

Crabby demystifies Publisher terms

Applies to: Microsoft Office Access 2007, Publisher 2007, Access 2003, Publisher 2003

[Print](#)



Crabby Office Lady

In this last column of my summer "demystifying" series, I'll talk about Publisher, one of our most useful and fun-to-use programs. From defining those funky words that describe how characters are spaced to showing you how to make your publications consistent, I hope this week's column will set you on your way to Publisher heaven (or at least to getting a glimpse of that locale).

[Crabby Office Lady columns](#)

[Crabby's blog](#)

[Crabby's podcasts](#)

Publisher has a lot in common with Word. Both have to do with text, images, and complicated types of formatting. But consider this: You wouldn't use a hedge clipper to trim your precious baby's toenails, now, would you? So when you're creating posters, greeting cards, catalogs and brochures, or any sort of branded marketing materials, there's only one way to go: Publisher — it's made for these sorts of jobs.

So let's get right to it and call out some of the basic terms you will run across when you start working in this versatile program.

Master page

Master pages in Publisher are like slide masters in PowerPoint: When you create a new publication that has more than one page, and you want those pages to look consistent, you create a master page. The master page contains the design elements that you want to repeat on multiple pages (thereby avoiding that panicked feeling of running out of time because you have to change all 135 pages of a brochure on the whimsy of your client who decides to swap a picture that appears throughout). When you need to change the look of your publication (or just add an element), instead of having to do that on each and every page, you can update the master page. Yes, the master page is the feature for the control freak inside all of us.

Master pages can contain a variety of design and layout elements, such as headers and footers, page dimensions, pictures, margins, and just about anything you can put on a page.

You can also create more than one master page. If you have a catalog that has the same elements on the front and back covers but want the pages inside to look different from the covers, you can create two masters — one for the covers and one for the inside pages.

Page sorter

You cannot get by in a multi-page publication without your page sorters. These are the page-shaped controls (one for every page in your publication) located in the lower left of the Publisher window. Each control represents a page in your publication, making it easy for you to go back and forth among all the pages in your publication.

You can use the page sorter to move pages within your publication — you just click the page and drag it to its new location.

Page size vs. paper size

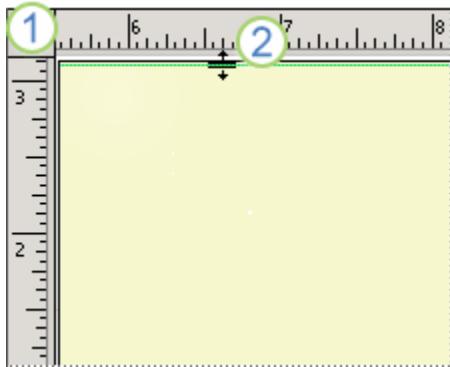
For some reason, page size and paper size seem to be confusing for our customers, so I'll lay it out nice and quick for you here. *Page size* refers to the area of your publication, while *paper size* refers to the size of paper used for printing. As I'm sure you can ascertain, sometimes these two do NOT match up, thereby costing you, the publication designer, much aggravation, heartache, and time.

See, you can have this beautifully designed newsletter or brochure — one that you spent hours and hours getting just right — perfectly set up on your computer, only to find that it doesn't print as you expected. You have to make sure that your page size and your paper size *are the same*.

Rulers and ruler guides

A ruler in Publisher helps you align items horizontally or vertically on your page. You use it to set indents and returns, and also to determine the dimensions of your elements such as text boxes, margins, and any other elements that need to be aligned in a specific way.

A ruler guide is a horizontal or vertical guide that you can align to any point on a ruler. These guides do not print; they're just there to help you organize and set up the elements on your page. You simply click on a spot inside the ruler's edge and then drag the guide — which appears as a double-headed arrow — from the ruler to your publication. When you have a ruler guide on a master page, the ruler guide appears on every page based on that master page. And again, this guide does not print; it's simply there to help you, well, get in line!



- 1 Horizontal and vertical rulers
- 2 Horizontal ruler guide

Overflow and autoflow

A text box can hold only so much text. If you have a lot of text that you've inserted into a text box, the text that doesn't fit into that one box is called the overflow. The overflow will be hidden from you until either you resize that text box so that it will hold all your text or a new text box is made (Publisher will handle that nicely) to handle that overflow.

When you do have more text than your text box can handle, a Publisher message pops up and asks if you want to use autoflow. If you say yes, Publisher will either find an empty text box or create a new one — one that is automatically linked to the first text box — to handle your overflow.

This feature is a great way to manage several columns of text on a page or even multiple pages. Each column is a text box, and Publisher handles all of it. You just go with the flow. (Sorry — couldn't let that one go.)

AutoFit

AutoFit is a feature related to overflow text. As I mentioned in the item above, when you do have overflow, more text than a single text box can handle, Publisher will ask you if you want to use autoflow. But say you don't want to use autoflow. Say you have your reasons for wanting all of that text in one text box, not gallivanting all over the place within multiple text boxes. In that case, you should give **AutoFit** a try.

On the **Format** menu, when you choose **AutoFit**, you'll have two options:

- **Shrink Text On Overflow** means that the size of the text will be reduced until there is no text in overflow.
- **Best Fit** means that even if you resize the text box, the text will resize itself to fit within that text box. So this may include getting bigger or smaller, depending on the size of the text box. The text and the text box move as one. Everyone say "Ommmm."

Tracking, kerning, and scaling

I covered kerning — character spacing — a few years back when I wrote my Fonts 101–104 series. But it's been a while, so let's go over it again, along with its relatives, since these features are very important in this particular Office program.

Tracking and kerning are basically the same thing except that one (kerning) has to do with two specific text characters and the other (tracking) has to do with all the text characters.

Kerning adjusts the spaces between letters so that the spacing appears to be visually consistent. For example, certain letter combinations such as **Ta** have too much space between them. With kerning, you can adjust the spacing to be closer together (or farther apart), making the letters within the word flow together more smoothly.

Tracking does the same thing, but it changes the spacing between ALL the text characters in your publication (and is available only if you're working on a print publication).

Scaling is the shrinking or stretching of the width of text characters. You can make it apply to an entire word, a few of its letters, or even just one character. Like kerning, it's a great way to fine-tune the spacing of your characters.

Leading

Leading (which rhymes with "sledding") is similar to kerning and scaling except that it applies to line spacing instead of character spacing. When you're reading something, the spaces between the line you're reading and the lines above and below that line are supposed to guide your eyes from one line to the next. If that space isn't considered carefully, it's hard to keep track of where you are. That's where leading comes in. You can adjust leading one sentence at a time, but it's more common to adjust an entire paragraph so that it's uniform. (Don't you just love a paragraph in uniform?)

Font schemes and color schemes

When you create a publication, consistency is key. So, for example, it's not a good idea to have a jumble of different colors for your top-level headings, different styles for your bullet points, and different fonts roaming free and generally creating havoc all over your publication. If you're creating a set of identity and brand-building publications (business cards, letterhead, brochures, and so on), having the same fonts and colors for all of these things makes everything look much more professional. And, in fact, your choice of font and color schemes becomes part of that branding. Font style, size, and color can have a big effect on how people perceive you and your company.

When you apply a font scheme to a publication, both a primary (usually titles and headings) and a secondary (usually text) font are specified. Using a font scheme makes it very easy to change your publication if it doesn't look the way you want. If you started with one, you can always change it, and Publisher will make sure that every character, every heading, and every title stays within that scheme. You can use one of the font schemes that came with Publisher, you can create your own, or you can mix your own choices with existing options as a starting point.

A color scheme is basically the same idea, but instead of specifying a font, it designates a certain color for the various parts of your publication — text, headings, bullets, hyperlinks, followed hyperlinks (links that have already been clicked), and so on. And just as with font schemes, you can create your own color scheme.

Applying a specific font scheme and color scheme for all of your company's publications gives them a uniform and consistent look. And it makes it a lot easier on the people who are creating these publications since all they have to do is pick and click which schemes they want to use.

E-mail merge

E-mail merge is new for Publisher 2007. It's a way to send out, in bulk, a newsletter, an invitation, and just about any type of publication you want to send out in e-mail. Previously you had to manage your e-mail addresses by hand. And personalization? Forget it. Everyone got the same information. It was cold, it was impersonal ... and it was obvious that it was cold and impersonal. With this new e-mail merge feature, not only can you automatically address your e-mail messages containing your Publisher document, you can make it look as though you sent them to each and every recipient *individually*.

In a nutshell, you first set up your newsletter (or whatever it is you're sending out) with customizable things like hyperlinks, coupons, and so on. Then you use the E-mail Merge feature in Publisher to connect to (or create) a data source (which is just a fancy name for information). Your data source may contain things like name, address, phone number, special coupon, service reminder, and so on. You start the wizard,

and then tell it which criteria in the data source you need to use in the publication you're sending out. Once you have that all figured out, Outlook will send out your publication in an e-mail to each recipient, personalized the way you want. In the example below, words underlined in blue are the fields that change with every recipient.



Final words

Publisher is one of my favorite Office programs. It's incredibly useful, and it's fun to use. I hope that you enjoyed my summer "demystifying" series — I had fun writing these eight columns and learned a thing or two myself. This fall, I'll be addressing everything from your top issues to how to make your worklife more efficient. Enjoy these last few dregs of summer (and say "Hooray!" that school is back in session).

"In the depth of winter, I finally learned that within me there lay an invincible summer." — Albert Camus

About the author

Annik Stahl, the Crabby Office Lady columnist, takes all of your complaints, compliments, and knee-jerk reactions to heart. Therefore, she graciously asks that you let her know whether this column was useful to you — or not — by entering your feedback using the **Did this article help you?** feedback tool below. And remember: If you don't vote, you can't complain.

[Crabby Office Lady columns](#)
[Crabby's blog](#)
[Crabby's podcasts](#)