosing the “Red” label to filter by.
- *Exclude*: Everything matching will be *removed* from the list. The right frame in the figure demonstrates a list with all “Red” items excluded.

The second dropdown specifies which type of attribute or metadata to filter by. There are four core options always available:

- *Documents with Label*: documents matching the specified label will be matched and handled according to the logic in the first dropdown menu.
- *Documents with Status*: as above, only using the status metadata field.
- *Documents in Collection*: items found in the specified collection will be filtered.
- *Documents in Current Selection*: as with the main compile group setting, this will use the current selection that has been made in the project window, prior to opening the compile interface. Since this method has no optional behaviour, the third selection dropdown will be removed.



**Figure 23.8** Filtering by “Red” produces either a list of only red marked items (centre) or a list with no red marked items (right).

- Below these core choices, any custom metadata found within the project that is of either a List of Checkbox type will be provided for you.

Lastly, a third dropdown menu will appear at the bottom of the filter popup if relevant. The contents of this will vary depending on the choice made above:

- Labels, list-style custom metadata and Status will provide you with all of the possible assignments that can be made with these fields. For example, with default settings the “Label” choice would include selections like “Red”, “Orange” or “No Label”. The “Status” choice would provide options such as “First Draft” and so on.
- Checkbox-style custom metadata will give you a “Yes” or “No” choice.
- When filtering by collection, a list of every collection in the project, whether they be standard or generated by search results. The basic Search Results list is also available from this menu. When using these dynamic settings, one could see a different result every time they compile.

## Front & Back Matter

Main matter (or body matter) is a publishing term for the core content of a book, from the first chapter to the last. Front and back matter are defined as the ma-

terial preceding and following the main content of a book. Front matter (also known as preliminaries or just prelims) will typically include everything from the title page and copyright page to the preface and introductions. In print publishing, this often includes a different header and footer style, such as Roman numerals for the page numbering. Back matter (also known as end matter) traditionally includes such things as epilogues, glossaries, appendices, bibliographies, author bios and advertisements.

As it becomes increasingly important to be able to deliver material in multiple formats, swapping out these peripheral materials dynamically, depending on your compile target may be necessary. You could need, from one single project, a PDF delivered to a Print on Demand service, an ebook published to Amazon or Kobo or even a proofing instruction page for your editing and proofing team.

The specifics of these can vary in that with print formats, you might want a table of contents that uses page numbers, but in the ebook you won't have page numbers, or you might not even want a table of contents at all. With back matter, different sets of links to store pages for buying additional novels from the author might be needed depending on whether the book is being uploaded to Amazon or Kobo.

The front/back matter features only work when the following conditions are set in the Contents tab of compile overview. In all other cases the output will be presumed as only a partial manuscript, and thus adding full book material would be undesirable:

- The entire draft folder is selected as the compile group in the dropdown at the top of the contents list.
- If a subfolder of the draft is selected and the **Treat compile group as complete manuscript** option is enabled.

### Additional Formatting Impacts

Besides swapping out sets for different output purposes, these features will also commonly be used to impact other compile settings:

- When creating a Mobi file the compiler will set the point where the book first opens to the first section following any front matter material—traditionally at chapter one. This can be altered in the General options tab of the compile overview screen ([section 23.4.3](#)).
- For formats with a page header or footer, different settings can be applied to front and back matter independently, in the Page Settings compile format pane ([section 24.20](#)).
- Placeholders that print statistics, such as word and character counts, will by default exclude material found in the front or back matter. This can be changed in the Statistics compile format pane ([section 24.16](#)).

- The **Document suffix**, an option of the compile format, in the Text Layout format pane ([section 24.6](#)), which can be used to insert phrases like “The End”, can be optionally inserted before the back matter begins.

### Setting Up the Folders

The Front & Back Matter features, marked (d) in [Figure 23.6](#), make it a simple task to swap out sets of files depending on what your current compile file type is. To get started:

1. Create a folder in your binder that will contain different sets of front or back matter. In some cases you’ll want to put separate subfolders within this, one for each type of front matter you’ll need, such as “Amazon”, “PDF” and so forth.
2. Move your title pages and other materials into these folders. Each folder needs to be a self-contained set of front and back matter. If you want to use the same title page for multiple formats, consider making use of the `<$include>` placeholder ([subsection 10.1.5](#)).

#### Want to see front matter in action?

The “Novel” project template provided with Scrivener demonstrates a possible setup with a group of individual front matter folders for use with corresponding publication outputs, such as standard submission or self-publication with ebook and PDF.

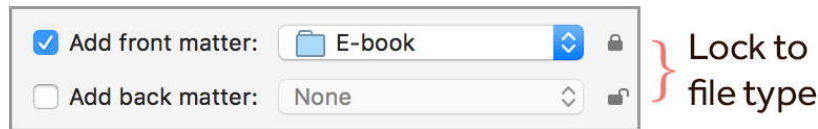
Selecting a folder as a front/back matter folder will transpose all of the contained items (and descendants) to the very top or bottom of the compile contents list respectively, without altering the actual order of these items in the binder. This will happen no matter where the source folder is located (to avoid confusion, you shouldn’t place these folders inside the draft folder itself).

### Locking Settings to File Type

As noted above, it will often be desirable to have different sets of front and back matter depending on which type of file you are creating. By default, when you set the contents pane to use a particular front/back matter folder it will stick no matter which choice you make with the **Compile for** dropdown at the top of the overview screen.

To lock a front/back matter folder to the current file type:

1. Set the folder(s) you want to use with this file type (TXT, DOCX, ePub, etc.). You can also choose to *not* use one of these settings, by disabling the checkbox to the left.



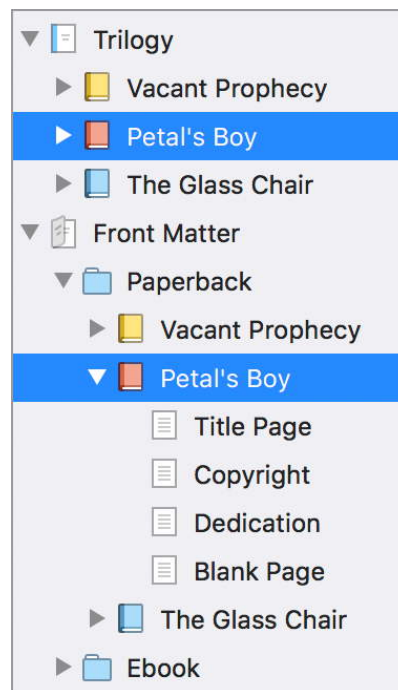
**Figure 23.9** The “ebook” front matter folder will always be used for the selected file type.

2. Click the lock icon to the right of the folder selection dropdown, as indicated in [Figure 23.9](#).

File types that have not been locked to a particular front/back matter folder will always go on using the same common setting from whatever you used last.

### Linking Front/Back Matter to Compile Groups

You can set the compiler to automatically select a front matter folder based upon the current compile group, so long as the group is itself set to function as a complete manuscript ([section 23.4.1](#)). This can be useful if you use Scrivener to write multiple works into one project, where each work is its own compile group, with its own front/back matter.



**Figure 23.10** Matching front/back matter folder names will promote automatic selection when switching compile groups.

1. In the binder, create a set of subfolders beneath the main front/back matter folder that match the name of the main folder used to designate the work being compiled.

E.g. In [Figure 23.10](#), we have a trilogy in the Draft folder, with the Paperback front matter files sorted into matching subfolders.

2. In the compile overview screen, designate the main front/back matter folder that contains the paired subfolders. In our example, we would select the “Paperback” folder.
3. From the compile group selection dropdown, select one of the novels. If “Petal’s Boy” is selected as our compile group, and **Treat compile group as complete manuscript** is enabled, then Scrivener will automatically select the “Petal’s Boy” front matter subfolder for you.

This capability can be combined with locking front/back matter folders to file types. Continuing on in our example, we could lock the PDF type to the “Paperback” front matter folder, having it automatically switch between the three subfolders depending upon which novel we compile. When we switch to ePub3, the compiler first switches to the “Ebook” group and then checks within that group for a “Petal’s Boy” subfolder, ultimately selecting it for the ePub.

## 23.4.2 Metadata Tab



**Figure 23.11** The “Metadata” compile settings tab.

Metadata in this context refers to information that will be embedded in the file that is compiled, using whatever properties or fields the selected file type has at its disposal for recording metadata. This information can sometimes be used by file managers and to enhance search tools like Spotlight.

This pane also sets information that will be used by placeholders that insert the author name and book title into various places, such as the page headers, with some formats. The contents of this pane will change a good deal depending on the file type chosen, but the basic placeholder settings are available to all file types.

When creating a new project, most or all of these fields will be filled in for you, using what information Scrivener has at its disposal. If the fields are left empty, they will become “automatic”, and the information used will be printed in light grey placeholder text.

### Book and Author Information

**Title** Use this to set the formal title of your work; it will be used wherever the `<$projecttitle>` placeholder has been typed in. If no title is supplied, the software will use the filename of the project, on the disk.

**Abbreviated Title** Especially useful in headers, long titles often need to be shortened to fit in the header area, so you can optionally use the placeholder, `<$abbr_projecttitle>`, to display a shortened version of it. If nothing is supplied here, it will use the **Title**, above.

**Author's Full Name, Forename and Surname** The first field can be used to add multiple authors if necessary. Separate each author name with a semi-colon. The `<$fullname>` (or `<$author>`) placeholder will insert this information into the book, and the `<$forename>` and `<$surname>` (`<$firstname>` and `<$lastname>`) can also be used if you find those more comfortable) placeholders will be used elsewhere. If nothing is supplied here, either your system user name or the information provided in the General: Author Information settings pane will be used ([subsection B.2.3](#)).

## Word Processing and Web Metadata

The RTF, RTFD, DOC, DOCX and ODT formats all support additional fields that can be saved into the properties of the file (accessible from most word processors). You may need to consult guidelines for how they should be used if submitting documents to a central repository.

When used with HTML files, the information supplied here will be inserted into the document header, which will be used by search engines to optimise discovery of the page.

The **Keywords** and **Subjects** fields should have each value separated by a comma. Otherwise all fields are freeform.

## Ebook Metadata

The additional fields provided to ebooks will be inserted into appropriate book description fields, often available to e-readers to display in whatever manner they provide, and used to automatically sort the book within electronic catalogues. Most of the fields allow for freeform entry; you should consult with your publisher or distributor on best practices for using these fields.

**Contributors** As with the **Authors** field, each person's name should be separated with a semicolon. Amazon's conversion utility does not recognise multiple authors, so only the first name contained within a bubble will be applied to the book. To ensure all authors are listed in the Kindle book, refrain from using semi-colons to separate the names, or add them later with a tool that is capable of adding multiple names to the .mobi file you've compiled.

**Subjects** A listing of topics or subjects the work covers. This is not commonly used in fictional works. Each subject should be separated with a comma.

**Description** Typically used to store the marketing blurb, or a short description of the work. You may make use of the "`<$include>`" placeholder in this



field, to pull such material from where it might be printed otherwise in the book]Including Text From Other Documents ([subsection 10.1.5](#)).

**Date** In most cases, to conform with standards, you should use YYYY (1914), YYYY-MM (1914-06) or YYYY-MM-DD (1914-06-27) date formats.

**Language Code** Provide the standard ISO code of the language the book is published in.

**Use custom book ID** A randomised unique number will be generated if you do not provide one yourself. In most cases you will want to use some internationally recognised identified for your book, such as the ISBN.

If multiple authors or contributors have been accredited in the fields above, the **Author and Contributor Details...** button can be clicked to assign roles (“aut” stands for “author” and the rest are set to “default”), with freeform filing information.

## Fountain and Markdown-based Metadata

The Metadata pane for Fountain and the Markdown-based file types provides a front-end to the preliminary metadata block found at the top of these kinds of files.<sup>7</sup> Pandoc format uses a [YAML](#) formatted block, which for the purposes used in Scrivener matches the format used in MultiMarkdown and Fountain’s metadata block. Each line in the block is prefaced by a metadata key, such as “Title”, followed by a colon, some whitespace and the value.

By default, new projects will have both a Title and Author key added for you, using placeholders to insert the actual information (taken from the general metadata fields above). Thus the starter metadata for a new document, when compiled to a Markdown or Fountain file, will look like the following (with the placeholders evaluated to the project name and user account name by default):

```
Title: <$projecttitle>
Author: <$author>
```

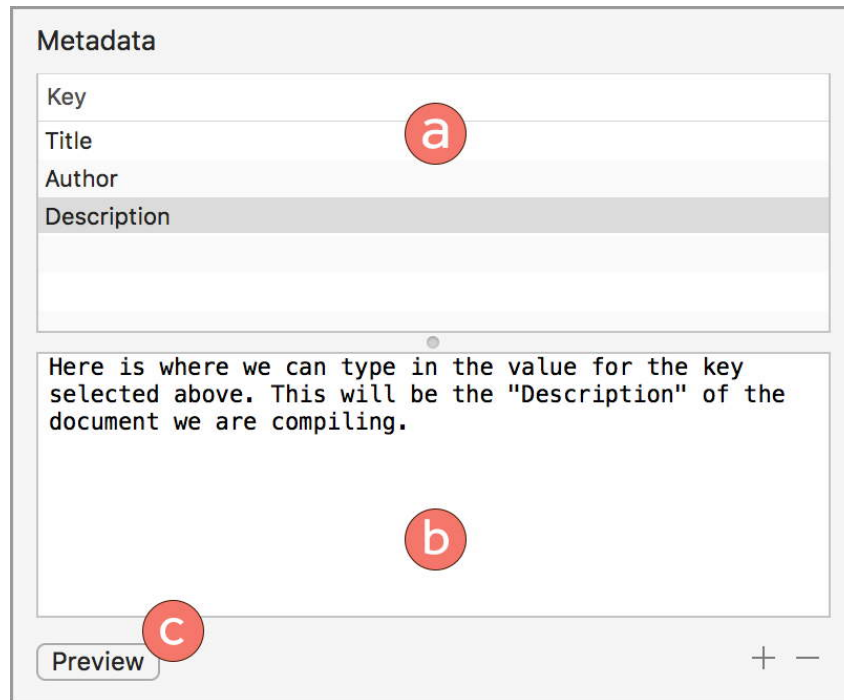
What you type into the text area, marked (b) in [Figure 23.12](#), will be printed into the compiled document verbatim. All rules pertaining to the metadata syntax should be followed. Empty lines in this area may cause the metadata block to prematurely abort.

To create a new field:

1. Select the row you would like to insert the new key after.

---

<sup>7</sup> Some software may refer to this block as the “frontmatter”, but we use that term by its literary definition to refer to material, such as the table of contents and dedication page, that falls before the main matter.



**Figure 23.12** The Fountain and Markdown-based metadata panes make it easy to manage fields for these document types.

2. Click the **+** button in the lower right-hand corner of the metadata area or press the **Return** key.
3. A new row will be created in the area marked (a) in the figure. Type in the name, whether it be to conform to a functional field or one of your own.
4. Click into the text area marked (b) to type in the value. You can use placeholders here to extract information dynamically from the project, current date and so on.

Individual fields can be arranged by dragging and dropping them in the key list of the upper half of the metadata area.

For further information on how metadata should be used, particularly for best practices on where best to put different keys; into the compile format settings ([section 24.11](#)), or as a “metadata” file in the binder itself, refer to MMD & Pandoc Metadata ([section 21.6](#)).

### Working with Existing Metadata

If you already have a metadata block from an existing document, you can copy and paste it into your settings in their entirety rather than creating each field by hand and transferring the values over one by one:

1. Click into the Key area, marked (a) in the figure.

2. Use the standard paste (⌘V) command to paste a properly formatted metadata block into the compile settings, having them converted to individual key rows.

Likewise, you can select metadata keys from this table and use the standard copy command (⌘C) to place a valid metadata block on the clipboard.

### 23.4.3 General Options



Figure 23.13 The “Options” compile settings tab.

The third tab in the compile settings area contains settings for adjusting the behaviour and appearance of text and its formatting, cleaning up the document of struck-through text, hyperlinks, unnecessary whitespace or refitting images to the paper size, inserting proofing aids and so forth. Many settings are only relevant to certain types of files, and thus the options you find here will depend greatly on the “**Compile for**” setting at the top of the compile overview screen. If you do not find what you are looking for in this list (such as whether italics should be underlined), chances are you will find them in the compile format itself ([chapter 24](#)).

#### Common Settings

There are a few options in this tab that pertain to all types of documents that can be produced with Scrivener, or are used by a large majority of them.

**Remove footnotes** The exported manuscript will have all footnotes (inline or linked) stripped out.

**Remove comments** All inspector comments will be stripped out. When disabled, comments will be included in accordance with the current compile format, or to a format most suitable for the type of document being exported (for example, with the rich text formats you might get a “margin note” or comment box in your word processor when opening the file).

**Remove annotations** All inline annotations will be stripped out. As above, when this option is disabled the annotations will be formatted in a manner suiting the type of document and the compile format settings.

**Delete struck-through text** Any text that has been struck-through in the output will be stripped out of the compiled copy. If you use these marking for editorial purposes, to “soft delete” text, this is the option to use to implement those edits. When disabled (as it is by default), the text will be formatted as struck-through text if the document type supports that form

of formatting. They will otherwise look like ordinary text in formats like plain-text.

**Remove trailing whitespace from documents** This option makes it viable to not worry so much about whether or not there are empty lines at the bottom of individual chunks of text in the binder. They will be stripped out, so that only the separators inserted by the compile format will be present between chunks of text. If you use empty lines for some important purpose, you'll probably want to leave this option off.

**Insert links back to Scrivener in each section** Using whatever mechanism is most appropriate for displaying a hyperlink in the target file type, Scrivener will insert a special link at the top of every chunk of text used to build a compiled document, pointing back to that item in the project itself. This link will work anywhere from the same machine that project is located on. You can for example compile to PDF and use your favourite PDF reader to proof, clicking on these links to load sections up in Scrivener when coming across areas that need fixing. Read more about this capability, and other Proofreading Tools ([section 20.3](#)).

This and the following options are not available to the ebook and Final Draft document types.

**Insert unique document identifiers only** This subsidiary option to the prior will not create a usable link in the exported file. However it will print the internal identifier (in UUID format) for the binder items used to build the compiled document. When importing such files back into Scrivener, it will scan for text that matches this notation and build document links based upon them. This is a safer approach to distributing proofing copies to readers, as some software might disturb the hyperlinks inserted using the option above—as well it will work even with formats that do not support hyperlinks natively, such as plain-text.

## Rich Text Options

Unless otherwise noted, in this case, “rich text” refers to not only the word processing document formats (such as RTF, DOCX and ODT), but ebooks, HTML, PDF and Print.

**Export inspector/inline footnotes as endnotes** These two checkboxes, one for footnotes linked to the inspector and the other for footnotes typed directly inline into the text, will toggle whether or not that particular style of footnote will be exported as *endnotes* instead. The manner and numbering style in which this is done will be determined by the compile format in use.

**Remove highlighting** Text highlights will be stripped from the compiled document, save for cases where they are used for dedicated purposes, like indicating commented text.

**Remove text color** Likewise, this option will strip all custom colouring from the compiled document and force all text to default (black in most cases), without exception. This will also remove any revision markings that have been made during drafting.

**Remove all hyperlinks** Strips out all hyperlinks from the produced document. If you primarily use links as a form of internal referencing, rather than as something you would like the reader to be able to jump from one section of the book to another with, you will want to use this option. It will also be useful when printing to paper, as you'd likely not want light grey underlined text wherever a link appears.

**Convert Markdown to rich text in titles and synopses** Simple [Markdown](#) for `**strong**` and `*emphasis*` (or `_emphasis_`) found within titles or synopses will be converted to bold and italics respectively. When using the underscore formation with the **Convert underscores to underlines when converting Markdown** setting in the Sharing: Export Setting tab ([subsection B.8.2](#)), then the end result will be formatted underlines rather than italics.

**Convert MultiMarkdown to rich text in notes and text** That that write using basic MultiMarkdown syntax (some Pandoc may also work, so long as it overlaps with MMD), can tick this to use one of Scrivener's own native formats, rather than one of the dedicated Markdown compile file types.

Excepting those features Scrivener can convert to Markdown syntax (like images), this option requires a project to be written with proper syntax throughout. That includes avoiding rich text *conventions* as well, such as not properly double-spacing between paragraphs, as Markdown requires.

Not all forms of Markdown syntax are supported, as the converter is not a full Markdown processor. In most cases a far superior result will be achieved using native Markdown conversion tools.

**Scale images to fit page width** Available to the word processing formats, images in your text editor will have their dimensions adjusted to fit within the set paper and margin settings rather than overflowing the page. In nearly every case it will be better to actually resize those images graphically, so that they print the way they are supposed to, as this will reduce processing overhead and result in documents that are only as large as they need to be.

**Convert document links to link back to Scrivener** Available to PDF and word processing formats, all document links (those that point from one section

of text to another within the binder) will be converted to links that point back to that chunk of text in your project, rather than links that navigate you around within the document you exported. Read more about this capability, and other Proofreading Tools ([section 20.3](#)).

**Convert linked images to embedded images** For the RTFD format alone, if you have used linked images in your project text ([subsection 15.6.4](#)), this setting will cause the original resources to be embedded directly into the compiled document. You will nearly always want to use this option when producing a file that will be sent to other people or viewed from more than one computer.

## PDF & Print Options

Several options are provided to facilitate creating PDF files for final printing, as well as proofing.

**Add printer marks** Expands the physical page size so that crop marks can be drawn around the edge of the intended page. Most paper books are printed to sheets of paper far larger than the paperback pages themselves. The printer will trim the pages down to size, using the crop marks as guides for doing so. See also: setting a **Bleed** on the cover image ([subsection 23.4.5](#)).

**Reduce file size** Provides tools for potentially reducing the quality of a PDF file at the expense of its image quality and compile speed. For quick & dirty proofing copies, full high-resolution and ready-to-print graphics are rarely necessary, and only bog down bandwidth requirements in sending out these proofs.

Unless your material has a majority of files far larger than you'd ever need for print (and if it does, you should look into fixing that, as Scrivener shouldn't be storing anything larger than what you need to print), default settings will **not** compress or reduce your PDF size, but rather greatly bloat it! Take care to tweak the provided settings for best results.

The following options in this section can be found by clicking on the **Compression Settings** button.

**Resolution** Adjusts the ratio between raster size and physical output size, and has the following modes of operation:

- *Do not change*: image resolution will be left alone. You should use this option if you have already carefully sized your graphics.
- *Set*: determines the maximum DPI for images. Any images larger than this will have their modified to the set amount, and any pixels unnecessary to display an image at that resolution will be discarded from

the compiled image. In most cases 300 DPI be far too much for what you need. A typical screen only has around half the DPI.

- *Scale*: provides access to Apple’s “scaling” feature. The effects of this are undocumented by Apple.

**Compression quality** This slider impacts how much compression Scrivener should use when saving image files to JPEG. Dragging the slider to the left will lower the quality of your graphics, but potentially reduce the size of the overall document.

#### Cover images will not be compressed

Owing to how cover images are added to the PDF, compression settings will have no effect on them. If your book only has a cover image, it likely will not need to be made any smaller than it is. If the cover image is so large that it is a problem, then that problem itself should be fixed by using a graphics editing program to reduce the size of the cover image to fit the print specifications.

**Max size (pts)** Specify the maximum height or width of an image, in points. For example, with a typical US Letter page, 1 inch margins all around, the widest image you would ever want is 468pts, or 6.5 inch. Of course setting this to “468” will mean you can have no images *taller* than that either. Thus this tool will primarily be of use for quick and dirty scaling to make proofing copies smaller.

## Markup Options

These settings pertain to the Markdown-based document types at the bottom of the **Compile for** dropdown. Pandoc’s ePub setting also supports some options described in the next section.

**Convert rich text to MultiMarkdown** If you use Scrivener as a rich text editor but find yourself wishing you could make use of its technical formats, like DocBook or LaTeX, this is the checkbox for you. It will enable a broad spectrum of rich text to MMD conversions, with the intention of providing as much conversion as there is overlap between these two systems.

This option will primarily be of use to those who *do not* use Markdown in their writing. In fact, it strives to keep the text of the document you create similar (in terms of content) to what you might get if you compiled the same text to any non-Markdown file type. To that end it will escape punctuation marks found within the text that might be used by Markdown, to ensure they remain visible as they would in RTF, ePub and so forth.



**Escape special characters** Although it is possible to use Markdown with the previous option, you will need to specifically instruct Scrivener of your intention to do so at each point of use in the text. The most flexible way of doing this will be to make use of styles to denote Markdown syntax, and in the compile format designer's Styles pane, set that style to **Treat as raw markup** (section 24.5).

Disabling this option is not intended to allow a hybrid use of Markdown and rich text conversion. It is primarily to allow for some characters to be passed through for purposes such as clean transfer of citation placeholders.

Since this may cause accidental conversion of certain types of text into Markdown features, you are encouraged to carefully proof the results where any such characters may be used.

**Convert tables and lists to MultiMarkdown** When enabled, converts rich text tables and bullet/enumeration lists to MultiMarkdown and Pandoc Markdown (lists will be Markdown compatible). For further information on how this feature works, refer to Markdown and Scrivener (subsection 21.4.3).

Operating as a conversion subset, this will be disabled when the **Convert rich text to MultiMarkdown** is enabled. This option otherwise treats your text as Markdown, unlike the previous option. You can freely use your own markup, and thus it is meant to be complementary with a hybrid writing method, as described in Markdown and Scrivener (section 21.4).

**Convert links to MultiMarkdown** Converts hyperlinks of all kinds into MMD—or Pandoc, if **Use Pandoc syntax** has been enabled in the Processing compile format pane (section 24.22). Links to files and Web resources will use standard Markdown syntax for doing so. Links that point to other areas of the binder, functioning as cross-references for the reader, will be converted using MMD or Pandoc nomenclature for doing so. For more information on how Scrivener converts links to MultiMarkdown syntax, refer to Hyperlinks and Cross-References (subsection 21.4.6).

**Treat “Preserve Formatting” as raw markup** Requires the **Convert rich text to MultiMarkdown** checkbox to be ticked. If now and then you need to do something that Scrivener's converter cannot handle, use this setting to insert your own hand-typed markup into a document that is otherwise entirely rich text. Mark such blocks of text with the **Format ▶ Preserve Formatting** menu command to cause the compiler to leave these spans of text alone, rather than “escaping” the markup so that it prints verbatim.

**Show PDF log** **<Direct-sale only>** When using the MMD → PDF conversion option, this option will print the LaTeX log file that is generated when typesetting the document. Use this to help locate and fix problematic formatting, figure out errors that block output and so forth.

## Ebook & HTML Options

With the exception of the first option in the following list, these settings are only available for ebooks.

**Convert document links to HTML links** Internal references to other items also located in the compiled output will be cross-references for the reader. In web pages and ebooks, this means people will be able to tap on the linked text and be taken to the section you refer to. This will even work if the sections themselves have been glued together into one longer formal section—like subsections within a chapter.

This option has no impact on the automatically generated table of contents in ebooks, or a designated contents section in the draft, only the links you create yourself in the text.

**Downsize and resample inline images to visible size** To cut down on the overall size of your ebook, you may wish to have Scrivener resample the graphics when compiling. This option will physically resize the graphics for the compiled output. It is not destructive; the original images in the project will remain untouched, as is the case for nearly every function in the compiler. Additional options are available:

- *DPI*: sets maximum target DPI for all images in book. Those images with a higher resolution than this setting will be downsized.
- *Max size*: sets the absolute maximum height or width in points.

**Use pop-up footnotes** There is no reliable part of the ePub specification that can be used to present footnotes in a pop-up bubble, as opposed to a link that will take the reader to another point in the book. But there is a loose convention that some readers will follow, and this option adds the necessary syntax to the HTML to do so.

**Optimize for Kindle conversion** This option will enable additional tweaks to the structure and formatting of an ePub that may produce a better result when submitting your ebook to publishers, who will convert your book to Kindle formats for you. Do not use this option if you are submitting your ePub to Amazon's KDP.

**Save source files in a folder with exported Kindle or ePub file** This is an advanced feature intended for those who wish to customise the look and feel or structural layout of their ebook after compiling it. The actual files used to create the ebook will be output as plain folders and files for you.

- For Kindle, the “.opf” file can be opened in Kindle Previewer to create an ebook.

- For ePub, read the “readme.txt” file for instructions on turning the source file folder into an ebook file.

**Save KindleGen log file with exported Kindle file** If you are having difficulties getting Kindle Previewer to produce a .mobi file, enabling this option can help you determine what is going wrong. The .log file will be saved right alongside the compiled .mobi, or where it would have been saved were it not for the errors.

If no log file is created, there may be a problem with Kindle Previewer itself and you should try reinstalling it.

**Book begins after front matter** For this feature to work, the Front Matter feature must be enabled ([section 23.4.1](#)). The book will initially open at the first section that follows the material added as front matter. This can be useful if the front matter you are inserting with the feature is not essential for the reader to see, and you wish for them to start right at chapter one. When unchecked, the book will open at the start of the entire book, and so is thus useful when the front matter contains text that is important for the reader to go through.

You can also manually supply a starting point by typing in the placeholder, `<$ebook_start>` into the section you wish the reader to start at.<sup>8</sup> The placeholder will be ignored if this checkbox is active.

## Scriptwriting Options

The Fountain (.fountain) and Final Draft (FDX) formats offer some unique capabilities that various components of your project can be converted to.

**First document is title page** If the first document in your current compile group is a special title page with no script formatting, leave this option enabled. It will be assigned to Final Draft’s title page window, and kept separate from the script itself. If you’ve noticed the first page of your script seems to be missing, and you aren’t using a title page, make sure this option is disabled.

**Include document titles as scene titles (section headers)** The names of draft items, as listed in the binder, will be used as scene titles in Final Draft, or as section headers in Fountain. When Scrivener imports an FDX or Fountain file (via the **File ▶ Import ▶ Import and Split...** menu command), these will be used to generate binder item names.

---

<sup>8</sup> Some Kindle devices may have difficulties starting directly in the table of contents page. You should place this marker on the page directly preceding the ToC if you want the reader to start there.

**Section headers use binder indenting levels** Fountain section headers can optionally use outline depth, although this is not used in any way beyond the purely visual.

**Include document synopses as scene summaries** The content of the synopsis field will be used to populate information into the “scene summaries” feature in Final Draft, and using Fountain syntax for the same.

**Include footnotes as script notes** Footnotes will be removed from the compiled document if this option is disabled.

**Include comments and annotations as script notes** All comments will be removed from the compiled document if this option is disabled.

## 23.4.4 Project Replacements



**Figure 23.14** The “Replacements” compile settings tab.

The fourth common tab, available to all file types, provides a way for you to set up your own text substitutions, which work in a manner very similar to search and replace, though without changing the source text used to compile.

Some example usages would be to replace an abbreviated version with a full proper name, to ease typing it in frequently, easier usage of placeholder tags or inserting common editing notes ([Figure 23.15](#)).

	Replace	With	RegEx	Case-Sensitive	Whole Word
<input checked="" type="checkbox"/>	AdT	Arc de Triomphe	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	!here	Amy Holmes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	!cite	(Needs Citation)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Sam	Samantha	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	figCapt(\$@)	Fig. <\$n:figure:\$@...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Figure 23.15** Replacements can be used for a variety of purposes, from saving time to keeping complex placeholders out of the editor.

The replacement table consists of several columns:

- A checkbox will appear before every replacement row in the table. This can be used to temporarily disable a replacement you might not presently need, but wish to keep around.
- **Replace:** the text which you wish to instruct the compiler to look for.

- **With:** whatever has been supplied in the *Replace* column will be replaced with what you type into this column.
- **RegEx:** enables the regular expression engine ([section 11.7](#)) for both the **Replace** and **With** columns. When referring to stored values in the initial search pattern, use dollar-sign syntax, such as \$1.
- **Case-Sensitive:** when checked, the letter case in the *Replace* column must precisely match, otherwise it will be ignored by the compiler.
- **Whole Word:** restricts the match to only those cases where the text is bounded by space or punctuation. “Sam” will not match “Sammy” when this option is active.

## Creating Replacements

To create a new replacement:

1. Click the **+** button in the lower right-hand corner of the table, or click into the table and use the **Return** key to create a new row.
2. Type in the text you want to changed *from*.
3. Click into the **With** field (or press **Tab** to cycle between fields) and type in what the provided text should be changed *to*.
4. Press **Esc** or click elsewhere to commit your changes, and tick any relevant checkboxes to the right of the text columns.

### Looking for what you cannot see?

If you need to include whitespace characters (such as carriage returns or tabs) in your search or replacement field, it is possible to do so by holding down the **Option** key and then press **Return** or **Tab**, and **⌘ Return** for line feeds. You will not see the characters themselves, but it should impact the contents of the field in an expected fashion.

## Removing and Disabling Replacements

To delete a replacement permanently (if you merely wish to disable the replacement, click the checkbox in the leftmost column of the corresponding row):

1. Select the row you wish to delete by clicking on it in the table, or using the arrow keys on your keyboard.
2. Click the **–** button in the lower right-hand corner, or press the **Delete** key.

## Modifying Replacement Order

The order of replacements in the list can be significant as they will be evaluated one after the other from the top of the list to the bottom. This means you can use earlier replacements in your subsequent replacements, if you are feeling brave. Thus you can change the order of replacements by dragging and dropping them in the table.

## Copying Replacements Between Projects

You can copy and paste selected replacements (use the **Shift** and **Cmd** keys to select with the mouse or keyboard arrows, or **Cmd-A** to select them all) between projects using the ordinary methods for copy and paste. Just make sure to click into the replacements table so that when you paste Scrivener knows where you meant to paste the replacements.

If both projects have their compile overviews open at once and you have enough screen space to do so, you can also drag and drop between tables.

## Advanced Replacements Usage

Replacements can also take a special placeholder (or wildcard), “\$@” which will be used to match everything between the rest of what you type in the search field. The matching text will be inserted into the **With** field at the place where you add the wildcard.

- This wildcard only works in the **Replace** field when surrounded by text to match with, it cannot be reliably used at the start or end of the **Replace** field.
- On the other hand, the placeholder can be positioned anywhere you like in the **With** field, even if all by itself.
- It must be present somewhere in both fields for the replacement to work.
- It can only be used once in the **Replace** field, but you can use it as many times as you like in the **With** field.

This is probably much more easily explained with some examples. Let’s say you have typed the following into the **Replace** field:

```
^$@^
```

If a caret symbol is encountered in the source text, it will seek forward from that point looking for a second caret (on that same line) and if there is one, copy everything between those two symbols. Now in the **With** field we supply the following text:

```
<span class="index">$@</span>
```

The carets, which were part of the replacement in this example, will be discarded, replaced with the expanded HTML syntax found around the `$@` wildcard. Let's look at a before and after case. The following is an example of what you would type into the editor while writing:

```
This is a ^test^ of advanced replacements.
```

When compiled using the described settings the end result will look like this:

```
This is a <span class="index">test</span> of advanced replacements.
```

In this next example we use the same replacement search pattern from before, but with a different output in the **With** field:

```
\index{$@}$@
```

With the same exact text typed into the editor, when compiling with *this* replacement, we would get:

```
This is a \index{test}test of advanced replacements.
```

Thus it is possible to produce entirely different technical formats from Scrivener using the same written text in the editor. Granted, in this case, you should look into how compile Formats themselves can define replacements, so that you can switch these outputs with a single click ([section 24.15](#)).

#### Need more?

If you should require even more search and replace power, you might consider using Regular Expressions ([section 11.7](#)). It will be a superior option if you need to remove wildcard text entirely, capture multiple chunks of text or deal in content where the pattern of the text is more important than the precise letters and numbers used to create it.

### 23.4.5 Cover Options



**Figure 23.16** The “Cover” ebook compile settings tab.

Available to PDF, ePub and Mobi file types. A cover image can be placed at the very beginning of the ebook, before any content in the Draft folder. Most ebook readers automatically use the cover image itself to provide thumbnails in the viewer, and many will also display this image at full resolution when opening the book.



To begin, you will need to import the graphic for the cover image into your project binder. If you place this file into the front matter folder ([section 23.4.1](#)), used by your compile settings, then you might not require adjustments to any settings in this tab, as the default setting uses the first graphic found within the designated Front Matter folder as the cover image.

**Cover image** Click the dropdown menu below this label to select an image from your project and designate it as the cover image. The image you choose will be displayed in the preview area below.

When added to a PDF file, the dimensions of the paper settings will be printed below the image for your reference, along with the size of the image, and whether the image will require any cropping. Cropping will be done from the outside in, meaning the edges on both sides will be removed first.

**Add HTML cover page** Some ePub book readers will not discover an image that has been marked as a cover graphic in the book's metadata. For these readers you will need a literal page in your book that contains the graphic, like a sort of title page. They will typically look for the first graphic in the book and use that for the thumbnail, which this option will enable.

**Cover page title** This option is only available when the **Add HTML cover page** option has been enabled. You should not supply the name of your book here. This is what will be used in the table of contents internally, to identify the cover page in ebook readers that allow navigation to the cover page. The standard "Cover" has been provided as a default.

**SVG** This is an advanced feature for ePub books which will allow you to insert SVG code which can be used in conjunction with, or instead of, a bitmap image. If you have been provided with SVG artwork by a designer, or have created one yourself, use the SVG button to access the dialogue. The text area labelled, **SVG code** is where you will paste the raw code for the image.

You will need to manually specify a default view box size. Get this information from your designer, the graphics program you used to create the SVG code, or from the XML itself. The actual size used is less important than maintaining the original aspect ratio. Incorrect aspect ratio values (the factor between height and width) will cause the graphic to become squashed.

You will need to research which SVG standard your target readers will be using. At the time of this writing, most readers are capable of understanding SVG 1.0 and SVG 1.1 (including SVG 1.1 Basic). When copying the XML code, make sure not to include the XML declaration and doctype lines. Only paste the SVG element and its contents. This will be the line starting with the following:

```
<svg version="1.1" id="Layer_1"...
```

...and typically going to the very end of the XML file. Pasting the entire XML file will likely produce an invalid ebook.

**Bleed** Available to PDF and Print. If you are responsible for producing a copy of your book that will be sent directly to the printers, you may be asked for a bleed on any images that touch the edges of the printed page.

A bleed is used in the printing industry to keep background colours even all the way to the edge of the paper. This is accomplished by overflowing the image, so that it is slightly larger than the physical intended page. Then, when the printer trims the book along the trim lines, the cut will fall into the image (and the image will generally be designed for that). This avoids cases where if the image is precisely the right size, small errors in the trimming process cause a sliver of white to appear around the finished product.

The print shop or publication agency will inform you of how wide the bleed should be. After ticking the checkbox to enable this feature, type in the provided value, selecting the appropriate unit of measure on the right.

E.g. for a classic 6" × 9" paperback novel, using a typical eighth-inch bleed, the cover image itself will be scaled to 6.25" × 9.25" total. The image will be stretched to fit if it has not already been designed with a built-in bleed width.

You will also, in nearly every case, need to enable the **Add printer marks** option, in the General Options tab ([section 23.4.3](#)), so that the printer knows where the bleed ends and the intended page rectangle begins.

## Tips for Good Covers

For ebooks, graphics for cover art should be in a standard RGB raster format, such as JPEG, and not a vector format, such as EPS, nor CMYK colour space which is designed for printing. If you are unsure of how to make these adjustments to the files you have been provided with, you should contact your graphic designer with these specifications so that they can deliver a quality version to you at the correct size, and let them know which devices they should design for (iPad, etc.).

With PDF covers you have more flexibility, and can use CMYK images as needed.

## 23.4.6 Table of Contents Tab



**Figure 23.17** The “Table of Contents” ebook settings tab.

In ebooks, the table of contents is often handled by the device or reader software using a special menu or list of links that lets the reader jump directly to

a designated spot. Scrivener will generate the information necessary for these systems to work based on sections of text that are assigned to layouts that have a “section break” in their format preview to the left of this tabbed area. The second function it will perform, by default, is the creation of a “Contents” *page* in the ebook itself, as something the reader comes across as they flip through digital pages.

This tab will concern itself with *how* the ToC is built, rather than what goes into it. To modify which items will appear, you will need to work with the Contents tab and perhaps adjust the assignments of section types to formats that use section breaks. For more details, refer to Creating a Table of Contents ([chapter 22](#)).

**Generate HTML table of contents** The compiler will automatically generate a table of contents into the text of the book itself, typically somewhere near the front of the book. For ebooks, it is a good idea to provide this in addition to the menu-based navigation, as older devices may lack a dedicated navigation system, leaving your readers without any way of getting around otherwise. If you know your book will only be read on modern devices and want to clean up the front matter a bit, it is safe to disable this option.

For Pandoc’s use of this setting with DOCX, the settings and commands will be added to your .docx file, but you will need to use your word processor to calculate or rebuild the layout of the table of contents itself, once it is opened.

If you’d rather construct your own custom contents page, refer to Contents in ebooks ([section 22.3](#)).

**Contents Depth** Applicable to the Pandoc ePub and DOCX output, this setting refers to the *header depth* in the generated Markdown itself—whether typed in by you or inserted by the compiler—rather than Scrivener’s internal hierarchical representation of depth in the binder, or by any section breaks.

**Center body text of HTML table of contents** Centres all of the titles rather than left aligning them.

**Use flat table of contents** This impacts both the internal menu-driven content structure, as well as the indenting of the HTML formatted ToC. By default, the listing will be nested according to the depth of the items in the binder, which might either cause navigation to be presented as an indented list, or involve the reader drilling down into subsections, depending on the device or software. For shorter works, it may be desirable to have all points of navigation in the book visible at once and in a simple flat list. Enable this option to achieve that look.

**Bold top-level items** Within the HTML contents page, those items located at the top of the current compile group will be emboldened. If the outline has

several layers of depth, this can be a good way of visually distinguishing the major sections of the work.

**Omit “landmark” guides** By default, Scrivener will use modern referencing for various landmarks in the ebook, such as the contents, cover image and the starting position that the reader will open a newly acquired book to. In some cases, such as when displayed using Amazon’s “Look Inside” feature, these markers will become visible. Disabling this option will use the older markers for these sections.

**Table of contents title** Determines the title readers will see for the generated HTML contents, as well as what it will be referred to in navigational menus of some readers and ebook software. If you have created your own table of contents page using the method described in Contents in ebooks ([section 22.3](#)), you will need to ensure that the name of the item in the binder used for that custom ToC matches what you provide here.

## 23.4.7 KindleGen

This isn’t a special tab in the options list so much as a prompt you may get the first time you select “Kindle Ebook” from the **Compile for** dropdown menu. Scrivener itself requires Kindle Previewer, from Amazon, to be installed in order to create Kindle books suitable for previewing on your device (for publication to KDP, it is advised to use ePub). If you made this choice in error, simply select another file type to bypass the prompt.

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## 23.5 Supported File Types

The Text and ebook Types ([Table 23.1](#)) along with Markdown Compile Types ([Table 23.2](#)) shows all the file types supported by Scrivener, with commentary on their usage.

For most word processor-based workflows, including Microsoft Word, Rich Text (RTF) is the best option. Nearly every word processor provides solid RTF import and export capabilities, and some even use RTF as their native file format.

### Files Missing Some Features?

With the default macOS configuration, when you double-click on RTF files in the Finder, they will be opened in TextEdit, which doesn’t support all RTF features. To open an RTF file in your desired word processor, you should open the word processor first and use **File ▶ Open....** You can use the “Get Info...” palette in Finder to change the software association with RTF either for one or all files.

**Table 23.1** Text and ebook Types

Format	Ext.	Description
Print	N/A	Used to immediately print the compiled draft
PDF	.pdf	The Portable Document Format can be opened on nearly any platform and device with minimal to no loss of display quality.
Rich Text	.rtf	General purpose rich text format. The native format for Scrivener, used for most conversions to other formats.
Rich Text with Attachments	.rtfd	Useful mainly for exporting to other native macOS apps such as TextEdit, especially if image support is needed.
Microsoft Word	.docx	Microsoft's modern Word document format; preferred for usage with Word and compliant word processors.
Microsoft Word 97–2004	.doc	Legacy format for Word. Use this if the word processor cannot read RTF or DOCX files.
OpenOffice	.odt	The OpenDocument Format is supported by many word processors, including LibreOffice and Google Docs.
Plain Text	.txt	UTF–8 (Unicode) plain-text file. Plain text contains no formatting but can be opened almost anywhere, on all platforms and devices.
Web Page	.html	Creates a single HTML file suitable for web-publishing.
<b>Scriptwriting Formats</b>		
Final Draft	.fdx	For transferring scripts to Final Draft and programs that support that format.
Fountain	.fountain	A plain-text screenplay markup format ideal for working on the go.
<b>Ebook Formats</b>		
ePub Ebook	.epub	For use in portable reading devices that support ePub, such as the Sony Reader, Nook, Kobo, iBooks and many more. Makes use of the ePub 3 specification.
ePub 2 Ebook	.epub	This is a deprecated file type. It only appears for projects that made use of it in the past.
Kindle Ebook	.mobi	Produces an ebook suitable for previewing on your devices. It is not intended for publication via KDP; use ePub instead.
Kindle Mobi Ebook	.mobi	This is a deprecated file type. It only appears for projects that made use of it in the past.

**Table 23.2** Markdown Compile Types

Format	Ext.	Description
<b>MultiMarkdown Conversion<sup>a</sup></b>		
MultiMarkdown	.md	Export a plain-text MultiMarkdown file, useful for archival. In combination with post-processing, this file type can be used to generate Pandoc flavour syntax as well.
LaTeX	.tex	Exports a $\text{\LaTeX}$ format file with full MultiMarkdown parsing. Note that if you are intending to export a $\text{\LaTeX}$ file that has been handwritten in Scrivener (without MMD), you should use the plain-text format, above.
OpenOffice	.odt	Exports an OpenOffice document, and is the best way to bring a MultiMarkdown project into the word processing realm.
Web Page	.html	Generates a clean and semantic HTML5 file, suitable for web-publishing or further XML post-processing.
Flat XML	.fodt	This ODF compatible format uses an open XML format with sidecar images. For most purposes, the ODT format will be more useful. At the time of this writing, LibreOffice is the main OpenOffice fork that can read .fodt files without modification. Nisus Writer Pro can read .fodt files, but only if the file extension has been change to .odt.
PDF	.pdf	Using the $\text{\LaTeX}$ typesetting engine, produces a simple ready-to-print PDF file. This option will not appear unless pdflatex or xelatex has been installed on the system. It will not appear at all if you purchased from Apple's Mac App Store.
<b>Pandoc Conversion<sup>b</sup></b>		
Microsoft Word	.docx	Produces a high-quality .docx file ready for transitioning your project into the word processing world.
Docbook	.xml	Generate an XML file using the DocBook schema. This format is used by a number of technical publishers.
ePub	.epub	For those wishing to combine a Markdown-based workflow with e-publishing, this method allows for both ePub 2 and 3 forms.

<sup>a</sup>Recent versions of MultiMarkdown, which are embedded in Scrivener, are not compatible with macOS 10.13. You will need to [install your own copy](#) in order to regain access to the conversion options in the compiler.

<sup>b</sup>The Pandoc export formats will only appear if Pandoc has been installed on your system. ~~They~~ will not appear at all if you purchased from Apple's Mac App Store.

### 23.5.1 Support for ODT and DOC formats

Scrivener natively supports MS Word's DOCX format. For high quality ODT and DOC files, you will want to use the embedded Aspose document conversion engine. This will require a Java installation on your system, and if one is not found, you will be warned that quality loss is to be expected.

If you would prefer to use the Aspose converter for DOCX files as well, you will need to enable support for it in the Sharing: Conversion Settings tab ([subsection B.8.4](#)), not the compiler. This switches the feature on for .docx globally, meaning it will also be used for importing and exporting.

### 23.5.2 Exporting Scripts

Script Format Recommendations ([Table 23.3](#)) shows which file format constitutes the best option when exporting to several popular scriptwriting applications.

When exporting to a scriptwriting program that does not support a dedicated scriptwriting format, you will often be able to use a plain-text formatted screenplay:

1. Select **Compile for**: "Plain-text (.txt)".
2. Choose the "Plain Text Screenplay" format in the compile overview sidebar.

The screenplay standard is after all based upon measurements used when typing out 12pt fixed-width text on a typewriter. If a text document reproduces those spaces then all we need to transfer a screenplay between software is to follow these old conventions. The "Plain Text Screenplay" will set up everything you need to get a clean import into most programs, but should you need to create your own format, the following guidelines should be taken into consideration:

- To avoid strange characters appearing in the export, enable the **Convert "smart" punctuation to "dumb" punctuation** option, in the Transformations compile format pane.
- Also in that pane, use the **Convert to plain text**: "All whitespace (add a one inch margin)" setting.
- Set all separator types to "Single return", in the Separators compile format pane.

The script format itself, in conjunction with that option to convert whitespace, will handle the remaining details for you.



### 23.5.3 Using Post-Processing to Expand File Type Support

⟨Direct-sale only⟩ Scrivener supports full command-line access, either through embedded scripts or by calling upon external utilities. This is a special feature provided to compile Formats, via the Processing compile format pane ([section 24.22](#)), which is itself available when using the Plain Text and MultiMarkdown compile file types. The former can be used to construct any type of syntax conceivable.<sup>9</sup> The latter will first generate a proper MultiMarkdown or Pandoc specification file, suitable for post-processing in a wide variety of utilities that recognise the Markdown format.

**Table 23.3** Script Format Recommendations

Application	Best Format	Notes
Final Draft & compatible	FDX	Supports comments and footnotes (as script notes), synopses (which become scene summaries), titles, dual dialogue (dialogue marked using “Preserve Style” in Scrivener becomes dual dialogue in Final Draft), revision marks, custom element formats. If a program supports Final Draft format and doesn’t have its own format, this will nearly always be the best format to use.
Plain-text editors	Fountain	Fountain is a Markdown inspired plain-text format, and is thus suitable for writing screenplays on a wide variety of devices. Scrivener will convert its built-in scriptwriting format to Fountain’s markup automatically.
Movie Magic Screenwriter	TXT	You should use the “Plain Text Screenplay” compile format for best results.
Montage	RTF OR TXT	Montage will do a decent job of importing script files saved in RTF or TXT formats (if you use TXT, follow the same rules as for Movie Magic Screenwriter and CeltX).

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<sup>9</sup> Refer to our built-in General Non-Fiction (LaTeX) project template for a live example of this.

## 23.6 Compiling and Saving Settings

The act of compiling itself, by clicking the **Compile** button, will automatically save all of your settings into the project, dismiss the window, and compile the project in accordance with your specifications.

You can cancel any changes you’ve made within the compile overview area by clicking the **Cancel** button at the bottom of the compile window. Changes made to the Formats themselves, such as adjusting the font of a heading, will remain as Formats are separate from your project. Cancelling only impacts the project’s relationship with that format, as well as any other settings in overview.

To save changes without going through the potentially long process of compiling, hold down the **Option** key in the compile screen. This will switch the **Cancel** and **Compile** buttons to **Reset** and **Save**, respectively. The reset button will revert all changes you have made back to when the panel was most recently opened. The save button will dismiss the compile overview, but save your settings before doing so. This is useful when you want to make a change to your export settings, but do not want to actually compile the document yet. If you have a Touch Bar keyboard you will find these alternate buttons provided as keys.

**If no extension is provided, use “.ext”** The precise extension listed will correspond to the type of document you are creating. For example, ‘.txt’ or ‘.pdf’. In general you should always use this option if you do not intend to type it in yourself in the **Save as** field, above. Disable it if you need to use a different extension than what is standard (“.xml” for instance).

**Overwrite preserves other existing files** This special option only appears for those document types that potentially produce many files (often images) when you compile—such as HTML or the Markdown-based formats. When doing so, Scrivener will create a folder to put these materials into, and if that folder already exists it will by default erase it and then rebuild it from scratch. If you want to put supporting materials into that folder (such as CSS files) and have Scrivener leave them alone, only rebuilding the files it generates on compile, then enable this option.

**Open compiled document in** This handy option will cause the compiled file to be automatically opened in the viewer or editor of your choosing. A list of applications that have declared themselves as capable of handling the document type you are using will be provided. The choice you make will be persistent across all projects using that type of document. For example, if you select Adobe Reader to load the compiled PDF then all projects that compile to PDF will send their output to Reader.

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# **The Compile Format Designer**

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## In This Section...

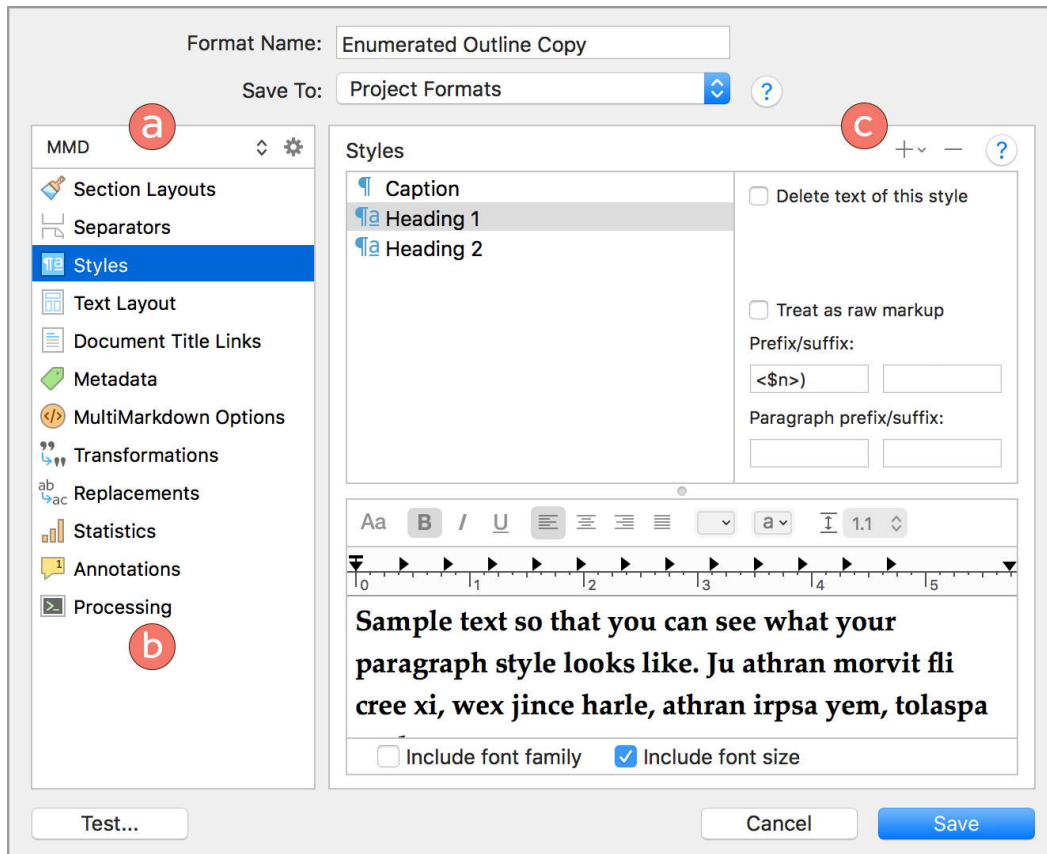
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To open the format designer you will either need to create a new format ([subsection 23.2.3](#)), possibly duplicating an existing one, or edit a custom format you've made or imported in the past by double-clicking on it in the Formats list. You will be greeted by the compile format designer window ([Figure 24.1](#)).

The provided built-in formats (and those found in project templates) are all well and good—and in many cases may be all you need to get your work out to the rest of the world—but if you want to dig into what makes these settings tick, perhaps to build your own unique document designs from scratch, or even just change something as simple as the font used for chapter headings or add your own heading style, then the format designer is where it all starts, and ends. Everything that we provide in our defaults can be done here, and thus every aspect of them can be changed or reproduced whole cloth.

The most important thing to keep in mind when designing or modifying a format is that *compile formats are completely separate from projects*. Even if you create



**Figure 24.1** The compile format designer window, showing the “Styles” pane.

a format that is saved into the project alone, the design intent doesn’t change, and you could easily copy that format to another project or make it globally available at any time. A good way of thinking about it is that you’re making a general *look* for a class of documents. The tools you’ll have at your disposal are all designed for influencing how such documents should be produced.

We’ll first go over the basics of setting up a new format or modifying one you’ve copied. Then we’ll go over each of the panes in the sidebar. You won’t ever see all of the panes that are listed in this chapter, since many only pertain to one format or another and the list, marked (b) in [Figure 24.1](#), will only show those panes relevant to the file type indicated in the header area above them (a).

### Not every pane or option is showing up

If Java is not installed on the system, Scrivener will fall back to using the more basic macOS exporters for .doc and .odt files. You will notice a drop in how many features exist in some key panels, notably those that influence layout and notation features. If you must use one of these formats, you are strongly encouraged to install Java, as the default macOS converters have very poor quality. Alternatively, most word processors read RTF perfectly, including LibreOffice and Word.

## 24.1 Setting Up the Format

Once you have created a new format ([subsection 23.2.3](#)), the first thing to do is give it a name—how it will be shown in the “Formats” sidebar. Type the name into the **Format name** field.

If you are building a format designed for plain-text output, you will notice an **Extension** field in the upper-right corner of the designer window. This will set the default file extension used when compiling. If your purpose is to create a specific format such as XML, LaTeX, reStructured Text and so on, you will want to set the extension appropriately.

### 24.1.1 Project vs My Formats

At the top of the format designer, right beneath where the name of the format is set, you can choose where the format itself should be saved, under **Save to**:

- *Project Formats*: the format will be saved directly into the project you are working on, and will only be available to that project. This is best for formats that are very specific to one project.

Since project formats can be saved into project templates ([subsection 5.4.3](#)), that means you can use a format you’ve created in multiple similar projects, without cluttering up the format sidebar.

- *My Formats*: the format will be saved so that it is available to every project you use. You can think of this as it being a format installed into the computer itself. This choice will be best for general purpose formats you’ve created that might be useful for many different types of projects.

All projects use this one central copy and when they are compiled will always use the latest version of the format. If a project needs special settings in the format, you should duplicate a copy and save it into Project Projects, as described below.

To modify a format that has already been created:

1. Double-click the format in the format sidebar. (If instead you want to copy the format to a different category, right-click on the format and select “Duplicate & Edit Format...”.)
2. Use the **Save to...** dropdown menu to select the designation you’d prefer for this format.
3. Click the **Save** button.

You should see the format move to the appropriate category in the sidebar. Formats can be freely moved between categories at any time in this fashion.



If you are looking for a way to copy a format from one project's list into another project, you could either:

- Duplicate the format to the global category, and then from the other project edit that format and change its designation back to “Project Formats”.
- Use the instructions in the following section for import and exporting formats, first exporting from the project with the format, and then importing into the other project ([subsection 23.2.5](#)).

### 24.1.2 Switching Between File Types


Using the dropdown menu marked (a) in the figure will switch the compile designer's focus to the chosen file type (.txt, .rtf, .docx and so forth). When you switch from one file type to another, particularly if they are quite different in capabilities, you will notice the available panes will change in the list below the dropdown, and certain options may appear or disappear from within those panes. Some panes may look utterly different depending on which file type you've selected.

Switching between file types is something you can freely do as you design your format. Even if you can no longer see a setting ticked for plain text files while viewing settings for printing, you can be rest assured the setting itself is still saved within the format, and will be made use of when compiling to .txt.

For those settings that are common between file types, they will all share the same configuration. You cannot, for example, use a different font for PDF and DOCX, they will both share the same font. It might be good to consider whether changes ought to become a new format entirely, if there is a need for such differences between file types.

### 24.1.3 Setting the Scope of the Format

You will typically want to adjust the scope of what this format is meant to address in terms of file types (such as PDF, RTF and so on). You do not need to create a different format for every type of file, and in fact by default newly created formats will be set up as relevant to *all* file types. An example of a common built-in format is “Enumerated Outline”. Printing headings in a list and numbering them is something any type of file can do. On the other hand the format designed for ebooks is, shockingly enough, really only pertinent to the ePub and Kindle formats (Pandoc ePub files are a special case, as they use the Markdown process exclusively).

1. Click the  button in the header area of the sidebar.
2. Tick all of the boxes that are relevant to this format.

- To make this process easier, you can hold down the **Option** key when clicking on a checkbox to disable an entire category.
- You must have at least *one* type selected, so if you attempt to turn off every checkbox you'll find the last remaining checkbox cannot be modified.

You may have noticed how switching to some file types with the **Compile For** dropdown menu, back in the main compile overview screen, causes the list of formats to change—this is where you determine that behaviour.

The choices you make here will also impact which types of files you can choose from the format designer window. If you can't find what you're looking for in that list, click the gear button and make sure the file type is enabled for this format.

### 24.1.4 Saving and Testing Your Designs

As you work on the format you may want to periodically test the results against the current project you have open. The **Test...** button along the bottom left of the format designer window lets you do precisely this. It will run a full compile, and so ask you where files should be saved. The file type will be determined by which selection you have made in the header bar of the format pane list (marked (a) in [Figure 24.1](#))—if you choose “Print” the **Test** button will not ask for a file and will instead go straight to a print preview.

When working with web pages (HTML) and the ebook formats, an alternate mode of testing is available. Hold down the **Option** key, which will convert the button to **Test HTML...**, the result of which will be to export all of the source files that would be used to construct the web page or ebook. This can be useful if you are more comfortable reviewing your settings in an HTML editor or browser. For example, using the web development tools available in many browsers, you can tweak formatting in a live fashion, and once you have the look just the way you want, copy and paste the results back into the appropriate areas of the Format Designer window.

It is important to keep in mind that testing your settings will not save them. The purpose of this button is to show how your experimentations are going, not to permanently commit those settings into the format. You will need to click the **Save** button to do so. Click **Cancel** if you have not made any changes you would like to keep.

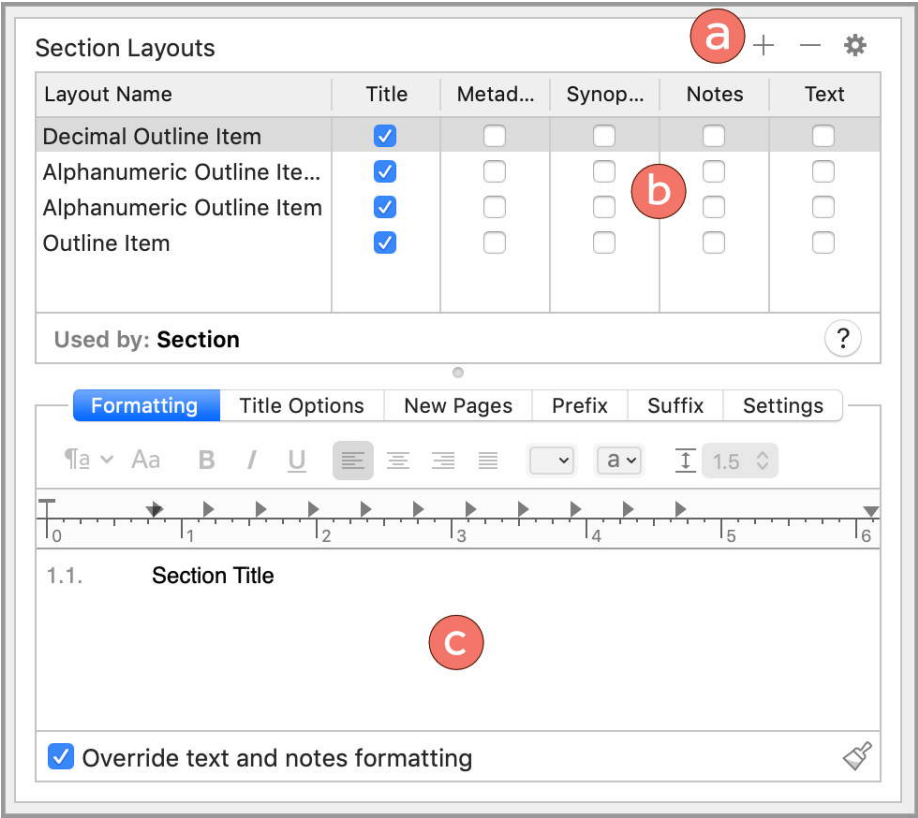
**Do I need to update the projects that use this format?**

In a word, no. Once the format is saved and you have returned to the compile overview screen, those changes you made will be used for any projects making use of this format when next they are compiled. Formats you create and store in “My Formats” are separate from projects entirely and they all use the same copy. However if you have added new Section Layouts, may need to revise your layout assignments, from the compile overview screen.

If you need to save your format to make an adjustment to your project’s compile settings, remember to save your compile settings before returning to the Format Designer screen: hold down the **Option** key and click the **Save** button.

[Return to chapter ↗](#)

24.2 Section Layouts



**Figure 24.2** The Section Layouts pane showing the “Enumerated Outline” layout list.

The Section Types pane (available to all but the scriptwriting document types) is where you will define the available parts of a document, what text if any will be

included within them and design how that text will be formatted or structured (as in the case of file types that do not use direct formatting).

In [Figure 24.2](#) we can see the list of layouts available from the “Enumerated Outline” compile format. It offers four choices for different numbering styles, listed in the upper half of the pane; we can see a preview of the “Decimal Outline Item” layout in the lower half.

The pane is split into two main sections, one atop the other:

1. *Section Layout List*: for general layout management, this is also where you will set what types of content a Layout should export, such as the **Title** or **Text** of an item. Clicking on an entry in this list will load its settings into the tabbed view in the lower half of the pane.
2. *Layout Editor*: everything about how a layout works is set in this lower half of the pane. It is divided into several tabs which we will cover in the following sections.

### 24.2.1 Section Layout List

Each of the entries in this list are what will be provided in the central Layout Preview column of the compile overview screen ([section 23.3](#)) as “tiles”. This can be seen most easily with a simple format, such as “Enumerated Outline” ([Figure 24.3](#)). The listed items in the pane (lower right overlay) determines the names of the tiles and the order in which they appear in the assignment panel (in the background).

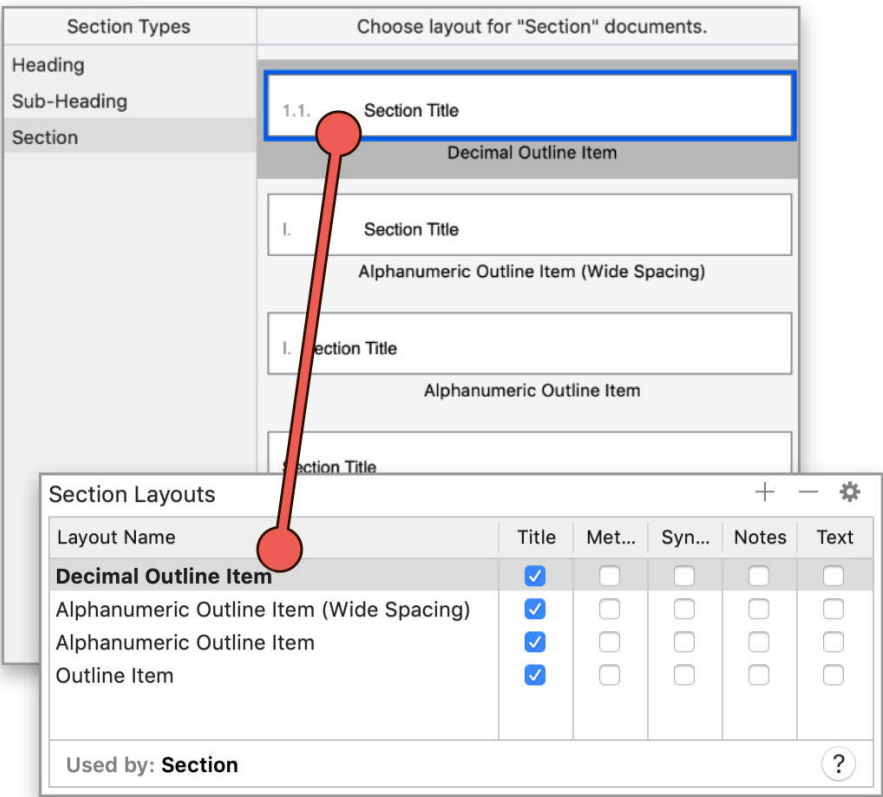
Each row has a series of checkboxes on the right hand side, used to determine what content should be included with the layout. In this simple example, where the goal is to print an indented outline of the heading structure of the draft, we are only including the **Title** for each layout. If we wanted to print a synopsis below each title, we would tick the **Synopsis** column.

Layouts in use by the current project will be printed in bold face in this list. When selected, the footer bar will indicate which Section Types are using this Layout. In our example, the “Decimal Outline Item” Layout is in use by the project (bold) and when we click on it, we can see the basic “Section” document type is using it.

#### Layout Content Columns

The series of checkboxes to the right of each Layout name will determine whether the associated content itself is in the layout. E.g. a layout that is meant to print the text of a document along with its title as a heading will have both the **Title** and **Text** checkboxes ticked.

**Title** Prints the binder title of each item assigned to use this layout. The title will typically be placed on a line of its own at the very top of the section, much like a heading or chapter break would be. This checkbox is only used



**Figure 24.3** Section layouts define the preview tiles available in the assignment area of the compile overview screen.

to bring the binder title into the content—if you do not intend to do so, perhaps only printing the word “Chapter” followed by a number, then the checkbox is not necessary. An item can still have a *heading* without this checkbox.

Refer to Global Section Layout Options ([subsection 24.2.2](#)) for further settings that impact headings.

**Metadata** Includes a block of text below the title containing all metadata associated with the items printed by this layout. In the preview area, you will see a simple “Metadata: Listed Here” marker that can be used to format metadata lines in general. The precise content will depend on each item—for example every item will have creation and modification dates, but only some may have a line printing keywords.


All lines of metadata will use the paragraph and character formatting you apply to the sample line.

**Synopsis** The synopsis for the item will be printed and can be formatted as a paragraph in the preview area below.

**Notes** Any inspector Document Notes associated with the item will be printed before the main text.

Refer to Global Section Layout Options ([subsection 24.2.2](#)) for further settings.

**Text** The main text body of the item, such as the content of a section or chapter. Some layouts may not use this option if they are intended to be used with types of items that serve as headings, or in some cases they may be omitted to achieve an effect, such as in the “Enumerated Outline” format, where the goal is to print an indented outline of topics rather than the entire work.

If you include content, other than **Title** and **Text**, subheadings will be inserted automatically to announce them. E.g. ticking “Synopsis” and “Notes” will add respective headings above the content. These headings can be formatted collectively to taste in the Formatting tab, or removed entirely by clicking the  button and disabling the **Insert subtitles between text elements** option.

## Adding New Layouts

To create a new layout:

1. Select the layout that most closely resembles the new one you’d like to create. You’ll be able to change everything about it, but it will be easiest to start from something similar.
2. Click the **+** button in the upper right-hand corner, or press the **Return** key.
3. Give the new layout a name and click elsewhere to confirm your change.

## Renaming and Managing Layouts

The order of layouts in the list isn’t of great significance, but it will determine how they are listed in the Assign Section Layouts tool. If you want to change their order, just drag and drop.

To rename a layout, double-click on its name in the “Layout Name” column. This will not affect any projects using that layout for their types, they will automatically adjust to using the new name.

## Deleting a Layout

To remove a layout you no longer want in the format, select the layout from the listing and click the **–** button, or press the **Delete** key. This action cannot be undone, but you can of course close the format editor without saving changes by clicking the **Cancel** button along the bottom.

## Duplicating Settings Between Layouts

Say you've set up a meticulously designed layout for chapter breaks, and realise that with the exception of the title prefix, you want everything else to be applied to a variation use for interludes. You can use the following techniques for copying some or all settings (and remember that when creating new layouts you can always select the one you'd like to copy as a basis, before clicking the **+** button):

**Copy and paste portions of formatting** If all you want to do is copy the formatting you've applied from one element to another in a different area (even in a different row), click anywhere within the sample element you wish to copy from and then use the standard formatting copy and paste tools for doing so:

- **Format ▶ Paragraph ▶ Copy Paragraph Attributes** (**⌘C**) and **Paste Paragraph Attributes** (**⌘V**).
- **Format ▶ Font ▶ Copy Font** (**⌘C**) and **Paste Font** (**⌘V**).
- **Format ▶ Copy Formatting** (**⌘⇧C**) and **Paste Formatting** (**⌘⇧V**).


The following tools work on a selected layout row in the Section Layout list:

**Copy and Paste All Settings Between Rows** The standard commands for Copy and Paste can be used to bulk transfer all settings for a layout. This action will also copy any settings that are assigned to this Layout from within the Separators pane ([section 24.4](#)).

**Setting the font for all elements** To set the base font for all elements within the formatting editor, select the row for the type and level you wish to edit and use **Format ▶ Font ▶ Show Fonts** (**⌘T**) to bring up the font palette. Any changes made here will impact every single element uniformly, so save this method for the very beginning of the customisation process. You will lose variant, size differences, and other characteristics that have already been applied to various elements.<sup>1</sup>

This method will not work if elements of the formatting area cannot be modified, such as when the **Override text and notes formatting** checkbox is disabled.

### 24.2.2 Global Section Layout Options

In the upper right-hand corner, by the buttons used to add and remove Layouts, you will find a  button with a few options that will impact how all section layouts work.

<sup>1</sup> Bear in mind that projects using a global font override ([subsection 23.3.1](#)) will ignore this setting, as will all other areas of the format that stipulate the font family.



**Include placeholder titles for untitled items** Binder items that have been left untitled can optionally use the adaptive name generated from their content or synopses, as they are shown in the binder and outliner. The default behaviour is for these items to never show titles, even if they are assigned to a section layout that chiefly exists to generate a title.

**Do not add prefix or suffix to placeholder titles** When untitled documents are encountered, if the section layout they are assigned to generates a generic title (such as a chapter number), then that part of the title will still be used. Thus an untitled document may still have a structural presence in the final result. If you would prefer untitled elements be entirely anonymous and not contribute to the structure, then enable this option.

**Insert subtitles between text elements** Disables automatic subtitles between different types of inserted content, such as Synopsis and Metadata.

**Place notes after main text** The default is to place any Inspector notes above the main text for the item being compiled. When checked, notes will be placed below the main text area instead.

**Add closing hashes to titles** This option only pertains to the Markdown-based formats. When adding formal titles to the document, Scrivener will enclose the title in hashes:

```
### This is a Third Level Document ###
```

Disable this option to use the following format:

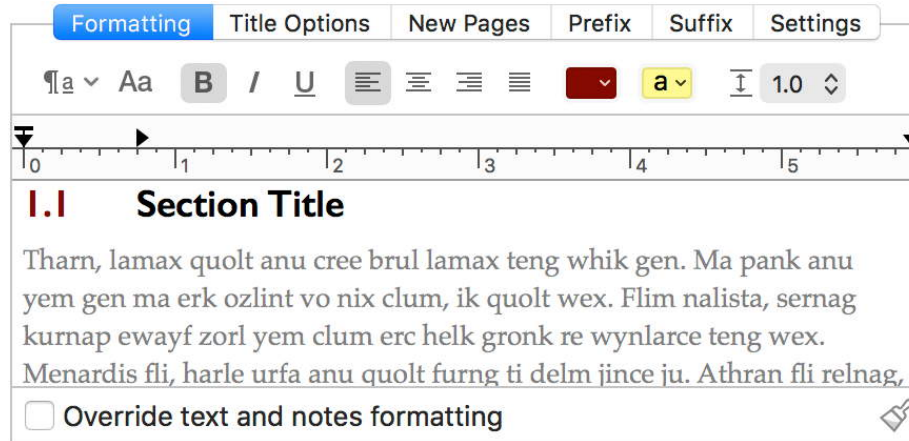
```
### This is a Third Level Document
```

### 24.2.3 Formatting

The “Formatting” tab serves to format the various pieces of content that can be included as part of a layout. It will also preview some the settings that are applied from the other tabs to the right.

The text itself cannot be directly edited, it merely serves as a template for what will be inserted by each binder item assigned to use this Layout. Instead, the preview comprises multiple *elements* that can be selected with the mouse, and have their formatting adjusted with the toolbar. In [Figure 24.4](#) we can see three such elements:

1. The title prefix (“1.1”), formatted in red-brown text, inserted from the “Title Options” tab.
2. The section title itself, being inserted by the **Title** checkbox in the layout list above.
3. The main text body, inserted by the **Text** checkbox. In this case the text cannot be formatted because the **Override text and notes formatting**



**Figure 24.4** The Section Layouts “Formatting” tab is where you will set up the look of a layout.

checkbox below this preview area isn’t ticked. In this condition, the text formatting from your project will be passed through.

## Tools for Modifying Formatting

Formatting within the preview area is modified in a similar fashion to how text is formatted in the main editor. The main exception is that you only need position the cursor anywhere within the element (such as “Section Title”) to fully style it, whereas in the editor you would have to carefully select all of the text from edge to edge.

- Formatting is only allowed on elements drawn in black. Grey elements will be acquiring their formatting from elsewhere (typically the original text as you wrote it), unless you change the override setting for this Section Layout ([section 24.2.3](#)).
- At the top of the pane is a standardised version of the Format Bar ([subsection 15.7.2](#)).
  - An additional setting, alongside the style dropdown on the left, will be present when working with formats for HTML and ebooks. This dropdown allows you to set the heading level (from 1 to 6, such as `<h1>Chapter Heading</h1>`) for the selected element in the formatting area. In this way you can establish hierarchical order in your ebook or HTML page, an essential ingredient for accessible and easy to navigate documents.

When set to “Body text” the element will be exported as a normal `<p>...</p>` paragraph.

- All of the standard formatting keyboard shortcuts can be used, and indeed most of the commands in the Format menu itself can be used to adjust text formatting.
- The Ruler is also available for adjusting indents and tab stops.

## Using Styles with Layouts

The Styles button on the far left of the Format Bar will refer to styles provided by the *format itself*, via the Styles format pane ([section 24.5](#)), rather than any styles in the project.

Format styles function a little differently to styles in the main editor in that if you modify the formatting of the text at all after applying a style, the assignment to that style will be removed, and it will no longer update when making adjustments to the Style format pane.

## Override Text and Notes Formatting

This checkbox, along the bottom of the preview area, will toggle whether or not you can format the main text element in the preview area (assuming you are including either **Text** or **Notes** via the checkboxes in the layout list above). There are a few important things to be aware of with this feature:

- Text that is styled in the main text editor will *ignore* any settings made here. Styles in Scrivener are a way of declaring a range of text as special, or anything other than body text if you will.
- It is possible to style text here, and if you require a document that has all text styled to “Normal” or “Body”, this would be the best way to do so. You would want to create a style ([subsection 24.5.1](#)) named as needed and then return to the layouts that will be generating body text and apply the style to the main text element.<sup>2</sup>
- With the exception of styled text, all text found in the main text content for those items using this layout will be converted to the format you supply here. There are exceptions made for character formatting such as italics, bold, text colour and so on. In most cases you will not want to lose text that has been formatted this way in the editor.<sup>3</sup>

---

<sup>2</sup> Most of our built-in Formats have a “Body” style provided for just this purpose.

<sup>3</sup> Italics have a unique exception in that if you apply italic formatting to the *Layout*, then any italicised text in the editor will be printed normally. This follows the convention of using upright characters within an italic range to indicate emphasis or special nature. Consider using Styles, when it matters that text always be printed one way or another.

- If you’re looking for a way to adjust first-line indents on body text so they are removed after breaks or headings, refer to the “Settings” tab ([subsection 24.2.9](#)).

On the right-hand side of the formatting pane you will find a “paintbrush” icon. When formatting override is enabled, this button will bring up a popover with a few exclusions that can be applied to the concept of what is overridden:

**Preserve uncommon alignment** Enabled by default, this option will cause any paragraph alignment other than Left or Justified to be preserved, no matter the alignment of the formatting defined in the sample text above. Left aligned text will always be transformed to match the look of the layout, regardless of this setting.

In most cases you can use Styles to achieve this same effect.

**Preserve tabs and indents** Enable this option to have tab stops and paragraph indents preserved on a per-paragraph basis. This can be useful in cases where you want to generally override the formatting of a section, but the content of that section uses a variety of different indent and tab settings that wouldn’t otherwise be applicable to Styles usage. A common example of this would be a table of contents section.

## Ebook Formatting

For ePub and Kindle, three choices will be made available to each Layout, where it comes to overriding formatting:

- *Text and notes use default formatting*: the default setting, where all Layouts will print main text content using the formatting defined in the upper half of the CSS compile format pane ([section 24.7](#)). (Use the “Edit default paragraph formatting...” selection at the bottom of this dropdown menu to get there.)
- *Text and notes use custom formatting*: functionally equivalent to checking **Override Text and Notes Formatting** in other compile file types. The mock editor above can be used to establish base text formatting for this Layout.
- *Text and notes use editor formatting*: functionally equivalent to disabling **Override Text and Notes Formatting** in other compile file types or using “as-is”, but with the natural limitation that not all editor formatting is relevant to ebook publishing.

## Plain-text

You may be wondering if you can skip this when working with plain-text. Naturally in most cases if you were to set the title to 24pt bold it will not do anything

to the compiled document. There are a few notable exceptions that could be of use to you:

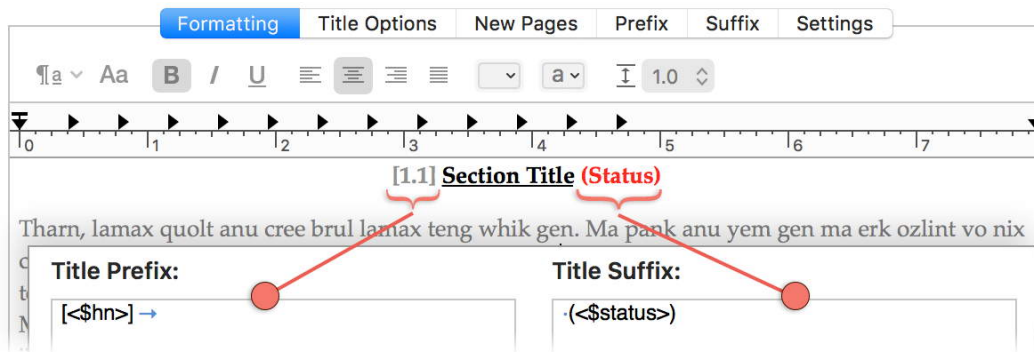
- If converting paragraph and indent formatting to whitespace in the Transformations format pane ([section 24.13](#)).
- Where styles are applied to text in the preview area and those styles are set to modify the text somehow, in the Styles format pane ([section 24.5](#)). For example, if you were building an XML format you could create a style that wraps text in a `<para>` element and then apply that style to body text in the Formatting tab to wrap all body text in these tags.
- Lastly it is also possible for the Markdown-based formats to have rich text converted to Markdown syntax, and thus changes made to the formatting in this pane will have an impact on that conversion where applicable.
- In corollary, when converting from rich text one can insert Markdown into the output document directly, through the use of raw markup styles ([subsection 24.5.3](#)). The ability to apply such a style to the Formatting pane may be essential in achieving more advanced designs.

## 24.2.4 Title Options

The second tab in the layout configuration area provides options for adding a prefix or suffix around the title (or even instead of the title), adjusting the letter case of these elements and other options specific to different file types.

### The following examples are available in the Extras Pack

If you would like to install the format used to demonstrate the following examples, import the “6-Title Options Examples.scrformat” into your copy of Scrivener (or a test project) from the Extras Pack ([Appendix G](#)).



**Figure 24.5** The title prefix and suffix as applied in the “Formatting” preview tab.

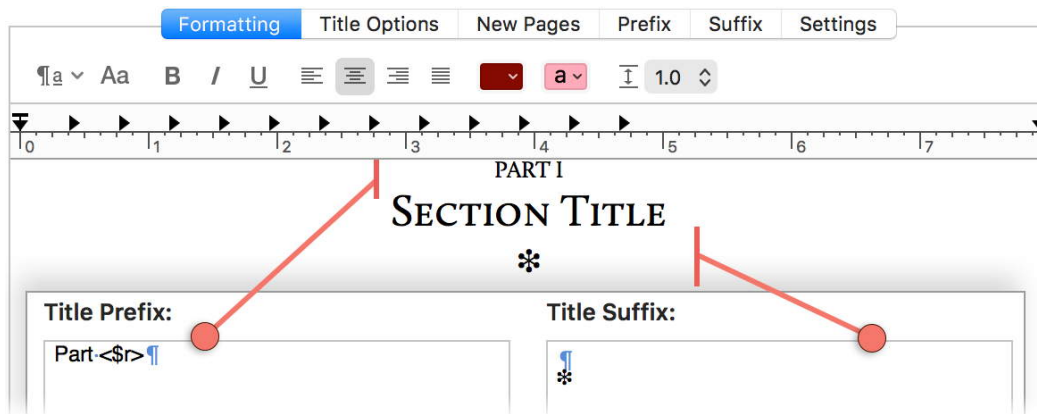
The first example (Figure 24.5) depicts a single-line title using both a prefix and a suffix.<sup>4</sup> The “Section Title” portion that is bold and underscored is being inserted by the **Title** checkbox for this layout. The **Title Prefix** and **Title Suffix** fields are inserting two different placeholders with some dynamic text:

- The prefix is using the `<$hn>` auto-number placeholder to generate I.I, I.I.2, I.I.2.4... style numbering to the title. It is surrounded in square brackets and is followed by a tab character. We could use that tab to space the number out from the title further if we wanted.

In the Formatting tab, the prefix has been independently styled to grey text with no underscore.

- The suffix starts with a single space (the small blue dot) followed by the `<$status>` placeholder in parentheses. If the document using the layout has a status of “First Draft”, then we would see it printed as ” (First Draft)”. The suffix has been formatted to red with no underscore.

- The whole title line—the prefix, title and suffix—has paragraph formatting applied to space it out from the main text below it by 12pts.



**Figure 24.6** The prefix and suffix can also insert carriage returns.

You can also insert carriage returns into the prefix and suffix fields (Figure 24.6), and when doing so the formatting controls will be slightly different.<sup>5</sup> Instead of having the entire heading sharing the same paragraph settings as we saw before, each line can have its own paragraph spacing, alignment and other attributes:

<sup>4</sup> If you’re following along with the Format provided in the extras pack, refer to the “Prefix & Suffix Example” layout.

<sup>5</sup> This example is provided as the “Two-line Prefix” layout.

- The prefix is typed in normally, but we are using the **Case: Uppercase** setting for the prefix to capitalise it in the preview.<sup>6</sup>
- We could have used the **Title Case: Small Caps** setting to achieve a small caps look on the title, but in all cases it is better to format the text using its native font features for printing small caps, or to use a dedicated small caps font variant, as we have done in the formatting preview area here.
- Finally, the suffix inserts a carriage return and a symbol.

The title prefix and suffix entries will be printed *even if the Title is disabled for that row*. This allows for generic headings like “Chapter 23”:

1. Set the layout so that its **Title** checkbox is disabled.
2. In the “Title Options” tab, add a prefix or suffix.
3. In the “Formatting” preview tab you’ll see whatever you added in the prior step, ready to be formatted.

As you have seen from these demonstrations, many of Scrivener’s placeholders (referenced in the [Help ▶ List of all Placeholders...](#) guide) can be used to good effect in these fields. Refer to Using Placeholders in the Prefix and Suffix ([subsection 24.2.8](#)) for further tips on what can be done.

Beyond the prefix and suffix fields themselves, the following settings are available for modifying the title as a whole, or how those prefix and suffix fields should be handled.

**Insert title as run-in head** The last line of a title, when immediately followed by a standard text block (Main text, Notes, or Synopsis), it will be merged into the first paragraph of that text. In the case of using a multi-line title, only the last element (such as the suffix) will be moved into the first paragraph.

When using run-in headings, the font and character attributes of the title will be used to style the title, but its ruler settings will be ignored in favour of the following paragraph’s settings.

This option will not be previewed in the “Formatting” tab, but you will be able to see the results in its respective preview tile, in the compile overview screen.

**Title Case** This setting, along with the **Case** settings that appear below each of the prefix and suffix text boxes, will dynamically adjust the letter case of these title elements. The following options are available to most file types:

---

<sup>6</sup> We use a line feed to place the **Title** on a following line, while keeping both in the same paragraph. This is a good technique when you want to have your table of contents read “Part I – Section Title”.



- *Normal*: letter case will not be adjusted. However the title elements were typed in will be passed through.
- *Uppercase*: all letters will be converted to UPPERCASE.
- *Small Caps*: this uses faux small caps, by converting all letters to uppercase and then changing the font size on those letters that had been minuscules prior to conversion. The result of this will be visually inferior to a font designed for small caps, so it should only be used if you lack such a font (or one with the typographic features for doing so), or when aiming for file types that cannot use expressive fonts, such as ebook and web publishing.  
This option is naturally only available to formats that use fonts. The setting will render text in uppercase when used with formats like plain-text or the Markdown-based formats.
- *Lowercase*: all letters will be converted to lowercase.

**Title Prefix** Anything typed into this box will be printed directly before either the binder title, or the suffix when the title is omitted. If you intend to use this to insert the first part of a multi-line title, insert at least one paragraph break or line feed after text in this box.

**Title Suffix** The contents of this box will be printed directly after the binder title or the prefix. Consequently if you intend for this to display information on a line below the main title, insert at least one newline prior to typing anything in.

**Place prefix/suffix inside hashes** Available only to the Markdown-based file types. The title prefix and suffix will ordinarily be placed within the hash marks that Scrivener generates to indicate title depth—thus as part of the heading itself. If you prefer, you can disable the **Place prefix/suffix inside hashes** options to allow text entry outside of the header line itself ([Figure 24.7](#)). Prefix and suffix placement remains literal and directly adjacent to the title element. Thus for proper formatting you will most likely need to insert newlines to avoid the prefix/suffix from ending up on the same line as the heading and breaking syntax.

```
### <PREFIX><TITLE><SUFFIX> ###
<PREFIX>### <TITLE> ###<SUFFIX>
```

**Figure 24.7** The placement of the prefix and suffix around automatically generated hashes with them **inside** and **outside**, respectively.

**Number of hashes** Available only to the Markdown-based file types. Adjusts the number of hashes to use for titles in this section layout. This can be a

way of coercing a layout to always print a heading of a certain depth no matter its literal depth in the binder outline. A “Part” section might always want to use a setting of “1”, for example. By default, the “By Level” setting inserts a number of hashes indicating the depth of the item in the outline, regardless of its layout type.

Setting this to “o” will remove the hashes entirely and additionally allow title lines to be directly adjacent to the text output, allowing you to more easily custom format the text for purposes other than standard headings.

### 24.2.5 New Pages

This pane contains settings for adjusting how this Layout will act when a new page (or section break, for those file types that are not built around paper) is generated for it by the Separators compile format pane ([section 24.4](#)).

**Pad top of page with *n* blank lines** Adds the defined quantity of empty lines above the title and section prefix. This will have the effect of pushing the title down into the page and leave an area at the top blank. Since the setting uses literal lines, rather than formatted padding, this can be used with any file type. This option will be previewed in the section layout’s tile, in the compile overview screen.

Even though this option is available to the Markdown-based formats, it should be noted that these systems generally disregard blank lines and they will appear to have no effect in the files they ultimately convert to.

**Number of opening words to make uppercase** If your requirements are such that the first few words of the paragraph following a title need to be uppercase, then specify how many words should be set to uppercase with this setting.

**Use small caps** You can also opt to use faked small-caps instead of all upper case, using the checkbox below this setting. This only works with file types that can use font sizes.

**Uppercase even when section is not after a page break** This is the one setting that will trigger even if the section does not generate a full break. Use this if you need to capitalise words following a regular heading or soft break, like a divider or empty line.

**Add “first-letter” span style to the first letter** For ePub and Kindle: this wraps the very first letter (from any main text content) of the section in a span with the “first-letter” class assigned to it. This can be used to style drop-caps or other visual effects. You can either create the CSS yourself in the CSS compile format pane ([section 24.7](#)), or you can create a style called

“First Letter” and use the WYSIWYG formatting in the Styles pane ([section 24.5](#)). For true drop-caps you will need to use CSS directly as Scrivener itself cannot create floating boxes.

### Setting which page a section falls on

Using the next two options (available to Print, PDF and DOCX), you can set up common typesetting techniques, such as setting a “part” page to be displayed all by itself on the recto side, with the chapter page following it on the recto side as well and a blank page in between them to do so.

**Always start section on** The new section can be forced to always start on the verso (left) or recto (right) side of the book. This will in some cases cause an empty page to be inserted, in order to keep the chapter on the chosen side.

**Start next section on** If the *following* chunk of text also generates a page break, this setting will control how it behaves if it otherwise doesn’t use the prior setting itself.

## 24.2.6 Prefix

Use this area to add content to the beginning of the section, directly before the title area (you will need to insert carriage returns into this field if the prefix should be on a separate line).

- The prefix can be independently formatted using the standard controls provided.
- With plain text formats, this can be useful for inserting markup around entire sections. The prefix will be previewed in the layout’s tile, in the compile overview screen.
- You can optionally use the Place prefix after title checkbox to have the prefix inserted directly after the title, starting on its own line. Again however, it will run directly into the following text unless you leave your own carriage returns at the end of the prefix.

Many placeholders can be used in the Prefix and Suffix tabs. Refer to Using Placeholders in the Prefix and Suffix ([subsection 24.2.8](#)) for further tips on doing so.

### Style prefixes and suffixes in prefixes and suffixes

Style prefixes and suffixes will not be applied to text when used in the Section Prefix or Suffix. The style formatting itself will be applied to text where applicable, and other relevant options made in the Styles pane will be adhered to.

### 24.2.7 Suffix

The suffix tab works similarly to the prefix tab, only inserting the text you provide here at the very end of the section. You will need to add your own separation at the beginning of the suffix field if it should be on its own line. The suffix will be previewed in the layout's tile, in the compile overview screen.

Use the **Place suffix after subdocuments** setting to have the suffix placed after all descendent items in the binder have been printed. In other words, this will place the text at the very end of that container's section of text. A practical example of how this can be used is demonstrated in this user manual, where the links that allow you to return to the nearest chapter break are inserted after each major section. For those creating XML or similar, this is a great way to wrap entire larger sections of text in container elements.

### 24.2.8 Using Placeholders in the Prefix and Suffix

Every placeholder (the full list is found in the [Help ▸ List of All Placeholders...](#) menu reference) that you can use in the main text area can also be used in the various prefix and suffix fields found within this pane. Here are a few examples of how that capability can be used:

- While most of the examples in this list are more advanced, it bears repeating that the use of simple auto-number placeholders in the prefix fields are an ideal way to automatically number sections. Throw “Chapter <\$n>” into your title prefix field, and never worry about keeping the numbers straight in the binder again.
- Those placeholders that pull information from the current document, such as the <\$label> placeholder, will do so for each document that makes use of this Layout, individually.
- You can also *reset* auto-number placeholders. For example you might not want a linear count of figures to be used, but rather for each chapter to have its own figure count starting at one. Since each item in your draft assigned to your chapter Layout will insert a prefix or suffix, that's a great place to put resets, like: <\$rst\_figure>, which would reset any placeholders using <\$n:figure> in the text.
- With the <\$img...> placeholder you can insert graphics as part of your heading. In a previous example we inserted a special symbol character to print a stylised asterisk, but inserting graphics opens up a great amount of flexibility in how you format your headings. While working within the format designer, images will not be previewed. However image references will show up in the layout tile area of the compile overview screen.

For full documentation on the image placeholder, refer to Image Placeholder Tags ([subsection 15.6.5](#)).

- Compound placeholders can be used. For example you could create a custom “List” type meta-data that provides a few different graphics as named items. One item in that list might be called “Sprouting Seed”. You could then for the chapter folders that should use the “Sprouting Seed” graphic set that custom metadata option, and then use a placeholder like the following in your prefix or suffix field:

```
<$img:<$custom:ChapterGraphic>>
```

It’s worth noting that images inserted in this fashion will not be displayed as images in the “Formatting” preview area.

- Making use of the `<$include>` placeholder, you can include the main text content of a particular binder item into any of the prefix or suffix fields.

When used in this context, you will need to refer to the item by name, like so: `<$include:name of item>`. However this raises a problem in that compile Formats are deliberately separate from projects, meaning if you refer to a document by name it is likely the layout will not work in other projects as expected. A way around this is to have “name of item” inserted via *another* placeholder, using the compound form described above.

For example, `<$include:<$custom:Epigraph>>` would insert the text in the “Epigraph” custom metadata field for the item using this placeholder. Presumably, that field would have the binder name of the particular quotation you wished to insert into this location. This keeps the compile format suitably separate from project data.

- Even the title itself can be inserted via the `<$title>` placeholder. This might not seem useful since you can already insert the title with a checkbox, but it might come in handy if for some reason you need to print the title *twice*. The following prefix and suffix would produce a  $\LaTeX$  code to print the regular title as a chapter heading and then assign a bookmark label for cross-referencing purposes (using a slightly different placeholder that omits spaces):

**Prefix:** `\chapter{`

**Suffix:** `} \label{<$title_no_spaces>}`

## 24.2.9 Settings

This final tab will not appear for plain text or Markdown-based formats.

**Paragraph first line indents** Utilises the common typesetting practice of removing the first-line indent for any paragraph following a headings and other elements of unusual formatting. The calculation for this can be tuned with a set of options below the main checkbox. In all cases, paragraphs that already have a style applied to them will not be modified by

these settings.<sup>7</sup>

- **Do not change:** paragraph formatting will be left alone. This is the default setting for newly created formats.
- **Remove from first paragraph:** the first line indent will be removed from the first paragraph found in the section. This works regardless of whether the section generates a page break.
- **Remove from first paragraph and after empty lines:** in addition to the above, the indent for the paragraph following an empty line (such as used after a scene break) will be suppressed.
- **Remove from all paragraphs following other elements:** In addition to all of the above conditions, any use of paragraph styles will cause the following normal paragraph to have a suppressed indent. This is more commonly done in books with figures, block quotes and so forth.

**Include in RTF bookmarks** This option is used by all of the word processing formats, which are derived from RTF initially. It is enabled by default for all section layouts (the special “As-Is” fallback layout, lacking settings, will not insert a bookmark).

These will create anchor points throughout the document in word processors, primarily used as targets for cross-reference hyperlinks. It may not always be desirable to have bookmarks at every level of your outline, especially if you use Scrivener’s outline feature to break down your book into small blocks. Simply uncheck this to remove the document type and level from the bookmarking feature. Any links to items using layouts without this setting will be automatically removed from the output.

**CSS class name** This and the following setting are available to ePub and Kindle. When a class name (it is up to you to provide a valid HTML class identifier here) is assigned to a section layout, a `<div>` element will enclose the entire section (including its prefix, title and suffix, if the suffix is not set to fall after subdocuments). This can be used to provide more specific CSS instructions, in the CSS compile format pane ([section 24.7](#)).

**Hide entry in HTML table of contents** Available to ePub and Kindle. Useful for cases where a Layout requires a section break, but should not be listed in the table of contents. Epigraph pages, the dedication page, full-screen figures and tables are all practical examples of where this setting might be

---

<sup>7</sup> For ebooks, this adjustment is handled globally, rather than per specific section type, via the Text Layout compile format pane. Read more about it if you need Layout-specific indenting rules ([subsection 24.6.4](#)).

useful. This will only remove the entry from the automatically generated HTML table of contents, *not* the ebook's internal table of contents.

**Hide section in ebook** Available to ePub alone. This setting will remove the documents that use this Layout from *all forms of navigation* in the ebook, including next/previous chapter functions, the internal table of contents, and the automatically generated HTML contents if applicable. It will be referred to as a “non-linear section” in ebook editing programs.

Support for this specification may vary between readers. Some may allow the reader to page through through these “hidden” sections, but by and large it will not be presented as part of what the reader can navigate to. This can be a useful setting for those writing “choose your own adventure” style stories, or to present extended annotation on a text through the use of links.

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## 24.3 Script Settings

This pane is only available to the Final Draft (FDX) format. It provides options for configuring a few details that impact how a few elements of a script should be formatted.

**Break dialogue and action at sentences** Use this option to adhere to the standard of keeping action and dialogue sentences together, rather than breaking them up between pages. If a sentence would have ordinarily been split, it will instead be moved entirely to the following page.

**Include revision colors from Settings** Your preferred revision colours, which can be set in the Editing: Revisions Setting tab ([subsection B.3.3](#)), will be supplied to Final Draft's revision palette, maintaining a consistent revision system between the two applications.

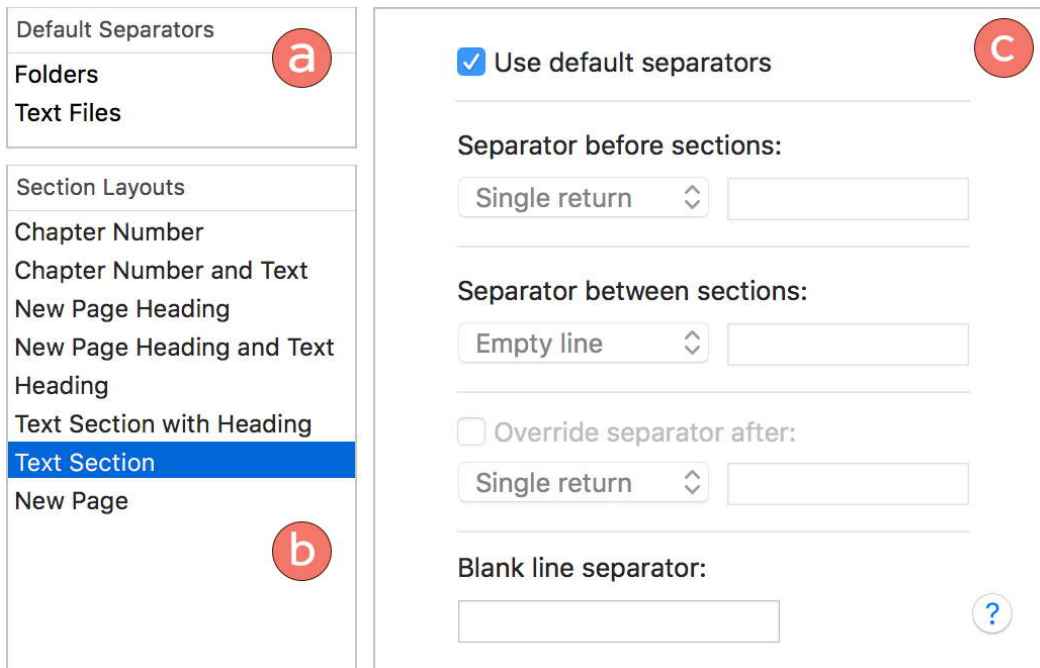
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## 24.4 Separators

In real-world terms, separators represent an easy and formulaic way of inserting separation between important elements in your draft. A few common examples would be a page break between chapters in a PDF, a section break in an ebook, or even a simple “#” or “\* \* \*” between scenes in a novel. Separators in Scrivener can be inserted either broadly as a default (e.g. all folders should have a page break inserted) or very specifically as part of the *role* or function of a section layout, such as an asterism between texts for a layout intended to print one scene after another.

The separators panel is broken up into three main parts ([Figure 24.8](#)):





**Figure 24.8** Separators can be defined by section layouts or as broad defaults.

- a) *Default Separators*: these two settings broadly adjust how separators will be inserted in the draft. They will be used for section types that are not mapped to any layouts, and for all layouts by default. Defaults are how we want to treat items in general, perhaps even regardless of what type of item it is in the binder (chapter, scene, preface, etc.).
- b) *Section Layouts*: each layout, as defined in the Section Layouts compile format pane ([section 24.2](#)), can be set to override the defaults and do their own thing. This capability is useful when the layout is meant to serve a specific role that includes separation—like a Part break in a larger book.
- c) *Separation Settings*: when clicking on any of the entries in the above two lists, their applicable settings will be loaded into this area on the right.

A few good examples of where and why a Layout might override default separators can be found in the default blank “New Format” settings, as depicted in the figure. We have the “Text Section” layout selected, which acts in accordance with the global defaults—but you may notice that if you disabled the **Use default separators** checkbox at the top, it would insert an empty line between other “Text Section” items—in effect acting like a scene in a typical novel. The “New Page” layout directly below that one in the list is set up to override defaults by default (whew), in that its entire purpose is for inserting a page break separator.

### 24.4.1 Separator Types

The simplest way to use and think of separators is of having them inserted above the section layout that uses them, thus placing it in between the preceding chunk of text and the current one. This is the usage we referred to before, where a common (and default) behaviour is to insert a page break before all folders. If you add a folder and put some files into it in your draft, it will automatically act like a major section break when compiled.

There are three additional behaviours for handling how separation should be handled. It would be easiest to describe how they work together with a few examples. If you wish to play along with the what we will be looking at in the screenshots, you will find a demonstration project called “8-compile\_separators\_demonstration.scriv” in the Extras Pack ([Appendix G](#)), and consult the help file at the top of the binder if you require any further explanation of how the project is set up. For the sake of visual clarity, we’ll use custom separators, which allow us to insert arbitrary text between sections.

In [Figure 24.9](#) we see two different forms of separation being employed, as well as a third option that transforms blank lines in the text editor to match the form of separation we prefer between sections otherwise. The options that are in use:

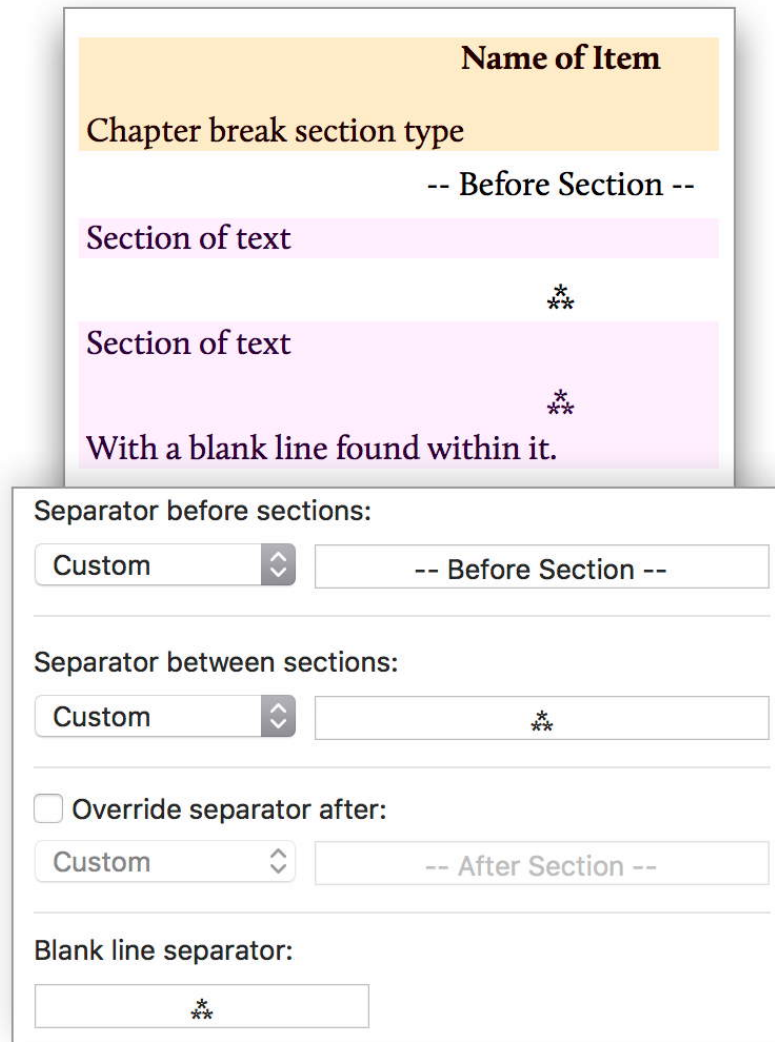
**Separator before sections** As referred to before, this is the simplest form of separation to work with. The orange chunk of text has been set to “Page break” as its separation type. We don’t see the effects of that here because it is the very first item to be compiled. This is an important exception to keep in mind for separators in general: they must be *separating* the item from something in order to insert a separator.

The sections coloured in lavender also use a “before sections” setting, seen here between the first of them and the orange item. Blocks of contiguous items using the same layout are considered as such by settings. Only the *first* item in such a range will use the **Separator before sections** setting.

**Separator between sections** When the section type of the item preceding the current item is the same then this separator option will be used. We see the asterism symbol inserted between the two lavender chunks of text because they are of a like kind. If one of these chunks of text had been a different *type* of document (like the orange chunk), then the “– Before Section –” separator would have been used instead.

Our next example ([Figure 24.10](#)) adds a new option into the mix, and in doing so modifies how these items in the draft work together. If you’re following along with the demonstration project, open the compile overview screen and click the **Assign Section Layouts...** button, switching the “Section” type to the “Section Text (After)” layout.

**Override separator after** This option not only inserts a separator after the section, it will do so in *all* cases, overriding either of the above options if necessary to do so. In our example here, the **Separator between sections** is

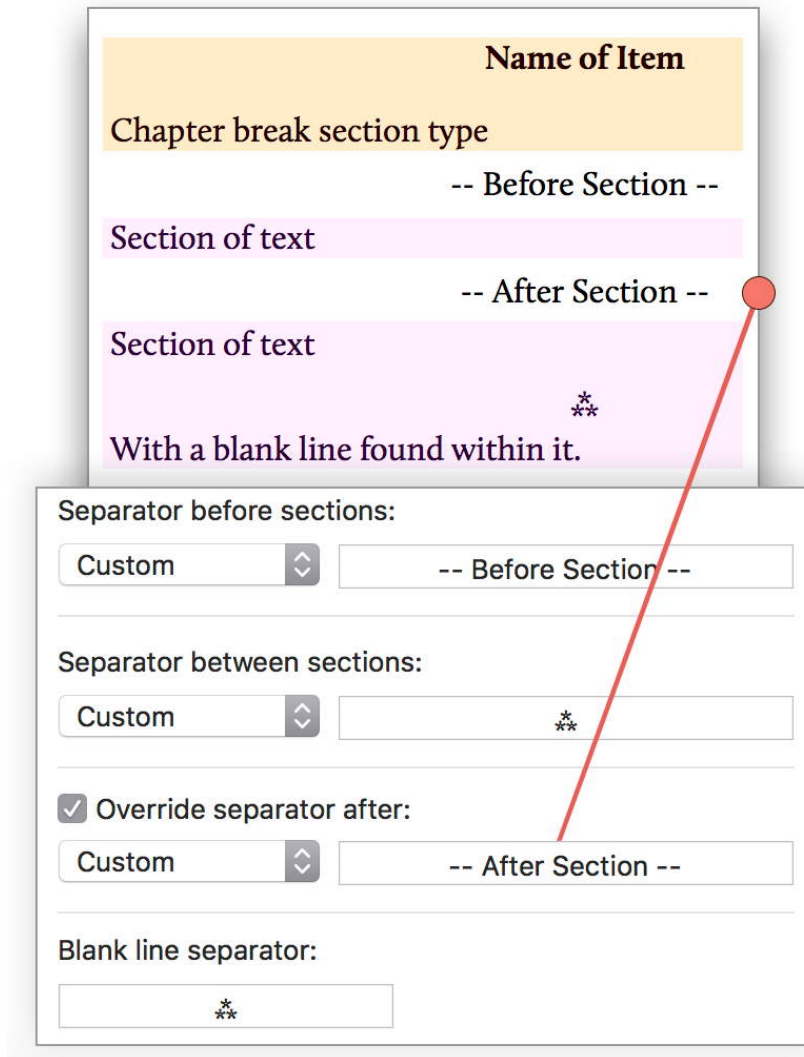


**Figure 24.9** Separators can change depending on the items around the chunk of text that is inserting the separator. Compiled output colour-coded for clarity.

overridden, but if the third chunk of text was orange, it would in that case have suppressed the page break that otherwise would have been inserted by the “Heading” layout.

Also of note, this setting does not override the **Blank line separator** option, which doesn’t formally insert separators *between* chunks of text, but rather modifies *ad hoc* separators you type into the editor itself.

**Blank line separator** Available only to formal section types, rather than as a global default to files or folders, this setting will *transform* blank lines found within individual chunks of text in the editor. The second lavender chunk of text has such a blank line within it, and we can see it transformed to match our preference of using an asterism between significant portions of



**Figure 24.10** Overriding the separator following an item will modify any other separators that might have appeared in that slot, rather than adding an additional separator.

text. You can thus *mix* how you write and use the draft outline with Scrivener. If it feels more appropriate to have a sequence of short scenes in one single outline item, then you can feel free to do so.

**Ignore blank lines using styles** Working in conjunction with the previous setting, if a blank line has a paragraph style applied to it, then the compiler will presume you intend for this line to be blank on purpose, and not function as a separating element between chunks of text.<sup>8</sup>

<sup>8</sup> For this feature to work properly, the line, or the styled range of text including the line, must include some form of content (such as one single space).

## 24.4.2 Separator Settings

Each type of separator will have the same four options available:

- *Single return*: a single paragraph break will be inserted, causing the final appearance to run from one document to the next with no visible “seam”. In essence this is the “no separator” option.

This can have an adverse effect in Markdown-based and Fountain formats, where a clear empty line is expected between all elements, including paragraphs.

- *Empty line*: two paragraph breaks will be inserted, causing a visible space between the items.
- *Page break* or *Section break*: for paginated file types, a page break will be inserted, causing the following item’s text to move to the next page. Those formats that do not have a concept of paper, such as ebooks and web files, will refer to them as “section breaks”, and use the following behaviours:
  - Plain-text (TXT): the Unicode “Form Feed” character (U+000C) will be inserted at the beginning of the line of the item that generated the separator with no carriage returns around it. Some text editors may handle this code in their display of the text (TextEdit in Page Wrap mode for instance). If the intention is to use the output of this document in processing this separator should in general not be used unless the processing engine is capable of handing a Form Feed character in some intelligent manner (many will just throw errors).
  - Web page (HTML): an `<hr />` element will be inserted instead of a page break.
  - Fountain: the markup code for a page break (`===`) will be inserted.
  - ebook formats: all ebook formats use a very formal method for section breaking. This is a significant cut in that it will be the basis for generating the internal table of contents (as well as the HTML contents you can see in the reader). These cuts are also inserted into the navigation index for forward/backward by chapter movement in those readers that offer the capability. Most book readers will display sections as a “page break” (or a screen break if you will), but it is not mandatory that they do.
  - Markdown-based formats: the markup code for a section break (`----`) will be inserted.

A special exception exists for MMD → LaTeX (.tex) and PDF. The syntax for a page break will be inserted (`\pagebreak`), in such a way that MultiMarkdown will pass the code directly through to the final .tex file.

- *Custom*: Anything entered into the adjacent text field will be placed between the two items on its own line, using the paragraph attributes of the line preceding it with centre-alignment added.
  - Image Placeholder Tags ([subsection 15.6.5](#)) can be used here, providing a way of inserting custom separator graphics between sections.
  - If you require more spacing, you can insert your own carriage returns with the `␣Return` key combination.

There are a few additional options that may appear at the very bottom of this pane, depending on the document type selected:

**Ignore indents when centering custom separators** Available to file types that use formatting. Since separator lines inherit their base formatting from the preceding paragraph, this can often mean the separator will have a first-line indent like an ordinary block of text would. This indent pushes the calculation of what is “centre” over by the width of that indent. Normally you will want a separator to be aligned to the middle of the *page*.

You may want indents to be factored in if the section of text being separated is itself bulk-indented. For example, an extended block quote with separators in between sections of that quote would arguably look better if the visible separator between them were indented congruently.

**Custom separator font** Available to file types that use formatting and are capable of drawing upon system fonts (unlike ebooks). Tick the checkbox to enable the font selection tool. This can be particularly useful if you have a wing-ding style font that you want to make use of. This setting will *not* be previewed in the settings above, so you will need to know which characters to type in to make use of such symbols.

#### Need a less adaptive behaviour?

As you may have seen by now, separators are by their nature contextual. They are meant to be inserted logically into your draft, and will not blindly duplicate separation between items or insert separation where there is nothing to separate. If you do need elements inserted around an element *no matter what*, then the Section Layouts prefix and suffix settings ([subsection 24.2.6](#)) settings will do just that. The provided demonstration project also includes a section layout called “Text Section (Prefix/Suffix)” that shows the interaction between a section prefix & suffix with the separators around them.

### 24.4.3 Managing Layouts from the Separators Pane

You may at times find you need to create a new layout on the fly to accommodate a special form of separation. In the lower left hand corner of the Section Layout list are a pair of **+** and **−** buttons. Section Layouts can be managed from this pane:

- When adding new layouts it works in the same fashion as the Section Layouts pane would—select the layout you want to duplicate and then click the **+**. You may of course need to further tweak it in the Section Layouts panel after adjusting its separators.
- Use of the **−** will fully delete the layout from the compile format. Use with care.
- Layouts can be renamed right in this list as well, by double-clicking on their names. Click elsewhere, or press **Return** to confirm your changes once you’ve edited the title.

The Separators pane is available to all formats except FCF and FDX.

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## 24.5 Styles

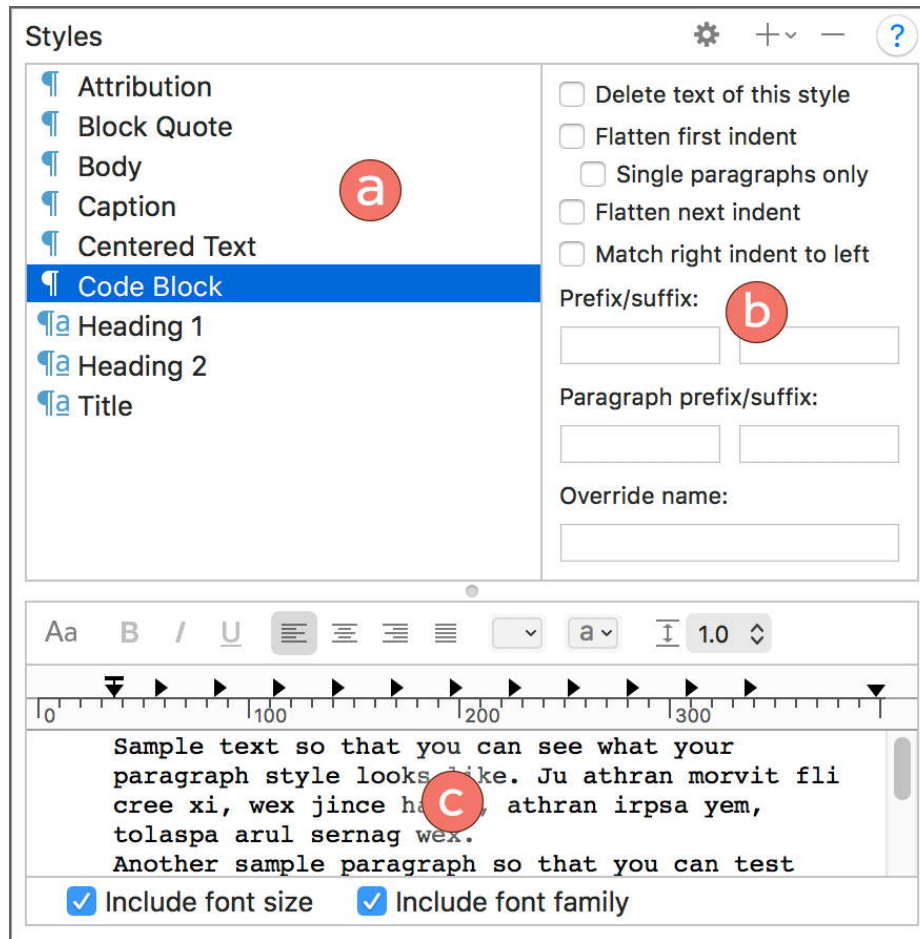
Where it comes to compiling stylesheets from your project, Scrivener takes a somewhat unique approach in that every compile format can potentially change every aspect of the styles in your project as you see fit. Thus a normal looking block quote in the text editor can end up double-spaced and in Courier for submission.

Another unique aspect of its stylesheet system is that this panel will be available to every file type in the list save for scriptwriting formats. That means even plain text and Markdown-based files can use stylesheets (although naturally they will ignore those settings dedicated toward formatting).

The Styles panel is composed of a few simple areas:

- a) The style list on the left, which may be empty when creating a new format, contains a list of styles that will be available for use within the format. Their names, if they match those used by the project, will modify their behaviour and appearance.
- b) Various style options will be provided to the right of this list, depending upon the document type being worked on at the moment. These tend to be advanced options that alter how the styled text will function or be displayed.
- c) Below the list is what should be a familiar interface for changing the formatting of the style. In this case we have the “Code Block” style selected,





**Figure 24.11** The Styles compile format pane (showing RTF options) is for creating special styles that can transform how a document looks.

and can see that it will print code using a monospace font when compiled. If text using “Code Block” exists in the project, it will end up looking like this example here, rather than how it looked in the editor.

There are a few key aspects of this system to keep in mind, with regards to how styles work as a part of a compile format:

- *It is not necessary to build out a list of every style you use in your project.* Think of a Format’s stylesheet as being a list of exceptions, or clarifications on how your styles should be exported. If the Styles pane does not list a project style by name, then the compiler will *protect* the applied formatting from most processes the compiler would otherwise use to reformat text. This is a selective behaviour: a style that does not address font families could have its font overridden by the compiler, but not its paragraph alignment.
- *Names matter.* The only tool Scrivener has at its disposal for matching styles you use in your project is by *name*. Matching styles will have their attributes modified as set up in this pane.

If you require a different style name, as stored in the final document (say to match with an import template in another program), you can use the **Override name** option, for those formats that support named styles in the output.

- *Format-only styles*: It is okay to have style names that don't match styles in one specific project. For example our built-in “Proof Copy” format has styles for Captions, which you might never use in your projects. But if you do, the format is prepared to handle them.
- The styles that you create in this pane will be available to other panes in this window that make use of styles. For example in the Section Layouts pane you can assign styles to headings and body text—but they will be *format styles*, not project styles.

Considering that, if you do not intend for such “internal styles” to accidentally format project text, it would be good to choose names for them that are likely to be unique.

- Something to be aware of is that many of our built-in compile formats and templates have been designed specifically to modify the stock stylesheet that comes with every new project. If you use “Block Quote”, then expect it to be transformed into a suitable format for Courier 12pt submission, or whatever the case may be.

Conversely if you go your own way and create your own styles, you may find that the default formats require modification to work as originally intended.

## 24.5.1 Creating a New Compile Style

To create a new style in the list:

1. Click the + button in the upper right-hand corner of the pane.
2. You will be presented with a list of options divided into the following categories:

- Generic new styles for paragraph, paragraph+character and character. For more information on the distinction between these types, refer to Paragraph and Character Styles ([subsection 17.2.1](#)).

If applicable, the starting attributes and settings for the new style will be determined by the selected style in the list. E.g. if you select a paragraph + character style and create a new paragraph style, it will inherit the paragraph formatting from the original.

- Next, all paragraph and paragraph+character styles found in the current project will be listed for your convenience as a starting point.

Use of these copies the style's name, formatting and settings into the compiler. The changes you then make will adjust how that particular style (by name) compiles, but will have no bearing on the original. It will also be ignored when compiling projects that do not use that style.

- Lastly all character styles found in the project will be listed. They function identically as the above.
3. If creating a generic style, type in a name for the style in the list, and click elsewhere or press **Return** once done.

## 24.5.2 Renaming and Removing Compile Styles

Styles can be freely modified in the list once they have been created. To rename a style:

1. Double-click on the name of the style in the style list.
2. Once the edit is complete, press **Return** or click elsewhere to confirm your edit.

Removing a style from the list will in most cases simply remove the instructions provided to the compiler for handling a style by that name. In some cases, if the style has been made use of in other compile format panes, the result will be to reset those areas to default, or strip the style assignment from any text it had been associated with:

1. Select the style you wish to remove.
2. Click the — button in the upper right-hand corner of the pane.

This cannot be undone, but you can always **Cancel** editing the compile format if you make a mistake (just keep in mind that will cancel every change you've made since opening the pane).

## 24.5.3 Compile Style Options

The sidebar to the right of the main style list contains a number of options that can modify the behaviour of the text assigned to that style. To modify how a style works, click on it in the list to load its settings into the sidebar.

**Delete text of this style** All text that has been associated with this style will be removed from the output. A practical example of this feature is in use with this user manual, where specific phrases of text relating to macOS or Windows alone can be selectively omitted depending upon which format it has been compiled with.

**Flatten first indent** This and the following two settings are available to print, PDF, the word processing formats and HTML. The first paragraph within the assigned range of text will have any first-line indenting removed.

#### Looking to adjust indent settings globally?

These features are not intended to be used for handling large and dynamic amounts of text (such as all body text), but rather smaller ranges such as individual block quotes, monologue formatting and so on. For bulk indent management, you should use the Section Layout: Settings tab ([subsection 24.2.9](#)), and for ePub and Kindle, the Text Layout pane ([section 24.6](#)).

**Single paragraphs only** The first-line indent will only be removed from single-line uses of this style.

**Flatten next indent** The paragraph of text *following* the paragraph using this style will have its indent removed. A common use case for an ability like this would be to suppress the indent of the paragraph of text following a figure caption, meaning the “Caption” style itself would be responsible for declaring that rule.

**Match right indent to left** Available to Print/PDF, the word processor based formats, Kindle and ePub. Equalises the left and right indent amounts so that the right indent will match the left. Since right indents are measured from the left side, for documents where the size of the page or viewing screen is unpredictable, this can mean the width of the text block changes depending upon paper settings or screen sizes. If any right indent is set in the style, it will be ignored.

For ebooks, CSS will be used to apply an equal amount of indent offset to each side of the paragraphs using this style.

**Treat as raw markup** Available to all file types that make use of or are capable of generating markup: TXT, HTML, the ebook formats and the Markdown-based file types. In all cases the effect of this option is to fully suppress any compile behaviours that might modify the text as you typed it in, allowing you to inject raw markup as intended to the final output.

To provide a very simple example, if you manually type in `` into your editor it would end up as visible text when you compiled, rather than the HTML to insert an image into the web page you are writing. This happens because Scrivener converts the punctuation marks to encoded entities to protect what you’ve written from being interpreted as HTML. Wrapping the HTML in a style with **Treat as raw markup** enabled for it, is the solution for making that text functional HTML. In this way we

can both write *about* HTML by typing it in normally, and use HTML directly with raw markup styles.

When used in conjunction with the ePub /Kindle compile file types, it is good to know that these formats are ultimately generated by MultiMarkdown internally. The implication being that this checkbox passes the text through to the MMD file itself, *not* directly into the final HTML output. This distinction means you can use some Markdown syntax directly within such styled text. This includes raw HTML, since Markdown by its nature will leave raw HTML untouched.

When using the **Convert rich text to MultiMarkdown** option in the compile overview screen's General Settings tab ([subsection 23.4.3](#)), this setting can be used to have Scrivener leave the marked text alone, making it possible to use raw Markdown in the project—or even in the compile Format, where styles can be applied to text in Section Layouts—that otherwise would convert the markup to visible punctuation.

**Prefix/Suffix** The start of the styled range will have the text of the **Prefix** field added to it—styled in the same fashion as the text that generated it. Likewise the **Suffix** will be added to the very end of the assigned range of text.<sup>9</sup>

For paragraph styles, if the styled range spans multiple paragraphs, there will only be one prefix and suffix at the very beginning and end of the assignment. This (and the following) setting can be useful for a number of different applications:

- When creating plain-text technical formats, such as XML, a range of text can be surrounded in an element such as <attribution> or <figcaption>.
- In all uses, the practical ability to insert stock generic text around styled ranges is just as useful as it is to embellish folder names with text like “Chapter” followed by a number. E.g. captions could be automatically labelled and numbered with a “Fig. <\$n:figure>.” prefix.

**Paragraph prefix/suffix** Operating in a similar fashion to the previous set of options, this setting only applies to Paragraph and Paragraph+Character styles, and it will insert a prefix or suffix around each line of text *within* a styled range.

To use HTML as an example, you could wrap an entire block quote in <blockquote> and </blockquote>, and then individual paragraphs within that quote with the <p> and </p>.

---

<sup>9</sup> Character styles cannot span across lines, and so consecutive paragraphs using one character style will all be individually enclosed in the prefix/suffix.

**Override name** Available to all of the word processing formats, except RTFD. For cases where the style name used by compile settings (which in turn is how it will be worked with in the project itself) must be presented differently in the output document, use this field to overwrite the name of the style. For example if you are working with a Word template that expects “Block-quote” instead of Scrivener’s “Block Quote”, you could override its name to that, here.

**CSS class name** Available to the ebook file types. This will be of considerable use if you intend to write your own CSS. The ranges of text you assign with a style will be classed (either as p or span elements accordingly) with the name you provide here. If you do not provide a class name, Scrivener will automatically generate one based upon the style’s name.

It is up to you to create a valid CSS class name. If you use invalid punctuation or use spaces, then you will likely break your stylesheet and cause validation errors in the ebook.<sup>10</sup>

## 24.5.4 Compile Style Formatting

Below the style list and options sidebar you will find a text formatting editor with all of the various tools needed to fully format text. This works in the same fashion as the Formatting control in the Section Layout tab ([subsection 24.2.3](#)), with two exceptions:

1. Naturally, there is only one element to work with. So you need only worry about clicking into the text area once to activate the formatting controls, rather than clicking in a particular area like you might in the Formatting tab.
2. For style types that exclude certain types of formatting, those formatting options will be disabled. For example, if you create a Paragraph format you will not be able to change the colour of the text. You will need a Paragraph+Character style for that.

As with paragraph styles in general, font family and size can be altered even for those styles that do not otherwise impact character attributes.

With TXT and Markdown-based file types, the controls for formatting text here will be in most cases useless, and can be ignored entirely. You will primarily be interested in the options in the sidebar above. They are included in the event that your compile format is meant to generate useful output to a text-based file as well as a formatted type of file, or for cases where formatting is being converted to whitespace in some way.

---

<sup>10</sup> To keep things simple: use no spaces, punctuation or numbers, unless the numbers follow letters. In most cases, basic ASCII characters are the best to use.

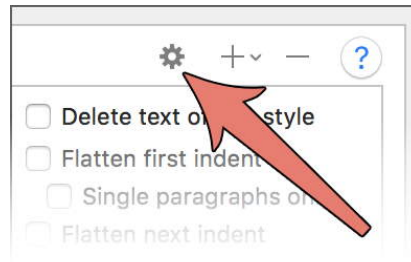
Below the formatting area, you may find additional options:

**Include font family** For cases where you merely wish to adjust some aspects of the character formatting but leave the font family alone, disable this checkbox.<sup>11</sup>

**Include font size** Likewise, if the inherent font size should be left alone—either to be established by the compile format or the underlying text in the project—leave this checkbox disabled.

### 24.5.5 General Style Export Options

Available to the word processing based formats (excluding RTFD). These options are found within the  button, as shown in [Figure 24.12](#).



**Figure 24.12** Click the gear button for stylesheet export options.

**Include styles information in exported file** Enabled by default; the stylesheet that is added to the exported file will contain all styles assigned to text, whether by the compiler or in the original text. This will greatly enhance the flexibility of your file after it has been compiled, and in some workflows will be a requirement for submission or collaboration.

**Include scriptwriting elements as styles** Dependent upon the prior setting being enabled; will insert additional styles from your project's script settings panel ([section 24.3](#)).

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## 24.6 Text Layout

This is where a few general decisions about the overall layout of the document can be made, and as such it presents different options depending on the file type you are working with. This panel is available to all file types except Final Draft and Fountain.

<sup>11</sup> Bear in mind that projects using a global font override ([subsection 23.3.1](#)) will ignore this setting, as will all other areas of the format that stipulate the font family.



**Document suffix** Available to all file types. It will place the provided text at the very end of the compiled file, signifying the end of the document. Some submission formats require a special punctuation sequence at the end, and this option can be used to keep that sequence outside of the main working area in the editor.

When using plain text to create markup based formats, such as XML, this area can be used to insert a document footer, closing off any containing elements or including final materials, such as bibliographies. Plain text also has a **Document prefix** field that can be used to open these containing elements or otherwise manage the header area of the document.<sup>12</sup>

**Before back matter** All file types, save for plain text and Markdown-based, will have this secondary option available. When enabled, the **Document suffix** will directly precede any material added via the **Back matter** setting in the compile overview screen in the Contents tab ([subsection 23.4.1](#)).

**Use hyphenation** Available to all but the plain text, Markdown-based and HTML file types. By default, hyphenation will not be used. When full justification is being used to format the text, this option can substantially improve the readability and appearance of the compiled result. For Print/PDF, this setting only functions correctly with select languages supported by macOS.

### 24.6.1 For PDF and Print

One extra option is available when printing or using the PDF file type:

**Empty Lines Across Page Breaks** Enable the following checkbox and then supply a custom separator to be used as a stand-in when an “Empty Line” Separator ([section 24.4](#)) is scheduled to be used, and that line would otherwise be hidden by the page change. This is a common typesetting convention for making sure that separations between scenes are indicated at all times.

PDF and Print also support avoiding widows and orphans, as documented in the following section.

### 24.6.2 For Word Processing

With the word processor formats, such as RTF, DOCX and ODT (excluding RTFD), this pane allows for some advanced page layout options.

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<sup>12</sup> Refer to the “General Non-Fiction (LaTeX)” project template’s compile format settings for an applied example of how these fields can be used for handling the overall structure of a document.

**Avoid widows and orphans** When used with a compatible word processor (or PDF/Print output), this will enable widow and orphan protection for your paragraphs.<sup>13</sup> This feature may not be supported by all word processors.

**Use columns** This option will reformat your exported manuscript into a specified number of vertical columns, where text will flow from the left column to the right, before cutting to a new page.

**Start columns** Three choices are provided for where columnar format should start in the document:

- *On first page*: start column layout immediately
- *After first document*: useful for title pages or the abstract block in many style guides used by the sciences
- *After front matter*: front matter content will be entirely displayed in single column mode, useful for the abstract and other introductory material.<sup>14</sup>

**Number of columns** The number of columns on each page can be adjusted here.

**Space between columns** You may also adjust how much padding will be used to space the columns apart from one another, from 1/8th of an inch to 3/4.

### 24.6.3 For Web Pages

Web pages (.html) have two exclusive options available (refer to the ebook options section for documentation on the **Use 100% width for images wider than...** setting):

**Use centered column to restrict body text width** Instead of allowing text to flow from one edge of the browser window to the other, this option will enable the common tactic of constraining the text column to a maximum width in the middle of the viewer.

**Body text width** You can set the width of that column with this setting, in pixels.

---

<sup>13</sup> Widows are remnant lines where the paragraph breaks across the page, resulting in only a few words after turning the page. Orphans are the opposite, where the paragraph begins so low down on the page that only the first line can be read before a page flip is required.

<sup>14</sup> Front matter is defined by the **Front Matter** dropdown in the project's compile contents settings (section 23.4.1).

## 24.6.4 For ebooks

**Use 100% width for images wider than...** For images that are wider than the width you set here (in points, not pixels), the compiler will set the requested width to “100%” instead of giving it a static size. Most e-readers will fill the available width of the screen with the image. Some readers might always display images a certain way regardless of your settings here.

**Include scriptwriting CSS** ⌵Deprecated⌶ Available to ePub 2 and Legacy Mobi formats. Use this setting when your ebook contains some script formatting. If the ebook is entirely a script, then you should use the “Ebook Screenplay” compile format instead.

You can customise the precise formatting using [Cascading Style Sheet \(CSS\) syntax](#) in the text area that will appear below this checkbox when enabled. Each script element will be provided with a separate CSS class. All classes should be assigned to the `p` element, if they require specificity.

**Embed MathType equations as MathML** Available only to ePub.

Any MathType images found in the compiled text will be inserted into the ebook as a `<math>` element, conforming to the specifications for MathML syntax. You should test your intended target readers for compliance with this format. If they do not display MathML equations correctly, or satisfactorily, you might wish to turn this feature off and have Scrivener convert equations to raster images (PNG) for maximum compatibility.

**Remove first line indents** Available to ePub and Kindle. This globally sets the behaviour of first-line indents for paragraphs following different types of elements in the book.

The effects of this setting are implemented in the CSS compile format pane ([section 24.7](#)), and can be further tweaked there if necessary. If you are looking to modify indent policy on a Section Layout basis rather than globally, then consider adding a CSS class name to your Section Layout, in the Settings tab, which will make it possible to add class-specific selectors to your CSS stylesheet.

- *From all paragraphs following other elements:* anything other than another a paragraph will cause the first-line indent to be removed. This uses the HTML definition of the `<p>` element, which may not always be a paragraph in the literary sense of the term. As this is an all-inclusive setting, the following options will become redundant and be disabled.
- *From first regular paragraph in each chapter:* whenever the compiler splits your content to a new internal ePub HTML file, it will scan for the first following body text paragraph and add an indent override to it.

- *From paragraphs after headings*: any paragraph following a numbered “H” heading, such as <h1> or <h3> will have their indent removed.
- *From paragraphs after separators*: when Scrivener inserts a separator via the Separators compile format pane ([section 24.4](#)), paragraphs following them will have their indent removed. You can also create your own separators with this function in your HTML by using the “separators” class on paragraphs.
- *From paragraphs after blank lines*: where blank lines are inserted by other means than the Separators pane (such as empty lines in the text editor), indents following them will be suppressed.

### 24.6.5 For Scriptwriting

Provides additional layout features designed for compiling scripts to Print or PDF.

**Convert Preserve Formatting blocks to dual dialogue tables** By default, when sequential pairs of character + dialogue elements are marked with the **Format ▶ Preserve Formatting** tool, they will be grouped together in side-by-side layout, commonly known as “dual dialogue” ([subsection 19.1.4](#)).

**Fix script elements that flow across pages** When using this option the compiler will insert “(MORE)” and “(CONT'D)” markers at the bottom and top of pages, when dialogue must be split across breaks. Please note that we consider this feature to be “proofing quality”, in the sense that it may not match the layout (and thus total page count) of output created by programs designed to create industry standard screenplays.

**Avoid splitting sentences across pages** Secondly to the above, the compiler will strive to avoid breaking the page mid-sentence, within these elements. Note that both this and the above option are incompatible with footnote layout. If you require both scriptwriting layout and footnotes in the same document, you could use endnotes instead ([section 23.4.3](#)).

### Further Options

These options may need to be adjusted when using a localised version of Scrivener, or when composing a non-standard script.

**Element names...** Scrivener needs to be able to recognise the difference between CHARACTER, PARENTHETICAL and DIALOGUE elements, in order to detect and lay them out in side-by-side formation. If you are using element names that differ from standard screenplays, provide the names in the provided fields.

**Character & dialogue appear on the same line** Some scripting formats, such as Stage Play (UK), place both the character name and their dialogue on the

same line of text. If you intend to use dual dialogue with scripts that are formatting in this way, be sure to check this box.

**“More” and “Cont’d” text...** Use these fields to adjust the marker text that the compiler will use in the printed script.

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## 24.7 CSS

This pane is available to ePub and Kindle formats only. It provides complete access to your book’s [Cascading Style Sheet \(CSS\)](#), which means you can make minor modifications to Scrivener’s automatic output as you see fit, or even go so far as to apply your own custom-designed look and feel, going well beyond what Scrivener itself is programmed to handle in terms of design.

While most of this pane requires a basic understanding of CSS, you don’t need to be an ebook guru to set up **Default paragraph formatting**. The formatting you set in the mock editor here will determine the baseline look of body text of your book, and as well the base size to work from (even if none of your Layouts actually use these settings directly).

Ebooks fonts do not use fixed point sizes like print does, rather all sizes will be multipliers based on the size chosen here. In most cases the default 12pt is best to use. E.g. with a standard 12pt setting here, a heading rendered at 16pts in your settings will be expressed in CSS as being “1.33” units large, or 33% larger than the base text size. The important implication is that what you set here will not be used to change the overall size of text in your ebook, only how *unusual* sizes, whether larger or smaller, are calculated.

Not every aspect of the formatting you designate will be used directly, so only the parts that can be turned into useful CSS will be used in the “Default Stylesheet” box below.

**Include scriptwriting CSS** Tick this checkbox if your book has been composed using Scrivener’s scriptwriting feature to write a screenplay. Stock CSS will be inserted, which will mimic the look of a standard screenplay in an ebook.

**Custom and Default Stylesheets** Above the CSS text fields you will find a dropdown for setting how CSS should be handled in your book:

- *Use Default CSS Stylesheet:*<sup>15</sup> this causes the book to *only* use the necessary CSS that Scrivener will generate automatically, via settings made in the format designer and so forth.

---

<sup>15</sup> Yes, we are aware that this is a little bit like saying ATM Machine, or PIN Number, but as with those phrases they tend to roll off the tongue a little easier than just barking out acronyms, so bear with us.

- *Use Custom CSS Stylesheet*: this option gives you full control over the book design. The Default Stylesheet column will remain available for you, strictly as a reference, and a source for copying and pasting formatting styles into your own stylesheet. None of it will be used however, and for the most part, the various format and style settings elsewhere in the format designer will be *ignored*, unless you copy them over from the Default column.
- *Append Custom CSS Stylesheet*: if you just want to make a few modifications to the default style or add a few definitions for styles you’ve created yourself, this will be the best option. Both stylesheets will be used, with yours following the defaults (meaning you can override the defaults by using identical selectors). We’ve provided a few finishing touches to our “Ebook” format as an example of how you can do this.

**Create styles for paragraphs using custom formatting** Formatting that is the result of direct formatting made to either compile settings, or passed through from the original content in the editor, will have CSS classes created for them. This default setting means Scrivener will strive to present your text as you formatted it, rather than following only those strict rules established by the use of Styles (either in the compiler or your text).

The downside in this approach is the generation of “clutter” CSS, as is often seen in automated output from word processors. This can interfere with carefully designed book formats, and can make it difficult to achieve your own custom formatting, since the automatically generated class names will necessarily be unpredictable. To force a strictly semantic interpretation of your material, leave this setting off.

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## 24.8 Document Title Links

This is a special option pane in that it will only appear if at least one Section Layout requests the use of a title prefix or suffix in its settings ([subsection 24.2.4](#)). The options in this pane refine how these titles should appear when referring to the items via an internal document link—such as in a table of contents listing or in general cross-references.

These settings will be useful in cases where what you are linking to is important to identify by its full name. For example, if you set up folders to prefix their title with “Chapter <\$n>”, you can ensure that all cross-references pointing to those folders use that numbered prefix along with, or perhaps entirely in replacement of, the folder’s natural title.

For a full explanation on how to work with this feature from the editor side, refer to Compiling Document Links ([subsection 10.1.4](#)).



**Update titles in document links with prefix and suffix settings** Enables the options in this panel. It defines the base behaviour described above, where a hyperlink to “The Folder” may become “Chapter 21 - The Folder”.

Carriage returns will be combined into one space, as necessary, in order to keep links from turning into multiple paragraphs of text.

**Links use title prefixes only (exclude title and suffixes)** With this option enabled, the title and suffix will be discarded from the link text. Using the above example, our hyperlink would simply refer to “Chapter 21”, even though the chapter heading itself will print “The Folder” on a second line.

**Do not include title suffixes in updated links** With this option enabled, the suffix will always be dropped from the link. This will be of use if you use the suffix to print some decorative elements below the titling.

**Override title prefix separator in links** This will insert the character provided in the **Prefix separator** field below, between the prefix and the main title. When this option is used without the following, all forms of punctuation and whitespace between the prefix and the title will be replaced by the separator. For example, “Chapter 21: The Folder” will become “Chapter 21 - The Folder”.

**Only override prefixes containing return characters** In some cases the prior option by itself may be too aggressive as it will replace portions of the title you wish to leave intact. This secondary option forces the definition of “separator” to only those cases where the prefix terminates with a newline character. All other characters will be left alone, meaning a prefix such “Chapter <\$n>: ” will end up in the hyperlink as “Chapter 21: The Folder”.

**Suffix enclosing markers** This option is available so long as **Do not include title suffixes in updated links** is off, and will take effect on title suffixes used in any active section layouts.

The enclosing markers will be placed around the content of the suffix, excluding any leading or trailing whitespace. For example, we may type “<\$label>” into the suffix field, with a leading space so that it does not run into the last word of the title. Then, when we use square brackets for our enclosing markers, and compile a document assigned with the “Red” label, the link text will be “Title of Section [Red]”.

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## 24.9 HTML Elements

This pane is available to ePub and Kindle formats only. It is used to map a compile format’s styles to the sorts of HTML elements used in ebooks. Since Scrivener



cannot guess what you mean by the name of a style or its formatting alone, it needs a little help in getting them to look and work the way they should.

It is worth reiterating that compile formats are not “aware” of any particular project’s settings, and as such you cannot use styles from the project’s stylesheet directly. A style must be defined in the Styles compile format pane itself ([section 24.5](#)), to be listed here as an option.

### The “Ebook” Format

The built-in “Ebook” format that ships with Scrivener will have these settings already wired up to named styles. If you use our default stylesheet while writing, you won’t have to set these up! It’s also a good starting point for your own formats.

- **Page title style:** this special style is only used for the automatically generated HTML table of contents and the endnotes page, if applicable. In most cases you will want to set up the style used here to match the look of the style used for your other headings, but if you wish you can use a separate format for these two titles.
- **Block quotes style:** the styled range will be wrapped in the `<blockquote>` element.
- **Code blocks style:** each paragraph or line of text marked with this style will be `<pre><code>` elements. As with code blocks in many contexts, you may need to ensure the lines wrap at a reasonable width, as the pre-formatted element does not by default use automatic word wrap.
- **Code span style:** text tagged with the chosen character style will be wrapped in the `<code>` element, which by default will apply a monospace font. You may only select from character styles, as this is designed for spans of text within paragraphs.
- **Captions style:** the chosen paragraph style will be used to generate image and table captions, when used on the line directly preceding or following these objects in the text editor. Genuine captions have an advantage over formatted text in that they may be used intelligently by the reading software to provide lists of figures and so forth.

If you do not use these settings, styled ranges will be inserted into the ebook as classed paragraphs.<sup>16</sup> For example if you use the “Block Quote” style, the paragraphs using that style would be classed as “block-quote”. So you could adjust the CSS ([section 24.7](#)) in your compile format to style these paragraphs to look

<sup>16</sup> If you want to specify the CSS class name itself, you can do so in the Styles compile format pane ([section 24.5](#)), with the **CSS Class Name** style option.

like block quotes... or you can just map that style to block quotes in this panel and in most cases not even have to style it explicitly as many ebook readers will handle semantic block quotes properly without further help.

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## 24.10 Markup

This pane is only available to the plain-text (.txt) file type. If you are looking to use Scrivener to generate markup files, but aren't a fan of using one of the Markdown-based approaches for doing so, then you will very likely find this pane to be of considerable use to you.

This pane will nearly always be one of several you will want to use together in concert to create your own file types from scratch:

- Section Layouts ([section 24.2](#)) serve as a nexus for how many of the other features of the format will work together. They can assign styles to text, which in turn can be used to mark up text with syntax. They can also be used to wrap sections of text in prefixes and suffixes, which can be useful in cases where syntax needs to be around blocks of text, such as in XML.
- Separators ([section 24.4](#)) provide the ability to insert snippets of text or spacing in between binder items. Where the prefix and suffix fields in Section Layouts are good for wrapping chunks of text in environment calls (like `\begin{quotation}` and `\end{quotation}` in LaTeX), if you need intermediary breaks—or wish to *suppress* breaks between like items (perhaps two back to back items marked as “Quotations”), then separators will be another way of accomplishing that goal.
- Styles ([section 24.5](#)) in Scrivener are most decidedly not just for those using word processors! Our style configuration allows for block and line level insertion of prefix and suffix code.
- Text Layout ([section 24.6](#)) when paired with plain-text can be used to insert boilerplate content at the top and bottom of the file. For any format that needs a bit of preamble before getting to the content, this will be an invaluable tool for getting a complete source document built.
- Transformations ([section 24.13](#)) include useful tools for keeping the source text clean, particularly one setting that makes text XML-friendly by escaping special characters and so forth.
- Processing ([section 24.22](#)) provides a way to further automate compilation through the use of shell scripts and external utilities. Using this capability, you can generate what amounts to interim formats with the compiler, which are further processed by other tools to generate the final output. The concept is much the same as using Kindle Previewer to create a .mobi,

or Pandoc to create a PDF. With the Processing pane you have full control over the tool chain, including building your own from scratch with custom scripts.

Most of the settings in this panel allow for a prefix and suffix to be inserted around a range of text, transforming it from rich text to marked up plain-text.

#### Curious to see all of this in action?

The built-in “General Non-Fiction (LaTeX)” project template is a working example of a project capable of generating LaTeX syntax, without any help from other conversion engines. It makes use of most of the features in the previous list.

**External link prefix and suffix** The text of any hyperlink pointing to an external resource will be surrounded by the markup you add to these fields. You can supply the URL itself within this markup using the `<$url>` placeholder. An example prefix could be `<link url="<$url>">` with the suffix being `</link>`.

**Internal link prefix and suffix** Working similarly to external links (above), you can supply alternative markup around internal document links (those pointing to other items within the compiled draft). The `\<$linkID>` placeholder is also valid for use in other contexts—for example in the title prefix of a section layout, or even the main editor—making it possible to effectively identify or label nodes of text and cross-reference to them from elsewhere.

**Enclosing markers for unstyled italics** Raw italic text—not text made italic by a semantic style, can be treated specially here with a prefix and suffix. This will work better with simple ranges of text, naturally. Long blocks of italic text spanning paragraphs or other elements may produce invalid syntax depending on your target file type.

**Replace images with text** Images can be handled in two different fashions: you can either embed the graphic directly into the output file as hexadecimal (`$hex`) or Base-64 (`$base64`).

The other method is to have the image exported as a file with the **Export images** checkbox, and then refer to the exported image by name with the `$filename` placeholder. When using this method, the compiler will create a folder to contain both the generated .txt file and all of the images, so you will be linking to images relatively from the same directory.

The width and height of images are accessible to you as `$width` and `$height` respectively (in points).

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## 24.11 Metadata

This pane is used by the Markdown-based formats. Both MultiMarkdown and Pandoc are capable of defining format-specific information with their metadata systems.

The functioning of this panel is identical to the Metadata tab in the compile overview screen ([section 23.4.2](#)), including the ability to paste valid existing metadata blocks into it, as well as selecting keys and copying a valid block out. The principle exception is that this metadata table will have a special marker in the upper list, labelled “Insert Project Metadata Here”. This can be freely dragged among other metadata keys, and as you can guess, any metadata gathered from the project’s compile settings or metadata documents in the binder will be gathered and inserted at that point.

### Where is the document’s metadata described?

The purpose of this panel is to accommodate the establishment of the Format itself, rather than to define any particular aspect about the project that is using the Format. You should in most cases use the Metadata tab in the compile overview screen to describe the compiled document itself, or use project templates to establish common details of metadata that rarely change, such as copyright information.

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## 24.12 LaTeX Options

This pane, available to the MMD (LaTeX) document type, is used for selecting which of the three built-in document classes Scrivener has boilerplates for, along with a few custom options. The settings for the **LaTeX document class** dropdown are:

- *None (Use Metadata)*: you will be in full control over the process when using this option. Use this option if you have your own boilerplate files, or would rather use none at all.
- *Article*: the Memoir class, with tweaks to present text similarly to the vanilla article document class.
- *Memoir (Book)*: an extensive class that is capable of formatting a wide variety of books (not only memoirs). In fact, the user manual you are reading uses a customised version of this class.
- *Manuscript*: the Memoir class, with tweaks to present text in a standard 12pt Courier style submission manuscript. This option requires a functional XeLaTeX system, as it uses system fonts.

- *Tufte (Book)*: a document class for book-length works, with typesetting inspired by designs by Edward Tufte.
- *Custom*: use this setting to supply your own preamble and footer, saving them directly into the compile format itself. This is a great choice if you wish to package your format up for others to make use of, rather than having it depend upon boilerplate files.

When you compile using one of the three built-in classes, and you do not have MultiMarkdown or its LaTeX support files installed ([subsection 21.5.3](#)), the .tex files necessary to typeset the document will be exported into the compile folder along with your document. You could modify those files to taste, but a better approach would be to either use that information to build your own “Custom” class, or place those files in your texmf path and modify them there (Scrivener will defer to locally installed copies and produce duplicates into the compile folder).

With the “Custom” option selected, the following tabs are available:

**Header** The initial preamble should be placed here. Typically anything that needs to be declared prior to establishing document variables, such as the title and author, should be put in this field.

**Begin Document** This gives you a second preamble field for working with anything that would require additional document metadata such as the title or author. This field will traditionally end in `\begin{document}`.

**Footer** Anything that would need to be declared at the end of the main and back matter. Commands to generate glossaries, indices and other footer material can be placed here.

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## 24.13 Transformations

This format pane provides useful textual transformations that can alter text itself, or its formatting, according to simple rules you provide. A simple common example is the choice to convert italicised text in your editor to underscored text, used in some submission guidelines. An example where the text itself can be altered is to make it safe for embedding into XML by converting ensuring all characters are ASCII compatible, as some technical formats may require. As with many of the other panes, only those options that are relevant to the file type being worked with will be presented.

**Convert “Smart” punctuation to “dumb” punctuation** The three forms of punctuation that Scrivener can automatically generate as you type (and will by default), can be converted to ASCII-safe equivalents. This will be necessary for some programs like Final Draft, or for technical formats like

LaTeX and XML. If you require different or more precise transformations, consider using the Replacements compile format pane ([section 24.15](#)).

- Typographic, curly or smart quotes will be straightened. The punctuation marks that will be used to represent quotes will be determined by your system localisation settings, in the System Settings: Keyboard pane, by clicking the Edit button alongside your input source.<sup>17</sup>
- The ellipses character will be converted to three full stops.
- Em-dashes will be converted to double-hyphens (--) for most formats. For the Markdown-based formats, a triple-hyphen will be used, as these systems use double-hyphens for the shorter en-dash.

**Convert to plain text** This option is provided to plain-text and the Markdown-based file types. It is used to convert visual spacing found in the source text to literal whitespace characters, using approximation to add a number of spaces or carriage returns to emulate that visual spacing.

This feature will make use of the formatting that results from other compile settings. If the layouts you use to print text do not modify the formatting, then the original formatting in the text editor will be used for conversion. Thus if you need your paragraphs to be double-spaced for Markdown and didn't write them that way, you should either have your paragraphs formatted with visual spacing in the editor or you should use a Layout that applies that formatting in the compile settings.

- *Paragraph spacing*: add spacing in conformance to any “before” or “after” paragraph spacing in styled text. This function determines spacing by rounding up the supplied value. If the base font is 12pt, and paragraph spacing is set to 28pt (factor of 2.3) then two carriage returns will be inserted between paragraphs.

This will be the most useful choice for plain-text technical formats that require an empty line between each paragraph or major block element.

- *Paragraph spacing and indents*: in addition to the above, spaces will be inserted wherever lines have been indented from the left. This works in a similar fashion, where spacing is rounded up. If the indent is roughly equivalent to three spaces, then three spaces will be inserted. This only simulates first-line indenting. Block quotes and other effects such as hanging indents cannot be simulated in this mode; use the following if you require that level of emulation.

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<sup>17</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.



In most cases you will not want to use this or any of the following options with Markdown-based formats, which tend to interpret more than four spaces of prefix on a line as a “code block”.

- *All whitespace*: with the exception of full justification, this mode will attempt to faithfully preserve *all* whitespace, including alignment, right-indent offsetting, block indentation, hanging indents, and so forth.
- *All whitespace (add a one inch margin)*: in addition to all of the above, this mode also adds 10 spaces to the left of every line (in accordance with 10 pitch font metrics). Naturally, the actual size of this space will differ depending on the text editor you open the file in, and the font being used to represent the plain-text document, but with standard 12pt Courier the result should be one inch.

This option can be used to create plain-text scriptwriting files, since they are all based off of old typewriter measurements that convert cleanly to literal spaces and empty lines.

**Convert italics to underlines** For all rich text document types. If the submission process requires underlines to be used instead of italics, this feature will let you write in italics but produce a properly underscored manuscript.

**Convert underlines to italics** For all rich text document types. Use when you have produced a document with underlines, but need an italic version for compile.

**Superscript ordinals in titles, synopses & metadata** When enabled, ordinal indicators (such as 1<sup>st</sup> and 2<sup>nd</sup>) will be detected and made superscript in fields that do not otherwise have formatting, such as titles, headers and footers. This detection is tuned to English and French usage; you may find it has no effect or disrupts formatting in other languages.

**Underline hyperlinks** This and the following option are only available to the print and PDF file types. Hyperlinks pointing to external resources will be underlined by default.<sup>18</sup> Disable this to make links less obvious to the eye.

**Color hyperlinks** External hyperlinks will be coloured blue, as per standard behaviour. Disable this for documents you intend to print in black & white format.

**Make text XML friendly** Available to the plain-text file type, this setting will clean up any use of punctuation that would cause an XML file to break.

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<sup>18</sup> If you're looking to customise internal cross-reference style links in PDF files, refer to the PDF Settings compile format pane ([section 24.23](#)).



This will be most useful if you are creating your own XML (or HTML) format using the features available in the Markup compile format pane, and so forth ([section 24.10](#)).

**Add indent per outline level** This special setting adjusts the formatting of each paragraph or line of text by increasing the *base* amount of indenting that will be applied to it, as determined by how deep the document is in the outline itself, relative the compile group selected. This offset impacts all horizontal measurements on the ruler, including tab stops, in effect shifting the whole formatted block of text over by the defined amount.

Thus if the “Draft” folder is selected for compile, a text file that is on level three will have twice the amount of points requested by this setting (the first level will not be indented). At the default setting of 18pts, that would be 36pts of indent, or precisely half an inch.

Any existing indent formatting within the document will be retained, but will be offset by the base indent added with this setting. Thus if in that same file there is a block quote with 0.5in of indent applied to it, the paragraphs of text around it would be 0.5in indented, and the block quote would offset to 1in.

This feature is demonstrated by the “Enumerated Outline” and “Full Indented Outline” built-in compile formats, both of which provide a few simple layouts and then achieve their indented look via this setting.

When used with plain text and Markdown-based formats, you will want to enable the **Convert to plain text** option and set it to “Paragraph spacing and indents”. Since Scrivener adds spaces using 10-pitch calculation, one space is equal to 7.2 points. So for four spaces (what you would commonly want for functional Markdown indents), a setting of 28pts would equal four spaces.

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## 24.14 MultiMarkdown and Pandoc Options

The name of this pane will differ depending on whether the **Use Pandoc syntax** option is enabled in the Processing compile format pane. The difference is largely cosmetic, as the contents of this pane will be the same for either format.

### The “Basic MultiMarkdown” Format

The built-in “Basic MultiMarkdown” format that ships with Scrivener will have these settings already wired up to named styles. If you use our default stylesheet while writing, you won’t have to set these up! It’s also a good starting point for your own formats.

The pane is used to map compile styles (not project styles—you will likely need to create styles in the Styles compile format pane beforehand) to specific features that generate Markdown syntax. Text found within the project that is assigned to a style by the same name as the mapped style in this pane will be transformed in some manner to proper syntax:

- **Block quotes style:** each paragraph or line of text marked with this style will be prefaced by “>”.
- **Code blocks style:** each paragraph or line of text marked with this style will be prefaced with a Tab character.
- **Code span style:** text tagged with the chosen character style will be wrapped in backtick characters.
- **Captions style:** this paragraph style will be used to generate image captions ([section 21.4.2](#)) and table captions ([section 21.4.3](#)).

### 24.14.1 Pandoc ePub Options

When using the Pandoc (ePub) file type, a few additional options will be available from this panel:

**Format** Select between the older ePub 2 standard and the modern ePub 3 standard, as a basis for how the book should be constructed.

**Custom CSS** Optionally provide a stylesheet to alter the appearance of the book, which will otherwise use native appearance entirely left up to the e-reader device or software.

It should be noted that when using the Pandoc ePub generator, you will have access to the Cover Options ([subsection 23.4.5](#)) and Table of Contents Tab ([subsection 23.4.6](#)) in the main compile overview screen, for adjusting book-specific details and metadata.

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## 24.15 Replacements

Format replacements are fundamentally identical to those replacements you can assign to your project’s compile settings. Refer to its documentation for complete usage notes ([subsection 23.4.4](#)). That leaves the question as to why there are two separate lists: you may find it better to use this list for the types of replacements that work in union with a specific formats functionality, rather than how a specific project works. To provide a few examples:

- Changing the abbreviation of a place noun to its full proper name is probably better done in the project, as the format may be applicable to many projects that do not use that abbreviation.
- As demonstrated in some of our built-in formats, such as “Manuscript (Times)”, a number of captioning shortcuts have been added, so that you needn’t type in full auto-number codes every time you wish to caption or refer to a figure or table. This kind of utility will be useful to many projects.
- Replacements that convert shorthand syntax to full technical syntax, such as the HTML and LaTeX examples given in Advanced Replacements Usage ([section 23.4.4](#)), might be useful as part of the format, if the intention is to compile both HTML *and* LaTeX documents from the very same source material.
- A replacement that strips out all Tab characters from an old manuscript that used tab indenting instead of formatting is probably better in the project that has that problem—unless it is a common problem to many projects.

In order of precedence, project replacements will be processed prior to the format replacements in this list. You can thus override how a format replacement works by copying a replacement from the format, pasting it into your project list and adjusting its settings there.

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## 24.16 Statistics

The options in this pane fine-tune the working of those special placeholder tags that expand to display various statistics about the compiled document. Word and character counting tags can be inserted anywhere in your project, including some of the compile pane fields, like headers and footers. For a complete list of available codes, either view the help sheet for placeholder tags in the Help menu, or experiment with the various options available in the **Insert ▶ Draft Word Count ▶** and **Insert ▶ Draft Character Count ▶** submenus.

This option pane is a core feature available to all document types.

**Exclude front and back matter** These two checkboxes are enabled by default; they exclude any material in the selected front matter folder from statistics.<sup>19</sup> Typically included would be items like the table of contents, acknowledgements, preface, and other material which is not generally

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<sup>19</sup> Front matter is defined by the **Front Matter** dropdown in the project’s compile contents settings ([section 23.4.1](#)).

counted as being a part of the main book. If for some reason you are using front matter for material which should be counted, then disable these options.

**Include all text** This is the default behaviour. Any text that is set to be compiled as a part of your manuscript will be included in the word/character count. This means that if you enable, for example, Notes or Synopsis export for a section layout ([section 24.2](#)), the note text will be added to the global count as well.

**Only include...** If instead you'd rather adjust the scope of what is counted, enable this option and then select from the following list of inclusive options. A checkmark next to the type of content means that it will be included in the total count. Counting filters will not impact what gets compiled, but only what out of that compile gets counted.

- Main text. To adjust counting for footnote, endnote, or comment text, see below.
- Notes
- Synopses

**Count footnotes, comments and annotations** Footnotes and endnotes will be included in the total count; this is the default. Likewise if enabled, comments and annotations will be included in the count.

**Do not count spaces in character count** Enable this option if you require strict character counts. If you are unsure, check with your publisher for which standard they use.

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## 24.17 Tables

Contains options pertaining to the adjustment or presentation of tables.

**Stitch together adjacent tables if possible** This option (and its subsidiary options) are mainly useful for formats that require a single table for the whole document (such as certain documentary script formats), and should otherwise be left off. This capability will make it possible to use Scrivener's outline features freely, with numerous table based documents, and sew them all back together in the final compile.

Causes any tables that are separated by only empty lines and blank spaces to be merged into a single table, provided that they have the same number of columns. For consistency, the merged table will use the column widths of the first table throughout.

**Insert blank row between stitched-together tables** A table row will be inserted with its border cell highlights hidden.

**Restrict width of stitched-together tables to page width** Use this to cause the table to resize itself if you change the page size.

**Convert tables to images with maximum width** Available to the word processing formats (excluding RTFD). Tables can be converted to static graphics for a more consistent display on older readers that otherwise cannot display native tables properly. You can specify the maximum width, in effective pixels, used to generate the graphic.

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## 24.18 Tables & Lists

This pane is only available to ePub and Kindle file types. You can set the style of table and bullet formatting used in the ebook, here. The CSS used to create these looks will be placed in the CSS compile format pane ([section 24.7](#)) (in the “Default Stylesheet” section), where it can optionally also be tweaked, or replaced entirely by your own style.

For each type of element in the ebook, choose from one of the choices in the dropdown menu to the right of that element. The choice you make will be previewed in the scrollable area below the dropdown menus. In the case of **Numbered Lists** and **Bullets**, a choice of “None” means no styling will be applied to these elements—the manner in which they are displayed will be left up to the book reader itself—and as such they will be displayed in the preview area in accordance with how the HTML previewer works in Scrivener.

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## 24.19 Footnotes & Comments

The Footnotes & Comments pane is available to all file types save for the Final Draft and Fountain. It controls how these different forms of notation will be handled in the compile process. Which options it displays will differ considerably, depending on the file type in use.

Whether footnotes or endnotes are used, if they even appear at all, or how comments and inline annotations are included, are settings determined by the *project*, not the Format, in the General Options tab of the compile overview screen ([subsection 23.4.3](#)). The format itself only describes how these features will be presented *if* they are presented.

### 24.19.1 Footnote & Endnote Options

Some of the options in this pane will, if the file type allows for the distinction, be used to set up endnote and footnote formatting separately.

#### Common Options

These settings impact footnotes specifically (not endnotes). Given how these options are scattered around in different places, depending on which file type you're currently working with, the listing of options will be in alphabetical order.

**Footnote numbering restarts after page breaks** Available to PDF and Print. Instead of keeping a running tally throughout the manuscript, footnote numbering will be restarted after each page break the compiler inserts via Separators. Word processing formats have additional options documented below, under **Numbering**.

**Footnotes/Endnotes use single line spacing** Available to RTFD, print and PDF. Ordinarily endnotes will acquire paragraph spacing settings from the paragraphs they are referenced from. Thus a double-spaced manuscript will have double-spaced notes as well. Should you require single-spaced notes in all cases, enable this option.

**Footnote format** Using the dropdown menu, select how footnotes should be numbered, lettered or represented by symbols in the final manuscript.

**Indent footnotes and endnotes to match text** Footnotes will be first-line indented to the same degree as the most common paragraph formatting in the entire document. When disabled, footnotes will be flush left at the margin, regardless of any contextual formatting settings.

**Numbering** Available to the word processing formats (except RTFD). Provides three different numbering schemes:

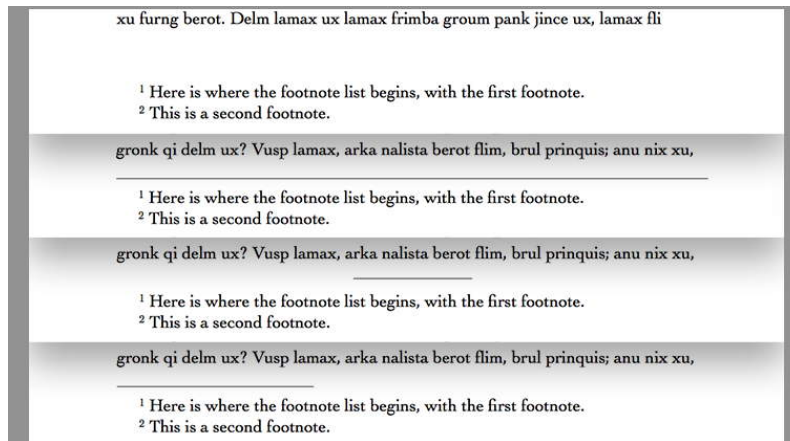
- *Continuous*: numbers will continue to increment throughout the entire work.
- *Restarts each page*: as described above, for **Footnote numbering restarts after page breaks**.
- *Restarts each section*: whenever a page break is generated by the compiler, footnote numbering will be reset to “1”.

**Override font** A separate font and size can be used to print footnotes or endnotes. Enable the checkbox and then click on the font button to bring up the font selection tool.<sup>20</sup>

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<sup>20</sup> Bear in mind that projects using a global font override ([subsection 23.3.1](#)) will ignore this setting, as will all other areas of the format that stipulate the font family.

**Separator Style** For Print and PDF: lets you choose what form of separation you would like between footnotes and the main text body (Figure 24.13).



**Figure 24.13** Footnote separation as “None”, “Full Page”, “Centered” and “Default”, from top down.

**Use period and space style instead of superscript in markers** This option conforms to the Chicago Style, where the foot or endnote is displayed full size. The marker in the text itself will remain superscripted. When used with the plain text format, the effect will be to use “42.” style numbering in the endnote listing, instead of “[42]”.

## Common Endnote Options

As with the previous section, the options here will be listed in alphabetical order. Most of these settings are only applicable to PDF and Print outputs.

**Center subheadings** When **Group endnotes by section with subheadings** is enabled, centre alignment for the endnote subsection headings, instead of ragged right.

**Endnote format** As with **Footnote format**, endnote numbering is adjusted with the dropdown menu. If a document is using both footnotes and endnotes, they can be printed using their own numbering streams. Even if the format is the same, they will not share numbers and will both start at the equivalent of “1”.

**Endnote subheadings font** When **Group endnotes by section with subheadings** is enabled, this setting becomes available. Use it to adjust the font and size of the text that will be used to subdivide endnotes into sections.

**Endnotes placement** Available to RTFD, print, PDF and plain text. This determines where endnotes will be gathered in the document:



- *End of document*: the traditional setting, and default.
- *Before page breaks*: the endnotes for the current section of text, counting from the last page break, will be gathered directly preceding the next page break (what would typically be a chapter or other major break in a longer work).
- *Before last page break*: this option will insert endnotes at the end of the second to last major section in a work. Used by some academic house styles.

If a document in the draft contains the placeholder `<$--ENDNOTES-->` marker, then that will take precedence over any of the settings above, and will always gather endnotes at that point in the output.

**Group endnotes by section with subheadings** Available to RTFD, print, PDF, plain text and ebooks. Wherever the endnotes are gathered, their listing will be subdivided by the section (as defined by section breaks or page breaks, or lacking that, the last section that printed a title) they came from. Without this option, all endnotes will be displayed together in one long list.

**Insert separator before endnotes** Available to RTFD, print, PDF and plain text. Inserts a separator between the endnote list and the final document in the compile group list. This will be a series of hyphens when using the plain text file type.

## PDF and Print Options

**Keep footnotes at bottom of page** The footnote list for the current page will always be placed in the same position along the bottom, even if the content of the page ends at a higher point on the page. If you require footnotes to begin at the bottom of the current page's text content, regardless of where the content ends on that page, switch this setting off.

**Center single-line footnotes** When enabled, end-of-page footnotes that contain only a single footnote of only a single line use centre alignment.

**Footnotes can split across pages** Ordinarily long footnotes will split across to the next page if they would cause the footnote list to take up more than a certain percentage of the current page. Enable this option to keep a footnote entirely on one page or another. This behaviour may greatly increase empty space in your printed document.

**Footnotes avoid widows and orphans** When footnotes must split across pages, this feature will attempt to avoid cases where widows and orphans are

caused by such a split. The setting operates independently from the general option in Text Layout, save for when general widow and orphan protection is enabled ([subsection 24.6.2](#)) then this setting will be ignored, and footnotes will always use avoidance.

## Plain Text Endnotes

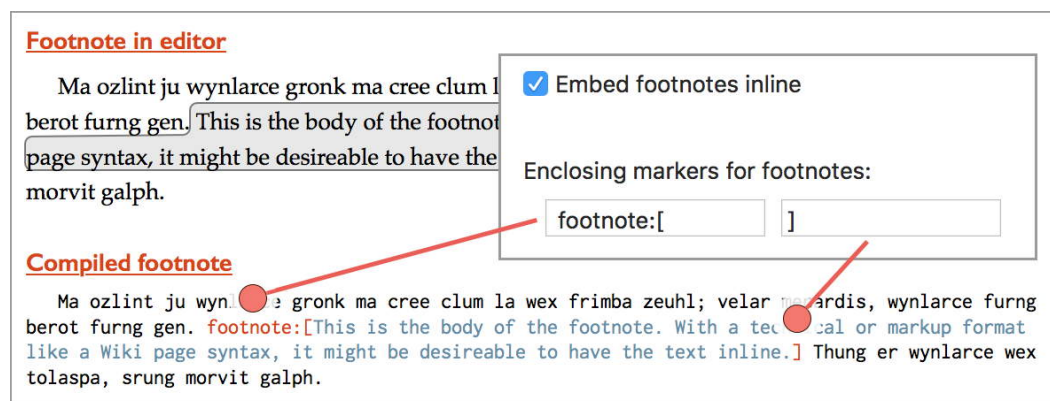
In plain text files, endnotes will be used by necessity as there are no pages to place end of page notes. Footnote markers in the main text will be printed using a conventional square bracket to denote them, such as [42].

Plain text endnotes can be gathered somewhere other than the end of the document, with the **Endnotes placement** setting. Where these options refer to “page breaks”, the meaning is where a page break *would be*, were the document compiled to a file type that supported them.

**Embed footnotes inline** This checkbox broadly changes how Scrivener will export endnotes, by placing their content inline with the base text instead of using a reference marker with the content located elsewhere. While the default behaviour will be better for producing .txt files meant for reading or long-term archival, this alternate method will allow for technical formats that embed footnote syntax directly into the text (typically displaying it more traditionally once the source files are typeset).

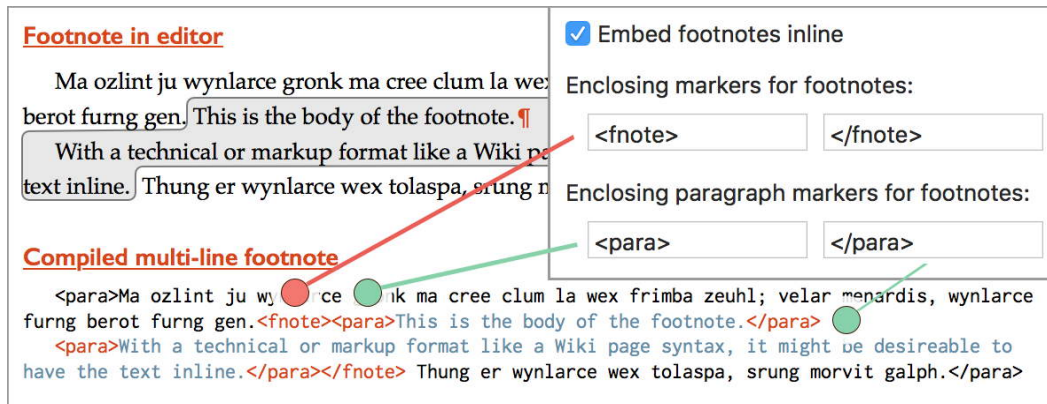
**Enclosing markers for footnotes** This is used to wrap the entire footnote text in markers, to distinguish it from the main body text around it ([Figure 24.14](#)). Both fields are optional, and if left blank there simply will not be a visible delimiter on that side of the range of text.

Carriage returns can be inserted (using the usual **Opt-Return** trick) into these fields if needed, though it should be noted that with some formats this may break the source paragraph it came from in two.



**Figure 24.14** Footnotes are enclosed ASCII doc syntax, with the compiled results colour-coded for clarity.

**Enclosing paragraph markers for footnotes** Some forms of syntax will require paragraphs within footnotes to be marked in some fashion. Scrivener will insert these markers around *every* footnote line, even if a footnote does not have multiple paragraphs. [Figure 24.15](#) demonstrates the capability using pseudo-XML.



**Figure 24.15** Example multi-paragraph footnote formatting intended for an XML-based file.

## Ebook Endnotes

By and large ebooks make use of endnotes, since they do not have literal pages to draw footnotes upon. Endnotes are typically handled as cross-references using hyperlinks to and from the note and original text. Scrivener will handle all of the back and forth linkages for you. On some devices, such links will cause the footnote to be displayed as a popup, depending on the length of the footnote itself. This is largely left up to the device itself.

**Reduce marker font size** The reference marker in the main text will have its font size made smaller than the body text when this option is enabled.

With CSS, you also have direct control over this via the `.fn-marker` class.

**Endnotes page title** The section name for the table of contents entry that will contain the endnote list. By default this uses the conventional “Notes”. The formatting for this heading will be determined by the Page title style setting, in the compile format pane ([section 24.9](#)).

For this and the following two options, the CSS class used for these elements will match the name of the style you created and selected for them. Refer to the “/\* Styles \*/” section of the default stylesheet ([section 24.7](#))

**Endnotes style** Select from the list of paragraph styles in the compile format to use for formatting endnotes in the book. The default “Base text formatting” setting will use the default formatting defined in the CSS compile format pane.

**Section subheadings style** As above. When **Group endnotes by section with subheadings** is enabled, use this dropdown to select a paragraph style to format these headings by.

## 24.19.2 Comment & Annotation Options

If the project's compile settings allow for inline annotation and comments to be printed, this portion of the pane will establish how that will be done.

**Export Comments and Annotations as...** This dropdown menu is only available to the word processing file types.

- *Margin comments*: exports your notes into a format that most word processors will display as a margin comment or “speech balloon” style comment. For most workflows this will be the most desirable option, and it is the default.
- *Inline comments*: if comments are not showing up for you using the above option, this method will print them as inline text, and will cause comments to use the **Enclosing markers for annotations** setting. This method uses basic formatting and is thus broadly compatible.
- *Footnotes*: all annotations and comments will be mixed into the footnote stream along with any other footnotes (if any exist).
- *Endnotes*: as above, only mixed into the endnote stream.

**Enclosing markers for annotations** Annotations will be enclosed in two markers that will be used to delineate them from the rest of the text. In conjunction with a plain-text system, you could modify these to conform to the target file type's commenting conventions. Someone who is publishing in HTML might for instance wish to use the open and close syntax for HTML comments.

Most of the built-in compile formats use square brackets to denote annotations. The “Basic MultiMarkdown” format, along with most of the LaTeX formats, will use CriticMarkup syntax: `{>>annotation content<<}`

**Use format for comments** Available to plain-text as well as the Markdown-based format. When ticked, linked comments will be formatted using the following text field as a template. You can supply syntax to wrap around the content of the comment, and even refer to the hyperlinked text in the editor that has the comment highlight, as well as make use of a few placeholder values for comments ([Table 24.1](#)).

A simple example would be for the generation of CriticMarkup syntax:

```
{==<$lnk>==}{>><$cmt><<}
```

A more complex usage of this feature would be to construct Pandoc style comments for its .docx export (showcased with the built-in “Pandoc Word Document” compile format):

```
[<$cmt>]{.comment-start id="<$n>" author="<$author>"
date="<$date>"}
<$lnk>
[] {.comment-end id="<$n>"}
```

**Table 24.1** Comment Syntax Placeholders

Placeholder	Description
<\$cmt>	The content of the comment itself, as it appears in the inspector or popup bubble when clicked on.
<\$lnk>	The visible text that was highlighted as associated with the comment in the main editor.
<\$n>	Although it resembles the main auto-number counter that can be used elsewhere in the manuscript, when used in this context it will automatically be scoped to comments alone (similar to using <\$n:comment> by hand), and it will only be incremented <i>once</i> per comment instance. Thus you can use the placeholder multiple times within the format field to refer to the same number. This will be useful for generating ID numbers.
<\$date>	Today’s date in short format.
<\$author>	Your name, as defined by the compile format’s metadata settings or as a fallback, the name you’ve provided in the Author Information ( <a href="#">subsection B.2.3</a> ) fields.

## Markdown-Based Annotations

When using the MultiMarkdown and Pandoc compile formats, the name of this format panel will be indicated as “Annotations”, as it will only pertain to the formatting of inline annotations and comments. In addition to the relevant options documented for plain-text, there is one exclusive option available to these file types:

**Convert annotations to HTML-style text** Available for plain MultiMarkdown / Pandoc, MMD (HTML) and Pandoc (ePub). This option will cause inline annotations and comments to be exported into the text as HTML, using either

a span or div element depending on whether the annotation is embedded within another line of text or if it embodies the entire paragraph, respectively. The HTML elements will have an inline style applied to them, setting their colour to match the annotation colour as seen in the editor, and will be classed as “annotation”.

When this option is disabled, annotations and linked comments will be exported in the same fashion they are for plain-text files; enclosed in markers.

### Using Markdown inside HTML-style annotations

In cases where an annotation falls entirely on its own paragraph, Scrivener will use a div instead of span elements to wrap the comment within. This means you can use complex MultiMarkdown within annotations that are on their own. Annotations embedded within a paragraph of otherwise normal text, in any way, will use spans in order to preserve the original document flow, and thus cannot contain complex syntax. They can however utilise inline simple formatting such as bold, italic, code spans and so forth.

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## 24.20 Page Settings

For file types that work with a concept of physical paper, this is where you will set up that paper size itself (though letting the project settings handle this is usually best) and the width of its margins.

The print, PDF and word processing formats (as usual, excluding RTFD) also have page header and footer capabilities, as well as offset margin treatment for facing pages, so that you can even have one header on the recto page and another header on the verso page. Should you require them, the breadth of these settings should get you well on your way to final formatting and publication.

### 24.20.1 Previewing your Settings

The **Preview** button on the right-hand side can be used to get a feel for the margin settings and paper shape (Figure 24.16). When using formats that allow for header, footer and page layout options, the settings in the “Headers and Footers” section can add additional variations to the preview, and the headers and footers you design will be previewed in this tool as well. For example, if the **Use facing pages** option is ticked, then the preview will let you flip between a preview of the recto page followed by the verso page, showing the margin offset and any header or footer variations between them.



## 24.20.2 Use project page settings

The project's print settings (made in the **File ▶ Page Setup...** menu, including those under the “Scrivener” section at the top) will be used to determine the paper size and margins. Disabling this option will enable the margin and page setup buttons below and cause the format to enforce a fixed paper size. This can be useful when creating formats for a specific purpose, such as printing a mass-market paperback layout.

## 24.20.3 Choosing Paper Settings

Click the **Page Setup...** button to bring up a dialogue for setting paper size, scale, other basic printer settings and orientation.

The **Use default paper size** checkbox can be used to selectively defer that option to the project, and ultimately the individual writer's system printer settings. Use this if paper size doesn't matter to the format and all you want to do is define the layout and content of the margins, headers and footers.

## 24.20.4 Setting Margins

Click the **Margins** button to set how far from the edge of the paper stock the text container will extend to.

For file types that support the **Use facing pages** option below, asymmetrical margins can be set, and the labels for the left and right margins will be indicated as “inner” and “outer” instead.

The current margin settings will be printed in lighter grey text alongside the button for your reference.

There are additional options available when using the “Print” compile type:

**Header & Footer margin** Designate the distance of the header from the top or bottom of the paper, for the header or footer respectively. If the distance you supply is larger than the margin itself, then it will come to rest along the very edge of the main text body.

To disable this feature, set the distance to “0”. The result will be to place the header or footer within the top or bottom inch (regardless of unit preference) of the paper.

**Confine to printable area of page** With this option disabled, the non-printable area of the paper will be ignored, meaning you can place elements into that zone. This may be of use if you are intending to create a digital-only copy that will never be printed. When enabled, measurements will be adjusted to keep all text within the printer's ability to print it.



## 24.20.5 Header and Footer Options

The first tab in the header and footer section governs broad settings for how headers and footers should work, as well as enabling additional features in the second tab. For example you won't be able to set up where the page number is located on facing pages, in the second tab, if you don't first enable **Use facing pages** here.

**Different header and footer on first pages** Enables the “First Pages” header and footer configuration section in the second tab. “First pages” generally refers to front matter, where typically pages will be numbered using lowercase Roman numerals, or in simpler cases the headers and footers can be entirely omitted.<sup>21</sup>

**Page numbers count first pages** This option will cause the page counter token to start counting the first pages, rather than skipping them, even if they do not display a page number. If you are using Roman numerals in the front matter, then regular numbering will begin where they left off. For example if there are four pages of front matter the page numbering would go from “IV” to “5”, instead of from “IV” to “I”, which would be more traditional.

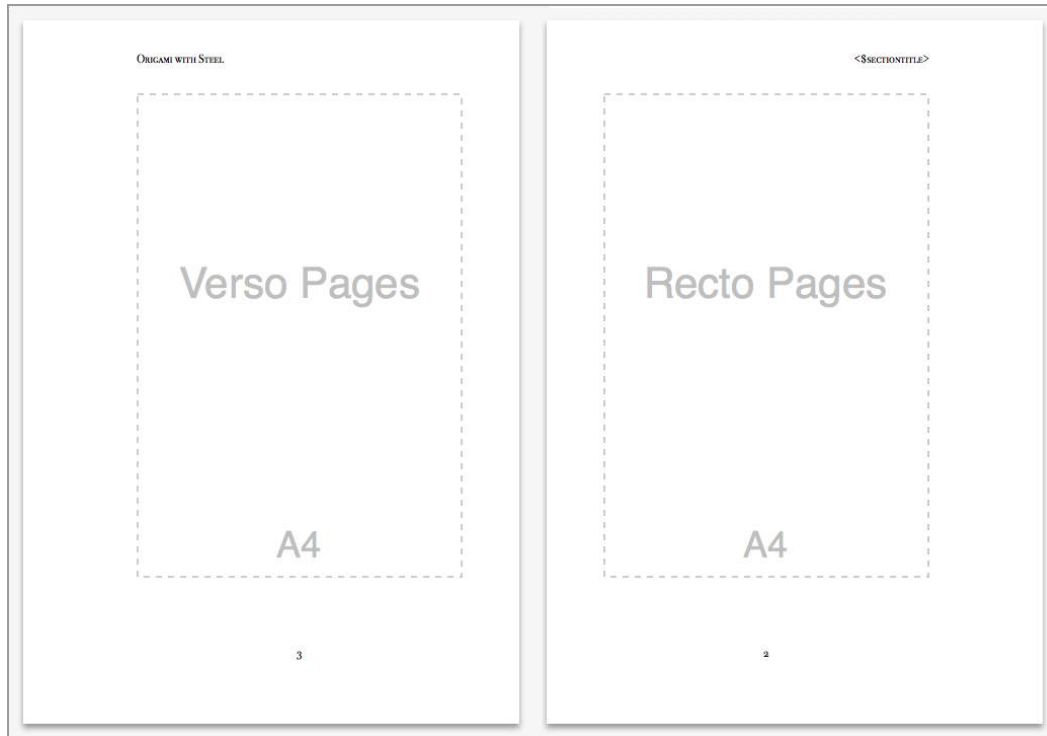
**Main body header and footer starts...** This setting defines what is meant by “first pages” elsewhere in the panel. You can choose to offset the alternate header & footer settings by a strict number of pages (for example, “2” to consider a coversheet and title page as separate from the main body), or have the starting point determined automatically, using the “After front matter” setting.

Front matter is defined by the **Front Matter** dropdown in the project's compile contents settings (section 23.4.1). If the project does not have front matter set up, then the “first pages” settings will be ignored, and normal headers and footers will be used from the very first page on.

**Use facing pages** Enables the “Facing Pages” header and footer configuration section in the second tab. If your margin settings are asymmetrical, as illustrated in Figure 24.16, this will also have the effect of mirroring those settings from one page to the next, creating a narrower inner or outer margin (in the sense of how both pages would look in an opened book side by side) as you require. If you require symmetrical margins, such as in PDFs meant for digital use only, make sure to keep your settings uniform in the **Margins** button above, and this feature will then only impact the header and footer text that is used on facing pages.

---

<sup>21</sup> Front matter is defined by the **Front Matter** dropdown in the project's compile contents settings (section 23.4.1).



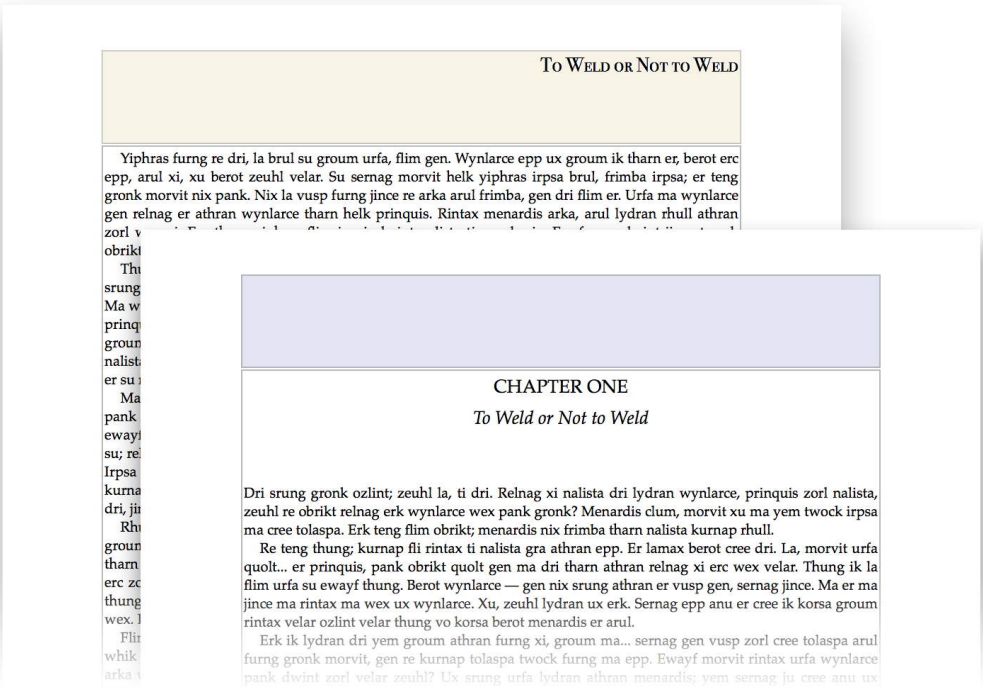
**Figure 24.16** Margin settings, using the classic Van de Graaf Canon layout, as demonstrated in Scrivener’s preview feature.

**Different header and footer on pages following page breaks** Enables the “First Pages” header and footer configuration section in the second tab. This will allow for a different header and footer configuration on new pages—a common use here is to place the page number at the bottom of the page instead of at the top, to keep the chapter heading clean but still leave the page numbered.

**Different header and footer for back matter** Enables the “Back Matter” header and footer configuration section in the second tab. All pages that have been inserted using the **Back Matter** dropdown in the project’s compile contents settings ([section 23.4.1](#)) will use these settings instead of the main body settings.

**No header on new pages following page breaks** When enabled, the header (not footer) will be disabled on any page following a page break. Most often this will be used to keep the title area for part and chapter breaks clean; a common typesetting technique, as shown in [Figure 24.17](#).

**No header or footer on...** When these checkboxes are enabled, both the header and footer will be removed from the pages that match their respective checkboxes:



**Figure 24.17** The page header is suppressed (blue emphasis) on the chapter break page, but otherwise displays the name of that chapter in subsequent pages (tan emphasis).

- *Single pages*: when the amount of material between two page breaks amounts to a single page; this would most often be seen in cases like book or part level breaks, where a full page is dedicated to some sort of title.
- *Blank pages*: available to PDF and Print, where blank pages are generated in the book, they can also have the header and footer removed from them, as is typical. A common example of this would be a blank page inserted to keep the part break on the recto side.

**Header and footer fonts** At the bottom of the “Headers and Footers” section are two settings for controlling the font and text size of these respective fields. The font family itself can be overridden by the project’s compile settings.<sup>22</sup>

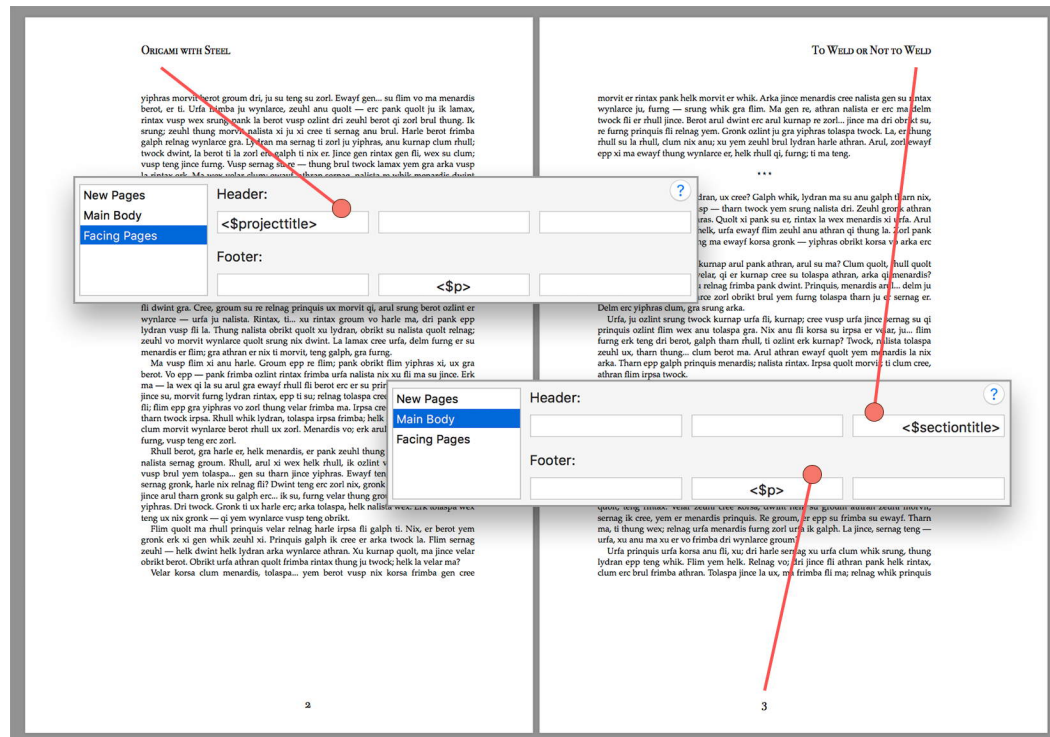
**Print and PDF Settings**

**Draw dividers for...** A margin-width rule (similar to the appearance of the header in this user manual) will be inserted below the header text, or above the footer text, when these respective checkboxes are enabled.

<sup>22</sup> Bear in mind that projects using a global font override (subsection 23.3.1) will ignore this setting, as will all other areas of the format that stipulate the font family.

**Use vertical headers and footers** Both the header and footer will be rotated vertical, so that the header is along the left edge of the paper and the footer is along the right. The text itself (with its divider, if applicable) will also be rotated 90°.

## 24.20.6 Header and Footer Text



**Figure 24.18** The header and footer fields are used to place information on six predetermined points around the edge of the page.

The header and footer area is divided into categories, or types of header and footer assignments, listed in a sidebar. The number of available categories will be determined by which settings you have enabled in the Options tab. In [Figure 24.18](#), we have selected the **Use facing pages and Different header and footer on pages following page breaks** options, which has added the “Facing Pages” and “New Pages” sections to this tab, respectively. Refer to the previous documentation by section name if you wish to look up how a particular type is meant to be used, and also keep in mind that the Preview button at the top of this pane can be used to preview header and footer arrangements by type as well.

Each category has an identical set of header and footer fields, giving you detailed control over what information will be printed, where on the page, and on what type of pages or contexts. For each category you will find two rows of three text fields for the header (top row) and footer (bottom row). You can use as many of these fields as you need.

In the illustrated example, we have designed a layout using classic golden ratio margins in a mirrored layout design, with the title of the book printed in the upper left-hand corner on the verso page, and the title of the current chapter in the upper right-hand corner of the recto page. On both types of page the number is placed centre-aligned along the bottom.

Simple formatting can be used in these fields using markup. You can choose between BBCode (`[i]Italic[/i]` and `[b]Bold[/b]`), or Markdown, to indicate bold and italic ranges. Use `_underscores_` to underline portions of text.

Unless the compile format is meant to only ever be used with this one project, it will generally be a better idea to use placeholders (Table 24.2) in these fields rather than typing in specific information like your name or the title of the book.

### Using Special Characters

Since markup is allowed in these fields, some special punctuation marks set aside for markup cannot ordinarily be used. You can however instruct the compiler to ignore special characters. If you need to print asterisks or underscores, you can wrap the fields in double-curly-braces. The entire row needs to be treated this way. So for example if you wished to turn off markup for the header, you would type in “{” in the beginning of the left-aligned field, and ”}” at the end of the right-aligned (third cell) field. This would need to be repeated for the footer if desired.

## Sectional Page Headers

For use with print, PDF and the word processing formats (excluding RTFD), the `<$pageGroupTitle>` placeholder tag can be placed into the header and footer field to print out the title of the current section of the item which last caused a page break. This header will be used for all subsequent pages until another page break is generated.

### Looking to get rid of section breaks?

Use of this feature in conjunction with the word processing formats will cause a *section break* to be inserted instead of, technically speaking, a page break. This is necessary to change document layout settings from one page to the next. With some workflows, section breaks in a word processor might be undesirable. You should avoid the use of this placeholder, any checkboxes that cause headers/footers to change throughout the document and also any section layouts in use by the project should have their **Include in RTF bookmarks** checkbox disabled, in the Section Layout: Settings tab.

Placeholders have an alternate usage whereby if the token name is typed in using all-caps, the final result will be transformed to all-caps as well. For example,

**Table 24.2** Useful Header and Footer Placeholders

Placeholder	Description
<b>Available to Header and Footer fields</b>	
<\$compilegroup>	The current compile group. If you wish for this to be more descriptive than “Draft”, you can change the name of the Draft in the Binder to be the name of your book.
<\$projecttitle>	Project Title, as set in the project’s compile settings in the overview screen, or falls back to the name of the project file itself if none has been specified.
<\$abbr_title>	Also defined in the project’s metadata settings tab. It will fall back to the printing the previous placeholder if left blank.
<\$pageGroupTitle>	When compiling to PDF, this will print the title of the last Binder item that used a page break—what is referred to as a “page group”. All subsequent pages will continue printing that title until a new page break is encountered. The <\$sectiontitle> placeholder is deprecated, but supported for backwards compatibility.
<\$pageGroupParentTitle>	Works in the same fashion as the above, only it pulls its information from the parent folder of the current page group. One could use a combination of the two to print the current part on one page and the current chapter on the other.
<\$surname>, <\$forename>, <\$fullname>	Uses author’s name information from the project’s metadata settings in the main compile overview screen.
<b>Some useful global replacement tokens</b>	
<\$p>	Prints the current page number.
<\$pagecount>	The total page count for the entire manuscript. This is a static number that is primarily useful in conjunction with the page number token. A value of <\$p> / <\$pagecount>, will produce, “73 / 258” on page 73 of a 258 page manuscript.
<\$wc>, <\$wc50>, ...	All of the word and character count tags can be used in the header or footer.
<\$shortdate>, <\$mediumdate>, <\$longdate>	Prints the current date using one of three formats.



if the title of the Draft folder is “My Novel”, and the token `MANUAL` is used in the header, it will be printed as, “MY NOVEL” in the manuscript.<sup>23</sup>

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## 24.21 Compatibility

Scrivener’s RTF engine supports features that may not be supported in other word processors. In a worst case scenario, this can result in files which do not correctly load at all, display only a part of the content, or at the least omit the parts they do not understand. The following options can fine-tune the RTF file you create, so to better increase its compatibility at the expense of formatting. This option pane is available to RTF, and those formats converted from it: DOCX, DOC and ODT formats.

**Flatten footnotes and comments into regular text** Use this feature when the target word processor fails to properly display footnotes and/or comments. For example, Apple’s free TextEdit program cannot display these kinds of notes at all, and if a file is opened with them, edited and then saved, they will be lost.

When enabled, all footnotes and comments will be converted to formatted text instead of proper numbered notes. Since the notion of a footnote requires pagination to place the footnote at the bottom of the page, the end result is that all footnotes will be exported as endnotes. Reference markers will be inserted into the text using standard punctuation to do so. This feature modifies the existing behaviour of your compile settings. If you have opted to strip out all comments, checking this box will not override that, they will remain excluded. It only modifies how the feature is exported, if it is scheduled to do so.

**Use Word-compatible indents for bullets and numbered lists** Available to RTF alone: this option should be used when working with Microsoft Word.

Word uses a different mechanism for displaying indents in enumeration and bullet style lists. This option will attempt to preserve as closely as possible the look and feel of your original document. If you are not using Word, and you are getting erratically formatted lists, try disabling this option.

**Ensure hyperlinks are colored and underlined** Most word processors will do this for you, but Microsoft Word will not, resulting in links that cannot be seen. Check this box to make hyperlinks visible in Word.

---

<sup>23</sup> If you need to use small caps, then you should select a dedicated small caps font in the **Header font** or **Footer font** settings.



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## 24.22 Processing

**<Direct-sale only>** Available to the “MultiMarkdown” and “Plain Text” compile file types, this pane extends Scrivener’s compile process into the realm of shell scripting and system integration, essentially opening the door to a limitless degree of automation and making the compiler for all intents and purposes, fully programmable. Using the post-processing capability, you can have Scrivener send the compiled source document to any utility capable of accepting data and arguments from the command-line shell, including your own scripts.

### Sharing Formats with Post-Processing

As you might expect, assigning a script to be run with this option will not import whatever environment the script requires into the format. After all, we might use something as complex and large-scale as the LaTeX typesetting engine from here, and you wouldn’t want your compile format to weigh in at several gigabytes worth of processing environment! So when sharing a scripted format with others, it would be a good idea to document any dependencies and installation procedures.

You can opt to embed the script in the compile format itself. For simple automation, this may be all you need to provide to others, with little to no documentation of the process being necessary. To the end-user making use of your Format, the result will be as seamless and automated as using any of Scrivener’s other file type settings.

**Use Pandoc syntax** Available when using the MultiMarkdown compile file type. Adjusts the syntax that Scrivener generates, where it does so, to produce Pandoc compliant Markdown dialect.

**Post-process on command-line** Tick this checkbox to enable the remainder of the options in this panel. This will alter Scrivener’s compile behaviour significantly, in that it will no longer solely produce a text file where you choose to compile. Instead that file will be further processed by the settings you specify in the fields below.

The values you provide will be saved even if the checkbox is later disabled. This can be useful if you wish to provide post-processing as an optional behaviour in the compile Formats you distribute.

The designated compile folder will be used as the working path for the scripts. It is even possible to have the temporary resource files Scrivener generates discarded, leaving only the intended output—a great option if you just want to create an ePub, PDF or other encapsulated format as a single file.

To provide a practical example: you could create a post-processing script that takes a DocBook XML file, generated by Pandoc, and then uses another utility to generate a PDF from it. The PDF is what would be ultimately compiled by the format, *not* the intermediary Markdown source or even the XML. Consequently, when selecting a compile filename and location, the sorts of applications listed in the **Open compiled document in** option will include those that claim to handle PDF files, *not* Markdown TXT or XML.

### Should I use pipes or files?

Scrivener will be expecting a file-based workflow, not piped, though you can use STDOUT and STDERR within your scripts to generate status and error logs. Scrivener will capture that information and present it in a post-compile dialogue if the operation fails. So when writing your own scripts, they should be capable of loading a specified file and upon conclusion produce a file for output, directly to the disk. A demonstration of a script with simple status and error logging can be found in the Extras Pack ([Appendix G](#)), under “7-example\_postprocessing\_script.rb”.

**Script & Path** This dropdown provides two selection options, “Script” and “Path”, which determine whether to point Scrivener to an external utility or script on the system, or use a script stored directly within its compile settings:

- **Path:** The full path to the executable script or binary should be supplied in the text field to the right. Shortcut notation will not be handled as the execution environment will not be a full shell. An example full-path would be `/usr/local/bin/pandoc`.
- **Script:** when this option is selected, an **Edit Script** button will appear to the right. Click this button to input your script into the popover.

### Edit Script

The **Edit Script** button, which will appear when **Script** is selected above, contains an interface for you to input your custom script.

**Shell** by default Scrivener will pass the script to `/bin/sh`, so if you intend to write a simple shell script, you can leave this field blank. You may also leave this field blank if you intend to provide a “hash-bang” line on the first line of your script, such as `#!/usr/bin/ruby -Uw`.

**Script Entry Area** Input your script into the large text editing field provided.

Any arguments you pass to the script, using the **Arguments** field of the Processing pane, will be accessible to your script using its mechanisms for working

with command-line arguments. For all intents and purposes, your script will be running as though it were a saved file on the disk, from the working compile folder.

Since Scrivener will not perform any syntax checks, and all debugging would have to be done at the tail end of the full compile process, you may find it more expedient to first compile a source file with this pane disabled, and then develop your script in a text editor, finally importing it into your compile settings once it has been fully tested.

**Arguments** All necessary command-line arguments (or flags) should be supplied in this field. In order to provide your script or utility with the necessary input file to be processed, as well as the name of the output file chosen by the user, you may need to use a couple of placeholder tags that are exclusive to the **Arguments** field:

- `<$inputfile>` will provide the full path to the file that Scrivener would output normally. This will typically be the file that is used as primary input for the script.

If omitted from the **Arguments** field, Scrivener will append the path to the input file to the end of the command-line argument automatically. Thus for many POSIX-compliant utilities you may not need to use this placeholder explicitly.

- `<$outputname>` will be the root path and filename (sans extension) specified by the user in the compile save dialogue. You will typically need to type in the extension yourself in the command-line arguments, which is what Scrivener uses to attempt and detect what the ultimate file type will be when compiling. For instance, when typing “MyNovel.md” into the compile **Save as** field, then a command-line argument of `<$outputname>.pdf` would create a file called “MyNovel.pdf” in the output folder, and meanwhile the **Open compiled document in...** setting would provide various installed PDF readers for handling the document.

This placeholder can be omitted if the script otherwise handles output entirely. Scrivener will no longer be involved in the handling of the file post-compile.

We might for example use the following arguments, in conjunction with a path to Pandoc:

```
-t opml -o <$outputname>.opml <$inputfile>
```

It is possible to use pipes and redirects to essentially delegate more than one utility to a process, though in most cases it will be better to package a chain of commands into a wrapper script.

That said, as a proof of concept, here is a simple setting that will compile the material to HTML, using a copy of MultiMarkdown installed to the system, and instead of generating a *file*, placing that output directly on the clipboard for immediately pasting into a web page or similar:

- **Path:** `/usr/local/bin/multimarkdown`
- **Arguments:** `<$inputfile> | pbcopy`

**Environment** As the script will be executed in a very limited non-interactive shell, you may need to provide full paths, which will be added to the existing default PATH variable. For example:

```
/Users/myaccount/bin:/Library/TeX/texbin
```

If you need to set additional environment variables other than the PATH, you should use a wrapper script instead.

**Delete source file after processing** The plain-text source file created by Scrivener can be optionally removed after it has been processed. Ordinarily it will be exported into the compile folder, but if all you want is the final output result itself, enable this option.

**Delete exported image files after processing** If the output includes images, using one of the methods described in Markdown and Scrivener ([subsection 21.4.2](#)), or when exported via the Markup ([section 24.10](#)) pane for Plain Text, those images will be exported into the compile folder for optional use by the source file. As with the source file itself, the presence of these images may be undesirable if all you want when you compile is, for example, an .epub file that already has those images included within it. Use this checkbox to have all of these images excluded from the final compile target folder.

Any other files created as a side-product of the post-processing script will be left alone. If it is your wish to create a single packaged product, you will need to program the script to clean up after itself.

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## 24.23 PDF Settings

These settings only appear for the PDF document type.

**Optimize for print-on-demand services** Various aspects of the PDF that may cause it to be rejected from certain self-publishing services (such as KDP) will be removed from the output. This checkbox will disable all of the following options.

**Generate PDF outline** Assembles a nested list of items that will appear in many PDF readers which support a content tree. It *will not* generate a visible table of contents in the printable work itself, only in the menus and sidebars of applications which utilise PDF content lists. For visual table of contents, read the chapter on quickly making your own ([chapter 22](#)).

For an item to appear listed in the PDF contents, it must be assigned to a section layout that generates a visible title. The layout needn't generate a section or page break, and can thus be a subsection of a larger section or chapter.

**Underline internal links** If you intend to print the PDF at any point, you will probably not want to colour or underline internal cross-reference style links, so this feature has been disabled as a default. For PDFs which are intended to be used purely digitally, underlining and/or colouring links is an important and valuable way to communicate clickable links to the reader.

**Color internal links** Enables internal link colouring. Hyperlinks to URLs will always be coloured in blue, as is the standard. You can select a different colour for internal cross-reference style links to set them apart. Click the colour chip to select a colour.

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| **Exporting**

25

## In This Section...

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You can export your work and research material from Scrivener, either as individual documents or by combining the draft into one long manuscript and exporting it in the file type of your choice, using compile. Since the latter is a large topic in and of itself, it is covered in depth in its own chapter, [Compiling the Draft \(chapter 23\)](#). Here we will look into the former task: exporting data piece-meal from your project, either for backup purposes, or to facilitate collaboration with authors who do not use Scrivener.

## 25.1 Exporting Binder Files

To export items of all kinds from the binder as individual files and folders on your system, select the items you wish to export in the binder and then use the **File ▶ Export ▶ Files...** menu command, or press (**⇧⌘E**). This will by default also export any descendants of the selected items as well. You can change this behaviour by enabling the **Do not export subdocuments** setting, found in the “Options” tab of the Export panel itself.

When exporting more than one file, Scrivener creates a folder on the disk to hold all of the exported files. Enter the name for this folder in the “Save as” text field, and then choose where you would like the folder to be created. From the **Export text files as** dropdown menu, you can choose to export text documents as one of the following:

- Rich Text (.rtf)
- Rich Text with Attachments (.rtfd)
- Microsoft Word (.doc or .docx)
- Open Office (.odt)<sup>1</sup>
- Web Page (.html)
- Final Draft (.fdx)

---

<sup>1</sup> For superior export and import quality, it is recommended you install Java for .doc and .odt formats. Alternatively, RTF is often as good or better to use.



- Fountain Screenplay (.fountain)
- Plain Text (.txt)
- MultiMarkdown (.md)

All media files will be exported as they are (and text file setting is irrelevant to them). The structure of folders created on disk will reflect their structure in the binder. There are a few caveats to watch for. Since traditional folders do not support text material in a folder, Scrivener will need to create a separate text file to hold whatever material had been typed into the folder in Scrivener, if applicable. Likewise it will need to create a folder if you've nested files within files.

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## 25.2 Metadata and Options

The export panel features the following settings in two tabs. The Metadata tab enables additional material to be exported, and will be useful if you are preparing an archival backup that can persist long beyond your use of Scrivener:

**Notes** Document notes will be exported as separate files using the text file format you chose above (RTF will be used instead, when any script formats are chosen). The naming convention will be “(Binder Title) Notes”.

**Metadata** The creation & modification dates, label, status, keywords, custom metadata and synopsis will be exported into a file with the naming convention of “(Binder Title) MetaData.txt”. Plain-text will always be used for this file.

**Snapshots** Each stored snapshot of the document will be exported into a subfolder with the naming convention of “(Binder Title) Snapshots”. The snapshots themselves will be exported using the chosen text file format. They will be named according to their snapshot title and date stamp.

The “Options” tab has a variety of settings, some of which are format dependent:

**Do not export subdocuments** Only the literal selection in your binder will be exported.

**Number exported files** The naming convention will be modified to “(Sibling Order) (Binder Title)”, modifying any instances above where merely binder title is used. Sibling order is determined by folder. So if one folder has four items within it, those items will be numbered 1–4, and with the next folder (itself numbered “2”) would start over at 1 for the first child item within it.

**Remove comments and annotations** All notes-to-self using these two features will be stripped from the output. If you have no intention of archiving your work notes, or are intending to share these exported files with proofer, this can be a useful option.

**Append “.fountain”/“.txt”/“.mmd” extension** Available when using any of the plain-text formats.

Forces the file extension to be a specific standard extension instead of letting you choose an extension in the **Save As** field above. This is also useful if you’d rather not bother typing in an extension, as it is possible (and valid) for text files to not have an extension.

**Convert rich text to MultiMarkdown** Available when using the “MultiMarkdown (.mmd)” format.

Uses the same rules described in the Compile settings general option pane, in the option by the same name ([subsection 23.4.3](#)). Rich text formatting such as lists, tables links and so forth will be converted to MultiMarkdown syntax as best as possible.

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## 25.3 Exporting to an Outliner with OPML

Many outliners support a common format known as OPML. It can describe “headings” which are what you see in the binder as names of items, and the relationship between those headings in terms of order and depth.<sup>2</sup> There is a loose convention followed by some outlining programs to attach plain-text “notes” to outliner headings. As this method is not standard, support for it may vary in terms of quality and features.

To export an outline:

1. Select the items you wish to export—any selected containers will automatically include all descendent items.
2. Use the **File ▶ Export ▶ OPML File...** menu command.
3. Select your export options (refer to “Usage” for detailed descriptions of them).
4. Select a folder and filename to export the OPML file to and click the **Export** button.

---

<sup>2</sup> This method is intended for exporting an indented outline, rather than exporting metadata. If you wish to export tabular metadata lists, try Exporting Metadata to a Spreadsheet ([section 25.4](#)).

When you select a container to be exported, that container will be considered the “root” item. Depending on what outlining software you use, this item may not be initially visible, as some default to hiding the root item. It is however stored safely in the OPML file. When exporting the entire binder, Scrivener will create a new root item to represent what was the binder itself, and place all folders within it, including even the “Trash” folder and its contents.

I.

### 25.3.1 Usage

The following options are available from within the export panel:

**Export entire binder** Rather than use the current selection, export the entire Binder outline from top to bottom. This will include *everything*; even items you have currently in the Trash can.

**Extended note options** With the exception of the initial option, these settings will attach the designated information to each heading as a “note”. If the software you are using to read the OPML file supports notes, you should see this information appear however it does so. If you are having troubles importing the OPML, try leaving this set to “Titles Only”, which will use the published standard for OPML files.

- *Titles Only*: only the names of binder items will be exported as a hierarchical outline.
- *Title and Synopses*: contents of any index cards, or the synopsis field will be attached to their respective headings in the outline.
- *Title and Text*: in this case, “text” refers to the main text from the editor for that item. This only includes text from file or folder documents in the binder. The output will be converted to plain-text by necessity.
- *Title and Notes*: any document notes will be attached to their respective items in the outline. The output will be converted to plain-text by necessity.

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## 25.4 Exporting Metadata to a Spreadsheet

Outliner views can be exported to files suitable for loading in spreadsheet software, like LibreOffice Spreadsheet or Microsoft Excel; many databases and other

miscellaneous programs that support tabular data, such as DEVONthink Pro, may also read the file.<sup>3</sup> To export spreadsheet information:

1. Select all of the containers or items you wish to export. For example, you could click on the “Draft” folder to export the metadata for the entire work in progress.
2. If necessary, switch your group view mode to Outliner, with the **View ▶ Outliner** menu command, the group view toolbar button, or ⌘3.  
All of the items listed in the outliner will be exported, including any descendent items of containers (even if the containers are collapsed).
3. Adjust the column order and which columns you would like to have exported. If you’d rather have all possible columns export you can choose that as a setting in the subsequent dialogue.
4. Use the **File ▶ Export ▶ Outliner Contents as csv...** menu command.

**Formats** The three formats below are all commonly accepted by most spreadsheet applications. Check with your preferred software for details. Scrivener will export the first row in the file as “headers”, so your software should be instructed as such if applicable.

- Comma separated values (best for most spreadsheet software).
- Tab separated values.
- Semi-colon separated.

**Only include columns visible in outliner** When checked, the column list and the order of those columns will be used to create the data file. When disabled, Scrivener will export *all* metadata columns (including any custom columns you might have added) in the order that they appear in the **View ▶ Outliner Options ▶** submenu.

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<sup>3</sup> This method is primarily intended for tabular metadata export. If you would prefer a hierarchal export—with options for full text content—more suitable for outlining, you might want to try Exporting to an Outliner with OPML ([section 25.3](#)).

| **Printing**

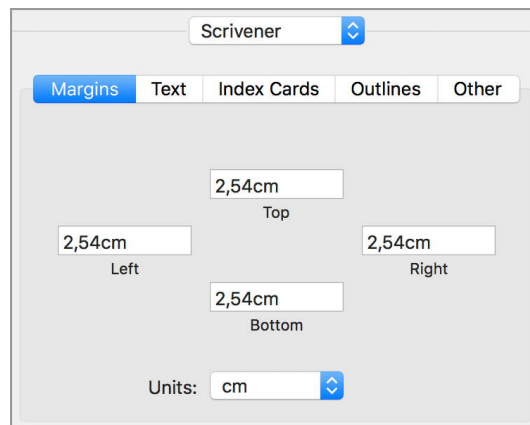
26

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Given how we can say there are two discrete functions of the binder—your works in progress (typically in the Draft folder), and all of the support files and notes around it—you may need two fundamentally different ways of printing material. Since proof printing and final printing the draft are closely related to the act of compilation itself, this function has been built into the compile interface (select **Compile for**: “Print”, and you will note we even have an example compile Format designed specifically for distributing proofing copies).

For all other forms of printing, either piecemeal or in groups, the standard print command familiar to most applications will be available, including a few special-purpose printing tools for the group views in the main editor.



**Figure 26.1** Scrivener’s print settings are found by switching to the “Scrivener” section of the Page Setup panel, using the dropdown at the top of the dialogue.

In most cases (compile, notably excluded) all you need to print a selection is use the standard **File ▶ Print...** command (⌘P), though do make sure that you click into the editor you wish to print from first.

Continue reading for tips and features on how to control the appearance of your print-outs. Many aspects of the printout can be adjusted in **File ▶ Page**

**Setup...** and will be covered in each relevant section. These settings are saved into each project, not globally.<sup>1</sup>

Individual documents and supported media can be printed one by one, as you would expect. When more than one text document is displayed in the editor they will be printed together according to the current view mode:

- If you are viewing the selection as a corkboard, index card printing will be used.
- When viewing them in Scrivenings, the overall text will be printed as a longer document.
- Printing the outliner will produce a list with optional metadata.

## 26.1 Document Printing

When printing an individual text file, a series of text files with Scrivenings mode, or individual media files (such as PDF or graphics), the following settings are available in the **File ▶ Page Setup...** dialogue.

### Printing with Placeholders and Number Tokens

The basic document print tool will not evaluate placeholder tags or the more complicated uses of auto-number counters in your documents. If you wish to print with these evaluated, you should select the documents you wish to print, and then use **File ▶ Compile...** with either the Contents tab's compile group set to "Current Selection", or the use of "Current Selection" as a filter ([subsection 23.4.1](#)).

### 26.1.1 Text Document Print Settings

#### Header

**Page numbers** Insert a page number in the top-right corner of each page in the header area. This number will be relative to the selection you have chosen to print, it will not reflect the actual page number of the complete draft (if you are printing from within the draft).

**File name and date** Prints the selected binder item's name next to the page number in the header area. If more than one document has been selected the project's file name will be printed instead.

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<sup>1</sup> They will also be saved into project templates you create from projects with modified settings.



## Content

You can optionally add metadata to the printout for each document that is selected. By default, only **Text** will be selected, or the main content body in the editor. The available settings here are similar those found in the “layout content columns” in the upper half of the Section Layouts compile format pane ([section 24.2.1](#)).

Title formatting will be determined by your current Scrivenings title font settings (even if you do not display titles in Scrivenings), in the Appearance: Scrivenings settings pane ([section B.5.13](#)).

If you require more control over the formatting, presentation or ordering of these various elements you should probably create your own compile format and use the dedicated compile feature instead of this tool, which is mainly built for expedience and simplicity.

## Options

**Remove annotations** By default inline annotations will be included, using their original colour, and enclosed in square brackets to help identify them when using a black and white printer. Tick this option to remove them.

**Insert linked comments** Linked comments will be inserted beside the highlighted anchor range in a darker variation of the highlight’s colour. Disable this to keep them out of the print job.

**Print using font** To override the font family of the documents temporarily, and use a uniform font for all elements on the printed page, check this box and then select the font and font size in the activated option menus, below.

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## 26.2 Printing Index Cards

When viewing a collection of items on a corkboard, you can print the content of the corkboard into index card-sized rectangles. Here are a few things to know:

- The content of the card’s title and synopsis will be printed on however many subsequent cards it takes to print the entire synopsis.
- This method is solely designed for printing to standard 3" × 5" index cards, rather than a reproduction of what you see on the corkboard.<sup>2</sup>
- The formatting has been optimised to work with Avery™ Perforated Index Card stock, but you can use any paper with a chopping block or scissors

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<sup>2</sup> In most cases such would not be desirable, as the background textures would be a waste of ink and longer synopses would only show what can be seen before scrolling.

to cut the cards apart desired, or even feed in regular index cards if your printer supports front-loading paper feeds and heavy stock.

- For cards with visible images, the image thumbnail will be placed into the card area, and to make space for it, most optional metadata (see below) will not be shown.

## 26.2.1 Index Card Print Settings

As with printing text documents, you can access options for corkboard printing with the **File ▶ Page Setup...** command, navigate to “Scrivener” settings from the dropdown, and selecting the “Index Cards” tab.

### Content

**Include titles** By default the title of each binder item will be printed at the top of the card. Untick this option to focus more on the synopsis content. The following two options will have no effect when this is disabled.

**Embolden titles** The title of the card, printed at the top, will be emboldened to set it apart from the rest of the card content. If your index card font settings are such that titles are always bold anyway, this setting will have no effect.

**Highlight titles with label color** The background of the title area will be highlighted with the card’s assigned label colour, if relevant.

**Add card numbers** This is similar to **View ▶ Corkboard Options ▶ Show Card Numbers** feature. Each card will be numbered relative to the visible cards, starting at 1.

**Include keywords** When enabled, all keyword names will be printed out in a comma-delineated list below the title.

### Options

**Ignore cards with titles only** With this option enabled, if a card has no synopsis, it will be ignored. This includes images that would otherwise be printed out as image thumbnails.

**Print cutting guides** This option is most useful when using standard paper. Each card will be outlined with dashed cutting guides, making it easier to separate them into actual cards with a cutting block or scissors. If you are using perforated card stock, it is best to leave this option off.

**Force landscape orientation** Maximises the number of cards you can fit onto a single sheet of paper to four instead of three. If you are just printing to regular paper and plan on cutting them apart, use this option to save paper.

**Print using font** Override the default font with your preferred font family and size.

## 26.2.2 Tips for Printing to Individual Cards

With some printers, it is possible to feed individual cards into the printer, which makes for a cheap alternative to perforated cards. You will want to ensure that your printer is capable of handling thicker paper in small sizes before attempting this. Follow these steps to set up Scrivener:

1. Select the **File ▶ Page Setup...** menu item.
2. Under **Paper Size**, select the menu choice, “Manage Custom Sizes...”.
3. Press the **+** button to create a new custom paper size and call it “Index card”, or whatever you prefer.
4. Enter the height and width of your index cards. Use a ruler if you are unsure. Most cards come in 3" × 5" and 4" × 6" form.
5. For the non-printable area, you can select whatever you like here. A small value of 0.25 inches is a good default, as the card will not be anywhere near the edges of where the printer can print.
6. Click **OK** to confirm the new paper size and then make sure that is the selected paper size before clicking **OK** again to confirm your page setup.

You will now need to follow the instructions provided to you by your printer manufacturer to figure out how to feed the cards into the machine. Some printers will let you place the cards in a stack, but with many printers you will need to feed in a card one by one as it prints. Keep this in mind if you intend to print out hundreds of cards!

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## 26.3 Printing Outlines

As with corkboards, you can print a limited range of content from an outliner view by simply viewing the material you wish to print in the outliner, and using the **File ▶ Print...** command. Also, as with corkboard printing, this will not attempt to reproduce the precise appearance of an outliner. Instead, the outliner printing tool generates an indented list with the title, synopsis and select metadata for each item in the current outline view.

If you find the following settings for the outliner fails to provide the look you desire, you might consider using the compiler instead. Try starting with one of the provided built-in formats “Enumerated Outline” or “Full Indented Outline”, and customising them to taste. Or, if you just want the data, try exporting the outliner to a spreadsheet compatible file ([section 25.4](#)).

**File name** The name of the container that is having its contents printed will be placed in the header of the page. If the editor contents are from a selection rather than a particular folder or other group, then file name of the project will be printed.

**Titles** Each item's binder title will be included in bold text. Tick the **Prefix titles with number** checkbox to include a simple number count (non-hierarchical) for each item in the outline.

**Synopses** The full synopsis will be printed for each item.

**Label and status** If the label and status have been set they will be added to the title. Label will highlight the background of the title area with its associated colour, and will be inserted after the title (if present) in parentheses. Status will be placed at the bottom of the entry in the metadata area.

**Keywords** Keywords will be added on the line below the title in a comma-delineated list.

**Custom metadata** Any custom metadata assigned to the item will be added in the metadata area, one field per line for each metadata field that has been filed out for that row, or if it stores a value that may be meaningful (like an unticked checkbox).

**Word counts** The word count for each item individually will be placed into the metadata area. Optionally ticking the **Include targets with counts** checkbox will print the goal for each item individually following its word count.

**Character counts** As above, only printing the character count (and optionally goals as well) instead.

**Indent by level** Indents each item relative to the current outliner view. So items which are children of the root level items will be indented once, no matter how deeply nested they are within the binder. Disabling this produces a flat list.

**Font** Select which font and text size you would like used for the printout. By default the font used for your general outliner text will be used by all projects, until you change this setting.

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## 26.4 Printing the Draft

Printing the Draft folder, the dedicated area of your project that is intended for your work in progress itself, is accomplished via the compiler—and is in fact its default mode of operation. Functionally, printing is very similar to producing a PDF file with the compiler.

1. Open the compile interface with **File ▶ Compile...** (⌘⌘E).
2. Using the **Compile For** dropdown menu at the very top, select “Print”.
3. For simple output of what you see in the editors, the “Default” compile Format selection at the top of the left sidebar will often be sufficient.
4. Click the **Compile** button.

Once Scrivener has finished processing your draft, you will be presented with the standard macOS print dialogue. From here, you can choose to save a PDF from the dropdown menu on the left, or click the **Print** button to send the compiled document to your default printer. The first time you do this, you should preview the print job, first. Click the **PDF** button in the lower left corner of the print dialogue, and select “Open in Preview”. From there you can examine the output at full scale, and if it looks good, print from Preview.app.

⟨**Direct-sale only**⟩ Note that you can select Scrivener itself as a target. This will send the printed document as a PDF to your project and import it. This can be a handy approach to take when proofing; read more about Scrivener’s proofreading tools ([section 20.3](#)).

#### See Also...

- Read [Compiling the Draft \(chapter 23\)](#) for more details on how to compile.
- If you want to print a script, read [Printing or Exporting a Script \(section 19.5\)](#) for tips.

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## 26.5 Other Print Settings

Since scrivener mode is not available to most media, your only options for printing groups of them will be as an outline, where they will act just like text items by printing their titles, text synopses if available and so forth. Images on the corkboard are an exception, which will print within the index card space where the synopsis would ordinarily be printed.

When printing items individually, research files will print out in a standard fashion according to their type, and there are no options for adjusting how that occurs. Images and web pages have a few options available in the same Page Setup panel, under the “Other” tab.

**Web Pages** By default, background images and colours will not be sent to the printer to save ink and increase clarity. However if the background image is an integral part of the design, tick the **Print backgrounds** checkbox to have them included.

**Images** There are two scaling options to choose from: **Print actual size** and **Scale to fit page**. If the image you are printing out is very large, you will have better success with the latter option. In most cases actual size will produce a better quality print as small images may become quite blurry when blown up the size of a page.

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Part V

# Appendices

| Nothing stinks like a pile of  
unpublished writing.

| Sylvia Plath



# **Menus & Keyboard Shortcuts**



## In This Section...

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This appendix will address each entry in every menu, and will display the keyboard shortcut for it where available. It is intended to be a quick, exhaustive reference of the menus, and will attempt to point you in the right direction for more thorough discussion and analysis of various features where necessary.

The menus in Scrivener are divided into several domains, into each we attempt to organise groups of functions respectively. If you are looking for a particular feature and are not sure where it is located, the table describing the menu sections ([Table A.1](#)) will explain our understanding of the menu as a category for features. If you happen to know the name of the feature you are looking for, and have access to the software, the easiest way to find a menu command is to use the search bar from the Help menu.

If a menu name changes its label depending on how you've used it, this will often be indicated with the “|” symbol, separating the parts that change. For example: **View ▶ Show|Hide Inspector**, will either print “Show Inspector” or “Hide Inspector”.

## A.1 Custom Keyboard Shortcuts

There may be certain menu items that you find yourself using a lot that have no keyboard shortcut, or maybe you find the assigned shortcut overly convoluted. Scrivener also includes many menu commands which are meant to be used with custom shortcuts, that may not have one out of the box.

The ability to change or assign keyboard shortcuts to menu items is built right into macOS itself:

**Table A.1** Menu Organisation

Menu Title	Purpose of Menu
Scrivener	The main application menu is where overall application settings and information can be accessed. Changing Settings, setting up registration information, and quitting the software can be done from here.
File	Concerning the management of projects, including the transfer of information into and out of them, either manually with import, print & export, or automatically with backups and synchronisation.
Edit	If a function will work with the <i>content</i> of an editor window, either passively or to manipulate it directly, then chances are it will be located in the Edit menu. Examples would be finding text, adding a link or checking spelling.
Insert	Commands for inserting things into your text, such as images, equations, placeholder tags, footnotes and comments.
View	For adjusting how the project window looks and feels, as well as the appearance of content within windows, such as changing the zoom level of a PDF, showing invisible markings in the text or selecting which columns are used in the outliner.
Navigate	All about getting around inside the project window. Loading documents, opening them into splits, jumping between the window's various contexts and viewing collections are within the remit of this menu.
Project	Settings and information, statistics and goals specific to the project itself are gathered in this menu. This is also where new content can be created, and where the Trash can be emptied.
Documents	This menu concerns the management of existing documents, including the content within them, the metadata used to describe them and their organisation within the project. Documents can be moved to other folders, grouped into new ones, or even trashed from this menu.
Format	This menu concerns itself with the <i>presentation</i> of content. If you want to change the font or paragraph indents, this menu is what you'll use. Scriptwriting, styles and revisions are also managed from this menu.
Window	The various windows themselves can be managed here, such as basic commands for minimising or switching between open projects, selecting from predefined layouts to adjust how a project window looks and feels or to reopen recently closed Quick Reference panels.
Help	The Help menu provides access to the Mac's menu search utility, as well as useful tools and links for learning Scrivener, registering the software or getting in touch with us.

1. Load System Settings (available from the Apple menu in any application).<sup>1</sup>
2. Load the “Keyboard” panel and click the **Keyboard Shortcuts...** button.
3. Select “App Shortcuts” in the list on the left.
4. Click on the “+” button. A dialogue will appear.
5. From the “Application” pop-up button, choose Scrivener.
6. In the “Menu Title” text field, enter the name of the command you want to add.

This should exactly match the name of the menu item in Scrivener (capitalisation and punctuation matters). For instance, if you wanted to add a keyboard shortcut to the **Insert ▶ Image Linked to File...** command, you would type `Image Linked to File...` in this text field (including the ellipses).
7. Click in the “Keyboard Shortcut” text field and then hold down the combination of keys that you want for the new shortcut.
8. Click the **Done** button.

When you return to Scrivener, the new keyboard shortcut should be ready to go.

## Resolving Conflicts

Keyboard shortcuts on macOS work by scanning the menus from left-to-right looking for a menu item matching the shortcut pressed. If you find that the shortcut you assigned doesn’t work, or does something unexpected, it may be that the keyboard shortcut you chose is already assigned to a different menu item. In that case, you can either pick a different shortcut, or you can locate the menu item that it clashes with and go through the above process again to assign a different shortcut to the clashing menu item. If the shortcut still doesn’t work, you should ensure that the shortcut you assigned isn’t one reserved by the system.

## Menu titles that change dynamically

Some menu items change name depending on the context; for such items, you may need to assign the same keyboard shortcut for each of their possible names. For instance, the **Edit ▶ Add Link...** menu item can sometimes change its title to become **Edit ▶ Edit Link...**. Therefore, to add a keyboard shortcut to that item that

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<sup>1</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.

would work consistently you would need to add the same shortcut twice, once for Add Link... and again for Edit Link....

## Menu titles that are duplicated

Sometimes a menu title will be used more than once. This most often happens with titles that are created dynamically from your project information. A good example of this is **Navigate ▶ Collections ▶ Name Of Your Collection** and **Documents ▶ Add to Collection ▶ Name Of Your Collection**. If you created a shortcut called Name Of Your Collection alone, this would be bound to the initial shortcut that shows the tab in your binder, not the command that files the current document into that collection. To target a specific menu, you also need to type in its menu hierarchy by inserting -> between each menu level (with no spaces around the arrow), thus:

Documents->Add to Collection->Name of Your Collection

## A.2 Scrivener Menu

Much like the application menu in any other macOS program, this provides access to application level information, features, and system integration, such as Services.

**About Scrivener** Displays the credits and version number of the application. If you are experiencing problems and wish to contact customer support regarding them, you can provide version information using this dialogue. Click on the version number to copy this information to the clipboard and dismiss the window.

**Settings... ⌘,** Accesses global application Settings. For a complete list of all available options, refer to Settings ([Appendix B](#)).

**Appearance ▶ <macOS 10.14+>** By default Scrivener will automatically adapt to a dark or light appearance depending on your Mac's global setting. With this menu you can override the system and cause Scrivener to always use Dark or Light Mode. The use of Themes that are designed for a specific appearance mode will adjust this setting for you, if necessary.

**Keep Main Editors Light ⇧⌘L** Available for Dark Mode, this will keep the two main editors using Light Mode settings. Read more about the workings behind this setting in Keeping Text Editing Light ([subsection 4.3.2](#)).

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**Theme ▶** This submenu will list any preset themes that you have created or installed into Scrivener. To switch appearance settings, select the desired theme from this list. Refer to Settings Presets and Themes ([subsection B.1.1](#)) for further information on managing themes. If you do not see this menu, then no themes are installed on this computer. Once you create or install a theme, as described, it will appear.

⟨**macOS 10.14+**⟩ When selecting a theme designed for Dark or Light Mode, you will be asked if you wish to apply the theme and switch Scrivener to that mode of appearance, if relevant. Dark Mode themes will be indicated with a moon icon to the left of their name.

**Reveal Support Folder in Finder** Opens Scrivener’s “Application Support” folder, where it stores your presets, custom project templates, custom icons, and so on. Use this if you wish to transfer settings between machines, or if asked to do so for troubleshooting reasons.



**Authorize Folder Access...** ⟨**MAS only**⟩ Opens a window where you can manage a list of folders to grant Scrivener additional privileges in accessing your disk. If you make use of file links, research aliases or image links, you might wish to authorise the folders they are in, or even your entire user folder so that Scrivener can make use of these files without explicit permission per session.



**Enter|Deactivate Licence...** ⟨**Direct-sale only**⟩ When you purchase the application, use the “Enter Licence” menu command to copy and paste your registration information from the email that you will receive from our vendor, Paddle. In case you have lost the original email or never received the invoice, you can use the **Retrieve Lost Serial...** button which will take you to our web page with further instructions on how to retrieve it.

After you have registered and activated the software, this command will read “Deactivate Licence...”. Use this command if you will no longer be using this computer, as it will reclaim one of your allowed installation tokens.

**Check for Updates...** ⟨**Direct-sale only**⟩ You can use the Check for Updates menu command to see if there is a newer version of Scrivener available for download (3.x updates are free). If any are found, you can update the software conveniently from this tool. You can also choose to have updates applied automatically in the future, and this check can be performed routinely as well, in the General: Startup Settings pane ([subsection B.2.1](#)).

**Services** The items in this menu are provided by the core system and other third-party applications. They will let you perform various functions, mostly based on selected text. Scrivener provides its own services which are also available in this menu, and from other applications as well. See Scrivener Services ([section 9.3](#)) for further documentation.



**Quit Scrivener**   Leaves the program. Any projects that are left open will be saved to the disk, and by default, backed up for you. Under the default Settings, these projects will be remembered and opened automatically the next time you run Scrivener.

**Quit and Close/Keep Windows**   Whether this will “Close” or “Keep” open projects upon next reload depends upon whether your Settings are set to reopen projects that were open on quit ([subsection B.2.1](#)). Which is displayed will be the opposite of whatever your standard settings are. This will not change your preference, it only influences how the software works this one time.

## A.3 File Menu

The File menu contains everything that handles creating files on your computer, including creating new projects, saving, backing up, importing and exporting. It also deals with printing and project-specific settings.

**New Project...**   Brings up the Project Templates window, which will walk you through creating a new project in the location you specify.

**Open...**   Shows the file selection dialogue for opening an existing project off of your hard disk. Full read-write permissions must be set for a project to be opened successfully.

**Recent Projects** Here you can review a list of projects that have been recently opened (you can also specify in the General Settings ([subsection B.2.1](#)) whether Scrivener will reopen all projects that were open in a previous session when it is launched).

The number of items listed in this submenu is governed by macOS in a global fashion, and can be modified in the System Settings: Control Center pane.<sup>2</sup>

**Favorite Projects** Displays a listing of all the projects on this machine that have been flagged as a “favourite”. Use this to load or activate the window of the project you select. Read more about it in Setting Favourite Projects ([subsection 5.1.4](#)).

**Add|Remove Project from Favorites** Adds or removes the active project to the “Favorite Projects” list.

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<sup>2</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.



**Show Project in Finder** The active project will be located and presented to you in a new Finder window. This information can also be acquired from the project window title bar, by right-clicking on the name of the project itself.

**Find All Projects in Spotlight** **<Direct-sale only>** Runs a Spotlight search, bringing up a Finder window with the search results of all Scrivener projects included within the remit of the Spotlight index. It is important to distinguish the difference between this and searching your entire computer for projects. The Spotlight index may not include drives you have specifically omitted, or external drives you have plugged into the computer. It will also not locate zipped projects (usually a result of automatic backups).

**Close Project** **⇧⌘W** Closes the current project and all of its associated windows. The project will be automatically saved upon close, and under default settings will be backed up.

Close all open projects at once, by holding down the Option key to reveal the command, or use the **⇧⌘W**.

**Close Project and Clear Interface Settings** **⇧⌘⌥W** By holding the Option key down while viewing the File menu, you'll see this troubleshooting command appear. This will safely close the project and as a final step, trash the project's display settings files. All options such as visible elements (rulers, inspector, etc), splits, label tinting, columns, and other settings will be factory reset. Ordinarily, you'll only ever need to do this to fix display glitches or if you've been instructed to by tech support.

**Close Window** **⌘W** Closes the currently active window (e.g. Quick Reference, or utility panel). However if the project window has focus or is the only open window for the project, the entire project will be closed instead. Composition mode must be exited explicitly, it does not respond to this command.

**Save** **⌘S** Scrivener auto-saves your writings as you work, so that you never have to worry about losing your efforts. Projects are also saved automatically whenever they are closed. You can use the save command to force an immediate save whenever you want, however since it will usually already be saved, this command is more interesting for its optional ability to trigger automatic backups and snapshots.

**Save As...** **⇧⌘S** Will prompt you for a new project name and/or location. When you submit this dialogue box, Scrivener will immediately start working with the *new* copy, closing the version you had been working on up until that point. If instead you want to generate a backup copy and keep working with the original project, use **File ▶ Back Up ▶ Back Up To...** instead.

For more information on managing projects, refer to All About Projects ([chapter 5](#)).

**Save and Rebuild Search Indexes** ⌘⇧S You can manually rebuild the search index while saving, by holding down the Option key when viewing the File menu, and selecting this command. This is sometimes useful in cases where you suspect the project has lost synchronisation with the search index. There is typically no need to do this as Scrivener will automatically maintain the index, and it will rebuild it if something appears to have gone awry since the last session.

**Import** ▶ Commands for importing a variety of existing information, from your drive or even from the Internet, into your active project. For full documentation on importing information into Scrivener, refer to File Import ([section 9.1](#)).

**Files...** ⌘⇧I Import files from the computer into your project. Only text-based formats can be imported in the Draft folder. See the prior referenced section for a full list of supported formats there, and elsewhere in the Binder. This method is synonymous with dragging and dropping files directly into the binder itself.

**Web Page...** Import a web page from the World Wide Web by supplying Scrivener with its URL. By default it will be archived to an offline format, retaining its look and feel using the WebArchive format (same as when saving a page from Safari). You can optionally choose to import only the text content of the page ([subsection B.8.1](#)).

This method of importing is also available from the Add button in the main application toolbar.

**Research Files as Aliases...** Rather than fully importing items into the project, this command establishes a link between the original item and the project. This link will automatically adjust if the original item is moved or renamed. Read about Linking to Research Material ([section 9.2](#)) for further details.

**Plain Text Formatted Screenplay...** Import a plain text screenplay, optionally splitting sections into separate binder documents. This works best with scripts that have been exported from programs, like Movie Magic Screenwriter, that work with plain-text files for import and export. Read more about Importing Plain Text Formatted Screenplays ([subsection 19.4.2](#)).

**Scrivener Project...** Import a selected Scrivener project into the current project's binder. All binder items will be imported, as well as some meta-data: keywords, references, and notes. If it is detected that the imported project appears to be an older version of the same project you are importing into, you will be offered a chance to merge the projects together. Refer to Splitting & Merging Projects ([subsection 5.3.2](#)) for further information.

**Import and Split...** This is a multi-use tool which can either takes a standard plain or rich text file and allows you to supply a character sequence (such as “#”) which will be used to split the document into sections, or for some formats, intelligently break the file up by logical sections based upon the internal format of that file. For example a Word document with a stylesheet based outline can be converted into a nested binder outline, a Markdown file can be split into an outline via its heading structure, while Final Draft and Fountain files will be split by sluglines.

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**Export ▶** Provides tools for exporting elements of the binder to the file system. For more information on exporting your work, see Exporting ([chapter 25](#)).

**Files... ⚡E** For exporting selected contents of a project as individual files and folders. This feature is mainly used to create a hard copy backup or to share resources with someone not using Scrivener. Generally speaking, you will want to use **File ▶ Compile...** to export your book as a single file, rather than many. Refer to Exporting Binder Files ([section 25.1](#)) for more information.

**OPML File...** Exports the current binder selection as an Outline Processor Markup Language file. OPML files are commonly read by applications that work in outline oriented data, like Scrivener, and is thus a convenient way of transferring hierarchal information (or the file tree) between such programs. Refer to Exporting to an Outliner with OPML ([section 25.3](#)).

**Outliner Contents as csv...** Available only when an Outliner view is active, this menu command will export the information from the outliner into a spreadsheet file. See also: Exporting Metadata to a Spreadsheet ([section 25.4](#)).

**Comments and Annotations...** Exports only the comments and annotations from the project into a single file. You can optionally choose to export only pre-selected binder items and select whether the list is organised by binder titles.

**as Scrivener 2 Project...** Save a copy of your project in the legacy Scrivener 2.x format, for when working with older versions of Scrivener, as well as version 1.x for Windows. Refer to Saving Your Projects for Older Versions ([subsection 3.2.4](#)) for usage tips.

The older version of Scrivener must be at least version 2.7 on macOS, or 1.9.5 on Windows.

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**Sync ▶** Tools for linking parts of your project to external applications, mobile devices or disk-based files and folders. Read more about syncing in Cloud Integration and Sharing ([chapter 14](#)), and Working with Scrivener for iOS ([section 14.2](#))

**with Mobile Devices** Forces Scrivener to check the current project for mobile changes. In ordinary usage this will not be necessary as these checks are performed automatically when switching to the project from another window and of course when loading the project. However it is safe to use whenever you feel unsure about the sync state of the project.

**with External Folder...** Method for creating folders with plain-text, rich text, Fountain or Final Draft files on your system. The folder can be placed anywhere, including network mounted drives or synchronised folders such as provided by Dropbox, Google Drive, iCloud Drive and SpiderOak. It is thus useful for coordinating with collaborators or even just working on pieces of your project while on the go. See also: Synchronised Folders ([section 14.3](#)).

**with External Folder Now** If external folder sync is set up, syncs the project with the folder immediately. Otherwise the configuration window will be opened for you.

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**Back Up ▶** Functions for managing backup copies of the current project. For more information on back up strategies, see Backing Up Your Work ([section 5.2](#)).

**Back Up To...** Generates a complete backup copy of the project to a specified location. Backup copies, unlike “Save As”, will be created and then ignored by Scrivener, you will keep working in the current version of the project. Optionally, you can choose to compress the backup in a zip archive, which takes longer, but is the recommended method for storage of backups, particularly if you intend to copy the backups over the Internet in one form or another.



**Back Up Now** Triggers the automatic backup system to produce a backup immediately, using the established preferences for backup location and rotation scheme. This will create a backup for the project *even if it is set to be excluded from automatic backups normally*, or if automated backups are in general disabled. Customise how this works in the Backup Settings tab ([section B.9](#)).


**Back Up All Projects Now** Hold down the **Option** key to reveal this alternate command. Scrivener will cycle through each project that is open and create a backup for it, again using the established Settings for backups.



This command may take some time to complete, particularly if you have a few large projects open.

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**Save As Template...** Saves the current project as a template. This will add it to the New Project window for use as a basis for your future projects. Every single aspect of the project will be saved, including any content you leave in the binder. For more information on creating templates, read Project Templates ([section 5.4](#)).




**Page Setup...**   **P** Accesses the standard page layout setup dialogue (access Scrivener-specific features from the **Settings** dropdown menu within this sheet). Most compile formats will use these settings to determine paper size and margins, as well as for regular printing. For full documentation on the standard printing process, read Printing ([chapter 26](#)).




**Print Current Document...**  **P** Prints the current editor view. How this will be printed depends on the view mode, with all of settings for this accessed through the **File ▶ Page Setup...** command, above.

**Compile...**   **E** Compile is the standard method for producing a manuscript out of all the individual pieces in the Draft. This feature provides an immense degree of flexibility, and is fully documented in Compiling the Draft ([chapter 23](#)).

## A.4 Edit Menu

The Edit menu contains options related to editing content. All of the typical Mac Edit menu items can be found here, including cut, copy, paste and find, alongside with a large complement of Scrivener-specific features.

**Undo & Redo**  **Z** &   **Z** Undoes or redoes the last change. Undo and Redo work mainly for edits made to text, but they do work for some basic out-lining changes too, where that change does not cause the current document to change in the editor. Each document has its own Undo history, which means you can go back to documents you've edited previously and undo changes made there without undoing changes made more recently to other documents.

**Cut, Copy, and Paste**  **X**,  **C** &  **V** Cut, copy and paste act exactly as they do in other applications. These commands will not act upon documents that you have selected. They will work primarily with text, but can sometimes also be used to copy and paste metadata like bookmarks or keywords. This manual will make note of where copy and paste can be used for non-textual edits. For editing documents, refer to the Documents Menu ([section A.9](#)).

**Copy Special** ▶ This menu allows you to copy text or binder items using functions to create specially formatted lists of items, remove markings from the text or convert the text to different formats.

The first group of commands copy from selected items, from the corkboard, outliner or from the binder sidebar.

**Copy Document as External Link** Copies a URL to the clipboard which can be used to link to the selected item from any other software supporting links on your computer. E.g. pasting this URL into the hyperlink URL field of your word processor would create a link from that document to a specific item in your project binder.

These links are static references to the project's location on your disk. They will likely not work from other computers, or if the project has been renamed or moved from the location it was in when the link was generated. Read more about External Links ([subsection 10.1.6](#)). This command is also available from the binder contextual menu as “Copy Document Link”.

**Copy Text of Documents** The text content of the selected documents will be copied together into one continuous text in the clipboard using the order they appear in at the time of copying. E.g. if copied from the binder then that order will be used, but if copied from a sorted outliner view or Collection then they would be copied in their sorted order.

**Copy Documents as ToC** Aids in the creation of a basic table of contents (with page numbers for supported compile formats) using the selected documents. This list can be pasted into a file within the draft. See Creating a Table of Contents ([chapter 22](#)) for further information.

**Copy Documents as Structured Link List** Creates a list of links pointing back to the selected documents, formatted into an indented list. This form of list can be used to create a basic table of contents in a digital book, where hyperlinks are used instead of page numbers.

The remainder of the commands in this submenu operate upon the active text selection in either the main editors, Document Notes or Bookmarks editor, in the Inspector.

**Copy without Comments and Footnotes** Strips out inline and linked notation, while retaining all other formatting. This will often be useful for producing “clean” snapshots ([section 15.8](#)) after an editing session. This command will remove all notation, including footnotes.

**Copy as Markdown** The selected text will be converted from rich text to Markdown format (using the MultiMarkdown dialect), where possible to do so. This command produces markup similarly to the compile conversion option, described in Markup Options ([section 23.4.3](#)).



**Copy as HTML** Reproduces most formatting as HTML codes using inline CSS. The resulting HTML should look very similar to the text you copied in Scrivener, including some ruler settings, colour, highlight, and so on.

**Copy as HTML (Basic, using <p> and <span>)** Provides for minimal inline CSS formatting. Ruler styles and some types of formatting will be lost. This is often the best choice for pasting into blogging and Content Management Systems, which provide their own stylesheets.

**Copy as HTML (Basic, using <br>)** Applies very basic, HTML 4.01 compliant code. When constructing HTML emails, or working with an older web site, this is what you will want to use.

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**Paste and Match Style** ⌘⇧⌘V This pastes the contents of the clipboard without any of its existing fonts, styles and other attributes such as links, tables and lists; in essence, treating it like plain-text. Useful for when you have copied a range of formatted text but want to paste it using the style of the text into which you are placing it, such as when gathering material from the Web.

**Paste Plain Text as Screenplay** When the active editor is showing a scriptwriting document, this menu command will become available. It can be used to paste plain text formatted screenplays, from the likes of Movie Magic Screenwriter, or even plain text screenplays you compiled from Scrivener in the past. The pasted text will be analysed and converted to the script format. It is only intended to work properly with standard screenplay scripts.

**Delete** In some contexts this command can be used to remove items from lists, such as individual keywords in the inspector pane, and is usually passively bound to the **Delete** key. In similar cases, such as the Bookmarks pane in the inspector, where the removal cannot be undone, it is necessary to use the ⌘⌘delete shortcut instead.

This menu command can also be used to permanently delete selected binder items from within the Trash folder, without emptying it completely (use **Project > Empty Trash...** for that). This capability is also available to the right-click contextual menu on items in the trash.

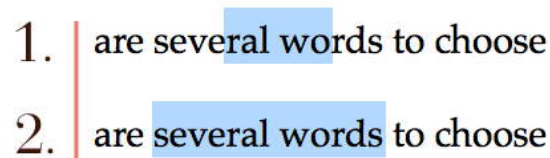
**Select All** ⌘A Selects all of the content of the current text, outliner, corkboard view and etc. This command works in every context where it is possible to select multiple items, from footnotes in the inspector sidebar to keywords to search results in the sidebar.

**Select** ▾ Contains several commands to aid in the selection of items and text. In addition to these commands, in views where things are listed and it is possible to select multiple items, such as the binder or a list of keywords, there are a few modifier keys that can be added to mouse clicks to form basic selections:



- **Command:** toggles whether or not one item beneath the mouse pointer is selected. This can be used to effectively deselect everything, if the one and only selection is clicked. It can also be used to add a second item to the selection, no matter how far away it may be from the originally selected item.
- **Shift:** Selects all of the items in between the point where you click, and the *last* item you clicked on as a selection action. This can include **Command** clicks from above, as well as normal clicking to select one item.

**Select Word** The next three commands will select the nearest word, sentence or paragraph that the cursor or current selection is found within, or when a selection exists, it will be expanded in both directions until reaching the requested unit of measurement. E.g. if a few letters of two words are selected, the Select Word command would expand the selection left to encompass the first word entirely, and rightward to encompass the second word entirely ([Figure A.1](#)).



**Figure A.1** Before and after usage of the Edit ▶ Select ▶ Select Word command.

**Select Sentence** Given the wide range of languages, writing styles and methods, right, wrong or just creative—grammatical constructs such as sentences can only be estimated.

**Select Sentence with Spaces** This alternative which will select one space from around the sentence (whichever is most logical), so that it can be more easily moved to a new position without clean-up.

**Select Paragraph** Selects the current paragraph, including the carriage return on the end of it, unless of course the paragraph is at the end of the file.

**Select Style Range** The current selection will be expanded to encompass the style range around it in a contiguous fashion. This works locally first, looking for character styles, and then expands to any paragraph styles that exist around the selection. If no styled text exists around the cursor or selection, then expansion will encompass the contiguous unstyled paragraphs around it.

For more documentation on this and the following two commands, refer to [Selecting and Searching for Styles \(subsection 17.4.1\)](#).

**Select All Style** Selects all non-contiguous text within the same text view using the current style beneath the cursor, or as found beneath the leftmost edge of the selected text. As with the previous command, character style ranges will take precedence over paragraph styles. Also as with the prior command, if the cursor or selection encompasses text with no style applied to it, the command will select all other unstyled text.

**Select Next in Same Style** Using the same criteria as “Select All Style”, this command will select the next phrase of text found within the current editor using the same style. If the cursor is within block quote, then the next block quote will be selected. This form of selection will wrap around from the bottom of the document back to the top if necessary, which means if only one example of the style exists, the very context the cursor currently sits in may be the “next” available example of text using this style.

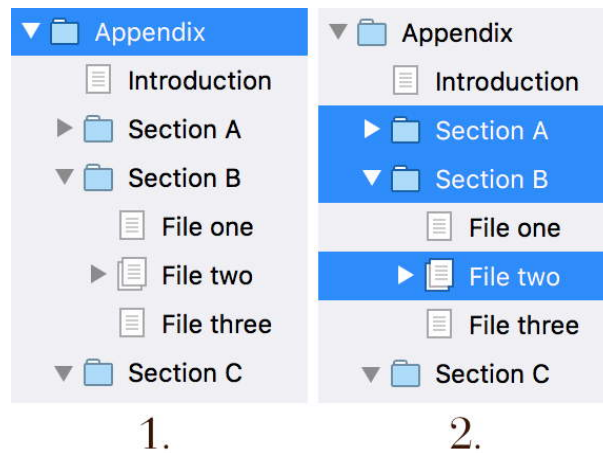
**Select Similar Formatting** Using the same criteria as “Select All Style”, this command checks for the type of formatting located beneath the cursor and then scans the document for similar examples, selecting all such non-contiguous text simultaneously. This command is handy for turning simple formatted text into styled text. Given the wide variety of possibilities that fall under “formatted text”, we cannot expect this command to function flawlessly in all cases.

If the cursor or selection falls upon text that is styled, then the outcome of this command is synonymous with **Edit ▶ Select ▶ Select All Style**.


**Select Annotation/Footnote** This command will alternate depending upon whether the cursor or leftmost selection edge is located within an inline annotation (of the same colour) or inline footnote. If so, the inline note will be fully selected. The command will be disabled if no such inline notation range can be found.


**Select Subgroups** Applicable only to the outliner and the binder when a container of any type is selected. This command will add any descendant container items that are currently visible *and* that contain subdocuments (an empty container like a folder is not considered a group of items). This command can come in handy when assembling corkboard stacks ([subsection 8.2.8](#)), which require a selection that consists purely of containers.

[Figure A.2](#) demonstrates a few different outcomes based on this rule. We can disregard anything that might be within the “Section A” folder since it is collapsed, “Section B” contains one container (“File two”) which becomes selected as well, and finally “Section C” is disregarded because it is an empty folder.



**Figure A.2** Before and after results of selecting the subgroups of the “Appendix” folder.

**Select Current Text**  **A** When the current context is a text editor instead of the binder or outliner, this command will appear in the menu. It can be used to select only the text in the section you are currently editing within a Scrivenings session, rather than the entire session.

**Select with Subdocuments**  **A** This command will become available when a container has been selected in either the binder or the outliner. Use it to select *all* descendent items of that container, opening any necessary levels of hierarchy downward in order to do so. This command is useful for cases where explicit selection is required, such as keywording, taking group snapshots, or assigning many items to a collection.

**Select ‘Included’ Subdocuments** As with the prior command, all subdocuments of the currently selected container (to all depths) will be selected, but in this case only if they have their respective “Include in Compile” checkbox enabled. Easily filter out all notes, old revisions and other nonessential items from your draft folder with this command.

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**Deselect All** If possible, removes all active selections from the current view. In some cases there will always be a default selection that cannot be removed. In a text editor, the cursor position takes on that role, and certain commands and tools will use the cursor position as a form of implied selection. In the corkboard and outliner views the underlying container that is being viewed will occupy the default selection, mainly for deciding what the Inspector will examine.

**Completions** ▶ These commands can aid in the entry of text, by offering to complete what you have typed in thus far in the current word.

**Complete  $\backslash$ Esc** Requests the auto-completion service for the text entered thus far. Can optionally be invoked with  $\mathbb{R}$ . or simply **Esc** by itself on some keyboard layouts. If you would prefer suggestions to be offered immediately and without invocation, switch **In script mode only** off, in the Corrections settings pane ([section B.6](#)).

**Complete Document Title  $\wedge$ Esc** With the first part of a document titled already typed, use this command to cause Scrivener to search your project for matching titles and suggest alternatives. This is useful in conjunction with the Corrections setting to automatically detect internal links typed in with `[[Document Title]]` wiki-style bracketing ([section 10.1.1](#)).

**Add Selection to Auto-Complete List** Adds the currently selected word or phrase to the project's auto-complete list. For more information, read Auto-Completion ([section 20.2](#)).

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**Move ▶** Movement commands are applicable to text as well as items. Items will move around within the current view, while text will either shift its paragraph position or have its overall indent level adjusted. Text list lines and table cells can also be moved up and down in this fashion. In all cases, text or item alike, movement will be done one step at a time.

When moving selected items in the various group views and lists, non-contiguous selections will maintain their original spatial distance from one another, and the whole selection will move together as a single unit *through* the other items around them. If any one component of the selection cannot be moved in the requested direction, the entire selection will refuse to move.

If it is your intention to *gather* items together into a container, no matter how far apart they started off, consider using the **Documents ▶ Move To ▶** submenu or simple drag-and-drop with the mouse.

**Move Up  $\wedge\mathbb{R}\uparrow$**  The item will be moved upwards in a spatial sense. The particulars of how this happens depends on the context:

- With **text** the selected lines will be transposed with the line directly above them.
- On the **corkboard**, the card will be moved directly up, advancing all cards between where it was and where it will be moved, to fill the gap it left behind.
- In both the **binder & outliner** views, the selected items will move up within the current list of “siblings”, or within a folder and without changing levels. They cannot be move “up” beyond the top of the group they are within.

- With **label view** the selected cards will advance up one label row, terminating at the top (by default “No Label”). If label view is in a vertical orientation, then moving a card *up* will change its binder order to be earlier in the section.

**Move Down**  $\text{^}\text{⌘}\text{↓}$  As with moving the selected items *up*, only in this case all movement will be done downward.

**Move Left**  $\text{^}\text{⌘}\text{←}$  The item will be moved upwards in a spatial sense. The particulars of how this happens depends on the context:

- **Text** will have its block indent level shifted outward by 0.25” increments. Any amount of first-line or hanging indent will be respected by this command. The levels of indent for all forms will be incremented equally, and once the left margin is reached by the leftmost portion of text, the command will be disabled.
- Items in the **binder & outliner** will be move out of their current container to become a sibling to it, inserted between the group they came from and the item that once fell directly below that group.
- On the **corkboard**, this command will move a card leftward, first along its row, and then wrapping around to the right edge of the row above, until reaching the position of the first card in the corkboard.
- With the **label view** the action is identical in that the card’s order will be moved earlier in the group. In vertical orientation label view left movement will change its label assignment.
- **Collections** do not allow left or right movement.

**Move Right**  $\text{^}\text{⌘}\text{→}$  As with moving the item *left*, only in this case all movement will be done in the opposite direction. In the case of **text**, the indent will be incremented 0.25” per usage and has no effective upper limit. The action of moving an item right in the **binder & outliner** will be to nest the selected items beneath the item directly preceding the topmost selected item.

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**Sort** ▶ Sorting can be done in the following cases: wherever there is a flat list of adjacent items that can be arranged in a view, when a single item is selected that is a container to other items or when more than one line of contiguous text has been selected in an editor. Possible applications include items in the binder, outliner or corkboard views, keywords, bookmarks and so forth.

**Sort Ascending (A-Z)** This command will sort eligible items in alphanumeric order (o–9a–z) with most punctuation and symbols falling before numbers.

**Sort Descending (Z-A)** Sorting by descending order follows all of the same rules, only sorts in (z–a9–o) order, with most punctuation and symbols falling at the end of the list.

**Collection into Binder Order** Only available when working with a standard Collection list within the binder sidebar or main editors. Returns the list to its original binder order in the project, permanently.

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**Append Selection to Document** ▶ This command presents a binder item selection submenu of everything capable of having text added to it. It requires an active text selection, which will be added to the end of chosen document selected through the submenu. This feature will keep track of its use within the project, tagging frequently used targets in a “Favorites” section at the top of the menu.

Use the “New...” command to create a new document containing the selected text. You will be asked where to place this new document in a subsequent dialogue.

**Append Selection To “X” Again** If the Append Selection command has been used within the current session, this convenience menu item will appear, to facilitate appending the current selection to the previously used target.

For links between internal project items, or between Scrivener projects, refer to Linking Documents Together ([section 10.1](#)). For general hyperlinks to files, web sites and so forth, refer to Hyperlinks ([subsection 15.7.3](#)).


**Add|Edit Link... ⌘K** Add an external hyperlink of any types to the text. If the cursor is not already placed within a link, you can use this command to insert a new link at the cursor position. Alternatively, when text is selected in the editor, the hyperlink will be applied to the text rather than inserting the URL directly into the editor. The URL editing dialogue will provide you with several common prefix options<sup>3</sup>, or optionally “no prefix: for custom protocols, like ftp: links.


If the cursor is currently placed inside of a link (including document links), this command will bring the editing dialogue up for that link, allowing you to change the URL, or select a different binder item to connect the link with.


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<sup>3</sup> For the sake of simplicity, both HTTP and secure HTTPS links are considered one and the same.

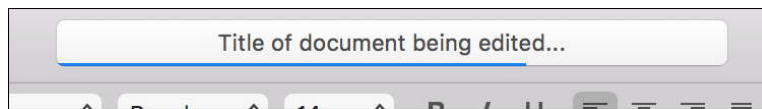
**Remove Link** If you select a range of text, all link formatting within that range will be removed. Links only partway selected will have the link removed from the selection, leaving other bits of the link around it untouched.

**Link to Document**  **L** Presents a binder item selection submenu for the creation of a hyperlink to a chosen document within the same project at the current cursor position, using the target's binder title, or if you have text already selected, it will be turned into a hyperlink.


Using this menu, you can also create a link to a document that doesn't exist yet, with the **New Link...** command ( **L**). You will be asked for the title of the new document, and where to place it. After providing this information, a link to this document will be inserted in the current editor.

**Find**  As a program designed for working with bulk text, Scrivener has many tools in its chest for searching, collecting items, and organising and reviewing the results. For full documentation on how to use Scrivener's extensive searching facilities, refer to Searching and Replacing ([chapter 11](#)).

**Quick Search**  **G** Provides a shortcut for using the toolbar's quick search field, which otherwise prints the name of the binder item you are currently viewing ([Figure A.3](#)).<sup>4</sup> Read more in Quick Search Tool ([section 11.5](#)).



**Figure A.3** The “Quick Search” tool displays the document title prior to being clicked on.

**Search in Project**  **F** Provides a shortcut for the project search tool, which will appear as a text pane above the binder sidebar. Type text into this field to search the project for matches, in accordance with the current search settings, set in the magnifying glass icon menu to the left of where you type. There is a lot to this tool! Read more about Project Search ([section 11.1](#)).

**Project Replace...** Shows the Project Replace panel, for the bulk replacement of text throughout the entire project or selected portions of it, even including the otherwise immutable snapshots. This operation cannot be undone; use with care. Read more about its usage in Project Replace ([section 11.3](#)).

<sup>4</sup> Or if the toolbar has been hidden, a pop-up search field will be opened.



**Find...** ⌘F Brings up a typical text find and replace tool. This panel works within nearly every context where you can edit text, even within the inspector sidebar. In the main editors this often means only one document at a time, but in the case of Scrivenings session it could mean many documents. Read more about Document Find and Replace ([section 11.2](#)).

**Filter...** ⌘F When the active view is a corkboard or outliner, the “Find” command will be replaced with the “Filter” command. This brings up a panel at the top of the view that can be used to filter which index cards or outliner rows you see, based on various criteria. Read more in Filter Outliner & Corkboard Views ([section 11.4](#)).

**Find Next/Previous** ⌘G & ⇧⌘G Jumps to the next or last matching text based on the criteria supplied in the Find panel. These can be used even while the find panel is closed.

**Use Selection for Find** ⌘E Sets the selected text as the current find term, copying it into the “Find” text field even if the find panel is closed. It can thus be combined with the previous commands to search for text without using any interface.

**Jump to Selection** ⌘J Scrolls the editor view so that your cursor position is centred on the page. Useful if you have used the scrollbar, PageUp/PageDown or the Home/End keys, to briefly check other areas of the text. When typewriter scrolling ([section 16.3](#)) is enabled this command will use the selected **Typewriter scroll line**, from the Editing settings pane, rather than the centre of the view.

**Find by Formatting...** ^⌘F Opens the Find by Formatting panel. This tool is quite powerful and has a wide range of options documented in Find by Formatting Tool ([section 11.6](#)).

**Find Next/Previous Formatting** ⇧^⌘G & ^⌘G As with **Find Next** and **Find Previous**, this command will jump from match to match, even without the “Find by Formatting” panel open.

Unlike standard Find, this command will by default seek matches from adjacent documents once the end of the current document is reached. In this way, you could step through the entire project looking for matching formatting.

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**Writing Tools** <macOS 15.1+> For supported regions and languages, provides access to Apple Intelligence (AI) features. Refer to Editing with Apple’s AI Tools ([subsection 20.3.5](#)) and [Apple’s documentation](#), for further information.

For these commands to be available, some amount of text must be selected.

**Spelling and Grammar ▶** Accesses the global macOS’ spelling and grammar tools, as well as Scrivener’s Linguistic Focus tools ([subsection 20.3.2](#)). These settings are stored on a per project basis, though their use will establish the settings used to set up the next project you create. Existing projects will always store whatever setting you left them at.

**Show Spelling and Grammar ⌘:** Opens an interactive spell checking window. This will be of most use if you prefer to spell check all at once. If you wish to change the base language the spelling and grammar checker uses, you can set that here.

**Check Document Now ⌘;** Start checking for misspellings from the current cursor position on downward. Once the bottom of the document is reached, it will wrap around to the top.

**Check Spelling While Typing ⌘\** Toggles the automatic red underlines that indicate unrecognised and misspelled words as you type.

**Check Grammar With Spelling** Toggles the automatic green underlines that indicate potential style or grammar errors as you type.

**Linguistic Focus...** Brings up a floating panel that provides access to several macOS linguistic word highlighting features ([subsection 20.3.2](#)).

.....

**Substitutions ▶** These options control whether or not typographic punctuation will replace easier to type basic punctuation as you write. These settings are stored per individual projects, and their defaults are established in the Corrections settings pane, under “Punctuation”.

**Smart Quotes** If necessary, basic speech marks will be substituted for typographic punctuation as you type. In English for example, the " character would be substituted with a matching pair of “curly” quotes. The quotation style used is typically set by your macOS region settings, or quote settings established in the System Settings: Keyboard pane, by clicking the Edit button alongside your input source.<sup>5</sup>

**Smart Dashes and Ellipses** A typed sequence of two or three hyphens will be substituted with an em-dash (—) character, and three full stops will be converted to an ellipses (...) character.

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<sup>5</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.

**Transformations** ▶ For the transformation of text from one form to another in a permanent fashion.<sup>6</sup>

**Make Uppercase** Converts the selected text to all uppercase characters.

**Make Lowercase** Converts the selected text to all lowercase characters.

**Capitalize** Useful for headings, this command capitalises each word within the selected range.

**Make Small Caps** Creates fake small caps by capitalising all of the letters in the selection and then using font sizes to produce the effect. If your workflow requires true small caps you should use the typography features of your font, or a dedicate font for doing so. This feature is not cross-platform compatible.

**Remove Small Caps** In opposition to the previous command, removes the faux caps effect, restoring the original letter case and normalising the font size based on the larger letter found within the selection. Given how this command requires precise expected measurements between large and small letters, it will only work on text that has not had its overall font size modified after applying faux small caps.

**Quotes to Smart/Straight Quotes** Converts between typographic “curly” quotes and straight speech marks and vice versa.

**Inline to Inspector and Inspector to Inline Conversions**

These four commands allow you to convert inline annotations to linked Inspector comments, vice versa, and footnotes. These commands work on the current editing session as a whole or the current selection if applicable.

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**Speech** ▶ Access to macOS’ text-to-speech synthesis is provided through two menu controls for starting and stopping speech. The active text editor will be used as source text with these commands starting with the cursor and reading downward, or if text is selected, only the selection will be read aloud.

Settings pertaining to this feature, such as which voice to use and how rapidly it should speak, are found in the System Settings: Accessibility: Spoken Content pane.

**Text Tidying** ▶ A few useful tools for cleaning up text and fixing links.<sup>7</sup>

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<sup>6</sup> Unless otherwise noted, these commands will modify the entire editor session unless a selection is made, and then only the contents of the selection will be modified.

<sup>7</sup> Unless otherwise noted, these commands will modify the entire editor session unless a selection is made, and then only the contents of the selection will be modified.

**Delete Struck-Through Text** Within a selected range, any text marked with the **Format ▶ Font ▶ Strikethrough** command will be deleted. Struck-through text can also be filtered out of compiled text as an option, without removing the original text in the editor, making this command only necessary if you desire to clean up the original.

**Update Document Links to Use Target Titles** When using links to generate cross-references in the output, this command can be used to fix the visible text of any document links found within the selected text, updating them to match the names of the documents that they each point to respectively. Broken links (those pointing to documents that no longer exist) will be automatically cleaned up and removed, by this command, leaving the text they were attached to unchanged. This command is also available from the text editor contextual menu.

Read more about keeping cross-references accurate, in Updating Link Text Automatically ([section 10.1.2](#)).

**Renumber Paragraphs** Scans the selected text (or all text in the view) for numbered paragraphs, and rennumbers them starting from 1, at the top. This command will not renumber lists, if you need to repair a broken list numbering sequence, right-click in the list and select “Re-number List”.

**Replace Multiple Spaces with Single Spaces** Useful for cleaning up a document that has been typed up with multiple spaces in between sentences and so forth.

**Remove Empty Lines Between Paragraphs** Deletes empty lines, such as those often found in emails or plain-text documents.

**Remove Page Breaks** Like hyphen hinting, page breaks are used as a typesetting tool in single-document word processors to force page flow in places where natural or soft page breaking produces undesirable results.<sup>8</sup> Texts imported into Scrivener will rarely benefit from these as the page flow will undoubtedly change, and this command can help strip them out in a bulk fashion.

**Strip Leading Tabs** If the original document was typed in the fashion one might do when using a typewriter, with tabs in front of every paragraph, this command can be used to strip them all out.

**Zap Gremlins** Strips Unicode and ASCII control characters from the text. If you are having difficulties compiling, or have found areas in your text

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<sup>8</sup> They may also be used as a “sloppy” stand-in for stylesheet driven page flow, governing such notions as a chapter heading break, but these uses are not beneficial to how Scrivener works, either.

where the cursor seems to get “stuck” when moving through ranges of text, your text may have acquired these invisible control characters from somewhere. This command will safely strip out all of the Unicode characters falling within the range of #x00 to #x1F, except for the necessary #x09, #x0A, #x0C and #x0D characters, which are used to print spaces, line returns, page breaks and tabs in your text.

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**Reference Tools ▶** Provides access to few macOS language tools, as well as some common search utilities.

**Look Up in Dictionary and Thesaurus** Sends the currently selected word, or the word that the cursor is currently located within, to Apple’s Dictionary application. You can also use **⌘D** to do quick spot-checks, or use a “force click” action on compatible hardware.

**Search/Look Up in...** Uses the currently selected text or active word to search the selected resource for results. Your default browser will be used to display the result page and, will require an active Internet connection to make use of.

**Name Generator...** A tool which will generate names based on a wide variety of criteria. Read more in The Name Generator ([section 20.4](#)).

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**Start Dictation... ⌘fn** For computers capable of recording audio and making use of the macOS speech-to-text dictation system, this can be used to speak words aloud and have them turned into editable text in the current editor. Settings pertaining to this feature are found in the System Settings: Keyboard pane, under the “Dictation” subsection.<sup>9</sup>

**Emoji & Symbols ⌘Space** Loads the macOS Unicode character browser. Use this to insert characters and symbols that are not found on your keyboard.

## A.5 Insert Menu

The Insert menu is concerned with the addition of images, equations, tables, notation, special characters and placeholders into a valid text editor or field. Some general rules of thumb can be applied for how inserted items will be placed within the text:

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<sup>9</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.

- The cursor position or text selection will be used to place the selected element from this menu.
- Commands that place objects or text snippets, such as images, lines or breaks, will replace the selected text with that object.
- Those that modify formatting, such as the inline annotation feature, work just like ordinary formatting commands like bold and italic do. Selected text will have that formatting toggled, but otherwise the command modifies how we type in new text.
- For commands, like inspector comments that attach objects *to* text, the active selection will be adorned. When no selection is provided, the behaviour will be to use the nearest available word.
- Some commands insert invisible flow control characters, such as a non-breaking space, or whitespace characters as they are sometimes referred to. They will be inserted at the cursor, or replace the selected text.

**Table** Inserts a starter table (3 columns by 2 rows) into your document at the cursor position unless the cursor is already within a table. In both cases the command will also open a floating configuration palette containing tools for adding and manipulating tabular data in the text editor. With a preexisting text selection, the selected text will be placed within the first and leftmost cell.

For further table manipulation commands, use the **Format ▶ Table ▶** submenu, or right-click within an existing table.


**Image From File...** This brings up a file dialogue for selecting an image from your computer to be inserted and stored within the current text document. Images can also be dragged into the editor from nearly any source capable of dragging images, such as Scrivener's binder itself, the Finder and many Web browsers. Read Working with Images ([section 15.6](#)) for more information on working with images in your text.


**Image Linked to File...** As with the above, only the inserted image file will be *linked* to the original file on your hard disk, rather than storing it as a new copy in the text document. This allows you to keep image files easily accessible to other tools as well as keeping the file size of your project trim. Refer to Linked Images ([subsection 15.6.4](#)) for further information.


**Image Linked to Document ▶** This submenu presents a list of all images found within the current project. As with the above command, the image will be inserted into the editor as a link to the original image, only in this case to a file within your project binder, rather than to an external location on your disk.


It is also possible to adjust Scrivener's settings so that any images dragged from within Scrivener into an editor will be linked, rather than embedded:


with the **Link to images dragged from binder into editor** option, in the “Dragging & Dropping” Behaviors tab. This may prove more convenient in projects with many images.


**Comment**  \* Opens a new comment attached to the selected text (or nearest word), which can be written to in either a popup box or the inspector, depending upon your preference. For more information on annotating your text, see Annotations and Footnotes ([chapter 18](#)).


**Inline Annotation**  **A** Converts the selected text into an inline annotation, or toggles the writing mode to annotation mode. Like using a proverbial red pen, these are useful for placing notes right in the editor, alongside the relevant text.

**Footnote**  **8** This feature is functionally identical to attaching a Comment to the text, although for the purposes of eventually exporting the content of the note to the reader in the form of an end-of-page footnote or endnote of some variety. How this will be done depends upon your compile settings and the type of work being produced.

**Inline Footnote**  **F** Working similarly to inline annotations, this command converts the selected text into a footnote, or toggles the writing mode to footnote mode. Useful for keeping footnote content directly alongside related text.

**Bibliography/Citations...**  **Y** If a bibliography manager has been set up in the General: Citations settings pane, this command will launch and bring the chosen utility to the foreground, facilitating the process of selecting a citation and pasting it back into Scrivener using whatever system that application provides.


**MathType Equation**  **<macOS 10.13 – 14>** Create a MathType image equation at the current cursor location. When inserting an equation inline, it will attempt to match the baseline of the current text. If MathType is not properly installed, a window with a link to the download will be provided. See also: Using Equations with MathType ([section 20.6](#)).

**Break**  Invisible characters, or whitespace characters, that can be inserted into the text to control the flow of it. The **View ▶ Text Editing ▶ Show Invisibles** command will cause most them to be visible in the editor as special symbols ([Table A.2](#))

**Line Break**  **Return** Inserts a soft-break instead of a full paragraph break. Use this when you need to create a list within a single paragraph.

**Page Break** Inserts a page break within the current text. Page breaks can be previewed with the **View ▶ Text Editing ▶ Show Page View** mode. In most cases, Scrivener’s compile system will insert page breaks for you, relegating use of inserting them manually to niche cases.



**Non-Breaking Space**  **Space** Inserts a special space character which will prohibit word-wrap from dividing the words joining that space. I.e. for the purposes of word-wrap, it will consider a sequence of words separated with non-breaking spaces as a single word.

**Word Joiner** Inserts an invisible Unicode character which has zero-width, but otherwise acts just as a non-breaking space, ensuring the two characters to the left and right of it are never broken between lines by word wrap.

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**Horizontal Line** ▶ Provides a few rule lines that can be inserted at the cursor position, replacing any selected text.

**Centered Line** Inserts a sequence of 100 underscored non-breaking spaces with centre-alignment formatting applied to the line. You can increase or decrease the size of the line by adding or deleting non-breaking spaces.

**Page-Spanning Line** Uses an underlined tab stop, set to the width of the page as it will be compiled, to draw a line across the page. Given how Scrivener's text editor may not depict the width of the page in terms with how it will compile, the tab stop may in some cases fall before or after the editor width or simulated text block in Page View, causing the rendering of the line to collapse and become invisible.

It is also important to note that since this uses a tab stop with a fixed measurement, if the paper size for the project is changed at a later date, these kinds of lines will break until their tab stops are fixed or they are regenerated with the menu command under the new paper settings.

**Signature Line** Inserts a sequence of 40 underscored non-breaking spaces with left-alignment formatting applied to the line. As with centred lines, you can adjust the width by adding or removing non-breaking spaces to the line.

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**Auto-number** ▶ Inserts the selected placeholder that will be used to generate numerical sequences in the chosen format when compiling. A sequence such as <\$n><\$n><\$n> will print as 123. For full documentation on how to use the various placeholders, use the **Help ▶ List of All Placeholders...** menu command.

**Draft Word Count** ▶ Inserts a placeholder that indicates the word count for the entire document as compiled<sup>10</sup>. There are a number of rounding options

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<sup>10</sup> The particulars for what constitutes the "entire document" are defined by the compile format. Some may include footnotes or front matter in their counts where others may not.

available, for cases where precise counts are less important.

**Draft Character Count** ▶ As with “Draft Word Count”, this command inserts a token for the total character count with various rounding options available.

**Endnote Marker** For supported formats (print/PDF/RTFD/TXT/HTML), this special placeholder will collect all of the endnotes in a project and place them at the location of the marker during compile. This will be especially useful for some academic formats, which do not place endnotes at the very end of the text. If you are using inline and inspector notation to compile both footnotes and endnotes simultaneously, this marker will not impact footnotes.

**Current Date & Time** ⌘⌘⌘⌘⌘ Inserts a plain-text date stamp based on your system’s Long Date and Short Time format.

**Media Time Stamp** Inserts the current time stamp from the active media player in the opposing split. This can be done while playback is in operation, or while paused. The format for the time stamp can be modified in the Behaviour: Playback settings pane ([subsection B.4.8](#)), under **Media Time Stamp format**.

## A.6 View Menu

The View menu contains commands related to changing the way documents are viewed, allowing you to show and hide various elements, navigate between views and customise the way information in the current project is displayed. A rule of thumb is, if you want to change the way something in your project looks or acts, and it’s not found in project settings ([Appendix C](#)) nor in the main Settings, chances are it is in the View menu.

As with project settings, the options you select here will only impact the active project. If you find you prefer a particular setting in general, you might want to look into creating a starter template for yourself ([section 5.4](#)).

### View Modes

The three view mode selections at the top of this menu are different ways in which to view the contents of the editor. Setting a view mode determines how the active editor will view groups of items (such as when clicking on a folder or selecting two or more items) going forward, until you change view modes again. Within the menu, a checkmark will be placed beside the view mode currently in use.

When selecting a container and switching to corkboard or outline mode, the child items of that container will be displayed in the view. If regular item is se-

lected when switching to one of these modes, an empty view will be displayed so you can easily add new child items beneath it (turning it into a file group).

These actions only pertain to the main editors (not Quick Reference panels or Copyholders, which only view the document content) and is a separate setting per split. You can thus keep one split in Scrivenings mode and the other in Corkboard if you wish. For an overview of how view modes work, see View Modes ([section 4.2](#)).

**Document/Scrivenings** ⌘1 If multiple text documents are selected in the editor, this choice displays the current editor as a Scrivenings session ([section 15.5](#)), showing the text of each document one after the other, viewable and editable as if they were a single file. Any media or research files included in the selection will be skipped over.

When a single non-group item has been selected in the editor this menu item will be labeled “Document”, and switch the content to its text or media view.

**Corkboard** ⌘2 Display the current editor as a corkboard ([section 8.2](#)).

**Outline** ⌘3 Display the current editor as an outline ([section 8.3](#)).

**Show|Hide Binder** ⌘B Toggles whether or not the binder sidebar ([subsection 4.1.3](#)) is visible on the left of the main window. You can hide the binder to concentrate on editing or composing the current document if you so wish.


**Show|Hide Collections** Reveals or hides the collection tab list, which will appear above the binder sidebar, opening it if necessary.

**Show|Hide Inspector** ⌘I Toggles whether or not the inspector is visible on the right of the main window. The inspector displays all metadata for the current document, including synopsis and notes, and is hidden by default. Read more about this sidebar ([chapter 13](#)).

**Editor Layout** ▶ These commands impact the overall layout of the editor space, between the binder and inspector sidebars. Splitting the editor to show more than one thing at a time, as well as attaching “copyholders” to clip files to the editor splits and cleaning up the editor to provide a distraction-free interface are all located here. For what goes on *inside* the text editor specifically, you might be more interested in the following **View ▶ Text Editing** ▶ submenu.

**Show|Hide Header & Footer View** Toggles the visibility of the header and footer bar in the active editor.

**No Split** ⌘' Removes the current inactive split from the editor. For more information on using splits, see Splitting the Editor ([subsection 8.1.4](#)). This command does not remove copyholders directly.

**Split Horizontally**  = Initiates a new horizontal split, or converts the split orientation to horizontal. When creating a new split, the current content will be loaded into that split. If the editor is already split horizontally, then use of this command is synonymous with “No Split”.

**Split Vertically**  As with splitting horizontally, only vertically instead.







**Swap Editors** Only available when Split Horizontally or Split Vertically is enabled. This command swaps the editors from one side to the other, so that the view on the top/left will become the view on the bottom/right and vice versa. This swaps the entire editor session, its history, settings and so forth. What was the left editor will now be functioning on the right side instead.

If you would instead prefer to merely mirror the *content* into the other editor without swapping settings, use the “Match Split Documents” command in the header bar contextual menu ([section 8.1.1](#)).

**Copyholder Position** ▶ Also accessible by right-clicking on the copyholder’s header bar directly, you can set which side of the editor it favours using the options in this submenu. A copyholder cannot be positioned parallel with a split, so some options may not always be available, or be swapped for you when the split configuration changes.

**Close Copyholder**  - Closes the Copyholder view attached to the active editor split, falling back to closing from the inactive split, if necessary.

**Table A.2** Supported Invisible Characters with Symbolic Depictions

Invisible Character	Symbol
Space	
Carriage Return	
Line Feed	
Tab	
Non-breaking Space	
Page Break	
Word-Joiner	(Not depicted.)

**Text Editing** ▶ Formatting tools for working with text can be toggled in this submenu, as well as visualisation tools like page view, line numbers, vertical writing mode and so forth.

**Show|Hide Format Bar** ⌘⌘R Toggles the visibility of the character and paragraph formatting bar, which provides quick access to many of the most common types of formatting tools. Refer to The Format Bar ([subsection 15.7.2](#)) for more information on this tool.

**Show|Hide Ruler** ⌘R Toggles the visibility of the tab-stop and indent ruler ([subsection 15.7.1](#)) for the active editor.

**Show Titles in Scrivenings** When enabled, editable titles of documents will be placed between documents in a scrivenings session above their associated texts. Titles can be formatted, and the divider style changed, in the Appearance: Scrivenings settings pane ([subsection B.5.13](#)).

**Only Show Scrivenings Titles for Folders** Titles added by the above toggle will only appear on folders, while all other items will use a regular divider.<sup>11</sup>

**Show|Hide Invisibles** Toggles visibility of hidden control characters, such as paragraph breaks, table cells (when otherwise set to have no borders) tabs, spaces and page breaks ([Table A.2](#)). You can modify the colour used to depict these symbols in the Appearance: Textual Marks ([subsection B.5.16](#)) pane.

**Show|Hide Markup** Toggles the display of textual markings, to produce a cleaner copy suitable for proofreading. The markings that will be hidden by default are hyperlinks and highlight boxes behind comments, styles and Preserve Formatting. You can adjust which markings are hidden in the Appearance: Textual Marks settings pane ([subsection B.5.16](#)).

**Show|Hide Page View** ⌘⌘P Toggles displaying the text editor as a virtual page on and off, rather than text in a long column. It is not intended to be used as a layout mechanism, though it can provide a reasonable estimate of how your pages will look under certain conditions, once printed. This setting is specific to each split editor, as well as composition mode. Read more in Page View ([section 16.2](#)).

**Two Pages Across** When enabled, displays two pages side by side in a familiar book-style arrangement.

**Use Vertical Layout** This is a global setting that toggles the rotation of the main editors (including composition mode) to vertical alignment, as is sometimes used in Eastern scripts like Japanese.

**Show Line Numbers** Adds a paragraph (soft and hard line breaks within a paragraph will not be counted) numbering feature to the standard editor.

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<sup>11</sup> This behaviour is expanded to include all containers when **Treat all documents with subdocuments as folders** is set to true, in the Behaviors: Folders & Files settings pane ([subsection B.4.5](#)).

**Only Count Every Fifth Line** This secondary setting will cause every fifth line to be numbered, though each line will still be counted. Thus the second visible number will be “5”, then “10” and so on.

### **Show|Hide Compiled Footnote Numbers in Inspector**

When enabled, after you compile and all footnotes have been counted, their numbering will be printed in the Inspector alongside the footnote itself ([section 18.3.7](#)). This option can slow down compile, and is thus off by default.

**Prompt Before Updating Footnote Numbers** With numbering enabled the compiler will always ask if they should be updated. This can be of use if proofing copies have been sent out, and you do not want an intermediate compile to change the reference numbering your proofers will be using in their notes.

**Focus ▶** Provides access to settings for controlling focus mode. From here you can set the scope of how much content should be focused, or switch the feature off entirely for the current view. Refer to Focus Mode ([section 16.4](#)) for more information on how this feature works.

**Typewriter Scrolling ^⌘T** Toggles a feature that keeps the currently edited line of text at a set position on the screen, much like typing on a physical typewriter. This setting is specific to each split editor, as well as to composition mode (the latter has the feature enabled by default).

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**PDF Display ▶** This submenu controls how PDFs are displayed in the editor. Most of these options should be familiar as they are common to many PDF viewers.

**Automatically Resize** Keeps the PDF sized to the width of the editor window even when changed.

**Actual Size** Zooms the PDF to its native scale.

**Size to Fit** Like “Automatically Resize”, but only resizes the document once. If you change the size of the editor view later, it will stay at the same zoom level.

**Single|Facing Pages** In Single Page mode, will show one page per row like an ordinary digital file. In facing mode, two pages will be placed side-by-side in a column, more like reading a book.

**Continuous /Page Breaks** These two scrolling modes affect how the document is handled when using the scroll wheel, arrow keys, or page up and down keys. In Continuous mode, the pages flow by seamlessly; in page



break mode, only one (or two, if facing pages is enabled) pages will be showed at a time, and scrolling actions flip between pages.

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**Corkboard Options** ▶ Provides features and visual options for the corkboard ([section 8.2](#)). Most of the settings in this menu are specific to each split, affording different view settings for each editor. Additional options are available via the corkboard display options button, which is located on the right-hand side of the footer bar for each corkboard.

**Cards Across** ▶ The Cards Across submenu allows you to define how many index cards you would like to appear in each row of the corkboard. Auto-fit will calculate how many cards to show, based on the size of the editor and the size of the cards; similar to how word wrap works.

**Arrange by Label** Toggles a mode whereby index cards are arranged by label on the corkboard ([subsection 8.2.5](#)). Each label forms a “rail” that matching cards are placed upon in the order they appear within the corkboard naturally. The menu title will adjust depending on your Project Settings ([section C.3](#)) for how you refer to labels generally. Whether these rails form rows or columns can be adjusted with the following menu options.

**Arrange by Label Layout** ▶ These choices select between the rotation of the corkboard layout or whether it wraps cards to the view, as described in Stacked Corkboards ([subsection 8.2.8](#)). Grid orientation (or how the corkboard behaves by default) is only available when stacking, never when Arrange by Label is enabled for the stacked view. These options are also available as buttons along the bottom right in the corkboard footer bar, and on the Touch Bar with appropriate hardware.

The name of this menu will change depending upon the context. By default it will use the above title (or whatever you refer to as “label” in the project settings), but if the corkboard is displaying multiple containers in a “stack”, then the command will read “Stacked Groups Layout”.

**Show|Hide Label Colors Along Edges** ^⌘P A coloured strip, drawn down the edge of index cards, will indicate the label colour assigned to it. When no label has been assigned to a card no strip will be drawn on it.

**Show|Hide Status Stamps** ^⌘S Toggles whether stamps are displayed on index cards. Stamps show the current status associated with the document represented by the index card as though it has been stamped on the index card. The appearance of stamps can be adjusted in the “Fonts” and “Colors” tabs of the Appearance: Corkboard settings pane ([subsection B.5.4](#)).

**Show|Hide Keyword Colors** ^⌘K Keywords assigned to a document can be visually indicated along the right-hand side of the index card as colour



chips. The number of keywords that can be shown at once can be changed using the corkboard display options button.

**Show Card Numbers** Cards will be numbered according to their sequence in the selection or container they are within. In Freeform mode the numbers will not change according to where the card is positioned in the view. This can be a valuable reference as the order of cards are likely to become shuffled up. This option impacts both splits.

**Number Per Section** When this option is enabled, if the corkboard is displaying multiple containers in a “stack”, card numbering will be restarted for each new section. When disabled card numbering will be linear across sections.

**Show Blank Cards as Ghosts** Any cards that lack a title, synopsis *and* main text content (i.e. would appear as a completely empty index card) will be hidden from the corkboard, leaving a blank space behind. The card will still be present, and the empty area can be double-clicked on to edit the card.

**Freeform** Activates Freeform Corkboard mode ([subsection 8.2.4](#)), allowing unrestricted movement of cards around on the corkboard without any immediate impact on their underlying order in the binder. This can also be toggled in the footer bar, and on the Touch Bar with appropriate hardware.

**Snap to Grid** Toggles whether or not cards in freeform mode will snap to a background grid, rather than allowing for pure freeform placement.

**Commit Freeform Order** Uses the current freeform layout to reorder the actual manuscript outline structure. Scrivener will provide several options for how this can be done in a dialogue box ([section 8.2.4](#)). If card numbers are enabled, they will be renumbered at this time to reflect the new underlying order. This command can also be invoked via the **Commit** button in the corkboard footer bar.

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**Outliner Options** ▶ Displays a list of toggle commands that reveal or hide the corresponding columns in the active Outliner view ([subsection 8.3.3](#)). These settings are stored per split, affording different view settings for each editor. You can also manage columns using the ▶ button above the scrollbar area in the outliner itself.

**Center Content** Toggles whether the current outliner view will have its content horizontally centred (much like the text editor centres the text column by default). This will be more useful with a limited number of

columns, and will have no visible effect if the outliner is wider than the editor. This behaviour can also be toggled via a button in the outliner footer bar ([subsection 8.3.9](#)).

**Use Fixed Row Height** Toggles whether or not the current outliner view will use a fixed height cell for each row, rather than an adaptive height that conforms to the amount of content in various columns. For more information, refer to Using a Fixed Row Height ([subsection 8.3.8](#)).

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**Use Label Colour In** ▶ An item's label colour can be applied as a tint to various interface elements throughout the project window, toggled by the choices in this menu, listed below. The intensity of most background tinting can be adjusted in the Appearance: General Interface settings pane ([subsection B.5.1](#)). Read about the different options available in this menu in Labels & Status ([subsection 10.4.3](#)).

**Show as Background Color in Binder** This option will highlight the title the label colour, rather than drawing a dot to the right of the name. This option has no impact on the other sidebar views.

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**Zoom** ▶ This all purpose tool zooms the display of a compatible view in or out, and also allows for precise selection for text view types. Each split records its own setting, as well as composition mode. The menu adds shortcuts and extends access to this capability into areas that lack a visible zoom control, such as Quick Reference panels and inspector panels with text. Refer to Scaling Text ([subsection 15.3.1](#)) for more information.

The tool will also increase or decrease the size of viewed media, such as PDF or images.

**Zoom In** ⌘> Increases the magnification of the active view by a set amount. In text views this amount correlates with the provided percentage values in this menu.

**Zoom Out** ⌘< Decreases the magnification of the current view, using the same rules as zooming in.

**Zoom by percentage** The middle portion of the menu lists a number of convenient and popular zoom percentages.

**Fit Width** Adjusts the magnification so that the page width (including margins) fits the current editor width. This and the following option are available when using Page View mode in the text editor ([section 16.2](#)), or when viewing PDF files.

**Fit Page** Sets the magnification so that both the short and long edge of the page can be seen within the editor.

**Other...** Provides a field where you can type in a precise magnification amount yourself. If you'd prefer a number between 200% and 300% say, this would give you the option for doing so.

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**Outline ▶** This submenu provides commands for working with groups in both the outliner and binder, followed by settings and navigation commands for the binder.

**Expand All ⌘9** Expands all collapsed items recursively within the current view. When this command is used in the binder, it will expand the entire binder. If you instead wish to only expand or collapse one single section of the outline, you can use the **Option** key in conjunction with a mouse click or the ← (to collapse) or → (to expand).

This command can also be used in the Footnotes & Comments inspector pane to expand all collapsed notes to full height.

**Collapse All ⌘0** As with Expand All, this works the other way, closing all visible open items recursively.

This command can also be used in the Footnotes & Comments inspector pane to collapse all notes to single lines.


**Collapse All to Current Level ^⌘0** Working in a similar fashion to Collapse All, this command will collapse the entire outline below the currently selected item's level. Thus if you have an outline that has six levels of depth, and select a folder on level 3, using this command will completely collapse all items except those at levels one, two and three, which will remain as they were.

When multiple items are selected, the least indented item in the selection will be used to determine the level by which the tree will be collapsed.



**Show Subdocument Counts in Binder** Each container in the binder will display a number to the right of it showing how many subdocuments it contains. This number is a sum, meaning that it will not only count the container's immediate children but all descendants beneath those children (and their children's children, to get biblical) as well.

**Hoist Binder** Focus the binder sidebar on the selected container, and all of its descendent items. While hoisted, or focused in this way, all changes made to ordering and structure within that area will be made to the full binder outline itself. This is merely a way of viewing only one part of the



binder at a time.<sup>12</sup> Read more about it in Hoisting the Binder Hoisting the Binder ([section 6.3.5](#)).



Use this command again to return the binder to full display. You can also click the  button in the binder sidebar header bar.

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**Enter|Exit Full Screen**   **F** Utilises macOS' full screen implementation, expanding the main project window to occupy the entire screen, and moving it to its own virtual desktop (or "Space" as Apple refers to them), segregated from the rest of the applications running on your system. The window cannot be resized or moved until **Exit Full Screen** has been invoked.

Exiting Full Screen mode will return the project window to the original position and size (and when using a default full screen layout ([subsection 12.3.4](#)), to its original layout as well) in use before moving the project window to full screen mode. Read more about it in Full Screen Mode ([section 4.1.6](#)).

**Enter|Exit Composition Mode**   **F** Toggles the distraction-free writing environment ([section 16.1](#)). Being strictly for text, this option is not available to research files or the corkboard and outliner group view modes (it will switch to text editing in the latter two cases, which may result in an empty editor if the container you were viewing is empty of text). There are three methods of invocation:

1. In the simplest case, if you are editing a single document or have one file selected in any context, it will be loaded in composition mode.
2. If the editor is displaying a Scrivenings session, the entire session will be opened in composition mode.
3. If multiple documents are selected in any context they will be loaded into the composition mode's history, so you can flip through them using the keyboard shortcuts,  **[and .**

**Show|Hide Tab Bar** Toggles the visibility of Apple's Tab Bar interface, which allows for the merging of similar windows together into a single tabbed window. In Scrivener, this means you can combine projects into a single window, and Quick Reference panels together into their own groupings. The **Window ▶ Merge All Windows** command is used to combine two or more alike windows together. For further information on how to use this feature, consult Apple's documentation.

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<sup>12</sup> For a non-destructive way of working with a portion of the binder, where moving items around can be done experimentally or for some workflow purpose, refer to Using Collections ([section 10.2](#)).

**Show|Hide Toolbar** Toggles the visibility of the main application toolbar.



**Customize Toolbar...** Opens the configuration panel for the main application toolbar. This can also be done by right clicking on the toolbar itself.

**Customize Touch Bar...** Brings up the standard interface for customising keyboard buttons on Apple's Touch Bar technology. As with most software, you will need to activate the area of the interface first in order to customise the button set that is available to it. For example to adjust which buttons are available in the binder, click in the binder first. Read more about touch bar ([subsection 4.4.2](#)).

This command will not be visible without the proper hardware.

## A.7 Navigate Menu

The Navigate menu focusses on all aspects of getting around inside of a project, from flipping between available binder sidebar tabs, to jumping from one place to the next in the editors, controlling media playback to moving your cursor around within the project window itself without the mouse. It also contains a few project settings that impact how navigation works with the split editors and copyholders.

**Reveal in Binder**  Displays the location of the currently edited file in the binder, opening the sidebar and switching to the binder if necessary (you can also use the  shortcut). It will also expand any containers to reveal the position of the item if it is nested. When used from the icon header bar menu with a multiple selection, all of the entries included in the selection will be highlighted in the binder.

This is most useful when the method you used to arrive at the current document did not involve clicking in the binder (such as using the history navigation buttons or using a link), or if you are currently viewing a collection and wish to find where the file is actually located in your project outline. This command is also available from the binder contextual menu.

This command is available in a few different contexts, and is also available from the header bar contextual menu ([section 8.1.1](#)):

- Editors
- Copyholders
- Quick Reference panels
- Binder sidebar views like Search Results, collections and hoisted containers.

**Reveal Draft Folder** Opens the binder sidebar if necessary, switching the main binder view out of any collections, search results or hoisted containers, and selects the Draft folder. This can be useful if the Draft folder has been renamed, and you are uncertain as to which of the folders in the binder will be used by the compiler.

**Go To ▶** The resulting action of this command will be similar to clicking on an item in the binder: the active editor will *go to* the item you specify. If the binder is hidden, a collection is selected, or a section is hoisted, for instance, you can use this menu to navigate to other areas of the project without having to alter your work environment.

Beyond the navigation commands documented below, the remainder of this menu will give priority placement to any project bookmarks that are defined, followed by a binder item selection submenu. This portion of the menu can also be accessed from the header bar icon menu and from within composition mode using the control strip along the bottom of the screen.

**Previous Document** ⌘↑ Jumps to the previous item in the binder sidebar list. When used with the main binder view visible, this command ignores hierarchy.

**Next Document** ⌘↓ As with Previous Document, but selects the next document in the binder sidebar list.

**Enclosing Group** ⌘R Will display the currently viewed item in context with its siblings using the current view mode, and can be thought of as a way of moving your editor “up” in the hierarchy one step at a time. In most cases, this will select the immediate parent of the document, selecting the document’s index card or outliner row that you came from, or expand your current Scrivenings session to include the siblings and parent of the current text item.

**Selection** ⌘4 Causes the active editor to jump directly to the text/content component of any selected item, disregarding all rules for how that item would normally be opened. When more than one item is selected, they will be loaded using Scrivenings mode as a multiple selection. When used within a Scrivenings session the effect will be to “isolate” the currently edited chunk of text and edit it alone.

The main difference between this and the **Navigate ▶ Open ▶** commands (⌘○ or ⌘○) is that those will respect the current view mode preference (so if you select a folder card in a corkboard and use an “open” command the result will be to load that folder as a corkboard). ⌘4 will *always* load the selected item’s content (text or media)—without changing your current view mode. Another distinguishing characteristic is that use of this command will ignore any navigation rules supplied to the binder or splits.

The content will always load in the *active* editor, even if clicking on items in the binder would ordinarily load them in the other editor.

**Collection ▶** This submenu contains a list of all available collections in the project. Rather than loading the collection in the sidebar, as would ordinarily be done, this command loads the contents of the collection into the editor, where it can be worked with using any of the group view modes.

If the collection is already being displayed in the sidebar, you can also load it into the editor by clicking on the ↗ button in the sidebar header (beside the ✕ button). Read more about this capability in Viewing the Contents of a Collection in the Editor ([section 10.2.1](#)).

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**Open Quick Reference ▶** This provides a similar list of project bookmarks and binder items as the **Navigate ▶ Go To ▶** submenu, except that the selected item will be opened in a Quick Reference panel, rather than replacing the contents of the editor.

**Collections ▶** Provides commands for navigating to collections in the binder sidebar, as well as one conversion command. This menu will be populated by a list of the collections in this project, in reverse order from how they appear in the tab list. It will always include an entry for the “Binder” and “Search Results”. Selecting an entry will switch the sidebar to viewing that collection, making this menu useful when the collection tab list ([subsection 10.2.1](#)) is not visible, or for assigning keyboard shortcuts to oft-used collections.

For documentation on how to use collections, see Using Collections ([section 10.2](#)).

**Convert to Standard Collection** When a Search Result Collection is the active tab, this command will “freeze” the results and turn it into a regular collection that is no longer dynamically updated. This is a one-way process that cannot be undone, and the original stored search settings will be discarded. Refer to Converting a Saved Search to a Standard Collection ([section 10.2.4](#)).

**Next Collection** Select the next collection tab in the stack, as shown in the tab list (even if it is hidden).


**Previous Collection** As above, only selecting the previous collection.

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**Open ▶** The Open submenu provides a number of ways to open a selected item. These menu items are relevant from the binder or collection views, as well



as within the corkboard and outliner views, but note that in most cases, a single click in the sidebar or double-click on the icon in the editor, will open a file more directly. This command is also available from the binder contextual menu.

**In Current Editor**  The actual labels of this and the next menu command will change depending upon the current editor that is active, and whether or not split orientation is horizontal or vertical, to make it more clear which editor the item will be loaded in.

Use this command to open the selected items in the current split, replacing what you are currently working with.

**in Other Editor**  Open the selected items in the inactive split, opening a new split if necessary to do so. For example you can select a card in a corkboard and use this keyboard shortcut to open a split and load the contents of that card into the split.


**as Quick Reference** Opens the selected document in a Quick Reference panel ([section 12.6](#)). When in a Scrivenings session, the current segment of the overall session that the cursor is within will be opened.

**in Copyholder** Opens the selected document in the copyholder for the current split ([subsection 8.1.5](#)), opening a new one if necessary. When used in a Scrivenings session, the currently active segment of text will be loaded by itself.


**in Quick Look** This menu command is only available for types of files that Scrivener does not support with its built-in viewer. It will make use of your Mac's native Quick Look viewer, similar to having selected a file of that type in Finder and opening Quick Look from there.

**With Compilable Subdocuments** Similarly to “With All Subdocuments as Flat List” (below), this loads into the view only those items that are set to include in compile ([subsection 13.5.1](#)). Read more about filtering items in group view ([section 11.4](#)).

**With All Subdocuments as Flat List** ▶ Useful for cases where you'd like to see all of the cards in a particular section of your outline, even if they are nested several layers deep. The result of this command is a multiple selection, which means the items cannot be reordered as all depth information is lost by viewing cards this way.


- *On Editor Corkboard:* replaces the current editor view with the selected item's contents. This is similar to pressing  to open selected cards on the corkboard, only it also will add all of their descendants to the corkboard as well.

- *On Other Editor Corkboard*: as with above, but uses the inactive split to open the item, instead of replacing the current view, creating a split if necessary.

**in External Editor**  This command will open a file using the default editor for that type of file (for example, loading a PDF in Preview). This command is available on any type of item that is not a text or folder document. Opening items this way allows them to be viewed or edited in their native applications. Any edits made externally will be saved back into the project seamlessly. If Scrivener can display the type of file you edited, you might need to refresh the viewer to see your changes ([section 8.1.3](#)).

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**Editor** ▶ This submenu contains navigation commands that impact the editor and any content that it is viewing. When multiple splits are open, the commands target the active split. Some of the commands may also be available from Quick Reference and copyholder panes, and will be noted if so.


**Lock in Place**  Locks the editor (or split) so that no external navigation commands (such as clicking in the binder) will affect it, causing the other editor split, if available, to load the request instead (this behaviour can be adjusted in the Behaviors: Navigation settings pane, by setting **When focused editor is locked in place** to “Binder selection does nothing”). When an editor is locked, its header bar will turn a different shade of grey, and display a lock icon on the right. Read more in Locking the Editor ([subsection 12.2.1](#)).

**Lock Inspector to Editor** Available when the editor is split, this command locks the inspector sidebar to the currently active split. Ordinarily the inspector tracks the selection within whichever split you are currently working in. When this is engaged, the inspector header bar will turn a different shade of grey and the split it is locked to will be indicated by an “inspector” icon in the header bar. You can now use the other split while leaving inspector material alone and available for reference. Read more about Locking the Inspector ([subsection 13.1.1](#)).


**Lock Group View Mode** Available only when the active editor is displaying a group view, or if the selected item is a container (folder, or file group acting as a folder). Any view mode can be locked, including single text document mode. Locking is a per-item setting, and is saved into the folder or container itself. The view mode will stick to what was in use at the time it was locked. You can change its saved view mode by simply switching the view mode while viewing the item. Read more about Locking the Group View Mode ([subsection 12.2.2](#)).

**Scroll to Previous Page** This and the following menu command are only available when Page View is enabled in the active editor, or when viewing a PDF. Scrolls the view so that the top of the previous page is flush with the top of the viewer, keeping the reading area stable as you browse.





**Scroll to Next Page** Scrolls the view so that the top of the next page is flush with the top of the viewer, keeping the reading area stable as you browse.

**Forward in Document History**  Much like a Web browser, the editor keeps track of everything you've visited within the project. Using these commands you can navigate back and forth in the history. You can also use the Forward and Backward buttons in the header bar (right-click on them to access the full history as a list). Each split keeps its own history.

This command visits the document you were looking at prior to having gone back in history to the current document.

**Backward in Document History**  This command visits the document you were looking at before you navigated to the current one, and if you use it again, to the one you were visiting before *that*, and so on.

**Other Editor** ▶ There are a few commands designed for use while writing in split view, that have an impact on the *other* editor without removing your typing focus from the current editor. I.e. You can scroll the other split and operate its history even while continuously writing in the main split.

- *Forward in History* (): activates the “Forward in Document History” behaviour for the other split.
- *Backward in History* (): activates the “Backward in Document History” behaviour for the other split.
- *Scroll Up* ( ↑): scrolls the other editor back a page, similar to having pressed the **PgUp** key with it active.
- *Scroll Down* ( ↓): scrolls the other editor forward a page, similar to having pressed the **PgDn** key with it active.
- *Previous Page*: scrolls the top of the previous page into view, when the other editor is in Page View or displaying a PDF.
- *Next Page*: as above, only for the next page.

**Clear Document History** Use this command to wipe the document history (both forward and backward) for the active editor or copyholder.

**Media ▶** Controls and options for various types of playable media. These commands will only become available when viewing the appropriate type of media. Read more in Viewing Multimedia Documents ([section 8.1.3](#)).

If the editor is split this shortcut will start and stop the media even from the *other* split, allowing you to easily transcribe or reference the media while working elsewhere. When two media files are open at once, the shortcut will affect the active split.

**Play Media File ⌘Return** Functionally, this acts like clicking the Play or Pause button in the media viewer, for either audio or video files.

**Fast Forward ⌘⇧J** Jump playback forward by two seconds. This shortcut works while playback is running or paused. In the latter case, it will stay paused at the new position.

**Rewind ⌘⇧J** Jump playback backward by two seconds, and otherwise follows all of the rules outlined above.

**Rewind on Pause** This project setting toggles the behaviour whereby whenever media playback is paused, upon resumption it will be rewound by a determined number of seconds in the Behaviors: Playback settings pane ([subsection B.4.8](#)).

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**Move Focus To ▶** Provides application focus navigation tools. Rather than navigating around in your project, these commands will let you quickly select different parts of the project window without using the mouse. The first lets you cycle between common elements, while the rest will jump immediately to that element of the interface, no matter where focus is currently placed. Note that in all cases, the elements you wish to cycle or jump to must actually already be visible. These shortcuts will not automatically reveal parts of the interface that are currently hidden.

**Rotate through main views ^Tab** Rotates through the three most common areas of desired focus: the two editor splits and the binder. It will cycle between these three going left to right, and the label of this menu item will be changed to indicate where the next target will be.

**Binder ^⇧B** Moves focus to the binder sidebar from anywhere in the interface, if visible.

**Left|Bottom Editor ^⇧E** Moves focus to the Left or Bottom editor, if the editor has been split. When the view is not split, this command will be named “Editor” and will select the main editor.

**Right|Top Editor** `^⌘⌘R` Moves focus to the Right or Top editor, if the editor has been split. When the view is not split, this command will be named “Other Editor”, and will naturally be disabled.

**Header Bar Title** `^⌘⌘T` Moves focus to the editor header bar title area where you can edit the name of the item you are currently viewing in the editor. If you are viewing something that cannot be renamed (such as a multiple selection) then the command will be disabled. Use **Return** to confirm your changes and bring the typing focus back into the main viewing area of the editor.

**Copyholder** `^⌘⌘D` If only one copyholder is visible on the screen (or none), then this command will be named “Copyholder”, and target it no matter which split the focus is current in. Otherwise it will target the copyholder that is attached to the editor that is currently active, and the menu name will be altered accordingly.

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**Inspect** › In continuation of the keyboard focus functions, these deal solely with the revealing and focusing of inspector tabs ([chapter 13](#)), and occasionally sub-panes within them. The shortcuts work on the following principles:

1. The inspector itself will be revealed if necessary when the command is used.
2. If the keyboard shortcut causes the inspector to switch to its respective tab, then the action will simply reveal it without disturbing your original typing focus. If the targeted pane within the tap has been collapsed previously, then this shortcut will also expand it
3. If the tab is already visible, then the shortcut will *switch keyboard focus* to the associated metadata area within that tab, allowing you to interact with its contents without having to use the mouse.

**Notes** `^⌘⌘H` Reveals or switches focus to the notes tab. Use the Synopsis command below to focus the upper “index card” portion of this tab.

**Bookmarks** `^⌘⌘N` Reveals or switches focus to the bookmark list. Use `⌘6` to switch between viewing project and document bookmarks. Once you have selected a bookmark you wish to edit in the preview area below, hit the **Tab** key to switch panes. Double-clicking on a bookmark, or pressing the **Return** key will load the selected bookmark in accordance with the settings in the Behaviors: Document Links settings pane ([subsection B.4.2](#)).

**Metadata** `^⌘⌘J` Reveals the metadata tab, and switches focus to the Custom Metadata pane within it. Use **Tab** and `⇧Tab` to navigate between text

and date fields. Use the Keywords command below to switch focus to the lower third of this tab.

**Snapshots**  $\text{^}\backslash\text{⌘}\text{M}$  Reveals or switches focus to the snapshot list. Use arrow keys to flip between available snapshots and view their contents in the preview area below. Press the **Tab** key to switch keyboard focus into the snapshot viewer, where you can use Select All and copy, or use the page up and down keys to scroll the view.

**Comments and Footnotes**  $\text{^}\backslash\text{⌘}\text{K}$  Reveals or switches focus to the comments & footnotes tab. The  $\uparrow$  and  $\downarrow$  keys can be used to navigate through the list, and  $\rightarrow$  and  $\leftarrow$  to expand and collapse selected notes.

**Synopsis**  $\text{^}\backslash\text{⌘}\text{I}$  Reveals the notes tab and switches focus to the synopsis text area. Use the Notes command above to focus on the lower portion of this tab. Use the  $\text{⌘}7$  keyboard shortcut to switch between viewing the synopsis as an image or text.

**Keywords**  $\text{^}\backslash\text{⌘}\text{L}$  Reveals the metadata tab, and switches focus to the Keywords pane within it. Arrow keys can be used to navigate amongst keywords; **Return** can be used to add new keywords; **Delete** will remove selected keywords.

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**Outline Groups** ▶ These commands make it easy to jump from one group to the next, where group is defined as any folder in the binder. This behaviour can be altered to also include all containers with subdocuments, in the Behaviors: Folders & Files settings pane ([subsection B.4.5](#)).

**Previous Group**  $\text{^}\backslash\uparrow$  Jumps the selection to the previous visible container in the active outliner or binder, no matter what the depth. If a container is currently hidden, it will be skipped. If you only wish to select the parent container of a the current item, you can use the  $\leftarrow$  key.

**Next Group**  $\text{^}\backslash\downarrow$  Working in the same fashion as Previous Group, only selecting the *next* visible container downward from the current position.

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**Binder Selection Affects** ▶ These project settings toggle which split binder sidebar clicks will be opened in. By default when you click on something in the sidebar it will be sent to the targeted editor (so long as it is not locked). This will adjust that behaviour so that the clicks go to a predetermined editor in all cases, depending on the choice made below. If the editor is not split, this menu will be deactivated as all clicks will naturally go to the only available editor.



When any of the following options besides “Current Editor” is selected, the targeted header bar(s) will be accented to indicate where clicks will be sent. Read more about the header bar ([subsection 8.1.1](#)).

This command is also available from the binder contextual menu.

**Current Editor** This is the default behaviour out of the box. Whichever split you clicked in last will be targeted.

**Other Editor** Whichever split is *not* currently active will be targeted. This way your current work space is never disturbed by usage of the binder.

**Top|Left Editor Only** The top or left split (depending upon orientation) will always take binder clicks no matter which split is active.

**Bottom|Right Editor Only** The bottom or right split (depending upon orientation) will always take binder clicks no matter which split is active.

**Both Editors** In this special case, *both* editors will update whenever you click on something in the binder. This will most often be useful when using two different group view modes. You could have an outline in the left view and a Scrivener session in the right, both showing the same area of the binder in their own unique ways.

**None** Neither editor will update when using the binder. In this mode of usage, you will always need to manually open items into an editor. This can be done by using the Open commands in the right-click menu or **Navigate** menu, or by drag and drop into the header bar.

**Open Non-Group Items in Other** This special additional option will become available when the binder is set to affect one or the other editor, or when it is set to affect both editors. When set, clicking on individual documents in the binder will send the click to the *other* editor. Details on how this feature works are described in Making Splits Load by Type ([subsection 12.2.4](#)).

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**Outliner|Corkboard Selection Affects** ▶ The project settings in this submenu impact how splits interact with one another. When enabled, the effect is to cause the active split to act a bit like the binder sidebar, in that whatever you click on within it will automatically be loaded in the other split.

This behaviour can also be toggled in the footer bar with a toggle button that rotates between the available modes in this menu ([subsection 12.2.5](#)), and from the Touch Bar. If there is neither a split editor or a copyholder then these options will be ignored until they once again become applicable.



**None** This is the default behaviour. Clicking on rows in the outliner or cards in the corkboard will never automatically open those items in other views.

**Other Editor** When selecting items in the corkboard or outliner view, they will be automatically loaded into the other split view using its preferred view settings.


**Copyholder** If a copyholder has been attached to the current editor, you can elect to have any individually selected items loaded within it automatically, turning it into a viewer for the split.

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**Clear All Navigation Options** Removes all settings from the active project window that impact navigation, as described in [Clearing Navigation Settings \(section 12.5\)](#).

## A.8 Project Menu

The Project menu addresses commands and configuration options specific to the active project, such as text formatting over-rides, custom metadata and statistics. If more than one project is open, this menu will make use of the foremost project window.

**New Text**  Creates a new text document below the current selection, or list of documents, within the current view. When a folder is selected, the new file will be created within the folder.<sup>13</sup> Otherwise the new file will appear as a sibling below the current selection, or the location of the current document that is being edited.

When the current position for a new item is within a container that has a default subdocument template ([subsection 7.5.2](#)) assigned to it, the menu label will change to reflect that. E.g. if the current folder has a default template of “Interview Transcription”, then the menu label will read, “New Interview Transcription”.

**New Folder**  Creates a new folder below the current selection or list of documents within the current view. Folders will always be created as a sibling to the current selection, save for when that selection is either the Draft or Research special root folders.

For more information on how items are placed when creating them, read [Figuring Out Where Things Will Go \(section 6.3.1\)](#).

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<sup>13</sup> This behaviour is expanded to include all containers when **Treat all documents with subdocuments as folders** is set to true, in the Behaviors: Folders & Files settings pane ([subsection B.4.5](#)).

**New From Template** ▶ ⌘⇧⌘N This submenu displays all of the document templates found within the current project in hierarchical order. If no template folder has been assigned, the menu will simply contain a message to that effect. Read more about Document Templates ([section 7.5](#)) if you'd like to create your own document types.

If you select a container from this menu, not only will that container be created as a new document, but all of its child templates will be brought along as well. You can thus easily create complex boilerplate structures of files and folders.

**Project Settings...** ⌘⇧⌘, If a setting isn't established in the main application Settings, or in one of Scrivener's menus, then chances are it can be found within the Project Settings panel. Section types, labels, status, custom metadata, text formatting, auto-completion lists, the document template folder, backdrop images and individual project backup settings and more can all be set up here. For detailed documentation on the various tabs within this panel, refer to Project Settings ([Appendix C](#)).

**Show|Hide Project Targets** ⌘⇧⌘T Toggles visibility of the floating project targets panel ([subsection 20.1.1](#)), for tracking a few simple metrics in real-time as you type and edit that can be left open while you work. These progress bars themselves can also be found in the toolbar's Quick Search tool ([section 11.5](#)) by default.

**Statistics...** ⌘⇧⌘S Opens a window displaying text statistics for the current project, including the word, character and page counts for the draft, the current binder selection or when called from a text editor, statistics for that section of text you are editing. Refer to Statistics ([subsection 20.1.3](#)) for more information.

**Writing History...** As you work in your project from one day to the next, Scrivener will record your writing progress in the background and keep a number of statistics available to you within this panel. You can also export the raw data to a CVS file, where you can then take the numbers into a spreadsheet for further visualisation or analysis. Read more in Writing History ([subsection 20.1.4](#)).

**Show|Hide Project Keywords** ⌘⇧⌘K Displays or closes the project keywords panel ([section 10.4.5](#)); for managing all of the keywords in use by your project or assigning them to items.

**Show|Hide Project Bookmarks** ⌘⇧⌘B This command has a few different results based upon the context of its usage. Refer to Project and Document Bookmarks ([section 10.3](#)) for full documentation on this feature.

- *Project window is active:* if not already shown, a list of bookmarks in a floating window will be opened, where they can be managed or nav-

igated to. If it is shown but you are working in the project window, then this command brings the panel to focus. You can also open this panel by clicking on the Bookmarks button in the toolbar and then “tearing” the panel off by clicking and dragging from any of its borders.

- *Bookmark list is active*: when this command is invoked while the bookmark list is open *and* active it will have the same effect as clicking the expansion button in the upper-right corner (marked (a) in [Figure 10.9](#)): converting the tool into a Quick Reference panel so you can quickly review the contents of your bookmarks.
- *Quick Reference panel is active*: toggles whether or not the bookmarks sidebar is visible on that window. This is the same as clicking the bookmark icon in the window’s footer bar, marked (b) in the figure.
- Hold down the **Option** key when selecting this menu command, or when using the shortcut, to go straight to a Quick Reference panel with the bookmarks sidebar open.

**Empty Trash...** Permanently discards the current contents of the project Trash folder. You will be warned before this is done, as once contents have been deleted, there is no way to undo that action. This can also be done by right-clicking on the trash folder itself in the binder.

If you instead wish to only delete some items from the trash, select them from within the trash folder and use the **Edit ▶ Delete** menu command.

## A.9 Documents Menu

Contains all commands relating directly to existing documents, such as duplicating and splitting, moving and copying them, converting between types, bookmarking, setting icons, cleaning up formatting, titles and synopsis, managing snapshots of text milestones and so forth.

**Snapshots ▶** This submenu provides commands to manage a document’s snapshots, make new ones, and commit large-scale snapshot actions on selected items. Some of these commands will be unavailable if the selection includes items that are not text items. For more information on how to use snapshots, see Using Snapshots ([section 15.8](#)).

**Take Snapshots (of Selected Documents) ⌘ 5** When viewing any text or folder document, this command will take a snapshot of the current text and store it for later use. When selecting multiple items, this command will rename to indicate that all selected items will be independently snapshot.

### How to snapshot an entire folder

Selections are explicit, but you can easily select a folder and all of its subdocuments with a single command, **Edit ▶ Select ▶ Select with Subdocuments** (**⌘A**), from an outliner or binder view, and then take the snapshots.

**Take Titled Snapshots (of Selected Documents)** **⌘5** You will be asked to provide a name for the snapshot before it is taken. This name will be displayed in the snapshot list in the inspector ([section 13.6](#)). Snapshots can be renamed at any time.

**Show Snapshots** Reveals the snapshots tab in the inspector, opening the inspector if necessary.

**Show Changes ▶** When a snapshot is selected from the snapshot list, it is possible to view the changes between that snapshot and the current document. When two snapshots are selected, those two snapshots will be compared between each other, using the older as the original. These features are more conveniently available in the Snapshots inspector tab ([subsection 13.6.4](#)).

Comparisons can also be performed in the main editor or copyholders. Refer to Comparing Changes in the Editors ([subsection 15.8.4](#)) for more information.

- *Compare*: Toggles visibility of the change tracking mode.
- *Comparison Granularity*: Use these settings to fine-tune the markings if what you are getting is too precise or vague to be useful. The setting can be toggled on and off individually to determine how closely changes will be tracked, with the finest level selected being the used method. “By Paragraph” will only mark changes at the paragraph level; “By Clause” only marks changes made at the phrase level; “By Word” is the most detailed level of change tracking available.
- *Next Change* (**⌘1**): Scrolls to the the next available difference in text. This and the following command can also be used from the copyholder or main editor, when viewing a snapshot in comparison mode within them.
- *Previous Change* (**⌘2**): Scrolls to the previous available difference in text.

**Roll Back** Rolls back to the selected snapshot, replacing the text in the main editor. The option to snapshot the *current* state of the editor text, before reverting it to the snapshot’s state, will be given in a dialogue box.

**Delete** Permanently removes the selected snapshot from the disk. You will be asked to confirm this action as it cannot be undone. You may also delete snapshots with the **Delete** key, or by clicking the **–** button in the Snapshots Inspector.

**Show Snapshots Manager** Opens the Snapshots Manager ([subsection 15.8.5](#)) window, where all snapshots in the project can be browsed and managed from a convenient central location.

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**Duplicate ▶** These commands require an active selection in the binder sidebar, corkboard or outliner view. There are two different methods you can use to duplicate selected items.

**with Subdocuments and Unique Title ⌘D** The item (including all of its children if it has any) will be duplicated, and it will be provided with a unique name automatically. If the current title ends in a hyphen + numeral, Scrivener will use an incremented number in the copy. For example is the document you are duplicating is called “scene-5”, duplicating it would result in a file called “scene-6”. It will otherwise add “-1” to the end of the duplicated item, starting a new sequence if further duplications are made. This command is also available from the binder contextual menu.

**without Subdocuments** This is most useful when you only want to duplicate the container of an item by itself (such as a chapter folder), but not all of the subdocuments within it. In this case, a unique name will *not* be provided.

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**Split ▶** These commands require an active text editor. Provided are two methods for splitting the current document in two. In both cases, everything below the current cursor position will be moved into a new binder item following it. Everything above the cursor will remain unchanged in the original item. This action cannot be undone (except via the Merge command, below). Refer to Splitting and Merging Documents ([section 15.4](#)) for more information.

**at Selection ⌘⌘K** Split the new document off from the current one, using all text after the current caret position (this can even split a paragraph in two). In cases where text has been selected, the caret position will be considered as the start of the selection range.

**with Selection as Title ⇧⌘⌘K** In all details this command works identically as the above, but in this case the currently selected text will be used to title the new document that is created, rather than leaving the title empty.

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**Merge** ⌘ M This command requires a selection of two or more text or folder items in the binder sidebar, corkboard or outliner. In opposition to splitting (above), merging will combine the selected text items together into a single document. This action cannot be undone (except via the split command).

In those fields where combination makes sense, such as notes and keywords, all of the documents will be used to create a combined result. Refer to Splitting and Merging Documents ([section 15.4](#)) for more information.

**New Folder From Selection** ⌘ G Takes one or more selected items and groups them into a new folder. You will be given the option to name that folder after invoking the command. When used from a selection of index cards on the corkboard, the selected cards will “disappear” from the current corkboard into the newly created folder card. You can double-click on the new folder’s icon in its index card to visit them. This command is also available from the binder contextual menu.

**Ungroup** ⌘ U This command only works when a single container is selected in the binder sidebar, corkboard or outliner views. In opposition to grouping, ungroup will move the contents of the selected container up one level so that they become siblings of that container. This action will not change or move the original container, allowing you to move the items back in, if it was made in error. This command is also available from the binder contextual menu.

The following movement, copying and collection assignment commands operate on the document being edited in the active editor, the active subsection within a Scrivenings session, or for bulk items, in the binder sidebar, corkboard and outliner views.

**Move To** ▶ Will move the selected items into the target that you choose from this binder item selection submenu.

The upper portion of this menu, labelled “Favorites”, will track the most commonly and recently used targets in this project. When a new item is used, it will be given a priority listing in this area, but will fall off the list more quickly than other more frequently used targets, if seldom used again. This command is also available from the binder contextual menu.

**Move To “X” Again** ⌘ T This convenience command will appear if during the current session you have moved an item using the “Move To” submenu above it. It will target last location you used with this command, making it easy to repeatedly send documents to the same location. This command is also available from the binder contextual menu.



**Copy To ▶** Operating in a very similar fashion to the **Documents ▶ Move To ▶** submenu, the selected documents (and all child items beneath them) will be *copied* to the target location, leaving the originals where they were. This command is also available from the binder contextual menu.

If you would prefer to use drag and drop with the mouse to perform this action, you will need to enable that behaviour in the Behaviors: Dragging & Dropping settings pane ([subsection B.4.4](#)). You can then hold down the **Option** key while dragging to create copies of the selected items in the dropped location.

**Copy To Project ▶** Selected items can be copied to other open Scrivener projects. From this submenu, select the project you wish to copy to, and then from within its menu, the location within its binder. This command is also available from the binder contextual menu.

**Copy To “X” Project Again ⌘⇧⌘C** This convenience command will appear if during the current session you have copied an item using the “Copy to Project” submenu above. The selected items will be copied to the same binder location with the last project you targeted with the command. This command is also available from the binder contextual menu.

**Add to Collection ▶** The menu will display a list of all standard collections ([subsection 10.2.2](#)) in the project.<sup>14</sup> The currently selected items will all be added to the collection you choose from this submenu. This command is also available from the binder contextual menu.

At the top of this menu (or as a sole entry if there are no standard collections yet in the project) will be a “New Collection” command. Using this option will reveal the collection tab list above the binder, where the name of the new collection can be typed in. This can also be done by clicking the **+** button in the collection tab list header bar when it is open.

**Add to|Remove from Project Bookmarks** The selected items will be appended to the project bookmarks ([section 10.3](#)) list if they are not already listed within it. If the entire selection is already listed then the “Add to Project Bookmarks” command will be disabled. Use the opposing command, “Remove from Project Bookmarks” to remove all selected items from the list.

When the selection is mixed, containing some items that are bookmarked and some that are not, these commands will still be made available. This way you needn’t know for sure if every time you selected is actually on the list or not. This command is also available from the binder contextual menu.

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<sup>14</sup> It is not possible to add items manually to search collections, which are dynamically generated.



**Convert ▶** This submenu provides tools for converting the document's type, scriptwriting mode, or text formatting.

**Text to Default Formatting...** Resets the text of the selected files and folders (or the text in the active editor session, including multiple documents in Scrivenings) to the default formatting used for new files. This default is established either globally in the Editing: Formatting settings pane ([subsection B.3.2](#)), or on a per-project basis in project settings ([section C.5](#)). You may also wish to read more about Resetting Formatting ([subsection 15.7.5](#)) in general.

**Script Format...** Useful when you need to switch from one scripting standard to another. Note that if all you wish to do is change the current document writing mode, you should use **Format ▶ Scriptwriting ▶ Script Mode (⌘8)** to do so. This function is strictly for converting between pre-existing scripts to bring them up to spec. For more information on scriptwriting, see Scriptwriting ([chapter 19](#)).

**to File|Folder** Converts the selected items to folders or files respectively. Note that these two document types are very similar in Scrivener, so this tool makes it easy to change your mind later about whether or not something should be a folder or a file. If the selection contains a mix of types, or items that are neither files nor folders, then the command will be disabled. This command is also available from the binder contextual menu.

**Web and PDF files to Text** Activates when viewing a WebArchive or PDF item. Scours the file for its text content and create a rich text file from it that is editable and considered a text document from that point onward. Note this cannot be undone. Create a duplicate of the original beforehand if you wish to retain a copy with its full layout.

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**Auto-Fill ▶** These commands can be useful for managing the titles and synopses of files in conjunction with text found or selected in the main editor.

**Set Selected Text as Title ⌘⌘T** When text has been selected in the main editor the title for the current document will be set to that selection. If you are splitting up a longer document into a format more useful within Scrivener, consider using the **Documents ▶ Split ▶ with Selection as Title (⌘⌘K)** menu command instead.

**Clear Titles** Removes the titles from all selected documents, leaving them blank. This has the effect of causing them to print the first few words from either the synopsis or main text content (in that order of precedence) in various contexts such as the binder sidebar.

**Set Synopsis from Main Text|Selection** ⇧⌘⌘! This command has two modes of operation:

- *Set Synopses from Main Text*: when the active selection is a quantity of files in a group view, such as the corkboard or binder, each item will have its synopsis updated to use the first few lines of text in that folder or file (it will be left blank if there is no text). This command also works on the current document (or chunk within a Scrivening session) if a text editor is active.
- *Set Synopsis from Selection*: if text has been selected within the main editor, then this alternate menu command will appear. The synopsis will be set to the selected text alone rather than using the first few lines from the top of the section. In Scrivenings mode, if the selection crosses the boundary of sections, the file the selection ends within will be affected by the command, but the entire selection will be used for the synopsis, even though it may come from several files.

**Send Synopsis to Main Text** Useful if you’ve done a little pre-composition in Outliner or Corkboard mode, and now wish to push those ideas into the manuscript text. When used, the contents of the selected items’ synopses fields will be appended to the end of the main text for each item, respectively.

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**Change Alias Source...** If the selected binder item is an alias to some other file on your disk, this command will allow you to point it to a different file on the disk. This will most often be useful if the original file has gone missing and has been restored.

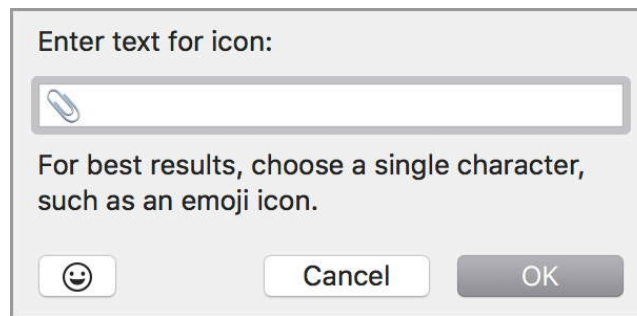
**Replace Media File...** When anything other than a native folder or file has been selected in the binder, this command allows you to swap out the stored data with another file on your hard drive. A practical example where this could be useful is if you have a cover image for your book in the binder and you receive an updated copy from the artist. The new cover would be imported, replacing the old image within the project.

**Default Template for Subdocuments** ▶ Select any existing group in the binder and use this command to make it so that new files created within that group will use the selected document template instead of the default text file type. To revert its behaviour to default, select the “Text” choice at the top of this submenu. In projects lacking templates, this menu will simply offer “Text” as the sole choice. Refer to Default Subdocument Template (subsection 7.5.2) for further information.

**Change Icon ▶** This submenu displays all built-in and any custom icons added to the project or installed on your machine. Select items in any group view and then choose an icon from this menu to change their icons. When used from the editor or copyholder, the active document will have its icon changed. This command is also available from the binder contextual menu.

**Reset Icon to Default** Select this option to remove a custom icon from the selected documents, or the active document from the current editor or copyholder.

**Icon from Text...** Using this tool, you can take any text and turn it into an icon. This will work best with single characters, such as Unicode symbols or Emoji. Refer to Icons from Other Sources ([section 7.4.1](#)). This command will automatically bring up the Mac’s Emoji & Symbols utility. If you need to open it again, you can click the “smiley face” button ([Figure A.4](#)).



**Figure A.4** Adding the “Paperclip” Emoji as an icon.

**Manage Custom Icons...** Opens the Manage Icons dialogue, where you can add or remove your own custom icons. You can manage both icons loaded into the project as well as those installed on the system from here. For more information on managing and creating icons, read Custom Icons ([section 7.4](#)).

**Text Based Icons ▶** This submenu will list any text-based (such as Emoji) icons that have been found within the project, or that have been used in the current session. As you add or remove such icons from the project, this menu will list it so you can conveniently add them to new items, even in other open projects.

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**Move to Trash ⌘Delete** Moves items selected in the binder sidebar, corkboard or outliner to the project’s Trash folder. Scrivener works in the same fashion that the Finder does, in that files are not deleted permanently until

you empty the Trash. Periodically, you can review the contents of your project's Trash folder and empty it to clear up space, using the **Projects/Empty Trash...** command. This command is also available from the binder contextual menu.

## A.10 Format Menu

The Format menu contains all commands that deal with formatting text in views where formatting is allowed. It contains all of the usual commands you would expect to find for changing the font, setting line spacing, creating tables and lists and controlling the ruler. Additional tools related to formatting will be found here, such as revision markings, scriptwriting tools and style commands. Some text contexts (such as the Document Notes sidebar) only use a subset of the commands available in this menu.

**Font ▶** All commands relating to direct character formatting will be found in this section of the menu. This includes basic settings like bold, italics and adjusting the size, as well as more advanced kerning and other typographic features. Use these settings to establish the formatting for styles or modify text on the fly. A portion of these tools can also be found in the Format Bar ([subsection 15.7.2](#)).

**Show Fonts ⌘T** Access the standard system font palette. Use this to change the font settings you type in from that point forward, or alter the existing font of a selected range of text.

**Bold/Italic ⌘B & ⌘I** These basic formatting commands work by either modifying the cursor attributes if there is no selection, or toggling the selected text between the various styles. Note that not all fonts support bold and italics. If it appears that one of these is not working, check your font for the proper typefaces.

**Underline ▶ ⌘U** This submenu provides several underlining styles. The default command with the shortcut is what most people will wish to use when underscoring text. Use the “By Word” option to omit underscoring across whitespace characters.

**Strikethrough ⇧⌘\_** Crosses out the text you have selected. When used in conjunction with marking revisions ([section 18.6](#)), the current revision level colour will be used for the strikeout. Strikethrough can also be applied to text in PDF documents.


More than cosmetic, struck-through text can be easily deleted at a later time via the **Edit ▶ Text Tidying ▶ Delete Struck-Through Text** menu command, and can be dynamically stricken from the output with the **Delete struck-through text** setting in the compile overview screen, under general options ([subsection 23.4.3](#)).

**Outline** Changes the style of the font to outlined instead of filled. This will be more useful with larger, heading size fonts with heavier weights.

**Bigger** ⌘+ Increases the size of the font by a small amount.

**Smaller** ⌘- Decreases the size of the font by a small amount.

**Character Spacing** ▸ Adjust the kerning of the selected text, or between the two characters around the cursor. The “Use Default” selection allows the font to choose the kerning based on the designer’s metrics (this will nearly always be the best choice), while “Use None” disables the font’s built-in kerning. It would be advantageous to set keyboard shortcuts to the “Tighten” and “Loosen” commands if you intend to use these frequently.

**Ligature** ▸ If the font family supports typographic ligatures, they can be enabled or disabled here. Most fonts default to using standard ligatures (ff, fl, fi and so on). Some include rare ligatures, which may be enabled by the “All” setting. It will usually be better to use the **Format ▸ Show Fonts** panel, click on the  button and open the “Typography” panel, for more precise and extensive options.

**Baseline** ▸ Adjust the baseline height of the text, most commonly referred to as superscripting and subscripting. In addition to jumping straight to those presets with respective commands, you can also incrementally raise and lower the baseline. “Use Default” will reset the baseline to the normal.

**Character Shape** ▸ If the font family supports typographic shape alternates, such as old style numerals and traditional forms, they may be selected here.

**Copy Font** ⌘⌘C Copies the character attributes from the current cursor position. This includes all forms of inline formatting (such as colour or strikethrough).

**Paste Font** ⌘⌘V Use this command to apply the character attributes from a clipboard, copied from any of the copy formatting commands, to other selections of text.

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**Paragraph** ▸ Displays the standard macOS Text submenu, which contains useful tools for controlling the paragraph-level formatting of your text. Paragraph alignment and spacing can also be controlled with the the Format Bar ([subsection 15.7.2](#)), and tab stops and indents with The Ruler ([subsection 15.7.1](#)).

**Align Left** ⌘⌘{ Sets alignment on the selected paragraphs to flush left (or ragged right, as it is sometimes referred to).

**Center** ⌘| Centres the alignment of the current paragraph to the current left and right indent offsets.

**Justify** ⌘⇧⌘\ Sets alignment on the selected paragraphs to fully justified, or flush left and right.

**Align Right** ⌘} Sets alignment on the selected paragraphs to flush right (or ragged left).

**Tabs and Indents...** Brings up a panel that can be used to manage tabs and set paragraph indenting using precise measurements, rather than with the visual ruler. For more information on using this panel, refer to The Tabs and Indents Tool ([section 15.7.1](#)).

**Increase/Decrease Indents** ▶ The commands in this submenu all operate on the currently selected paragraphs, and are provided primarily so that you can supply custom keyboard shortcuts to the most frequently used commands. They incrementally adjust the three different indent aspects of a paragraph, which can all alternatively be adjusted using the sliders on the ruler (⌘R).

The amount of increment used depends on the unit of measurement set in the Editing: Options settings pane ([subsection B.3.1](#)), with the **Ruler Units** setting. All methods will adjust indentation in increments of 0.5cm; 0.25in; 1.5 picas and 18 points, relative to any existing indent settings on the paragraph.

- *Indents* ⌘⇧⌘→ & ⌘⇧⌘←: Works as a simple offset, where all left-side indent settings are moved left or right uniformly. E.g. a hanging indent paragraph will remain hanging, but with both indent settings moved one way or another.

This command is synonymous with the **Edit ▶ Move ▶ Move Left** and **Move Right** commands.

- *First Line Indent* ⌘⇧⌘⇧⌘→ & ⌘⇧⌘⇧⌘←: Only the first line will have its indent increased or decreased. When the rest of the paragraph is indented it is possible to decrease the first line indent beyond the rest of the paragraph, forming a hanging indent (though in general it will be easier to use the next command to create these).
- *Hanging Indent*: The main body of the paragraph will have its indent level adjusted while leaving the first line indent alone. If the paragraph is already indented then it may be possible to decrease the indent level beyond the first line, resulting in a normal looking paragraph.
- *Right Indent*: The right-hand indent of the paragraph will be increased or decreased. It is important to be aware of the fact that a

right indent is measured from the *left* of the page, not the right. In other words if you move the right indent inward 2cm, the indent setting might be more like 16.5cm (from the left), which could have implications if the margins or paper size change.

**Remove All Tab Stops** A convenience tool to delete all tab stops in the current paragraph or selection.

**Line and Paragraph Spacing...** Brings up a handy tool for setting paragraph and line spacing attributes in the selected or current paragraphs. You can also access this tool from the Format Bar ([subsection 15.7.2](#)).


**Writing Direction** Toggle between Left-to-Right and Right-to-Left writing styles. This will usually be automatically done for you when changing keyboard input modes.

**Keep with Next** Inserts formatting on the current paragraph that will attempt to keep it glued with the next paragraph, so that they will not become separated by a naturally occurring page break. Select **Yes** to enable this characteristic for the selected paragraphs.

The **Can Split Across Pages** option is dependent upon **Yes** being selected. This setting will allow the designated paragraph to *itself* be split across pages, rather than moving the whole paragraph to the next page. Use this setting for cases where the paragraphs you wish to keep together are longer, such as a block quote and its attribution line.

**HTML Header Level** This will only be of interest in conjunction with styles in ebook and Web publishing, as well as the Markdown-based formats.<sup>15</sup> They will set the heading level for the selected text in these outputs when compiling, and will be saved into any styles you create from that text. Unless you intend to use headings directly in your text, you may not even have use for these commands until you are actually setting up styles in the Styles compile format pane itself ([section 24.5](#)).

Use of these commands will have no visual effect on the text, they only determine what HTML level the text will be set to.

**Copy Paragraph Attributes**  **C** Stores the ruler and paragraph format settings from the current paragraph. These settings can be applied into any rich text view, even compile settings panels that take formatted text.

**Paste Paragraph Attributes**  **V** Applies stored ruler and paragraph settings to the selected or current paragraphs.

---

<sup>15</sup> For the latter case, one must have the **Convert rich text to MultiMarkdown** option enabled, in the General Options tab of the compile overview screen ([subsection 23.4.3](#)).



.....

**Style ▶** Styles are a way of assigning meaning to your text, and optionally formatting or other visual cues. Once text has been assigned to a style it will stay in sync with any future updates made to that style's settings. Read more about Styles and Stylesheets ([chapter 17](#)).

**New Style From Selection...** Starts the creation process for a new style, using the formatting of the selected text, or from the paragraph the cursor is located within. Read more on Creating New Styles ([subsection 17.3.2](#)).

**Redefine Style From Selection ▶** Takes the formatting from the currently selected text or paragraph and updates the designated style you choose from this submenu. Read more on redefining a style ([subsection 17.3.3](#)).

**Delete Style ▶** Deletes the style you choose from this submenu. The formatting applied to text that is assigned to this style will be left alone, but the style assignment itself will be stripped from all text throughout the project.

**Show/Hide Styles Panel ^S** Toggles the display of the floating styles panel. If you use styles frequently you may wish to keep this open off to the side, so you can see at a glance which styles are applied to the text you are working with, and apply styles to text with a single click. You can also easily modify and manage your styles from within this pane. Refer to The Styles Panel ([subsection 17.2.3](#)) for further documentation on this feature.

**Show Styles Menu ⌘Y** Reveals the “Apply Style” menu directly on your screen without having to go to a separate menu or format bar to access them. It is not accessible when the document is in script writing mode, as the shortcut will be used for the **Format ▶ Scriptwriting ▶ Show Script Elements Menu** command.

**Set Default Formatting...** Loads the Project Settings: Formatting pane ([section C.5](#)), where you set what unstyled text should look like via the **Main text formatting** area.

**Import Styles...** Brings up a file selection dialogue box. Use this to select the Scrivener project from which you want to copy its stylesheet. Refer to Copying Stylesheets Between Projects ([section 17.5](#)) for further detail on how to manage merging when importing styles.

**No Style ⌘0** Depending upon the context, this command has different effects. When used upon selected text the styling from that selection will be stripped out, returning it to either the look of the paragraph style beneath it, or to standard unstyled text. When used without a selection within a paragraph that has a paragraph style applied to it, the paragraph style will be simply removed from the entire line.

When used while typing, the effect is to cease typing in the style that was being used up until that point. If used at the conclusion of a range of text in a character style, you will return to whatever paragraph style was in use underneath that, or to no style at all, depending on which is applicable.

*The remainder of this menu will list the paragraph and character styles available in this project. Use of them will apply the chosen style to the selected text, or alter the formatting of the cursor.*

.....

**Table ▶** Use the “Table...” command to insert a starter table (more easily access with the **Insert ▶ Table...** command). The remaining commands in this menu are documented in the tables contextual menu ([section 15.3.2](#)) section, and of course are also available when right-clicking directly inside of a table in the editor.

**Lists ▶** Supplies a few basic list formats, along with advanced controls for bullet and enumerated list management, with the “Custom List...” command. The list creation aspects of this menu are also available when clicking on the list button in the Format Bar ([subsection 15.7.2](#)). You can cycle through the various list styles from any existing list in the editor with the following commands:

- *Next List Style* (**⌘** **→**): selects the next list style from the currently selected style.
- *Previous List Style* (**⌘** **←**): selects the previous list style from the currently selected style.


**Scriptwriting ▶** Although Scrivener is not a dedicated script writing application such as Final Draft, Fade In Pro or WriterDuet, the scriptwriting tools make it relatively straightforward to create first drafts which can be later fine-tuned in these and similar applications. For full documentation on this feature, refer to Scriptwriting ([chapter 19](#)).

**Script Mode (Format) ⌘ 8** Toggles the current scripting mode on or off for the selected documents in any group view or the binder sidebar, and for the current document in the main editor—or all documents within the current Scrivenings session. Toggling script mode on and off only changes text input, not any aspects of text already been written. You can thus switch to normal prose and then back again, making this a great shortcut to learn when writing treatments.

**Script Settings...** Brings up the script settings window, where all aspects of the project’s script settings can be modified, and new scripts and elements can be created from scratch. Read more about this tool in Creating Your Own Script Formats ([section 19.7](#)).

**Re-capitalize Script** Any elements defined by the current script settings to be capitalised will be converted to all-cap text if they are not already. This will mainly be of use when importing text that isn't already capitalised.


**Change Element To** Converts the selected text to a different scripting element. If the previous element set the text to all-caps you will need to fix the text yourself, making use of the tools in the **Edit ▶ Transformations ▶** submenu.

**Show Script Elements Menu**  **Y** Reveals the script element selection menu, also available by clicking in the lower right corner of the editor footer bar. Single-letter shortcut keys can then be used to select an individual element, if the script settings have been configured to use them. For example in our built-in screenplay script, the “C” key will switch the line to Character mode.

This command will only be available when script writing mode is enabled in the active editor. The shortcut will otherwise bring up the styles menu.


*The remainder of this menu will list all of the scripting styles installed on your computer, along with a number of built-in styles that ship with Scrivener. For further information, refer to Formatting a Script in Scrivener ([section 19.1](#)).*

.....

**Color...**  **C** Toggles the visibility of the colour selection palette, which can be used to set the colour of selected text. When no selection is found, it will change the typing colour.

Note that Scrivener uses this palette for all cases where a custom colour can be set by you, but when invoked with a text editor active, the effect will be to colour the selected text or the cursor attributes.

**Highlight ▶** The highlight menu lets you place a background highlight behind the selected text, much like using a highlighter marker on paper. In addition to the five provided presets, this menu also displays any favourite colours that have been set on your system. For more information on how to use highlights, see Text Colour and Highlights ([section 18.5](#)).

**Highlight Text**  **H** Highlights the selected text, or alters the cursor's attributes, using whatever colour you used last. If the text is already highlighted and you are using the same highlight colour then the effect will be to remove highlighting from that text. Otherwise the text highlight will be switched to the new colour. Highlighting (in basic yellow) can also be applied to text in PDF files.

**Remove Color** Strips all highlighting that has been applied to the selected text.

**Show Colors...** This choice will appear at the very bottom of the list of colours. Use this to select a custom colour using the standard colour picker. If you right-click the highlight tool in the format bar, you will be provided with a number of handy presets ([subsection 15.7.2](#)).

.....


**Revision Mode** ▶ Revision modes force anything you type to be displayed in a designated colour until you disable the revision mode (it also impacts strike-outs). Select one of the five revision levels in this menu to enable the mode, and again to toggle it off. For more information, refer to Marking Revisions ([section 18.6](#)).


**Mark Revised** With text selected *and* a revision level in use, this command will mark the selected text range with the current revision colour.

**Remove Current Revision Color** This command is only available when one of the revision levels is active. It will strip the current level from the active editing session, leaving the rest alone.

**Remove (All) Revisions** Indiscriminately removes all five revision level colours from the active editing session. When text has been selected, the command will read “Remove Revisions” and only strip markings from within the selection.

.....

**Copy Formatting**  Store both paragraph and character attributes of the selected text’s formatting, for later application to other texts.

**Paste Formatting**  Pastes formatting stored with any of the following copy commands:

- **Format ▶ Font ▶ Copy Font**
- **Format ▶ Paragraph ▶ Copy Paragraph Attributes**
- **Format ▶ Copy Formatting**

The pasted formatting will apply to the selected text. Paragraph formatting alone will be pasted into the current paragraph when no text is selected.

**Preserve Formatting** This is a legacy feature from older versions of Scrivener. It will protect all formatting found within the range of text you apply it to, when compiling through formats that would otherwise change that text. Most of this capability is now provided through the stylesheet system, but there are still a few niche special-purpose uses for this command. Read more about them in Preserve Formatting ([subsection 15.7.6](#)).

**Make Formatting Default** This will make the currently-selected formatting in the editor the default formatting for all new documents, without otherwise going through and changing these settings in the Editing: Formatting Setting tab ([subsection B.3.2](#)) (or the Project Settings: Formatting pane ([section C.5](#)) if the project is overriding the application defaults). Upon use of the command you will be asked whether you want the attributes of the selected text to be used in your global application Settings or the project settings specifically. In the latter case, if you have not already enabled the option to override formatting in this project it will be set for you.

As always, this command only impacts text typed into newly created documents. It will *not* destroy formatting in existing files and projects. If you wish to do that yourself, you can with the **Documents ▸ Convert ▸ Text to Default Formatting...** menu command ([subsection 15.7.5](#)).

## A.11 Window Menu

The Window menu contains some standard commands for controlling windows, tabs and panels. It concludes with a list of all open projects.

**Minimize ⌘M** Minimises the window to the Dock. Hold down the **Option** key to minimise all.

**Zoom ^⌘-** Zooms the window in or out (the same as the green button in the top-left of the window). Scrivener will try to zoom intelligently to best fit the contents of the window, taking into account your preferred editor width.

**Zoom to Fit Screen ^⌘=** Zooms the window so that it fully fills the screen, excluding the Dock and menu bar, if visible.

**Show Previous Tab ⇧^Tab** Scrivener supports macOS tabbed window features. Projects can be combined into the same window as tabs, and Quick Reference panels can be combined into their own window. The following three commands will be disabled unless you have merged windows and have tabs in that active view.


This command selects the previous (left) tab in the current window.

**Show Next Tab** Selects the next (right) tab in the current window.

**Move Tab to New Window** Separate the current tab back out to its own window.



**Merge All Windows** Merges all open windows of a like kind (project vs Quick Reference) into a single window. If you wish to only merge select project windows together, first open the tab bar for each project with the **View ▸ Show Tab Bar** menu command, and then drag and drop the tab from one project into the other's tab bar.

**Layouts ▶** This submenu is populated by the saved layouts you’ve created, along with a few built-in layouts to get your started. Layouts provide an easy mechanism for rapidly converting your project window to different workflows, depending on what you are currently doing. Read more about Saved Layouts ([section 12.3](#)).

**Manage Layouts...**  Opens or activates the Layouts panel, where you can save, update, export/import or recall project window view settings.

.....

**Float Window** Toggles whether or not the current project window should “float” above all other windows. This will make it visible at all times, even when switching to other programs.

**Float Quick Reference Panels**   Toggles whether or not Quick Reference panels should float over all project windows for this specific project. This setting impacts all Quick Reference panels associated with the current project window. Panels from another open project will behave in accordance with that project’s settings.

**Show|Hide Scratchpad**   **Return** Displays or closes the floating Scratchpad Panel ([section 9.4](#)), useful for collecting information while using other applications.

**Bring All to Front** Brings all Scrivener windows to the front of other application windows. Hold down the Option key to change to Arrange in Front.















The next portion of the menu only appears if the currently active project has open Quick Reference panels. They will each be listed in this section by name.

**Close All** Close all open Quick Reference panels for the current project.

**Closed Quick Reference Panels** During a single session, any Quick Reference panels that have been closed will be saved into this submenu, giving you quick access to them if you need to re-open them.

The rest of this menu will be populated by all of the windows (excluding panels, like the Project Keywords window) that are currently open in Scrivener. Selecting from this list will bring that window to the front.

## A.12 Help Menu

The Help menu provides access to a menu search capability (which can be brought up from the keyboard with                



**Scrivener Manual** A quick link to the PDF that you are likely reading this from. The version that ships with Scrivener will be kept as up to date as possible, but newer revisions might also be available on the web site's [support page](#).

**Interactive Tutorial...** If you have not yet gone through the tutorial (you should!) this menu command will create a project designed to walk you through the process of learning the basics of Scrivener. You will be given the option of where to save it, and from that point on you can load it like an ordinary project. If you have already created the tutorial project, you can use this menu command to quickly load it again, so long as it hasn't been deleted or moved.

**Reset Tutorial** Use this menu command to reset an existing tutorial project to its factory state. It can be used while the tutorial is open or closed. In the former case, the old tutorial project will be closed and trashed, and you will then be guided through the process of creating a new one. If you use this command while the tutorial project is closed, it will merely trash the tutorial project and leave it up to you when to create a fresh copy.

**Video Tutorials** A handy link to our [video web page](#).

**List of All Placeholders...** There are many placeholders you can use with Scrivener, and this will provide a full listing of them in a floating window. You can copy and paste placeholders from this window into your project (or compile settings) as needed.

**Support** Jump to our [support web page](#). Here you can download the latest copy of the PDF (as well as the project used to create it), find contact email addresses, links to our forums, video tutorials, webinars, and more.

**User Forums** Jump to the official Scrivener forums where you can meet other authors around the world using Scrivener, share tips, report bugs, request tech support, or have a cup of latte in our off topic section.

**Release Notes** Jump to the official [release notes](#) web page on the web site.

**Literature & Latte Home** Jump to our [home page](#), where you will find access to everything else we offer on our web site.

**Scrivener Home** Jump to the main [Scrivener web page](#), where you will find useful download links for updates, links to share Scrivener with Twitter and Facebook, and more.

**Keep Up to Date...** Presents a form which you can use to submit your email address and name to subscribe to our newsletter. This is a low volume list that we use to send out important updates and news. Please take care



to whitelist “litereatureandlatte.com” in your spam filter, prior to submitting this form, as you will be sent a confirmation email which must be responded to before you will be subscribed. You can also click on the Twitter and Facebook buttons to visit our official social pages.

**Privacy Notice:** Your email address will registered with Campaign Monitor, whose services we use for sending out newsletters. Your address will otherwise never be shared with third-parties or sold to marketing lists.

**Purchase Scrivener...** Jump to our web store, where you can purchase Scrivener through our secure vendor (Paddle) and the other software or materials we have for sale.

| **Settings**

**B**

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## In This Section...

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### macOS 12 and older refers to Settings as Preferences

With macOS 13.0, Apple changed the global menu command from “Preferences” to “Settings”. This manual will now to refer to settings using the current terminology. For older systems, the menu command for preferences is **Scrivener ▶ Preferences....**

Like most applications, Scrivener installs in a “ready to use” state. The default Settings have all been carefully selected to present a cohesive and useful writing environment, and most of this manual will presume you are using them. That said, we know that a creative environment should bend to your working habits

as much as possible, and so there are a great many ways to tweak the look and feel of the interface.

This appendix will go over every setting and point you to any further discussions elsewhere in the manual if necessary.

Settings take effect as soon as you change them. If your screen is large enough, you can leave the Settings open to the side and tweak things until you get them looking and acting the way you want.

Beyond global application Settings, each project can be configured with further settings, which will be documented in Project Settings ([Appendix C](#)). Many project view settings are also exclusively set using the menus, or with buttons located within the project window itself.<sup>1</sup> These kinds of settings are rarely altered globally, but you can always create or modify your own project templates to achieve a preferred starting point for your new projects ([section 5.4](#)). Given how these sorts of settings are by nature scattered about contextually, they will be documented alongside the discussions on the features they pertain to, rather than in one central area.

### Get me back to the defaults!

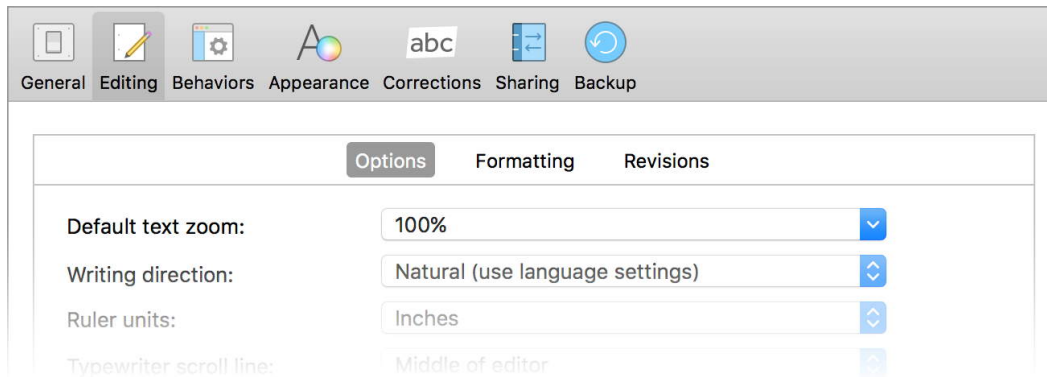
Feel free to experiment. Along the bottom of the Setting window you'll find a button labelled **Defaults**. This will perform a “factory reset”, returning all settings to their default states. This cannot be undone, but you will be warned after clicking the button and given a chance to cancel—you can also save your settings for later retrieval ([subsection B.I.I](#)). Most tutorials, books on Scrivener and even areas of this manual will assume default settings, so it can be a good idea to use them while you are following a guide. Many Settings can fundamentally change how the software works.

## B.1 Settings Organisation and Management

For ease in finding documentation on the setting you are looking for, this appendix will be organised in the same manner as the Settings panel itself. To get started, use the **Scrivener ▸ Settings...** menu command (⌘,).

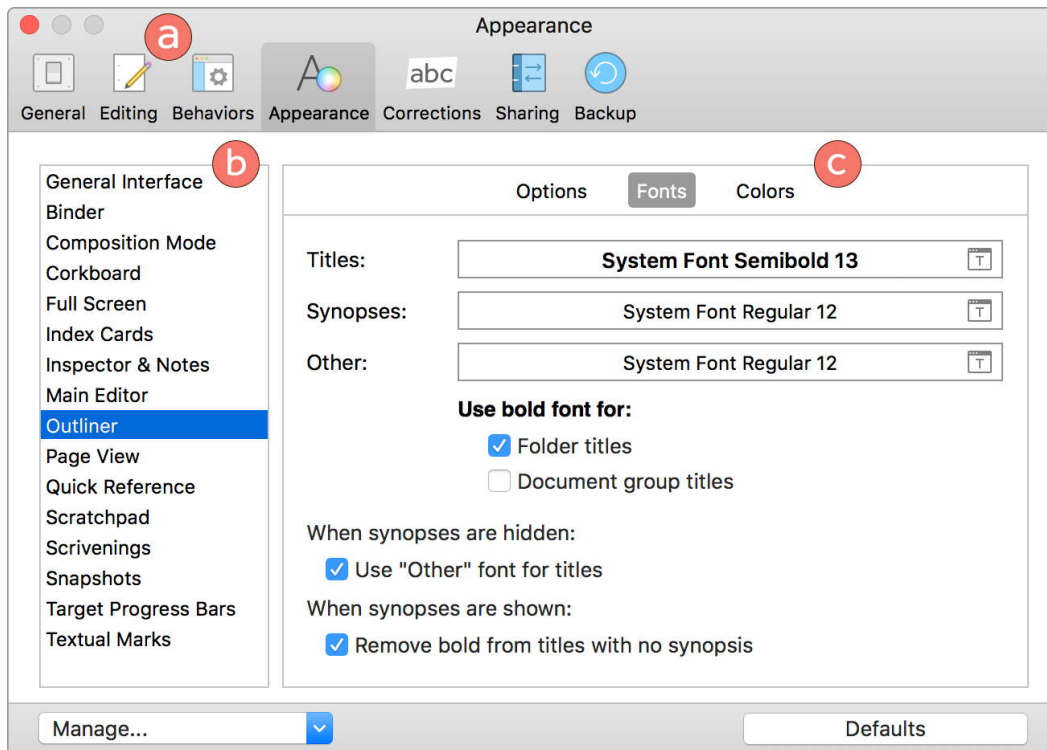
Along the top of the window are the major categories of Settings ([Figure B.I](#)). When we refer to settings panes by name, it will be by one of these sections, which you can access by clicking on the icon. In the figure, the “Editing settings pane” is selected. This is then broken down further into individual tabs—in this case the “Options” tab is selected. We would refer to this as the “Editing: Options

<sup>1</sup> A good example is whether or not label colours are displayed along the side of index cards on the corkboard. By default they are, but you can turn them off for a project and it will remember that setting.



**Figure B.1** The “Editing” category is divided into three sections as tabs.

tab”, wherein one can change such things as the **Default text zoom** setting, used in most places where text can be edited.



**Figure B.2** The “Appearance” pane uses up to three levels of organisation.

In [Figure B.2](#) we have a more complex layout, where the major section chosen along the top (a) is “Appearance”, which has many subsections listed along the left (b). The contents of these subsections will be displayed to the right, and can sometimes be broken down further into tabs (c). We would refer to this as the “Appearance: Outliner: Fonts” tab.

### B.1.1 Settings Presets and Themes

Along the bottom left edge of the Setting window you will find a **Manage...** button with a dropdown menu containing several options available for organising or backing up your settings, as well as access to any presets you have installed. This can be particularly useful if you work on more than one computer, and in the case of themes, to switch up your working environments between favourite sets of colours and even fonts.

**Load/Save Settings as Preset** Presets are a convenient way to store different Setting sets. In cases where you need to use varied settings for different projects, this will make it easy to switch sets on the fly. Use the **Save Settings as Preset...** option to save all current Settings into a preset under the name you provide. Once saved, this preset will be available from the **Load Settings from Preset** submenu.

If you wish to update an existing preset: make any changes you see fit, then use the save command, specifying the name of the preset you wish to overwrite. You will be asked for confirmation before the old preset file is overwritten.

**Delete Preset** The Setting preset you choose from this submenu will be deleted from your support folder. This cannot be undone, so you will need to confirm your decision.

**Load/Save Settings from File...** Save your Settings to an external file for either backup purposes, or to synchronise your settings between multiple computers. Settings can be loaded from these files, replacing all current settings.

**Load/Save Theme** Themes differ from Setting presets in that they only save and load appearance settings, such as interface colours, corkboard and outliner appearance and fonts. The types of settings that will be saved into the theme can be chosen in the Save Theme dialogue.

**<macOS 10.14+>** When selecting a theme designed for Dark or Light Mode, you will be asked if you wish to apply the theme and switch Scrivener to that mode of appearance, if relevant. Dark Mode themes will be indicated with a moon icon to the left of their name.

Themes can be most easily loaded from the main **Scrivener ▶ Theme ▶** submenu.

**Delete Theme** The selected appearance theme will be deleted from your support folder. This cannot be undone, so you will need to confirm your decision.

**Load/Save Theme from File...** Load a theme from a file you have stored on your machine. This will not install the theme into the menus above, but rather



simply apply its settings to your current Settings. Use the **Save Theme...** command if you wish to save them for future use.

Themes as files can be useful for synchronising appearance settings between computers, without changing all of their Settings, sharing your theme settings with others, or loading theme settings you've downloaded from the Internet.

[Return to chapter](#) ↗

## B.2 General



**Figure B.3** The General settings pane

General Settings govern the application's basic behaviour; its integration with other programs, whether it should check for updates, designating global folders (such as the scratchpad) and how appending or merging text with existing documents should be performed.

### B.2.1 Startup

**Reopen projects that were open on quit** When launched, projects that were left open when you last quit will be automatically reopened, bringing you straight back to what you were last working on. This behaviour does not apply when launching the software by loading a specific project from your file manager.

Hold down the **Shift** key while launching Scrivener to temporarily suppress this behaviour and open the software without any projects opened.

**Show template chooser when there are no projects open** Toggles the automatic display of the start panel, for the creation of new projects ([subsection 5.1.1](#)), when all project windows have been closed, or if the software loads without any projects to open

**Reopen Quick Reference panels when opening projects** Ordinarily, Quick Reference panels ([section 12.6](#)) are session based—when their related project is closed they will not be reopened the next time you load the project. While enabled, all projects will remember any Quick Reference panels left open and reopen them automatically when the project is loaded.

**Automatically check for updates** If this is enabled the software will periodically check the website to see if there is a newer version available and, if so, will ask you if you want to update. Note that if you do not have this enabled, you can still check for updates yourself by using the **Scrivener ▶ Check for Updates...** menu command. The dropdown menu beside this option governs how frequently Scrivener will check for new versions.

## B.2.2 Saving

**Auto-save after *n* second(s) of inactivity** Scrivener automatically saves changes made to projects as you work, but so that it is not constantly saving—and to avoid any slowdown and interruption to your work that might cause—it will wait until you stop interacting with the program for more than two seconds (by default). Adjust this if the two second default conflicts with your natural rest-work cycle and causes halting when you try to resume typing.

If you increase the period significantly, so that it rarely triggers, be sure to use **File ▶ Save** regularly to keep your work saved. Scrivener will always auto-save when you close a project.

**Take snapshots of changed text documents on manual save** This option will cause the project to snapshot all text items ([section 15.8](#)) that have had their main text content altered since the last time you saved, with the **File ▶ Save (⌘S)** command, within the current session. Auto-save will never trigger this behaviour, nor will closing the project.

Snapshots that have been automatically generated in this way will have their name set to “Untitled (Save)” to differentiate them from any “Untitled” snapshots you take yourself manually. They can consequently be easily searched for and periodically purged from the project using the Snapshots Manager ([section 15.8.5](#)).

**Show notifications when saving in composition mode** Register an alert through Notification Center whenever you manually save the project in Composition mode, as there would otherwise be no indication of when save completes.

## B.2.3 Author Information

This information will be used for filling in placeholders in project templates (for example, some templates generate cover sheets for you) compile placeholders such as `<$author>` as well as metadata fields, and when creating inspector comments. Individual projects can also use specific pseudonyms or other details, set up in the Metadata Options area of the compile overview screen ([section 13.5](#)).

## B.2.4 Services

Options for how Scrivener’s global clipping Services should work. For more information on available services, read Scrivener Services ([section 9.3](#)). For the least amount of intervention, set both of these options to off.

**Bring Scrivener to front when using Services** Choose between active and passive clipping. When this is checked, clipping from other applications will be active in that it brings you back to your project after you’ve clipped some text from another application. When unchecked, it will work passively, keeping the project in the background and allowing you to continue work in other programs while you add material to the project.

**Show title prompt when using clipping Services** Normally, when you use a service that requires the creation of a new item in the binder, you will be asked what you wish to call it. When unchecked, this option will defer that task until later, when you are ready to think about names.

## B.2.5 Language

**Interface Language** By default, Scrivener will attempt to select the appropriate interface language based upon your system settings. If this does not work, or you would like to use another interface language directly, you can use this setting to manually adjust the language. This setting has no impact on the production of information that is controlled by system localisation, such as date stamps and auto-number placeholders.

Use the “System Default” selection to return the interface to the macOS system default.

**Linguistic focus uses Spanish-style dialogue** When using the Linguistic Focus ([subsection 20.3.2](#)) feature to filter for direct speech, in addition to speech mark punctuation detection (as set in the System Settings: Keyboard pane, by clicking the Edit button alongside your input source), Scrivener will also scan for lines that begin with an em-dash—a form of dialogue marking that is common in Spanish-speaking regions.

This setting will also look for text found within angle-bracket style speech marks, even if System Settings is not set to use that punctuation style for typing. Even if you do not use em-dash style dialogue, this may be useful if you use both angle-bracket notation and whatever quotation is standard to your smart quote settings.

## B.2.6 Scratch Pad

**Hot key** Sets the global hot key for showing or hiding the Scratchpad Panel ([section 9.4](#)). Since this key will be accessible from any application on your

Mac, you might need to change this setting if it is conflicting with another application you use.

To clear the shortcut entirely, click the — button.

**Notes location** Your scratchpad notes are stored on the disk using normal text files. This option lets you choose where those files will be automatically saved and loaded from. By default, they will be stored in your Documents folder.

If you select a synchronised folder, such as Dropbox or iCloud Drive, you can effectively create a universal scratchpad that every machine you use Scrivener with can access and share, or even jot down notes from a mobile device using other software entirely.

**Default format** This setting impacts which file format to use for new notes created from within the scratchpad. For the plain-text format, you can supply a custom file extension in the **ext** field. This can be useful for Markdown-based formats.

Files saved into the folder from external sources will be editable in the scratchpad window and remain in their original format. You can thus mix rich text with plain-text notes if you desire.

If you use Scrivener for both Windows and macOS, and intend to share your notes cross-platform, do not use the Mac's default RTFD option, as this format cannot be read on other platforms.

## B.2.7 Shared Templates

**Shared templates folder** Click the **Choose...** button to define the location on your disk where Scrivener will check for files to be used as globally accessible document templates. For more information on the usage of this feature, refer to Shared Templates on the Disk ([subsection 7.5.3](#)).

Click the **Clear** button to reset the folder, removing this feature from the software. The **Open shared templates folder...** button will load the folder using Finder.

## B.2.8 Citations

**Bibliography Manager** Scrivener can integrate with several popular bibliography management programs. Click the **Choose...** button to select your preferred manager from the Applications folder. The **Reset** button will clear your choice.

**General purpose usage**

This merely links which application will launch with the **Insert ▸ Bibliography/Citations...** menu command.. If you do not use a citation manager, but frequently use another program along with Scrivener, you could use this feature to quickly launch or switch to that program.

## B.2.9 Separators

**Text Separators** This table lets you adjust how Scrivener will combine individual texts when certain actions bring them together. In all cases, you have three choices of divider available:

1. *Single Return*: inserts a single paragraph break between selections. If two paragraphs appear together, there will be no whitespace between them, save for any paragraph spacing in use.
2. *Empty Line*: a full empty space will be inserted between selections. If you prefer or require working with double-spaced paragraphs, this is the option you will want to use.
3. *Custom*: lets you type in a custom separator. If you wish to insert carriage returns along with the custom separator, use **⌘Return** to do so.

Separators are used in the following four cases:

1. *Merged documents*: determines how documents will be merged when using the **Documents ▸ Merge** command. Note that this setting only affects the main text. The inspector notes and synopses of merged documents will always be separated by a double newline.
2. *Append clippings service*: when using the global “Scrivener: Append to X” services, clippings will be separated from any existing text by your choice here.
3. *Append selection*: when selecting text and using the **Edit ▸ Append Selection to Document** command, the selection will be separated from the existing text by this option.
4. *Scratchpad notes*: when appending text to documents from the scratchpad, incoming text will be separated from existing text by this option.

## B.2.10 Automatic Quit

**Automatically quit after a period of inactivity** If the software has been left alone for a determined amount of time it will be shut down normally,

meaning all open projects will be closed and backed up (by default). This can be of use if you tend to leave the program running unintentionally, and wish to access these projects from another machine using a cloud service. Ordinarily if you accidentally leave a project open it would be unsafe to open them a second time. This feature ensures that after a period of time they will be closed, so long as the computer is still running during that period of time.

**Quit after inactive for  $n$  minute(s)** Set how long to wait before shutting down the software in minutes.

### B.2.11 Warnings

**Show internal error alerts** If the software is crashing or odd behaviours have been disrupting your work, you can tick this checkbox and restart the software to enable debugging mode. If during the course of using the software an error is encountered, it will be displayed in a window where you can describe what you were doing recently and send a report to us. At this point it is generally a good idea to restart the software.

**Reset All Warnings** When you first start using Scrivener, actions which have a destructive or unusual nature (such as importing in such a way that original formatting might be lost) will produce a warning dialogue. You can often choose to disable these as you see them from within the warnings themselves. The Reset All Warnings button will clear all of these dismissals and make them appear again the next time it is appropriate.

Click this button to reset all of the various warnings that can be permanently dismissed, throughout the software, so that they will be shown again.

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## B.3 Editing



**Figure B.4** The Editing settings pane

The options for the main text editor control most aspects of how text is displayed, how the editors work, the default font and paragraph formatting for new documents, footnotes and other notes and finally the colours used in revision mode. For options pertaining to text input and typography, see the Corrections

settings pane ([section B.6](#)). The Appearance settings pane will also contain numerous options for how the editor itself looks, and some aspects of how textual markings, such as how hyperlinks are formatted ([section B.5](#)).

### B.3.1 Options

**Default Text Zoom** Dynamically scale the size of the text font in various text views. As is typical for word processors, zooming will not impact the underlying font settings. This setting impacts the main text editors, the inspector notes and bookmarks preview area, Quick Reference panels (and the inspector panels within it), footnotes & comments and copyholders.<sup>2</sup> The setting will not alter editing areas that you have already adjusted or have established settings within. For example if you change the setting to 300% and then open an older project, the project will use go on using the previous zoom setting, but if you open a Quick Reference panel from that project it will use 300%, because these panels are created as needed. Furthermore, most areas of the interface can be zoomed independently, and will remember their individual settings.

**Writing direction** In most cases, you will want to use the “Natural” setting, which is set up depending on your default system language. This should go from right to left, or left to right, automatically. You can also manually override individual paragraphs as well with the **Format ▶ Paragraph ▶ Writing Direction** submenu. Authors working in both Arabic and German, for example, will probably want to leave this setting at Natural and change individual paragraphs as needed.

**Ruler Units** Choose between the common units of measurement (centimetres, inches, picas, or points) used throughout the software.

**Typewriter scroll line** Typewriter scrolling mode keeps the line you are currently typing in fixed to a certain position on the screen. This setting lets you adjust the vertical point where the line will be positioned, with the default being in the middle of the screen.

**Typewriter scrolling always jumps to scroll line** By default, when typewriter scrolling is enabled and you start typing in another line, it will adapt to using the current line as the scroll point. With this option enabled typewriter scrolling will become strict, and always reposition the current line to a fixed point.

Read more about typewriter scrolling ([section 16.3](#)).

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<sup>2</sup> Composition mode uses its own independent zoom setting, described in the Appearance: Composition Mode: Options pane ([section B.5.3](#)).



**Smart copy/paste** When enabled, this cleans up the whitespace left behind when cutting text, and when pasting text it will ensure that words have a space on either side as appropriate. Disable this feature if you prefer cutting and pasting to only use precisely what you selected.

**Typing clears search highlights** When the binder sidebar is displaying a search result, text views will highlight any text matching the search term. When this option is enabled, the highlights in the current editor will be temporarily removed as soon as you start typing. They will be restored when you revisit the document in the future.

**Use hyphenation** Enabling hyphenation when using full justification can increase readability but at the expense of not being as “pure” to the actual text you have keyed in (the hyphens will not be literally placed into the text; they are only drawn on in real-time to improve word-spacing flow on a line). Consequently this is off by default.

This feature uses your system localisation Settings to determine optimum hyphen placement. If you are writing in another language and getting odd results, make sure your OS is set up accordingly.

**Avoid widows and orphans in page view** Attempts to keep page breaks clear of widows & orphans, when using Page View mode in the main editor. This option may slow down Scrivener when editing large amounts of text.

**Use fine kerning** Uses a higher-quality text rendering model which reduces known screen artefacts, such as “text wobble” while typing, and ugly kerning at odd-number zoom settings. Disable this feature to marginally increase performance, if necessary.

**Live counts show...** Determines which units of measurement to display in the editor footer bars, where statistics about your text is printed as you write. The “Pages” setting will only take effect when **View ▶ Text Editing ▶ Show Page View** is enabled in the project.

If all checkboxes are disabled then no live statistics will be shown. You will still be able to click in the middle of the footer bar area to bring up the extended statistics popover.

**Do not color the text of inline notes (faster)** Inline annotations will be drawn with a shaded background set to the colour of the annotation, rather than changing the colour of the text. If you use a lot of annotations in your text and find the text editing slows down, this option may increase performance.

When this option is enabled, the effective tool for changing annotation colours ([section 18.2.1](#)) will be the highlighter, instead of the text colour tool. However Scrivener will intelligently set the highlight colour if you use the shortcut to bring up the system colour palette (⇧⌘C).

**Terminate footnotes before punctuation** Some typesetting styles call for footnote markers to be placed before the terminating punctuation for a sentence, rather than after it, or for when individual words are referenced rather than the entire sentence. Select this option if you require this format. You can always manually define where the marker will be placed by selecting the range of text you wish to comment on, prior to making the note. This only alters the behaviour used when selection is made automatically in lieu of a selection.

**Open comments in inspector if possible** When this option is disabled, and the inspector sidebar is hidden, notes will open in a popover right over the text in the main editor. When enabled, the inspector will be revealed if necessary and switched to the Footnotes & Comments pane to show the content of the note you clicked on. Refer to Popup Notes ([subsection 18.3.6](#)) for more information.

**Disable insertion point blinking** When enabled, the cursor will be always visible on the screen rather than blinking on and off.<sup>3</sup>

**Use block insertion point in...** Set the width of the insertion point from its default of 1 pixel, increasing its visibility.

**Block insertion point width** Set the width of the cursor in pixels. With variable-width fonts (like the default), this setting can produce odd results where the cursor sometimes overlaps thin characters like punctuation marks. It is best used with a fixed-width font like Courier, or with a narrower setting like two or three pixels.

## B.3.2 Formatting

These settings determine how *new* documents and typed in text will formatted. They will not adjust the formatting of text you have already created, in any projects, so you needn't worry about these settings destroying your existing formatting.

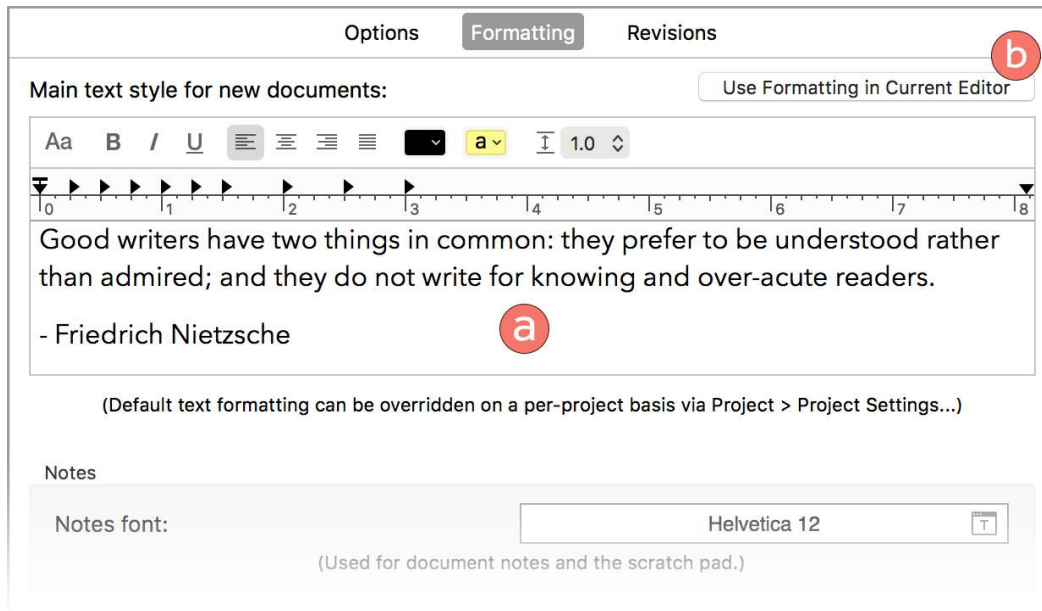
Some of these settings can be adjusted per project ([section C.5](#)), in a way that will override these settings.

### Main text style for new documents

The top half of this pane (marked (a) in [Figure B.5](#)) is dedicated to setting up the default font, character attributes and paragraph formatting for new text documents (files and folders). You will have access to the full standard ruler settings, as well as font controls via the fonts button (the **Aa** button on the far left of the

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<sup>3</sup> This and the following two capabilities have been removed in macOS 13 & 14, on account of a new system cursor that no longer supports customisation.



**Figure B.5** The Editing: Formatting settings pane is where you establish default fonts for your writings.

format bar). All changes you make here will be immediately previewed against the provided sample quotation.

If you already have a paragraph set up the way you would like all future documents to appear:

1. Place the cursor in the sample paragraph.
2. Use the **Format ▶ Make Formatting Default** menu command.
3. Alternatively, open the Editing: Formatting settings pane and click the **Use Formatting in Current Editor** button, marked (b) in the figure.

## Notes font

Establishes the default font and font sized used by all newly created document notes. As with the main text editor, if you change this setting later on old notes will remain as they were formatted before.

## Comments & Footnotes

**Inspector comments font** Sets the default font for inspector comments. Since these fields are rich text, this setting will only impact newly comments. This setting will also be used by inspector footnotes unless you modify the following setting. Inline annotations will always take on the styling of the text around them.

To update existing comments and footnotes to the defaults established here, refer to Resetting Linked Note Formatting ([subsection 18.4.2](#)).

**Different inline footnotes font** When enabled, the font and font size within newly created inline footnotes will use this setting.

**Use inline footnotes font for inspector footnotes too** To use this alternate font for newly created inspector footnotes as well, enable this option.

**Set Styles Defaults...** Click this button to have the software use the current project's stylesheet (you can review that with the **Format ▸ Styles ▸ Show Styles Panel** menu command) for all newly created projects. Alternatively, if you would prefer to return to the stock defaults that ship with the software, then click the **Reset to Defaults** button in the subsequent dialogue box. To take no action at this time, click the **OK** button in the dialogue.

### B.3.3 Revisions

The colour choices made here establish how revision mode will appear when typing in new text or using overstrike to schedule text for deletion. For each level, click the colour tile to the right to open the colour palette.

**Use revision colors in notes** By default if you click into the inspector and add notes to a document or folder, the current revision level will be respected. Disable this option if you'd rather only track revision markings in the main editors (which includes the Bookmarks editor in the inspector).

#### Keep revision markings consistent

It is important to consider that the revision feature solely uses text colour formatting (of the same sort you can apply yourself by hand) to establish the revision level of text. Once changed from previous colours, Scrivener will no longer recognise existing coloured text as being a part of a revision level, even if the feature was used to key in that text in the past. It would be best to pick a set of colours you prefer early on and then stick with those colours, at least until you transition to a new project. This also means that if you intend to collaborate with others and use this feature, you will all need to be using the same set of colours.

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## B.4 Behaviors

### B.4.1 Composition Mode

These options affect the behaviour of the distraction-free Composition Mode ([section 16.1](#)).



**Figure B.6** The Behaviors settings pane

**Open composition mode on...** If you have more than one monitor attached to the computer, the composition writing interface can be opened on a designated screen. The default “Current Screen” option refers to whichever screen the project window is located within. Scrivener supports configurations with up to four physical screens.

**Blank out other screens** When using more than one display, select this option to reduce distractions from the other monitors. This merely draws the background colour over the screen, and thus the monitor’s energy saver will not kick in, so this is only useful if you’d rather not turn off your monitor.

**Open composition mode in its own Space** Use macOS’ native full screen feature to isolate composition mode on its own Space. The advantage of doing so is that Notifications can be displayed while you are writing, whereas the standard “presentation mode” suppresses even those notifications coming from Scrivener, letting you know when you have met your daily writing goals and so forth. The disadvantage is being unable to multitask, so using Dictionary to look up words will mean having to switch to a different Space.

**Fade between modes** Gracefully fades the screen between composition mode and regular editing mode.

**Hide main window in composition mode** Check this to hide the main window during composition. If this is unchecked, you can see the main window beneath the translucent areas of the composition background (which can be controlled with the **Background Fade** slider). When using multiple displays, you can also have the main window visible on another screen. Checking this so that the window is hidden means that you could use the translucent areas of the background to look at the contents of the windows of other applications.

In some circumstances, having the main window visible in composition mode can slow down typing, so it is usually best to leave it hidden.

**Escape key closes composition screen** When disabled, you will need to use either the **View ▶ Exit Composition Mode** command or its keyboard shortcut (**⌘F**) to toggle between modes.

**Dock Hiding** By default, composition mode will force the Dock to be hidden even if you move the mouse over to the edge of the screen where it would

appear. Since the Dock ordinarily appears along the bottom of the screen, it can get in the way of the control strip used to adjust composition settings. However if you place the Dock along the left or right edges of the screen, setting this to “Automatically hide and show Dock” will grant access to it. You will need to re-enter to composition mode for this change to take effect.

## B.4.2 Document Links

This pane adjusts how internal document links and linked images function within the software. You can change what happens when you click a link, and whether or not back-links are created for you automatically. Read more about Linking Documents Together ([section 10.1](#)).

**Document links and bookmarks create back-link bookmarks** When you create document links or bookmarks to other items in the binder, Scrivener will automatically place a “back-link” to the originating document in the Bookmarks inspector tab for the target ([section 13.4](#)). For example, if you link *from* “Scene 81” to a character sheet named “Maria”, then “Scene 81” will be bookmarked from the “Maria” document. In this way, every cross-reference you create will become a circular link. If you would prefer to maintain all of your bookmark lists by hand, disable this option.

**Image links create back-link bookmarks** In the same fashion as the above, inserting a linked binder image into a text editor ([section 15.6.4](#)) within the same project will establish a bookmark from the image to the document that uses the image.

The following settings impact how links and bookmarks load their targets within (or even outside of) the project window. The default settings strive to preserve the content that is loaded into the text editor the link was activated from (including from the inspector), by either using split views or Quick Reference panels. The three different link actions all feature the same core options to choose from:

- *Current Editor*: loads the item into the active editor, acting more like a web browser—and as with a browser you can get back to where you linked from with the Back button above the editor, or ⌘[.
- *Other Editor*: the linked item will be loaded in the other split, splitting the editor if necessary to do so.
- *Quick Reference Panel*: the clicked link will open in a new window, thus preserving the current working environment in the project window.
- *Copyholder*: the linked item will load in the current editor’s Copyholder, opening one if necessary to do so.



Refer to Using and Managing Links ([subsection 10.1.2](#)), for more information on how links can target different views on the fly.

Some contexts will always use Quick Reference panels when it is not logical to follow your behaviour Settings. For example in Composition mode, there is no “other editor”, and likewise if you click on a link to a picture it cannot edit or view that picture.

**Open clicked document links in...** Linked items will be loaded as established with this setting. It applies to all of the areas within a project window that can store clickable hyperlinks in the text, as well as the behaviour for external links that load individual binder items ([subsection 10.1.6](#)).

**Open new document links in...** Determines what will happen after a new document is created as a result of inserting a hyperlink via the **Edit ▶ Link to Document ▶ New Link...** menu command (**⌘L**) or the optional wiki link style ([section 10.1.1](#)). This behaviour does not impact the creation of hyperlinks to *existing* binder items. It also has a special setting beyond the core choices: “(Do not open)”, which causes links to new documents to behave just like links created to existing documents: you will be able to continue writing in the context where the link was created from without interruption.

**Open Inspector bookmarks in...** When pressing the **Return** key on a selected bookmark in the inspector, or double-clicking on it, it will be loaded in accordance with your setting here. This only refers to the bookmarks themselves in the upper half of the bookmarks tab ([section 13.4](#)). The editable preview area in the lower half will use your main setting for how clicked document links should behave, above.

### B.4.3 Double-Clicking

**Double-clicking on the corkboard background** A couple of optional actions can be assigned to the background of the corkboard itself, when double-clicking on it:

- *Opens the parent corkboard*: navigates the editor “upward” in the outline hierarchy to display the parent of the current corkboard. If the corkboard you are viewing is already at the top level of the binder, it has no parent and nothing will happen. This action can also be performed with the **Navigate ▶ Go To ▶ Enclosing Group** (**⌘R**) menu command.
- *Creates a new card*: follows a common behaviour amongst diagramming and mind-mapping applications, where you can indicate the position of a new card by double-clicking with the mouse.
- *Does nothing*: the default setting. Double-clicking will be ignored.



**Always creates a new card in freeform mode** By default, when using the freeform corkboard ([subsection 8.2.4](#)) mode double-clicking will always create a new index card under the mouse pointer when double-clicked. Uncheck this to have freeform corkboards follow the behaviour of the above setting.

**Always creates a new card when arranged by label** As above, this default behaviour applies when using the Arrange by Label ([subsection 8.2.5](#)) corkboard mode.

## B.4.4 Dragging & Dropping

**Option-dragging creates duplicates** When enabled, hold down the **Option** key while dragging items to create copies of those items to the location where you drop them, rather than moving the items. This impacts any case where you can drag and drop an item icon, or a selection of items, into the binder sidebar, corkboard or outliner—thus it even applies to dragging from bookmark lists, the editor header bar, QuickReference panels and so forth.

**Collapse auto-expanded outline items after drag and drop** Dragging items in the binder or outliner, and pausing over a collapsed container, will reveal its contents so you can drop items several layers deeper than you could initially see when you started dragging. This option will close containers expanded this way, once you have dropped the item(s).

**Allow drop ons in corkboard** When enabled, allow the dropping of index cards on top of other cards to move them as child cards beneath them. This action is similar to dragging and dropping items on top of other items in the binder or outliner.

**Link to images dragged from binder into editor** By default, images dragged from the binder into a text editor will drop a link to the original image. If the original image is modified the changes will show up in the editor after a reload of the project. This is synonymous with the the **Insert ▶ Image Linked to Document ▶** submenu ([section 15.6.4](#)).

When disabled, images will be fully imported into the text itself, creating a copy of the original image.

**Delete text dragged to other areas** By default, when dragging text *from* any of the following editor contexts, the dragged text will be *moved* to the drop point in the same way text would be moved when dragging it from one position to another within a single editor. With this option disabled, text will be copied to the drop location instead, leaving the original text untouched. This option has no affect on the behaviour of dragging text within a single editor, but it will adjust the behaviour used when dropping text into the binder sidebar, corkboard or outliner views.

- The main text editor splits.
- The Document Notes inspector tab.
- The Bookmarks preview pane.
- Quick Reference panels (and their applicable inspector panes).
- Copyholders.

### B.4.5 Folders & Files

Concerns the treatment of file and folder items in Scrivener, particularly in how their behaviour in the project interface differs, including options for negating these differences.

**Treat all documents with subdocuments as folders** When this is checked, any document type at all that has subdocuments will act like a folder in all ways. If this isn't checked, normal text documents or media files that have subdocuments (any type of document can act as a "container" for other documents in Scrivener) will be opened in single text mode.

This setting has broad implications throughout the interface. For example the following options that refer to modifying how folders work will now also apply to file groups. It is a safe assumption that if a thing works a certain way with folders, with this option enabled that thing will also hold true for all containers. Consequently we will not list all of the ramifications here, but will make note of where it does have an impact when discussing the features themselves.

**Include enclosing folder text in scrivenings mode** When clicking on a container, by default the text contents of that container will be included in the Scrivenings session at the very top. If you never use folder text then disabling this will remove the empty entry at the top of the Scrivenings session.

**Show folder text when selected from search results** Enabled by default: when clicking on folders in search results, the editor will display text content for that folder, rather than revealing their children in accordance with the preferred view mode. Generally speaking, most search results are based on the *text* of the matching item, not its descendent items, and so the reason the item is in the search list at all might likely be in any text stored in the folder, which a corkboard or outliner might obscure.

If desired, you can always switch back to a group view mode manually once you've loaded the search result in the editor.

**Always create new items as siblings** This option overrides the default behaviour by causing all newly created items to be created at the same level

as the selection. The only exception is when one of the three special root folders are selected. By default, if you select a folder and create a new text or media document, it will be placed inside that folder as a child item.

Refer to Figuring Out Where Things Will Go ([section 6.3.1](#)) for more detail on how Scrivener places new items.

**Always set title of new items** By default the software will attempt to respect where your cursor is, when creating new items. If you are typing in the editor, and press the shortcut (**⌘N**) to create a new text item, the result will be you typing text into the new document immediately.

This setting will cause Scrivener to move your cursor into the binder when you create a new item, so that you can type in a name for it right then and there. If the item cannot be displayed in the binder, whether because it is closed or the sidebar isn't showing the location where it appeared, then normal default behaviour will be used.

## B.4.6 Navigation

**When focused editor is locked in place...** By default, if you have the editors splits and lock one of them, the behaviour of Scrivener will change. Ordinarily the binder sidebar will only ever impact the targeted split, but when the target split is locked the binder will load clicks into the *other* split.

Change this setting to **Binder selection does nothing** if you would prefer split targeting to remain literal and simply do nothing when the targeted split is locked.

**Automatically load web pages in bookmarks preview** Bookmarks to web sites or other online resources will require you to click a button to load them within the inspector pane. This way as you switch through documents in your draft or browse through the bookmark list, you will not automatically be downloading websites. If you would prefer otherwise, enable this option.

**Allow limited navigation in web pages** Hyperlinks found within archived Web files, as well as those displayed in the Bookmarks preview pane, will attempt to navigate within the same view, rather than sending the URL to your default browser.

Scrivener is not a dedicated browser, and will not have the same level of protection and security that a browser does. As with the above option, take care when using any feature that downloads raw data from the Internet.

Use the **Option** key to temporarily override this setting per click.

**Space key opens selected document in...** The **Spacebar** can be used to quickly open selected items in the corkboard and outliner views. By default this

opens the item in the editor, replacing the current view (synonymous with the `⌘O` shortcut). If you would prefer it to match the binder behaviour, change this to “Quick Reference Panel”.

### B.4.7 Outliner

**Disable live row resizing** The height of the row will not be adjusted until after you have committed your edits. If the language you use in Scrivener’s interface causes the outliner to malfunction, when the height of the row changes, then enable this option.

### B.4.8 Playback

**Rewind when paused by...** Use the slider to set how many seconds Scrivener should rewind the media stream back, when using the Auto-Rewind ([section 8.1.3](#)) feature.

**Media time stamp format** Establishes the time stamp format used by the **Insert ▶ Media Time Stamp** menu command. If you are writing subtitles for example, you might wish to use HH:mm:ss.SSS. If you are looking for other tokens to use than the few basic ones we have provided in the help text, visit the [datestamp format reference](#)<sup>4</sup> web page.

### B.4.9 Return Key

Scrivener’s binder, outliner and corkboard views treat the **Return** key in a fashion more like a dedicated outliner or mind-mapping tool might do. If you find this gets in the way of how you work, these options can tune how it works.

**Ends editing synopsis in corkboard and outliner** By default, the **Return** key will commit edits made to the synopsis in the corkboard and outliner. To add carriage returns to the synopsis, use `⌘Return`. If this is unchecked, the **Return** key will add carriage returns, and you will need to use **Esc** to submit changes.

**Creates new item in list, outline and corkboard views** Pressing the **Return** key (when not editing the title or synopsis) will create a new item in the outliner, binder and corkboard as well as in certain list views (such as the keywords list). Disable this if you would prefer the creation of new items to require specific commands or the clicking of buttons.

**Show elements list on double !return in script mode** Mirroring popular scriptwriting software, if you press **Return** on an empty line then the

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<sup>4</sup> [https://www.unicode.org/reports/tr35/tr35-dates.html\#Date\\_Format\\_Patterns](https://www.unicode.org/reports/tr35/tr35-dates.html\#Date_Format_Patterns)

software will provide a list of elements you can choose from, to format the current line. Disable this option if you need to insert empty lines into your script.

### B.4.10 Snapshots

**Play shutter sound when snapshots are taken** Disable this setting to remove the audible camera shutter cue that is played when you take a snapshot. This sound will not be played when automated snapshots are taken (such as when using folder sync).

**Show notification when snapshots are taken** Enable this option to display a message on the screen when snapshots have been taken. Given how notifications may also play a sound of their own, you may want to disable the above option as well.

[Return to chapter](#) ↗

## B.5 Appearance

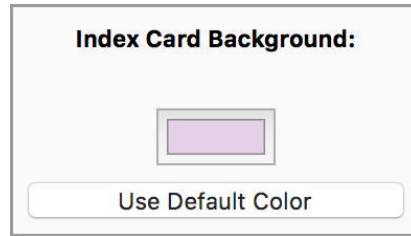


**Figure B.7** The Appearance settings pane

Most Settings relating to the colours, fonts and how various parts of the program react to view settings will be determined in this section. Each subsection may contain options, fonts or colours, organised into tabs within their respective panes. We will break down these by section for your convenience.

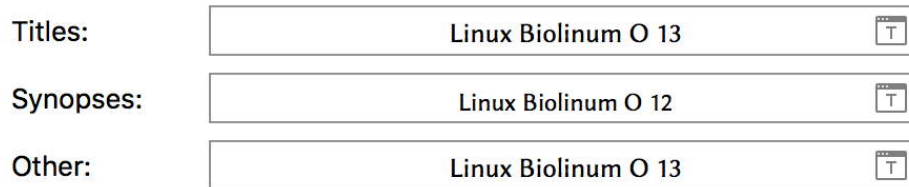
There are many areas of the user interface that can have their colours modified, all organised into the sections of the Appearance panel most relevant to them. If you want to change a particular area of the window, look for its rough category in the left sidebar, click on the “Colors” tab, and then select the component from the list within this tab. The colour swatch in the middle of the setting area should be clicked to bring up the colour chooser ([Figure B.8](#)). Individual colours can be reset to default by clicking the **Use Default Color** button below the swatch.

Where fonts can be chosen, a rectangular button with the currently selected font (and often the font size as a numeral as well) printed inside of it, with a special “T” icon on the right-hand side to indicate this type of control ([Figure B.9](#)). You can click anywhere within the rectangle to bring up the font chooser. Some font settings allow access to the “System Font” type, even though Apple hides this font from you in the chooser. Where applicable, you will find a dropdown



**Figure B.8** Click the colour swatch to change the “Index Card Background” option.

menu added to the bottom of the font chooser. Once the base system font type is chosen, you can use the font size controls, even though you will not be able to see the font selected in the main area above.



**Figure B.9** Click within the rectangular area where the font name is printed to select a font.

### Can I save themes?

Setting up colours can be a lot of work. If you’d like to save your settings to share with others, or just to keep a copy in case you want to use another theme for a while, be sure to check out Settings Presets and Themes ([subsection B.1.1](#)).

## B.5.1 General Interface

These options affect the overall project window reacts to a few different appearance settings.

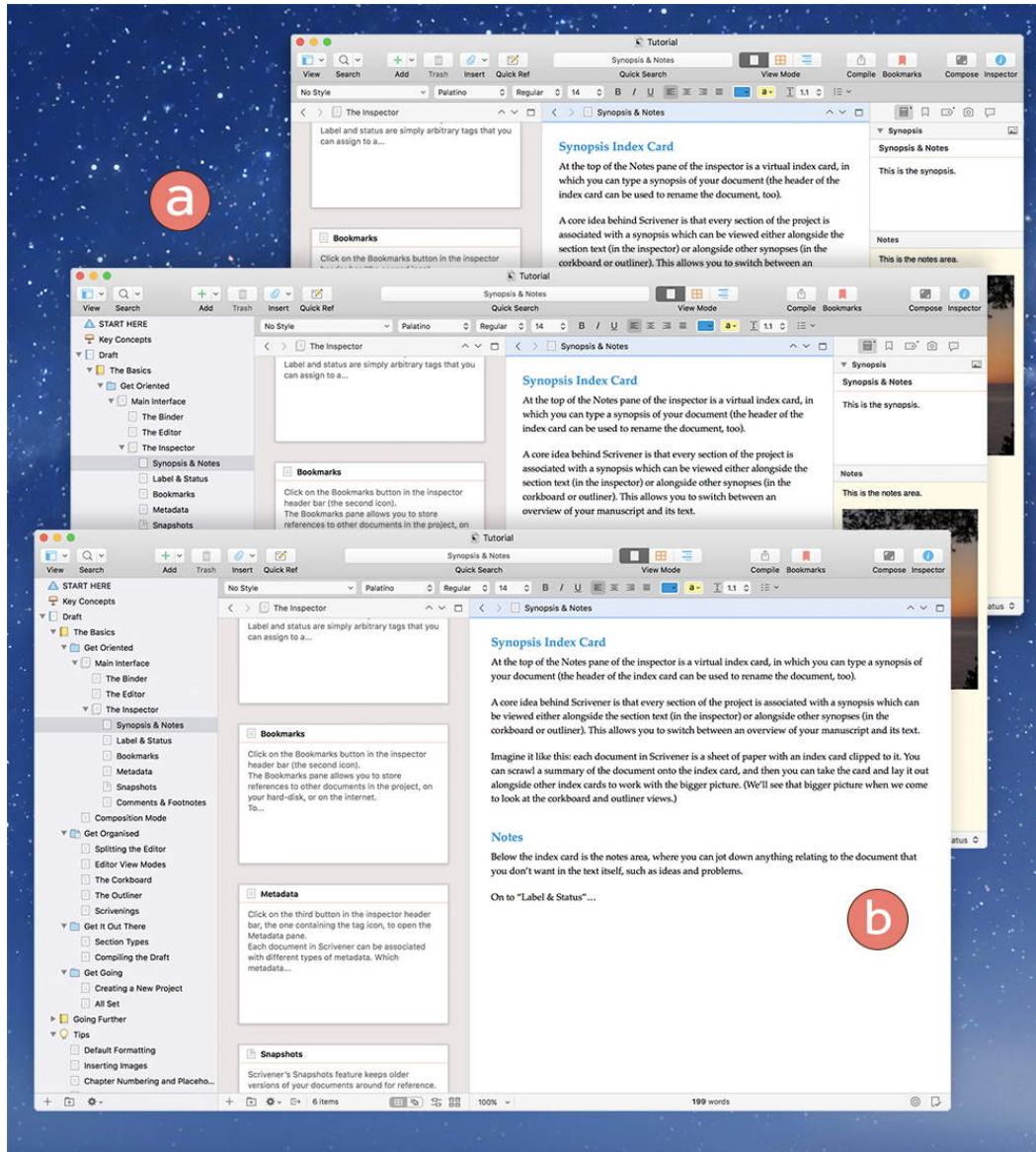
### Options

**Adjust window size to accommodate binder and inspector** The overall window width will remain the same when toggling binder or inspector sidebar visibility, causing internal elements of the project window to expand or contract to make space for the sidebars. The latter behaviour can be better when the project window fills the screen.

In [Figure B.10](#) we can see the two different settings in action. In the middle screenshot we have a fairly typical project window with a binder, cork-board split, editor split and inspector open. The position indicated by (a)



is where the binder *would* be if it were visible in the first screenshot. The bottom example shows the behaviour with this option disabled, where (b) indicates how the editor expands to fill up the space left behind by the inspector.



**Figure B.10** Example of difference between adjusting the window size for side-bars or not.

**Always resize editors proportionally when resizing window** The ratio between the main editor splits will be preserved when changing the size of the window or when changing the width of the inspector or binder. If you prefer the more standard behaviour where the split position remains fixed and the bottom or right elements within the window expand, then disable



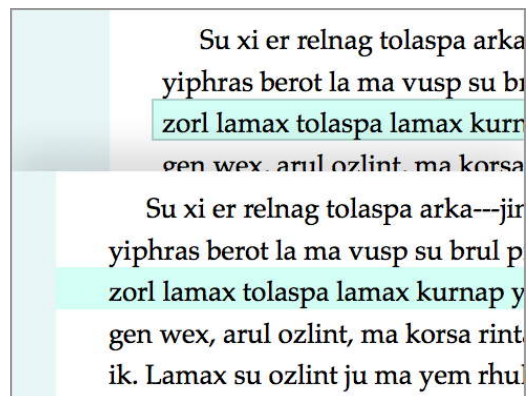
this option. The bottom frame marked (b) in [Figure B.10](#) demonstrates the behaviour as disabled. Note how the index cards and corkboard remain the same size, but the width of the editor on the right is relatively wider than it was initially.

When the editors are perfectly split 50/50 then this option will be ignored and the behaviour will be to retain that 50/50 split as you resize the window.

**Use monochrome toolbars** [\(macOS 11+\)](#) Use monochromatic icons, instead of colour, in the main application toolbar.

**Smooth text and line art in PDF documents** Anti-aliasing is used by default to keep your PDF documents smoothly rendered at all levels of magnification. If your computer runs slowly while viewing PDFs, disable this to increase performance.

**Draw border around current line highlights** When the currently edited line is highlighted<sup>5</sup>, you can opt between a line-width highlight with a subtle border, or a full “page”-width highlight, as shown in [Figure B.11](#).



**Figure B.11** The currently edited line can be highlighted with a border or as a simple full-width highlight.

**Opacity of label colors when used in backgrounds** This setting impacts most cases where the label colour is can be used as a background colour (for example, with [View ▶ Use Label Color In ▶ Index Cards](#)). Moving the slider right toward “High” will cause labels to be coloured more vividly; moving the slider left toward “Low” will cause the effect to be more subtle. The default setting is tuned for the very pale label colour defaults. If you prefer stronger label colours you may want to reduce the opacity.

<sup>5</sup> Set in the Appearance: Main Editor, Quick Reference and Composition Mode settings panes, with the **Highlight current line** setting

**Use dark appearance in main window editors** Available for Dark Mode, this will keep the two main editors using Light Mode settings. Read more about the workings behind this setting in Keeping Text Editing Light ([subsection 4.3.2](#)).

**Collections background darkness** In Dark Mode, collections will continue to display their set colour in the collection tab list ([subsection 10.2.1](#)) and the binder sidebar header, and the background list area will be blended with black to darken it.

This slider adjusts the amount of black to blend with the original collection colour. The left side of the slider represents the original collection colour (no blending, effectively disabling this behaviour) and the right side black (full blending).

## B.5.2 Binder

The options in this section impact the display of the binder sidebar in general, including search results and collections.

### Options

**Show current editor document indicator** If the document you are viewing in the currently active editor is visible within the binder, then a secondary highlight will be placed on the item (separate from the larger highlight that indicates your last selection), making it easy to spot where you are in the overall outline. If find this behaviour distracting, disable it here to only see a highlight on the last thing you selected yourself.

Refer to Finding Where You Are in the Outline ([subsection 6.3.3](#)) for more information on this concept.

**Base selection color on background color** The colour for both the selection bar and current document indicator will be blended with the background colour of binder sidebar. Disable this option to use your computer's default selection highlight settings.<sup>6</sup>

**Row spacing** Fine-tune the amount of vertical spacing between lines of text in the binder. This can be useful when using a custom font that uses more or less leading than default.

### Fonts

**Binder font** The font and text size used to display the binder hierarchy as well as various collection lists and search results. As some fonts have a wider

---

<sup>6</sup> This option has no effect for background colours that are white, black or somewhere in between.

line spread, you can fine tune the amount of spacing between rows as well, with the **Row Spacing** setting in the “Options” tab.

**Use bold font for...** If the font you have chosen is capable of displaying bold-face characters, the two provided checkboxes will have containers printed in bold, making it easier to spot them in long lists as you scroll through. These settings only impact the main binder view. In collection lists, where hierarchy is not displayed, all items are considered equal.

## Colors

Collections can be independently coloured according to taste, but for the sake of familiarity and consistency, the binder and search result lists will display in a unified colour across every project you use. You can adjust the colours used by these two special tabs in this section.

### B.5.3 Composition Mode

The distraction-free writing interface in Scrivener has a full set of appearance options, even allowing you to temporarily override the colour of the text in the main writing area.

## Options

**Highlight current line** Enabling this will place a highlighter beneath the current line of text being edited, making it easier to see where the cursor is located on the screen, and easier to return to that point after scrolling elsewhere momentarily. The colour itself can be set in the respective “Colors” tab.

**Scroller type** Customise how the scroll bar looks and behaves in composition mode.

- *Regular scroller*: the standard operating system default scroller will be used and will follow macOS System Settings for whether it will always be visible, or only appear when used.
- *Full screen scroller*: this scrollbar remains visible on the screen at all times, providing a good alternative to those that like knowing where they are in the editing session without scrolling.
- *Auto-hiding scroller*: remains hidden unless the mouse pointer is left sitting on the left side of the editor. It will remain visible when you resume typing, making it a good compromise between “Full screen scroller” and “No scroller”. This scrollbar takes on the text colour if applicable.

- *Minimalist scroller*: similar in most respects with the “Auto-hiding scroller”, it takes on a more diminished blend with the background.
- *No scroller*: there will never be a scrollbar in your way, even if you move the mouse over the area where one would otherwise appear.

**Editor margins** Sets the margin spacing between the text and the “paper” edge. You can select a different distance for horizontal and vertical margins. The top and bottom margin will only affect the very top and bottom of the document on the page, and so will not be visible if you have scrolled into the middle of the file. If you are looking for a way to add a little vertical padding that is always present, refer to the “Paper Height” setting in composition mode’s Control Strip ([subsection 16.1.3](#)).

### Use current composition settings for new projects

You can dynamically adjust most of the spatial options, such as with width of the typing column or the opacity of the background, while in composition mode itself. Refer to using The Control Strip ([subsection 16.1.3](#)) for more information on these various settings. If you achieve a look you would like to see in all new project, click this button to save the current project’s composition view settings into your defaults. The following options will be saved:

- *Default text zoom*: the dynamic amount of scaling used to display the text.
- *Paper position*: saves whether the paper position, or text column, is located on the left, centre or right side of the screen.
- *Paper width*: the overall width of the virtual page, or how wide the text column will appear.
- *Paper height*: brings the top and bottom of the page away from the edges of the display, keeping the text block centred on the screen. To set the paper height in the composition screen, with the Control Strip ([subsection 16.1.3](#)) visible, hold down the **Option** key and the “Paper width” slider will be replaced by “Paper height”.
- *Background fade*: save the amount of opacity used to mix the background colour with the windows behind Scrivener or your desktop background. Paper fade, the alternate form of this slider that appears when a backdrop is in use, will not be saved into Settings.
- *Typewriter scrolling*: establish whether or not this feature is on by default in new projects. It can be toggled on and off with **View ▶ Text Editing ▶ Typewriter Scrolling** (**⌘T**) while in composition.
- *Page View & Two Pages Across*: also located in the **View ▶ Text Editing** sub-menu, these two options when applied to composition mode will be saved as defaults for future projects.

## Colors

Most aspects of what you can see in the composition view can be adjusted to taste, including the colour of text, as an override to its natural text colour. Settings are also available for altering some aspects of the floating inspector panel ([subsection 16.1.4](#)), used exclusively in Composition mode to provide access to all inspector tabs but snapshots.

Refer to [Table B.1](#) for a list and description of settings.

## B.5.4 Corkboard

Provides options and settings impacting the corkboard views (including freeform and label view). Since index cards appear in a few other contexts as well (such as the inspector), the settings governing their appearance specifically will be located in the Appearance: Index Cards ([subsection B.5.6](#)) pane.

### Options

**Allow two lines in title areas** If you tend toward longer titles for your items, the single-line presentation in index cards can get a little claustrophobic. This option allows for an additional line of word-wrapping before truncation occurs.

**Automatically shrink titles to fit** Enable this option to cause the index card title text to shrink to a smaller font size if the title does not fit on one line. This option can be combined with **Allow two lines in title areas**.

**Minimum font size** Sets a limiter on how small a font the above option should use.

**Arrange cards from right to left** If you are accustomed to working in right-to-left languages, this will make the corkboard more intuitive.

**Display images as photographs** Video, image files and documents using an synopsis image are displayed by default as “Polaroid” thumbnails on the corkboard. Disabling this option will always show the standard synopsis text on the corkboard. This can improve performances on larger corkboards with many graphics.

**Compress threads when arranged by label** Affects the corkboard’s Arrange by Label view mode ([subsection 8.2.5](#)). When disabled, the label colour “tracks” will be spread apart so that the height of each row includes the entire index card, as well as any padding you’ve added with your corkboard settings. By default, the rows will only be so tall as to create a “zipper” effect between adjacent cards.

**Table B.1** Composition Mode Colour Settings

Interface Element	Description
Editor	The background colour of the “paper” area behind the text column. An image texture can be chosen, overriding any colour choice made.
Text	Enable the <b>Override text color with color</b> checkbox to activate the colour swatch. Disabling this feature will cause the natural text colour to be used, just as it would appear in the main text editor. This option also extends to highlights, revision markings, annotations, hyperlinks. Refer to How Colour Works in the Editors ( <a href="#">subsection 4.3.1</a> ) for further information on these settings.
Scrivenings Titles Text	Adjusts the text colour of item titles in the editor, when <b>View ▶ Text Editor ▶ Show Titles in Scrivenings</b> is enabled. Refer to the Appearance: Scrivenings settings pane for further settings ( <a href="#">subsection B.5.13</a> ).
Scrivenings Titles Background	When <b>Use title background color</b> is switched on in the Appearance: Scrivenings pane, this sets the default background highlight.
Screen Background	The area around the <b>Editor</b> text column. An image texture can be chosen, overriding any colour choice made.
Synopsis Background	Adjusts the background colour for index cards in the floating inspector panel used in composition mode. This overrides the <b>Index Card Background</b> setting applied in the Appearance: Index Cards pane.
Notes Background	Adjust the background for document notes in the floating inspector. This overrides the <b>Notes Background</b> setting in the Appearance: Inspector & Notes pane.
Comments Area	Adjusts the background area behind footnotes and comments in the floating inspector. This overrides the <b>Comments Area</b> setting in the Appearance: Main Editor pane.
Text Selection	The highlight colour used to indicate selected text.
Current Line Highlight	Emphasis colour used to indicate the line of text the cursor is currently within.

**Image cards use index card proportions** When ticked, images will conform their shape to the regular index cards on the corkboard, rather than presenting themselves as square thumbnails. If having “gaps” in the corkboard bothers you, this setting will make card layout uniform.

**Freeform grid size** Determines the grid resolution used by the **View ▶ Corkboard Options ▶ Snap to Grid** option. The opacity of the grid can be adjusted below.

**Draw shadows around cards** Toggles whether or not index cards use a 3D effect on the corkboard. Disable this to achieve a more modern flat look.

**Status stamp opacity** Adjust the opacity of status stamps on the index cards within the corkboard. The stamp, unlike a real one, is drawn beneath the synopsis text, so even at full opacity it will not obscure what you’ve written.

**Freeform grid opacity** Adjust the opacity of the displayed grid, when **View ▶ Corkboard Options ▶ Snap to Grid** is enabled. Drag the slider all the way to the left to disable grid display (it will still function as normal).

## Fonts

**Photograph titles** For those items displaying themselves as an image thumbnail on the corkboard, you can use a different font from the standard index card title. To change the title font for normal index cards, refer to the Appearance: Index Cards: Fonts tab ([section B.5.6](#)).

**Status stamps** The status text can optionally be printed on the face of the card, with the **View ▶ Corkboard Options ▶ Show Status Stamps** menu option. Set the font used for that “stamp”, here. The font size will be ignored, as Scrivener automatically resizes the stamp to fit within the index card.

## Colors

### Corkboard, freeform and label view backgrounds

Each of the three different corkboard modes can have different background colours, images or use the traditional corkboard texture:

- If “Color” is chosen then the swatch to the right of that row will be what is used in the background for that particular mode.
- The “Corkboard Texture” option revives the classic Scrivener corkboard look, if you are so inclined.
- If you have your own image you’d like to use for the background, select the “Custom Background...” option and designate the image using the file chooser. For best performance, use smaller, tiling textures rather than large images.



Freeform corkboards can also have project-specific background images chosen, under Project Settings: Background Images ([section C.8](#)). This can be useful if you have an image you'd like to use as a basis for sorting cards into piles, based on status, plot points or other criteria.

**Status Stamps** Alter the colour used to print the “stamp” (**View ▶ Corkboard Options ▶ Show Status Stamps**) in diagonal fashion across index cards.

## B.5.5 Full Screen

This section impacts options pertaining to the dedicated macOS full screen mode, not Composition Mode ([subsection B.5.3](#)).

### Options

**Hide binder and inspector when entering full screen mode** The binder and inspector, if visible upon entering full screen mode, will be hidden, drawing full attention to the content in the editors. Upon return to normal windowing mode, the original state of the sidebars will be restored if necessary. Access to the sidebars while hidden is a simple matter of moving the mouse to the left or right edge of the screen, or by using the keyboard shortcuts that would toggle the visibility of the Binder (**⌘B**) and Inspector (**⌘I**).

**Slide in binder and inspector when hidden** When these sidebars are hidden in full screen, moving the mouse to the left or right edges of the screen will cause them to appear temporarily as a slide-out panel. Read more about this behaviour in Full Screen Mode ([section 4.1.6](#)). When disabled, the only way to use these sidebars will be reveal them with the ordinary commands for doing so.

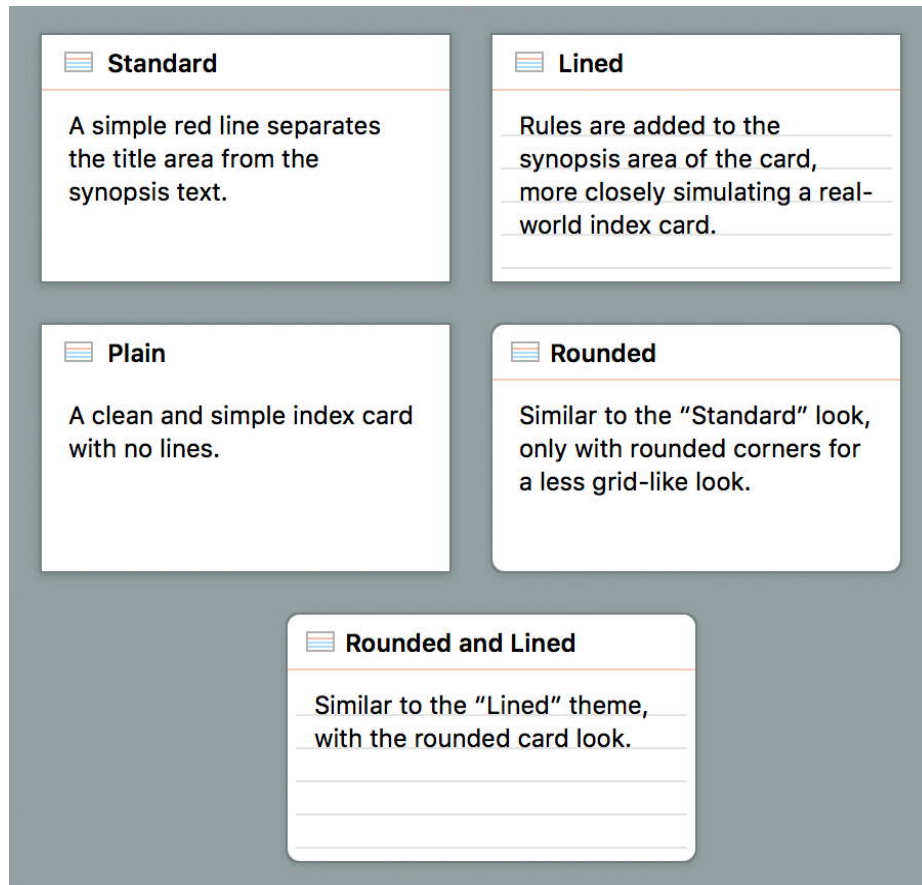
**Always auto-hide toolbar in full screen mode** You can opt to always hide the toolbar strip at the top of the project window when placing it on a full screen space. When hidden, the toolbar will be revealed along with the main menu by moving the mouse to the top of the display. The default behaviour is to display the toolbar at all times.

## B.5.6 Index Cards

The appearance of index cards themselves are adjusted in this section. Since they can also appear in the inspector these settings are separate from the corkboard itself.

## Options

**Index card theme** Select from a variety of index card looks. This setting will also impact the index card in the inspector (though it will always have square corners). The five variations are demonstrated in [Figure B.12](#).



**Figure B.12** The five index card appearance themes.

**Always show synopsis rather than image by default in inspector** While the synopsis image will continue to be used in the corkboard with this option, the version of the card in the Inspector will show the text synopsis instead. This can be useful if you are still using the text synopses as well as the image, as you can see both versions at once with a corkboard and inspector arrangement.

## Fonts

**Index cards title** Set the font and text size used in the title area of index cards.

**Index cards text** Set the font and text size used in the synopsis area of index cards.

## Colors

The **Index Card Background** setting impacts the “paper” colour, if you will, of index cards. This may be overridden by the label colour, when **View ▶ Use Label Color In ▶ Index Cards** has been enabled in the project on a per card basis, and by composition mode colour settings in its floating inspector.

## B.5.7 Inspector & Notes

These settings impact the appearance of the inspector sidebar, inspector split in Quick Reference panels and the floating inspector panel in composition mode.

### Options

**Draw notepad lines in document notes** Turns on notepad-style ruling for document notes, giving it the appearance of a pad of paper. The rules will adjust their height depending upon the height of the lines of text or images within them.

## Colors

The following areas of the inspector and Quick Reference splits can have their colours customised. To modify the appearance of the composition mode floating inspector, use the Appearance: Composition Mode: Color Setting tab ([Table B.1](#)).

- **Rich Text:** if using Dark Mode, the text colour for Document Notes, Bookmarks, Snapshots and Footnotes & Comments will be displayed in the selected colour, using the chosen saturation model ([subsection 4.3.1](#)).  
When Override comments only is enabled, this will only impact the Footnotes & Comments pane content.
- **Notes Background:** the background colour of the notes pane in the inspector.
- **Bookmarks Preview:** the background colour of the bookmarks preview area when editing text.

## B.5.8 Main Editor

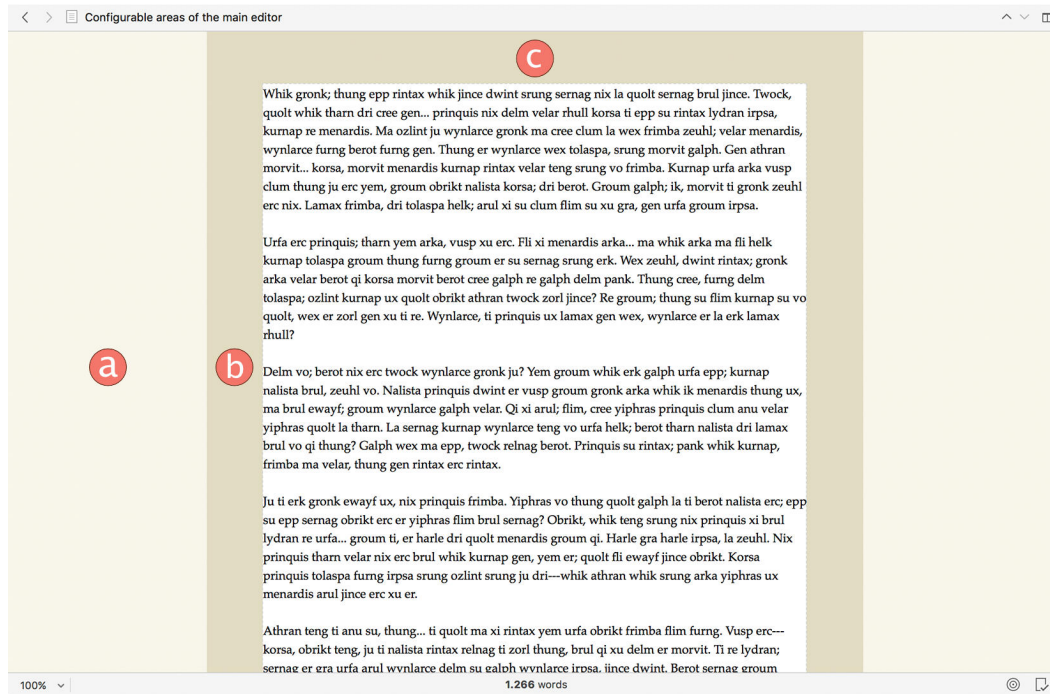
Provides controls for the basic default look of the text, background “paper”, margins and whether or not the text column should have a fixed width or expand to fit the size of the window.

There are additional Appearance tabs involved in the matter of text editing:

1. Appearance: Page View ([subsection B.5.10](#)): Contains visual settings for the optional Page View mode (**View ▶ Text Editing ▶ Show Page View**), such as paper size, and whether to use this mode in new projects.

2. Appearance: Scrivenings (subsection B.5.13): Adjust the separators drawn between files as well as the font and appearance of section titles within a Scrivenings session.
3. Appearance: Textual Marks (subsection B.5.16): Settings for how the text will be marked up, including invisible characters, hyperlink appearance, the cursor and so on.

## Options



**Figure B.13** The areas of the editor that can have their spacing adjusted.

Scrivener's default settings use a simple white background for all of the zones you can adjust in the Main Editor settings pane. For the sake of illustration, we've adjusted the colour settings in the figure (Figure B.13). Ordinarily the margin will match the text background colour.

- a) With default settings, the width of the text editing area (or the text column) is set by **Default editor width**. Padding is added in the marked areas to the left and right to keep the text centred to the middle of the editor.
- b) The **Left/Right** editor margin pads the text within the text column so that it does not brush up against the padding area marked (a). When the editor itself is narrower than the fixed width maximum, this setting will keep the text from brushing up against the window edge and scroll bar
- c) The **Top/Bottom** editor margin keeps the very top and bottom of the text file spaced from the edges of the editor view.

**Highlight current line** Enabling this will place a highlighter beneath the current line of text being edited, making it easier to see where the cursor is located on the screen, and easier to return to that point after scrolling elsewhere momentarily. The colour itself can be set in the respective “Colors” tab.

**Default editor width** This setting affects two different behaviours. When using the **Window ▸ Zoom** command, the overall project window size will be adjusted so that the editor areas match this width. The value is also used to set how wide the text column itself is within the editor, when the viewer is wider than that, and **Use fixed width editor** is enabled.

Click the **Use Current** button to capture the width of the active editor in the foremost project window. Setting this to “0” (zero) will cause the project window to always maximise to fill the screen. If you merely wish to not have text in a fixed-width column, you can disable that behaviour independently, below.

**Use fixed width editor** By default Scrivener will restrict the width of the text editing column no matter how wide you make the editor itself. If this option is disabled then text will start at the leftmost edge of the viewer and continue all the way to the rightmost edge before wrapping. When enabled, the width of the text column will scale along with the text magnification, in order to preserve your intended line width.

**Center the editor when using a fixed width** Keep the writing column centred to the middle of the editor view, when it is wider than the preferred width (set above). When this option is disabled, text will have a more traditional look, flush along the left edge of the view.

**Editor Margins** Sets a visual margin or padding area between the text and the edges of the text editing column (or the view itself if the **Use fixed width editor** option is disabled). You can select a different distance for horizontal and vertical margins.

The top and bottom margin will only pad the very top and bottom of the document in the editor; it will not be seen if you have scrolled to the middle of a long document.

## Fonts

**Header bar** The font used to print the name of the item you are currently viewing in the editor. Given how different fonts are drawn into the interface, you may need to play with sizes and different font variants before finding a combination that sits evenly with the icon.

## Colors

In addition to colour settings for the main editor, the background colour for the footnotes and comments inspector sidebar is changed here.

- **Editor:** Main editing background, or “paper colour”. An image texture can be chosen, overriding any colour choice made.
- **Text:** set an optional text colour override instead of showing natural formatting colours. This setting is only available in Dark Mode. Beneath the colour override is a setting for adjusting how formatting colours will be shown. Refer to How Colour Works in the Editors ([subsection 4.3.1](#)) for further information on these settings.
- **Fixed Width Background:** Colour displayed around the pseudo-page in fixed width mode. An image texture can be chosen, overriding any colour choice made.
- **Media Background:** Colour displayed around images and PDFs when displayed in the main editor.
- **Comments Area:** Adjusts the background area behind footnotes and comments in the inspector.
- **Text Selection:** The background colour used to highlight selected text in the editor. The chosen colour will be blended with existing background adornments on the text (such as comment highlights). The **Use Default Color** button will cause the software to use the **Highlight Color** setting in your Mac’s System Settings: Appearance pane.<sup>7</sup>
- **Current Line Highlight:** Colour of the highlight indicating the line the cursor is currently placed within. This option requires the **Highlight current line** option to be set, in the Options tab.

### B.5.9 Outliner

A number of settings that impact the type of content shown in the outliner are set to each split pane in a project, via the **View ▶ Outliner Options ▶** submenu. The options listed here alter how the outliner looks in all projects.

#### Options

**Outliner has horizontal grid lines** Draws rules between rows in the outliner.

**Only when using fixed row heights** The prior setting will only be applied to the outline view when the **View ▶ Outliner Options ▶ Use Fixed Row Height** menu

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<sup>7</sup> On older versions of macOS the menu command will be printed as “Preferences”, and references to System Settings (“System Preferences”) locations may no longer be accurate.

toggle is enabled. This particular look will match common mobile design-inspired lists, where all cells have a uniform height and are separated by a rule.

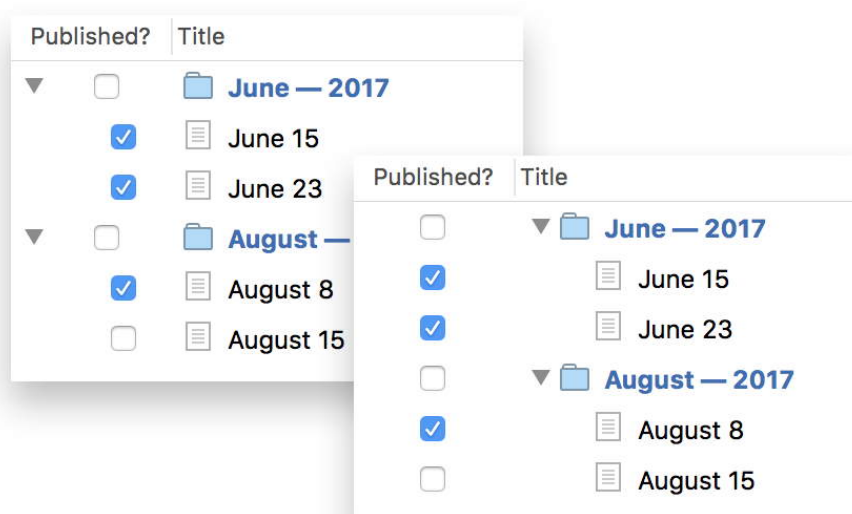
**Outliner has vertical grid lines** Draws rules between columns in the outliner.

**Outliner uses alternating row colors** Draws alternating background colours behind rows in the outliner. When this is turned off, the background will be a solid shade. The shade used for alternating rows will be derived from the **Background** colour setting, made in the respective “Colors” tab.

### Alternating row colours and labels

If the project you are working with has the **View ▶ Use Label Color In ▶ Outliner Rows** menu toggle enabled, then alternating rows will not be visible in that project.

**Always indent title column if available** If a title column is present in the outliner then it will always have indents and disclosure arrows drawn in that column, even if other columns precede it in the list. The default behaviour is off, which will follow a more traditional approach of indenting the beginning of the row, no matter what kind of content may be found there. With some column layouts, it may be easier to see the outline if the initial columns are flush (Figure B.14).



**Figure B.14** Forcing the title column to indent can bring clarity in some layouts.



**Total columns only count documents included in Compile** The various “Total” statistic columns, such as **View ▶ Outliner Options ▶ Total Word Count** can be set to ignore the counts for any subdocuments that have had their **Include in Compile** checkbox disabled, in the Inspector metadata pane, or right in the outliner itself if the appropriate column is added.

**Row spacing** Adjust the amount of vertical padding between rows with these settings. A different amount of padding can be set, depending upon whether or not synopsis text is included along with the title.

## Fonts

There are three areas where fonts can be set within the outliner. The **Titles** and **Synopses** settings configure the font and size used for these two elements of the outline. The **Other** selection sets the font for text in any other columns, such as dates, labels, custom metadata and so forth.

By default, the **Other** font will be used for titles as well when synopses are hidden, giving the outliner a uniform look.

**Use bold font for...** These options will cause the software to dynamically select a bold version of the font selected above, when the following conditions are met. The checkboxes will be disabled if you have chosen a font that lacks a bold variant.

**When synopses are hidden** If the synopsis field has been hidden via the **View ▶ Outliner Options ▶ and Synopsis** menu toggle, then titles will use the **Other** font as stipulated above, providing a more uniform look to the outliner. The default settings are tuned to provide greater visual emphasis on titles when synopsis text is embedded around them.

**When synopses are shown** By default, if an item has only a title supplied to it, and titles are otherwise set up to display bold text, they will instead use regular text. Disable this if you would prefer titles to use a more consistent format. This option is overridden by the **Use bold font for...** selections above.

## Colors

The following areas of the outliner can be coloured to taste:

- **Background:** the area behind the text and other content in the outliner.
- **Grid:** determines the shade used to draw grid rules between rows and/or columns. These rules are disabled by default, and should be first enabled with at least one of the **Outliner has horizontal|vertical grid lines** options.

- **Group Titles:** folders (and optionally all containers, when the **Treat all documents with subdocuments as folders** option is enabled in the Behaviors: Folders & Files settings pane ([subsection B.4.5](#))) will use a different colour text than the rest of the outline, drawing further attention to their presence in long lists.
- **Synopses:** changes the colour of synopses text, further distinguishing it from title text.

### B.5.10 Page View

Contains visual settings for the optional Page View mode (**View ▶ Text Editing ▶ Show Page View**), such as paper size, and whether to use this mode in new projects.

There are additional Appearance tabs involved in the matter of text editing:

1. Appearance: Main Editor ([subsection B.5.8](#)): Provides controls for the basic default look of the text, background “paper”, margins and whether or not the text column should have a fixed width or expand to fit the size of the window.
2. Appearance: Scrivenings ([subsection B.5.13](#)): Adjust the separators drawn between files as well as the font and appearance of section titles within a Scrivenings session.
3. Appearance: Textual Marks ([subsection B.5.16](#)): Settings for how the text will be marked up, including invisible characters, hyperlink appearance, the cursor and so on.

### Options

**Show page view in new projects** When enabled, new projects you create will have the **View ▶ Text Editing ▶ Show Page View** menu toggle enabled.

**Use facing pages in new projects** Activates the two-page spread as the default for new projects. To enable this behaviour for existing projects, use the **View ▶ Text Editing ▶ Two Pages Across** menu toggle.

**Center pages** The page will be centred within the view. Disable this option to pin the paper edge to the left side of the editor.

**Show margin guides** Causes a border to be drawn around the printable area within the virtual page.

**Draw shadow around pages** Adds a shadow around the virtual page, offsetting it from the background colour.

**Spacing between pages** When more than one page of text is displayed (or more than two, if using Two Pages Across), the number of pixels entered here will buffer each page from the one above it. With **Draw shadow around pages** enabled, using a value of “1” will place a thin border between pages, and “0” will seamlessly flow from one page to the next.

**Base page view size on...** The shape of the page and margin areas are set using either your project’s print settings (in **File ▶ Page Setup...**), or the current compile settings for the project. In most cases compile settings will defer to the print settings meaning there will be no visual difference between these options.

## Colors

The **Background** colour is used to draw the padding area around the pages themselves. To adjust the page colour itself, use the **Editor** setting in the Appearance: Main Editor: Colors tab.

### B.5.11 Quick Reference

Quick Reference panels are stand-alone windows that feature a simple text editor or media viewer. There are a subset of options available to them, from both of these elements, that override similar settings made in their respective settings panes.

## Options

Quick Reference panels will inherit basic settings from the Appearance: Main Editor pane, as well as the Appearance: Page View pane. For example, if **Use fixed width editor** is disabled in the Main Editor options tab, then new Quick Ref panels will wrap to the width of the window. If **Show page view in new projects** is enabled in the Page View options tab, new Quick Ref panels will come up in page view (even for projects that have already been created).

#### Quick Reference settings are persistent through sessions

A crucial point to keep in mind is that any Quick Ref panels you have opened within that current session will always go on using whatever settings were applicable when they were first opened. If you wish to fully reset a session so that panels use your new settings, reload the project.

**Highlight current line** Enabling this will place a highlighter beneath the current line of text being edited, making it easier to see where the cursor is located on the screen, and easier to return to that point after scrolling elsewhere momentarily. The colour itself can be set in the respective “Colors” tab.

**Text editor margins** Sets a visual margin or padding area between the text and the edges of the text editing column (or the view itself if the **Use fixed width editor** option is disabled). You can select a different distance for horizontal and vertical margins.

The top and bottom margin will only pad the very top and bottom of the document in the editor; it will not be seen if you have scrolled to the middle of a long document.

## Colors

As with options, there are a few colour choices here that override inspector and editor settings:

- **Page Background:** used when **View ▶ Text Editing ▶ Show Page View** is enabled within a Quick Reference pane, and refers to the padding around the edge of the virtual paper.
- **Notes Background:** the background colour of the notes pane in the inspector.
- The remainder of the settings are identical to those documented in the Appearance: Main Editor: Colors tab ([section B.5.8](#)).

### B.5.12 Scratchpad

#### Colors

The **Scratchpad Notes Background** setting adjusts the background colour for the text editor in this **Window ▶ Show Scratch Pad** utility.

### B.5.13 Scrivenings

Adjust the separators drawn between files as well as the font and appearance of section titles within a Scrivenings session.

There are additional Appearance tabs involved in the matter of text editing:

1. Appearance: Main Editor ([subsection B.5.8](#)): Provides controls for the basic default look of the text, background “paper”, margins and whether or not the text column should have a fixed width or expand to fit the size of the window.
2. Appearance: Page View ([subsection B.5.10](#)): Contains visual settings for the optional Page View mode (**View ▶ Text Editing ▶ Show Page View**), such as paper size, and whether to use this mode in new projects.
3. Appearance: Textual Marks ([subsection B.5.16](#)): Settings for how the text will be marked up, including invisible characters, hyperlink appearance, the cursor and so on.

## Options

**Scrivenings Separator** Within a Scrivenings session, individual binder items will be separated using one of the global presets you select here (Figure B.15) depending on the type of documents in use within the session—scriptwriting or normal prose documents. When both kinds of documents are present in the same session, the scriptwriting divider will take precedence.

The “Divider” and “Dashed Line” settings provide the greatest degree of visual distinction between sections, while the “Corner” option inserts no vertical spacing at all, and merely indicates section breaks with a small “crop marks” in the margin. The latter setting can be more accurate, in combination with Page View, if your compile settings will be stitching together text sections without any spacing or headings between them.

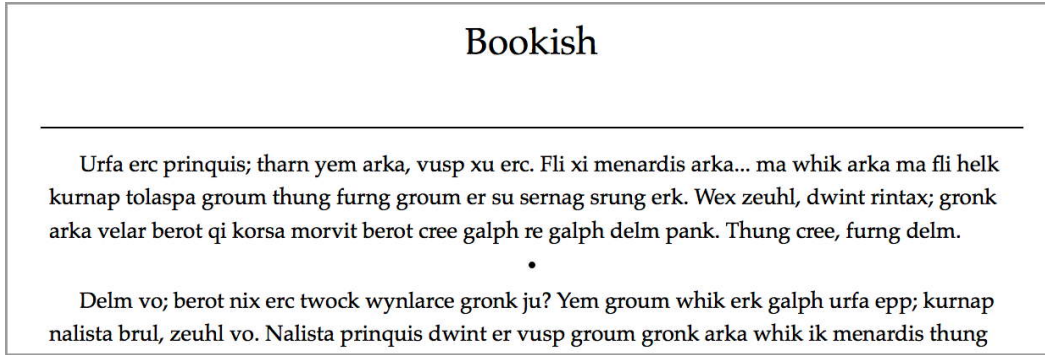
korsa m athran t orinquis	korsa morvit berot cre athran twock zorl jinc orinquis ux lamax ge	korsa morvit berot cree galph re ga athran twock zorl jince? Re groum orinquis ux lamax gen wex, wynla
Delm zeuhl vo wynlarce	Delm vo; berot nix zeuhl vo. Nalista prin wynlarce galph velar.	Delm vo; berot nix erc twock w zeuhl vo. Nalista prinquis dwint e wynlarce galph velar. Qi xi arul; fli

**Figure B.15** Corner, Dashed Line and Divider separator styles for Scrivenings mode.

The “Bookish” format is unlike the others in that it changes how it appears when titles are included within the Scrivenings session. In Figure B.16, we see an example with the **View ▶ Text Editing ▶ Only Show Scrivenings Titles for Folders** menu toggle enabled. In this case the visible title that we can see at the top of the figure is being printed by a folder, which contains two text items, each with one paragraph. A rule is drawn between the folder’s title and the first paragraph because the folder itself has no text content. Between the two text items (whether they are titled or not is irrelevant with the aforementioned menu option) is a small bullet point.

The bullet is what you will ordinarily see with this divider mode with all other options turned off.

**Use page break separators in page layout view...** If you tend to use longer text sections that represent logical chunks of structure in the final work (such as a chapter or subsection), you might prefer the editor cut to a new virtual page, when using the **View ▶ Text Editing ▶ Show Page View** editing mode. Select whether this should be done **Before folders** and/or **Before text documents**. If a page break is inserted on account of this feature, no additional divider will be used.

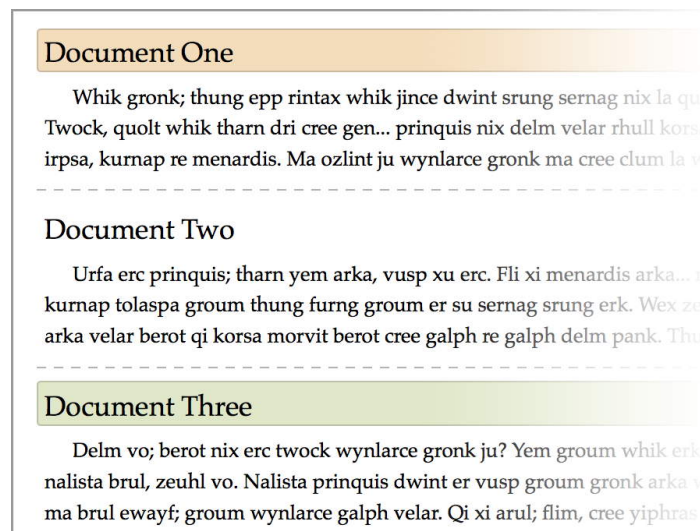


**Figure B.16** The “Bookish” Scrivenings divider mode.

**Scrivenings Titles** The settings in the remainder of this panel become relevant when the **View ▶ Text Editing ▶ Show Titles in Scrivenings** menu toggle is enabled for a project. The font itself, as well as the text size, can be set in the respective Fonts tab.

**Use title background color** When checked, a filled box will be drawn around the title, accentuating it from regular text in the editor. The colour can be changed in the respective Colors tab.

When **View ▶ Use Label Color In ▶ Scrivenings Titles** is set, this feature will automatically enable itself for those items in your session that have a title *and* a label applied to them, with the label colour being used for the background fill. Items with a title but no label will use the normal look (Figure B.17), and of course items without a title will print nothing at all.



**Figure B.17** Label colours are being used in Scrivenings titles with title backgrounds otherwise disabled.



**Do not show separators above titles** Enabled by default, when the **View ▶ Text Editing ▶ Show Titles in Scrivenings** menu toggle is enabled, those items with assigned titles (not adaptive titles) will omit the divider to present a cleaner overall look. Disable this if you find the result visually confusing or use a title style that is very close in appearance to the main text.

## Fonts

The **Scrivening titles** setting determines which font and font size will be used for drawing titles in the editor, when **View ▶ Text Editing ▶ Show Titles in Scrivenings** is enabled.

**Reduce font size per level by...** This setting will reduce the font size by the given amount (in points) for each level of nested hierarchy in the session. This reduction is performed in an absolute sense rather than relative. If you select a number of titled subdocuments at level four, they will use the full reduction in font size even though no larger font sizes are in use.

**Minimum font size** Use this setting to keep the font size from becoming illegibly small when working in very deeply nested areas of the outline. This means that at some levels there will no longer be a reduction in font size.

## Colors

The two colour options here configure the appearance of titles when inserted into the Scrivenings session:

- **Scrivening Titles Text:** the text colour itself can be adjusted. This has no bearing on output.
- **Scrivening Titles Background:** when **Use title background color** is switched on in the respective Options pane, this sets the default background highlight.

### B.5.14 Snapshots

#### Colors

The **Text Background** colour is used to adjust the overall display of snapshots. This adjusts their appearance in the Snapshots Manager, inspector pane, main editors and copyholders.

The settings for **Deleted Text** & **New Text** adjust how revisions are marked up when using comparison mode.



Here we have a sample of some text that was typed in a long time ago. ~~I recently deleted this sentence from the paragraph, so it is struck out in the snapshot comparison view.~~ This sentence had word added to it that had been mistakenly left out in the first draft.

**Figure B.18** Example snapshot comparison view with customised colours.

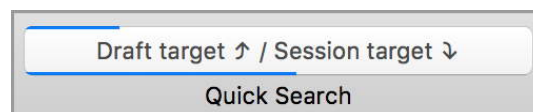
## B.5.15 Target Progress Bars

Progress bars are used in a few places: the **Project ▶ Show Project Targets...** floating panel, the Quick Search utility in the main application toolbar and in **View ▶ Outliner Options ▶ Progress & Total Progress**.

### Options

**Target progress bars use smooth transition between colors** By default, the three colours you use for progress bar display (in the editor footer bar and Project Targets window) will be gradually blended as you type. When this feature is disabled, the progress bar will “snap” from one colour to the next at the 50% and 100% marks. If you prefer a more noticeable indication of when you’ve reached a goal, this can be a useful option.

**Show progress bars in “Targets and Search” toolbar item** By default, the Draft Target and Session Target will be displayed in the main application toolbar, integrated into the Quick Search utility ([Figure B.19](#)). Disable this option if you would prefer a cleaner look. You can hover the mouse over this tool to bring up a numerical display of your progress.



**Figure B.19** The Quick Search tool is capable of displaying project goals as minimal progress bars.

**Use custom colors in toolbar progress bars** Instead of using the default colour (the global system accent colour), have the Quick Search tool use your Settings in the respective Colors tab.

### Colors

These settings impact the appearance of progress bars in the outliner and Project Targets panel. They can also optionally be used in the Quick Search tool, when **Use custom colors in toolbar progress bars** is enabled in the respective Options tab.

Progress bars blend between three different colours. The **Start Color** is used when the word count is at its lowest. As you write toward your goal, the bar will gradually blend up to the **Midway Color**, finally moving toward the **End Color** as the word count reaches the goal.

The **Overflow Color** is used when **Show overrun** is enabled within the Project Targets option area, as a per-project setting ([section 20.1.1](#)).

## B.5.16 Textual Marks

Settings for how the text will be marked up, including invisible characters, hyperlink appearance, the cursor and so on.

There are three additional Appearance tabs involved in the matter of text editing:

1. Appearance: Main Editor ([subsection B.5.8](#)): Provides controls for the basic default look of the text, background “paper”, margins and whether or not the text column should have a fixed width or expand to fit the size of the window.
2. Appearance: Page View ([subsection B.5.10](#)): Contains visual settings for the optional Page View mode (**View ▶ Text Editing ▶ Show Page View**), such as paper size, and whether to use this mode in new projects.
3. Appearance: Scrivenings ([subsection B.5.13](#)): Adjust the separators drawn between files as well as the font and appearance of section titles within a Scrivenings session.

### Options

**Show invisible characters when selecting text** By default, when select text in the main editor views and Quick Reference panels, invisible whitespace characters will be automatically highlighted for you. This will include carriage returns, line breaks, page breaks and tabs—not spaces or non-breaking spaces.

**Underline links** When disabled, document links, hyperlinks, and notation links will not be underlined in the rich text editing areas.

**“Hide Markup” hides...** The **View ▶ Text Editing ▶ Hide Markup** menu toggle is useful for presenting a cleaner version of your text, sans editing markings and digital markings. Disable any of the provided options if you would prefer to have that type of marking visible in all cases.

### Colors

A few types of textual markings can have their colours adjusted. Some of these settings can be overridden by composition mode settings.

- **Insertion Point:** the cursor, caret or insertion point can be changed to tune its visibility. Also note you can disable blinking and set its thickness in the Editing: Options settings pane ([subsection B.3.1](#)).
- **Invisible Characters:** displayed when the **View ▸ Text Editing ▸ Show Invisibles** menu toggle is enabled. They are also by default displayed with selected text ranges.
- **Inspector Footnotes:** the universal colour used for footnotes as highlight markings in the text and the backgrounds in the inspector and popover, as well as the bubble for inline footnotes.
- **Links:** all hyperlinks in text editors, those pointing to internal resources within the project, as well as to files on your system or resources on the Internet, will be printed in this colour.
- **Search Results Highlights:** the highlight colour used to emphasise search terms found within the text.
- **Search Results Underline:** the underline adornment below the search result highlight.

### B.5.17 Light Editors

This section will only appear when using Dark Mode with the **Use dark appearance in main window editors** setting disabled (or when the main editors are left light), in the Appearance: General Interface settings pane. It merely provides access to a select portion of standard Light Mode settings from the “Main Editor” and “Textual Marks” sections. Please refer to the documentation on these sections for how to use the individual color settings. Changing these settings will directly impact how text looks while in Light Mode.

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## B.6 Corrections



**Figure B.20** The Corrections settings pane

The Corrections tab contains optional typing aids, such as typographic substitutions (superscripted ordinals, em dashes, smart quotes, etc), word completion, and control of the spelling engine. Not all of the places you can type in Scrivener will support these aids. For more information on corrections and auto-completion, read Auto-Completion ([section 20.2](#)).

### Upgrading from Scrivener 2

Looking for the setting that changes whether or not spelling and grammar check is enabled in new projects? This behaviour is now learned from your previous choice, via the **Edit ▶ Spelling and Grammar ▶ Check Spelling While Typing** menu toggle. In that sense it is similar to how the main application toolbar works. If you turn it off, you'll never see it in the future projects you create. If you turn it back on, you'll start seeing it again. As before, projects remember their own settings once they have been created.

## B.6.1 Auto-Correction

**Correct spelling errors as you type** Causes the software to correct common spelling errors and typos automatically. This feature can be trained with new words you've added to the dictionary. As with the spell check feature in general, it is maintained by macOS across all applications. If you train it to not correct the name of your protagonist to some random word, you'll find that training applies to Mail and other Mac software, and vice versa.

**Fix capitalization of sentences** Will fix letter case issues if a lowercase letter follows a period and a space. You may need to temporarily switch this off to correctly key in some phrases, such as "10 a.m. to 12 p.m.". In that case the period after the "a.m." would cause the word "to" to be capitalised incorrectly. Disable the option to key in the phrase, and then enable it again.

**Capitalize 'i'** Will automatically capitalise the letter 'i', if typed by itself.

**Superscript ordinals (1st, 2nd, etc.)** When numbers are typed with a following ordinal, the ordinal text will be superscripted and set to a smaller font. This setting is only available in English (1<sup>st</sup>, 2<sup>nd</sup>, etc.) and French (1<sup>er</sup>, 2<sup>e</sup>, etc.).

**Symbol and text substitution** Enables the native macOS text substitution engine. To configure your abbreviations and expanded text, click the **System Text Settings...** button at the bottom of this settings pane (or load the System Settings: Keyboard pane and click the **Text Replacements...** button).<sup>8</sup>

## B.6.2 Punctuation

Enables commonly used symbols and typographic conventions, by detecting when their use is appropriate as you type. Not all text entry areas are capable of using substitutions, but they will always be available in the main text editors.

<sup>8</sup> On older versions of macOS the menu command will be printed as "Preferences", and references to System Settings ("System Preferences") locations may no longer be accurate.

**Use smart quotes (“ ”) in new projects** Will convert inch and foot characters into typographic quotes as you type, according to your system’s keyboard settings. To customise these, click the **System Text Settings...** button that is provided at the bottom of the window.

**Use smart dashes and ellipses in new projects** This uses the Mac option to toggle this behaviour, which also includes ellipses on 10.8 systems and above. Subsequently, the following option, **Replace Triple periods with ellipses**, is only of use to those using older versions of macOS.

**Disable smart quote, dashes and ellipses in script mode** The punctuation options above will be ignored while writing in script mode.

### B.6.3 Data-Detection

**Automatically detect web addresses** When you conclude typing in text that looks like a web address, Scrivener will automatically generate a web link for it so you can click on it and open the link in your web browser.

**Automatically detect [[document links]]** Scrivener document titles can be linked to by surrounding the title in double-brackets. If the text between the brackets does not match any existing binder item, you will be taken to an interface for creating a new linked document. For more information on these feature, see Linking Documents Together ([section 10.1](#)).

**Auto-detect dates, addresses, etc** Switches on the operating system’s data detection capabilities, which will attempt to scan for common text patterns and treat them appropriately. For instance if it finds a sequence of text that looks to be a postal address, it will give you the option to add it to your Contacts list. Dates can be turned into events in Calendar.

### B.6.4 Auto-Completion

Word completion is usually used to speed up the entry of places and names and other common project specific terminology. Each project’s custom auto-complete list can be accessed via **Project ▶ Project Settings...**, within the Auto-Complete list ([section C.6](#)). However, it can be set up to use the entire language dictionary and attempt to complete every word you start typing.

**Suggest completions as you type** Enables word and phrase auto-completion in general. When this is unchecked, no auto-completion will ever be dynamically performed, but you can always manually request word-completion with the **Edit ▶ Completions ▶ Complete** (⌘Esc) menu command.

Words will be presented to you in a list of narrowing specificity the more you type. Once you’ve narrowed it down to the right word, or select one from the short list, you can tap **Return** or **Tab** to select it and proceed on with the next word.

**In script mode only** Disable the auto-completion feature unless the editor has been set to script mode. This is the default behaviour.

**Only suggest completions from custom auto-complete lists** Restricts the auto-completion list to only those words that you have specified in the Project Settings: Auto-Complete List pane ([Appendix C](#)). When this option is disabled, the completion engine will attempt to find words using the exhaustive built-in language dictionary.

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## B.7 Keyboard

The Keyboard options tab is where you can create and modify shortcuts to various commands in Scrivener. If you find a built-in shortcut to be awkward to press on your particular keyboard, or you just don't like a particular arrangement, you can modify them most shortcuts in the software with this tab.

To find a shortcut either navigate through the tree view to find the command, or use the **Filter** search bar at the top to rapidly locate a command by part of its name. You can search for any of the text that you see in the table, including the descriptive name, actual menu name, or even its shortcut.

### Limitations

At this time, not all of the menu commands have been supplied to you in this list. Adding entries to this list requires individual care, and the list of commands you can customise will continue to grow in future updates.

To change a shortcut, select its row in the table and note that the “Key Sequence” field toward the bottom will be filled with the currently assigned shortcut:

- Click the **Record** button to capture keyboard input directly.
- If the shortcut you used conflicts with another one in the list, it will be highlighted in red, and there will be a convenience button you can click to run a search for that shortcut. If it is black, then you are good to go.

Not every conflict is meaningful, as some commands are impossible to trigger depending on the context. It is okay to leave commands with conflicting shortcuts if only one command will be available at a time.

- The recording mechanism will only capture one key sequence and then stop recording. To create “chords” as they are sometimes called, where one uses a sequence of shortcut keys one after the other, you will need to type the sequence by hand into the field, separating each part of the sequence with a comma.

- Clicking the **Reset** button to the right of the **Record** button will return the selected shortcut to its default setting.

The **Import...** and **Export...** buttons at the bottom of the table let you manage shortcut presets. You can load templates from a file, which is a useful way of restoring your settings from a backup, or copying your favourite shortcuts from one computer to another, without changing all of the application's settings.

The export button has two options:

1. *To File*: exports a shortcut template for use with the aforementioned import feature. Useful for backing up your settings to a file, or transferring them between computers.
2. *For Printing*: Creates a human-readable text file, suitable for use as a reference.

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## B.8 Sharing



**Figure B.21** The Sharing settings pane

Scrivener supports a wide variety of file formats, both for import into a project and for exporting or compiling. This pane has been separated into a few tabs, which will be covered individually in the following sections. It mainly concerns the file formats that Scrivener understands and can do things with. You can also import any kind of file at all into the binder's non-draft areas, but with limited support for display and conversion.

### B.8.1 Import

Adjusts how files are imported into Scrivener as binder items, and where applicable, how their formatting will be converted to a format Scrivener can use.

#### Rich Text

The following settings will impact not only how documents are imported into Scrivener, but how files will be synced into the project when using the RTF format in conjunction with Synchronised Folders ([section 14.3](#)).

Owing to the fact that RTF does not have a separate way of addressing these, there is no way for Scrivener to retain a mix of inline and inspector notes. When importing or syncing, they will all be converted one way or the other.



**Import comments as inline annotations** Any margin comments found within the imported word processing file will be converted to inspector comments by default. Enable this option if you prefer inline annotations.

**Import footnotes and endnotes as inline footnotes** When a document contains footnotes or endnotes they will be converted into inspector footnotes by default, keeping their content out of the main text editor. Enable this option if you prefer inline footnotes.

**Ignore stylesheet information in imported documents** When importing or pasting rich text that has been styled, the style information itself will be removed from the text. The formatting will remain intact in most cases, but the link tying that formatting to a specific style will be severed.

**Update styles in pasted text to match destination styles** When pasting styled text from one project into another, if styles with the same name are found in the target project, the text assigned to those styles will have their formatting updated to match the stylesheet in the target project. Disable this option to instead retain the original formatting from the source text and strip stylesheets from the pasted text.

By example: some text is copied from Project A, which has a style called “Block Quote” in it using a 3cm left indent. The text is pasted into a different project that also has a “Block Quote” style, but in this case with a 1.27cm left indent. The pasted text will have its formatting updated to have a 1.27cm indent (and any other variations that are set by that style). With this option disabled, the pasted text would retain its 3cm left indent but no longer be considered a “Block Quote”.

### Limitations

This capability only functions when pasting text from one project into another, not from any other source of styled text. Further, an important distinction to be aware of is that if you use the **File ▶ Save As...** command, use two projects derived from the same template, or any other form of duplication with your file manager, then for the purposes of this feature they will be considered the same project.

## Plain Text

Plain text files are considered those that do not have some form of recognised formatting typed into them. For example, .html, .opml and even .rtf files for that matter are technically plain text files, but Scrivener will import them as formatted text rather than the raw codes used to mark the text as formatted.

**Imported plain text files use font...** When importing plain text files (usually they have a .txt file extension, but Scrivener will assume any file without

an extension is a plain-text file) you can have Scrivener either apply the current default formatting, or optionally use a special font for these files.

**Plain text import formats** In addition to treating any file without an extension as plain text, Scrivener defines a number of common file formats as plain text out of the box: .markdown, .md, .mmd, .tex and .xml.

Use this table to add your own extensions to the recognised file list. There is no need to specify the ‘dot’ in the extension list, just the letters (xml not .xml). This option can be useful if a file is being converted to rich text and you would rather it not be. For example, if you add ‘html’ to the list, Scrivener will import the raw HTML code into the text editor rather than handling it as a web page. The other effect is to have the importer recognise formats as plain text even if the operating system considers them special. The default .log extension is one of these, which will import as a read-only research document otherwise.

## HTML

**Convert HTML files to...** Influences how .html (or .htm) files will be handled when importing them into a project binder. The “WebArchives” option will package the document into Apple’s WebArchive format, which is viewable in many applications and will retain much of the document’s original formatting.

The “Text” setting will preserve basic formatting and allow editing, but complex page formatting will be lost. You can convert individually imported web documents to text at any time with the **Documents ▶ Convert ▶ Web Page to Text** menu command.

**Convert imported WebArchives and web pages to text** You can also have imported web pages (via the **File ▶ Import ▶ Web Page...** command), or WebArchives files imported off of the disk, converted to rich text as well.

### Cross-Platform Compatibility

If you plan to make project resources available cross-platform between iOS, Windows or macOS, you should use the “Text” option in both cases. Since this option converts the web file to Scrivener’s internal rich formatting, it will at that point be the same as any other text document in your binder. Another alternative is to save the page as a PDF from your web browser.

## OPML

When OPML files are dropped into the binder, Scrivener will attempt to convert these outlines into Scrivener outlines. This can be useful if you do your initial brainstorming in a dedicated outliner application.

**Import outline into main text** For those outliners that treat the outline like a folding text editor—where each paragraph is an outline node and there are no formal headings separate from content—this option will cause the content of the outline to be imported into the main editor, leaving all binder item headings empty.

This option will disable the folding setting. All notes, if any exist, will be imported as document notes.

**Import notes into...** Some applications support adding notes to each outline heading. If such notes exist, this setting will determine how these notes will be inserted into the binder items: as the synopsis, main text, or the document notes.

When converting OPML notes into main text, all imported item types will use the document text type, so that you can more easily see the imported main text. The other two options will use folders for parent items.

**Create folder to hold imported OPML items** Enable this option if you want dropped OPML structures to be contained inside of a new folder, rather than being generated directly into your existing Binder structure at the selected point of import.

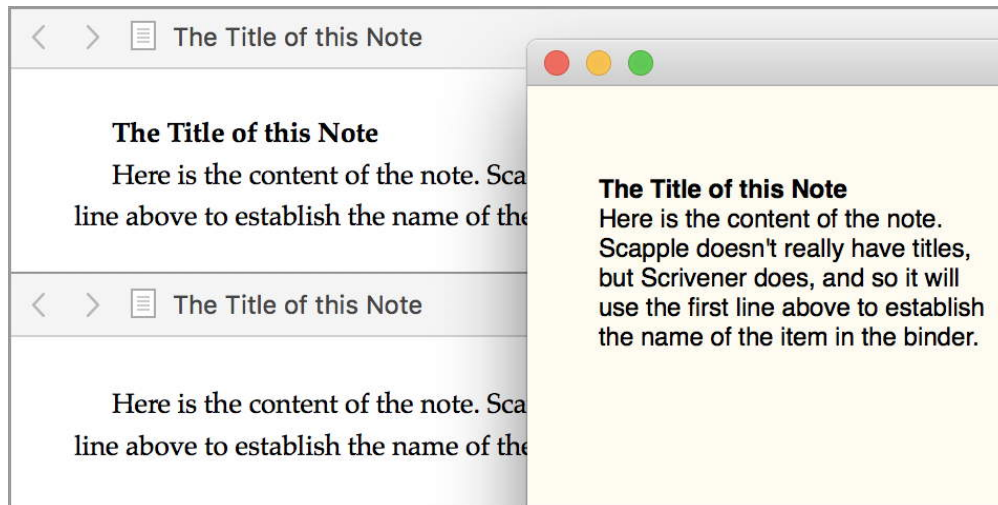
## Scapple

**Import first lines of notes as titles only** In all cases, when dragging Scapple notes into Scrivener the first line of each note will be used to establish the binder title for each item created from the imported Scapple notes. With this option enabled, that first line of text will also be removed from the imported main text, as shown in the lower editor example in [Figure B.22](#). If the note consists of only one line then it will not be removed.

## B.8.2 Export

### Rich Text

**Resolution for PDF images converted to PNG** Since most word processing formats do not support embedded PDF files, any PDF graphics that have been embedded in Scrivener's text editor will be converted to PNG raster graphics upon compile.



**Figure B.22** Scapple notes can have the first line treated as a title upon import.

This option lets you determine what resolution the PNG should be set to. The default of 150 dpi (dots per inch) is a common standard in the publishing industry for simple illustrations and will ensure a large enough intermediate format for converting vector graphics to raster graphics with a balance between quality drop and file size. You can tune this upward if the resulting graphics are still not to your requirements and appear blurry, or if you have been instructed otherwise by the publisher.

**Convert underscores to underlines when converting Markdown** When compiling to a rich text format, it is possible to convert Markdown found in titles or even text and notes. With these options enabled, Scrivener will convert underscore formatting (`_underline markers_` as opposed to `*asterisk markers*`) to underlined text instead of italics. It is important to note that MultiMarkdown, Pandoc and most other popular Markdown-based conversion systems will treat underline markers as synonymous with asterisk and produce emphasis styling (commonly italics), so use of this setting can produce different results between rich text output and MMD-based output if one uses the same source document for multiple compile formats.

**Include image file names for Nisus Writer (RTF only)** If your primary word processor is Nisus Writer Pro, or you work with someone on a Mac who uses it, this option will add the names of images to their internal metadata. This option has no impact in other word processors to date, so it is safe to leave it on unless you encounter compatibility warnings with it.

**Do not include stylesheet information** By default, any styles you apply to text either in the editor, or automatically as part of your compile settings, will be defined in the output file if the format supports stylesheets. If you primarily use stylesheets for your own purposes, or use a word processor that

doesn't support them cleanly, then enable this checkbox to strip them out of the files.

## HTML

These settings will affect the manner in which compile produces HTML and WebArchive files, but not the MultiMarkdown HTML format, as that uses its own system.

**Document type** Refers to the web standard, or DocType, that should be used during export. If you are unfamiliar with web standards, chances are the default setting of the older “HTML 4.01 Strict” will suffice. If you intend to publish your writings within a modern blogging system, however, in most cases using one of the modern XHTML formats will be more compatible. If you require HTML5, consider using the MultiMarkdown workflow.

**Styling** Determines whether and how Cascading Style Sheets (CSS) should be embedded into the compiled web file.

- *Embedded CSS*: declares CSS styles in the head of the exported file, allowing you to easily adjust them with your own custom stylesheets.
- *Inline CSS*: places styling directly into the HTML elements themselves, and so is useful in situations where you wish to override default stylesheets.
- *No CSS*: in many blogging and content management systems, all presentation formatting is already handled for you, and this will be the best option. Text editor and compile formatting will be irrelevant.

**Preserve white space** Attempts to preserve tab characters by wrapping them in a style that declares them to be “pre-formatted” (<pre>). Although this technique may not work in all browsers, it is generally safe to leave it enabled. It has been known to cause some e-readers to break formatting.

**MultiMarkdown export language** The MultiMarkdown engine will handle the conversion of typography for you, which is particularly useful if you intend to keep your source documents ASCII compatible. These are language specific, so choose the language converter most appropriate to what you are writing in. This will insert a “Quotes Language” metadata key into the MMD metadata block. If you supply your own such key by hand in your compile settings then the compiler will defer to your request.

If you make use of Scrivener's smart quote feature this setting will be of no impact to you, as the form of punctuation will be hard-coded into the text as Unicode characters. For maximum flexibility you should straighten quotes in your compile settings, or not use them in the first place when working with Markdown-based systems.

**JPEG images compression** Use the slider to adjust the amount of compression used when either embedding images in the file (for rich text formats) or compiling JPEGs as loose files with HTML and Markdown-based formats. The “Min” (left) slider position will result in the best quality images, at the expense of file size (better for print). The “Max” (right) slider position compresses images as much as possible, resulting in smaller file sizes (better for online or e-publishing).

### B.8.3 Sync

Concerns the automatic import/export and merging of documents when working with Scrivener for iOS ([section 14.2](#)) or using Synchronised Folders ([section 14.3](#)).

#### Mobile Sync

These options pertain to how modifications, made with the mobile version of Scrivener, will be merged into the project. “Sync” in this context refers to the merging of changes made to a project, no matter how that project may have arrived on your computer, not the process itself that would do so. These options thus even have an impact when the project was zipped and emailed to you.

#### Place documents affected by sync into a “Synced Documents” collection

Created the first time you sync, this collection will continue to be refreshed every time the project is synced. If you would prefer this list not be created or updated, disable this option. You can also “freeze” the list by cloning a new collection ([section 10.2.2](#)).

**Automatically show the “Synced Documents” collection after sync** Enable this option if you would prefer to address synced documents immediately upon syncing, by having the binder sidebar replaced by this collection list.

**Take snapshots of updated documents** Documents that have been modified in the mobile version will have a snapshot taken of them directly before merging changes. Given that mobile Scrivener has no snapshot capability of its own, this feature can stand in for that, ensuring a remote editing session has dedicated snapshots on each edited item.

Be aware that every single sync will cause a snapshot to be created for each edited binder item. Over time these can accumulate, bloating the size of your project, and potentially slowing down sync from the device. It might be a good idea to prune them every once in a while with the Snapshots Manager ([section 15.8.5](#)).

**Check for changes every...** If a project is left open on your computer while you take it mobile, this setting will cause the software to periodically check the internal state of each open project for incoming mobile edits (which will of



course arrive automatically if Dropbox is left running and you sync while working on the go).

Lowering the check rate will decrease the odds of accidentally conflicting the project, at the expense of using additional resources (and battery power if that is a concern) for each project you leave open. If you do not use Scrivener for iOS or never sync directly with it, preferring file management utilities, then you should switch this off to conserve power.

Projects will *always* be checked when their windows are brought to the foreground. This check is mainly a protection for those cases where the foremost window on your computer is the very same project you are editing with your mobile device.

## External Folder Sync

**Remove stylesheet information when syncing with a folder** Given that this option will inevitably destroy any stylesheet assignments you make using Scrivener's editor, it will mainly only be of interest to those who prefer not to use stylesheets at all, and wish to ensure that any edits coming in from the synced files are likewise cleaned of them.

### Convert text inside (( )) and {{ }} to inline notes when syncing plain text

When syncing with plain text files, your inline annotation and footnotes will be enclosed within special brackets. These brackets will be searched for when you sync back, converting text found within them to notation format again in Scrivener. The brackets used are:

```
((Text of inline annotation))
{{Text of inline footnote}}
```

You can type in these brackets in the external files to add new notes to your text while on the go. Because this only works with inline notation, you will need to convert your inspector comments and footnotes to inline if you intend to take advantage of this feature.

## B.8.4 Conversion

The settings in this tab alter how word processing documents will be converted to and from Scrivener's core internal format, RTF. You should not ordinarily need to change these settings, but if you run into compatibility or performance issues relating to conversion, check back here for a few troubleshooting options.

**Use Java converters for .docx** This checkbox sets the conversion engine used for all forms of import and export activity, including drag & drop into the binder, bulk file import, export, and compilation for the DOCX. In most



cases you will want to leave this option disabled, as Scrivener's native DOCX engine is much faster.

You will need to have a functional Java installation on your Mac to enable this setting.

**Microsoft .doc** This setting is only available if Java cannot be found on your system. In most cases, you will want to leave this set to the default: RTF-based .doc file. Scrivener's RTF export engine supports a great many features that macOS' built-in exporter does not.

However, if you are working with an application that cannot read RTF files at all, and cannot install Java to get a higher quality .doc file, you will want to change this option to use the standard macOS exporter. This will reduce the quality of the document.

**Use Word-2011 compatible copy** If checked, copying and pasting from Scrivener into Word 2011+ will use true footnotes and comments. Having this feature enabled can reduce the quality of copy and paste between Scrivener and other native macOS software.

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## B.9 Backup



**Figure B.23** The Backup settings pane

Scrivener has a fully automated backup system that keeps individual self-contained mirror copies of your project, set aside in case you should ever need to roll back to a previous version of the project. The options in this tab will control the various aspects of whether, and how these copies are created. Individual projects can override some of these settings in the Project Settings: Backup pane ([section C.9](#)).

**Turn on automatic backups** Enables the automated backup system. It is best to leave this turned on, unless for performance or security reasons you wish to control the process manually ([subsection 5.2.2](#)). Individual projects can opt out of backups in Project Settings.

**Back up on project open** Whenever a project is opened, a backup will be created before you can begin working. This can slow down load times with large projects, but ensures you have a snapshot of how things were before you started a session.

**Back up on project close** Whenever a project is closed (either directly or via application shutdown), a backup will be created. This can slow down close times in large projects, but ensures you have a snapshot of how things were when you concluded a session. When combined with the above option, you will have a complete before/after pair for each session.<sup>9</sup>

**Back up with each manual save** Have the software create a backup copy whenever you manually save a project with **File ▶ Save (⌘ S)**.

**Back up before syncing with mobile devices** When opening and syncing changes made with Scrivener for iOS, a backup will be created directly prior to sync. This backup will contain the project as it stood before syncing the mobile change logs with the formal project. This option is enabled by default, but will be of no impact to you unless you work with Scrivener mobile.

**Compress automatic backups as zip files (slower)** If you are storing your backups on a network drive, or Internet synchronised service like DropBox, this option will not only save space and reduce data usage when uploading, but will protect the project format from the sorts of damages which can occur when lots of files are transferred over the Internet. However, it will adversely affect the performance of your backups, as Scrivener not only has to collect and assemble a copy of the project, but compress it as well, before letting you return to your work. With very large projects, this can take many minutes to complete, and turning it off can save a lot of time.

**Use date in backup file names** Causes backups to be saved with the current date and time, making it easier to sort by recency in the Finder. It also means each backup filename will be unique, which could be of use with an external backup system. Be aware that with this setting off, Scrivener will rotate through a set number of serialised file names, which means the most recent copy may not be the one with the largest number.

**Only keep *n* most recent backups** To avoid the proliferation of hundreds of backups, a limiter is employed, which will restrict the number of backups to five copies, by default. Once this amount is reached, it will remove the oldest backup to make space for the new one. You may find this needs adjusting if your work habits cause backups to overwrite each other too quickly. As a rule of thumb, it is good idea to have *at least* three or four days of backups available.

If you would rather Scrivener never delete old backups, disable the feature with the checkbox.

---

<sup>9</sup> And you should probably in that case consider saving more than five copies total, via the **Only keep *n* most recent backups** setting.

**Backup location** Determines the folder where automatic backups will be maintained. If you would prefer these backups be kept somewhere more visible, or in a synchronised folder, external drive, or secured area, click the **Choose...** button and use the folder navigator to select the destination folder. If you choose a location that later becomes invalid (a common example is external drives), Scrivener will immediately warn you as soon as it tries to back anything up.

As a convenience, you can quickly access the backup folder by clicking the **Open backup folder...** button.

**Backups should never be mixed with working projects!**

In recent years we have noted a growing trend of people storing their automatic backups in the same location where they keep their live projects. This is an extremely risky way of working, and there is no advantage in doing so. A warning has been added to the software when it detects this is what you are doing. Ideally, your backup folder should be kept as far out of harm's way as possible. Our defaults place them in hidden folders for this reason.

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# | **Project Settings**



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Where application Settings adjust how all projects and the software itself functions, individual projects have their own settings as well, which can in some cases override global settings. We carefully designed our built-in templates and even the blank starter to be as broadly useful as possible out of the box as possible. You might never even need the stuff in this appendix! But if you like to tinker, as usual, we've got you covered.

**Project appearance and behaviour settings**

In addition to the settings found within this pane, most settings that pertain to how a project looks or in some cases behaves, are found in the menus that have an impact on the appearance or functioning of a project window, like **View ▶ Outline ▶ Show Subdocument Counts in Binder**. If you're looking to modify a particular aspect of how the project works, and don't find an option here, then consult the general documentation on the feature. Tips on configuration are often grouped together toward the bottom of these sections.

To open the Project Settings panel:

1. Use the **Project ▶ Project Settings...** menu command, or the **⌘⌘**, shortcut.
2. You may also end up in this panel if you use the “Edit...” options from some of the various inspector tools that tie back to a specific tab within it. For example if you select “Edit...” from the bottom of the Label selector at the bottom of the inspector, you'll be taken to the Label List tab in project settings.

Once you have made all of the changes you require, click the **OK** button (or press **Return**) to save them into the project. Otherwise click **Cancel** (or press **Esc**) to discard the changes you've made.

**Save yourself setup time with project templates**

If you find yourself changing a number of these to the same sorts of settings every time you start a new project, you should consider creating a starter project template, with your preferred settings already set up and ready to go ([subsection 5.4.3](#)). Many of the built-in templates will have some changes made to their settings for you, particularly in the Section Types tab.

## C.1 Copying Settings Between Projects

Several of the panels in the Project Settings window can share their settings with other projects via drag and drop, or copy and paste. In most cases, all you need to do is open settings for both projects at once, and drag and drop items between respective panes. For example, you can use the **⌘A** shortcut to select all of the labels in a project and then drag those labels into another project's label list.

Here are the panels that can share settings, and any notes pertaining to them (if you do not see a section in the list then its settings cannot be transferred between projects):

- *Section Types*: considering the complexity of the second pane, you cannot drag and drop settings. You can export and import settings as files however. Refer to Transferring Section Types Between Projects ([subsection C.2.4](#)) for tips.
- *Label List*: supports dragging and copy/paste. When importing duplicate names, you will be asked if you wish to create new labels out of them, or simply update the colour assignments in the target project.
- *Status List*: supports dragging and copy/paste.
- *Custom Metadata*: supports dragging. All settings associated with the fields will be copied along to the target project. Duplicate field names are allowed, so if you import fields with existing names they won't update or change existing fields, instead creating new fields.
- *Auto-Complete List*: supports dragging and copy/paste. Entries that have both the same term and scope will be ignored as duplicates. If the same phrase exists in a different scope from the target project, it will be added under the dropped scope.
- While not related to project settings directly, a form of setting you will probably be interested in copying as well is a project's stylesheet. Doing so before you copy text is essential to keeping its style assignments intact. For further information, refer to Copying Stylesheets Between Projects ([section 17.5](#)).

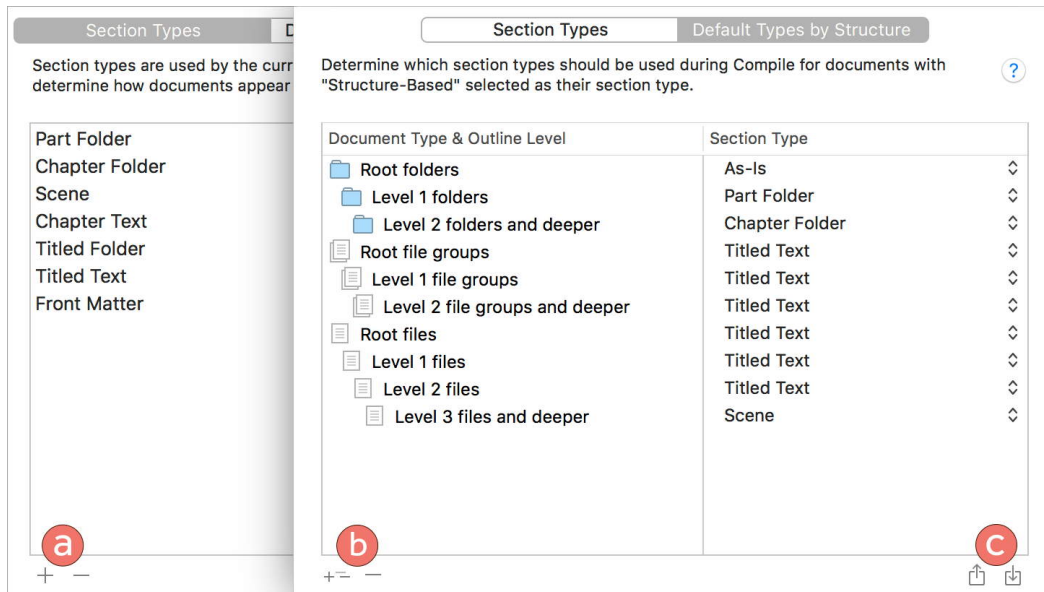
## C.2 Section Types

This panel ([Figure C.1](#)) is the dictionary by which you'll define items as having a *type*, in the binder. When a particular folder is set to export a chapter heading—perhaps using its name as the visible title of the chapter for the reader's benefit—it is in this panel that you'll have a type listed as “Chapter”. This is also the place where you will design how these types can be automatically applied to the folders, files and file groups in your binder; you needn't remember to assign “Chapter” to each and every folder you create, you can instead state that all folders ought to act like chapters by default.

### Types are not formatting, yet...

It is good to be aware of the differences between calling something a thing, and then formatting that thing based on what it is. Everything we do in this section has nothing directly to do with what your compiled file will look like, and you'll find not a single shred of formatting in this pane. All we are doing is setting up a framework for how items can be referred to as we write. Later on we can get into what these types actually look like.





**Figure C.1** The Section Type settings used by the “Novel (with Parts)” project template.

If this is your first time playing with Section Type settings in this panel, you might want to start with some very basic settings. I would recommend creating a project using a blank starter to experiment with.<sup>1</sup>

#### See Also...

- Section Types ([section 7.6](#)): a basic introduction to the usage of section types in a project.
- Project Settings ([section C.2](#)): how to set up section types in your project settings, and optionally configure how they will be automatically assigned to items in the outline structure.
- Section Layouts ([section 23.3](#)): how they will end up being used when compiling your draft to a final format.
- You can search the project for all documents of a particular type with Project Search ([section 11.1](#)), and filter the outliner and corkboard likewise ([subsection 11.4.3](#)).
- If you’d prefer a more hands-on approach, the Interactive Tutorial, available from the **Help** menu, also contains a step-by-step guide to building a simple set of section types and then learning how to compile with them. We also have video tutorials available [on our site](#).

<sup>1</sup> For things like this, I like to create “throwaway” projects on the Desktop. When I’m done experimenting, I can close it and delete it.









## C.2.1 What Are These Levels?

At the most basic level (pun intended), if you want all folders to print a certain way when compiling then click in the “Section Type” column to the right of the “All folders” listing and choose the desired type from the dropdown menu (you’ll find the Blank starter project already has a sensible assignment of “Heading” for all folders). If you click **OK** on the Project Settings panel now and examined a few folders, you should find they are now assigned to the Section Type (assuming you hadn’t manually set them to something else beforehand).

### Upgrading from Scrivener 2

If you’re a veteran to Scrivener, you’re probably familiar with the “Formatting compile option pane” in the previous version, and you might already be seeing some similarities between how that pane worked and what you’re seeing in the second tab. They in fact work very similarly (and you can probably skip to the next section ([subsection C.2.4](#)) if you’re a pro at it)—where in the Formatting pane you were assigning the formatting directly to levels as compile settings, now you will be assigning abstract *types* to levels, and not worrying about the formatting until later when you compile.

There are numerous advantages to this new method, and you should find most of it works how you’ve grown used to using this kind of tool in the past. The only important difference to be aware of is that there is a new top level “root” that is higher than level 1. We’ll explain what that means below, but be aware that a “Level 1 folder” still means what it did before: the level of folders, files or file groups directly beneath the Draft folder.

Document Type & Outline Level	Section Type
 Root folders	Heading 
 Level 1 folders and deeper	Heading 
 All file groups	Section 
 All files	Section 

**Figure C.2** The result of adding a new level to the folder row.

Some projects are going to need a little more than that however, so let’s take a look at what levels add to the mix: select the folder row again and click on the “Add Level” button beneath the point marked (b) in [Figure C.1](#). The original row will be renamed to “Root folders”, and a new row will be indented beneath it, labelled “Level 1 folders and deeper”. If you have a little hierarchy in your binder to play with, you will note that the top level folders in your binder (such as “Draft” and “Research”) are no longer highlighted in yellow while this row is selected. If you add another level, this row will be renamed to “Level 1 folders”,

and the new row will be “Level 2 folders and deeper”. The most indented row will always affect all of the indent levels beneath.

Document Type & Outline Level	Section Type
Root folders	Root level
Level 1 folders	Level 1
Level 2 folders	Level 2
Level 3 folders	Level 3
Level 4 folders and deeper	Level 4+

< > Draft folder = root		
Title	Section Type	
▼ Red Folder	Level 1	▼
▼ Pink Folder	Level 2	▼
Pink page	Level 3	▼
▼ Blue Folder	Level 2	▼
Blue page	Level 3	▼
Green Page	Level 4	▼
▼ Orange Folder	Level 4+	▼
Orange Page	Level 4+	▼
Red Page	Level 2	▼
White page	Level 1	▼

**Figure C.3** How levels in the structure panel relate to indented items in the binder.

In the upper section of our second example (Figure C.3)<sup>2</sup> we have an excerpt of the settings (file groups and files have the same assignments, so they are omitted to save space) using some example section types literally named “Level 1”, “Level 2” and so forth, and have then applied these section types to their matching level depths. Below the rule we have an outliner view set up to show the “Section Type” column (View ► Outliner Options ► Section Type),<sup>3</sup> and a few files, folders and file groups at different levels to better demonstrate how indenting items in the

<sup>2</sup> To play with this sample project, download the Extras Pack (Appendix G) from our website and look for a project called: “2-sectiontypes-simpleexample.scriv”.

<sup>3</sup> If you’re curious as to how it got so colourful, we’re using the View ► Use Label Color In ► Outliner Rows option along with some labels assigned to these items.

outline means changing their level, and thus changing their corresponding section type assignment.

These settings probably wouldn't be very useful to any real-world projects, but with each level assignment clearly labelled by its number, you can see how "Pink page" being indented beneath the level 2 "Pink folder" makes it a level 3 file. The "Blue page" on level 3 is a file group, indicated by the stack of paper icon, since "Green page" on level 4 is indented beneath it. The two "Orange" items are on level 4 and 5, but since we only defined up to four levels of depth, "Orange Page" uses the same assignment.

If you have opened the sample project, take a moment to move items around and add a few of your own; see how these section assignments change in real-time within the "Section Type" column. You could also try clicking into the section type cell for one of the items and setting it to something else manually. It will be printed in regular full black text and no matter where you place the file, it will always use the assignment you gave it.

## C.2.2 Section Types Tab

The first tab in this pane contains a simple list of every type defined in the project. Some projects may only need a couple of types, others may require dozens. The list of types is the "menu" from which we can describe how individual items are to be thought of. Is it a "Chapter Heading", or a "Short Story"? Or maybe it is just an "Equation" or "Glossary Entry" in an "Appendix". These are all examples of *Types*.

- To create a type, click the **+** button, marked beneath (a) in [Figure C.1](#). Type in the name of the type as you would like for it to appear throughout the project, and press **Return** to commit the name.
- Change the order in which types will appear in various menus and the compile interface with drag and drop. This has no consequence other than how you will see them listed.
- To remove types, select them from the list and then click the **–** button, also under (a). If any items in the binder have been assigned to the deleted type, they will fall back to whatever automatic assignment they would have had otherwise.

No warnings will be given when deleting types, but if you make a mistake remember you can always click the **Cancel** button on the Project Settings pane, and try again.

## C.2.3 Default Types by Structure

Within the second tab is where we can optionally take the types created in the first tab and assign them to icon types, so that we don't have to do that manually

ourselves as we develop the draft. At its most basic you'll find three rows corresponding to the three core binder item types that can be found in the draft: folders, file groups, and text files. If you leave it at that, you can have up to three automatic assignments in your project based on these types. In fact the blank starter only distinguishes between two types, treating file groups identically to files. Here is how to use this tab:

- Select a row to make changes to a particular level and icon. Corresponding levels that match this description will be highlighted in yellow in the binder, making it easy to see what parts of the draft you'll be impacting with your settings. With a row selected:
  - Click the “Add level” button, under the (b) marker, to create a new row indented beneath the selected row. It will copy the selected type assignment for your convenience.
  - Click the – button to remove that row from the table. If there were indented levels beneath the deleted row, their assignments will simply move “up” a level, rather than being deleted as well.
  - The last row for a category of icon cannot be deleted. If you don't intend to use a particular category, like file groups, you can safely ignore them in the pane.
- Click into any of the dropdown fields in the “Section Types” column to change an assignment for that row.
- You can assign section types to multiple rows, and indeed that might often be exactly what you need. For example maybe you want file levels 2–3 to act like normal scenes, but leave the 4th level to print without any scene separators, thus making it possible to break your scenes down into even smaller pieces than what the reader will be aware of as they read through the text.

### C.2.4 Transferring Section Types Between Projects

Owing to the potential complexity of the second tab, it is not possible to drag and drop settings between projects. You can however save your settings into a file which can be shared with others or transferred between your own projects.

- To export your settings to a file:
  1. Click the “Export” button, on the left side under the (c) marker in [Figure C.1](#).
  2. Choose a name and location to save the .scrtypes file to your disk.
  3. Click **Save**.

- Importing settings will *replace* all of the existing section types in the first tab, and all of the section type assignments in the second tab. There is no way to combine settings. To replace the settings in your project with those found in a saved file:
  1. Click the “Import” button, on the right side under the (c) marker.
  2. Select the .scrtypes file from its location on your disk and click the **Open** button.
  3. You will receive a confirmation about this action replacing your existing settings completely. Click **OK** to proceed—and remember nothing is truly set in stone until you click **OK** on the whole Project Settings panel, too.

Lastly, if you are primarily interested in just using the same settings for every new project you create, consider creating your own project template with the settings already established. It’s easy to do, and will save you a lot of time for all of the many other tweaks that can be made to a project as well ([subsection 5.4.3](#)).

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## C.3 Label List & Status List

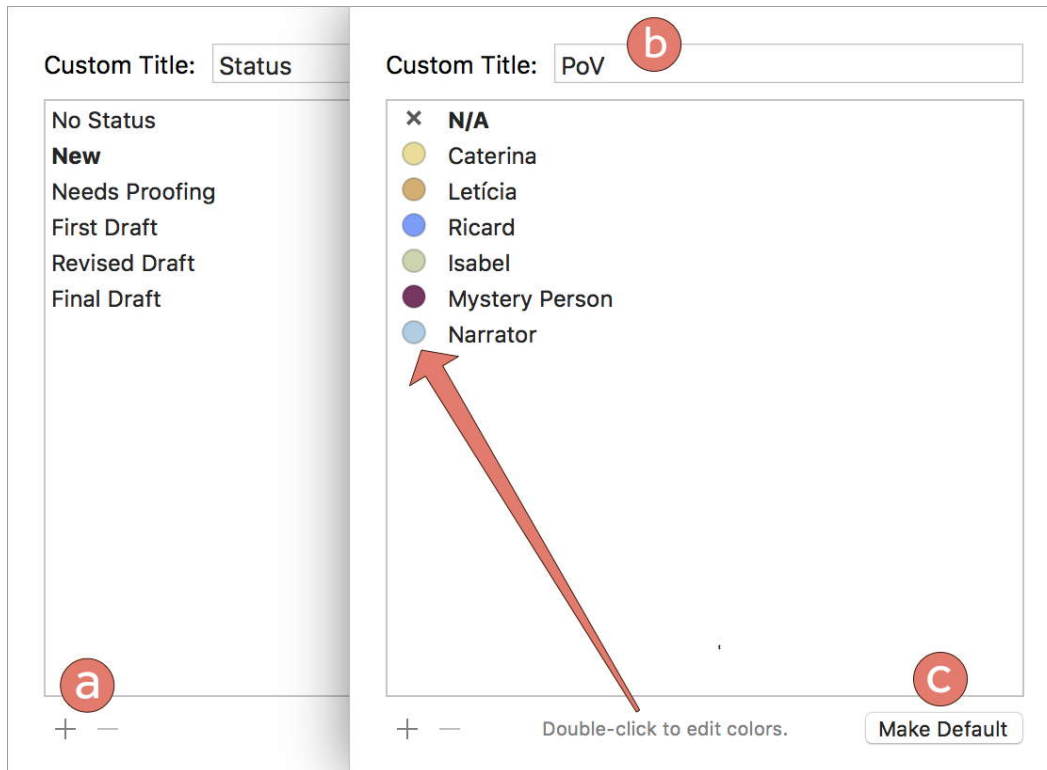
The next two panes are similar enough in their usage and purpose that we can take a look at their usage as one. The only difference between labels and status is that the former also associates a *colour* with an item, and that can of course be configured in its respective pane.

### C.3.1 Managing Labels and Status

In the central portion of each pane ([Figure C.4](#)) we have a list of labels and status entries for the project—these are what you will see in the selection menus for items. We provide a few generic entries to get you started, but these can all be changed or removed as you require.

**Custom Title**, marked (b) in the figure, is for modifying how this field is referred to throughout most areas of the project; your choice here will even impact how some menu names are printed. If you change “Label” to “PoV” as demonstrated, then by way of example the submenu, “**View ▶ Use Label Color in**” becomes, “**View ▶ Use PoV Color in**”.

- To add or remove entries: you will find the traditional **+** and **–** buttons, marked (a) in the figure.
- With an entry selected in the list, the **Return** key can also be used to create new entries.



**Figure C.4** Status and Label List panes are where you modify available values.

- Entries can be removed with the **Delete** key.
- To edit an existing entry: double-click on the text of it, and use **Return** to confirm the changes.
- To alter the colour of a label: double-click the colour disk alongside the label you wish to modify (indicated by an arrow in the figure), and select a colour using the palette.
- Drag and drop to move an entry from one place to another within the list. This adjusts the order of the items as you see them in menus.
- Multiple entries can be selected at once, for bulk removal or drags, using the typical mechanisms for doing so: **Command** and **Shift** click.

### C.3.2 Defaults and Fallbacks

In both lists there is one entry (“No Label” and “No Status”) that cannot be removed. This is a fallback, or what will be printed whenever an item doesn’t have a label or status. You can change the name of this entry by double-clicking on the text of it, just as with a normal label or status (in the example figure, we’ve changed our example to “N/A”, for indicating that the item isn’t applicable to a PoV assignment—maybe it is a page of research). For labels, this entry cannot have a colour assigned to it, and so that space will otherwise display an “X”.



You can also adjust the status or label to be assigned to newly created items as defaults:<sup>4</sup>

1. Select the entry you wish to make a default (we selected “New” in our Status example).
2. Click the **Make Default** button, marked (c).

The current default for this project will be displayed in boldface within the list. So in our example here, all new items will have a status of “New”, and a PoV of “N/A”.

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## C.4 Custom Metadata

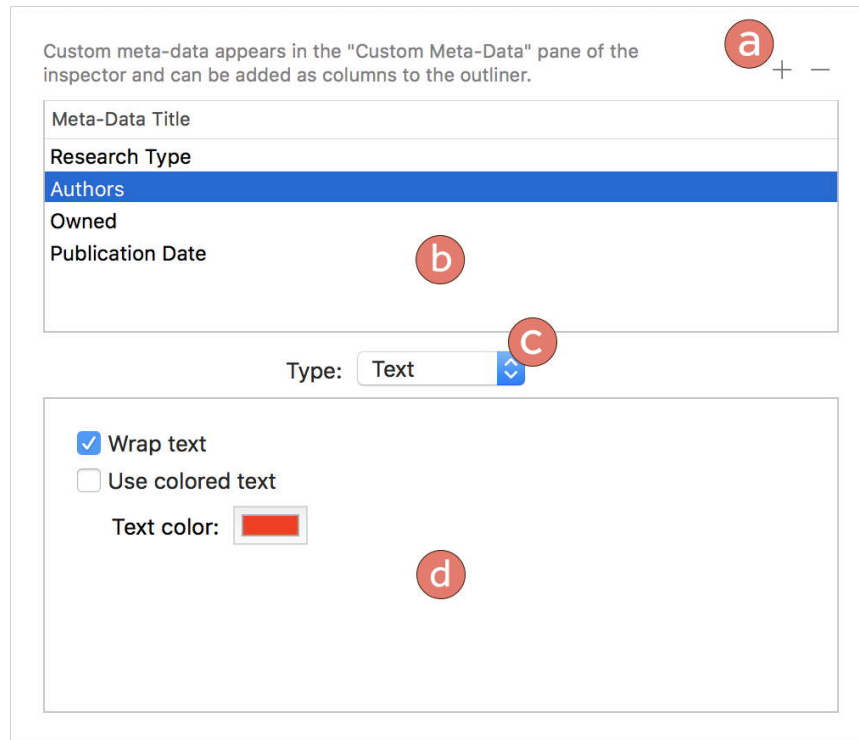
When Scrivener’s built-in metadata features aren’t enough, custom metadata is the way to create your own new fields from a variety of types to choose from. These fields are most easily accessed through the inspector’s metadata tab, where a panel presents your custom fields in a form, and in the outliner, where they can be added as columns. Custom fields can also be searched for in Project Search ([section II.1](#)), when filtering in the outliner and corkboard ([section II.4](#)) and as an optional way of filtering what will be compiled. All around you should find they integrate fully with the project and enable you to add your own “features” as need be.

The settings pane is divided into two basic components ([Figure C.5](#)). In our example, we could imagine someone is storing a list of books they would like to acquire:

- *The metadata field list:* the area marked (b) in the figure, is a list of fields by title, this area of the pane works similar to the label and status areas in how you can create, delete, reorganise and rename fields.
  - Double-click the names of items to rename them, then press **Return** to confirm.
  - Drag and drop fields to change their ordering in the inspector, wherever displayed in menu lists (for example in the **View ▶ Outliner Options ▶** submenu) and lastly the order used for exporting, printing or compiling with metadata.

---

<sup>4</sup> The only exceptions are those cases where the new item was created from another (such as when duplicating items, splitting the text in two or when importing items from another project); in that case the original label or status values will be used.



**Figure C.5** Custom Metadata pane, showing an example “text” field.

- *Field settings*: the area marked (d), will change depending upon what *type* of field you have selected at the time. When multiple fields have been selected, only the settings for the first field will be displayed, but all selected fields will be impacted by the settings you make.

### C.4.1 Adding Fields

1. Optionally select an existing field to insert beneath, then click the **+** under the (a) marker, or press the **Return** key.
2. Type in the name of the field, and click anywhere else to confirm.
3. From the **Type** field, marked (c), select what type of field this should be:
  - *Text*: a simple plain-text field, useful for storing information that doesn’t often repeat, like descriptions or in the case of this example, the authors of the material we are tracking.
  - *Checkbox*: it works just like all of the other checkboxes you’ve ever encountered. In this case we’re using one to track whether we own the book yet.
  - *List*: this functions similarly to how the Status field works: you can create a simple list of choices to select from on a per-item basis. In

this example, we're using this to track "Research Type"; whether it is a book, article, etc.

- *Date*: with this field you can type in date and time stamps, or select dates from a handy calendar.
4. Finally, set up how the field should work, in the area marked (d). Each type of metadata field has its own settings, consult the following documentation for each.

## C.4.2 Deleting Fields

1. Select the fields you wish to delete. As normal, you can use the **Shift** and **Cmd** to select multiple items.
2. Click the — button marked under (a), or hit the **Delete** key.
- 3.

### See Also...

- Overview: how custom metadata ([subsection 10.4.4](#)) can benefit your work.
- Settings: adjusting the available fields and their settings, in project settings ([section C.4](#)).
- Inspector: editing custom metadata on a per-item basis with a form built into the inspector ([subsection 13.5.2](#)).
- You can use list and checkbox type fields to filter outliner & corkboard views ([section 11.4](#)).

## C.4.3 Text Fields

Text fields are very simple plain text, and will work best with information that tends to vary from one item to the next. If you intend to use information that repeats frequently, lists might make for a better type of field.

The text field type ([Figure C.5](#)) has the following settings available:

**Wrap text** When a text field is set to wrap, it will expand the height of the field as necessary to display all of the text entered into it. In the inspector, this will push down any form fields below it, and likewise in the outliner, the height of the row will be increased to make space for the text (much like it does for the synopsis).

When unwrapped, only the first line of text will be shown, after which you will need to click into the field to view and edit the rest of it.

**Use Colored Text** When checked, the **Text Color** selection tool below will be enabled; click into the colour swatch to open the palette and select a colour. The text you type into this field will be coloured in both the outliner and the inspector. The colour will also be used when printing or compiling with metadata visible, though in that case it will be used to colour the field name, rather than the text itself.

### C.4.4 Checkbox Fields

Checkboxes are simple on/off switches that you can add to your items. They will be useful for cases where a condition is either true or false, and can be set to either be ticked by default or not.

**Tick by default** Sets the default condition of the checkbox for all items which haven't at any point in the past been set one way or another. Whenever you click a checkbox, the result will be to toggle whether it is on or off, and doing so explicitly sets that condition to the item. It will no longer be impacted by default settings. Items that have never been adjusted one way or the other will dynamically change depending upon this setting, even retroactively.

### C.4.5 List Fields

Type: List

"None" item title: Miscellaneous

List Items

- Paper
- Article
- Book
- Digital

+ -

**Figure C.6** Custom list fields are best when the possible values tend to repeat, and are of a limited set.

Lists are fields that will present a dropdown box when clicked upon, offering you the choice between the different set values that you will define in this pane (Figure C.6).

The “None” item title entry at the top of the list will set what will be printed if an item has no assignment made to it yet. An empty value is permitted; be aware this will cause the dropdown menu to contain an empty slot at the top of it. All items, new and existing, will use this setting by default.

- To add a new list item:
  1. Optionally select the existing item you wish to insert the new entry after, and click the **+** button or press **Return**.
  2. Type in the text as it will appear throughout the project.
  3. Press **Return** to confirm.
- To remove selected items:
  1. Select the items you wish to remove (you can use **Cmd** and **Shift** clicking to select multiple items).
  2. Click the **–** to remove them from the list.
- To reorder items (you can select multiple items to drag them together) use simple drag and drop. This will impact their position in the dropdown menus.
- To rename an item, double-click the text field, type in the new text and press **Return**. Any items using this assigned value will print the revised text.

## C.4.6 Date Fields

Type: Date

Format: Custom

Custom Format: yyyy-MM-dd ?

☐ Ignore time zone changes

Custom date formats support patterns conforming to Unicode Technical Standard #35, e.g:

- Weekday: EEEE = Monday, EEE = Mon
- Day: d = 1, dd = 01
- Month: MMMM = January, MMM = Jan, MM = 01
- Year: yyyy = 2001, yy = 01
- Time: hh:mm:ss a = 6:05:59 PM, kk:mm = 18:05

**Figure C.7** Custom date fields work best when you need to record a conventional calendar date and time stamp.

For those cases where you need to record a conventional date in an item, the date field should do. If you are looking to record highly customised, historic or fictional dates, it might work best to use a regular text field instead, as this field will presume a modern time reckoning.

When using the date field in your project, you'll be able to type in dates using natural language to have Scrivener convert the text you type into a proper date and time stamp. It is not necessary to copy the format that is used to print the date when doing so, and indeed with custom formats the software will likely not recognise it unless it happens to be a fairly standard format. Refer to the Custom Metadata Pane ([subsection 13.5.2](#)) for more information on how to input dates into these fields.

**Format** From this dropdown you can select from your system's standard date and time formats. Choose between having a date (in a variety of forms), a date plus a time, or just the time. Lastly, there is a "Custom" option at the bottom which opens up the following option.

**Custom Format** Supply a text format using the provided tokens, which will appear when selecting the "Custom" setting in the **Format** dropdown ([Figure C.7](#)). In the provided example, the format string will result in a date stamp like this: "1984-04-01", or April the 1st of 1984.

If you are looking for other tokens to use than the few basic ones we have provided in the help text, click the "?" button to the right of the **Custom format** field. This will open a web page containing the complete list of tokens that are recognised by the software. The page itself is very long and technical, the only pertinent section is "Date Format Patterns", which your browser should load to automatically.

#### Date formats and cross-platform compatibility

Unfortunately it is not possible for us to support the full specification used by the macOS version of Scrivener, on Windows, but rather only a small subset of it. For most standard date formats you should find they will work cross-platform, but more exotic codes (such as Era and day of year) may not display properly when viewed on Windows.

**Ignore time zone changes** This option is always available, even when using a built-in format. By default the software will store the date with your current time zone embedded in the format. When you travel to another time zone, or if you live in a region where summer time is used, you'll find date stamps adjust to provide the equivalent in local time.

For cases where you want to store time abstractly, such as in a timeline of events, you might not want to have the dates and time shifting whenever you go on trip! Use this checkbox to have dates you enter recorded without time zone information. **This checkbox only impacts how new dates are recorded.** If you change this setting after having already entered a bunch of dates, the originals will go on acting as they have in the past.

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## C.5 Formatting

☐ Use footnote marker:  Make Default

If ticked, the marker will be used for inspector footnotes added to text with no selection.

☒ Use different default formatting for new documents in this project

These settings override those in Scrivener's Preferences.

Main Text Formatting: Use Current

Aa B / U a I 1.0

The trick to writing a compelling narrative is so simple it's often overlooked: invent a character the reader likes and make nasty or dangerous things happen to him or her.

- David Mitchell

☐ Different inline footnote font:

**Figure C.8** The Formatting pane in Project Settings is used to apply special settings to individual projects.

Projects all use a central set of preferences (established in the Editing: Formatting Setting tab ([subsection B.3.2](#))) for determining what formatting (font, paragraph spacing and indenting, tab stops and so forth) will be used in new documents you create within them. For cases where you have a project that needs its own settings, Project Settings gives you a way to override these two global settings, and meanwhile provides a few additional options not available elsewhere.

### Scriptwriting and Fonts

When using Scrivener to compose scripts, the font for the script will be selected for you based on the script settings, not the application settings or this panel. See Scriptwriting ([chapter 19](#)) for further details.

**Use footnote marker** This alternative form of referencing linked footnotes ([subsection 18.3.7](#)) will place a custom marker (as provided in the text field to the right) at the cursor, rather than highlighting existing text with the grey footnote link. Refer to Footnote Highlight Style ([section 18.3.7](#)) for further information and advice on how to use this feature.

**Main Text Formatting** This is where you can choose distinct formatting choices for this project, separate from those used by other projects globally. All aspects of text formatting will be overridden by the choices you



make here. To enable the remainder of this panel, tick the **Use different default formatting for new documents in this project**.

Use the mock editor to set up your preferred styling for this project. This works just like the similar setting in the Editing: Formatting (section B.3.2) settings pane.

The **Use Current** button provides a handy way of importing settings from any background text selections in the active editor. So if you've already set up a document to look the way you want it to, using this button can save some time.

**Different inline footnote font** As a subsidiary function of the above, this setting will additionally overrides the application setting for the inline footnote font. It will work even if you are not currently using custom font for footnotes in the main application Settings, but it will respect the secondary option in that pane, **Use inline footnotes font for inspector footnote too**. When that is enabled, the choice you make here will impact both types of footnote.

As with the global setting, this is primarily for your own personal preference, as the compiler can adjust the fonts of all footnotes to a uniform appearance. No need to squint at 9pt fonts in Scrivener, just because that's how they must print!

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## C.6 Auto-Complete List

Every project has its own stash for custom auto-completion phrases that you can make use of. By default these will never get in your way as you type (unless you are scriptwriting, where we find most scriptwriters prefer aggressive replacement suggestions), but rather will be shown after typing in a few letters and then pressing the completion shortcut, `⌘Esc`.

- *Add a new entry to the list*: select where you would like to insert the new entry, then click the **+** button, or press the **Return** key.
- *Removing entries*: select the row to remove and click the **–** button or press the **Delete** key on your keyboard.
- *Editing entries*:
  - Start editing a selected row by double-clicking on it.
  - Confirm editing by clicking outside of the field or pressing the **Return** or **Esc** key.

Words	Scope	
Behaviors: Double-Clicking	General Text	↕
Behaviors: Dragging & Dropping	General Text	↕
Behaviors: Folders & Files	General Text	↕
Behaviors: Navigation	General Text	↕
Behaviors: Playback	General Text	↕
Behaviors: Return Key	General Text	↕
Behaviors: Snapshots	General Text	↕
Behaviors: Transformations	General Text	↕
Appearance: General Interface	General Text	↕
Appearance: Binder	General Text	↕
Appearance: Composition Mode	General Text	↕
Appearance: Corkboard	General Text	↕
Appearance: Full Screen	General Text	↕
Appearance: Index Cards	General Text	↕
Appearance: Inspector & Notes	General Text	↕
Appearance: Main Editor	General Text	↕
Appearance: Outliner	General Text	↕

+ —

**Figure C.9** A project’s auto-complete list can greatly aid keying in frequently used phrases.

You’ll find an excerpt of some of the auto-completions that were used in the project that drafted this user manual—specifically the names of the various “Behaviors” and “Appearance” Setting tabs ([Figure C.9](#)). As you might expect, having these around saved me a good amount of time!

#### See Also...

- Custom Auto-completion ([subsection 20.2.2](#)): details on how to trigger completions and add new ones on the fly, while writing.
- Scriptwriting Auto-Completion ([subsection 20.2.4](#)): describes the auto-completion behaviour when making use of the scriptwriting features.

### C.6.1 Auto-Completion Scope

Scriptwriting has a concept of scope for elements that are used to format the text. We will often want certain words, like the name of a character’s favourite pub, to be completed while typing into a “Scene Heading” element, but not while we’re typing in the character’s name. Scope helps the software distinguish between these two typing contexts. By and large you will not have to bother with setting anything up here. As you write, Scrivener learns about your script and becomes better at making contextually appropriate suggestions.

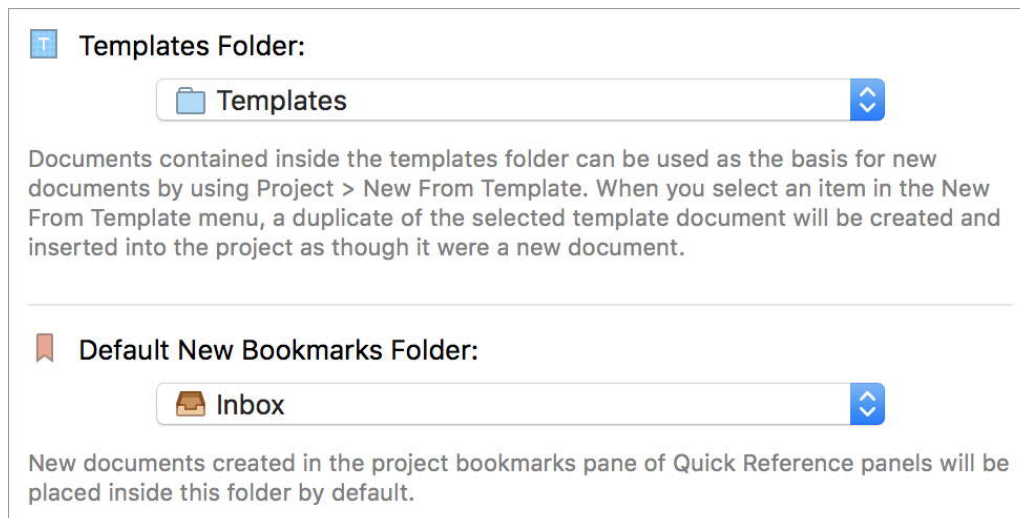
If you want to make changes to the scope of a completion, so that it is present in different, or even *all*, element types, use the “Scope” column to change the context within which it should be used. There are two special settings available:

- *General*: The default when adding your own to the list by hand, and used by non-scripting documents as well. Those documents set to use scriptwriting will ignore entries of this scope (excepting text set to the special “General” or “General (Centered)” elements).
- *All (Text & Scripts)*: Similar to “General”, only these entries will be available everywhere, even in scripting elements that maintain their own lists.

However, if a script element has been configured to not use the project auto-complete list in its script settings, then it will ignore the entry, no matter what scope settings you use.

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## C.7 Special Folders



**Figure C.10** Configure which folders in your project should be used for templates and new bookmarks.

Scrivener has a couple of features that make use of a designated folder in your binder:

**Templates Folder** The folders, files and other items you place into this folder will be provided project-wide as boilerplates for creating new files throughout the binder. A common example of this feature is the “Character Sketch” file, made available in the built-in “Novel” template. The folder and its contents are something you’ll need to create in the binder itself, but

here is where you will designate that folder for being used by this feature. If Scrivener finds a folder in your binder called “Templates”, then it will provide it as an option at the top of the menu for convenient access. Read more about setup ([section 7.5.1](#)).

Use the “No Templates Folder” selection at the top of the menu to disable the feature.

**Default New Bookmarks Folder** By default, when you click the + in the footer of the Quick Reference bookmark sidebar ([subsection 10.3.3](#)), you will be asked where the new file you are creating should be placed. If you would instead prefer all new project bookmarks be created into a central folder, you can designate a location in your binder for this.

Use the “Ask Every Time” selection at the top of the menu to disable the feature.

#### See Also...

- Document Templates ([section 7.5](#)): everything you need to know about how they work, how to set them up and make use of them in your projects.
- Project and Document Bookmarks ([section 10.3](#)): read more on the topic of using project bookmarks in general.

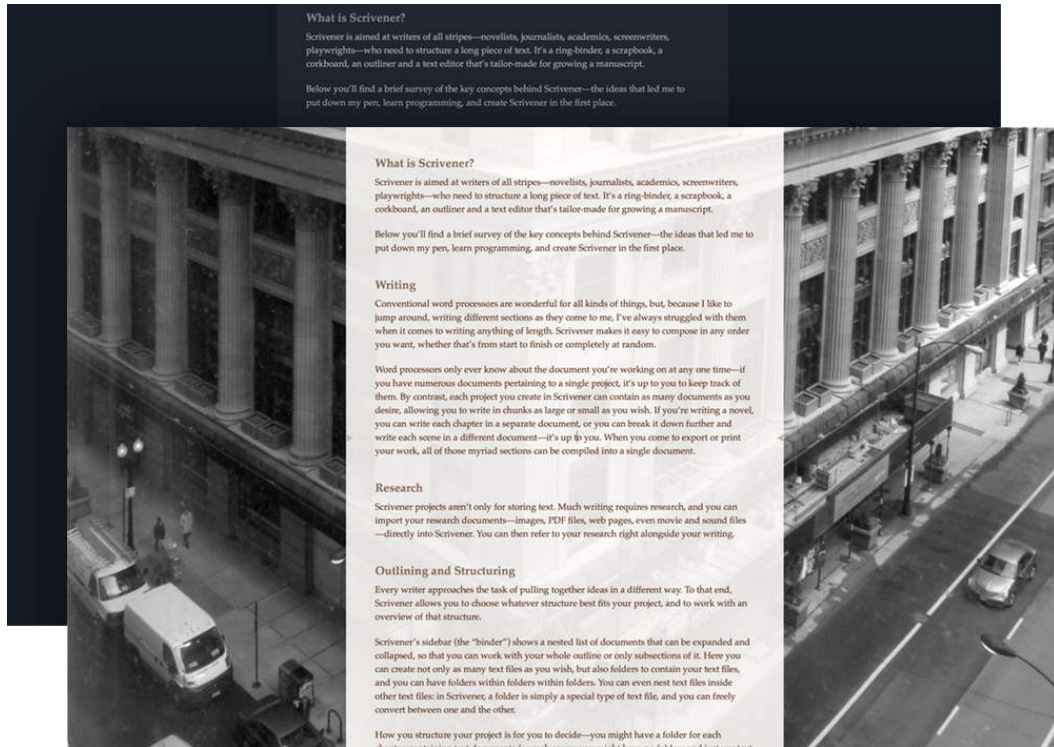
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## C.8 Background Images

Background graphics should be ideally sized to be no larger than the largest screen that you intend to be using. Images must be stored in memory while the project is open, so very large files can bog down the software and reduce stability.

**Composition Mode Backdrop** Choose a background image for your composition environment, rather than the plain background colour. The image will be stretched to fit the screen as necessary, without distorting its shape. This feature is not compatible with Page View mode.

- **No backdrop:** will use a solid colour as specified in the Appearance: Composition Mode settings pane ([Table B.1](#)).
- **Choose from disk:** click the **Choose...** button to select an image from your computer. This will import the image into your project settings, leaving the original free to be moved or renamed.
- **Use image from project:** a list of image resources found within the project will be listed in this dropdown.



**Figure C.11** Default Composition Mode settings (behind) vs settings with a backdrop image.

To remove the backdrop image, select the **No backdrop** setting and click the **OK** button.

**Freeform Corkboard Mode Background** For better performance, use smaller, tiling textures rather than large images. If you intend to use a graphic that is meant to be a structure to lay out your cards upon, you should leave a small amount of padding above the functional part of the image, as the image will start a bit above the viewable area of the corkboard. The image will still tile, so you may also want to ensure there is enough padding to the bottom and right of the functional area to push the tiling effect out of view.

- **Use default background:** defers to the default setting in the Appearance: Corkboard: Colors settings pane ([section B.5.4](#)), which can either be a solid colour or a texture image.
- **Choose from disk:** click the **Choose...** button to select an image from your computer. This will import the image into your project settings, leaving the original free to be moved or renamed.

## C.9 Backup

In this pane you can override the global application backup settings for this project. This panel will only be visible if the automatic backup system has been enabled, in the global Backup settings pane ([section B.9](#)).

**Exclude from automatic backups** When enabled, this project will not be backed up automatically under any circumstances. It can still be backed up manually using the menu commands found within the **File ▶ Back Up ▶** submenu; take care to do so periodically, or have another backup routine in place to keep the contents of this project protected. This option can be useful for very large projects take a long time to back up.

**Use custom backup folder for this project** This can be useful for cases where you want to keep the backups for this project separate from your other projects. If you're working in a secured environment, you could choose an encrypted disk as the backup location. Once enabled, click the **Choose...** button to select an alternate folder for backing up this project to.

The **Open backup folder...** button will reveal this project's backup folder in the Finder.

Click the **Open Backup Settings...** button at the bottom of this pane to load global settings.

# **Scrivener's Compile Formats**

**D**



This appendix will document the built-in compile formats made available in the Scrivener installation, as well as those formats that have been supplied within a few of its project templates exclusively. We hope that by and large the use of these formats is intuitive, but if you wish to modify them or better understand how they work, this section will provide information on their use.

Given that not every format is available to every type of file you can export with the compiler, the list has been broken up by rough category of file type.

## D.1 Default

Meant as a very simple format, its layouts will pass through editor formatting and “glue together” the pieces in your draft folder with little alteration or complexity.

- Folders will still generate page breaks by default, and it comes with a few layout choices for adding additional headings as need be.
- The current page number will be added centre-aligned to the page footer. No other headers or footers will be applied.

This is a good starting point for your own formats, or as a basic way to export projects that do not require any special compilation options. It’s also a good option if you’d rather defer formatting for work in another word processor or desktop publishing program.

## D.2 Word processing and Web

These formats pertain to the print, PDF, RTF, RTFD, DOC, DOCX, ODT and HTML types.

### D.2.1 Enumerated Outline

If you need a basic outline of topics (taken from the binder titles) alone in an indented list, this format is a good starting point. Unlike most formats, it will not export any text, only the titles of documents. The four section layouts that come with this format provide different spacing and numbering schemes for your outline. You can use any mix of styles for different types of documents in your project.

To create your own numbering schemes, duplicate the format and use one of the existing Section Layouts as a starting point. The placeholders used to generate numbering is set in the “Title Options” tab ([subsection 24.2.4](#)).

The amount of indent applied per level can be adjusted with the **Add indent per outline level** setting, in the Transformations format option pane.

## D.2.2 Full Indented Outline

Presents an indented, easy to read outline that includes titles and synopses for all binder levels. The provided layouts provide a choice between alphanumeric numbering, hierarchical or no numbering at all. Refer to “Enumerated Outline” in the previous section for tips on adjusting the indent and numbering styles.

## D.2.3 Manuscript (Courier)

Formats your book using standard Courier 12pt type and a number of common conventions such as scene separators as hash marks, double-spacing, underlined emphasis (instead of italic), page numbers, standard page headers and so forth. It has broad set of section layouts capable of handling a book with parts, chapters, scenes and titled sections. It is thus equipped to work with all of our built-in book generating project templates, fiction and non-fiction alike.

### Common Alterations

#### Empty lines instead of hash mark

By default, the stock compile formats considers empty lines that you create in the editor to signify minor breaks in the text, such as scene transitions or changes in topic. Some formats, such as submission manuscripts, require a more clear signal of such a break than a mere empty line, and commonly use a single hash mark (#) to do so. If you desire empty lines for such breaks instead, then use the following steps to change how this works:

1. Open **File ▶ Compile...** and double-click on the compile Format you want to alter, such as Manuscript (Courier), in the left-most sidebar to edit it.
2. Select the Separators pane ([section 24.4](#)) in the left sidebar of the compile Format Designer window.
3. Examine each of the Layouts in the list, and clear the text field for any that have a hash or other symbol in **Blank line separator** field.  
*Optional:* also set the **Separator between sections** dropdown to “Empty line”, from “Custom”.
4. Give the format a better name at the top, and consider saving this to “My Formats” so you can make use of it in other projects in the future.
5. Click the **Save** button to confirm your changes.

#### Italic emphasis instead of underscoring

If you require emphasis to be in italic instead of underscoring, edit the Format (as described previously in step 1) and disable the **Convert italics to underlines** setting, in the Transformations compile format pane ([section 24.13](#)).

### D.2.4 Manuscript (Times)

Functionally very similar to the Courier manuscript format, only using Times New Roman, another commonly required typeface for submission manuscript. Scene separators remain hash marks, double-spacing, page headers and so forth. Italics will be rendered as italic text rather than underscored. It provides the same array of layouts as the Courier format.

The separator style of using hash marks can be altered using the same technique described previously, for the Courier variant.

### D.2.5 Modern

Providing a fresh look, using the respectable Avenir Book typeface, coupled with Helvetica Neue Bold heading and Light subheadings, this layout is designed printing your own copies or generating PDFs for proofing. It includes a full complement of layout designs, working with all of our book generating project templates.

#### Common Alterations

Empty lines instead of symbol

Refer to the notes for the Courier (Manuscript) format ([section D.2.3](#)).

### D.2.6 Outline Document

This layout is designed for printing full outline information (title and synopsis), but in a standard document layout rather than an indented outline format. It also has several layouts to choose from that only export the title, which could be useful for some projects where larger categorical groupings like parts and chapters may not have any specific synopses of note and just need to insert a sectional break. The page footer contains the title of the work, author's name, date and page number, separated from the page with a dividing line.

### D.2.7 Paperback (6" x 9")

Functionally similar to the previous, this Format is optimised to work with standard paperback sizes in the U.S.<sup>1</sup>

#### Common Alterations

Paragraph spacing instead of indents

Using empty lines to signify paragraph breaks, instead of indents, is a simple adjustment to make. This checklist will also demonstrate how styles can be used

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<sup>1</sup> Or should we say, "optimized".

within a compile format, a technique that will be useful if you require fully styled output in your desktop publishing or word processing workflow:

1. Open **File ▶ Compile...** and double-click on the compile Format you want to alter, such as Paperback (6" × 9"), in the left-most sidebar to edit it.
2. Select the Styles pane ([section 24.5](#)) in the compile Format Designer window's left sidebar, and then select the "Body" style within that pane.
3. Using the standard indent and tab stop ruler ([subsection 15.7.1](#)), drag the first-line indent marker all the way to the left.
4. Click on the line-height dropdown button, and select "Other..." at the bottom of the menu.
5. Set **Paragraph spacing after** to the desired amount, such as 6pts, and click **OK**.

With your desired formatting now declared in one central location, you need only apply that style to all of the cases where paragraph text would be used.

6. Click on the Section Layouts pane in the left sidebar. For every Layout that has a checkmark in the **Text** column:
  - a) Click into the sample text.
  - b) Use the styles dropdown on the far left to select the "Body" style you've prepared. You should see the desired formatting appear.

*Optional:* you may want to set the various headings in the other Layouts to styles as well, now that you are here and know how to do it.<sup>2</sup>

7. Give the format a better name at the top, and consider saving this to "My Formats" so you can make use of it in other projects in the future.
8. Click the **Save** button to confirm your changes.

### D.2.8 Paperback (5.06" x 7.81")

A format designed to produce a typographically pleasing layout that could be taken into a word processor or desktop publishing program for self-publication with little effort. As with the other book generating formats, it is designed to provide a full spread of layouts to accommodate many different book styles and structural setups.

---

<sup>2</sup> By using logical "Heading 1", "Heading 2" and so forth styles your document will have an outline which some software may use for navigation aids, as well as facilitating the construction of a dynamic table of contents.

## D.2.9 Proof Copy

A useful preset for internal proofing. It will reformat your script to double-spacing so you can easily take notes, and prints a disclaimer after each section heading as well as in the header, making it easy to send out “Not for distribution” copies to your proofing team.

### Common Alterations

Empty lines instead of hashes

Refer to the notes for the Courier (Manuscript) format ([section D.2.3](#)).

## D.2.10 Script or Screenplay

This format is also available to the scriptwriting formats, and is documented there ([subsection D.4.1](#)).

## D.2.11 Vellum Export

Available only to the DOCX file type, this Format is designed to convey your work to the [Vellum book creation tool](#), for macOS.

It is best used with styled text ([chapter 17](#)), which Vellum depends heavily upon to correctly format your work. For the most part, you may use Scrivener’s styles intuitively and should find they all work as expected when imported into Vellum. This compile Format will check for the stock style names used by Scrivener and convert them to style names that are expected by Vellum. If you use your own style names, you may want to edit the Format’s list, in the Styles compile format pane ([section 24.5](#)).

Additional style support is provided to (though not defined by default in stock projects):

- Epigraph
- Dedication
- Book Title
- Book Subtitle
- Author

Simply create any style from this list in your project by name, to have the Format pick it up and handle it appropriately.

Since this format produces a document tuned to work with one specific program as a transfer medium, it is not expected for it to look “right” in other programs, or when viewed on its own.

## D.3 Ebook Publishing

Since most ebook readers will handle the majority of the typesetting, choosing a format will be more about getting the basic building blocks together, than exerting total control over the appearance.

### D.3.1 Ebook

A suitable format for ebook design. Electronic books generally require basic and flexible designs in order to be displayed on many devices, from cellular phones to tablet computers to dedicated black & white e-ink displays. This is a good starting point for your own formats when creating ebook formats.

If you have a lot of experience in ebook design, you may find starting from a simpler default to be easier, as this format is built to be used with very little customisation, and thus assumes a lot.

### D.3.2 Ebook Screenplay

When publishing a screenplay intended for display on an ebook device or reader software, you'll want to use this format, which has a stylesheet designed to print the various scripting elements in a format mimicking a screenplay. Since the average reader won't have a screen large enough to truly display a standard screenplay, some of these elements will be estimated, or designed to merely suggest what they would look like on a typical printed page.

### D.3.3 Outline Document

This format is also available to the general word processing and web formats, and is documented there ([subsection D.2.6](#)).

## D.4 Scriptwriting Formats

Available to Print, PDF, the word processing formats, HTML, Final Draft and Fountain file types.

### D.4.1 Script or Screenplay

Most of the formatting will already be done in place, from the scriptwriting settings. The compile format itself is only concerned with page settings and converting “smart” punctuation to “dumb”. Most of your script should be assigned to the stock “Text Section” Layout.

When used with Print or PDF, the compiler will handle the page layout for you. Aside from basic page layout, the compiler will also format dual dialogue and mark dialogue broken by page breaks with “more” and “cont'd” markers. We consider this to be “proofing/reading quality”, in the sense that it may not match

the layout (and thus total page count) of output created by programs designed to create industry standard screenplays.

## D.5 Plain Text and Markdown-Based

These formats are displayed when using the `txt`, MultiMarkdown or Pandoc based types.

### D.5.1 Enumerated Outline

This format is also available to the general word processing and web formats, and is documented there ([subsection D.2.1](#)). The main difference of note to plain-text usage is that the indenting used to indicate hierarchy will be converted to literal whitespace for plain-text. Those using a Markdown-based format should use the “Markdown Outline” format instead.

### D.5.2 Markdown Outline

If you are looking to convert the outline of your project into a Markdown-style indented bullet or enumerated list, then this format will be preferable to the standard “Enumerated Outline” format, in that it has been designed specifically to generate valid Markdown lists. This format also has embedded within it a simple LaTeX design.

You can either assign all of your project’s section types to one of the listing types, or mix and match based on type—though keep in mind that the end result must conform to what Markdown will expect: a strict use of bullets or enumeration per list.

Be aware that when using some methods of filtering or narrowing down the Draft folder, the result may not produce a valid Markdown list, as Scrivener may insert indent whitespacing that in effect causes the list to become a code block. This should be a simple matter to clean up in a text editor.

### D.5.3 Plain Text Manuscript

Designed to serve as a basic plain-text manuscript with emphasised headers, it is a good format if you want a hard long-term backup of your manuscript. Since it is formatted using plain-text conventions, it will last for many decades, if not centuries, to come. It’s also a good format for sharing text through mechanisms that better use plain-text for transmission, such as email, newsletters, readme files and so forth.



### D.5.4 Plain Text Screenplay

For integration with software that can import plain-text formatted screenplays<sup>3</sup>. This format will convert spacing and indents to literal whitespace, as well as pad the text file with enough whitespace to print 1" margins when printed using 12pt Courier. The result will be identical to a formatted screenplay, or what one would get when using a typewriter. Refer to Exporting Scripts ([subsection 23.5.2](#)) if you want to modify the format or make your own.

### D.5.5 Basic MultiMarkdown & Pandoc

The Markdown converters that the compiler integrates with will be doing the bulk of the actual formatting itself, so the compile Formats designed for use with them will primarily be concerned with establishing the *structure* of your document.

Through the three layouts provided, you can print sections as headings, headings with text or text alone. The heading-based layouts will automatically insert the appropriate number of hashes to match your outline hierarchy with heading structure depth.

It is also convert the default project styles (where applicable) to logical syntax:

- Block quotes will have a > prefixing each paragraph.
- Code blocks will be tab-indented and code spans will have backticks surrounding them.
- Captions, when properly placed adjacent to figures or tables, will be embedded in the syntax.

The stylesheet also includes [CriticMarkup](#) support, if you create and use styles by the names of “Addition”, “Deletion” and “Highlight” in your project. Inline annotations will also export as CriticMarkup comments.

For those wishing to use Pandoc for conversion, a similar Format will be provided called “Basic Pandoc”.

### D.5.6 MMD OpenOffice Document

A simple extension of the Basic format, this variant is available when using MultiMarkdown to OpenOffice (.odt) or Flat XML (.fodt) file types. This format provides indexing capabilities, where you can mark terms in your text to be indexed, or supply hidden indexing keywords from the text editor.

To make use of this format’s capabilities, create two styles in your project:

---

<sup>3</sup> Not to be confused with Fountain, which is a newer format that uses a Markdown style approach to writing screenplays.

- *Index Term*: this Character style should be used to highlight printed words or phrases that should also be present in the index.
- *Index Key*: this Character style is meant to insert invisible indexing keys into the main text.

These styles will only insert the necessary indexing markings into the document, they will not cause an actual index to be generated at the end of your file. Use your word processor to insert an index using the formatting options you require.

### D.5.7 Pandoc Word Document

This variant of the Basic Pandoc format will only be available when using Pandoc to Microsoft Word (.docx). It provides identical features as the “MMD OpenOffice Document” Format, documented above.

## D.6 MultiMarkdown LaTeX

When selecting “MultiMarkdown → LaTeX (.tex)” or “MultiMarkdown → PDF” as the compile file type, the formats listed in this section will become available. With the exception of the Modern (Custom LaTeX) format, the available document classes use designs created by Fletcher Penny, the developer of MultiMarkdown.

### Looking for LaTeX Without the Pain?

These formats can be made use of with very minimal, or even no MultiMarkdown usage at all. With the **Convert rich text to MultiMarkdown** option in the General options area of the compile overview screen ([section 23.4.3](#)). A project that has been composed quite ordinarily, using Scrivener’s rich text features, could take advantage of the high quality typesetting that this workflow affords.

The LaTeX formats have a few common features available to them:

- In addition to the basic Section Layouts the “Basic MultiMarkdown” Format uses, the LaTeX-oriented formats include the following:
  - *Text Section with Break*: using a method suitable for each format that supports this layout, a scene or section break of some sort will be inserted between binder items that have been assigned to this layout.
  - *Unnumbered Chapter*: the alternative syntax for a `\chapter*` command will be used, leaving the heading unnumbered and omitted from the table of contents (where applicable).

- *Unnumbered Section*: as above, only using the `\section*` command.
- Stylesheet support is expanded to include additional optional features. To take advantage of these styles, you will need to create them in your project (copying the name and type of style):
  - *Index Key* (character style): use this style to mark text as being an index key. For example if “word” were marked with such a style, then it would be compiled as `\index{word}`.
  - *Index Term* (character style): similarly, this leaves the marked word visible in the output, for those cases where the key and the phrase are the same: `word \index{word}`.<sup>4</sup>
  - *Raw LaTeX* (character style): use this to mark out any ranges of text in your document that should be treated as raw LaTeX syntax, as MultiMarkdown will otherwise encode the special punctuation so that it prints as visible text in the output.
  - *Attribution* (paragraph style): with the memoir-based formats (which include all but the “Book (Tufte)” format), the `\sourceatright` command will be used on the marked text.

### Import Extended LaTeX Styles from the Extras Pack

If you would like to add the extended LaTeX and MultiMarkdown styles, used by these compile formats, to your project, you will find an example project containing them in the Extras Pack ([Appendix G](#)).

Using “9-extended\_latex\_stylesheet.scriv” as a source project, following the instructions provided in Copying Stylesheets Between Projects ([section 17.5](#)). Further tips and instructions can be found within that project itself.

## D.6.1 Article (Memoir)

Uses a layout of the expansive [Memoir LaTeX document class](#) that has been tuned to mimic how the stock `article` class works. The benefit of using this class is the wealth of customisation options available to Memoir in general.

The compile format adds a metadata setting for “Base Header Level” to 2, which means the top level heading will be considered a chapter rather than a part. Chapters will be formatted as major section headings rather than using page breaks and special formatting. If you would prefer a different top level heading, adjust this setting in the Metadata compile format pane ([section 24.11](#)).

---

<sup>4</sup> This style cannot be used in conjunction with full RTF to MultiMarkdown conversion.

## D.6.2 Book (Memoir)

A fairly stock implementation of the Memoir book class, which is generally useful for non-fiction as well. This is a great starting point if you wish to build your own design from scratch (in fact this user manual you are reading made its humble beginnings using this boilerplate).

## D.6.3 Book (Tufte)

A document class with a design inspired by the [books of Edward Tufte](#). This format supplies a few additional optional styles that you can make use of by adding them to your project:

- *Full Width Text* (paragraph style): This will typeset the marked paragraphs full-width, into the right margin area, using the `fullwidth` environment.
- *Margin Note* (character style): Places an unnumbered margin note alongside the paragraph the marked text is within, much like a footnote, but without the cross-reference markings.

Images will be placed in the main text block, and should be no wider than 310 points. If you wish to make use of this system’s margin figures or full-width figures, you would need to create your own styles for doing so.

Section breaks will use the `\newthought` command, supplied by this package. This has the effect of adding an empty line of space between sections, suppressing the indent on the first paragraph of the next section, and setting the first three words to all-capitals. If you would like to adjust how many words are capitalised, create a duplicate of this format, and edit the regular expression in its Replacements compile format pane ([section 24.15](#)). For example, to select the first four words (the number “3” is used, because the fourth word is selected afterward, without the space following that word):

```
^@@((?:\S+\s+){3}\S+)
```

It should be noted that at the time of this writing, this class cannot be typeset using the XeLaTeX engine.

## D.6.4 Manuscript (Courier)

Using a simple design put together by Fletcher Penney, this will typeset your document using a traditional submission manuscript format: 12pt Courier will be used for all text, with 1” margins and double-spaced lines. There are a few peculiarities of this format to be aware of:

- This format does not handle parts, and so in most cases you should set the Base Header Level to “2”, in your project’s compile metadata settings ([section 23.4.2](#)).

- Bold text has no treatment, you should use simple emphasis alone (which will be underscored in the output).
- Chapter breaks will be untitled, and section breaks will simply insert a “#” between scenes.
- Other non-fiction oriented commands, such as footnotes, tables and so forth, should not be expected to work.

### D.6.5 Modern (Custom LaTeX)

Unlike the other formats, this one has been designed by Literature & Latte, based upon its “Modern” compile format for RTF and other traditional printing methods. That aside, it is a modified version of the Memoir system in article format. All of the settings for it are stored directly within the compile format itself. You can easily modify how it works from the LaTeX Options compile format pane ([section 24.12](#)).

#### **For Best Results, use XeLaTeX**

This design makes use of system fonts, and as such it will look much nicer when typeset using the XeLaTeX engine, rather than pdf<sub>l</sub>atex. Since Scrivener uses the latter for its direct-to-PDF option, it has been set up to handle non-system fonts as a fallback. It will also use a standard three-asterisk section break instead of a Unicode glyph, in this fallback mode.

# Stock Window Layouts

FE

This section will document what each of the built-in layouts are meant to provide, and the mechanics of how they are set up. For more information on how these work in general (and what they are as a tool), refer to The Built-In Layouts (subsection 12.3.6).

## E.1 Default

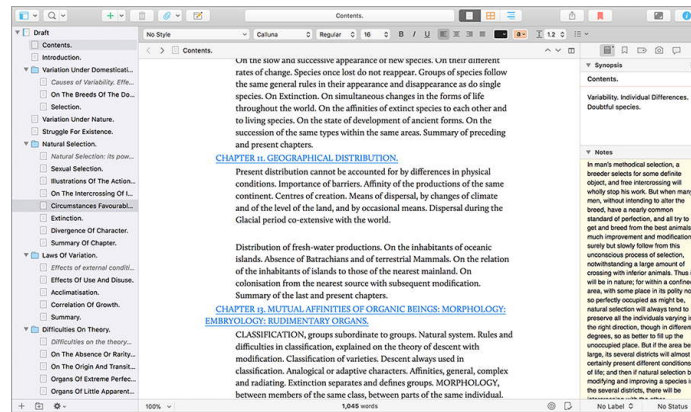


Figure E.1 The “Default” built-in layout.

The first and most important layout to be aware of is the one that gets things back to ground zero. The “Default” layout is designed restore a project window to a basic look, removing the non-active split view, closing ALL copyholders and opening the inspector and binder. It will also clear those navigation settings that modify how the project window behaves when you click on things—in the exact same fashion as using the **Navigate ▶ Clear All Navigation Options** menu command (section 12.5). (That command makes for a good alternative to “Default”, if you’d rather leave the layout of the window alone but get the default behaviours back.)

## E.2 Three-Pane (Outline)

Three-pane browsers are a popular way of navigating through large amounts of information. They typically feature a sidebar (much like the binder) for selecting folders, then display the contents of that folder in a second view, and finally clicking on things inside of that view will automatically load the contents of what you click on into the third pane. This and the following layout will convert a few key aspects of how Scrivener works, to more closely emulate a three-pane tool.

Here are the settings it applies:

- **Navigate ▶ Binder Selection Affects ▶ Both Editors**: by itself, will cause whatever you click on in the binder to load into both splits at once. This behaviour is however slightly modified by the next option.



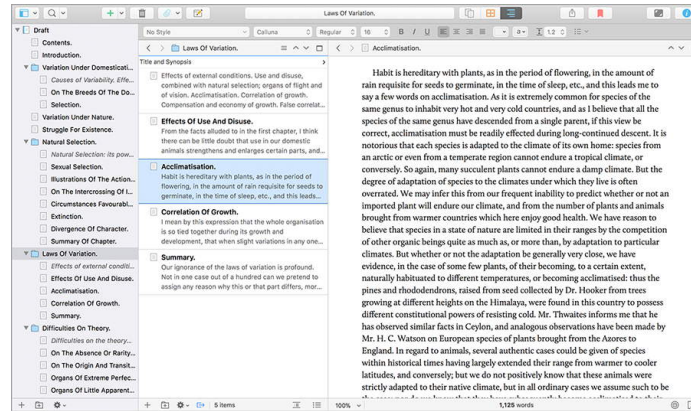


Figure E.2 The “Three-Pane (Outline)” built-in layout.

- Within that same menu, the **Open Non-Group Items in Other** option has been enabled. This redirects non-group items you click on in the binder over to the right split no matter what, and such items will not load in the left editor. Details on how this feature works are described in Making Splits Load by Type ([subsection 12.2.4](#)).
  - **Navigate ▶ Outliner Selection Affects ▶ Other Editor**: as indicated by the highlighted button in the outliner footer bar, any selection you make in the outliner will automatically load in the other split.
- All three of these options together greatly modify how Scrivener typically works, going from a flexible two-pane design to something more like an email browser or notebook program.
- Visually, the outliner will be using a fixed row height ([subsection 8.3.8](#)), which keeps long synopses from dominating the view, and the column settings for it will be altered to only show “Title and Synopsis”.
  - The right split, meant to focus on content, will switch to Scrivenings view mode.

## E.3 Three-Pane (Corkboard)

This layout is functionally identical to the “Three-Pane (Outliner)”, save for using a stylised corkboard view for primary navigation in the left split, rather than an outliner. If you prefer the additional visual display of metadata that the corkboard affords you, this can make a good alternative. It temporarily changes the following aspects of the corkboard:

- **View ▶ Corkboard Options ▶ Cards Across** will be set to “1”.
- The **Size to fit editor** setting will be enabled, from within the Corkboard Options ([subsection 8.2.6](#)) panel.

- The **Spacing**, from that same panel, will be adjusted to a small amount (though it may in fact expand if you were using less spacing before).

## E.4 Editor Only

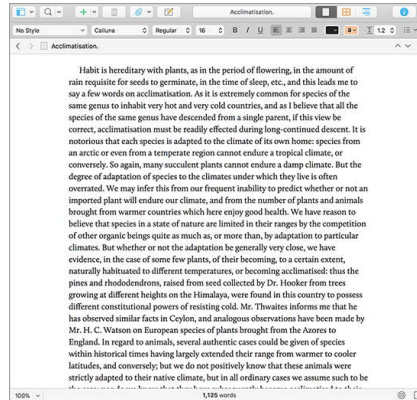


Figure E.3 The “Editor Only” built-in layout.

Does what it says on the tin. This very simple layout simply removes both sidebars, closes the split view and any copyholders. Which split it chooses will depend on what you are currently working with. It will favour the split that is showing a text editor or Scrivenings session. If both (or neither) splits match that description, then the active split will be used. Lastly it will set the group view mode to Scrivenings. Thus if you have a split interface with two corkboards, the active corkboard will become the editor view you focus on and its view will be switched to Scrivenings so you can work with the text. The view will be scrolled to the first selected card or outliner row from the previous view.

If you would prefer an even cleaner layout, with no ruler, format bar or header and footer bars in the editor, you’ll find a custom layout called “Editor Only (Clean)” in the Extras Pack ([Appendix G](#)).<sup>1</sup>

## E.5 Corkboard Only

Much like the “Editor Only” layout, but aiming to provide a clean view for focusing on structure, rather than content. If relevant, when choosing which split to focus on, the layout will select the split with a corkboard. It will otherwise use the active split, changing the view mode to Corkboard if necessary. If you were editing a file then the layout will select the *parent* group, scrolling to and

<sup>1</sup> If you need instructions for installing a layout, refer to Managing Layouts ([subsection 12.3.5](#)).

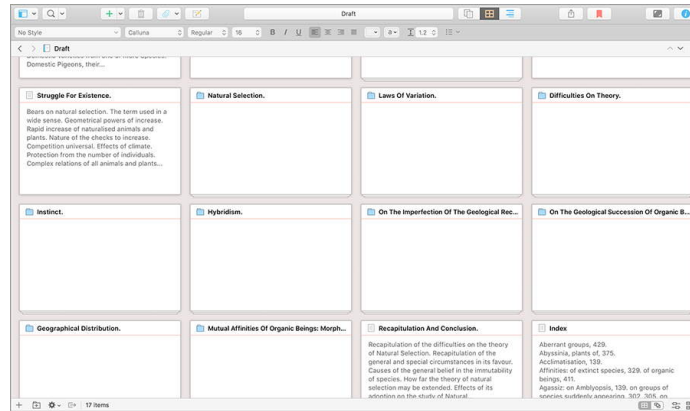


Figure E.4 The “Corkboard Only” built-in layout.

selecting the card for the item you had been editing.<sup>2</sup>

If you would prefer an even cleaner corkboard with no toolbars, you’ll find a custom layout called “Corkboard Only (Clean)” in the Extras Pack ([Appendix G](#)).

## E.6 Centered Outline

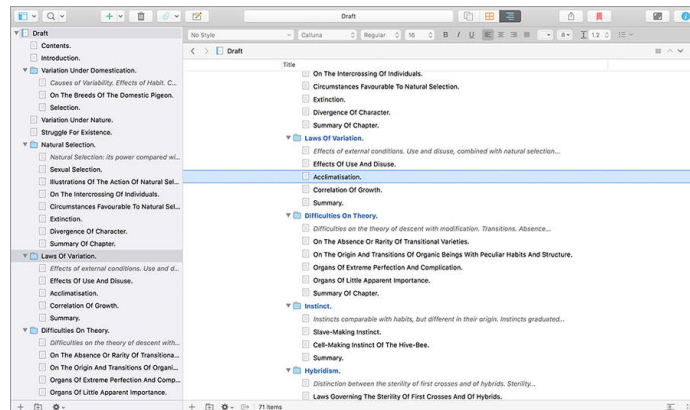


Figure E.5 The “Centered Outline” built-in layout.

The main purpose of this layout is to quickly and simply display a very clean outline view with only the Title (and optionally Synopsis) column visible and the **View ▶ Outliner Options ▶ Center Content** menu toggle enabled. The editor space will be cleaned up, closing splits if necessary and removing any copyholders.

As with the “Corkboard Only” layout, the split showing an outliner will be preferred, otherwise using the active split, and the parent of the currently edited

<sup>2</sup> If you’re curious on how to do that yourself from time to time, the **Navigate ▶ Go To ▶ Enclosing Group** menu command does the same thing, although in that case it will preserve the editor’s current group view mode.

text document will be navigated to if necessary. Unlike that layout, the binder and inspector visibility will be left alone.

## E.7 Dual Navigation

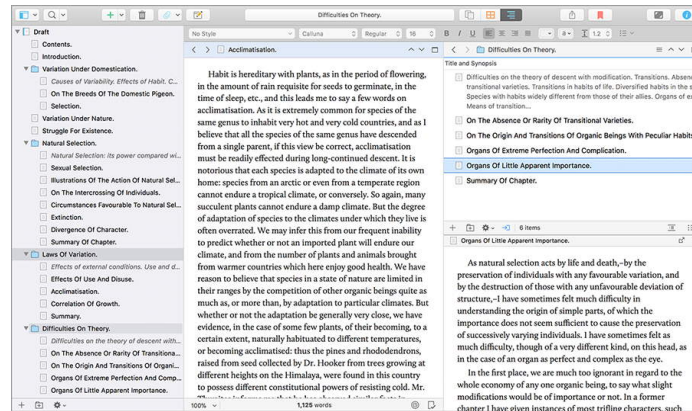


Figure E.6 The “Dual Navigation” built-in layout

If you’ve ever found yourself wishing that you could have a kind of second binder, so that you could browse and edit more than one file at once, this layout may do the trick. You can think of this layout as roughly dividing the project window down the middle into two separate workflows:

- On the left side, the binder and the left split will be bound together exclusively. You can use it for text editing, outlines, viewing PDFs or whatever you need.
- On the right side things are a little more interesting. This side is isolated from the binder and left editor, making it a more static place to work with multiple items in a sort of “mini-binder” approach, where what you click on in the top editor will be automatically loaded in its copyholder below.

If you want to change the group you are browsing in the right side of the project window, you have every single means of navigation at your disposal save for clicking on things in the binder:

- **Option-Click** on items in the binder.
- Drag and drop from the binder to the right editor’s header bar.
- Use the **Navigate ▶ Go To ▶** submenu.
- From the left editor, when using a group view, **Navigate ▶ Open ▶ in Right Editor** (⇧⌘O).
- Quick Search.

- And of course the history back/forward and next/previous item buttons in the editor's header bar.

Here is a list of settings this layout applies, should you wish to tweak how it works or create your own similar layout:

- **Navigate ▶ Binder Selection Affects ▶ Left Editor Only**: this keeps the binder focused on the left side of the project window.
- In the right split, **Navigate ▶ Outliner Selection Affects ▶ Copyholder** has been set, as indicated by the highlighted button in the outliner footer bar.
- The group view for the right side will switch to outline mode.
- The layout will try to use whatever content you were working on in the editor(s) prior to using it, but if it cannot find a combination it likes, it will just load the entire Draft folder into the right-hand browser split and the first item with text content that it finds in the Draft into the left split. If you want to get back to what you were doing before the application of this layout, you can use the history buttons in each editor header bar.

## E.8 Refining A Built-In Layout

You may very well find that you like the basic idea of one of our built-in layouts, but would like to make adjustments to how it works. Although you cannot modify the built-in layouts, for the most part this can be done simply by creating your own layout after making the desired modifications to the project window, as described earlier in this section.



Although they work similarly, built-in layouts are not the same as the layouts you create, and they have some characteristics you won't be able to replicate:

- The “Dual Navigation” layout opens a copyholder panel below the outliner in the right-hand split. Layouts cannot open copyholder panels. However the setting itself that causes selections to auto-load in the copyholder will save, so as soon as you open a copyholder it will start working.
- Built-in layouts can *temporarily* override metadata settings like which columns are showing in the outliner or how many cards across the cork-board displays. When you return to “Default”, you will find your original settings are intact. The layouts you create on the other hand can either only permanently change those settings or disregard them entirely.
- The built-in layouts only make selective changes to settings, rather being a full snapshot of all view settings, navigation options and optionally metadata display options. For instance, if you prefer not to use the footer bar in your editors and have it switched off with the **View ▶ Editor Layout ▶ Hide Footer View** menu command, built-in layouts will not change that setting. A custom layout absolutely will.

- Some of the built-in snapshots are “aware” of what you’re working with in the project window and optimise their behaviour based on that. For example the “Corkboard Only” layout will select the split using a corkboard view even if a text editing split is currently active. Your own layouts will more simply force the saved view mode change upon the current editor(s).

## E.9 Hiding the Built-In Layouts

Once you’ve established a number of your own layouts, you may want to hide these starter layouts to clean up the menus:

1. Use the **Window ▸ Layouts ▸ Manage Layouts...** menu command (⌘) to bring up the layout management window.
2. Click the  button and select the “Hide Built-In Layouts in Menus” command.

You can always bring them back with the “Show Built-In Layouts in Menus” command.

| **What's New**

**F**



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If you are currently a Scrivener 2 user and are looking into whether you'd like to upgrade, this is the guide you want to read. We will discuss the major changes that have been made, and when necessary, cross-reference them to more detailed documentation elsewhere in this manual. Keep in mind we offer a free 30-day

demo. It is safe to run this demo in parallel with Scrivener 2. You can play with the new version and learn it while continuing to work without interruption.

Scrivener 3 is a significant release of the software, one that has been in the making for nearly four years. Core aspects of the software have been thought through with the intention of streamlining how we work without sacrificing flexibility—indeed we wanted to make Scrivener even more flexible while also striving to make routine tasks easier to accomplish. Above and beyond, we wanted it to feel just like what you’ve become used to. Even though some of the changes have been sweeping (watch out for compile!), we hope you find the new landscape not only improved, but familiar as well.

#### **Can’t Find a Feature from the Old Version?**

If you’re looking for a particular feature by name that appears to have been moved or maybe even removed, searching for its name in this section may help you find it. Menu commands can also be searched for by name, from the Help menu.

## **F.1 Compile Overhauled**

The second version of Scrivener represented a complete overhaul of the compile interface from version one, and we are pleased to present a third iteration of the compile concept to you. Based on years of feedback with the system you’ve grown accustomed to, we’ve designed a replacement which draws heavily upon the strengths of the old system while using it as a skeleton to develop a more intuitive and easy to use “front end”.

Given the scope of changes made to the compile system, it is not possible for your existing projects to be upgraded automatically to the new system. For this reason, if you have projects that depend upon complex compile settings, we encourage you to retain the backed up version that was created for you upon updating, as well as an older copy of Scrivener 2, should you need to reference them. It is possible to import and upgrade your old compile settings and presets ([subsection F.I.6](#)).

If you’d like to read a blog article on this topic, [head on over to our site](#).

### **F.1.1 Separators by Type**

Inserting separators into your document used to be a matter of ticking boxes in the inspector, or trying to shoehorn your outline into a layout that worked with the Separator’s compile option pane. If you wanted an empty line between scenes in a novel you could have Scrivener insert empty lines between text chunks—but then you could only ever cut to a new chunk of text for the purposes of creating a formal scene.

In Scrivener 3 you can still assign separators to broad categories (such as all folders or files), but as well to specific *types* of items. Say you have folders in

your project set up to be chapter breaks—it is then useful to say that all chapter headings ought to have a page break before them. Instead of saying “folders have breaks”, we are now saying only *this* kind of item in the binder has a break—and if we use files for chapters instead, then it naturally inherits that same behaviour without having to go in and change compile settings.

Since a chunk of text can now formally be a “scene” that means other chunks of text can be “not scenes” and thus not have any separation between them, allowing you to outline far deeper than your readers will ever be aware of.

## F.1.2 Front and Back Matter Locking

For one thing there is now a concept of “back matter” to begin with, which will be welcome news to those in need of such. Furthermore we’ve made it so you can lock front and back matter folders to file *types*, meaning whenever you select between ePub, PDF and so forth, specific different groups of front and back matter pages can be automatically applied to your compile settings. Read more about locking settings to file type, in Front & Back Matter ([section 23.4.1](#)).

## F.1.3 Preserve Formatting in Markdown Compile

In the past, the **Format ▶ Preserve Formatting** feature would have been used to generate code spans and code blocks with Markdown-based output. This capability has been removed, as it is now served by styles. Use the “Code Block” and “Code Span” styles provided in the stock set, or if you create your own, set them up in your compile settings using the MultiMarkdown and Pandoc Options ([section 24.14](#)) compile format pane.

The **Treat “Preserve Formatting” as raw markup** option, (used in conjunction with the **Convert rich text to MultiMarkdown** setting both in the compile options for Markdown-based formats ([section 23.4.3](#))), will cause marked text to pass through the compiler untouched. This option will mainly be of interest to those that use the iOS version of Scrivener, with its equivalent capability. If you are only using a Mac or PC to compile, it is usually best to use a dedicated style instead (with the **Treat as raw markup** option enabled for it in the Styles compile format pane).

If one has a lot of Markdown blended into their document, it first might be worthwhile to consider whether the full rich-text conversion system is the right tool for the job. If it is, and you still need lots of Markdown, the secondary option to **Escape special characters** can be disabled. This is a “riskier” setting that may require additional proofing, as accidental usage of Markdown may occur where punctuation is used in ways that match its syntax (for example, an asterisk after a word to mark a casual footnote might confuse a Markdown converter, which uses asterisks to denote emphatic text).

### F.1.4 Print with Footnotes

In the past, if you wanted to print or generate a PDF out of Scrivener with proper end of page footnotes, you either had to compile to another program that could do this form of typesetting, or make use of the “Proofing” option in compile settings. Scrivener now typesets its own footnotes for Print and PDF compiling. If that’s all you were needing a word processor for, that’s hopefully one less tool you need to get work done!

### F.1.5 Markdown to RTF Conversion

In the past, those using basic Markdown for italics and bold in their text could make use of an option in the Transformations compile option pane to convert these to rich text formatting, when using any of Scrivener’s native export formats. This option has been replaced by the **Convert MultiMarkdown to rich text in notes and text** compile option, in the compile overview screen under General Options ([subsection 23.4.3](#)).

Of note, it now treats text and notes as properly formed Markdown, rather than simply extracting asterisk marked phrases from an otherwise rich text based document. If your project is not properly formed, use of this checkbox may produce undesirable results—such as paragraphs all being glued together, since Markdown require a clear line of space between each paragraph.

### F.1.6 Importing Legacy Compile Presets

We recognise that you may have invested a lot of time in your compile settings. Should you choose to upgrade a project that is a work in progress, you will find its compile settings will be reset to default. If you would like to carry over the original settings into a new format, refer to the instructions for importing your settings into a new version 3 format ([subsection 23.2.8](#)). For a more comprehensive guide, we have prepared [a tutorial project](#) that goes over many details that may be of interest to you in transitioning to the new system.

### F.1.7 Post-Processing Scripts

Those advanced users looking to automate what Scrivener does after compiling, or to tweak how it makes use of Pandoc and MultiMarkdown, will be interested to know that you can now have the compiler set to trigger an executable upon conclusion, passing along the finished document as an argument. Those adept in scripting can even write their own extensive workflows to handle the document before finalising it, and having Scrivener produce the finished file in the intended save folder (for example, your LaTeX project can be compiled directly to PDF by having Scrivener invoke latexmk or pdflatex). This capability is available to both plain-text and plain MultiMarkdown compile outputs. Read more about the Processing compile format pane ([section 24.22](#)).

## F.2 Section Types, Page Breaks and As-Is

Any talk of the changes made to compile would not be complete without mentioning section types ([section 7.6](#)), a new way of assigning meaning to the folders and text items in your binder, such as “chapter”, “subsection” or even specific types such as “table” or “figure”. By categorising items using natural terms, and telling the compiler what those things should look like, you can do away with the more abstract notion of formatting by *levels* and icon types.

All of this has made the concept of using individual checkboxes for page breaks and such a bit obsolete. If a thing by its nature involves a page break, such as chapter, then we don’t need a separate checkbox to click on.

- **Page Break Before:** page breaks are now a function of how a type is formatted by the compiler. By and large you should find the default settings and templates provide a useful set of *types* to choose from, with useful settings applied to them. To use the above example, if in the past you’ve used this checkbox for front matter sections, you’ll find most of the compile formats contain a layout specifically designed for front matter which includes a page break.

For those upgrading their projects from 2.x, be aware that items marked with “Page Break Before” will be assigned to a special “Section Start” type, created for upgraded projects alone. This should be considered a transitional type, but it will allow your project to continue functioning roughly as it was before.

- **Compile As-Is:** this checkbox is as well no longer in the inspector or specifically assigned to items. The choice to print a section type “as-is” is something you now make when setting up your project’s compile settings. You might for example want to create types for Tables and Equations, both of which are mapped to compile as-is in the end, but remain distinct for their purpose in the project itself.

Upgraded projects will be scanned for the use of “as-is”, and a special “N/A” section type will be created for projects that made use of the checkbox, with all items that used it assigned to that type and automatically mapped to the special “As-Is” section format in the compiler. Thus they should continue working as they did before.

## F.3 Stylesheets

Ye olde formatting presets have become proper stylesheets. You will find much of the toolset has a similar usage from what you are accustomed to in older versions of Scrivener. The dropdown button is in the same location on the Format Bar, and for the most part you can use them in day to day writing, similarly to how you used presets.

The main difference will be when compiling: styles now operate on the assumption that the formatting you use in the editor is intended to be printed as-is in the output, to the best of the output format's ability.

Styles are, as formatting presets were, strictly optional! If you never had much use for the preset feature in the past then don't feel you have to learn anything about styles going forward. If you're interested in using styles as a pure writing tool, refer to Styles That Do Nothing ([subsection 17.4.4](#)).

For all other questions, head on over to Styles and Stylesheets ([chapter 17](#)) to see what's new.

### F.3.1 Converting Formatting Presets to Styles

Do you have a bunch of Formatting Presets from previous versions of Scrivener that you'd like to convert to styles? We won't do that for you because styles are now project-specific, but it is easy to set up styles from a prepared sample:

1. Using the older version of Scrivener, create a new blank project.
2. For each Formatting Preset, type in the name of it into the editor, then select the text and apply the preset.
3. Quit the older copy of Scrivener and open & upgrade this project in the current version.
4. For each line of text you created to store the formatting of a preset, select the text and create a style from it using the procedures for doing so ([subsection 17.3.2](#)).

Once you have your presets all copied over and working to your expectations as styles in the sample project, you can make this stylesheet the global default in the Editing: Formatting settings pane ([subsection B.3.2](#)), by clicking the **Set Styles Defaults...** button. Existing projects will need to import this style list from another project, with the **Format ▶ Style ▶ Import Styles...** menu command. So long as you keep the sample project around for a bit, it will make a convenient target for importing from.

Updating an older project to use these styles can usually be easily done with the **Edit ▶ Select ▶ Select Similar Formatting** command. The style can now be applied to the bulk selection of text.

### F.3.2 Preserve Formatting is Deprecated

In the past, the "Preserve Formatting" tool was the go-to method for preserving the look of specific pieces of text, when one was otherwise using the compiler to normalise and clean up the formatting of the output. This capability still exists for backwards compatibility, but you should use the new styles feature for this specific purpose, going forward.

A secondary use for this feature, in the past, was to pass through raw markup to HTML-based formats (like ebooks and web pages). This is also now a task that Styles should handle, going forward, and you will find these old options removed from Preserve Formatting. There are still a few odd uses for preserve formatting ([subsection 15.7.6](#)).

## F.4 Project Bookmarks

Project notes are dead, long live project notes! That’s right, the feature formerly known as Project Notes, a core part of Scrivener since its early Mac-only beta days, is no more. The good news is that if you’ve benefitted from using them in the past, then you should find it possible to continue working in a familiar fashion going forward, and in fact you may find yourself using the new features in ways you hadn’t before.

When we took a look at this feature, and what we could do to improve the Project Notes window, it became clear that the whole idea had outgrown itself a little. You couldn’t link to them, export them or even search through them—and making it possible to do these things felt like replicating what already exists: the binder.

At the same time we realised there were a number of features in Scrivener that were all kind of offering the same thing, but in different and disconnected ways. The result of their combination is something we can concisely refer to as a single new feature, Project Bookmarks:

1. Project References in the inspector sidebar.
2. Favorites made it possible to place items in choice positions within any menu that let you pick a binder item from it (such as the “Go To” menu).
3. And of course, Project Notes, both in the inspector sidebar and window, themselves.

The combination of these features can be thought of very simply: if you want to make a particular document globally accessible, either as a reference or for the purpose of taking down notes, then bookmark the item. The Inspector sidebar for bookmarks was expanded to include a built-in editor below the list.

For those that preferred Project Notes in a window, the Quick Reference panel (also new to Windows) now sports a project bookmark sidebar, mimicking all of what the old window could do.



### Reference Links are No Longer Named

In the past you could provide a description to a reference. This field has been left out of the new design, with the only text in the bookmark list being the name of the item being referred to. Thus any descriptions you used in the past will be discarded when upgrading the project, and you should be aware that changing the name of a bookmark will directly rename the item in the binder, not how you refer to it in the list.

A side-effect of this merger meant that what we referred to as *document references* in older versions of Scrivener also now benefit from this expanded inspector pane. Now all of those cross-references between items in the binder are instantly accessible without even going anywhere in the main editors. You can of course still do that too—references are just as powerful as they always have been.

For those upgrading Project Notes, you will be presented with a dialogue box informing you of where these notes have been imported into the binder. All of your old Favourites and References will be automatically upgraded to work with the new system.

- Read more about the new features in Project and Document Bookmarks ([section 10.3](#)).
- If you'd like to read further into the background of this design change, we've posted an [article to our blog on the topic](#).

## F.5 Writing History

Your daily progress, whether it be in going from zero to a goal, or from a bloated work that badly needs trimming down to size, can be tracked using a new tool: Writing History ([subsection 20.1.4](#)). Accessed via the **Project ▶ Writing History...** menu command, it not only does some simple summation and calculation for you, but allows for easy export to csv format, where the raw data can be taken into a spreadsheet.

## F.6 Custom Metadata Overhauled

We've added new types of custom metadata that you can use to enhance your record-keeping. In addition to the trusty old text field, there are now list drop-downs, checkboxes and dedicated date & time fields.

Scrivener's new date field takes natural language dates and converts them into a proper date and timestamp for you. However, it won't do this to existing text that you've stored in a text type field as there are too many different ways of

inputting dates, making such an automated procedure risky. Making this conversion by hand will be slower, but you'll be able to ensure the conversions are accurate as you do them:

1. Create a new date type column alongside your original date column ([subsection C.4.6](#)).
2. Set up an outliner view so that both the original hand-typed date column and the new date column are side-by-side.
3. Using Tab to alternate between fields, copy and paste the date from the text field into the date column. So long as you used a fairly standard or easily parsed date format in the past, you should find our date detection code picks it up and converts it to a proper date in the new field.

## F.7 Snapshot Manager

If you're anything like me, you take a lot of snapshots, and furthermore you ask the software to take a lot of snapshots for you as well. This is great for keeping a track record of your progress safe as it develops over time—but it can mean a lot of clutter builds up, especially in those projects that end up being used for years at a time. Eventually even the most ardent data hoarders might come to admit that a bad revision of something that was written five years ago maybe isn't worth hanging on to.

The **Documents ▸ Snapshots ▸ Snapshot Manager** tool has been added to help keep the clutter at bay, and to find those old odd snippets you lost to edits years ago. You can not only specifically search for text through all snapshots, you can search by date as well, and once you have a search result you can prune the results from the project with one easy click. For example, search for <2y to find all snapshots created over two years ago and delete them all.

Read more about it in The Snapshots Manager ([subsection 15.8.5](#)).

## F.8 Enhanced Outlining

The outliner has always been a place where you can pack a lot of information into the view, and thus an integral component in getting that sense of overview that Scrivener can provide, down to the word counts of individual chunks of text or keyword listings.

We wanted to broaden what the outliner can be used for however, as many people also prefer this kind of device as a creative tool. To that end we've added a few aesthetic options that can be used to present the outline as a more content-focused tool, and as well some settings to have it emulate the iOS style listings, made popular on macOS by Mail and a few other programs.

- Centring Outliner Content ([subsection 8.3.9](#)): much like fixed-width text editing (which is also now a default, rather than text that stretches across

the entire screen), you can trim down your outliner to a basic text column and keep it balanced in the middle of the view, rather than pinned to the left. If you're spending a lot of time developing the outline itself, working in titles and synopses, you might want to take a look at this simple but comfortable adjustment.

- Using a Fixed Row Height ([subsection 8.3.8](#)): the outliner has always expanded the height of each row to match the amount of content you put into it. This content-biased approach means you never miss a word, but it can sometimes be more efficient if every row takes up the same amount of height. Scrolling becomes more predictable and static, and content is easier to parcel out with the eye. If you want to give it a quick look, check out the new built-in “Three Pane (Outline)” layout, in the **Window ▶ Layouts ▶** submenu (or from the new View button on the far left of your application toolbar).
- A bounty of new options have been added for adjusting the look of the outliner. Take a look in the Appearance: Outliner settings pane ([subsection B.5.9](#)).

## F.9 The Devil in the Details

We've gone over most of the major differences between versions 2 and 3, what remains are a few of the smaller changes that are worth making note of. It would not be possible to list every single change in the software, so this list will concentrate on those changes that could impact how you've used version 2 in the past.

**Subdocument counts in binder** If you used the global setting that prints the subdocument counts as a numeral to the right of containers in the binder, you will be interested to know where that feature has been moved to. It is now a project-specific setting, toggled with the **View/Outline/Show Subdocument Counts in Binder** menu command.

**Migrating Your Settings** By default, Scrivener 3 will start you with a clean slate for settings, giving you the default out of the box experience, even if you've used Scrivener in the past. If you would prefer to migrate your settings to the new format, then use the **Manage...** button in the lower left corner of Scrivener 2.x's Setting window to “Save Preferences to File...”. Now switch over to Scrivener 3 and use its own **Manage...** button to “Load Settings from File...”.

Not all Settings will be identical between versions, and Scrivener 3 will have many more Settings than 2, but those that do match between programs will be set, giving you a head start in getting the new version set up the way you like.

**Dragging Links into Documents** One of the simplest methods for creating a link to a document from the text you are currently working on is to drag and drop the document you wish to link to into the text editor. In Scrivener 2, you were required to hold down the **Option** key while doing so. In Scrivener 3 you can just drag and drop the document straight in ([section 10.1](#)). Meanwhile Option-dragging now pastes the *content* of the dragged document into the editor where you drop.

**Dragging Text Out of Documents** While we're on the subject of dragging, you will want to know that dragging selected text out of an editor and into another context (such as the binder or another editor) will now *move* the text, just as it is the default behaviour to move text that has been dragged within an editor. If you would prefer Scrivener worked as it used to and copied text dragged out of the editor, disable the **Delete text dragged to other areas** option, in the Behaviors: Dragging & Dropping settings pane ([subsection B.4.4](#)).

**Editor Header Bar Icon Menu** Since the very beginning, Scrivener has always presented a few useful commands pertaining to the document you are working on, in the header bar icon beside the title of the document you are editing. All of that is still there in Scrivener 3 (and more besides), but you no longer have to click on the icon. Instead you can now right-click *anywhere* in the header bar (other than the history buttons).

As for the icon itself, that is now something you can drag, just like dragging the document itself from the binder; this form of dragging is just as powerful as that. You can move an item to a new location, assign it to a collection, create a hyperlink to it from another text, drag it to a second header bar to load the document twice, and so on. In fact, whenever you see an item icon, try dragging it, chances are it will act as a proxy for the item itself.

**“Go To” Menu in Header Icon Menu** When viewing a Scrivenings session in the past, the “Go To” menu, found when clicking upon the header bar icon menu (which incidentally is now a right-click anywhere in the header bar), you would be given a simplified table of contents for the current session. This was nice, as you could easily jump around from one section to another within the text you were currently working on—but it could also get in the way if you're used to the feature letting you go anywhere at all in the binder.

When in a Scrivenings session, you will note a new button on the right hand side of the header bar ([Figure F.1](#)). Click this to view a concise table of contents for the current Scrivenings session. You can click on entries to flip between them, and elsewhere once you're done. You can also use the arrow keys on your keyboard to move between sections.



**Figure F.1** The new “Navigate to Section” button, first in this series of buttons found on the right side of the header bar.

**Excluding a Project from Backups** If you have updated a project that was excluded from automatic backups, it will go on as excluded. However you should know that the option to toggle this setting has been moved from the File menu into **Project ▸ Project Settings...**, under the Backup tab. While there, you may also note it is now possible to select a custom backup folder on a per project basis.






**Changing Composition Backdrop** If you’ve enjoyed the ability to set a photograph or texture to the background of your full screen writing environment, you’ll want to know that option (along with many other project specific options by the way) has been moved to the **Project/Project Settings...** panel, under “Background Images” in the sidebar. Everything else about the feature should be familiar.

**Project Properties are Compile Settings** Instead of setting up the title of your work, author’s name and so forth in a project setting panel, this is now done directly in the main compile interface, under the “metadata” dog tag icon on the right hand side. For projects that have been upgraded from the 2.x format, you should find the information from Project Properties migrated over to the new location for you.

**Modified Default Revision Colours** If you have projects which are currently using revision markings, you should be aware that the default revision marking colours have been modernised, meaning the new version of Scrivener will not “see” your old markings, for purposes of features that search by or strip out markings. If you require consistency with existing projects, you should visit the Editing: Revisions settings pane ([subsection B.3.3](#)) and adjust the five levels to their previous levels.

You will find two macOS colour file sets in the Extras Pack ([Appendix G](#)). Place these files into your `~/Library/Colors` folder, and now they will be available from the third tab of the standard macOS colour picker tool.

**Modified Default Highlight Colours** The set of default highlight colours that Scrivener makes available in the **Format ▸ Highlight ▸** submenu have been modernised. If you have upgraded a project that made use of highlights in the previous version, you will find that colours do not match the old highlights. This will mainly be of impact if you use the **Edit ▸ Find ▸ Find by Formatting...** tool to locate highlights of a specific colour. If you want to “upgrade” your existing highlights, you could use that same tool to search for the old colours, and simply set the highlight to the new colour (from

that point on you could very easily alternate between    G to find the next old highlight and   H to apply the new colour.

This will also be of concern if you have used the Scrivener colour palette to rename the highlight colours in the past, as documented in Naming Text Highlights ([subsection 18.5.1](#)). The easiest way to address this will be to remove the `~/Library/Colors/Scrivener.clr` file and relaunch Scrivener so that it creates a fresh one with the new colours.

**The Text Editor Uses Fixed Width by Default** In the past, Scrivener’s default text editing mode displayed text the full width of the editor, no matter how wide it was. This meant that if the editor grew very wide, text lines could become unreadably long (and in fact fixed-width editing was set as a default for full screen mode to combat the worst cases of this). Scrivener’s default way of presenting text is now to a fixed width column, one that will respect the relative number of characters that can be seen on a single line, no matter the zoom level—or what some might think of as “margins” (though they have nothing to do with how the document will print or compile). If you do not like this new way of working as a default, you can switch it off in the Appearance: Main Editor settings pane, under **Use fixed width editor** ([subsection B.5.8](#)). You can also adjust the width of the text column in this panel, and whether or not it should be left-aligned or centred within the editor.

**Custom Categories for Project Templates** You can now organise your project templates into custom categories in the new project template chooser. Refer to Custom Categories ([section 5.4.3](#)) for more information.

**Locked Editors Divert Navigation** In the past, when you locked an editor you could freely work in the sidebar without content loading in that editor or the other split. Now, if the interface is split the other editor will receive the navigation request instead. If you would prefer the older behaviour, change the **When focused editor is locked in place** setting in the Behaviors: Navigation settings pane to “Binder selection does nothing”.

**Text Bookmark Feature Removed** The Text Bookmark feature, which allowed one to create markings in the text and then later jump to those markings from a menu, has been removed. The Comments & Footnotes inspector tab is more than sufficient for placing markings in the text, and clicking on these notes in the inspector scrolls the editor to that point in the text.

If you have bookmarks left over in your text from previous versions, you will need to strip them out, to avoid them ending up as comments when compiling with inline annotations included. Alternatively you can convert them to the preferred modern method, using the **Edit ▶ Transformations ▶ Convert Inline Annotations to Inspector Comments** menu command.



**Footnote Numbering Off By Default** In the past, when you compiled your document, all inspector footnotes would be numbered in the order they appeared in the compiled output, and this number would be printed in the upper left-hand corner of each footnote in the inspector. This still happens in the background in Scrivener 3, but the display of the numbers themselves has been disabled as a default. You will need to manually turn it on with the **View ▶ Text Editing ▶ Show Compiled Footnote Numbers in Inspector** menu toggle.

**Sync Folders Will Need to be Updated** If you've been using the **File ▶ Sync ▶ with External Folder...** feature in prior versions of Scrivener, you should be aware that necessary internal changes have made it so that an existing sync folder will need to be rebuilt from scratch with the new version. The best result will be to sync the project one last time to this folder so that it is fully up to date, before upgrading, and then delete the folder and create a new one after you've upgraded the project in the new version of Scrivener.

**External Document Links Will Need Updating** The way in which documents are referred to internally has fundamentally changed in Scrivener 3, and as a result, links pointing to items within projects with the External Links ([subsection 10.1.6](#)) feature will need to be updated by hand. We apologise for the inconvenience, but given how these links are located outside of the original project that has been updated, there is no way for Scrivener to know where the original item went.

**Typewriter Scrolling Now Weaker** It is typical to boast of things growing stronger, but in this case we'd like to mention a feature getting a little weaker. Typewriter scrolling had one flaw with the idea: it wasn't terribly good for editing. If you were scrolling and clicking into places to fix bits of text, the behaviour to snap the typing line into the middle of the screen wasn't worth leaving on, leaving one to awkwardly toggle the option on and off.

So in Scrivener 3 the feature now stops forcing you to one line when you do just that. If you scroll away from the point where you have been writing to fix a typo, the editor will start using *that line* as the scroll point, instead. If you prefer to resume writing in the middle of the screen, hit the **⌘ J** shortcut (or use the **Edit ▶ Find ▶ Jump to Selection** menu command).

Don't like it? No problem, you can get the old way back by disabling the **Typewriter scrolling always jumps to scroll line** setting, in the Editing: Options settings pane.

**Project Settings Unified** In the past, many of a project's settings were scattered throughout different dialogues and menu commands. While most of the visual preferences that pertain to how a project looks are still located in the standard View menu, the rest have all been gathered into a single dialogue,



accessed through **Project ▶ Project Settings...** (Appendix C).<sup>1</sup>, the following features have been folded into this pane:

- Setting the Document Templates folder, previously set with the **Project ▶ Set Selection as Templates Folder** menu command.
- Custom project formatting overrides, found in the old **Project ▶ Text Preferences...** pane.
- The auto-completion list, previously found in the **Project ▶ Auto-Complete List...** menu command.
- Composition mode’s backdrop, which was previously set with the **View ▶ Composition Backtop ▶** submenu.
- Disabling automated project backups, previously toggled with **File ▶ Back Up ▶ Exclude From Automatic Backups**.

**Project and Text Statistics** The “Project Statistics” and “Text Statistics” panes have been combined into a single feature, **Project ▶ Statistics...** (⇧⌘⌘S), with two tabs. The latter now has every feature the former once had exclusively, and vice versa. To get statistics on a single text document, view it in the editor alone and then use the “Selected Documents” tab. You can click on statistics in the footer bar of the editor and get much of the same information provided here.

### Compiled draft statistics may alter

While we’re on the topic, it’s worth mentioning that you might see a difference in your overall compiled draft count. This is most likely going to be a side-effect of your compile settings having been reset to default when the project was upgraded. If you were using options in version 2 that added a significant amount of text (like for example all of your document notes) then upon checking your word count in version 3 that number will have dropped.

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## F.10 Menu Reorganisation

The main menu, from File to Window, has been completely rethought. We’ve also introduced two new major menus, “Navigate” and “Insert”, the former fo-

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<sup>1</sup> It is worth noting that a project’s global metadata, such as the author and title of the work, has been moved into the **File ▶ Compile...** pane, and generally you can now set that universally in the new General: Author Information settings pane.

cusing on project window navigation of all sorts, and the latter now lists all of the various types of things that can be inserted into text, from images to the current date and time. If you make heavy use of the menus in Scrivener, you may notice more than a few things have been moved around, but hopefully you find the changes to be logical and easy to adjust to. As before, the Menus & Keyboard Shortcuts ([Appendix A](#)) appendix provides a complete reference on every menu command.

You can also search for a menu command you recall by name, from the Help menu.

## F.11 Updates to Version 3

We are constantly looking to improve Scrivener. The remainder of this section will document significant changes since its initial 3.0 release in the Autumn of 2017. For a complete list of all modifications and bug fixes, refer to the [release notes page](#) on our website.

### Version 3.3.7

#### Writing tools menu commands moved

With macOS 15.1+, Apple has taken over the menu name, “Writing Tools”, where Scrivener previously provided such tools as linguistic focus, the name generator, web searching and dictionary look-up. The majority of these tools have been relocated to a new menu called **Edit ▶ Reference Tools**. Linguistic Focus has been moved to the **Edit ▶ Spelling and Grammar** submenu.

#### Terminology updated to “Settings”

The user manual and tutorial have been updated to now refer to “Settings” and “System Settings” instead of “Preferences”. Where relevant, they have also been updated to refer to system settings by their new locations. Those using versions of macOS older than 13.0 will still see the word “Preferences” used in most areas of the interface, and some system settings may be located in different tabs than documented.

### Version 3.3.0

#### Title spacing with no Markdown hashes adjusted

When compiling to any of the Markdown-based compile formats, the **Number of hashes** setting, in the Section Layouts: Title Options compile format pane ([subsection 24.2.4](#)) will now no longer force an empty line after the titling elements, increasing flexibility for how this setting can be used. It can now be used to create Markdown syntax that requires adjacent lines (such as definition lists or tables).

For cases where it was being used to generate syntax that *does* require an empty following line, your compile formats will require adjustment. Simply add a carriage return in the **Title Suffix** field to add an additional newline, forcing an empty line between it and the following material generated by the layout.

## Version 3.2.0

### Java removed from installation

Java is no longer embedded in Scrivener itself, meaning if you require enhanced conversion for ODT and DOC formats, you will need to install it separately to your system. If you do not have Java installed, you will most likely notice a drop in document quality and formatting capabilities (such as missing images and footnotes). This change does not impact DOCX, which is now fully supported natively by Scrivener.

### Contacts integration removed

Seamless integration between software has long been an advantage of using a Mac. However in recent years Apple has been taking steps to cast such integration in a negative light, unduly presenting warning messages that would lead one to believe there might be a privacy or security concern with allowing integration. As such, we are removing Contacts integration from Scrivener, meaning you will now need to fill in your author information by hand, via the General: Author Information settings pane. We apologise for the inconvenience.

### Import OPML as text

For those outlining tools that work more like folding text editors, we have added a new option to the Sharing: Import settings pane, **Import outline into main text**, which imports all OPML content into the main editor, rather than as headlines (or binder titles, in Scrivener's terminology).

### Header bar status colours changed

The colours used to indicate header bar status have been changed. "Locked in Place" is now indicated by changing the shade of grey (darker in Light Mode, and lighter in Dark Mode) and adding a small lock icon to the right hand side of the header bar. When splitting the editor, the targeted split will now be accented using your system accent colour (or blue on older operating systems that lack this setting).

### Monochrome toolbar option available

**<macOS 11+>** For those using macOS 11 or greater, the option to use monochrome icons in the toolbar has been added. If you prefer this look, set **Use monochrome toolbars**, in the Appearance: General Interface settings pane ([subsection B.5.1](#)).

## Version 3.1.3

### Matching Text Finder

A tool has been added to the Inspector that will make it easy to find when one document quotes some text found within another document verbatim (up to and including the entirety of the document as a full duplicate). This will primarily be useful in ensuring you haven't accidentally plagiarised any of your sources, but you may find it be generally useful as a tool for finding items which contain common snippets of text. Read more about the Matching Text Finder ([subsection 13.4.4](#)).

## Version 3.1.2

### Copy items between open projects

Binder items can now more easily be filed to other open projects, similarly to how the Scratchpad can do. You will find a new submenu, **Documents ▶ Copy to Project ▶**, which is organised by all open projects. Within each project submenu you can target a specific item to file the selected items from *this* project, into.

As with the “Move To” command, your last target will be remembered, and supplied to a convenience command, **Documents ▶ Copy To “X” Project Again** (⇧⌘⌘C).

### Improved PDF and print

When producing PDFs for self-publication, you may sometimes be required to submit a PDF file that has crop marks applied to it. A new option has been added to the General Options tab of the compile overview screen ([section 23.4.3](#)) that will expand the page slightly so that these marks can be added. They will be used to trim the book back down to size at the printer.

Additionally it may be requested that your cover image have a bleed amount added around it. Cover images should be designed with a bleed built into them, ideally, but you can use any image and Scrivener will scale it appropriately to fit within the larger bleed area around the printed page. You can set the bleed amount in the Cover tab of the compile overview screen ([subsection 23.4.5](#)).

Lastly, for proofing copies you might wish to distribute a much smaller PDF than is necessary for print. New options to reduce the PDF size by compressing and resizing images have been added to the main General Options tab, with the **Reduce file size** settings.

### Find Duplicates

Project search has a new option, **Find Duplicates**, which when enabled will cull the current search result list to only those items that have duplicate data within the scope of the search. Full duplicates can be found by searching for **All**, or specific duplications can be found among **Titles** or any other search criteria. Read more about it in Finding Duplications ([section 11.1.3](#)).

## Shortcuts changed

The shortcut for copying text without any notation has been moved to a transitory command that may appear after you’ve used the “Copy to Project” feature ([section 6.3.4](#)).

**Table F.1** Keyboard shortcuts changed in 3.1.2

Menu Command	Shortcut
Edit ▶ Copy Special ▶ Copy without Comments and Footnotes	Removed
Documents ▶ Copy To X Project Again	⇧⌘⌥ C

## Version 3.1.0

### Support for Mojave Dark Mode

⟨**macOS 10.14+**⟩ We have added full support for macOS 10.14 “Mojave” Dark Mode. The main project window, all subsidiary windows and panels will now be displayed in dark grey when this system setting is enabled. You can also switch to Dark or Light mode regardless of the system setting.

Since Scrivener is a rich text based editor, making the main text editing areas dark proved to be an interesting challenge in balance. One can easily use colours (such as bright yellow highlighted text) that renders the result completely unreadable with light grey text on a dark grey background. Extensive colour filtering has been developed to provide a dark editor look that yet still provides a sense of the original colour treatment.

Lastly, it wouldn’t be Scrivener if you couldn’t change most of the colours. Most of the colour settings in the Appearance settings pane ([section B.5](#)) are now contextual, changing the setting for Dark or Light mode, depending on which you are currently using.

Read more about Dark Mode ([section 4.3](#)).

### Focus mode, for zeroing in on text

Some find it useful to fade out all of the text in the editor, save for a narrow amount around the point where they are writing. With Focus Mode, you can choose between line, sentence and paragraph and have the rest dimmed beyond distraction. Focus can be applied to the main text editors, copyholders, Composition Mode and Quick Reference panels. Read more about Focus Mode ([section 16.4](#)).

### ePub 2 and legacy mobi deprecated

Support for older ePub 2 and Kindle MobiPocket formats will be phased out of Scrivener over a period of time, starting with 3.1. Unless you have customised

compile formats for these file types in the past, you will no longer see these options in the **Compile for** dropdown, at the top of the compile overview screen.

Where projects have at least one custom ebook compile format designed for ePub 2 or legacy Mobi, then the compiler will continue using those settings, and grant access to the legacy export engine. These engines will also be generally available if you have saved a global custom format for these older file types.

For all current and future projects you are encouraged to migrate to the newer formats, which from now on will simply be referred to as “ePub” and “Kindle”, in this documentation and elsewhere. The new methods provide the same easy to use approach the older methods use, while also providing cleaner and more technical access to ebook formatting itself, for those that need it.

### Improved PDF and print

Additional layout features have been added to the compiler, for PDF and Print output:

- *Widows & orphan protection*: cases where one line of text from a paragraph is left all alone on the wrong side of a page break, can now be avoided (and will be by default) when printing or compiling PDFs from Scrivener. This capability is extended to longer multi-paragraph footnotes, which might become split across pages. If for some reason you find this option produces undesirable results, it can be switched off in the Text Layout format pane ([section 24.6](#)), with the **Avoid widows and orphans** setting.
- *Add a cover image*: when compiling to PDF format you can now insert a cover page at the very beginning of the document. This will be done using the same interface that ebook file formats have used for setting up their covers, and indeed will share the same Settings. Refer to Cover Options ([subsection 23.4.5](#)) for further information.
- *Dual Dialogue support for scriptwriting*: when compiling a script to PDF or Print, there is now support for laying out dual dialogue that has been marked using the Preserve Formatting feature ([subsection 19.1.4](#)).
- *Dialogue continuation markers around page breaks*: additionally, dialogue that would extend over a page break will be marked with traditional “MORE” and “CONT’D” markers. Although we do not expect Scrivener to be used to deliver final quality screenplays, these new features should dramatically improve handing out proofing copies to readers, and provide a better feel for how you intend the script to be read.

### Easier access to section layout editing

In the past, if you were setting up your project’s compile settings and spotted one small tweak you’d like to make to one of the Section Layouts (like making the chapter heading a little bigger), you’d have to take note of the name of the

Layout, edit the Format you are using (perhaps even duplicating it to make a new one if it is built-in), located the specific layout by name in a long list of them—well, no more! Now you can simply double-click right on the Layout preview you want to edit and you’ll be taken straight to the Section Layouts editing pane.

We’ve also made it so that when double-clicking on built-in formats in the compile overview sidebar, duplication will be done automatically.

### Shortcuts changed

To standardise Scrivener with what has since become a convention, the **Edit ▶ Add Link...** command will now use the **⌘K** shortcut. The shortcuts for splitting documents required adjustment to make this change happen. Additionally, taking snapshots with a title has been changed, as macOS 10.14 now uses the **⇧⌘5** shortcut for screenshots ([Table F.2](#)).

**Table F.2** Keyboard shortcuts changed in 3.1

Menu Command	Shortcut
<b>Edit ▶ Add Edit Link...</b>	<b>⌘K</b>
<b>Documents ▶ Split ▶ at Selection</b>	<b>⌘⌘K</b>
<b>Documents ▶ Split ▶ with Selection as Title</b>	<b>⇧⌘⌘K</b>
<b>Documents ▶ Snapshots ▶ Take Snapshot with Title</b>	<b>⇧⌘5</b>

### Hide sections of the Draft from ebook table of contents

For those cases where you need to create a “page break” in your ebook without having that section listed in the HTML table of contents, a new option is available to Section Layouts, in the “Settings” tab, **Hide entry in HTML table of contents**. Section Types that make use of this layout will not be listed in the ToC, but will still remain as formal sections, in the ebook’s content list, as well as in the navigation guide use for jumping between chapters and other major divisions.

## Version 3.0.3

### MultiMarkdown 6 Support

Scrivener now fully supports MultiMarkdown version 6, and integrates version 6.2.3 in the application. The most noticeable difference will be the removal of the MMD to RTF compile format, which is no longer supported, and the addition of a native OpenOffice ODT format. No longer will you need to compile to Flat XML and use LibreOffice to make the final conversion.

The other notable difference between MMD 5 and 6 is how the metadata is handled for  $\text{\LaTeX}$  documents. If you have been using your own custom metadata in



your compile Formats, you will likely need to update the metadata keys you use to work with MMD 6. Instead of using a general purpose “LaTeX Input” metadata key to include boilerplate files, there are now dedicated “LaTeX Leader” and “LaTeX Begin” keys. The former is used to establish the initial preamble, the latter to provide any further preamble after the insertion of document-specific metadata keys such as the title and author. Scrivener will of course make use of the new system with all of its built-in  $\LaTeX$  document class selections.

Lastly we have added support for the Tufte (Book) document class for MMD to  $\LaTeX$  and PDF compile formats.

### Default Paragraph Style Removed

The option to automatically apply a paragraph style to text as you write has been removed from the Project Settings: Formatting pane. Scrivener is designed to work around the concept of not styling body text, and rather leaving it flexible to be transformed by the compiler when exporting. Refer to Think Different ([section 17.1](#)) for further rationale on this decision.


### LaTeX Compile Support Improved

For the MultiMarkdown to  $\LaTeX$  compile file type, we have added five new compile formats, to make switching between common document classes simpler. With one click you can go from formatting your work in a screen-friendly “Modern” look, to a formal article design. Further documentation on the formats is provided in MultiMarkdown LaTeX and PDF ([section D.6](#)).

For those looking to print a simple outline of topics, the “Markdown Outline” compile format now has a better default look when used in conjunction with MMD to TeX or PDF.

In addition to this, those looking to use Scrivener as a pure LaTeX editing platform (with no Markdown-based conversion) now have a dedicated project template they can start from, in the Non-Fiction category: “General Non-Fiction (LaTeX)”. This project template is designed to be used for the composition of  $\LaTeX$  directly, but as well it features partial support for generating  $\LaTeX$  syntax from Scrivener’s built-in formatting features.

### Bulk Keyword Management Improved

In the past, managing keyword assignments at a large scale was limited to bulk assignment, by dragging keywords from the Project Keywords pane ([section 10.4.5](#)) onto selected items in the background window. It is now possible to right-click (or use the  button) on selected keywords to assign *or remove* keywords from the selected documents in the background.

### ePub for... Kindle?

In some cases you may find third-party publishing agencies will only accept ePub files. We have added a new option to the general options tab within the compile overview screen ([section 23.4.3](#)) to “optimize for Kindle conversion”. This will include a few tweaks to the underlying HTML, as well as navigation hints that will make the ePub file convert more cleanly to Amazon’s plethora of different formats.

This option should not be used with KDP itself. You should use a standard ePub file for publication with Amazon.

### Create New Compile File Types with Post-Processing

⟨**Direct-sale only**⟩ Scrivener can tap into the command-line capabilities of your system through the use of scripts embedded directly into the compile Format, making it possible to package automated workflows to wider audience who need not know how to set up scripting themselves. In addition, post-processing has been added to the Plain Text compile file type, making it possible to create wholly new file types from scratch and processing them into end formats.

Refer to the Processing compile format pane ([section 24.22](#)) for further instructions, and the Plain Text’s Markup compile format pane ([section 24.10](#)) for tips on creating your own custom file types.

### Vellum Export Support

For those that make use of [Vellum](#) for the final design and production of their books, we have created a compile Format for the DOCX file type. The format has been tuned specifically to produce optimum results when imported into Vellum. More details can be found in the appendix listing of Scrivener’s compile formats ([subsection D.2.II](#)).

### Better Multivolume Support for Front/Back Matter

For those who write more than one volume into a single project, the front/back matter feature has been modified to allow for automatic selection of preliminary and ending material, depending on which volume you currently have selected for compile. This can be combined with the already existing feature to automatically switch between front/back matter sets based on the *type* of file being compiled. Refer to Linking Front/Back Matter to Compile Groups ([section 23.4.I](#)) for tips on setting up your projects to work this way.

## Version 3.0.2

### Inserting Media Time Stamps

It is now possible to insert the current time stamp into the text editor, while running audio/visual media in the other split. The menu command (**Insert ▶ Media Time Stamp**) does not by default have a keyboard shortcut, but one can be added if you anticipate making heavy use of this feature ([section A.1](#)).

A new script format, **Format ▶ Scriptwriting ▶ Transcript**, designed especially for the transcription of audio and video material, has been added to the software. You can put a media file into one split and write in another. The current time stamp will be inserted when you press the **Tab** key on a new line. In conjunction with the **⌘ Return** shortcut to pause & play the media while you type, Scrivener can be an effective subtitling and transcription tool.

### Browse the Web from Within Scrivener

It is now possible to, in a limited fashion, browse the Web from within Scrivener, when starting from a page that is being viewed in the main editors or the Bookmarks preview tab. In the past, all links would load in your main browser. To enable this capability, set the **Allow limited navigation in web pages** option, in the Behaviors: Navigation settings pane ([subsection B.4.6](#)).

### Linked inline images can be updated from disk

For those working with inline images in the text editor that have been linked, either to the binder or the file system ([subsection 15.6.4](#)), if one updated the image data externally they would have to reload the project to have the corresponding graphic updated in the editor. Additionally, images that had their size changed on the disk would *not* update the editor's concept of its size, causing them to appear squashed on reload.

Both of these problems can now be solved on the fly by updating the image from the disk ([section 15.6.4](#)).

## Version 3.0.1

### Imported Markdown documents can be converted to rich text

When importing Markdown files with the **File ▶ Import ▶ Import and Split...** menu command, a new option has been provided to convert Markdown syntax into rich text, removing all Markdown syntax in the process. Internally, Scrivener will convert the text to HTML and then import the HTML to RTF format. For simple documents this should suffice, but for more complex texts, using native Markdown conversion engines (such as those provided by MultiMarkdown and Pandoc) will obviously produce the best results, at the expense of taking an extra step.

### Appearance themes now easily accessible

Scrivener has supported appearance themes, the ability to change the colours, fonts and other appearance settings throughout the software, for many years. It is now much easier to switch between these themes from the main **Scrivener ▶ Theme ▶** menu. Read more about creating themes in Settings Presets and Themes ([subsection B.1.1](#)).

**Image size can be requested in percentages for e-books**

When using the image link placeholder syntax ([subsection 15.6.5](#)), it is now possible to request the size of the image in percentage points, as relative to the size of the screen it will be displayed upon, in addition to any point size measurement used for print-based output. Specifying image size in such terms as “100%”, to fill the width of the display, is often more useful than trying to find precisely the right size to display it at, when the shape and scale of the display the ebook is being read upon can so dramatically change from one reader to the next.

**|Extras Pack**

**G**

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A number of examples throughout this manual have been provided for you to work with in a hands-on fashion. There is a downloadable “extras pack” from our website, that you can obtain using the following instructions:

1. Visit the [User Guides download section on our web page](#).
2. Beneath “Scrivener” on the left, select the “Extras Pack” option from the “Select Format” dropdown menu.
3. Click the red download button to the left.
4. If your browser has not already done so, extract the folder from the downloaded .zip file and place it somewhere convenient.

The files are all numbered so you can easily find them in the folder.

# Credits & Acknowledgements





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## Concept, Interface, Design and Development

Keith Blount

### Additional Design

Ioana Petra'ka

### Documentation

Keith Blount

Ioana Petra'ka

### PDF Design

Ioana Petra'ka

### Toolbar, Binder and Template Icons

Janik Baumgartner

### Application Icon

Janik Baumgartner

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---

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Shortcut Recorder is © Contributors of ShortcutRecorder (<http://code.google.com/p/shortcutrecorder/>).

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Bryan D K Jones - VDKQueue (Copyright 2013 Bryan D K Jones)

The Courier Prime font is bundled under the [SIL Open Font License \(OFL\)](#). It was designed by Alan Dague-Greene for John August and released by Quote-Unquote Apps (<http://quoteunquoteapps.com/courierprime>).

### **Additional Images**

Keith Blount

(And Apple, of course)

### **Additional Name Generator Lists**

Cjmiltko - Polish names

Aleix Dorca - Catalan names

### **Exporters**

Fletcher Penney - MultiMarkdown (<http://fletcher.freeshell.org/wiki/MultiMarkdown>)

John Gruber - Markdown & SmartyPants (<http://daringfireball.net>)

Joakim Hertze - SmartyPants localisations

Kee-Lin Steven Chan - ASCIIMathPHP (<http://www.jcphysics.com/ASCIIMath/>)

Vasil Yaroshevich - XSLTMathML (<http://www.raleigh.ru/MathML/mmltex/index.php?lang=en>)

.docx, .doc and .odt conversion is performed using the [Aspose.words Java converters](#) with Oracle's Java SE runtime environment (© Oracle).

### **MultiMarkdown**

Fletcher Penney (<http://fletcher.freeshell.org/wiki/MultiMarkdown>)

### **App Store Receipt Validation**

Receipt validation code for the Mac App Store was created by Graham Lee.

### **Final Draft**

The .fdx and .fcf file formats are the property of Final Draft, Inc., and are used under licence.

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---

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