Class Description
This is an introduction to Microsoft Publisher, with a focus on choosing a template and modifying it to meet your needs.

Class Length
One and one-half (1½) hours

Introduction
Microsoft Publisher is an entry-level desktop publishing program (the big two used by professional graphic artists are Adobe’s InDesign and Quark’s QuarkXPress) targeted towards small businesses and organizations lacking a professional page designer. It can produce brochures, newsletters, menus, postcards, and more and prepare these documents for self-printing or sending to a commercial printer.

Although much of what Microsoft Publisher does can be done in Microsoft Word, it has more emphasis on page layout and page design whereas Microsoft Word has more emphasis on text composition and proofing.

Knowledge of Microsoft Word is a great benefit to learning Microsoft Publisher.

Objectives
- Learn how to create a new document from a template
- Become familiar with the various ribbons
- Learn how to change Color Schemes and Font Schemes
- Learn how to format text
- Learn how to change a picture
- Learn how to use Master Pages
- Learn how to create a publication from a blank page
- Understand how to insert various types of objects into a publication

This manual is a handout for you to keep. Please feel free to use it for taking notes.
Creating Your First Publisher Document

By default, Microsoft Publisher opens to the New template gallery. If you are connected to the Internet, Microsoft Publisher will, by default, open to the New template gallery with the ‘Featured’ templates displayed. Unless you see something that ‘jumps out’ at you, it is best to use the search function. You can click on any of the ‘Suggested searches’ listed beneath the search window, or type directly into the search box (just above the ‘Suggested searches’) words related to the kind of publication you want to create. Although you can create something ‘from scratch’, a template can not only save a great deal of time, it will usually have been designed by a professional to give a professional appearance.

Once you have begun a search, whether by clicking on a category or by entering text, a ‘Home’ button will appear. Use this to return to the New template gallery. A list of Categories will appear at the far right of the window. Categories can be added (to narrow your search) and removed (to broaden your search) with a single mouse click (toggle on and off). They can also be removed by clicking on the x which appears to the right of a selected category when you hover over the category with the mouse. Search terms can be added to or removed from the search window. Note: there are two scroll bars on the right side of the screen, the far-right bar scrolls the Categories, the bar to its left scrolls the Templates.

At the bottom of the search results, below the thumbnails of Microsoft Publisher Templates, may be ‘Search results from your other Office applications’. Don’t overlook these: there might be a better application for what you are trying to create.
Clicking on a large icon will open a preview with additional information, accompanied by direction arrows on either side of the preview. The arrows can be clicked to move through the selections of the previous screen (which may remain partially visible beneath the preview).

The preview window can be closed by clicking the × in the upper-right corner, returning you to the search results. To the right of the template’s name is the ‘pushpin’ icon used in Windows’s ‘Jump Lists’ to ‘pin’ and ‘unpin’: a single mouse click on the icon toggles between ‘unpinned’ (greyed-out and aligned horizontally) and ‘pinned’ (darkened and aligned vertically).

Once you have found a template you like, simply click on the ‘Create’ button beneath the description. In a few seconds, the template will appear on your screen.

For now, let’s return to the New Template Gallery (close the preview and click on the ‘Home’ button).

Beneath the ‘Suggested searches’ are the labels ‘Featured’ and ‘Built-In’. Click on the Built-In link.

If you are not connected to the Internet, you will see this screen as the starting point for Microsoft Publisher, but with icons for blank 8½” × 11” sheets in portrait and landscape orientations, plus one for ‘More paper sizes’ preceding the icon for ‘Advertisements’ and the Search window greyed-out.

When you click on an icon for one of the categories, icons, grouped into categories of ‘Installed Templates’, ‘More installed templates’ (optional), ‘Blank sizes’, and ‘Manufacturers’, will appear. The first two groups may have sub-
categories; the last group has labels. A vertical scroll bar (right of the icons, but left of the far-right area) will be present, if necessary. The ‘Search for online templates’ and the ‘Suggested searches’ will be removed. The first template in the list will be selected and displayed in the far-right area, along with the options available for that template. A left-click on any of the icons will change the template displayed in the far-right area or, if it is a sub-category, open to a new set of template icons.

Options which can usually be set before creating a new publication from the template are ‘Color scheme’ (drop-down menu) and ‘Font scheme’ (drop-down menu) — these can be changed after the publication has been created. When you change either of these, the colors and the fonts change in the thumbnail in the far-right area, the icons displayed in the main area, and selections are ‘remembered’ for the next time. Additional options may be available: many templates have a ‘Page size’ orientation for Portrait and Landscape; Calendars have ‘Timeframe’ options (‘One month per page’ or ‘One year per page’; and ‘Set Calendar Dates…’ which sets the start and end dates). When finished selecting options, click the ‘Create’ button.

At right is the Mobile Calendar template with a Color scheme of ‘Sunrise’ and a Font scheme of ‘Georgia Bold / Georgia’. Initially, the HOME ribbon is selected. Like other Microsoft Office applications, there is a set of standard ribbons as well as contextual ribbons which appear as needed. Thumbnails of pages appear in the left area and functions as in Microsoft PowerPoint: one or more pages can be selected (use the F or G keys in conjunction with the mouse); selected page(s) can be deleted, reordered by dragging and dropping, new pages can be added, existing pages can be duplicated (right-click on the thumbnail).
The Ribbons

Like the ribbons in other Microsoft Office applications, Microsoft Publisher has ribbons which are always present (HOME, INSERT, PAGE DESIGN, MAILINGS, REVIEW, and VIEW) as well as ribbons which only appear when needed (TABLE TOOLS – DESIGN, TABLE TOOLS – LAYOUT, DRAWING TOOLS, PICTURE TOOLS, TEXT BOX TOOLS, etc.). The ribbons are divided into groups, some of which have a small icon in the lower-right corner: which, when clicked, will open a dialog box (hovering over the icon with a mouse will produce a pop-up which describes what the dialog box does, but unlike other Microsoft Office applications, the pop-up does not display keyboard shortcuts.)

For those familiar with Microsoft Word, there is nothing unusual in this ribbon.

The Clipboard, Font, Paragraph (left side), and Editing (right side) groups of this ribbon are nearly the same as in the HOME ribbon of Microsoft Word. The Styles group is much smaller. The Arrange group is nearly the same as found in Microsoft Word’s PICTURE TOOLS or DRAWING TOOLS ribbons, with the exception that Microsoft Publisher’s Arrange group does not have a Position icon and has a separate Ungroup icon rather than placing that function with the Group icon. Although the Objects group has no comparable group in any of Microsoft Word’s ribbons, its four icons are familiar.

Microsoft Publisher’s INSERT ribbon is roughly similar to the ribbon of the same name in Microsoft Word.

The Pages group has a Page icon for inserting new pages and a Catalog Pages for pulling data from an external source into a publication. The Tables and Illustrations groups (left side) and the Text, Links, and Header & Footer groups (right side) are nearly the same as in Microsoft Word. It is the Building Blocks group which is different: the Page Parts icon is used for adding Headings, Pull Quotes, Reply Forms, Sidebars, Stories (headlines and text), and Tables of Contents; Calendars is used to add a full month (current month, next month, or select a particular month) in a table in a wide range of styles; Borders & Accents is for adding lines, bars, boxes, frames, and more in a wide range of patterns; Advertisements is for adding a wide variety of advertising layouts, attention getters, and coupons.

The PAGE DESIGN ribbon in Microsoft Publisher is similar to the DESIGN ribbon in Microsoft Word, but with a great deal more emphasis on color, with some elements found in Microsoft Word’s PAGE LAYOUT and VIEW ribbons, and some items unique to Microsoft Publisher. You may find that a few quick selections from this ribbon will be all that is needed to make the result of a template ready for printing.

The Templates group is for changing templates and for selecting options in a template (when available; things like number of columns in a newsletter). The Page Setup group’s icons are all found in Microsoft Word’s Page Setup group of the PAGE LAYOUT ribbon and function the same. The Layout group has the Guides icon which can be used to add non-printing lines to each page which can help you position elements on the page; the two Align To options cause objects to ‘snap to’ (be attracted to and jump into place) the lines created by the Guides icon (‘Guides’) and to each other (‘Objects’).
The *Pages* group has icons to **Delete**, **Move**, and **Rename** pages. The vast majority of the ribbon is given over to the *Schemes* group which is almost all **Color Schemes**. This functions as does the *Styles* selector on Microsoft Word’s *HOME* ribbon: an **up arrow**, a **down arrow**, and a **drop-down menu** arrow in a tight vertical stack, but comparable to the **Colors** icon in Microsoft Word’s Document Formatting group of the Design ribbon. Appropriately, the icon to the right of the **Colors** icon in both applications is the **Font** icon which controls the fonts used in each of the Styles used in a document. The last group, **Page Background**, has icons to make a selected picture the background for the entire page (Apply Image), to set background colors for pages (**Background**), and **Master Pages** — a powerful tool for ensuring consistency across multiple pages of a Microsoft Publisher publication (we will look at this tool later).

**MAILINGS Ribbon**

This ribbon is used for merging Microsoft Publisher publications into a mail or e-mail list. We won’t be using this Ribbon.

**VIEW Ribbon**

The two groups in this very short ribbon, **Proofing** and **Language**, is nearly the same as the leftmost groups of the same name in Microsoft Word’s **VIEW** ribbon. It is self-explanatory.

The groups on the right, **Window, Zoom**, and **Show**, are nearly the same as in Microsoft Word’s **VIEW** ribbon, although there are several more items in the **Show** group in Microsoft Publisher. Though the **Views** group is the leftmost group in the **VIEW** ribbon in both Microsoft Word and Microsoft Publisher, they function very differently. Here, there are two icons: **Normal**, for working on pages of a publication, and **Master Page** for accessing the same function as is available in the **PAGE DESIGN** ribbon.

The **Layout** group has two icons: **Single Page** will be used most often, but switching to **Two-Page Spread** is done when working on things like the center pages of a newsletter.

**PICTURE TOOLS – FORMAT Ribbon**

When a picture is selected, this ribbon is present. Very similar to Microsoft Word’s ribbon of the same name, it adds the **Insert** and **Swap** groups; replaces the **Position** icon with an **Arrange Thumbnails** icon, takes the Ungroup function out of the **Group** icon’s functions (giving it a separate icon), and moves the Crop function out of the **Size** group (giving it its own group with a few additional functions).
When the Insertion Point is in a table, both these ribbons will be present. With the exception of the Typography group in the DESIGN ribbon, there is nothing here which will be unfamiliar to a Microsoft Word user; the differences in the ribbons’ layout is minimal.

When a drawing object is selected, this ribbon will be present. Except for the omission of a Position icon in the Arrange group, this is essentially the same as the ribbon of the same name in Microsoft Word.

Microsoft Word has no TEXT BOX TOOLS – FORMAT ribbon. When it has a Text Box selected, it uses the DRAWING TOOLS – FORMAT ribbon. Despite this difference, the items in this ribbon will not be strange to someone familiar with Microsoft Word. The biggest difference is the duplication of the Font group from the HOME ribbon.

**Changing Schemes**

From the PAGE DESIGN ribbon, you can look at different color schemes. You can use the up arrow and down arrow to scroll through multiple lines of color schemes, or click the drop-down arrow to see all the schemes at once (shown here). There are two advantages to looking at — and potentially changing — color schemes from here: (1) as you mouse over a color scheme, the changes will be shown (no need to keep changing selections), and (2) the page is a lot easier to see than the thumbnail in the Template pages.

**Tip:** If you change the size of your Zoom (in the bottom-right corner of the Publisher window) you can see potential changes made by a different scheme for the entire page.
The **Font Scheme** icon is a drop-down menu (note: there is a scroll bar) and offers more choices than are available from the Template pages. This has the same advantages as the color scheme selector.

### Formatting Text

You can, of course, use the **Font** and **Paragraph** groups of the **HOME** ribbon to format text. Here, one of the dates has had a change of font face, font size, color, and alignment. But it has only changed for the one date in April.

You could use the **Format Painter** (*Clipboard* group) to copy the formatting to the other table cells. You could even highlight all the cells in the table and make formatting changes to the entire month, but you would still need to use the **Format Painter** to copy the formatting to other pages (months, in the case of a calendar like this). If the calendar were for a full year (or more), that could take some time. Fortunately, there is an easier way: **Styles** (yep, the same feature as is recommended in word processing!).

Click on the **Styles** icon in the **Styles** group (the only icon) to open a drop-down menu. We can see the second item (‘AccentText6’) is highlighted. This indicates this is the Style being used for the numbers representing dates in the table. A right-click on the Style’s name opens a context menu which includes ‘Modify’ (the second item) which can be used to edit all aspects of the style. But since the one cell has already been modified, we can use the first item in the menu, ‘Update to match selection’. As soon as we click on it, the Style will be updated and applied to all the numbers in the cells of the tables.
Rather than a lot of tedious copying and applying of a format, the new formatting is now applied to the current page ...

... and all other pages.

Changing a Picture and Ensuring Consistency Across Pages

There are two ways to change a picture. Both require selecting the picture as the first step. One way is to select (if not already selected) the PICTURE TOOLS – FORMAT ribbon, look in the Adjust group, and click on the Change Picture icon. This opens a two-item menu. Click on the ‘Change Picture’ option to start the process. The other way to change a picture is to right-click on the picture to open a context menu, click on ‘Change Picture’ (which opens a sub-menu) and then click on the next ‘Change Picture’.

Regardless of the method used, Microsoft Publisher will open a dialog box with two choices:

The first choice is used when you know where the picture is stored on your computer or network; the second is to use Microsoft’s own Bing search to find an image.
When you take the first choice, a standard Windows Explorer (‘File Explorer’ in Windows 8.x) dialog box will open:

Navigate to the file and either double-click the file or click to select and then click the ‘Insert’ button.

The picture has been changed and the old picture has been moved to the ‘Scratch Area’ on the right. If you are certain you won’t need it, click on it to select, then push the $\checkmark$ key.

There is a bit of a problem, however. Compare the appearance of the changed picture on the page where you were working, with its appearance on another page:

Obviously, they are not the same.

There are two main ways to fix this. Both require deleting the images on all pages except one. The next step is to make all the changes you want on the remaining picture.
Here, that has been done and we are ready to start working on the picture, but first ...

Microsoft Publisher’s templates tend to use a lot of grouping of objects. This is useful for keeping a group together when moving it, but often gets in the way of editing items. Because we want to resize the picture, we need to Ungroup these objects. So, with the grouped objects selected, we go to the **PICTURE TOOLS – FORMAT** ribbon and in the *Arrange* group use the **Ungroup** icon to separate these into separate objects.

**Tip:** In the Show group of the View ribbon, be sure to have ‘Boundaries’ checked. It helps you see when multiple objects have been grouped and even makes empty text boxes — which would otherwise be invisible — visible.

Here, the picture has been resized, both the picture and the text box beneath it have been selected (click on one object to select, then press and hold the F key, then click on the second object — there should be a small + next to the mouse pointer) and we are ready to group the objects together. In the *Arrange* group of the **PICTURE TOOLS – FORMAT** ribbon we click on the **Group** icon to do this.
Once the objects have been regrouped, we can copy it as a single item ...

... move to a different page ...

... and then paste. Microsoft Publisher ‘remembers’ the location from which the copy was made and pastes into the same location on the page.

This process requires going to each and every page and doing a paste. If there are a few pages, this is easy enough. But if there are many pages, this can be tedious, so here is another way of ensuring consistency across pages.

Instead of doing a copy of the regrouped object, go to the PAGE DESIGN ribbon and at the far right, in the Page Background group, click on Master Pages. This opens a drop-down menu with a choice of ‘Send to Master Page’. Select this option.

We should see this message. Click the OK button.

The grouped object sent to the Master Page will now appear on all pages of the publication (see next page).
The picture and text box combination has been moved to the Master Page. Note the thumbnails: the picture and text box combination appears on each page and has the same appearance.

**Master Pages**

When the picture and text box combination was sent to the Master Page, the pop-up message gave the keyboard shortcut for editing Master Pages: **F + M**. But, if you cannot remember that, simply go to the **PAGE LAYOUT** ribbon and in the **Page Background** group at the far right, click on the **Master Page** icon to open the drop-down menu. The area of the menu above the horizontal line has two items here: ‘Master Page A (A)’ and ‘None’. These are used to select which Master Page is to be applied to the current page of the publication. (You can have no more than one Master Page per page of a publication.)

After selecting ‘None’ from the menu, the current page (April) has lost the picture and text box combination in the lower-right corner, but it remains on the other three pages. The number of items above the horizontal line will increase with the number of Master Pages in a publication.

Beneath the horizontal line are three items: ‘Send to Master Page’ which we already looked at (currently greyed out because nothing is selected which could be sent to the Master Page), ‘Edit Master Pages’ and ‘Apply Master Page’. The last item opens a dialog box from which you can ‘Select a master page:’ (top item in drop-down menu) and choose the page(s) to which you want it applied (as long as they are consecutive). Since we want to edit the only Master Page in this publication, simply click on ‘Edit Master Pages’. 
There are fewer ribbons when editing a Master Page: **MASTER PAGE** (only present when a Master Page is being edited) and most of the always-present ribbons (**HOME, INSERT, PAGE DESIGN, REVIEW, and View**, but not **MAILINGS**). The **MASTER PAGE** ribbon has three groups: **Master Page**, from which we can create new Master Pages, change a Master Page to a Two Page Master, and choose which Master Page will be applied to particular pages (as in the **Apply Master Page** dialog box on the previous page); **Header & Footer**, from which we can add headers, footers, page numbering, current date, and current time; and the **Close**, which closes the Master Page editor and returns us to the page editor.

Nearly anything which can be added to a specific page can be added to a Master Page. Here, we have switched to the **Insert** ribbon, clicked on **Borders & Accents** in the **Building Blocks** group, and are ready to select ‘Stripes’ from the drop-down menu.

Once selected, Microsoft Publisher centers ‘Stripes’ into the Master Page. But it needs to be moved …

... and resized to the margin edges (note: the margin guides get a little bolder and extend to the edge of the ‘paper’ when dragging the shape to the edges of the margin) …

... which partially covers the picture and text box combination, so we move that upward far enough to clear the ‘Stripes’ border …
... which gives us this:

That is enough here, so we will switch back to the **MASTER PAGE** ribbon and click the **Close Master Page** icon, which ...

... returns us to the regular pages.

As you can see, the additions made on the Master Page have been applied to all the pages in the publication.

Any object placed on a Master Page will stay ‘behind’ all objects placed on one of the pages. Objects on a Master Page cannot be selected from a normal page. Objects on a normal page (not on a Master Page) can be ‘Sent Back’ behind other objects on the page, but not behind objects on its Master Page.
Creating a Publication From a Blank Page

It is easy to return to the templates from Microsoft Publisher: just click on the File tab to the left of the HOME ribbon tab (Microsoft calls this area the ‘Backstage’). Initially, the ‘Info’ area appears. Just move the mouse down to ‘New’ (the second in the list) and click on it.

We are back to the templates.

We will select the first template, a blank 8½” × 11” sheet in Portrait orientation. Click on the template icon. Since there is nothing to configure, you will be taken straight to this:

We want to add some blank pages. There are two ways to do this: (1) right‐mouse click in the thumbnail area to open a context menu and then click on ‘Insert Blank Page’ (this will only add one page at a time); and (2) from the INSERT ribbon, click the Page icon on the far left to open the three item drop‐down menu and click ‘Insert Page…’ to open the Insert Page dialog box. Since three blank pages are desired, the default ‘1’ has been changed to ‘3’. No other changes to the options are needed, so click the ‘OK’ button.

Either way, there are now four blank pages. This is ideal for a newsletter with a front page, a two‐page center, and a back page. Except …
... Microsoft Publisher is not yet treating the second and third pages as a two-page center.

Switch to the View ribbon and in the Layout group, the Single Page icon will be highlighted. Point to the Two-Page Spread icon and the pop-up will give a brief description which is just what we want. Click on the Two-Page Spread icon.

Voila! The second and third pages have been combined.

The first thing we want is a border around the edges, so let’s go straight to editing a Master Page:
Rather than use a border from the Page Parts, we want a simple Rounded Rectangle from the Shapes icon.

The initial box is filled, but clicking on Shape Fill and selecting ‘No Fill’ quickly fixes that.

Next, let’s make the corners more rectangular (reduce the size of the curve). Click on the small yellow diamond at the edge of the shape ...

... and drag it upwards.

Tip: Reducing the size of the curve will leave more space for content. Although a rectangle would make the most space, the curve is less harsh and rigid looking.

As we drag, dotted lines on each corner will move, showing (potential) changes. We’ll release the left button when satisfied with the shape. (Dragging downwards will increase the size of the curve.)
We want to change the outline color to orange ...

... and make the outline wider (heavier).

If the Master Page editor were closed now, the result would be this for the center pages — and that isn’t what we want.

So, instead of closing the Master Page editor, let’s use the leftmost icon on the MASTER PAGE ribbon: Add Master Page, which opens this dialog box:

We don’t care what the Page ID will be and don’t need a Description, but we do need to place a check in the ‘Two-page master’ checkbox. Once done, we click the OK button.

A new Master Page will be created which is a two-page spread. To save time, we’ll go back to the first Master Page, copy the rounded rectangle, then return to the second Master Page and do a paste.
We grab a handle on one side and drag it out to the margins ...

... and repeat on the other side:

We can now close the Master Page editor to return to the publication’s pages. We want to return to the Master Page icon ...

... (making certain we have the center two-page spread selected) and then select the second Master Page. This will change this:

... to this:

We are now ready to start inserting objects into our pages.
Microsoft Publisher makes it easy to insert a monthly calendar into a publication. From the INSERT ribbon, in the Building Blocks group, click the Calendars icon:

There are three main sections to this drop-down menu: ‘This Month’, ‘Next Month’, and ‘More Calendars’. (If you want the biggest range of choices, click on ‘More Calendars...’ (see blue box at bottom of this page); it opens a dialog box with many choices.)

In the ‘This Month’ section, the ‘Boxes – This Month’ looks suitable. Click on it.

The current month is inserted in the center of the page. After dragging the table to the top of the page, we’re ready to insert next month’s calendar:

For a consistent appearance, using the same style, we’ll select ‘Boxes – Next Month’. It will be inserted into the center of the page, so it will need to be moved to produce this:

Clicking on the Calendar icon and then ‘More Calendars...’ opens this dialog box. There is a scroll bar to browse all the available styles. On the far-right side is a month and year selector so that nearly any month can be inserted into your publication.
We’ve switched to the center two-page spread and, in the **Insert** ribbon, in the *Building Blocks* group, clicked the **Building Parts** icon to open a drop-down menu. The menu is divided into sections: ‘Recently Used’ at the top, followed by ‘Headings’, ‘Pull Quotes’, ‘Sidebars’, and ‘Stories’. At the bottom is ‘More Page Parts…’. Like the **Calendar** icon, go straight here for the most choices.

In the ‘Stories’ section, the ‘Portal (Layout 3)’ icon looks appealing. Click on it.

As usual, Microsoft Publisher places the object in the center of the page:

After some moving and resizing, it looks like this:

Here’s a close-up of the areas where text can be added. Just click in an area and start typing.
The next group to the right is the Text group of the INSERT ribbon, we can Draw a Text Box by clicking on the icon and then dragging and dropping the area where we want the text box to be located.

Below the text box we want a picture which has not yet arrived. This is an ideal place to use ...

... the Picture Placeholder.
Again, the object will be placed in the center ...

... but after some moving and resizing, the space has been saved.

Next, we’ve added a second text box, and then clicked inside the first text box.
We’re ready to enter text.
The text has been pasted into the text box, but we can see there is more text than can fit into the box — because there is an indicator.

This is easily fixed. We click on the indicator and the mouse will change to this shape: 🎨

We move the mouse pointer to the second text box and click inside it.

The excess text will be moved into the second text box. We check to see if the overflow indicator appears on the second text box — we may need to overflow text into a third text box. But here, there is plenty of space left over.

There is a lot more possible with Microsoft Publisher, but this should get you started.