

Using Microsoft Office 2003 Advanced Publisher Handout

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Introduction

Microsoft Publisher 2003 offers ways to quickly design and generate common documents such as *newsletters, flyers, brochures, greeting cards, calendars, gift certificates, business cards, or websites*. The **Mail Merge** and **Pack and Go Wizard** features expand the capabilities of Publisher to more than just publishing.

Creating Business Cards

Although publications can be created from scratch, using templates from the **Task Pane** is a faster and easier way to develop publications such as business cards, newsletters, brochures, flyers, menus, etc. **Color** and **Font Schemes** can be used to select the colors and fonts that most accurately express the appropriate image and feel. Business cards can be printed at commercial print shops; however, by using Publisher, the business card design can be customized and reprinted at any time. The **Business Cards Options** Task Pane gives full control over the layout, design, and content of the business card.

CREATING A BUSINESS CARD

The **Business Cards Options** Task Pane can be used for both plain paper and special paper. The plain-paper cards use various design sets such as “**Borders**,” “**Bubbles**,” “**Cross Lines**,” and “**Floating Oval**.” The special-paper cards apply to specific designs created by PaperDirect®. This special paper is perforated card stock.

!NOTE:

The perforations in the card stock are so fine that there are no visible marks around the edge of each card. The cards provide a commercially-printed appearance if printed on a laser or inkjet printer.

To create a business card using the Task Pane:

1. In the **New Publications** Task Pane select the “**Business Cards**” option in the “**Publications for Print**” category of the **New from a design** section (see Figure 1). Two sub-options will appear for the “**Plain Paper**” or “**Special Paper**” designs within the design set.
2. Scroll through the designs and select one. The **Business Card Options** Task Pane opens and the selected business card will be loaded to the work canvas (see Figure 2).

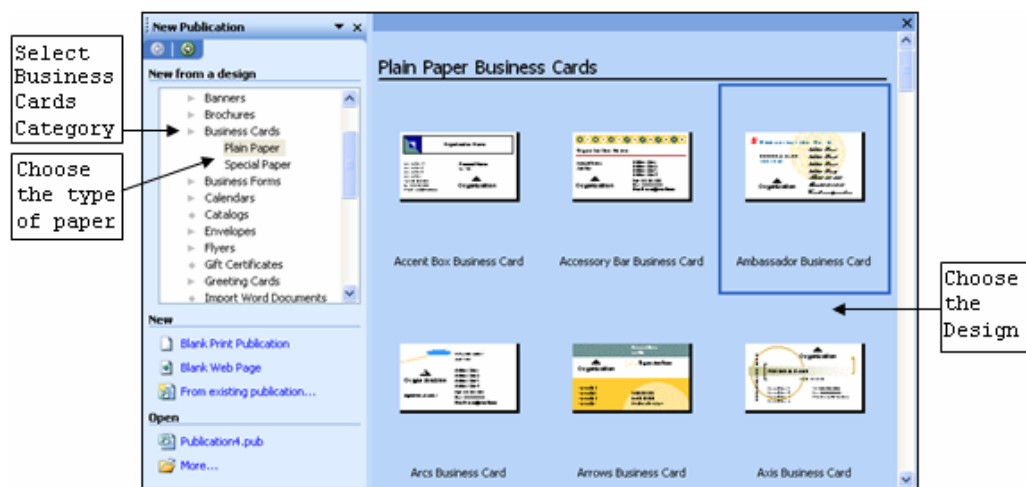


Figure 1 – Business Card Catalog

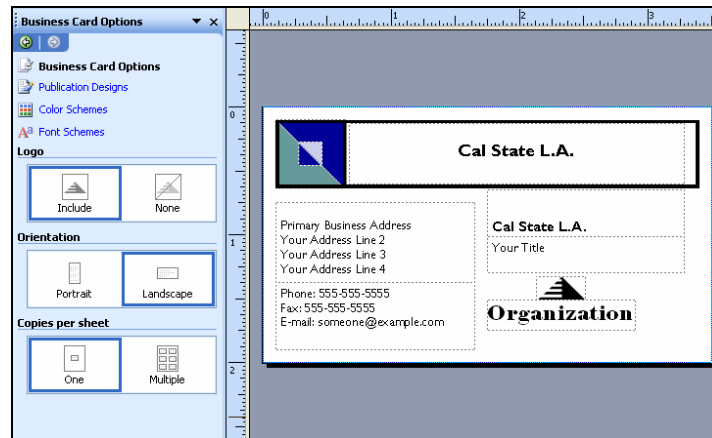


Figure 2 - Business Card Options Task Pane

MODIFYING A BUSINESS CARD WITH THE TASK PANE

After adding personal information to the business card, the card can be modified using the **Business Card Options** Task Pane (see Figure 3). The **Publication Designs** option on the **Business Card Options** Task Pane provides different design sets to choose from. The logo can be removed using the options in the **Logo** section. The **Orientation** section can change the way the publication is printed. The printing options in the **Copies per sheet** section will change the number of copies printed. This only applies to documents that are smaller than the printing media.

To change the color scheme and the font scheme, select the **Color Schemes** and the **Font Schemes** options on the **Business Card Options** Task Pane. For the instructions, refer to the Introduction to Microsoft Publisher 2003 and the Intermediate Publisher 2003 Handout.

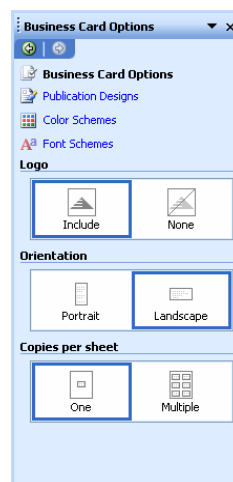


Figure 3 – Business Card Options Task Pane

MODIFYING PERSONAL INFORMATION

Personal information can be updated at any time. Refer to the Introduction to Microsoft Publisher 2003 handout for more information about entering and updating personal information.

To modify the personal information on a business card:

1. Select the **Edit** menu ► **Personal Information...**. The *Personal Information* dialog box opens (see Figure 4).
2. Fill in the necessary information and click the **Update** button.

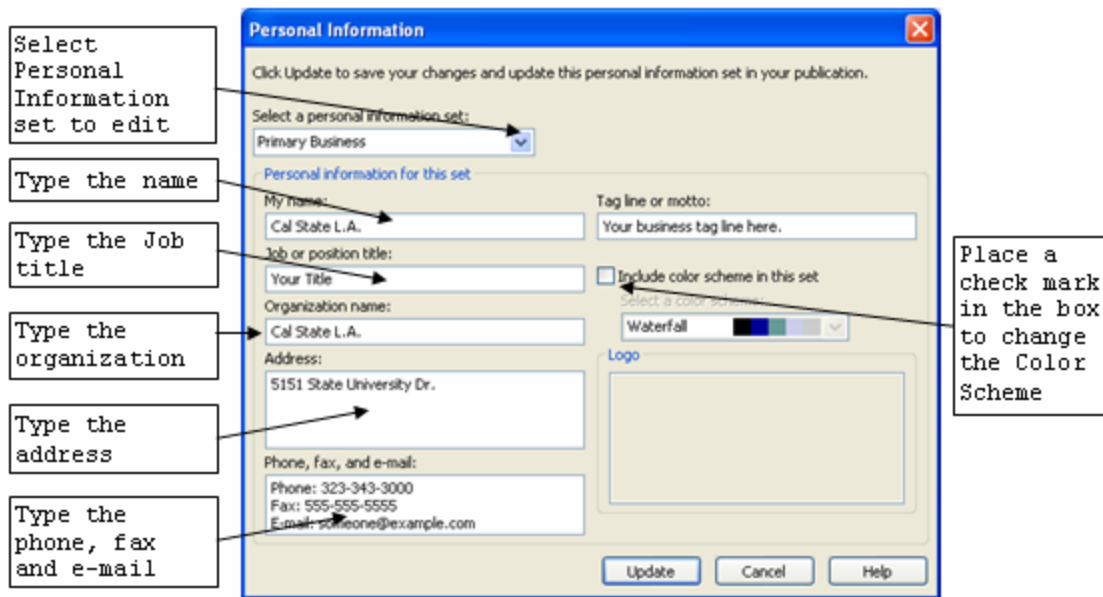


Figure 4 – Personal Information Dialog Box

To insert a new personal information component:

1. Select the **Insert** menu ► **Personal Information**. The sub-menu opens (see Figure 5).
2. Select the personal information component to add. The personal information component will appear on the center of the current view.
3. Rewrite, reformat, resize, and move the component as necessary.

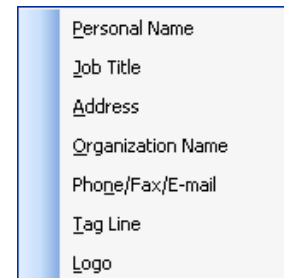


Figure 5 - Personal Information Components

To delete personal information components:

1. Select the personal information component to be deleted.
2. Select the **Edit** menu ► **Delete Object**.

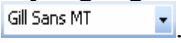

EDITING A BUSINESS CARD



Business cards created from Publisher templates usually have the *Organization Name*, *Personal Name*, *Job Title*, *Logo*, *Address*, and *Phone/Fax/E-mail* text boxes. Text can be manually formatted or edited, and the graphics on the business card can be changed to suit user preferences.

To edit text:


1. Select the text box to be edited.
2. Delete the old text then type the new text inside the text box.

To format text:

1. Change the font type by highlighting the text and clicking the **Font** drop-down list on the **Formatting** toolbar .
2. Change the font size by highlighting the text and clicking the **Font Size** drop-down list .

- Align the text by highlighting the text and clicking the any of the **Align** buttons .
- Change the font color by highlighting the text and selecting the text color from **Font color** drop-down list button .

To modify a graphic using the wizard:

- Click a graphic object to select it. The **Wizard** icon  will appear below the selected placeholder.
- Click the **Wizard** icon and a selection menu containing different objects will open in the **Task Pane**.
- Select the new graphic to apply by clicking it. The object will be replaced with the new choice.

!NOTE:

The graphic wizard will be different based on the type of graphic object on the publication. Not all of the graphics come with a wizard.

PRINTING A BUSINESS CARD

The number of cards printed on each piece of paper can be selected from the **Copies per Sheet** section of the **Business Card Options** Task Pane. This option automatically sets the page format. To specify the number of copies and printing options manually, use the printing option.

To print a business card:

- Select the **File** menu ► **Print** command. The *Print* dialog box opens.
- Click the **Change Copies per Sheet...** button to alter the margins between each card printout. The *Small Publication Print Options* dialog box will appear (see Figure 6).
- Click the spin boxes to adjust the margins. The preview window will display how the printed sheet will look like with the adjusted margins ► **OK** button ► **OK** button.

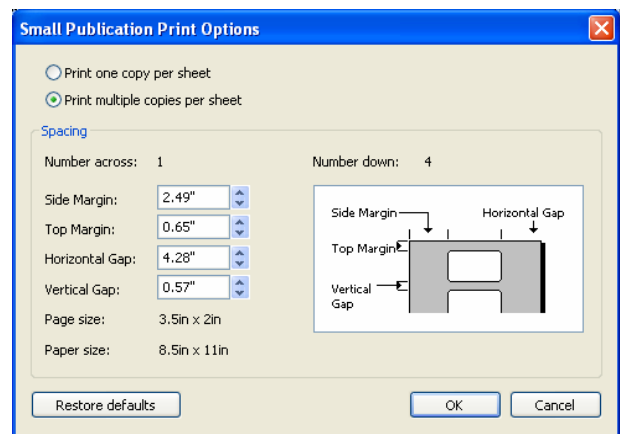



Figure 6 – Print Dialog Box

!NOTE:

The business card can also be printed by clicking the **Print** button  on the **Standard** toolbar. In this case the *Print* dialog box will not open, and the printing options cannot be changed prior to printing.

Generating Brochures

A brochure is a booklet that contains promotional material or product information. Brochures are used to advertise the products and services of the company or some events in details.

CREATING A BROCHURE

A brochure is one of the more complicated publications to create. The Publisher **Task Pane** provides convenient functions for creating a brochure.

To create a brochure using the Task Pane:

1. In the **New Publication** Task Pane select the “**Brochures**” option in the “**Publications for Print**” category (see Figure 7). The sub-options for different brochure types will appear.
2. Scroll through the designs and select one by clicking it.
3. Once the desired brochure design is selected, the *Personal Information* dialog box opens (see Figure 4).
4. Fill in the necessary information and click the **OK** button; or click the **Cancel** button to do it later.



Figure 7 – Brochures Catalog

!NOTE:

If the personal information was previously defined, the prompt will appear again.

The brochure created using the **Task Pane** options is two-sided (see Figure 8 and Figure 9). The inside panels are on the backside of the page and contain more detailed information.

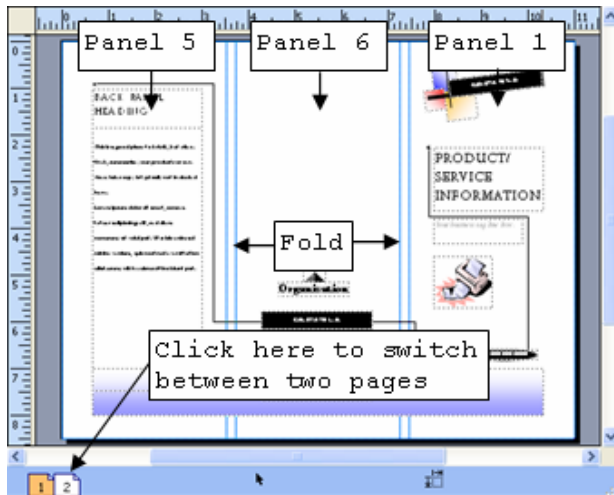


Figure 8 – The Outside Panels of the Brochure

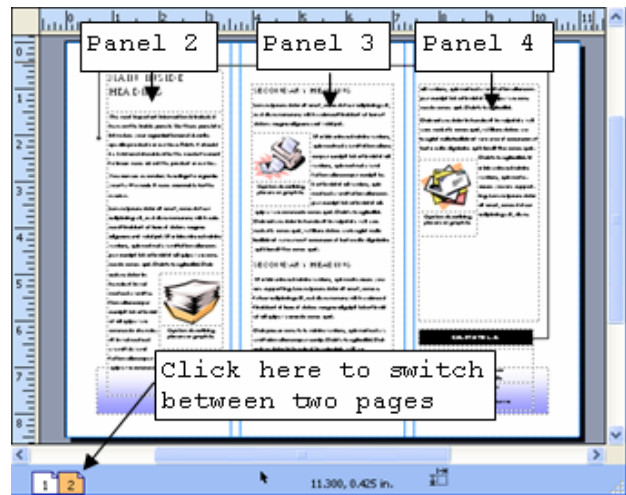


Figure 9 – The Inside Panels of the Brochure

MODIFYING A BROCHURE WITH THE TASK PANE

After creating a brochure by using the templates in Publisher, the existing text and graphics can be modified. Many characteristics of the brochure can be altered with the **Brochure Options** Task Pane (see Figure 10).

The **Brochure Options** Task Pane contains the entire available design set. The **Page Size** option can be changed by selecting the “*3-panel*” or “*4-panel*” folding type. There is a section to include or exclude the **Customer address**. There are also options to choose the desired form in the **Form** section. The form will be added onto the last panel of the inside panels. If no forms are desired for the brochure, select the “*None*” option.

To change the color scheme and the font scheme, select the **Color Schemes** and the **Font Schemes** options on the **Brochure Options** Task Pane. For the instructions, refer to the Introduction to Microsoft Publisher 2003 and Intermediate Microsoft Publisher 2003 handouts.

!NOTE:

The paper size of the brochure can be either letter size (with two parallel folds that contain three panels on the front and back) or legal size (with two parallel folds that have four panels on each side of the brochure).

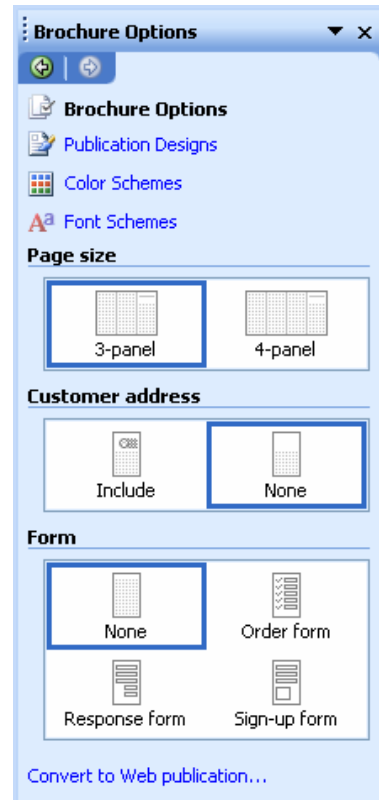


Figure 10 – Brochure Options Task Pane

EDITING A BROCHURE

The **Brochure Options** Task Pane is enhanced with a variety of designs, a large collection of color schemes, and other functional characteristics used for creating a professional brochure. In addition, it serves as a guide for writing the content that is added in each panel of the brochure.

To add content to brochure:

1. Click inside the text box to add or replace text. The existing text inside the text box will automatically highlight.
2. Type the text. The new text will overwrite the existing text.
3. Create a new text box to add additional information to the brochure or delete a text box to remove information.

PRINTING A BROCHURE

The brochure needs to be printed on the both sides of a sheet of paper. Many printers have an option called duplex printing that allows automatic printing on both sides of the paper. Check the instructions for the printer to see if it supports duplex printing.

To print a brochure:

1. Select the **File** menu ► **Print...** command. The *Print* dialog box opens.
2. Choose the necessary options ► **OK** button.

!NOTE:

Refer to the Introduction to Microsoft Publisher 2003 handout for advanced print settings.

Creating Envelopes

Microsoft Publisher offers complete publishing tools. The envelope feature is best used when it is necessary to design a custom envelope to match the contents of what it contains. This feature creates a professional feel to the receiver.

CREATING AN ENVELOPE

Various patterns of an envelope can be easily designed in Publisher by using the **Publisher Task Pane**. Envelope designs can be applied to standard envelopes and adjusted to accommodate the size of custom envelopes.

To create an envelope:

1. In the **New Publications** Task Pane select the “*Envelopes*” option in the “*Publications for Print*” category (see Figure 11). Two sub-options for paper will open – the “*Plain Paper*” or the “*Special Paper*” option.

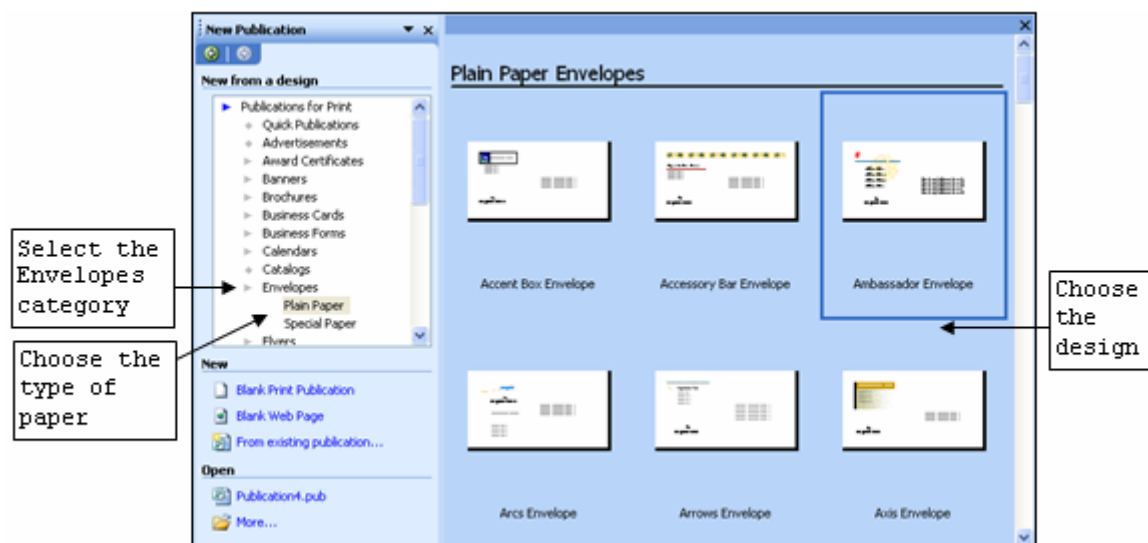


Figure 11 – Envelopes Catalog

2. Scroll through the designs and select one. The *Microsoft Publisher* message box will appear ► **OK** button. The *Personal Information* dialog box opens (see Figure 4).
3. Fill in the necessary fields and click the **Update** button; or click the **Cancel** button to ignore this feature.

MODIFYING THE ENVELOPE WITH THE TASK PANE

The **Envelope Options** Task Pane simplifies envelope modification (see Figure 12). The **Publication Designs** option provides the link to the entire envelope design database. The color scheme and font scheme can be changed with the **Color Schemes** and the **Font Schemes** options. The user can include a logo by using the **Logo** option; envelope size can be selected with the **Size** option.

!NOTE:

The **Size** options allow the choice between two sizes: # 6 3/4 (3 5/8" x 6 1/2") and # 10 (4 1/8" x 9 1/2"). For more options:

1. Select the **F**ile menu ► **P**age Setup.... The Page Setup dialog box opens (see Figure 13).
2. Select “**Envelopes**” in the *Publication type* section of the *Layout* tab.
3. Select the desired options ► **OK** button

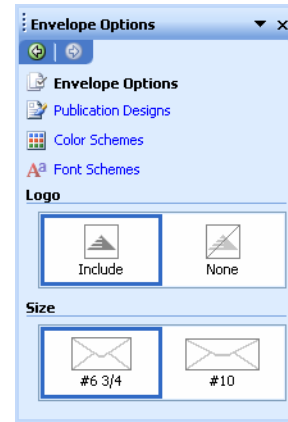


Figure 12 – Envelope Options Task Pane

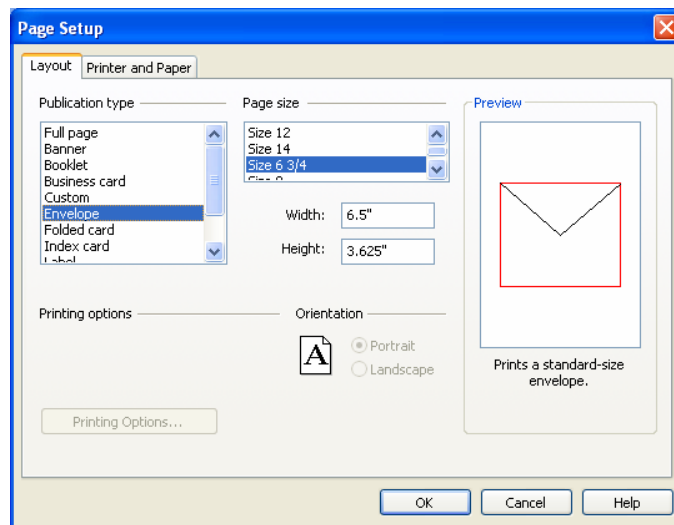


Figure 13 – Page Setup Dialog Box

SAVING AN ENVELOPE DESIGN

An envelope design may need to be saved as a template for future use. Publisher provides an option for saving a design.

To save an envelope design:

1. Select the **F**ile menu ► **S**ave **A**s.... The *Save As* dialog box opens.
2. Select “**Publisher template (*.pub)**” in the *Save as type...* drop-down box. The “**Templates**” directory should automatically appear in the *Save in...* drop-down box.
3. Type the file name in the **File name:** text box ► **Save** button.

PRINTING AN ENVELOPE

After designing the envelope and entering the appropriate address information, the envelope is ready to print. Before printing, select the appropriate size for the envelope. If the envelopes are printed for mass mailing, it may be useful to use the **Mail and Catalog Merge** function so that different addresses from a mailing list print directly onto each envelope (see Mail and Catalog Merging).

To print an envelope:

- Select the **F**ile menu ► **P**rint.... The *Print* dialog box opens ► **O**K button.

!NOTE:

If the printer has an envelope feeder, click the **Properties...** button and select “**Envelope Feeder**” by clicking the *Paper source:* drop-down arrow in the *Paper/Quality* tab.

Mail and Catalog Merging

The **Mail and Catalog Merge** feature is a quick and easy way to send personalized publications such as postcards, brochures, and newsletters to groups of people. The **Mail and Catalog Merge** utilizes two types of files: a publication form and a data source. The publication form contains the information common to all letters. The data source contains variable non-repeating information such as names and addresses. The common text needs to be entered into a publication form only once. When the publication form merges with the data source, the variable information is inserted into a specified location.

CREATING AN ADDRESS LIST

The first step in the **Mail and Catalog Merge** process is to create a Publisher address list. Think of the address list as an index card file where each index card contains one record, or all the information about one person. Each individual piece of information in a record is called a field. For example, last name, first name, and telephone number are all fields. An address list can be created within Publisher or by using a compatible data source created in another program. It is easy to create a new address list in Publisher since Publisher provides default fields for commonly used information.

To create an address list:

1. Create a publication or open an existing one.
2. Select the **T**ools menu ► **M**ail and Catalog Merge ► **M**ail and Catalog Merge **W**izard. The **Mail and Catalog Merge** Task Pane will open (see Figure 14).
3. Click the **Next: Select Data Source** link in the **Step 1 of 5** task pane section. The next step opens.
4. Click the **Type a new list** option button in the **Select data source** section (see Figure 15).
5. Click the **Create...** link. The *New Address List* dialog box opens (see Figure 16).

!NOTE:

Users can add, delete, or rename the fields in the *New Address List* dialog box. To modify the fields, click the **Customize...** button and make changes as desired.

6. Enter the information for each field.
7. Click the **New Entry** button to add another person to the list.
8. Click the **Close** button when finished. The *Save Address List* dialog box opens.
9. Enter a file name in the **File name:** text box and select a destination under the **Save in:** drop down list ► **S**ave button. The *Mail Merge Recipients* dialog box opens (see Figure 17) ► **O**K button.

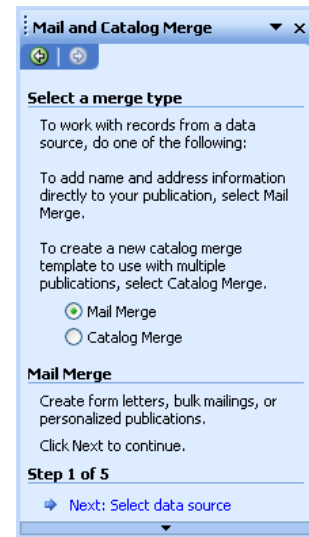


Figure 14 – Mail and Catalog Merge Task Pane (Step 1 of 5)

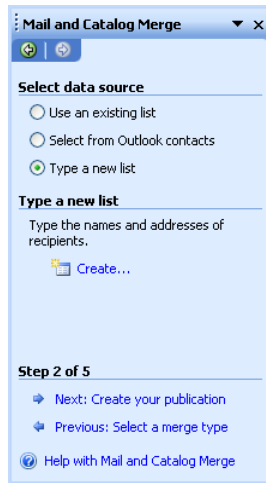


Figure 15 – Mail and Catalog Merge Task Pane (Step 2 of 5)

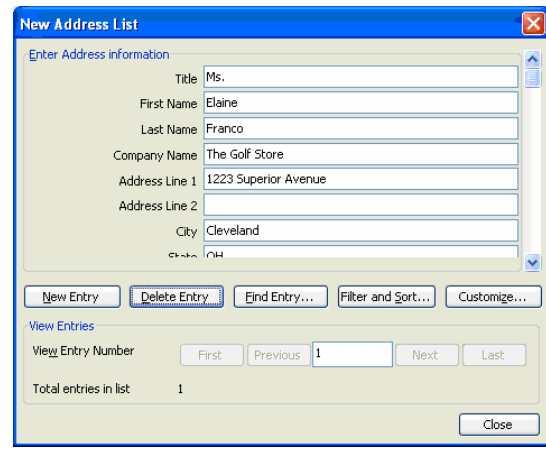


Figure 16 - New Address List Dialog Box

!NOTE:

The *Mail Merge Recipients* dialog box contains information for each individual that has been entered. To exclude a person on the list when printing, simply deselect the check box for that individual.

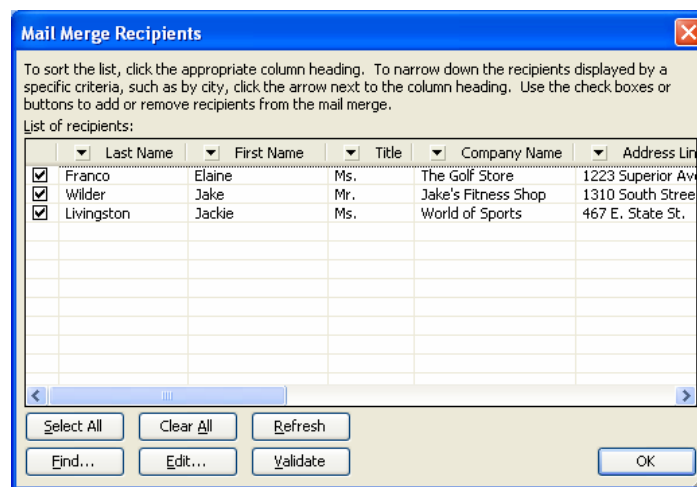


Figure 17 – Mail Merge Recipients Dialog Box

MERGING THE ADDRESS LIST TO THE PUBLICATION

Once a merge is started, the next step in the *Mail and Catalog Merge* Wizard is to identify the data source.

Attaching a Data Source

An address list created in a Publisher or any other data source that contains necessary information can be merged into the publication. The data source can be a database (such as an Access database), a spreadsheet (such as an Excel worksheet), a Word table, a text file that uses characters (delimiters) such as tabs or commas to separate the fields, or an Outlook contact list. The data source must be attached to the publication so that the fields containing the variable information can be inserted.

To open the data source:

1. Click the **Use an existing list** option button in the **Select data source** Task Pane section and click the **Browse...** link. The *Select Data Source* dialog box opens.

!NOTE:

2. When creating a data source at the beginning of the Mail Merge process, the **Browse...** link will not be available. If another data source is used, click the **select a different list...** link. Click the **Edit recipient list...** link, if a correction must be made to the created Address List. Otherwise, click the **Next: Create your publication** link in the **Step 2 of 5** Task Pane section.
3. Select the source file and click the **Open** button. The *Mail Merge Recipients* dialog box opens (see Figure 18).
4. Click the check boxes on the left side to deselect the names that should not be included in the merge ► **OK** button. The data source name will appear in the **Mail and Catalog Merge** Task Pane (see Figure 19) ► **Next: Create your publication** link.

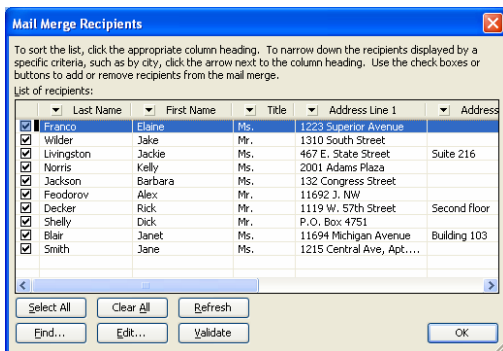


Figure 18 - Mail Merge Recipients Dialog Box

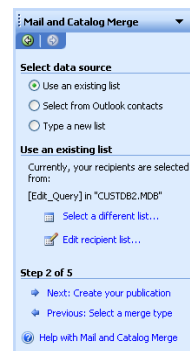


Figure 19 – Mail and Catalog Merge Task Pane (Step 2 of 5)

Inserting Merge Field Codes

The next step is to insert the merge field codes into text boxes in a publication form. Field codes are inserted into any point of the publication. When inserted, a field code is enclosed in chevrons, for example “<<*First Name*>>.”

To create an envelope containing the merge fields:

1. Click inside the text box where the address should be inserted.
2. Select the **Address block...** link on the **Mail Merge** Task Pane (see Figure 20). The *Insert Address Block* dialog box opens.
3. Select the information to be included ► **OK** button.

To create a letter:

1. Click inside the text box where the merge field should be inserted.
2. Click the **Title** spin box to select the format for each merging field.

!NOTE:

When the box includes additional options, a drop-down arrow will be displayed on the right of the box (see Figure 21). Click it to select an option.



Figure 20 – Mail and Catalog Merge Task Pane (Step 3 of 5)

3. Select the **Greeting line...** link on the **Mail Merge** Task Pane. The *Greeting Line* dialog box opens. Select the greeting format ► **OK** button.
4. Select the **Address fields...** link and select the necessary field to insert ► **I**nsert button.

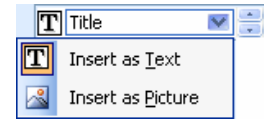


Figure 21 – Available Formats for Merging Fields

Move the inserted fields to the appropriate locations in the text and make any needed spacing and punctuation changes (see Figure 22) ► **Next: Preview your publication** link.

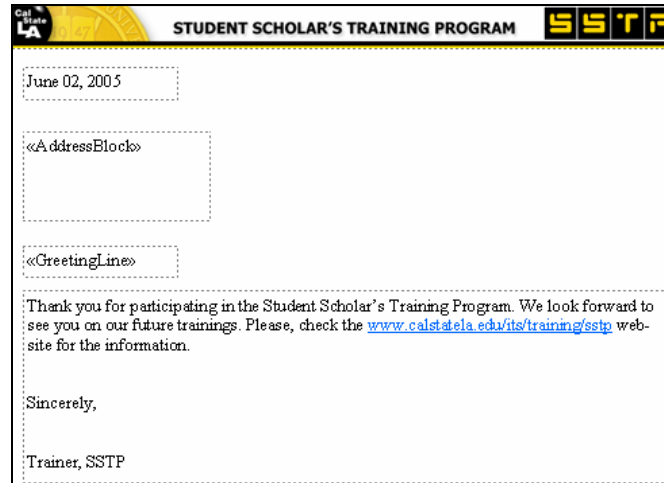


Figure 22 - Mail Merge Letter

PREVIEWING THE MERGED PUBLICATION

Preview the publication with the merged data before actually performing the merge to check the formatting, correct spelling errors, and confirm accuracy (see Figure 23). Use the arrow buttons << >> to see other merge letters. If there are mistakes in merged fields, use the **Edit recipient list...** link on the **Mail and Catalog Merge** Task Pane, if the mistakes are in the general text, click the **Previous: Create your publication** link under the **Step 4 of 5** section at the bottom of the **Mail and Catalog Merge** Task Pane. After making any needed changes, click the **Next: Complete the merge** link.

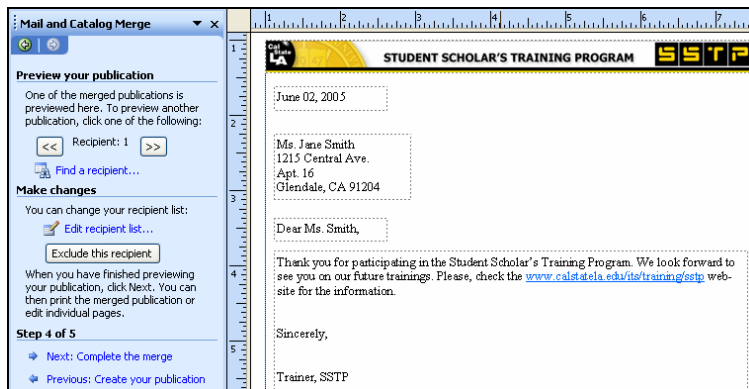


Figure 23 – Preview the Publications



Figure 24 - Step 5 of 5 of Mail and Catalog Merge Task Pane

COMPLETING THE MERGE

Completing the merge means that the publication is ready for print. Also, Publisher can create a new publication with the merged pages, and add merged pages into an existing publication. If needed, use the **Previous: Preview your publication** link to go to the previous step (see Figure 24).

PRINTING MERGED PUBLICATIONS

When printing merged publications, all or a select range of publications can be printed. For example, only first five merged publications can be printed, or choose to print merged publications seven through fifteen.

To print merged publications:

1. Click the **Print...** link on the **Mail and Catalog Merge** Task Pane. The *Print Merge* dialog box will appear (see Figure 25).
2. Click the **Test** button to print the results of one merged publication to see how it looks.
3. Select the necessary printing options ► **OK** button.

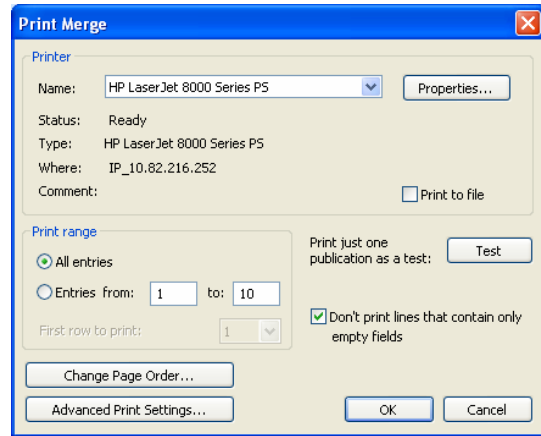


Figure 25 - Print Merge Dialog Box

Pack and Go Wizard

The *Pack and Go Wizard* can be used to compress and save the publication to an external storage media to transport it. The *Pack and Go* Wizard can include linked files, such as another publication or an Excel worksheet with a publication. The *Pack and Go* Wizard can also save the files to a folder on the hard drive for copying to a portable storage medium.

TrueType fonts can also be embedded into the publication, which will ensure that the proper fonts are used with the publication when it is brought to another computer which may not have the same fonts in its font bank.

USING THE PACK AND GO WIZARD

The *Pack and Go* Wizard will create a “*Readme.txt*” file along with the compressed publication. The text file can be opened in **Notepad**. The file includes a packing list of the packaged files and instructions on how to unpack the files and open the publication.

To use the Pack and Go Wizard:

1. Select the **File** menu ► **Pack and Go** ► **Take to a Commercial Printing Service...** The *Pack and Go Wizard* dialog box opens (see Figure 26) ► **Next >** button.

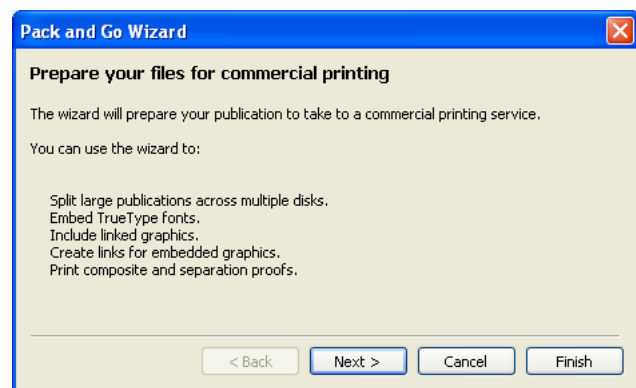


Figure 26 – Pack and Go Wizard Dialog Box

2. Select the location where the publication should be packed. Select **A:** to save it in the 3½ floppy disk; or click the **Browse...** button to specify a different destination (see Figure 27) ► **Next >** button.

!NOTE:

When the option **A:** is selected, the *Pack and Go Wizard* will ask to insert another floppy disk during the packing process if the publication package is larger than the storage capacity of a floppy disk.

3. Select the options to include by clicking the check boxes (see Figure 28) ► **Next >** button.

!NOTE:

Some computers may not have the same fonts used in the publication. Selecting the *Embed TrueType fonts* option will include all the fonts used into the publication.

4. Click the **Finish** button. Publisher will start the compressing process (see Figure 29).

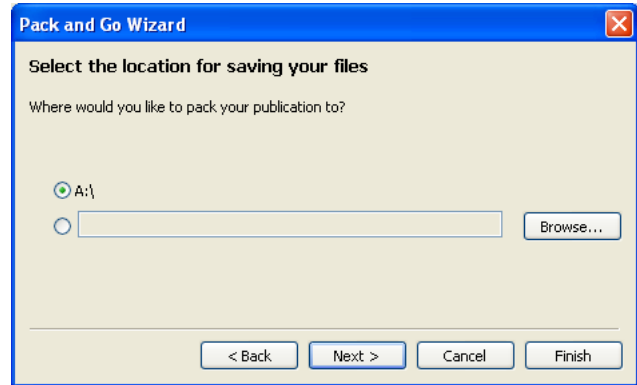


Figure 27 – Pack and Go Wizard Dialog Box (Select the Location)

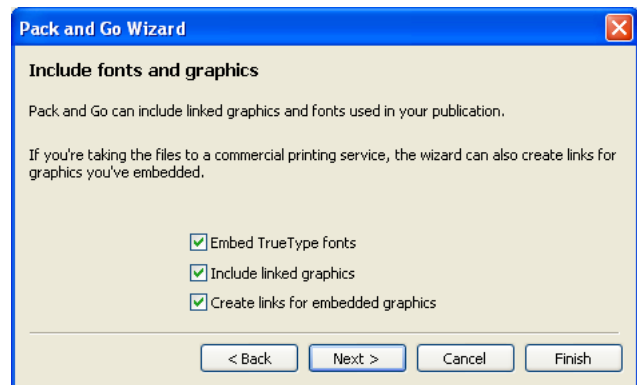


Figure 28 – Pack and Go Wizard Dialog Box (Include Fonts and Graphics)

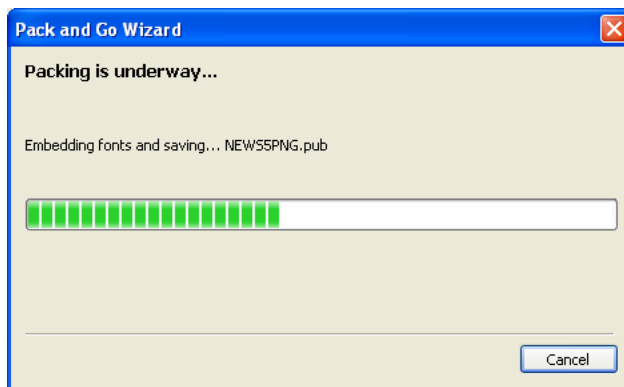


Figure 29 – Pack and Go Wizard Dialog Box (Compressing)

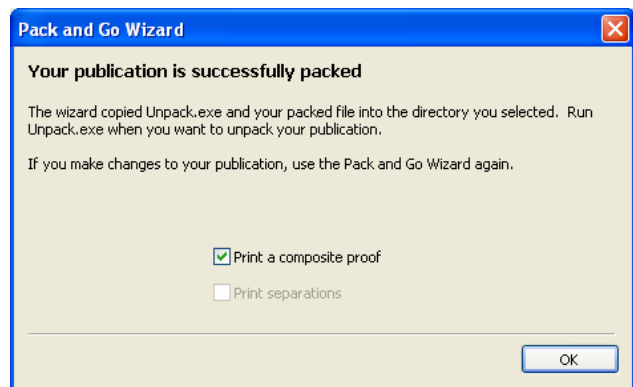


Figure 30 – Pack and Go Wizard Dialog Box (Completing)

5. Once the publication is packed, select the *Print a composite proof* option by clicking the check box (see Figure 30) ► **Next >** button.**OK** button.


!NOTE:

If the *Print a composite proof* option is selected, the wizard will print a copy of the publication automatically when finished.

UNPACKING

The “*Readme.txt*” file contains instructions on how to unpack the publication.

To unpack the files:

1. Insert the first disk with the packed files into the appropriate drive of the computer.
2. Navigate to the location that contains the packed Publisher files.
3. Double-click the **unpack.exe** icon  unpack.exe.
4. Type the path to the folder where the unpacked files should be saved, or browse for a folder ► **Next** > button. The unpacking process will start.

!NOTE:

If there are multiple disks, insert each disk when prompted.

5. When the publication is unpacked, click the **OK** button.

To open the publication in Publisher, navigate to the folder that contains the unpacked files, and double-click the file with the “*.pub*” extension.