

# Lesson 1: Create brochures

## Welcome Page 1 of 8

Welcome to *Advanced Microsoft Publisher 2003*. This course consists of six lessons, each with an assignment and a quiz that together will help you move to the next level of expertise with Publisher.

This course assumes that you already know how to do the following:

- Open and save files, and print your work.
- Use templates and designs to create publications.
- Insert objects from the Design Gallery.
- Work with personal information sets.
- Create one-page publications using a variety of paper sizes, folds, and layouts.
- Create, resize, move, and delete text boxes, and format the text within them.
- Insert and manipulate clip art and other pictures.

This first lesson will review some of those skills, but if you're looking at the preceding list and feeling overwhelmed, you might prefer to start with the *Introduction to Microsoft Publisher 2003* course, where those skills are taught in detail.

This advanced course will extend that list of skills by helping you learn to do the following:

- Create multipage publications with numbered pages.
- Link text boxes to flow stories from one page to another.
- Apply advanced text formatting, such as kerning and character spacing.
- Crop pictures and wrap text around them.
- Insert and format WordArt.
- Fill objects with textures and gradients.
- Prepare a publication for a commercial printing press.
- Perform mail merges.
- Create a Web site.

If those topics sound interesting to you, you're in the right place. Let's get started.

## Getting started

First things first: make sure that you have the latest version of Publisher to stay ahead of the game.



» [Microsoft Office Publisher 2003](#)

## Create a brochure Page 2 of 8

Many businesses use brochures as a marketing tool. The most common type of brochure is a single sheet, printed front and back and folded into thirds, either on letter-size paper (tri-fold) or legal (quad-fold). You can create such brochures in Publisher, and then print copies on your office's printer -- or create a master for a commercial printing service. (Commercial printing services are covered in Lesson 4, so until then, let's

assume you're going to use a printer in your office.)

This lesson teaches you how to create a brochure using one of the brochure templates with step-by-step instructions. Generally speaking, however, you should know how to use templates already. So feel free to strike out on your own if you prefer.

To create a self-mailing, tri-fold brochure, on regular paper, with an order form, follow these steps:

A self-mailer includes an area where you can put the customer's address for mailing, so you don't have to use an envelope to mail it.

1. Start Publisher, and click **Publications for Print**.
2. Click **Brochures**, and then select a design. (For this example, use **Capsules Informational Brochure**.)
3. In the **Brochure Options** task pane, select the following:

**Page size:** 3-panel

**Customer address:** Include

**Form:** Order form

4. Click **Color Schemes**, and then select **Clay**.
5. Click **Font Schemes**, and then select **Binary**. Figure 1-1 shows the brochure at this point.

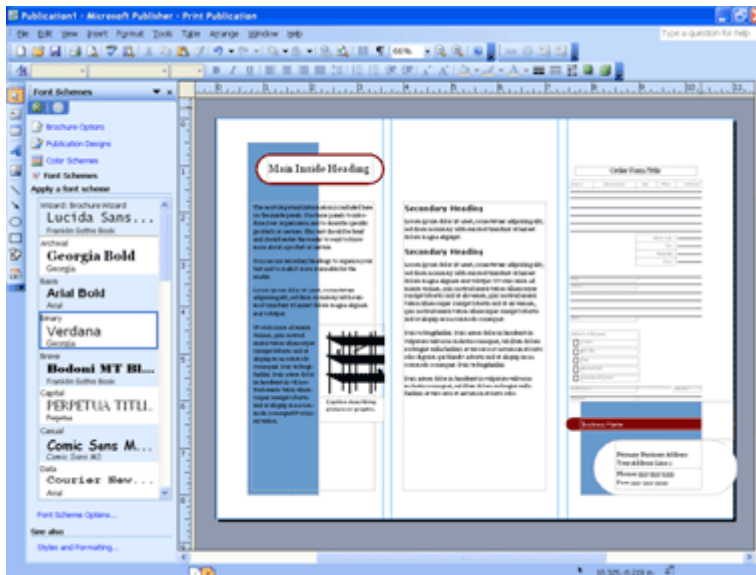


Figure 1-1: A typical brochure, ready to be customized with your own text and graphics.

Now do some exploring if you're a little shaky with your Publisher skills, just to re-familiarize yourself with the interface. Do the following, skipping the ones that you don't think you need to practice:

- Move between pages by clicking the 1 and 2 icons at the bottom of the window.
- Zoom in and out.
- Change the sample text to your own text.
- Change the sample graphics to clip art or photos that are appropriate for your text.
- Change the text formatting for some of the paragraphs, just for practice, including applying different fonts, sizes, colors, attributes, alignment, and so on.

You probably already know the basics of text formatting, right? You can change the font, the size, the color, and so on, just like in any other text-editing program.

But Publisher offers more than most other programs do in terms of text fine-tuning. In addition to those big, obvious formatting items, you can also adjust the following by selecting **Format > Character Spacing**:

- **Scaling:** This is the width of selected characters in relation to the default. You can use it to make certain characters wider. For example, if you selected a capital A and set its scaling to 200%, it would be twice as wide as normal, but the same height. Figure 1-2 shows several different Scaling settings.

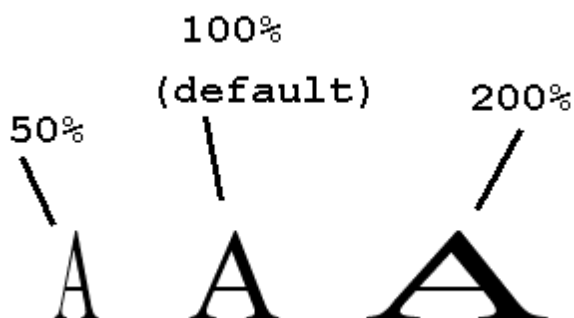


Figure 1-2: The effect of changing the Scaling for some text.

- **Tracking:** This is the spacing between letters. You can enter a precise amount or use one of the presets, Very Tight (75%), Tight (87.5%), Normal (100%), Loose (112.5%), or Very Loose (125%).

For tracking, the presets are available only when using the dialog box method, not the toolbar method. You'll learn about both methods shortly.

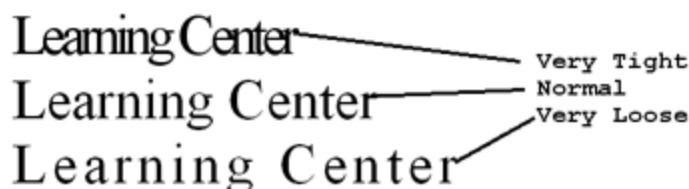


Figure 1-3: The effect of changing the Tracking for some text.

- **Kerning:** This is the spacing between certain select characters based on their shapes. For example, when a capital V and a capital A appear next to one another, the spacing between them can be decreased without the letters touching because of the shape of the letters. Kerning is typically done only for text of a certain point size and higher (typically around 18-point), so it's more for headings than for body text. Figure 1-4 shows an example of some kerned and

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unkerned pairs.

V A      Unkerned

V A      Kerned

Space tightened up

**Figure 1-4: The effect of using Kerning for some text.**

One way to set scaling, tracking, and kerning is with the Character Spacing dialog box, as follows:

1. Select the text to be adjusted.
2. Select **Format > Character Spacing**. The Character Spacing dialog box shown in Figure 1-5 appears.

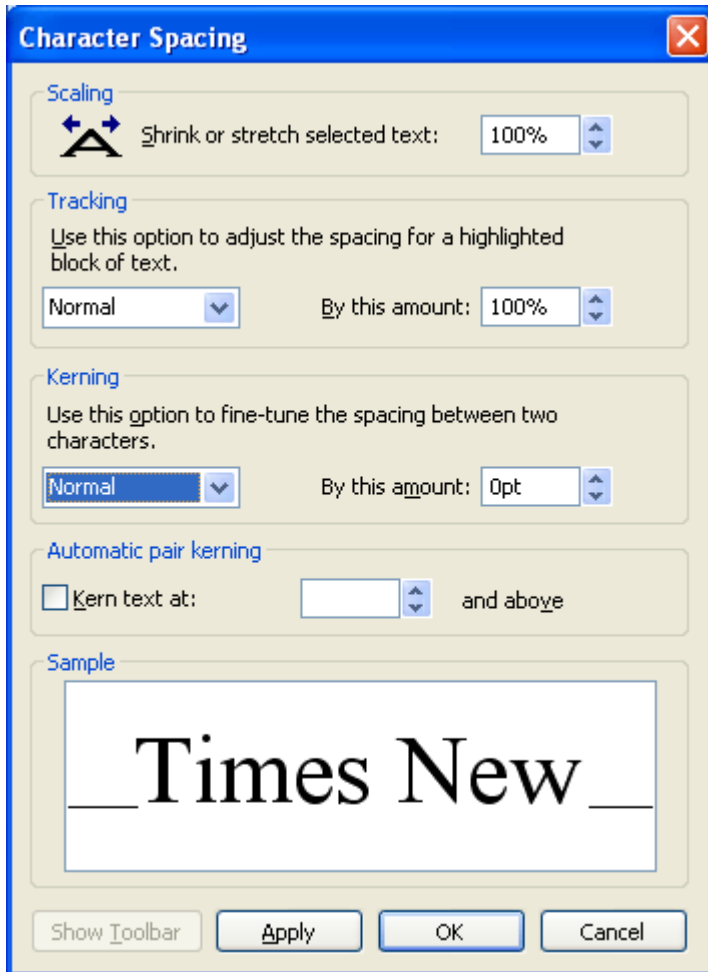


Figure 1-5: Character Spacing dialog box.

3. Set the scaling as needed by increasing or decreasing the percentage.
4. Set the tracking as needed by selecting a preset or entering an exact percentage.
5. Set the kerning by selecting **Normal**, **Expand**, or **Condense**, and then entering a point value.
6. Turn automatic pair kerning on or off. If it's on, enter a point size below which pairs will not be automatically kerned.
7. Click **OK** to accept the new settings.

Character spacing tools are also available on the Measurement toolbar; click the **Show Toolbar** button in the Character Spacing dialog box to view it (or select **View > Toolbars > Measurement** at any time). This toolbar contains text boxes with increment buttons for each of the character spacing settings, as shown in Figure 1-6.

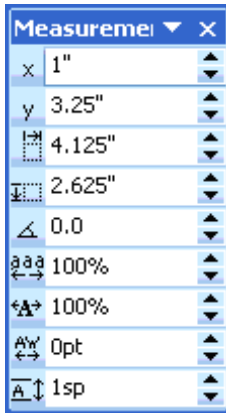


Figure 1-6: The Measurement toolbar.

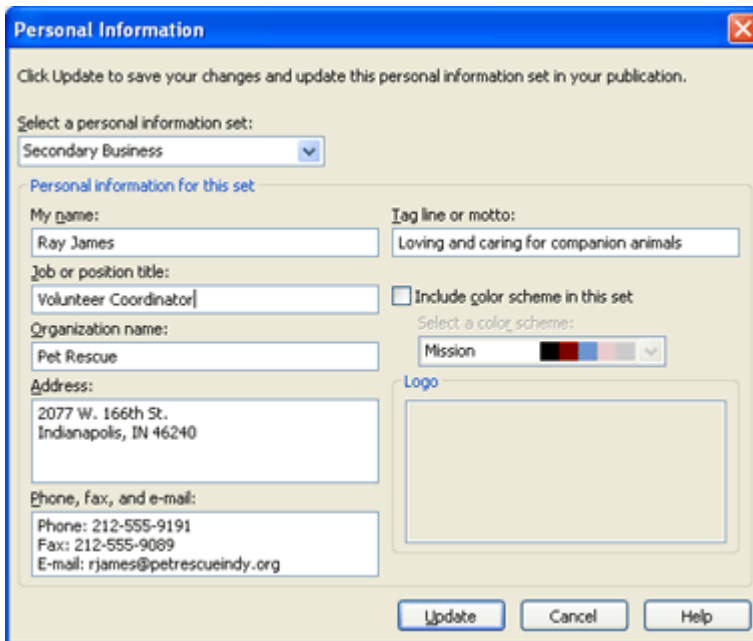
**Personal information sets Page 4 of 8**

You can use personal information sets to save time by allowing your personal information (name, address, phone, and so on) to be automatically entered in publications in which such information is useful. If you took the *Introduction to Microsoft Publisher 2003* course, you worked only with the default set: Primary Business. In this course, you'll work with some of the others. You can have up to four different sets:

- Primary Business
- Secondary Business
- Other Organization
- Home/Family

Do the following in your brochure publication that you've started, to update the personal information in use:

1. Select **Edit > Personal Information**.
2. From the **Select a personal information set** drop-down menu, select **Secondary Business**.
3. Make up a business's information, or use the data shown in Figure 1-7.



**Figure 1-7: Personal Information dialog box with fictional information.**

5. Click **Update**. Notice that several placeholders in the brochure changed to reflect the information you entered. (Zoom in if needed to see it.)
6. Reopen the Personal Information dialog box (**Edit > Personal Information**).
7. From the **Select a personal information set** drop-down menu, select **Other Organization**, and then enter different information.
8. Click **Update**.

Notice that the brochure's placeholders change to reflect the selected set. You can switch between personal information sets for a publication anytime.

### Use a logo in a personal information set Page 5 of 8

You might have noticed in Figure 1-7 that there was an empty **Logo** preview box. You can create and save logos along with your personal information, and after you do so, the logo for an information set will appear in that box.

Follow these steps to create and save a logo in a personal information set:

1. Change back to the Secondary Business personal information set (see the preceding section).
2. In any blank spot on the brochure, insert a logo (**Insert > Personal Information > Logo**).
3. Change the text of the logo to reflect the company name you used for this personal information set. (In Figure 1-7 it was **Pet Rescue**, for example.)
4. Click the Wizard button under the logo to display the Logo Designs task pane, and then select the **Open Oval** design. Close the task pane.
5. Save your work. A box appears asking if you want to save the logo to the Secondary Business personal information set. Click **Yes**.
6. Reopen the Personal Information dialog box (**Edit > Personal Information**) and confirm that the logo now appears to be associated with that set.
7. Delete the logo from the publication, and then save your work again.
8. Reopen the Personal Information dialog box. Notice that the logo is still there. It's part of that set; it will continue to be saved with that set when you create new publications or apply that set to existing publications.

### Change the brochure layout

At any point, you can redisplay the Brochure Options task pane (**View > Task Pane**, and then select **Brochure Options** from the list of task panes) to change any of the following:

- **Page size:** Select between 3-panel (letter-size paper) and 4-panel (legal-size paper).
- **Customer address:** Select Include or None. If you select None, additional placeholder text boxes will appear where the customer address panel

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was before.

- **Forms:** Select None, Order Form, Response Form, or Sign-up Form. (Select each in turn and zoom in to see what kinds of fields they contain. You'll learn how to customize forms later in this lesson.)

## Adjust the alignment guides Page 6 of 8

Notice the bright blue guide lines on the publication; these do not print. They are there to help you place text and graphics consistently. The lines around the edges of the page are called **margin guides**, and the ones in-between columns are called **column guides**, as shown in Figure 1-8.

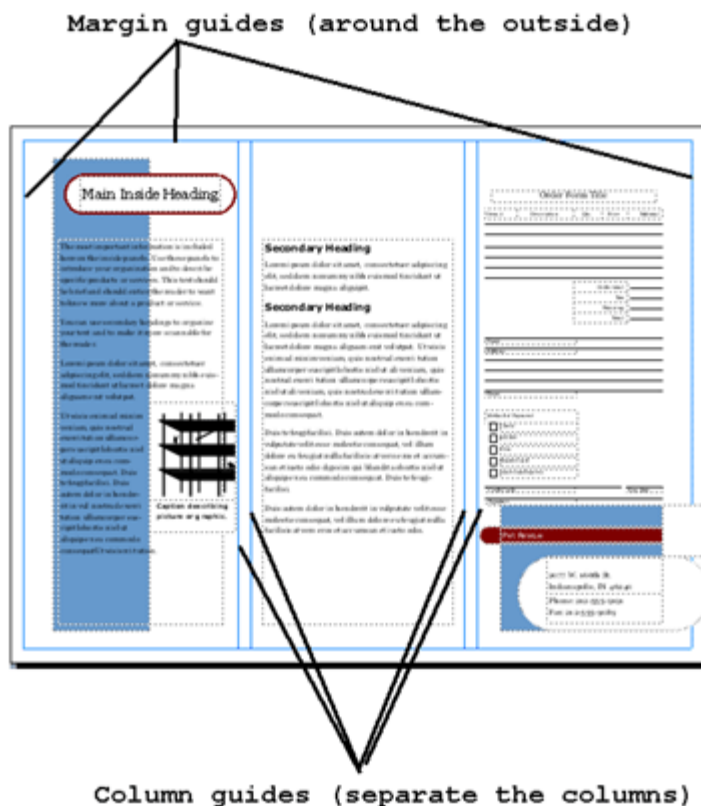


Figure 1-8: Column guides and margin guides.

[Enlarge image](#)

When you use one of the brochure templates to start your brochure, as in this lesson, the guides are automatically set up in the right spots. When you change the page size from 3-panel to 4-panel, or vice versa, Publisher automatically adjusts the column guides.

However, sometimes you might need to make some minor changes to the guides. For example, if you buy special brochure paper that is precreased for easy folding, the three sections are not exactly equal in size. To create a pleasing amount of overlap of the cover panel, the creased panes of the paper are 3 5/8 inches, 3 3/4 inches, and 3 7/8 inches. When you print on this paper, you must adjust the placement of your

text and graphics in your publication so that it doesn't appear off-balance.

To change the guides for such paper, you need to set separate column guides for the two sides of the paper. (On one side, the narrow column is on the left; on the other side, it's on the right.)

Follow these steps to set up the column guides appropriately for such paper:

1. Select **Arrange > Layout Guides**.
2. (Optional) If you want to set margin guides, do so on the Margin Guides tab.
3. On the Margin Guides tab, check the **Two-page master** checkbox.
4. Click the **Grid Guides** tab. (Optional) If you want to change the number of columns, or the space between them, enter those specifications, as shown in Figure 1-9.

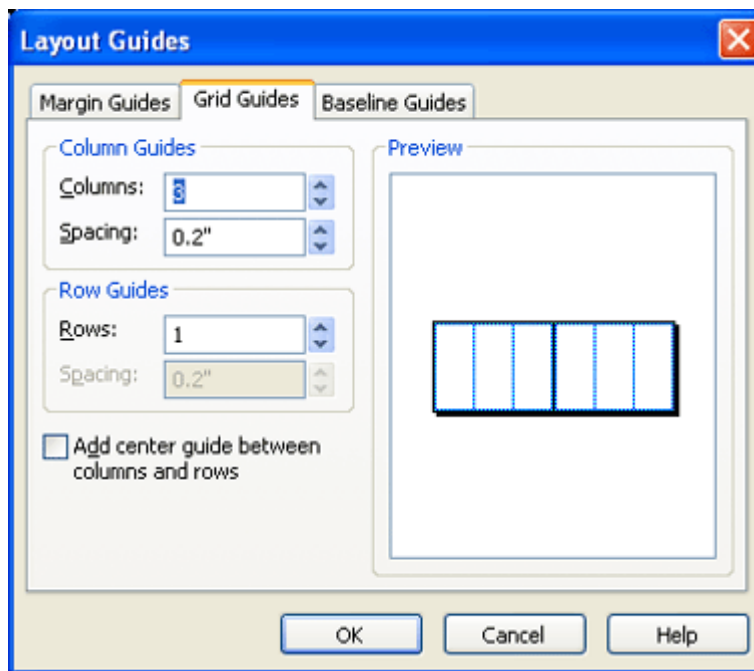


Figure 1-9: Layout Guides Grid Guides tab.

5. Check the **Add center guide between columns and rows** checkbox. (This will make the other steps coming up much easier!)
6. Click **OK** to accept the settings.
7. Select **View > Master Page**. The master page set appears. Notice that there are two master pages, side by side. (You might have to scroll horizontally to see the second one.)
8. Think about where you want the columns to be. On page 1 of the brochure (the one where the brochure cover is in the rightmost panel), you want column dividers at 3 5/8 inches and 6 3/8 inches. On page 2, you want column dividers at 3 7/8 inches and 7 5/8 inches. On the leftmost sample, drag the pink dividers to 3 7/8 inches and 7 5/8 inches.

#### TIP

The leftmost sample on the master represents page 2, and the rightmost sample represents page 1. (Yes, that may seem odd, but think about it. When you publish a book, the first page starts on the right; therefore, odd-numbered pages are always on the right.)

9. On the rightmost sample, you want 3 5/8 inches and 7 3/8 inches for your pink lines, but wait -- the ruler starts with 11 inches for that page. So add 11 to those numbers, and set the pink dividers for that page to 14 5/8 inches and 18 3/8 inches.

10. Click **Close Master View**, and adjust the placement of the text and graphics on the brochure layout to match the new guides.

### Save a publication as a template Page 7 of 8

Whew! That was a lot of work setting those custom guide lines, wasn't it? At this point, you may want to save this brochure as a template, so you can reuse these settings for another brochure later. To do so, follow these steps:

1. Select **File > Save As**.
2. Open the **Save as type** drop-down list, and then select **Publisher Template (\*.pub)**. The **Save In** setting changes to the Templates folder.
3. Enter a name for the template (for example, **Brochure Paper**) in the **File name** text box.
4. Click **Save**.
5. Select **File > Properties**, and then click the **Summary** tab.
6. In the **Title** text box, enter the name for this template as you would like it to appear in lists. In the **Category** text box, enter the desired category (for example, Brochures), as shown in Figure 1-10.

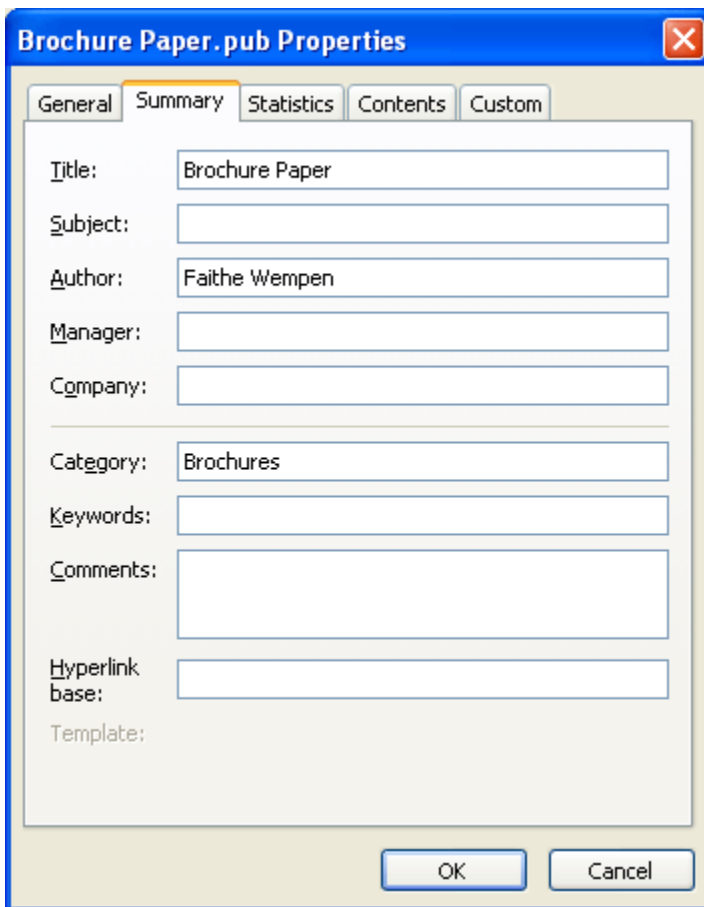


Figure 1-10: Edit the properties for the template file so that it will appear in listings.

7. Click **OK** to close the Properties dialog box.
8. Save the template again, and then close it.

### Start a new publication based on a user-created template

To create a new brochure based on this template, follow these steps:

1. Exit and restart Publisher if you haven't already done so after saving the template. (This step is important; otherwise, your new template may not appear on the list.)
2. In the New Publication task pane, notice that there's a new category: **Templates**. Select it to open it, as shown in Figure 1-11.

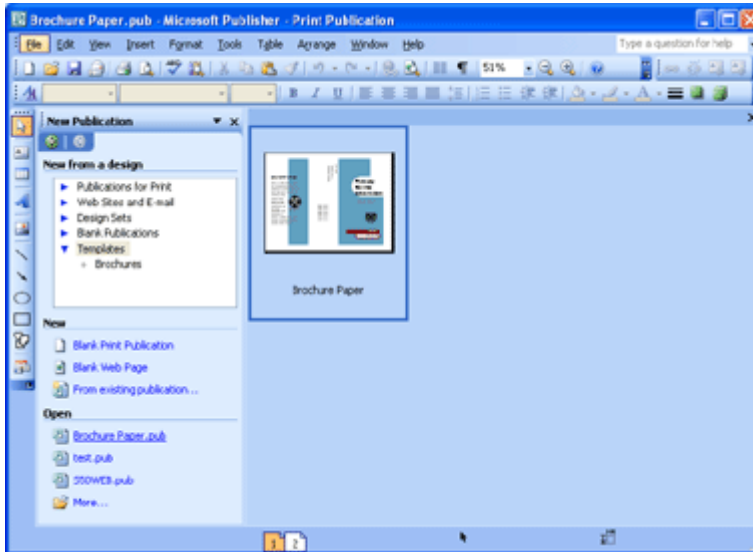


Figure 1-11: Start a new publication based on your saved template.

[Enlarge image](#)

3. Select your saved template to begin a new publication based upon it.

## Group and ungroup objects Page 8 of 8

One optional feature of a brochure is forms, as shown earlier in the Brochure Options task pane. You can select None, Order form, Response form, or Sign-up form. These forms are Design Gallery objects, and you can insert them in any publications, not just brochures. However, with the brochure templates, you can place them automatically using the Brochure Options task pane.

These forms are necessarily generic, and you'll want to customize them. They consist of multiple text boxes that you can move and resize freely. You can also edit the text within them, as shown in Figure 1-12.

Order Form Title

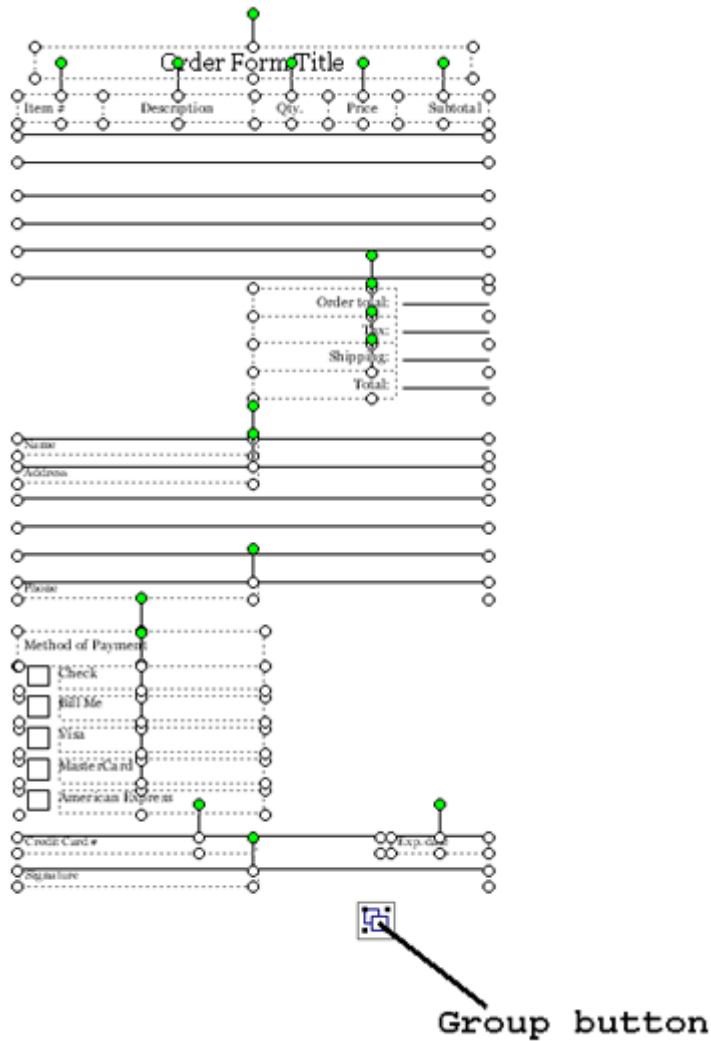
Item #	Description	Qty.	Price	Subtotal

Order total: \_\_\_\_\_  
Tax: \_\_\_\_\_  
Shipping: \_\_\_\_\_  
Total: \_\_\_\_\_

**Figure 1-12: Text on a form can be edited without ungrouping the form object.**

If you want to move or resize the form as a whole, you should group it first. To group the elements of the form into a single object, follow these steps:

1. Zoom out enough that you can see the entire form at once.
2. Using your mouse, drag a box that encompasses all the elements in the form. This is called **lassoing**. When you release the mouse button, all the items inside the box you drew are selected, as shown in Figure 1-13.



**Figure 1-13: Select all the parts of the form and then group them.**

3. Click the Group button (at the bottom of the selection area and shown in Figure 1-13). The objects become a single grouped object, and you can now move and resize the group as a whole.

The individual boxes that make up a form are not grouped by default on a brochure. However, if you place a form manually into a publication from the Design Gallery, the resulting form *is* grouped by default.

You can ungroup the grouped object any time you need to individually edit something in the group. The text can be formatted and edited while it's grouped; however, if you need to move or resize a text box, you need to ungroup it.

To ungroup, click the Ungroup button at the bottom of the selected grouped object, as shown in Figure 1-14.

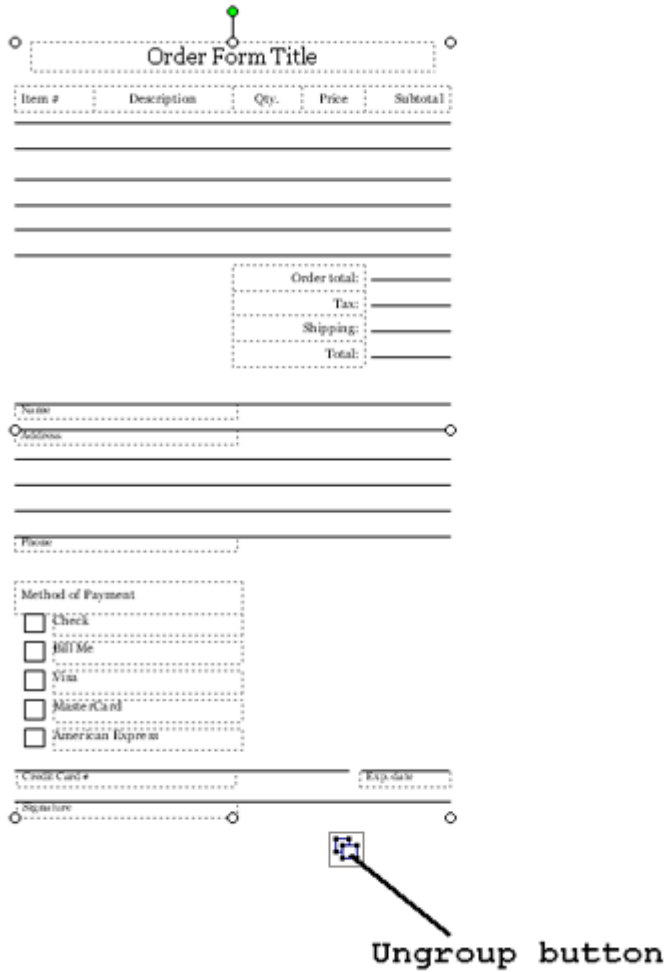


Figure 1-14: Ungroup a grouped object.

### Moving on

In this lesson, you reviewed and expanded upon several key concepts from the *Introduction to Microsoft Publisher 2003* course, including personal information sets and object grouping. You learned how to set up custom column guides for two-sided publications, and how to create and save your own templates. Before you move on, do the assignment and quiz for this lesson, and then check in on the student Message Board with any questions you may have.