Advanced Publisher

This document provides instructions for some of the more advanced features in Publisher, including mail merge, master pages, importing Word documents, and embedding and linking objects.

Publisher vs. Word

Certainly, Microsoft Word can be used to create publications. However, the benefit of using Publisher is the flexibility Publisher provides. Everything in a Publisher publication, including a block of text, is an independent element. Each element can be placed exactly where you want it, and you can control its size, shape, and appearance.

Mail Merge

Mail merge allows you to create a large number of documents that are mostly identical but include some unique information. For example, you can use mail merge to create individually customized publications with personalized notes, like form letters or certificates.

1. From the Tools menu, choose Mailings and Catalogs, then choose Mail Merge.
2. This brings up the **Mail Merge Wizard**. In **Step 1**, select the data source (either from an existing list, from Outlook Contacts, or by creating a new list). Then click **Next**.

3. Browse for the data source, if necessary.

4. From the **Mail Merge Recipients dialog box**, sort, filter, browse for additional data sources, as necessary.
5. In **Step 2**, prepare the publication by dragging merge fields onto the publication as desired. Then click **Next**.

6. In **Step 3**, determine how you would like to produce the merge:
   a. Print or print preview
   b. Merge to a new publication (this allows you to edit/print individual pages)
   c. Add to existing publication (this allows you to merge these pages with an existing publication)

**Creating Master Pages**

Master pages contain the elements that you want to repeat on multiple pages in a publication. By using master pages for these common elements, you can give your publication a more consistent appearance.

Master pages are an invisible layer on which your publication is built. They can contain design and layout elements such as margin guides, headers, footers, and pictures. For example, you can have ‘DRAFT’ appear in a light gray color behind the text on each page of your publication.

Master pages make updates easier, because you can add and update the page elements in one place, instead of changing them on each publication page.

To create a new master page,

1. From the **View menu**, choose **Master Page**.
2. Click the **New Master Page** button. Enter a PageID (a single character identifier) and a brief description. Click **OK**.

3. You can now add elements to the master that you want to appear on all pages.

4. When finished, click **Close Master View**.
To apply a master page,

1. From the **Format** menu, choose **Apply Master Page**.

2. From the **Apply Master Page pane**, select the appropriate master from the dropdown list. Click the **Apply to Page Range** button if you would like to apply the same master to multiple consecutive pages.
3. As new pages are inserted, you can choose which master you would like applied.

To edit a master page,

1. From the View menu, choose Master Page.
2. Next to the appropriate master page, click the dropdown arrow and select the desired action (edit, delete, rename, etc).

Importing a Word Document

Publisher allows you to easily and quickly import a Word document into a publication. For example, you may have already put text in a Word document but would like to take advantage of the graphics tools in Publisher.

To import a Word document,
1. When starting a new publication, in the **Publications Type** list, select **Import Word Documents**. Then select the desired design and click **Create**.

2. To import a Word document into an existing publication, from the **File** menu, choose **Import Word Document**.

3. Browse for the file and click **OK**.
4. The file is then imported into Publisher.

Embedding and Linking Objects

There may be objects that you want to add to your publication. For example, you may want to include an Excel chart. There are two options – inserting a static copy of the chart or inserting a linked copy of the chart. A static copy does not change; it will NOT be updated if the chart is updated in Excel. A linked copy will update if the chart is updated in Excel.

1. Open the Excel workbook and select the chart.
2. From the Home tab, select Copy.
3. Open the publication in which you want to insert the chart.
4. To insert a static copy of the chart, select Paste from the Edit menu.
5. You can then resize/move the chart as desired.

6. To insert a linked copy of the chart, choose **Paste Special** from the **Edit** menu.

7. Select **Paste Link**.

8. Select **Microsoft Office Excel Chart Object**.

9. Click **OK**.

A static copy will not reflect changes made to the data in Excel.
10. The chart in the publication will update as the chart is updated in Excel.

11. To force Publisher to look for updates, choose **Links** from the **Edit** menu. Select the chart, then click **Update Now**.